



New York Physician Supply and Demand Through 2030



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Preface

This report presents an analysis of the current physician workforce and forecasts of the future physician workforce in New York. It provides forecasts of the supply of and demand for physicians throughout the state by specialty through 2030. This report was prepared for and with funding from the New York State Department of Health. This report is intended to provide useful information for policy makers, educators, and other interested parties.

This report was prepared by the Center for Health Workforce Studies at the School of Public Health, University at Albany, State University of New York. The Center is dedicated to the collection, analysis, and distribution of health workforce data to assist health, professional and educational organizations, policy makers, and the public understand issues related to the supply, demand, distribution, and use of health workers. This report was prepared by Gaetano J. Forte, Jean Moore, David P. Armstrong, Sandra McGinnis, and Mark Dionne. The views expressed in this report are those of the Center for Health Workforce Studies and do not necessarily represent positions or policies of the School of Public Health, University at Albany, State University of New York, or the New York State Department of Health.

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Executive Summary

Introduction

An adequate supply and distribution of physicians is an essential component of an effective health care system. While there is no simple ratio to determine how many physicians a nation, state, or region should have, it is possible to evaluate the adequacy of physician supply of a particular geographic area by applying supply and demand models that inform physician workforce decisions. Due to the length of time and great expense required for physician education and training, it is prudent to anticipate likely physician supply and demand imbalances well in advance of their potential occurrence. To that end, the Center for Health Workforce Studies has conducted an assessment of the future supply and demand for physicians in New York through 2030. The goal of the assessment is to identify future physician supply and demand imbalances and suggest strategies for reconciling those imbalances. This report highlights the main findings of the Center's physician supply and demand forecasts.

Background

National Perspective

In January 2005, the federal Council on Graduate Medical Education (COGME) released its sixteenth report, *Physician Workforce Policy Guidelines for the United States, 2000 – 2020*. The report detailed forecasts of national physician supply and demand that indicated a substantial shortage of physicians by 2020. The magnitude of the shortage was estimated at 85,000 to 96,000 physicians, or between 7.5 and 8.5 percent of the likely number of physicians required to provide services for the nation's population in 2020.

One of the failings of federal COGME's report, however, was its lack of attention to regional and specialty-specific variations embedded in its forecasts. Consequently, concerned stakeholders in a number of states conducted studies to determine how the projected national physician shortage would play out in their areas. Efforts to forecast physician supply/demand gaps were undertaken in Wisconsin, Kentucky, Arizona, California, Colorado, Oregon, Michigan, New Jersey, North Carolina, Mississippi, Texas, and Massachusetts. Further, in the past several years, specialty-specific studies in cardiology, endocrinology, allergy and immunology, psychiatry, neurosurgery, pediatric subspecialties, dermatology, medical genetics, radiology, geriatric medicine, and critical care have also yielded findings of current or future shortages of physicians.

New York Perspective

With more than a dozen medical schools and over 15,000 residents and fellows, New York has made a considerable investment in training new physicians. The New York State Council on Graduate Medical Education was asked by Health Commissioner Richard Daines to consider issues related to the state's GME system and asked for recommendations on GME improvements and reforms. In response to this request, the Council deliberated and released a report¹ in 2008 with recommendations about strengthening GME policy in the state. The report focused on several themes, including transparency and accountability in GME funding, improving the quality of training, promoting diversity in medicine, and recognition of the role of GME as an important source of new physicians in the state. The report presented a number of policy recommendations, including enhancing strategies to attract physicians to underserved communities, and supporting efforts to collect data that provide regular, periodic information about and analysis of physician supply in relation to demand for them. Some of these policy recommendations resulted in the establishment of new programs and

¹ New York State Council on Graduate Medical Education. *Policy Recommendations to the Commissioner of Health*. March 2008. http://www.health.state.ny.us/nysdoh/gme/reports/docs/policy_recommendations.pdf.

policies designed to address physician maldistribution and shortages. One of these programs, a loan repayment and practice support initiative, *Doctors Across New York*, was implemented in 2008 to encourage physician recruitment and retention in underserved areas.

The COGME report acknowledged the work of the Center for Health Workforce Studies at the School of Public Health, University at Albany. The Center has monitored the physician workforce in New York for more than a decade.

- Since 1996, the Center has managed the New York Physician Licensure Re-registration Survey. Data drawn from this ongoing survey have become an important source of information on active physicians in the state.
- Beginning in 1998, the Center has conducted an annual survey of residents and fellows completing graduate medical training in New York. These data are used to monitor changes in the relative demand for various medical specialties.

Together, these research projects provide a critical base of information to understand supply and distribution of physicians in the state. In fact, findings from both of these sources were used in the analyses described in this report.

Key Findings

1. Between 2006 and 2030, growth in the demand for physicians in New York will likely outpace growth in the supply of physicians.

Using forecasting models adapted to include data specific to New York, the Center developed a variety of supply and demand scenarios to estimate the potential impact of a number of factors, including changes in the retention of physicians trained in the state, the implementation of universal health insurance, and efforts to make the delivery of health care more efficient. Based on these forecasting models, the Center concluded that between 2006 and 2030, growth in the demand for physicians in New York would likely outpace growth in the supply of physicians. The forecasts suggested that New York was likely to face a physician shortage in 2030, and, in the case of areas and populations already experiencing shortages, the intensification of current shortages. The magnitude of forecast difference between supply and demand growth was between 2,500 and 17,000 physicians, or between 3 and 15 percent of the number of physicians required to meet the anticipated demand for physician services in 2030.

2. The number of physicians practicing in New York continues to grow.

The number of physicians in New York was forecast to grow as long as the state continues to retain the physicians who train in the state at the rate it currently does. If the retention of physicians trained in the state were to decline below current levels, the overall number of physicians in the state could begin to decline within a decade or sooner.² However, the supply forecasts differed across specialties. A number of specialties were

² In its most recent annual reports on physicians completing graduate medical training in New York, the Center has observed that a smaller percentage of new physicians are remaining in New York to practice. Moreover, the Center has also observed a slight downward trend in the percentage of physicians with practice addresses in New York among all active physicians licensed to practice medicine in the state. Should these newly observed trends continue, the decline in physicians may begin sooner than predicted in supply scenario 3b.

projected to experience growth over the entire forecast period: anesthesiology, cardiovascular disease, emergency medicine, general pediatrics, general surgery, orthopedic surgery, radiology, and other internal medicine subspecialties. A number of specialties were projected to experience a period of growth, then decline from about 2020 to the end of the forecast period: general internal medicine, general/family medicine, obstetrics and gynecology, and otolaryngology. Finally, and most immediately problematic, there were a number of specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, psychiatry, urology, and other surgical specialties.

3. Demand for physicians practicing in New York continues to grow.

The number of physicians required to meet the demand for their services in New York was forecast to continue to grow from 2006 to 2030. Even after factoring in potential modest gains in the efficiency of the health care delivery system, demand for physicians in the state was projected to grow. Physician demand was not forecast to grow at the same rate across all specialties, however. In most specialties, demand was forecast to grow through 2030. The fastest growth in demand was forecast in cardiovascular diseases (1.0 percent annually), ophthalmology (0.9 percent annually), and urology (0.9 percent annually). Slower growth was forecast for emergency medicine (0.3 percent annually), psychiatry (0.4 percent annually), and general/family medicine (0.4 percent annually). No growth was forecast for obstetrics and gynecology and general pediatrics. These forecast rates of physician demand growth were increased in scenarios simulating the implementation of universal health insurance and a growing economy.

4. The forecast growth in demand for physicians was not evenly distributed across all parts of the state.

Based on forecast changes in the size and composition of the population, most regions of the state were forecast to experience growth in demand for physicians. The exceptions were Central New York and Mohawk Valley, which were projected to experience no significant change in physician demand during the forecast period, and Western New York, which was projected to experience a decline in physician demand. New York City was forecast to experience the greatest growth in physician demand.

5. The greatest gaps between supply and demand growth were projected in specialties that were forecast to lose physicians.

Since demand was forecast to grow in almost all specialties, the greatest gaps between supply and demand growth were projected in those specialties that were forecast to lose physicians: ophthalmology, urology, psychiatry, pathology, some surgical subspecialties. Large gaps between supply and demand growth were also projected in those specialties that were forecast to experience a period of growth, then a period of decline: general internal medicine, general/family medicine, and otolaryngology. Smaller gaps were projected in some of the specialties that were forecast to grow throughout the period as well: anesthesiology and orthopedic surgery. For other specialties that were projected to grow throughout the period, no gaps were forecast: radiology and general surgery. Finally, in a number of specialties, supply was projected to grow more quickly than demand: cardiovascular diseases, emergency medicine, general pediatrics, and some internal medicine subspecialties.

6. The greatest gaps between supply and demand growth were forecast in regions where demand was forecast to grow most rapidly.

Similarly, with regard to regional supply and demand gaps, the greatest gaps were projected in regions where demand was forecast to grow most rapidly. New York City and the Hudson Valley, in particular, were forecast to experience the greatest gap between physician supply and demand in 2030. In those regions, the gaps between physician supply and demand approached 10 percent, with some specialties (e.g., urology, pathology, and ophthalmology) forecast to experience gaps greater than 33 percent, and adult primary care physician supply and demand gaps of greater than 12 percent. On the other hand, while no region of the state was immune to physician supply and demand gaps, physician supply growth was forecast to more closely parallel physician demand growth in the Capital District and the Finger Lakes regions.

7. Current shortages of physicians are likely to grow worse over time.

It should be noted that the forecast gaps between supply growth and demand growth detailed in this report ignore existing physician shortages. With 107 designated primary care health professional shortages areas, there are areas of the state and populations that are already underserved by the current physician supply. The implications of the forecasts for these areas and populations are dire. Areas and populations that are already underserved will continue to suffer and are likely to experience even greater physician shortages in the future than they do now.

Moreover, efforts to expand access to physician services by implementing universal health insurance programs will exacerbate these forecast physician supply and demand gaps. Efforts to expand and strengthen the health safety net need to take into account physician workforce issues and the forecast shortages presented in this report. Successful reform will entail addressing both the expansion of access to health insurance and the expansion of physician services in the state.

Forecasting Physician Supply and Demand through 2030 in New York

There are many factors to be considered when forecasting physician supply and demand in a particular area. These include (but are not limited to) the size and characteristics of the current physician supply and of new physicians entering the workforce; how physician services are utilized in terms of the characteristics of patients, the location where the services are provided, and who provides them; and the characteristics of the population in the particular area. Also important are potential medical advances, physician practice and migration patterns, public and private health care cost-containment efforts, changes in the health care delivery system and health insurance coverage, and a host of other related factors.

Characteristics of Physicians in New York in 2006 and Recent Trends in Supply and Distribution

In 2006, there were 79,451 licensed physicians in New York. Seventy-nine percent (62,770) were active patient care physicians. Of the active patient care physicians, 72 percent practiced in downstate New York³ and 91 percent practiced in urban counties.

Physician Distribution

Physicians in New York were not distributed evenly in 2006. The ratio of physicians to the population was highest in the New York City region, with 387 active patient care physicians per 100,000 population. The ratio was lowest in the Mohawk Valley, with 165 physicians per 100,000 population.

Despite overall growth statewide in the physician supply between 2002 and 2006, two regions experienced declines in the number of active patient care physicians per 100,000 population. The Mohawk Valley and Western New York regions experienced physician declines of 4 percent and 1 percent, respectively, between 2002 and 2006. Several regions experienced very little growth in the physician supply between 2002 and 2006. The Capital District, Central New York, Finger Lakes, and Southern Tier regions experienced physician per 100,000 population growth of 3 percent or less.

More than 19,000 physicians (30 percent of the total) reported one of the primary care specialties (family medicine, general internal medicine, and general pediatrics) as their principal specialty. Between 2002 and 2006, the number of primary care physicians per 100,000 population grew in all regions of the state except Central New York, Mohawk Valley, North Country, and Western New York. The decline in primary care physician supply in these regions ranged from less than 1 percent in Mohawk Valley to 5 percent in North Country.

The number of non-primary care physicians per 100,000 population grew in all regions of the state except in the Capital District, Mohawk Valley, and Western New York regions. Declines in the number of non-primary care physicians per 100,000 population in these areas ranged from 1 percent in Western New York to 7 percent in the Mohawk Valley.

³ Downstate New York includes the following counties: Bronx, Kings, Nassau, New York, Queens, Richmond, Suffolk, and Westchester.

Figure 1 Physician Supply and Distribution in New York, 2006

Number of Active Patient Care Physicians per 100,000 Population by Region

Specialty	Capital District	Central New York	Finger Lakes	Hudson Valley	Long Island	Mohawk Valley	New York City	North Country	Southern Tier	Western New York	New York (Total)
Primary Care	84	72	91	98	100	66	114	65	82	77	99
Non-Primary Care	170	179	172	217	248	99	273	116	153	158	226
Obstetrics/Gynecology	13	15	14	17	18	7	21	12	13	12	18
Internal Medicine Specialties	35	32	31	35	55	15	56	13	26	27	45
General Surgery	7	8	7	8	9	6	9	8	9	8	8
Surgical Subspecialties	32	37	27	36	41	18	40	21	31	31	36
Facility Based	30	35	34	36	49	22	43	22	33	30	39
Psychiatry	19	17	19	43	25	15	46	14	17	13	33
Other Specialties	34	35	40	42	51	16	58	26	24	37	47
Total	254	251	263	315	348	165	387	181	235	235	325

Physician Demographics

Active patient care physicians in New York were predominantly male (70 percent) in 2006. However, women physicians were significantly younger than men, reflecting the growing number of women entering the profession. The average age of women in the physician workforce was 47.1 years compared to 52.8 years for men.

Seventy percent of active patient care physicians in New York were non-Hispanic Whites. Underrepresented minorities (URMs) (Blacks/African Americans, Hispanics/Latinos, and American Indians) made up 10 percent of the physician workforce in 2006. At the same time, URMs made up approximately 35 percent of New York’s population.

Physician Training and Certification

Thirty-eight percent of active patient care physicians in New York were graduates of medical schools located in New York. Thirty-six percent of active patient care physicians were international medical graduates (IMGs), that is, they attended medical school outside the United States or Canada. There were significant variations in the percentage of IMGs by specialty. For instance, 52 percent of pathologists reported being IMGs while less than 10 percent of dermatologists were IMGs. In terms of graduate medical training, more than 75 percent of the active patient care physicians practicing in New York had completed residency or fellowship training in the state.

Eighty percent of physicians were certified by the nationally recognized American Board of Medical Specialties in their principal specialty. This figure varied significantly across specialties, from 60 percent in occupational medicine to 90 percent in pathology.

Practice Characteristics

The most common principal specialty among active patient care physicians was general internal medicine. More than 9,800 (nearly 16 percent of all active patient care physicians) practiced general internal medicine as their principal specialty. This was followed by adult psychiatry (9 percent), general pediatrics (8 percent), and family medicine (7 percent).

Group practice was the largest principal practice setting in 2006, with 37 percent of physicians in New York. Solo practice (28 percent) and hospital practice (27 percent) were the next most frequent practice settings.

Demographic Trends in New York

The most recently released population forecasts⁴ suggested that the U.S. will experience a 25 percent increase in population between 2006 and 2030. This forecast amounted to a 0.93 percent average annual growth rate. By contrast, New York was forecast to grow much more slowly from 19.3 million to just over 20 million (3.8 percent) over the same time period. This forecast amounted to a 0.16 percent average annual growth rate – one of the slowest rates in the nation. Moreover, because of this very slow growth rate, New York was forecast make up a smaller portion of the total U.S. population in 2030 than it did in 2006.

Figure 2 Anticipated Population Change in New York, 2006-2030

Region	Total Population						% Change 2006 to 2030	Avg Annual % Change
	2006	2010	2015	2020	2025	2030		
Capital District	1,063,621	1,063,173	1,062,733	1,059,133	1,050,684	1,036,696	-2.5%	-0.11%
Central New York	716,032	706,963	696,152	683,492	668,202	650,046	-9.2%	-0.40%
Finger Lakes	1,205,419	1,206,018	1,207,086	1,205,606	1,199,061	1,186,249	-1.6%	-0.07%
Hudson Valley	2,281,845	2,309,665	2,344,431	2,377,124	2,401,883	2,415,524	5.9%	0.24%
Long Island	2,831,266	2,831,259	2,831,291	2,830,637	2,818,832	2,789,402	-1.5%	-0.06%
Mohawk Valley	507,194	502,322	496,150	488,802	479,942	468,912	-7.5%	-0.33%
New York City	8,119,187	8,289,458	8,507,739	8,720,871	8,910,821	9,073,034	11.7%	0.46%
North Country	425,633	429,820	435,774	440,406	444,288	447,345	5.1%	0.21%
Southern Tier	719,143	715,303	711,041	704,192	695,422	684,532	-4.8%	-0.21%
Western New York	1,420,166	1,399,137	1,372,619	1,344,494	1,313,277	1,277,106	-10.1%	-0.44%
<i>Total</i>	<i>19,289,506</i>	<i>19,453,118</i>	<i>19,665,016</i>	<i>19,854,757</i>	<i>19,982,410</i>	<i>20,028,847</i>	<i>3.8%</i>	<i>0.16%</i>
U.S. (in 1,000s)	298,755	310,233	325,540	341,387	357,452	373,504	25.0%	0.93%
NY % of U.S.	6.5%	6.3%	6.0%	5.8%	5.6%	5.4%		

Forecast growth rates varied considerably across regions as well. The New York City region was forecast to grow at the quickest rate (0.46 percent per year) from 2006 to 2030. Only two other regions were forecast to grow between 2006 and 2030, the Hudson Valley region at 0.24 percent per year and the North Country region at 0.21 percent per year. The remaining regions were forecast to shrink between 2006 and 2030. The greatest decline in population was forecast for the Western New York region (0.44 percent per year, 10.1 percent over the forecast period), followed closely by the Central New York region (0.40 percent per year, 9.2 percent over the forecast period) and the Mohawk Valley region (0.33 percent per year, 7.5 percent over the forecast period). The differences across the regional population change rates had significant effects on the physician demand forecasts as well, especially for the primary care specialties.

While the population age 65 and older in the U.S. was forecast to nearly double between 2006 and 2030, New York's population was forecast to age at a slower rate. Between 2006 and 2030, New York's population age 65 and older was forecast to grow by 1.59 percent per year compared to the U.S. growth rate of 2.79 percent per year. The New York City region was forecast to experience the quickest growth rate in this age group over the forecast period (1.87 percent per year), followed closely by the Hudson Valley region (1.67 percent per year) and the Capital District (1.66 percent).

⁴ Population projection data were obtained from the Cornell Program on Applied Demographics in February 2008. <http://pad.human.cornell.edu/che/BLCC/pad/data/projections02.cfm>.

Figure 3 Anticipated Aging of New York's Population, 2006-2030

Region	Population Age 65 and Older						% Change 2006 to 2030	Avg Annual % Change
	2006	2010	2015	2020	2025	2030		
Capital District	150,690	158,008	177,498	198,211	216,084	223,465	48.3%	1.66%
Central New York	96,452	99,075	107,946	118,510	127,978	131,165	36.0%	1.29%
Finger Lakes	161,870	169,411	188,791	210,010	229,595	237,837	46.9%	1.62%
Hudson Valley	292,568	307,037	340,171	376,108	413,750	434,940	48.7%	1.67%
Long Island	387,451	399,853	436,188	476,777	520,382	544,313	40.5%	1.43%
Mohawk Valley	80,408	81,698	88,178	95,994	102,656	104,590	30.1%	1.10%
New York City	989,386	1,030,284	1,148,324	1,291,158	1,437,985	1,543,172	56.0%	1.87%
North Country	56,644	58,536	64,174	71,079	77,476	80,515	42.1%	1.48%
Southern Tier	108,440	111,337	120,941	131,800	141,517	144,261	33.0%	1.20%
Western New York	222,161	221,486	233,659	252,254	271,980	277,444	24.9%	0.93%
<i>Total</i>	<i>2,546,070</i>	<i>2,636,725</i>	<i>2,905,871</i>	<i>3,221,900</i>	<i>3,539,403</i>	<i>3,721,702</i>	<i>46.2%</i>	<i>1.59%</i>
Percent 65+	13.2%	13.6%	14.8%	16.2%	17.7%	18.6%		
U.S. (in 1,000s)	37,253	40,229	46,837	54,804	63,907	72,092	93.5%	2.79%
Percent 65+	12.5%	13.0%	14.4%	16.1%	17.9%	19.3%		
NY % of U.S. 65+	6.8%	6.6%	6.2%	5.9%	5.5%	5.2%		

Physician Supply and Demand Forecast Scenarios and Assumptions

In this summary of findings from the examination of the adequacy of the physician workforce in New York, several supply scenarios and several demand scenarios are presented.

Supply

The generic assumptions of all of the supply scenarios were that the capacity to train physicians in New York would remain constant over the forecast period; physician specialization patterns would remain consistent with recent trends among physicians in the state; and physician retirement rates controlling for age, gender, location of medical school, and specialty would remain consistent with recent trends. Below the additional assumptions from each scenario are described.

In the first supply scenario, considered the baseline supply scenario, it was further assumed that: 1) the net-migration of physicians to the state would remain constant over the forecast period, and 2) nurse practitioners (NPs) and physician assistants (PAs) would grow at the same rate as physicians over the forecast period.

In the second supply scenario, in addition to the generic assumptions it was assumed that: 1) the net-migration of physicians to the state would remain constant over the forecast period, and 2) NPs and PAs would grow more quickly than physicians. Within this scenario, two NP/PA growth rates were modeled: 1) the same rate they grew between 2002 and 2008 (adding nearly 1,000 new practitioners annually); and 2) half the rate they grew between 2002 and 2008 (adding about 500 new practitioners annually) over the forecast period.

In the third supply scenario, in addition to the generic assumptions it was assumed that: 1) the net-migration of physicians to the state would change over the forecast period, and 2) NPs and PAs would grow at the same rate as physicians over the forecast period. Within this scenario, two net-migration alternatives were modeled. The first alternative was that the state will retain 100 additional physicians annually beginning in 2009. This alternative closely paralleled the goals of New York State Department of Health's newly implemented *Doctors*

Across New York program. The first alternative was further explored by modeling three potential specialty distributions for these additional 100 physicians: 1) 33 percent primary care/67 percent non-primary care, 2) 25 percent primary care/75 percent non-primary care, and 3) 20 percent primary care/80 percent non-primary care. Recently, the distribution for new physicians was approximately 27 percent primary care and 73 percent non-primary care. The second alternative was that the state would retain 100 fewer physicians annually beginning in 2009. This alternative portrayed the potential outcome of increased competition for physicians among states given the national physician shortage context.

Demand

The generic assumptions of all of the demand scenarios were that utilization rates of physician services by age, gender, insurance status, and rurality would remain constant over the forecast period; anticipated population change would follow the trends described in the previous section; and no significant changes would occur in the reimbursement of physician services.

In the first demand scenario, considered the baseline demand scenario, it was further assumed that: 1) the long term economic health of the state would remain stable over the forecast period; 2) there would be no significant changes in the level of insurance coverage in the state; and 3) there would be no significant improvement in the identification or reduction of unnecessary/marginally-beneficial/duplicative services in the health care delivery system.

In the second demand scenario, in addition to the generic assumptions it was assumed that: 1) there would be modest long term economic growth in the state of an additional 1 percent annually⁵ over the forecast period; 2) there would be no significant changes in the level of insurance coverage in the state; and 3) there would be no significant improvement in the identification or reduction of unnecessary/marginally-beneficial/duplicative services in the health care delivery system.

In the third demand scenario, in addition to the generic assumptions it was assumed that: 1) the long term economic health of the state would remain stable over the forecast period; 2) there would be a constant increase in the proportion of the population that has health insurance, and by 2020, all residents of the state would have health insurance; and 3) there would be no significant improvement in the identification or reduction of unnecessary/marginally-beneficial/duplicative services in the health care delivery system.

In the fourth demand scenario, in addition to the generic assumptions it was assumed that: 1) the long term economic health of the state would remain stable over the forecast period; 2) there would be no significant changes in the level of insurance coverage in the state; and 3) there would be a modest improvement in the identification and reduction of unnecessary/marginally-beneficial/duplicative non-primary care services in the delivery of physician services over the forecast period, resulting in a 5 percent efficiency gain in the provision of non-primary care services by 2030.

Statewide Physician Supply and Demand Forecasts

Supply

⁵ To put this assumption into perspective, between 2003 and 2007, New York experienced an average annual growth in real gross state product of 3.2 percent (10th highest in the country). Between 1998 and 2007, the average annual growth rate was 3.1 percent (9th highest in the country). The average annual growth of real gross domestic product in the U.S. during those time periods was 2.3 percent and 2.4 percent, respectively (Source: BEA data retrieved November 2008).

Statewide, the baseline physician supply forecast anticipated that there would be 82,942 physicians in New York in 2030. Over the forecast period, the average annual growth rate in the baseline scenario was 0.39 percent. Primary care physicians were projected to grow at a slower rate than non-primary care physicians (0.19 percent compared to 0.49 percent), resulting in 26,489 primary care and 56,453 non-primary care physicians in 2030.

Figure 4. New York Physician Supply Forecast: Scenarios 1 and 2

Specialty	Scenario 1 Supply Baseline		Scenario 2a High Growth NPs/PAs		Scenario 2b Lower Growth NPs/PAs	
	Anticipated Supply 2030	Average Annual Growth Rate	Anticipated Supply 2030	Average Annual Growth Rate	Anticipated Supply 2030	Average Annual Growth Rate
		(2006-2030)		(2006-2030)		(2006-2030)
Primary Care	26,489	0.19%	30,921	0.84%	28,632	0.52%
Non-Primary Care	56,453	0.49%	61,297	0.84%	58,754	0.66%
Total	82,942	0.39%	92,219	0.84%	87,386	0.61%

Supply forecasts differed across specialties (See Figure 5). A number of specialties were projected to experience growth over the entire forecast period: anesthesiology, cardiovascular disease, emergency medicine, general pediatrics, general surgery, orthopedic surgery, radiology, and other internal medicine subspecialties. A number of specialties were projected to experience a period of growth, then decline from about 2020 to the end of the forecast period: general internal medicine, general/family medicine, obstetrics and gynecology, and otolaryngology. Finally, and most immediately concerning, there were a number of specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, psychiatry, urology, and other surgical specialties.

Figure 5. New York Physician Specialty Supply Forecast

Specialty	Scenario 1 Supply Baseline			
	Supply 2006	Anticipated Supply 2030	Percent Change (2006-2030)	Average Annual Growth Rate (2006-2030)
Anesthesiology	3,695	4,085	11%	0.42%
Cardiovascular Diseases	2,335	3,059	31%	1.13%
Emergency Medicine	2,712	4,265	57%	1.90%
General Internal Medicine	14,242	14,810	4%	0.16%
General Pediatrics	5,939	6,631	12%	0.46%
General Surgery	2,683	3,146	17%	0.67%
General/Family Medicine	5,108	5,048	-1%	-0.05%
Obstetrics and Gynecology	3,832	4,027	5%	0.21%
Ophthalmology	1,974	1,601	-19%	-0.87%
Orthopedic Surgery	1,931	2,132	10%	0.41%
Other Internal Medicine Subspecialties	8,974	12,889	44%	1.52%
Other Specialties	7,470	7,750	4%	0.15%
Other Surgical Specialties	1,399	1,215	-13%	-0.59%
Otolaryngology	828	778	-6%	-0.26%
Pathology	1,716	1,286	-25%	-1.19%
Psychiatry	6,166	5,238	-15%	-0.68%
Radiology	3,548	4,221	19%	0.73%
Urology	937	761	-19%	-0.86%
Primary Care	25,289	26,489	5%	0.19%
Non-Primary Care	50,200	56,453	12%	0.49%
Total	75,489	82,942	10%	0.39%

Assuming that the growth of NPs and PAs would remain constant at its current level, supply scenario 2a anticipated that, effectively⁶, there would be 92,219 physicians in New York in 2030. Over the forecast period, the average annual growth rate in scenario 2a was 0.84 percent. Both primary care and non-primary care physicians were forecast to grow at an annual rate of 0.84 percent as well, resulting in the equivalent of 30,219 primary care physicians and 61,297 non-primary care physicians in 2030.

Because it is not clear that NPs and PAs will continue to grow at as aggressive a rate as they have over the past decade, supply scenario 2b was developed assuming that NPs and PAs would grow at half that rate over the course of the forecast period. Under this assumption, there would be the equivalent of 87,386 physicians in New York in 2030. Over the forecast period, the average annual growth rate in scenario 2b was 0.61 percent. Primary care physicians were projected to grow at a slower rate than non-primary care physicians (0.52 percent

⁶ The additional physicians forecast in this scenario are actually NPs and PAs translated into physician equivalents. Assuming recent growth rates, the number of NPs and PAs is forecast to more than double between 2006 and 2030, growing at an average annual rate of 3.3 percent. Since the baseline physician scenario assumes growth rates of NPs and PAs that are equal to physicians, this scenario generates additional NPs and PAs. The additional NPs and PAs are then converted into equivalent physicians using a productivity multiplier (0.70 for primary care practitioners and 0.33 for non-primary care practitioners).

compared to 0.66 percent), resulting in the equivalent of 28,632 primary care and 58,754 non-primary care physicians in 2030.

Relaxing the generic assumptions once again and adding an additional 100 physicians annually to the supply in the state, supply scenario 3a projected there would be 84,942 physicians in New York in 2030. Over the forecast period, the average annual growth rate in scenario 3a was 0.49 percent. For the primary care and non-primary supply forecasts, several alternative distributions of the additional 100 physicians were modeled (see Figure 6): 1) 33 percent primary care/67 percent non-primary care; 2) 25 percent primary care/75 percent non-primary care; 3) 20 percent primary care/80 percent non-primary care⁷. For primary care physicians, the alternatives suggested a range of between 26,889 and 27,155 physicians in New York in 2030, with an average annual growth rate of between 0.26 and 0.30 percent. For non-primary care physicians, the alternatives suggested a range of between 57,787 and 58,053 physicians in 2030, with an average annual growth rate of between 0.59 and 0.61 percent.

Figure 6. New York Physician Supply Forecast: Scenario 3a

Specialty	Scenario 3a - Increase in Physician Retention					
	33% Primary Care / 67% Non-Primary Care		25% Primary Care / 75% Non-Primary Care		20% Primary Care / 80% Non-Primary Care	
	Anticipated Supply 2030	Average Annual Growth Rate (2006-2030)	Anticipated Supply 2030	Average Annual Growth Rate (2006-2030)	Anticipated Supply 2030	Average Annual Growth Rate (2006-2030)
Primary Care	27,155	0.30%	26,989	0.27%	26,889	0.26%
Non-Primary Care	57,787	0.59%	57,953	0.60%	58,053	0.61%
Total	84,942	0.49%	84,942	0.49%	84,942	0.49%

Supply scenario 3a demonstrated what a physician recruitment/retention program like *Doctors Across New York* might be able to accomplish in the state. On the other hand, increased competition from other states facing a national physician shortage environment is certainly likely, so understanding how retaining fewer physicians would impact the state's future physician supply is important. Supply scenario 3b assumed that the state would add 100 fewer physicians annually to the supply in the state. This scenario suggested that there would be 80,942 physicians in New York in 2030. Over the forecast period, the average annual growth rate in scenario 3b was 0.29 percent. Again, for the primary care and non-primary supply forecasts, several alternative distributions of the 100 physicians were modeled (see Figure 7): 1) 33 percent primary care/67 percent non-primary care; 2) 25 percent primary care/75 percent non-primary care; and 3) 20 percent primary care/80 percent non-primary care. For primary care physicians, the alternatives suggested a range of between 25,823 and 26,089 physicians in New York in 2030, with an average annual growth rate of between 0.09 and 0.13 percent. For non-primary care physicians, the alternatives suggested a range of between 54,853 and 55,119 physicians in 2030, with an average annual growth rate of between 0.37 and 0.39 percent.

Figure 7. New York Physician Supply Forecast: Scenario 3b

⁷ In the recent past, the distribution of new physicians added to the New York physician supply has been 26 percent primary care and 74 percent non-primary care.

Specialty	Scenario 3b - Decrease in Physician Retention					
	33% Primary Care / 67% Non-Primary Care		25% Primary Care / 75% Non-Primary Care		20% Primary Care / 80% Non-Primary Care	
	Average Annual		Average Annual		Average Annual	
	Anticipated Supply 2030	Growth Rate (2006-2030)	Anticipated Supply 2030	Growth Rate (2006-2030)	Anticipated Supply 2030	Growth Rate (2006-2030)
Primary Care	25,823	0.09%	25,989	0.11%	26,089	0.13%
Non-Primary Care	55,119	0.39%	54,953	0.38%	54,853	0.37%
Total	80,942	0.29%	80,942	0.29%	80,942	0.29%

Demand

Statewide, the baseline physician demand forecast anticipated that demand for physicians would grow to 86,589 physicians in New York in 2030. Over the forecast period, the average annual growth rate in the baseline scenario was 0.57 percent. Demand for primary care physicians was projected to grow at a slightly slower rate than demand for non-primary care physicians (0.52 percent compared to 0.60 percent), resulting in demand for 28,640 primary care and 57,949 non-primary care physicians in 2030.

Figure 8. New York Physician Demand Forecast: Scenarios 1 and 2

Physician was not to grow at rate specialties Figure 9).	Specialty	Scenario 1 Demand Baseline		Scenario 2 Growing Economy		demand forecast the same across all (see In most
		Anticipated Demand 2030	Average Annual Growth Rate (2006-2030)	Anticipated Demand 2030	Average Annual Growth Rate (2006-2030)	
		Primary Care	28,640	0.52%	30,752	
Non-Primary Care	57,949	0.60%	67,034	1.21%		
Total	86,589	0.57%	97,786	1.08%		

specialties, demand was projected to grow through 2030. The fastest growth was forecast in cardiovascular diseases (1.0 percent annually), ophthalmology (0.9 percent annually), and urology (0.9 percent annually). Slower growth was projected for emergency medicine (0.3 percent annually), psychiatry (0.4 percent annually), and general/family medicine (0.4 percent annually). Overall, negligible change in demand was projected for obstetrics and gynecology and general pediatrics. In the case of obstetrics and gynecology, demand was projected to grow at a very slow rate at the beginning of the forecast period, and then decline very slowly from 2020 through 2030. For pediatrics, demand was projected to decline through 2015, and then slowly increase through 2030.

Figure 9. New York Physician Specialty Demand Forecast

Specialty	Scenario 1 Demand Baseline			
	Demand 2006	Anticipated Demand 2030	Percent Change (2006-2030)	Average Annual Growth Rate (2006-2030)
Anesthesiology	3,695	4,384	19%	0.71%
Cardiovascular Diseases	2,335	2,968	27%	1.00%
Emergency Medicine	2,712	2,880	6%	0.25%
General Internal Medicine	14,242	17,096	20%	0.76%
General Pediatrics	5,939	5,901	-1%	-0.03%
General Surgery	2,683	3,148	17%	0.67%
General/Family Medicine	5,108	5,643	10%	0.42%
Obstetrics and Gynecology	3,832	3,865	1%	0.04%
Ophthalmology	1,974	2,427	23%	0.86%
Orthopedic Surgery	1,931	2,247	16%	0.63%
Other Internal Medicine Subspecialties	8,974	10,783	20%	0.77%
Other Specialties	7,470	8,611	15%	0.59%
Other Surgical Specialties	1,399	1,655	18%	0.70%
Otolaryngology	828	920	11%	0.44%
Pathology	1,716	1,953	14%	0.54%
Psychiatry	6,166	6,758	10%	0.38%
Radiology	3,548	4,203	18%	0.71%
Urology	937	1,147	22%	0.85%
Primary Care	25,289	28,640	13%	0.52%
Non-Primary Care	50,200	57,949	15%	0.60%
Total	75,489	86,589	15%	0.57%

Anticipating an additional 1 percent annual growth in real gross state product, demand scenario 2 forecast that the demand for physicians would grow to 97,786 physicians in 2030. Over the forecast period, the average annual growth rate in demand scenario 2 was 1.08 percent. Since demand for non-primary care physicians was more sensitive to economic fluctuations than for demand for primary care physicians, in this scenario, demand for non-primary care physicians was forecast to grow at a significantly higher rate than demand for primary care physicians (1.21 percent compared to 0.82 percent), yielding a demand for 67,034 non-primary care physicians and 30,752 primary care physicians in 2030.

Demand scenario 3 modeled the implications of providing health insurance to the uninsured on demand for physicians. This scenario projected that the demand for physicians would grow to 90,805 physicians in 2030. Over the forecast period, the average annual growth rate in demand scenario 3 was 0.77 percent. Demand for primary care physicians was forecast to grow at a slightly slower rate than demand for non-primary care physicians (0.74 percent compared to 0.77 percent), resulting in a demand for 30,161 primary care physicians and 60,644 non-primary care physicians in 2030.

Figure 10. New York Physician Demand Forecast: Scenarios 3 and 4

Specialty	Scenario 3 Universal Health Insurance by 2020		Scenario 4 Partial Elimination of Unnecessary/ Marginally-Beneficial Services		In order to show how efforts to identify and eliminate unnecessary/marg inally- beneficial/duplica tive non-primary care services
	Anticipated Demand 2030	Average Annual Growth Rate (2006-2030)	Anticipated Demand 2030	Average Annual Growth Rate (2006-2030)	
Primary Care	30,161	0.74%	28,640	0.52%	
Non-Primary Care	60,644	0.79%	55,052	0.39%	
Total	90,805	0.77%	83,692	0.43%	

might affect the demand for physician services, demand scenario 4 forecast that the demand for physicians would grow to 83,692 physicians in 2030. Over the forecast period, the average annual growth rate in demand scenario 4 was 0.43 percent. Demand for primary care physicians was projected to grow at a slightly faster rate than demand for non-primary care physicians (0.52 percent compared to 0.39 percent), resulting in demand for 28,640 primary care and 55,692 non-primary care physicians in 2030.

New York Physician Supply and Demand Forecast Implications

There are a number of important implications of the physician supply and demand forecasts presented above. First, while New York will continue to have a substantial supply of physicians over the foreseeable future, it likely will not escape the physician shortages that the nation will experience over the next 25 years. Demand for physicians is likely to continue to grow at a faster rate than the supply of physicians between now and 2030, leading to a shortage of physicians of between 2,500 to as many as 17,000 in 2030, or between 3 percent and 15 percent of the physicians required to meet anticipated demand. The magnitude of the shortage will depend on a number of factors, including the growth of non-physician clinicians, efforts to implement universal insurance, the long-term health of the economy, and efforts to reform the health care delivery system.

Since demand was projected to grow in almost all specialties, the greatest gaps between supply and demand growth were forecast in those specialties that were losing physicians: ophthalmology, urology, psychiatry, pathology, some surgical subspecialties. Large gaps between supply and demand growth were also predicted in those specialties that were forecast to experience a period of growth, then a period of decline: general internal medicine, general/family medicine, and otolaryngology. Smaller gaps were projected in some of the specialties that were forecast to grow throughout the period as well: anesthesiology and orthopedic surgery. For other specialties that were forecast to grow throughout the period, no gaps were anticipated: radiology, general surgery. Finally, in a number of specialties, supply was forecast to grow more quickly than demand: cardiovascular diseases, emergency medicine, general pediatrics, and some internal medicine subspecialties.

Figure 11. New York Physician Supply and Demand Projected: Relationship between Supply and Demand in 2030

Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Scenario 1 Supply Baseline								
Primary Care	-2,151	-8%	-4,263	-14%	-3,672	-12%	-2,151	-8%
Non-Primary Care	-1,496	-3%	-10,581	-16%	-4,191	-7%	1,401	3%
All Physicians	-3,647	-4%	-14,844	-15%	-7,863	-9%	-750	-1%
Scenario 2a NP/PA Growth								
High								
Primary Care	2,281	8%	169	1%	760	3%	2,281	8%
Non-Primary Care	3,348	6%	-5,736	-9%	653	1%	6,246	11%
All Physicians	5,630	7%	-5,568	-6%	1,413	2%	8,527	10%
Lower								
Primary Care	-8	0%	-2,120	-7%	-1,529	-5%	-8	0%
Non-Primary Care	805	1%	-8,280	-12%	-1,890	-3%	3,702	7%
All Physicians	797	1%	-10,400	-11%	-3,419	-4%	3,694	4%
Scenario 3a Increased Physician Retention								
(33% Primary Care/67% Non-Primary Care)								
Primary Care	-1,485	-5%	-3,597	-12%	-3,006	-10%	-1,485	-5%
Non-Primary Care	-162	0%	-9,247	-14%	-2,857	-5%	2,735	5%
All Physicians	-1,647	-2%	-12,844	-13%	-5,863	-6%	1,250	1%
(25% Primary Care/75% Non-Primary Care)								
Primary Care	-1,651	-6%	-3,763	-12%	-3,172	-11%	-1,651	-6%
Non-Primary Care	4	0%	-9,081	-14%	-2,691	-4%	2,901	5%
All Physicians	-1,647	-2%	-12,844	-13%	-5,863	-6%	1,250	1%
(20% Primary Care/80% Non-Primary Care)								
Primary Care	-1,751	-6%	-3,863	-13%	-3,272	-11%	-1,751	-6%
Non-Primary Care	104	0%	-8,981	-13%	-2,591	-4%	3,001	5%
All Physicians	-1,647	-2%	-12,844	-13%	-5,863	-6%	1,250	1%
Scenario 3b Decreased Physician Retention								
(33% Primary Care/67% Non-Primary Care)								
Primary Care	-2,817	-10%	-4,929	-16%	-4,338	-14%	-2,817	-10%
Non-Primary Care	-2,830	-5%	-11,915	-18%	-5,525	-9%	67	0%
All Physicians	-5,647	-7%	-16,844	-17%	-9,863	-11%	-2,750	-3%
(25% Primary Care/75% Non-Primary Care)								
Primary Care	-2,651	-9%	-4,763	-15%	-4,172	-14%	-2,651	-9%
Non-Primary Care	-2,996	-5%	-12,081	-18%	-5,691	-9%	-99	0%
All Physicians	-5,647	-7%	-16,844	-17%	-9,863	-11%	-2,750	-3%
(20% Primary Care/80% Non-Primary Care)								
Primary Care	-2,551	-9%	-4,663	-15%	-4,072	-14%	-2,551	-9%
Non-Primary Care	-3,096	-5%	-12,181	-18%	-5,791	-10%	-199	0%
All Physicians	-5,647	-7%	-16,844	-17%	-9,863	-11%	-2,750	-3%

Second, the anticipated shortages will be experienced in both primary care and non-primary care specialties. Even with a significant shift of interest in non-primary care specialties among new physicians in the past decade, shortages of non-primary care specialists are anticipated. The supply of non-primary care physicians is likely to grow at about 0.6 percent annually, while demand for non-primary care physicians may grow at 1.0 percent or more annually. At the same time, while the supply of primary care physicians is likely to grow at an

even slower rate, demand for primary care physicians is also likely grow somewhat more slowly than demand for non-primary care physicians.

Third, two factors affecting New York give the state a somewhat more positive outlook than other parts of the country and the nation as a whole. First, the state has an enormous medical education and training infrastructure in place that continues to produce a large pool of new physicians. Second, since the state's population is projected to grow at a much slower rate and age more slowly than the rest of the country, physician demand is likely to grow more slowly in New York compared to other parts of the country. While these factors mitigate the likely physician shortage to a certain extent, they are not enough to completely eradicate it. Moreover, since the physician shortage may not be as great in New York as it is in other states, the state will be an even more attractive source of physicians than it already is. Thus, policies, such as *Doctors Across New York*, designed to improve the retention of physicians currently practicing in the state and those who are trained here will be even more critical in the years ahead and should be afforded continued support from stakeholders statewide.

Finally, since non-physician clinicians are growing at a faster rate than physicians, they will also be able to shoulder some of the increasing physician demand burden. However, it is not certain that the rate of growth among non-physician clinicians will remain as high as it has been recently. To the extent that their growth does slow, this group of practitioners, while still contributing important services, will not be able to completely eradicate the anticipated shortage.

Regional Outlook

With regard to forecast regional supply and demand gaps, the greatest gaps were projected in regions where demand was forecast to grow most rapidly. New York City and the Hudson Valley, in particular, were forecast to experience the greatest gaps between physician supply and demand in 2030. In those regions, the gaps between physician supply and demand approached 10 percent, with some specialties (e.g., urology, pathology, and ophthalmology) forecast to experience gaps greater than 33 percent, and adult primary care physician supply and demand gaps of greater than 12 percent. On the other hand, while no region of the state was immune to physician supply and demand gaps, physician supply growth was forecast to more closely parallel physician demand growth in the Capital District and the North Country regions.

In addition to the scenarios described above, an additional parameter was manipulated in the regional forecasts: the effect of changes in anticipated demand on physicians' practice location decisions. The first regional supply forecast assumed that the geographic distribution of physicians in the state would remain constant over the forecast period; that is, changes in the regional distribution of demand would have no effect on physicians' practice location decisions. The second regional supply forecast assumed that the geographic distribution of physicians in the state would be responsive to anticipated changes in demand; that is, physicians would move into areas at a greater rate where physician demand is growing and leave areas at a greater rate where demand is declining or not growing as quickly as in other regions.

An examination of the forecasts under these two assumptions yielded several important observations. First, if physicians' practice location decisions were to perfectly respond to the anticipated changes in demand, in the regions with the more extreme forecast gaps between supply and demand (e.g., New York City), gaps would be smaller. However, there would be a trade off: some regions in which the physician supply was projected to be adequate (e.g., Mohawk Valley) or somewhat oversupplied (e.g., Western New York) in 2030 would lose physicians and potentially face shortages of physicians. Moreover, in some areas (e.g., Hudson Valley and Capital District), if physicians were to respond to changes in the geographic distribution of demand, shortages would be exacerbated.

These findings suggest that the solutions to the forecast physician supply and demand gaps in the state cannot rely on the market alone. Rather, the solutions will have to include the intervention of public and private stakeholders.

Limitations

The findings presented in this summary are subject to a number of limitations that should be considered prior to developing policy based upon them.

Nature of Forecasting

In general, as with all forecasting endeavors, the forecasts of physician supply and demand presented here are constructed on a foundation of assumptions. These assumptions are associated with the factors that determine physician supply and demand (e.g., number of new entrants into the New York physician workforce; age-, gender-, location-, insurance status-specific physician utilization rates; estimated elasticities of physician demand to economic change; and so forth). To the extent these assumptions fail to hold over the forecast period, the accuracy of the forecasts will suffer. However, the assumptions made were based upon historical data and, where available, New York-specific data. Moreover, the construction of multiple scenarios that allow for variation in some of the key assumptions of the forecasting models mitigates the risk of inaccuracy due to ill-chosen assumptions.

Another way to consider the forecasts in this report is to think of them as illustrative of what the future might hold under a specific set of conditions. For example, in one of the demand scenarios developed for this report, it was assumed that five percent of non-primary care services would be identified as unnecessary/marginally-beneficial/duplicative services and would be eliminated by 2030. How likely is it that the health care system will change enough for this assumption to hold true? At this point in time, it is not clear. However, the scenario developed with this assumption does illustrate the effect on demand for physicians in such an environment. Thus, one could use this information to know what the effect might be should some portion of these services be eliminated. The same could be said for any of the assumptions made in these forecasts.

Potential Feedback

The findings presented here also do not take into account the potential feedback effects resulting from the predicted national physician shortage or the predicted physician shortage in New York. For example, the predicted shortage of cardiologists nationally may influence young physicians to select cardiology as a practice specialty at a higher rate than the forecast models assume. Moreover, in response to a widespread shortage of physicians, current practitioners may delay retirement. Further, if demand for physicians was to decrease as sharply as the scenarios in which unnecessary services were eliminated, it is likely that supply would respond by growing at a slower same rate than forecast, reducing the imbalances suggested by the models. There is a nearly infinite list of other potential feedback effects in response to physician shortages that could affect supply and demand in the future.

Similarly, the findings presented in this summary do not fully take into account policy changes that might be wrought as a result of the publication of the findings. While national policies around the physician workforce do not appear to have been affected greatly by the federal COGME's *Sixteenth Report* yet, state-level initiatives have begun to respond to the predicted shortage of physicians. With a reported shortages worsening in many states, it is likely that competition for physicians among states will increase. In the same way states compete feverishly for new businesses and their accompanying jobs, they are acting similarly with regard to physician

recruitment. The nature of this competition is likely to have ramifications for the relationship between physician supply and demand in New York that is not accounted for completely in the current forecasting models.

Forward Looking Forecasts

Finally, this report does not attempt to determine the extent to which there are current shortages of physicians in the state. Rather, it is forward-looking, focused on trends in the growth rates of physician supply and demand under a number of potential scenarios. An assessment of the current adequacy would require a radically different approach, including the construction of rational services areas, small area analyses, health status indicators, and the involvement of local provider agencies, among other things.⁸ The purpose of the current assessment is to provide information for the higher-level, broader policy community and offer a context within which to develop targeted policies and programs.

⁸ Such an assessment is currently being conducted by the Center for Health Workforce Studies and the Community Health Center Association of New York State with support from the New York State Department of Health.

Capital District

Physician Supply and Demand Outlook 2006-2030



Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Supply Baseline								
Supply unresponsive to demand								
Primary Care	-30	-3%	-110	-9%	-82	-7%	-30	-3%
Non-Primary Care	11	0%	-348	-13%	-91	-4%	127	6%
All Physicians	-18	-1%	-459	-12%	-174	-5%	97	3%
Supply responsive to demand								
Primary Care	-83	-8%	-163	-14%	-135	-12%	-83	-8%
Non-Primary Care	-50	-2%	-410	-15%	-153	-6%	65	3%
All Physicians	-133	-4%	-574	-15%	-289	-8%	-18	-1%

In the Capital District region, assuming physician location would not respond to changes in demand, the anticipated number of physicians in 2030 was forecast to be 3,377. Under the baseline supply scenario, anticipated demand for physicians would grow to 3,395, yielding a deficit of 18 physicians (1 percent) by 2030. The deficit was forecast to be entirely among the primary care specialties. This scenario suggests that the supply of non-primary care specialties would be sufficient to meet demand, perhaps exceeding demand slightly (less than 1 percent).

Assuming an additional 1 percent economic growth annually, the anticipated demand for physicians was forecast to be 3,835, yielding a deficit of more than 450 physicians (12 percent) by 2030. Since non-primary care specialty demand is more sensitive to economic fluctuations than primary care specialty demand, in this scenario, the deficit was forecast to be greater for non-primary care specialties than primary care specialties (13 percent compared to 9 percent, respectively). Assuming universal health insurance was completely implemented by 2020, the anticipated demand for physicians was forecast to be 3,550, yielding a deficit of 174 physicians (5 percent) by 2030. In this scenario, primary care specialties were forecast to experience greater deficits than non-primary care specialties (7 percent compared to 4 percent). In the scenario that assumed that 5 percent of non-primary services would be identified as unnecessary, of marginal benefit, or duplicative and would be eliminated, the Capital District region was forecast to have a 127 physician excess (6 percent) in 2030.

On the other hand, assuming that physician location would respond to changes in demand, it was forecast that the Capital District region would have 3,262 physicians in 2030, having peaked at slightly more than 3,300 physicians in 2020. The anticipated number of physicians in this scenario was lower than in the unresponsive forecast due to the projected population decline in the region over the forecast period and associated slower rate of demand growth relative to other parts of the state. This forecast yielded a deficit of 133 physicians (4 percent) by 2030. The deficit was forecast to be greater for primary care specialties than non-primary care specialties (8 percent compared to 2 percent, respectively). Moreover, because demand in other regions was forecast to grow more quickly than in the Capital District region, the physician supply and demand deficits forecast under the other demand scenarios were also larger than if physician practice location decisions were not responsive to changes in demand.

The Capital District region includes the following counties: Albany, Columbia, Greene, Rensselaer, Saratoga, Schenectady, Warren, and Washington.

Central New York

Physician Supply and Demand Outlook 2006-2030



Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Supply Baseline								
Supply unresponsive to demand								
Primary Care	38	6%	-10	-1%	7	1%	38	6%
Non-Primary Care	218	14%	-25	-1%	147	9%	296	20%
All Physicians	256	12%	-34	-1%	155	7%	334	16%
Supply responsive to demand								
Primary Care	-44	-7%	-92	-13%	-75	-11%	-44	-7%
Non-Primary Care	-30	-2%	-273	-15%	-101	-6%	48	3%
All Physicians	-74	-3%	-365	-15%	-176	-8%	4	0%

In the Central New York region, assuming physician location would not respond to changes in demand, the anticipated number of physicians in 2030 was forecast to be 2,466. Under the baseline supply scenario, anticipated demand for physicians would grow to 2,210, yielding an excess of 256 physicians (12 percent) by 2030. The excess was forecast to be greater among the primary care specialties than primary care specialties (14 percent compared to 6 percent, respectively).

Assuming an additional 1 percent economic growth annually, the anticipated demand for physicians was forecast to be 2,500, yielding a deficit of 34 physicians (1 percent) by 2030. The deficit was forecast to be about the same among primary care specialties as non-primary care specialties (1 percent). Assuming universal health insurance was completely implemented by 2020, the anticipated demand for physicians was forecast to be 2,312, yielding an excess of 155 physicians (7 percent) by 2030. In this scenario, non-primary care specialties were forecast to experience a greater excess than primary care specialties (9 percent compared to 1 percent). In the scenario that assumed that 5 percent of non-primary services would be identified as unnecessary, of marginal benefit, or duplicative and would be eliminated, the Central New York region was forecast to have a 334 physician excess (16 percent) in 2030.

On the other hand, assuming that physician location would respond to changes in demand, it was forecast that the Central New York region would have 2,136 physicians in 2030, having peaked at more than 2,270 physicians in 2015. The anticipated number of physicians in this scenario was lower than in the unresponsive forecast due to the projected population decline in the region over the forecast period and associated slower rate of demand growth relative to other parts of the state. This forecast yielded a deficit of 74 physicians (3 percent) by 2030. The deficit was forecast to be greater for primary care specialties than non-primary care specialties (7 percent compared to 2 percent, respectively). Moreover, because demand in other regions was forecast to grow more quickly than in the Central New York region, the physician supply and demand deficits forecast under the other demand scenarios were also larger than if physician practice location decisions were not responsive to changes in demand.

The Central New York region includes the following counties: Cayuga, Cortland, Onondaga, and Oswego.

Finger Lakes

Physician Supply and Demand Outlook 2006-2030



Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Supply Baseline								
Supply unresponsive to demand								
Primary Care	-32	-2%	-137	-9%	-106	-7%	-32	-2%
Non-Primary Care	144	5%	-278	-9%	18	1%	279	11%
All Physicians	111	3%	-414	-9%	-88	-2%	247	6%
Supply responsive to demand								
Primary Care	-107	-8%	-211	-14%	-180	-12%	-107	-8%
Non-Primary Care	-37	-1%	-459	-15%	-163	-6%	98	4%
All Physicians	-144	-3%	-670	-14%	-343	-8%	-9	0%

In the Finger Lakes region, assuming physician location would not respond to changes in demand, the anticipated number of physicians in 2030 was forecast to be 4,229. Under the baseline supply scenario, anticipated demand for physicians would grow to 4,118, yielding an excess of 111 physicians (3 percent) by 2030. The excess was forecast to be entirely among the non-primary care specialties. In fact, among primary care specialties, a deficit of 32 physicians (2 percent) was forecast by 2030.

Assuming an additional 1 percent economic growth annually, the anticipated demand for physicians was forecast to be 4,644, yielding a deficit of more than 400 physicians (9 percent) by 2030. The deficit was forecast to be about the same among primary care specialties as non-primary care specialties (9 percent). Assuming universal health insurance was completely implemented by 2020, the anticipated demand for physicians was forecast to be 4,317, yielding a deficit of 88 physicians (2 percent) by 2030. In this scenario, primary care specialties were forecast to experience greater deficits than non-primary care specialties (7 percent compared to 1 percent, respectively). In the scenario that assumed that 5 percent of non-primary services would be identified as unnecessary, of marginal benefit, or duplicative and would be eliminated, the Finger Lakes region was forecast to have a 127 physician excess (6 percent) in 2030.

On the other hand, assuming that physician location would respond to changes in demand, it was forecast that the Finger Lakes region would have 3,974 physicians in 2030, having peaked at more than 4,000 physicians in 2020. The anticipated number of physicians in this scenario was lower than in the unresponsive forecast due to the projected population decline in the region over the forecast period and associated slower rate of demand growth relative to other parts of the state. This forecast yielded a deficit of 144 physicians (4 percent) by 2030. The deficit was forecast to be greater for primary care specialties than non-primary care specialties (8 percent compared to 1 percent, respectively). Moreover, because demand in other regions was forecast to grow more quickly than in the Finger Lakes region, the physician supply and demand deficits forecast under the other demand scenarios were also larger than if physician practice location decisions were not responsive to changes in demand.

The Finger Lakes region includes the following counties: Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming, and Yates.

Hudson Valley

Physician Supply and Demand Outlook 2006-2030



Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Supply Baseline								
Supply unresponsive to demand								
Primary Care	-225	-7%	-457	-14%	-391	-12%	-225	-7%
Non-Primary Care	-213	-3%	-1,201	-17%	-507	-8%	101	2%
All Physicians	-438	-5%	-1,658	-16%	-898	-9%	-124	-1%
Supply responsive to demand								
Primary Care	-226	-7%	-458	-14%	-392	-12%	-226	-7%
Non-Primary Care	-266	-4%	-1,254	-17%	-560	-9%	47	1%
All Physicians	-492	-5%	-1,713	-16%	-952	-10%	-179	-2%

In the Hudson Valley region, assuming physician location would not respond to changes in demand, the anticipated number of physicians in 2030 was forecast to be 8,977. Under the baseline supply scenario, anticipated demand for physicians would grow to 9,415, yielding a deficit of 438 physicians (5 percent) by 2030. The deficit was forecast to be greater among the primary care specialties than among non-primary care specialties (7 percent compared to 3 percent, respectively).

Assuming an additional 1 percent economic growth annually, the anticipated demand for physicians was forecast to be 10,635, yielding a deficit of more than 1,600 physicians (16 percent) by 2030. Since non-primary care specialty demand is more sensitive to economic fluctuations than primary care specialty demand, in this scenario, the deficit was forecast to be greater for non-primary care specialties than primary care specialties (17 percent compared to 14 percent, respectively). Assuming universal health insurance was completely implemented by 2020, the anticipated demand for physicians was forecast to be 9,875, yielding a deficit of 898 physicians (9 percent) by 2030. In this scenario, primary care specialties were forecast to experience greater deficits than non-primary care specialties (12 percent compared to 8 percent, respectively). In the scenario that assumed that 5 percent of non-primary services would be identified as unnecessary, of marginal benefit, or duplicative and would be eliminated, the Hudson Valley region was forecast to have a 124 physician shortage (1 percent) in 2030.

On the other hand, assuming that physician location would respond to changes in demand, it was forecast that the Hudson Valley region would have 8,923 physicians in 2030, having peaked at more than 8,950 physicians in 2025. The anticipated number of physicians in this scenario was slightly lower than in the unresponsive forecast due to the region's projected population growth rate over the forecast period and associated slower rate of demand growth relative to the New York City region. This forecast yielded a deficit of 492 physicians (5 percent) by 2030. The deficit was forecast to be greater for primary care specialties than non-primary care specialties (7 percent compared to 4 percent, respectively). Moreover, because demand in other regions was forecast to grow about the same rate as in the Hudson Valley region, the physician supply and demand deficits forecast under the other demand scenarios were also about the same as were forecast if physician practice location decisions were not responsive to changes in demand.

The Hudson Valley region includes the following counties: Dutchess, Orange, Putnam, Rockland, Sullivan, Ulster, and Westchester.

Long Island

Physician Supply and Demand Outlook 2006-2030



Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Supply Baseline								
Supply unresponsive to demand								
Primary Care	-18	0%	-285	-7%	-205	-5%	-18	0%
Non-Primary Care	369	4%	-950	-10%	-25	0%	789	10%
All Physicians	352	3%	-1,235	-9%	-230	-2%	771	7%
Supply responsive to demand								
Primary Care	-242	-7%	-510	-13%	-430	-11%	-242	-7%
Non-Primary Care	-141	-2%	-1,460	-15%	-535	-6%	278	3%
All Physicians	-384	-3%	-1,970	-14%	-965	-8%	36	0%

In the Long Island region, assuming physician location would not respond to changes in demand, the anticipated number of physicians in 2030 was forecast to be 12,370. Under the baseline supply scenario, anticipated demand for physicians would grow to 12,018, yielding an excess of 352 physicians (3 percent) by 2030. The excess was forecast to be entirely among the non-primary care specialties. In fact, among primary care specialties, a deficit of 18 physicians (less than 1 percent) was forecast by 2030.

Assuming an additional 1 percent economic growth annually, the anticipated demand for physicians was forecast to be 13,605, yielding a deficit of more than 1,200 physicians (9 percent) by 2030. Since non-primary care specialty demand is more sensitive to economic fluctuations than primary care specialty demand, in this scenario, the deficit was forecast to be greater for non-primary care specialties than primary care specialties (10 percent compared to 7 percent, respectively). Assuming universal health insurance was completely implemented by 2020, the anticipated demand for physicians was forecast to be 12,600, yielding a deficit of 230 physicians (2 percent) by 2030. In this scenario, primary care specialties were forecast to experience greater deficits than non-primary care specialties (5 percent compared to less than 1 percent, respectively). In the scenario that assumed that 5 percent of non-primary services would be identified as unnecessary, of marginal benefit, or duplicative and would be eliminated, the Long Island region was forecast to have a 771 physician excess (7 percent) in 2030.

On the other hand, assuming that physician location would respond to changes in demand, it was forecast that the Long Island region would have 11,364 physicians in 2030, having peaked at slightly fewer than 11,800 physicians in 2020. The anticipated number of physicians in this scenario was lower than in unresponsive forecast due to the projected population decline in the region over the forecast period and associated slower rate of demand growth relative to other parts of the state. This forecast yielded a deficit of 384 physicians (3 percent) by 2030. The deficit was forecast to be greater for primary care specialties than non-primary care specialties (7 percent compared to 2 percent, respectively). Moreover, because demand in other regions was forecast to grow more quickly than in the Long Island region, the physician supply and demand deficits forecast under the other demand scenarios were also larger than if physician practice location decisions were not responsive to changes in demand.

Long Island includes the following counties: Nassau and Suffolk.

Mohawk Valley

Physician Supply and Demand Outlook 2006-2030



Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Supply Baseline								
Supply unresponsive to demand								
Primary Care	8	2%	-19	-5%	-9	-2%	8	2%
Non-Primary Care	44	9%	-36	-6%	20	4%	69	14%
All Physicians	52	6%	-55	-6%	12	1%	77	9%
Supply responsive to demand								
Primary Care	-33	-9%	-61	-15%	-50	-13%	-33	-9%
Non-Primary Care	-19	-4%	-99	-17%	-43	-8%	6	1%
All Physicians	-52	-6%	-159	-16%	-93	-10%	-27	-3%

In the Mohawk Valley region, assuming physician location would not respond to changes in demand, the anticipated number of physicians in 2030 was forecast to be 933, having peaked at slightly fewer than 940 physicians in 2025. Under the baseline supply scenario, anticipated demand for physicians would grow to 881, yielding an excess of 52 physicians (6 percent) by 2030. The excess was forecast to be greater among the non-primary care specialties than among primary care specialties (9 percent compared to 2 percent, respectively).

Assuming an additional 1 percent economic growth annually, the anticipated demand for physicians was forecast to be 988, yielding a deficit of 55 physicians (6 percent) by 2030. Since non-primary care specialty demand is more sensitive to economic fluctuations than primary care specialty demand, in this scenario, the deficit was forecast to be slightly greater for non-primary care specialties than primary care specialties (6 percent compared to 5 percent, respectively). Assuming universal health insurance was completely implemented by 2020, the anticipated demand for physicians was forecast to be 921, yielding an excess of 12 physicians (1 percent) by 2030. However, in this scenario, primary care specialties were forecast to experience a 9 physician deficit (2 percent). In the scenario that assumed that 5 percent of non-primary services would be identified as unnecessary, of marginal benefit, or duplicative and would be eliminated, the Mohawk Valley region was forecast to have a 77 physician excess (9 percent) in 2030.

On the other hand, assuming that physician location would respond to changes in demand, it was forecast that the Mohawk Valley region would have 829 physicians in 2030, having peaked at slightly more than 880 physicians in 2015. The anticipated number of physicians in this scenario was lower than in the unresponsive forecast due to the projected population decline in the region over the forecast period and associated slower rate of demand growth relative to other parts of the state. This forecast yielded a deficit of 52 physicians (6 percent) by 2030. The deficit was forecast to be greater for primary care specialties than non-primary care specialties (9 percent compared to 4 percent, respectively). Moreover, because demand in other regions was forecast to grow more quickly than in the Mohawk Valley region, the physician supply and demand deficits forecast under the other demand scenarios were also larger than if physician practice location decisions were not responsive to changes in demand.

Mohawk Valley includes the following counties: Fulton, Herkimer, Madison, Montgomery, Oneida, and Schoharie.

New York City

Physician Supply and Demand Outlook 2006-2030



Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Supply Baseline								
Supply unresponsive to demand								
Primary Care	-1,972	-12%	-3,153	-18%	-2,851	-17%	-1,972	-12%
Non-Primary Care	-2,593	-8%	-7,610	-21%	-4,086	-12%	-995	-3%
All Physicians	-4,565	-10%	-10,763	-20%	-6,938	-14%	-2,967	-6%
Supply responsive to demand								
Primary Care	-1,223	-8%	-2,404	-14%	-2,103	-12%	-1,223	-8%
Non-Primary Care	-884	-3%	-5,901	-16%	-2,378	-7%	713	2%
All Physicians	-2,108	-4%	-8,306	-15%	-4,481	-9%	-510	-1%

In the New York City region, assuming physician location would not respond to changes in demand, the anticipated number of physicians in 2030 was forecast to be 43,394. Under the baseline supply scenario, anticipated demand for physicians would grow to 47,959, yielding a deficit of more than 4,500 physicians (10 percent) by 2030. The deficit was forecast to be greater among the primary care specialties than among non-primary care specialties (12 percent compared to 8 percent, respectively).

Assuming an additional 1 percent economic growth annually, the anticipated demand for physicians was forecast to be 54,157, yielding a deficit of more than 10,000 physicians (20 percent) by 2030. Since non-primary care specialty demand is more sensitive to economic fluctuations than primary care specialty demand, in this scenario, the deficit was forecast to be greater for non-primary care specialties than primary care specialties (21 percent compared to 18 percent, respectively). Assuming universal health insurance was completely implemented by 2020, the anticipated demand for physicians was forecast to be 50,332, yielding a deficit of more than 6,900 physicians (14 percent) by 2030. In this scenario, primary care specialties were forecast to experience greater deficits than non-primary care specialties (17 percent compared to 12 percent, respectively). In the scenario that assumed that 5 percent of non-primary services would be identified as unnecessary, of marginal benefit, or duplicative and would be eliminated, the New York City region was forecast to have a 2,967 physician deficit (6 percent) in 2030.

On the other hand, assuming that physician location would respond to changes in demand, it was forecast that the New York City region would have 45,851 physicians in 2030. The anticipated number of physicians in this scenario was higher than in the unresponsive forecast due to the projected higher than average population growth in the region over the forecast period and associated faster rate of demand growth relative to other parts of the state. This forecast yielded a deficit of more than 2,100 physicians (4 percent) by 2030. The deficit was forecast to be greater for primary care specialties than non-primary care specialties (8 percent compared to 3 percent, respectively). Moreover, because demand in the region was forecast to grow more quickly than in other parts of the state, the physician supply and demand deficits forecast under the other demand scenarios were smaller than if physician practice location decisions were not responsive to changes in demand.

New York City includes the following counties: Bronx, Kings, New York, Queens, and Richmond.

North Country

Physician Supply and Demand Outlook 2006-2030



Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Supply Baseline								
Supply unresponsive to demand								
Primary Care	-21	-7%	-44	-13%	-36	-11%	-21	-7%
Non-Primary Care	15	3%	-64	-10%	-6	-1%	42	8%
All Physicians	-7	-1%	-108	-11%	-41	-5%	20	2%
Supply responsive to demand								
Primary Care	-23	-8%	-45	-14%	-37	-12%	-23	-8%
Non-Primary Care	4	1%	-75	-12%	-17	-3%	31	6%
All Physicians	-19	-2%	-120	-13%	-54	-6%	8	1%

In the North Country region, assuming physician location would not respond to changes in demand, the anticipated number of physicians in 2030 was forecast to be 832. Under the baseline supply scenario, anticipated demand for physicians would grow to 839, yielding a very small deficit of 7 physicians (1 percent) by 2030. The deficit was forecast to be entirely among the primary care specialties. This scenario suggests that the supply of non-primary care specialties would be sufficient to meet demand, perhaps exceeding demand slightly (3 percent).

Assuming an additional 1 percent economic growth annually, the anticipated demand for physicians was forecast to be 940, yielding a deficit of more than 100 physicians (11 percent) by 2030. In this scenario, the deficit was forecast to be greater for primary care specialties than non-primary care specialties (13 percent compared to 10 percent, respectively). Assuming universal health insurance was completely implemented by 2020, the anticipated demand for physicians was forecast to be 874, yielding a deficit of 41 physicians (5 percent) by 2030. In this scenario, primary care specialties were forecast to experience greater deficits than non-primary care specialties (11 percent compared to 1 percent). In the scenario that assumed that 5 percent of non-primary services would be identified as unnecessary, of marginal benefit, or duplicative and would be eliminated, the North Country region was forecast to have a 20 physician excess (2 percent) in 2030. However, a 21 primary care physician deficit (7 percent) would remain under this scenario.

On the other hand, assuming that physician location would respond to changes in demand, it was forecast that the North Country region would have 820 physicians in 2030. The anticipated number of physicians in this scenario was slightly lower than in the unresponsive forecast due to the region's projected population growth rate over the forecast period and associated slower rate of demand growth relative to the New York City region. This forecast yielded a deficit of 19 physicians (2 percent) by 2030. The deficit was forecast to be entirely among the primary care specialties. This scenario suggests that the supply of non-primary care specialties would be sufficient to meet demand, perhaps exceeding demand (3 percent). Moreover, because demand in the region was forecast to grow a bit less quickly than in the New York City region, the physician supply and demand deficits forecast under the other demand scenarios were slightly larger than if physician practice location decisions were not responsive to changes in demand.

North Country includes the following counties: Clinton, Essex, Franklin, Hamilton, Jefferson, Lewis, and St. Lawrence.

Southern Tier

Physician Supply and Demand Outlook 2006-2030



Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Supply Baseline								
Supply unresponsive to demand								
Primary Care	-2	0%	-54	-7%	-36	-5%	-2	0%
Non-Primary Care	90	7%	-95	-7%	36	3%	150	13%
All Physicians	88	5%	-149	-7%	0	0%	148	8%
Supply responsive to demand								
Primary Care	-64	-9%	-116	-15%	-99	-13%	-64	-9%
Non-Primary Care	-23	-2%	-208	-15%	-76	-6%	37	3%
All Physicians	-87	-5%	-325	-15%	-175	-9%	-27	-1%

In the Southern Tier region, assuming physician location would not respond to changes in demand, the anticipated number of physicians in 2030 was forecast to be 1,995. Under the baseline supply scenario, anticipated demand for physicians would grow to 1,907, yielding an excess of 88 physicians (5 percent) by 2030. The excess was forecast to be entirely among the non-primary care specialties. This scenario suggests that the supply of primary care specialties would be nearly sufficient to meet demand, with demand exceeding supply only slightly (less than 1 percent).

Assuming an additional 1 percent economic growth annually, the anticipated demand for physicians was forecast to be 2,144, yielding a deficit of almost 150 physicians (7 percent) by 2030. The deficit was forecast to be about the same among primary care specialties as non-primary care specialties (7 percent). Assuming universal health insurance was completely implemented by 2020, the anticipated demand for physicians was forecast to be 1,995, yielding a sufficient number of physicians by 2030. However, in this scenario, primary care specialties were forecast to experience a deficit (5 percent), while non-primary care specialties were forecast to experience a surplus (3 percent). In the scenario that assumed that 5 percent of non-primary services would be identified as unnecessary, of marginal benefit, or duplicative and would be eliminated, the Southern Tier region was forecast to have a 148 physician excess (8 percent) in 2030.

On the other hand, assuming that physician location would respond to changes in demand, it was forecast that the Southern Tier region would have 1,820 physicians in 2030, having peaked at slightly fewer than 1,890 physicians in 2015. The anticipated number of physicians in this scenario was lower than in the unresponsive forecast due to the projected population decline in the region over the forecast period and associated slower rate of demand growth relative to other parts of the state. This forecast yielded a deficit of 87 physicians (5 percent) by 2030. The deficit was forecast to be greater for primary care specialties than non-primary care specialties (9 percent compared to 2 percent, respectively). Moreover, because demand in other regions was forecast to grow more quickly than in the Southern Tier, the physician supply and demand deficits forecast under the other demand scenarios were also larger than if physician practice location decisions were not responsive to changes in demand.

Southern Tier includes the following counties: Broome, Chemung, Chenango, Delaware, Otsego, Schuyler, Steuben, Tioga, and Tompkins.

Western New York

Physician Supply and Demand Outlook 2006-2030



Specialty	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/ Marginally-Beneficial/ Duplicative Services	
	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030	Difference Between Supply and Demand 2030	Percentage of Anticipated Demand 2030
Supply Baseline								
Supply unresponsive to demand								
Primary Care	102	8%	5	0%	36	3%	102	8%
Non-Primary Care	418	17%	25	1%	302	11%	545	23%
All Physicians	521	14%	30	1%	338	8%	647	17%
Supply responsive to demand								
Primary Care	-105	-8%	-202	-14%	-171	-12%	-105	-8%
Non-Primary Care	-48	-2%	-442	-15%	-164	-6%	78	3%
All Physicians	-153	-4%	-644	-15%	-336	-8%	-27	-1%

In the Western New York region, assuming physician location would not respond to changes in demand, the anticipated number of physicians in 2030 was forecast to be 4,368. Under the baseline demand scenario, anticipated demand for physicians would decline to 3,847, yielding an excess of 521 physicians (14 percent) by 2030. The excess was forecast to be greater for non-primary care specialties than primary care specialties (17 percent compared to 8 percent, respectively).

Assuming an additional 1 percent economic growth annually, the anticipated demand for physicians was forecast to grow to 4,338, yielding an excess of 30 physicians (1 percent) by 2030. The excess was forecast to be slightly greater for non-primary care specialties than primary care specialties (1 percent compared to less than 1 percent, respectively). Assuming universal health insurance was completely implemented by 2020, the anticipated demand for physicians was forecast to grow to 4,030, yielding an excess of 338 physicians (8 percent) by 2030. In this scenario, non-primary care specialties were forecast to experience greater excess than primary care specialties (11 percent compared to 3 percent). In the scenario that assumed that 5 percent of non-primary services would be identified as unnecessary, of marginal benefit, or duplicative and would be eliminated, the Western New York region was forecast to have a 647 physician excess (17 percent) in 2030.

On the other hand, assuming that physician location would respond to changes in demand, it was forecast that the Western New York region would have 3,694 physicians in 2030, having peaked at slightly fewer than 4,000 physicians in 2010. The anticipated number of physicians in this scenario was lower than in the unresponsive forecast due to the projected population decline in the region over the forecast period and associated slower rate of demand growth relative to other parts of the state. This forecast yielded a deficit of 153 physicians (4 percent) by 2030. The deficit was forecast to be greater for primary care specialties than non-primary care specialties (8 percent compared to 2 percent, respectively). Moreover, because demand in other regions was forecast to grow or decline more slowly than in the Western New York region, the physician supply and demand deficits forecast under the other demand scenarios were also larger than if physician practice location decisions were not responsive to changes in demand.

Western New York includes the following counties: Allegany, Cattaraugus, Chautauqua, Erie, and Niagara.

Chapter 1: Overview

An adequate supply and distribution of physicians is an essential component of an effective health care system. While there is no simple ratio to determine how many physicians a nation, state, or region should have, it is possible to evaluate the adequacy of physician supply of a particular geographic area by applying supply and demand models that inform physician workforce decisions. Due to the length of time and great expense required for physician education and training, it is prudent to anticipate likely physician supply and demand imbalances well in advance of their potential occurrence. To that end, the Center for Health Workforce Studies has conducted an assessment of the future supply and demand for physicians in New York through 2030. The goal of the assessment is to identify future physician supply and demand imbalances and suggest strategies for reconciling those imbalances. This report highlights the main findings of the Center's physician supply and demand forecasts.

This report, detailing the results of the Center's assessment of the physician workforce in New York, is organized as follows:

1) Demographic, Economic, and Health Status Profile of New York

Population, demographic, economic, and health status information about New York was obtained from a variety of sources including the U.S. Census Bureau, Claritas, and Cornell University's Program on Applied Demographics (population projections and characteristics); the Centers for Disease Control and Prevention's Behavioral Risk Factor Surveillance System (health status indicators); the Area Resource File (health care utilization estimates); the U.S. Census Bureau, the Urban Institute, and the Kaiser Commission on Medicaid and the Uninsured (insurance status indicators); and Woods and Poole Economics, Inc (economic projections).

2) Current New York Physician Workforce Profile

Using data collected on a continuous basis by the Center with assistance from the New York State Education Department and the New York State Department of Health, the Center developed a profile of the current patient care physicians in the state. The profile includes the demographic characteristics (age, gender, race/ethnicity); professional activities (patient care, teaching, research, administration); practice characteristics (specialty, setting, board certification, location of education and training); and county-level and regional distributions of physicians currently practicing in New York. More detailed information by specialty, region, and county is published annually by the Center in a stand-alone profile of physicians in the state: *Annual New York Physician Profile*. The latest edition is available on the Center's Web site.

3) New York Medical Education and Training Profile

The medical education and training profile presents data on medical education and training efforts and outcomes in New York compiled from the AMA's Graduate Medical Education Database, as well as historical trend data from the *Journal of the American Medical Association's* Annual Medical Education theme issues, and the American Association of Colleges of Osteopathic Medicine. Additional data on the outcomes of graduate medical education in the state are distributed annually by the Center in: *New York Residency Training Outcomes: A Summary of Responses to the New York Resident Exit Survey*. The latest report is available on the Center's Web site.

4) New York Physician Supply and Demand Forecasts through 2030

In this section of the report, the Center's efforts to forecast physician supply and demand in New York through 2030 are presented. The supply and demand forecasts include state-level, regional-level, and specialty-specific projections. In addition, descriptions of the models employed to generate the forecasts are provided. In order to provide a meaningful context to interpret the models and their results, the chapter also includes a broader discussion of the factors affecting physician supply and demand. The forecasting results are presented in three chapters (Chapters 7 through 9), one on the supply forecasts, one on the demand forecasts, and one summarizing the comparisons of the supply and demand forecasts.

5) Regional Physician Supply and Demand Forecasts through 2030

Detailed regional specialty-specific physician supply and demand forecasts generated for this project have been included as an appendix that can be downloaded from the Center's Web site.

Chapter 2: Background

Physician Supply and Demand Forecasting in the U.S.

Nearly 30 years ago, the Graduate Medical Education National Advisory Committee (GMENAC) predicted the nation would possess a relatively large surplus of physicians by the turn of the century.⁹ This prediction was made following a 20-year expansion in medical education capacity in the U.S., where the number of annual medical school graduates more than doubled. After the GMENAC report, allopathic medical schools around the country voluntarily capped the production of new physicians. Osteopathic medical schools, on the other hand, did not limit their production of new physicians, growing by more than 100 percent between 1980 and 2000. Graduate medical education did not heed GMENAC's warning either. Between 1980 and 1990, the number of residents training in the U.S. increased by close to 50 percent, from 62,000 to 92,000 residents.¹⁰

Concerns about producing too many physicians continued at the national level, and by the mid-1990s, a number of organizations had joined in a call to limit or reduce the number of physicians being produced in the country. The well-known mantra, "110-50/50," a reference to the federal Council on Graduate Medical Education's (COGME) suggested physician production strategy, was first articulated in COGME's *Third Report* (1993).¹¹ The "110" referred to the total number of residency training slots available: 110 percent of the number of U.S. medical school graduates in 1993; while the "50/50" referred to the suggested specialty mix of new physicians: 50 percent primary care and 50 percent specialty disciplines. In 1994, an influential report suggested that under certain managed care delivery systems, physicians were being used much more sparingly.¹² Other recommendations from a consortium of organizations (including the American Medical Association, the American Osteopathic Association, the Association of American Medical Colleges, the American Associations of Colleges of Osteopathic Medicine, the Association of Academic Health Centers, and the National Medical Association)¹³ and the Pew Health Professions Commission¹⁴ reinforced COGME suggestions. Finally, in 1997, the federal Balanced Budget Act placed a real cap (in the form of economic disincentives to train more than a certain number of physicians) on graduate medical education.

It was not long, however, before the appropriateness of these recommendations was questioned. Consumer and provider backlash against the cost-cutting limitations imposed by managed care halted staff model HMO penetration well shy of its predicted pervasiveness. Anecdotal evidence began to circulate suggesting primary care physicians were having a more difficult time finding satisfactory practice positions than their specialist counterparts. Reports of specialist shortages (particularly anesthesiologists, radiologists, urologists, and child

⁹ Graduate Medical Education National Advisory Committee, *Report of the Graduate Medical Education National Advisory Committee to the Secretary*, Department of Health and Human Services. Washington, DC: U.S. Department of Health and Human Services. 1981.

¹⁰ Salsberg ES and GJ Forte. "Trends in the Physician Workforce, 1980-2000," *Health Affairs* 21, September/October (2002): 165-173.

¹¹ Council on Graduate Medical Education. *Third Report: Improving Access to Health Care Through Physician Workforce Reform*. Rockville, MD: COGME/Health Resources and Services Administration. 1992.

¹² Weiner JP. "Forecasting the Effects of Health Reform on U.S. Physician Workforce Requirement. Evidence from HMO Staffing Patterns," *Journal of the American Medical Association* 272, 3 (1994): 222-230.

¹³ *Consensus Statement on Physician Workforce*. AAMC Advisory no. 97-9. Washington, DC: AAMC. 1997.

¹⁴ Pew Health Professions Commission. *Critical Challenges: Revitalizing the Health Professions for the Twenty-first Century*. San Francisco, CA: University of California, San Francisco, Center for the Health Professions. 1995.

and adolescent psychiatrists) also became more common.¹⁵ The concern raised by the rapid aging of the population played into the questioning as well. Ultimately, in 2002 COGME commissioned a report to re-examine their physician workforce projections.

In January 2005, COGME released the findings of its re-examination of the previous physician workforce projections in its *Sixteenth Report, Physician Workforce Policy Guidelines for the United States, 2000 – 2020*.¹⁶ The report detailed forecasts of national physician supply and demand that indicated a substantial shortage of physicians by 2020. The magnitude of the shortage was estimated at 85,000 to 96,000 physicians, or between 7.5 and 8.5 percent of the likely number of physicians required to provide services for the nation's population in 2020.¹⁷

COGME's report joined a growing number of voices that had arrived at the same troubling conclusion. In the late 1990s, prominent physician workforce researchers began to question the notion of a national physician surplus widely held earlier in the decade. With aging general and physician populations, a stagnant medical education and training effort, more than 4,000 designated primary care health professional shortage areas (HPSAs), a decline in the growth of managed care, a willingness of payors to continue supporting rising rates of physician utilization, and reports from a dozen medical specialties of current or impending physician shortages, it no longer made sense to think in terms of physician surpluses. COGME's report attempted to bring all of these observations together.

One of the failings of COGME's report, however, was its lack of attention to regional and specialty-specific variations embedded in its forecasts. Thus, one of the ramifications of the report was movement by concerned stakeholders in a number of states to determine how the projected national physician shortage would play out in their areas. Amid renewed discussion of the adequacy of the physician workforce nationally, several pioneering

¹⁵ Schubert A, G Eckhout, & K Tremper. "An Updated View of National Anesthesia Personnel Shortfall," *Anesthesia & Analgesia* 96, 1 (2003): 207-214; Miller RD and WL Lanier. "The Shortage of Anesthesiologists: An Unwelcome Lesson for Other Medical Specialties," *Mayo Clinic Proceedings* 76, 10 (2001): 969-970; Schubert A, G Eckhout, T Cooperider, & A Kuhel. "Evidence of a Current and Lasting National Anesthesia Personnel Shortfall: Scope and Implications," *Mayo Clinic Proceedings* 76, 10 (2001): 995-1010; Foot DK, RP Lewis, TA Pearson, & GA Beller. "Demographics of Cardiology, 1950-2050." *Journal of the American College of Cardiology* 35, 4 (2000): 1067-1081; Kim WJ, N Enzer, D Bechtold, BA Brooks, P Joshi, C King, C Robinowitz, D Stubbe, E Szigethy, & P Tanguay. *Meeting the Mental Health Needs of Children and Adolescents: Addressing the Problems of Access to Care*. Report of the Task force on Work Force Needs. Washington, DC: American Academy of Childhood and Adolescent Psychology. 2001; Suneja T, ED Smith, GJ Chen, KJ Zipperstein, AB Fleischer, & SR Feldman. "Waiting Times to See a Dermatologist Are Perceived as Too Long by Dermatologists: Implications for the Dermatology Workforce," *Archives of Dermatology* 137, 10 (2001): 1303-1307; Neilson EG, W Suki, M Leonard, et al. American Society of Nephrology Ad Hoc Committee on Reform of Graduate Medical Education. 2001; Angus DC, MA Kelly, RJ Schmitz, A White, & J Popovich. "Caring for the Critically Ill Patient. Current and Projected Workforce Requirements for Care of the Critically Ill and Patients with Pulmonary Disease: Can We Meet the Requirements of an Aging Population?" *Journal of the American Medical Association* 284, 21 (2000): 2762-2070; Provonost PJ, DC Angus, T Dorman, KA Robinson, TT Dremsizov, & TL Young. "Physician Staffing Patterns and Clinical Outcomes in Critically Ill Patients: A Systematic Review," *Journal of the American Medical Association* 288, 17 (2002): 2151-2162; Sunshine JH. *Overview and Analysis of Information Regarding the Shortage*. Chicago, IL: American College of Radiology. 2001; Organ CH "The Generation Gap in Modern Surgery," *Archives of Surgery* 137, 3 (2002): 250-252; Etzoni DA, JH Liu, MA Maggard, & CY Ko. "The Aging Population and Its Impact on the Surgery Workforce," *Annals of Surgery* 238, 2 (2003): 170-177; Fleming KC, JM Evans, & DS Chutka. "Caregiver and Clinician Shortages in an Aging Nation," *Mayo Clinic Proceedings* 78, 8 (2003): 1026-1040.

¹⁶ Council on Graduate Medical Education. *Sixteenth Report: Physician Workforce Policy Guidelines for the United States, 2000-2020*. Rockville, MD: COGME/Health Resources and Services Administration. 2005.

¹⁷ In 2008, The Association of American Medical Colleges published an updated report projecting the supply and demand for physicians in the U.S.: Dill MJ, Salsberg ES. *The Complexities of Physician Supply and Demand: Projections through 2025*. Washington, DC: Center for Workforce Studies, Association of American Medical Colleges; 2008. This updated report suggested that the shortage of physicians is likely to be more acute than the Council on Graduate Medical Education's sixteenth report suggested.

states have taken it upon themselves to conduct assessments of the adequacy of their supplies of physicians now and with an eye to the future. Arizona, California, Florida, Kentucky, Massachusetts, Michigan, Mississippi, New Mexico, New Jersey, North Carolina, Oregon, Texas, Wisconsin, and others have either finished an assessment or are in the midst of one. Arizona, Florida, and Texas have deemed it necessary to expand medical school capacity in their states in order to assure an adequate supply of physicians in the future. Moreover, as stated above, in the past several years, specialty-specific examinations in cardiology, endocrinology, allergy and immunology, psychiatry, neurosurgery, pediatric subspecialties, dermatology, medical genetics, radiology, geriatric medicine, and critical care have also yielded findings of current or future shortages of physicians.

New York Perspective

With more than a dozen medical schools and over 15,000 residents and fellows, New York has made a considerable investment in training new physicians. The New York State Council on Graduate Medical Education was asked by Health Commissioner Richard Daines to consider issues related to the state's GME system and asked for recommendations on GME improvements and reforms. In response to this request, the Council deliberated and released a report¹⁸ in 2008 with recommendations about strengthening GME policy in the state. The report focused on several themes, including transparency and accountability in GME funding, improving the quality of training, promoting diversity in medicine, and recognition of the role of GME as an important source of new physicians in the state. The report presented a number of policy recommendations, including enhancing strategies to attract physicians to underserved communities, and supporting efforts to collect data that provide regular, periodic information about and analysis of physician supply in relation to demand for them. Some of these policy recommendations resulted in the establishment of new programs and policies designed to address physician maldistribution and shortages. One of these programs, a loan repayment and practice support initiative, *Doctors Across New York*, was implemented in 2008 to encourage physician recruitment and retention in underserved areas.

The COGME report acknowledged the work of the Center for Health Workforce Studies at the School of Public Health, University at Albany. The Center has monitored the physician workforce in New York for more than a decade.

- Since 1996, the Center has managed the New York Physician Licensure Re-registration Survey. Data drawn from this ongoing survey have become an important source of information on active physicians in the state.
- Beginning in 1998, the Center has conducted an annual survey of residents and fellows completing graduate medical training in New York. These data are used to monitor changes in the relative demand for various medical specialties.

Together, these research projects provide a critical base of information to understand supply and distribution of physicians in the state. In fact, findings from both of these sources were used in the analyses described in this report.

¹⁸ New York State Council on Graduate Medical Education. *Policy Recommendations to the Commissioner of Health*. March 2008. http://www.health.state.ny.us/nysdoh/gme/reports/docs/policy_recommendations.pdf.

Chapter 3: Demographic, Economic, and Health Status Profile of New York

Introduction

This report presents data about the demographics, economics, and health status of New York. By drawing from a wide variety of data sources, the objective of this report is to construct a context within which the current and future supply of and demand for physicians in New York can be understood. Comparative data from the United States overall as well as other states in proximity to New York are also presented.

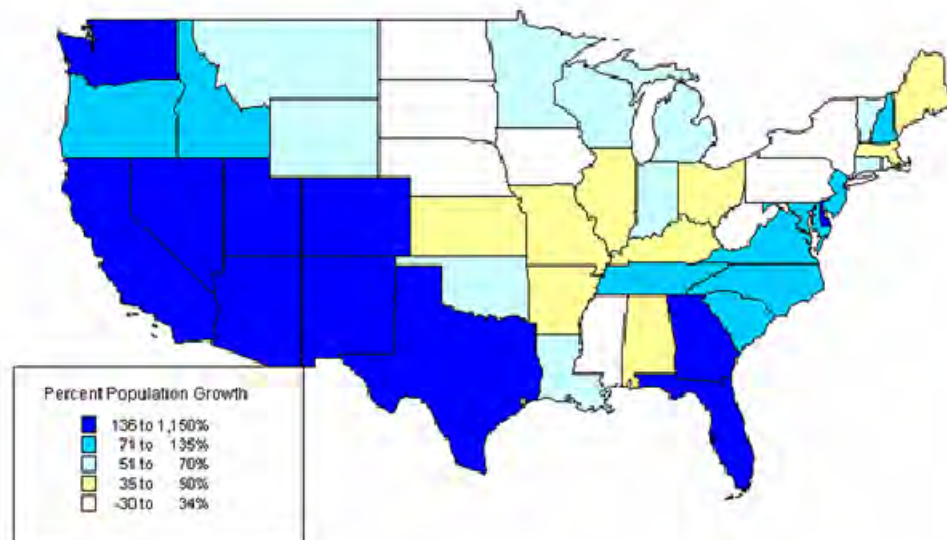
The data presented in this chapter are derived from a number of sources. Generally, historical population data were obtained from the U.S. Census Bureau. Base year 2006 data were obtained from Claritas. Population projection data were generated by the Center for Health Workforce Studies using the base year 2006 data to adjust population projections made by Cornell University's Program on Applied Demographics in 2008. See attributed sources throughout the chapter for more detail.

Demographic Trends

New York, with an estimated population of 19,289,506 in 2006, was the third most populous state in the U.S., with approximately 6.5 percent of Americans residing in New York. The state has ranked among the most populous since at least 1950 when, with a population of 14,830,192, it was the most populous state.

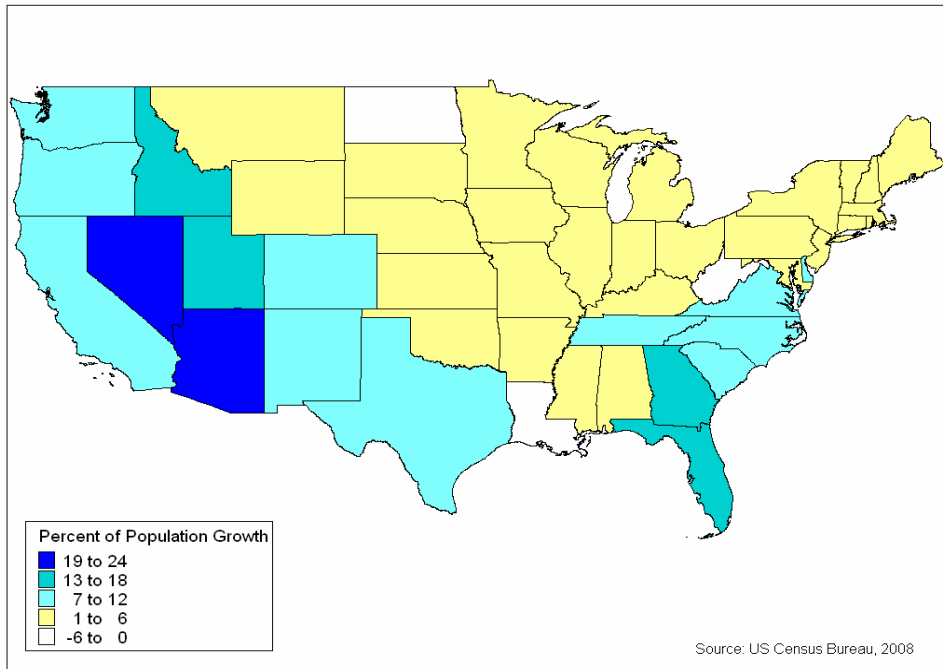
New York has not grown as quickly in either the short term or the long term as some states in other regions of the country, particularly those in the South and West. The population of New York grew by an estimated 28 percent between 1950 and 2000 (compared to the U.S. population growth of about 86 percent), and an estimated 2 percent between 2000 and 2006 (compared to the U.S. population growth of about 6 percent) (see Figures 1 and 2).

Figure 1 – Population Growth in the United States, 1950-2000



Source: U.S. Census Bureau, 2005

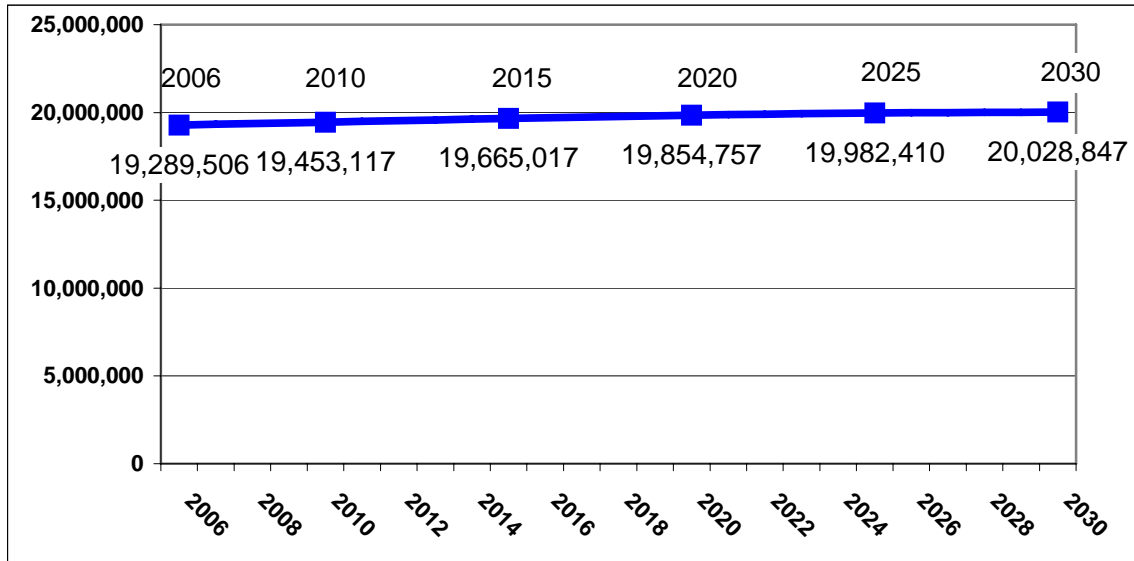
Figure 2 – Population Growth in the United States, 2000-2006



Projected Population Growth

New York’s slow population growth is expected to continue through the year 2030, with overall growth for the state between 2006 and 2030 at 3.8 percent, about 0.16 percent annually. This compares to projected growth of 25.0 percent (0.93 percent annually) for the U.S. during the same period¹⁹.

Figure 3 –Total Population Projection, New York, 2006 through 2030



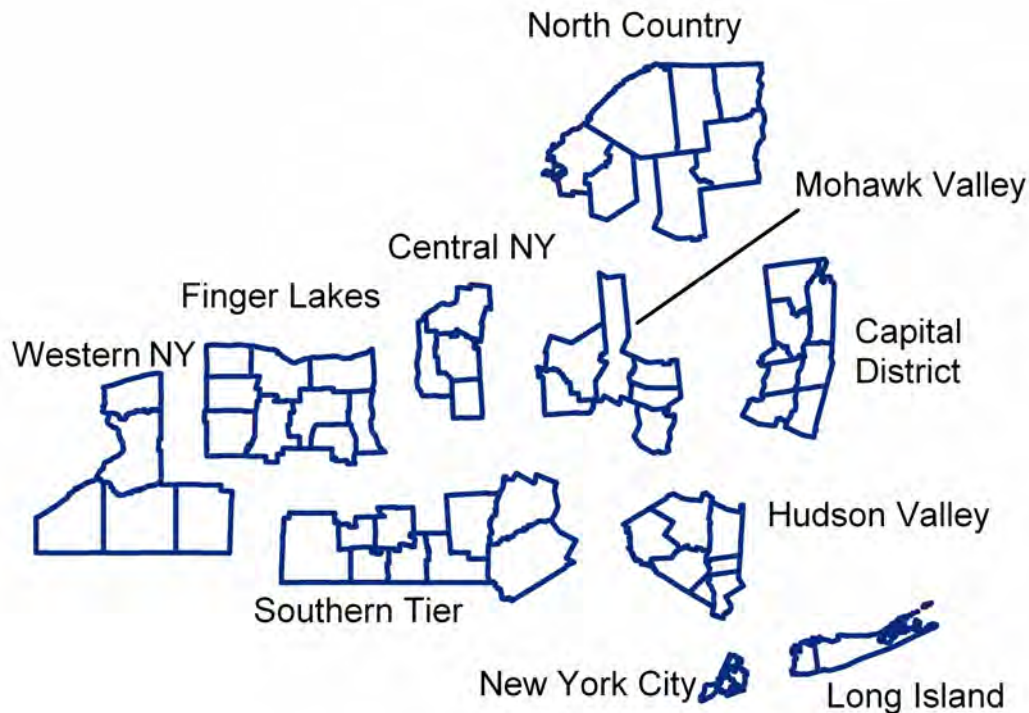
Sources: Claritas, 2006; Center for Health Workforce Studies adjusted Cornell University Program on Applied Demographics population projections vintage April 2008.

¹⁹ U.S. Census Bureau. Table 1: Projections of the Population and Components of Change for the United States: 2010 to 2050 (NP2008-T1). Retrieved 10/25/2008. <http://www.census.gov/population/www/projections/files/nation/summary/np2008-t1.xls>.

Regional Analysis

For this examination, New York's population was evaluated using the New York Health Workforce Data System analysis regions (See Figure 4).

Figure 4 – Map of New York Health Workforce Data System Analysis Regions

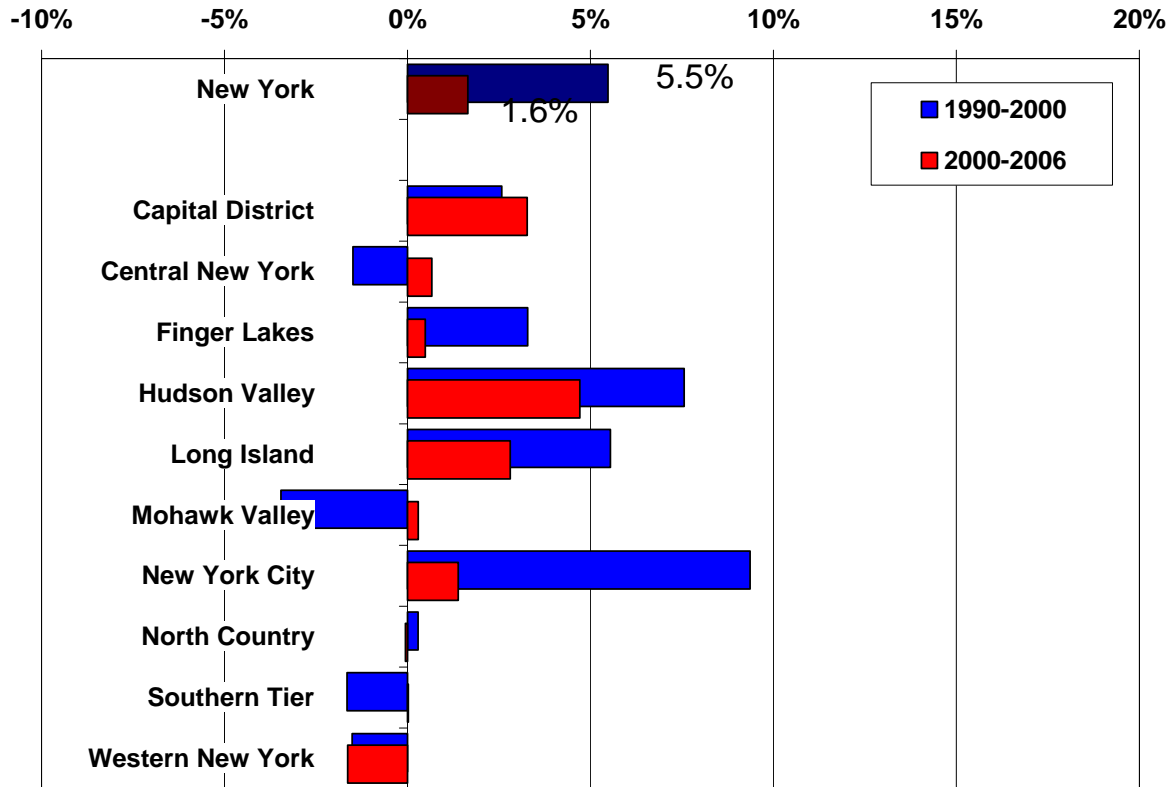


The population of New York is, to say the least, unevenly distributed. More than half of the population is located in the New York City region. With a population of 8,119,187, it had the largest population in 2006, followed by the Long Island region, with 2,795,377. The North Country region had the smallest population, with 429,178, followed by the Mohawk Valley region, with 504,226.

The New York City region experienced the most growth (9.4 percent) between 1990 and 2000, while the Hudson Valley region experienced the most growth (4.7 percent) between 2000 and 2006. Between 1990 and 2006, the Hudson Valley region had the second most growth (7.6 percent), followed by Long Island (5.5 percent). Between 2000 and 2006, the Capital District had the second largest growth (3.3 percent), followed by Long Island (2.8 percent), as shown in Figure 5.

Between 1990 and 2000, the Mohawk Valley region experienced the greatest loss of population (3.5 percent), followed by the Southern Tier region (1.7 percent) and Central and Western New York regions (1.5 percent each). Since 2000, declines in population were experienced by the Western New York region (1.6 percent) and the North Country region (0.1 percent).

Figure 5 – Historical Population Change in New York by Region, 1990-2006 and 2000-2006



Sources: U.S. Census Bureau. Table CO-EST2001-12-36 - Time Series of New York Intercensal Population Estimates by County: April 1, 1990 to April 1, 2000. Retrieved 11/15/2007. http://www.census.gov/popest/archives/2000s/vintage_2001/CO-EST2001-12/CO-EST2001-12-36.xls; U.S. Census Bureau. Table 1: Annual Estimates of the Population for Counties of New York: April 1, 2000 to July 1, 2007 (CO-EST2007-01-36). Retrieved 03/20/2008. <http://www.census.gov/popest/counties/tables/CO-EST2007-01-36.xls>.

Table 1 – Population Size and Projected Growth by Region, 2006-2030

	2006	2010	2015	2020	2025	2030	% Change 2006 to 2030	Avg Annual % Change
Statewide	19,289,506	19,453,118	19,665,016	19,854,757	19,982,410	20,028,847	3.8%	0.16%
Capital District	1,063,621	1,063,173	1,062,733	1,059,133	1,050,684	1,036,696	-2.5%	-0.11%
Central New York	716,032	706,963	696,152	683,492	668,202	650,046	-9.2%	-0.40%
Finger Lakes	1,205,419	1,206,018	1,207,086	1,205,606	1,199,061	1,186,249	-1.6%	-0.07%
Hudson Valley	2,281,845	2,309,665	2,344,431	2,377,124	2,401,883	2,415,524	5.9%	0.24%
Long Island	2,831,266	2,831,259	2,831,291	2,830,637	2,818,832	2,789,402	-1.5%	-0.06%
Mohawk Valley	507,194	502,322	496,150	488,802	479,942	468,912	-7.5%	-0.33%
New York City	8,119,187	8,289,458	8,507,739	8,720,871	8,910,821	9,073,034	11.7%	0.46%
North Country	425,633	429,820	435,774	440,406	444,288	447,345	5.1%	0.21%
Southern Tier	719,143	715,303	711,041	704,192	695,422	684,532	-4.8%	-0.21%
Western New York	1,420,166	1,399,137	1,372,619	1,344,494	1,313,277	1,277,106	-10.1%	-0.44%

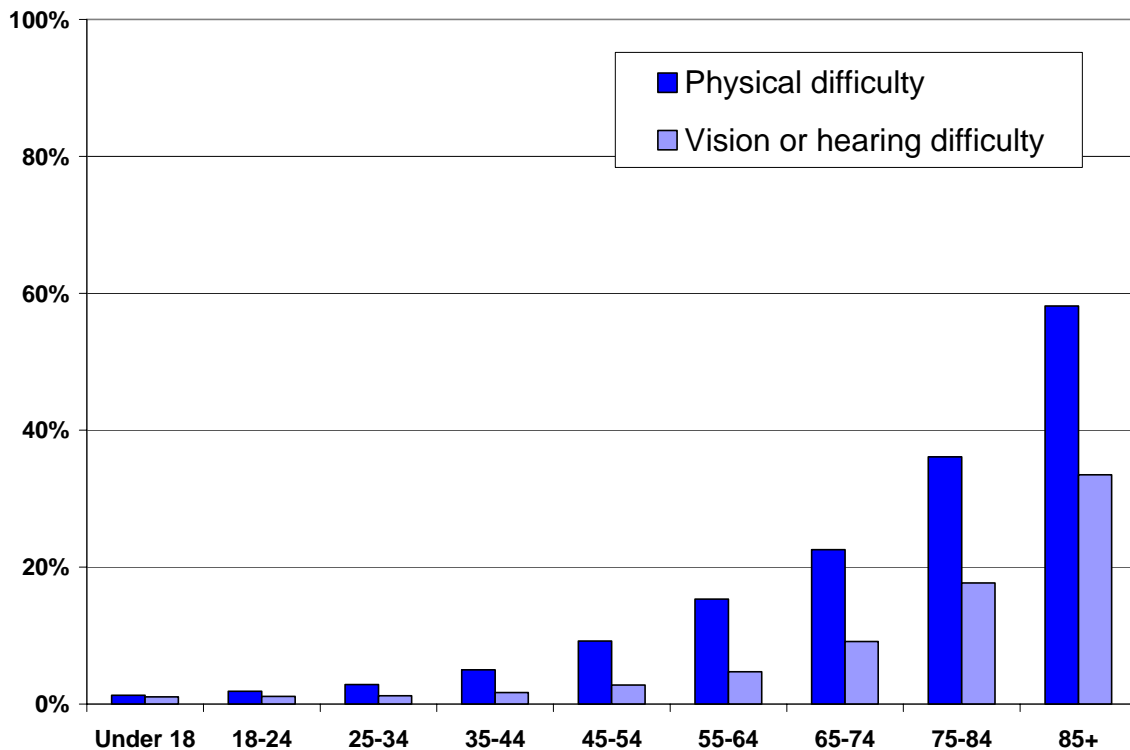
Sources: Claritas, 2006; Center for Health Workforce Studies adjusted Cornell University Program on Applied Demographics population projections vintage April 2008.

Only a few regions in New York are expected to grow between 2006 and 2030. Projected rates of growth vary widely by region (Table 1). The region expected to experience the most growth between 2006 and 2030 is New York City (11.7 percent), followed by the Hudson Valley (5.9 percent), and the North Country (5.1 percent). All other regions are expected to experience a population loss through 2030. The regions with the greatest projected losses are Western New York (10.1 percent), Central New York (9.2 percent), and the Mohawk Valley (7.5 percent).

The Aging Population

One of the most notable demographic trends projected for the U.S. as a whole and for New York is the aging of the population. Lower rates of mortality and greater life expectancy have steadily increased both the number and percentage of the population age 65 and older since the beginning of the 20th century. This increase is expected to accelerate dramatically, too, as members of the baby boom generation (the large cohort born between 1946 and 1964) begin to turn age 65 in 2011. The consequences of this trend will be especially pronounced for health care. Utilization of health care tends to increase throughout the life course from a low reached approximately between age five and seven. Already, New York’s large cohort of middle-aged baby boomers is experiencing greater disability as they approach their senior years (Figure 6).

Figure 6 – Percentage of New York Residents Reporting Vision/Hearing Difficulties or Physical Difficulties by Age, 2006

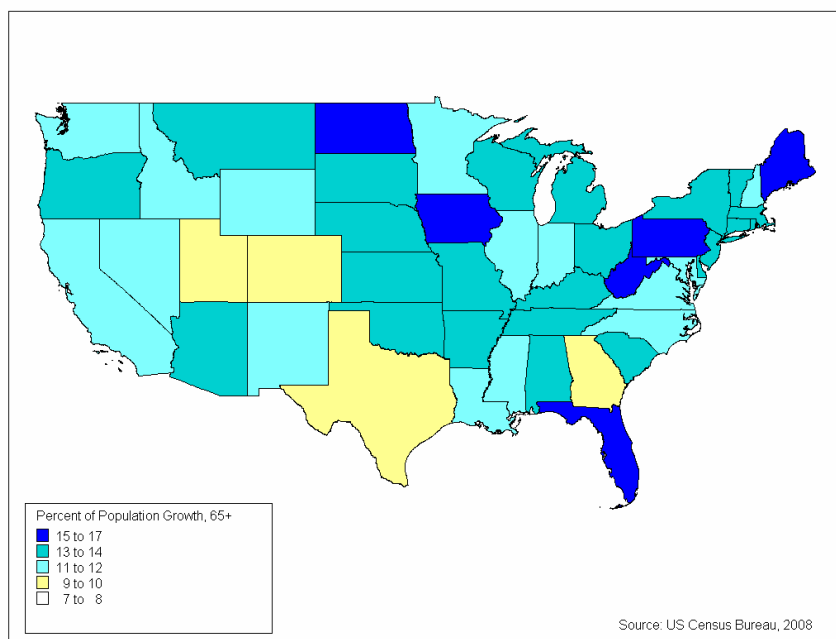


Source: American Community Survey, 2006.

One group of older adults that will grow dramatically in the near future is those age 85 and older. These “oldest old” use the most long-term care services. Age-specific utilization rates for nursing homes have been declining, however, as the overall health and disability status of the elderly continues to improve.²⁰

In 2006, the percentage of New York residents age 65 and older was higher than the national average, with 13.2 percent of New York residents age 65 and older, compared to 12.1 percent²¹ (Figure 7).

Figure 7 – Percentage of the Population Age 65 and Older in the U.S., 2006



There was regional variation in the distribution of older residents. In 2006, 15.9 percent of the Mohawk Valley region residents and 15.6 percent of Western New York region residents were age 65 and older, compared to only 12.2 percent of New York City region residents and 12.8 percent of Hudson Valley region residents.

²⁰ Center for Health Workforce Studies. *The Impact of the Aging Population on the Health Workforce in the United States*. Rensselaer, NY: Center for Health Workforce Studies, School of Public Health, SUNY Albany; 2005.

²¹ U.S. Census Bureau. *Current Population Survey, Annual Social and Economic Supplement, 2006. Table 1.1 Population by Age, Sex, Race and Hispanic Origin: 2006*. Available July 27, 2007 at http://www.census.gov/population/socdemo/age/2006older_table1.1.xls Accessed March 20, 2008.

Table 2 – Percent of Population Age 65 and Older by Region, 2006

	Population	Percentage
Statewide	2,546,070	13.2%
Capital District	150,690	14.2%
Central New York	96,452	13.5%
Finger Lakes	161,870	13.4%
Hudson Valley	292,568	12.8%
Long Island	387,451	13.7%
Mohawk Valley	80,408	15.9%
New York City	989,386	12.2%
North Country	56,644	13.3%
Southern Tier	108,440	15.1%
Western New York	222,161	15.6%

Source: Claritas, 2006.

A great deal of regional variation existed in growth by various age groups between 2000 and 2006 (Table 3). For example, in all regions, the number of residents age 25 to 44 declined. This age group represents those of prime working age, so this trend has tremendous implications for the supply of health care workers, including physicians. In particular, the regions of Western New York, Finger Lakes, and Long Island experienced population declines in this age group (10.4, 9.7, and 9.7 percent, respectively).

All regions experienced growth in the group age 45 to 64. Moreover, in regions that experienced overall population growth between 2000 and 2006, the rate of growth among the 45 to 64 age group was far higher. A similar pattern was observed for the population age 85 and older; all regions experienced growth in this age group at levels exceeding overall population growth.

Table 3 – Historical Percentage Population Change by Age Group and Region, 2000-2006

	Age Group						85 and Older
	Younger than 5	5-14	15-24	25-44	45-64	65-84	
Statewide	-0.2%	-6.4%	3.8%	-5.7%	14.7%	1.9%	18.7%
Capital District	-5.7%	-8.8%	12.2%	-3.7%	16.5%	0.5%	17.4%
Central New York	-6.6%	-11.4%	7.2%	-7.0%	16.1%	-1.8%	24.8%
Finger Lakes	-6.9%	-12.4%	11.2%	-9.7%	15.9%	1.5%	18.3%
Hudson Valley	-2.4%	-2.8%	19.5%	-6.5%	17.4%	5.4%	12.6%
Long Island	-5.4%	-4.1%	16.7%	-9.7%	17.3%	3.3%	19.7%
Mohawk Valley	-6.8%	-12.1%	13.3%	-8.0%	13.0%	-3.8%	14.3%
New York City	6.8%	-3.8%	-7.7%	-2.8%	13.1%	3.3%	20.2%
North Country	-6.1%	-14.1%	5.6%	-6.2%	12.3%	3.0%	15.0%
Southern Tier	-6.9%	-14.2%	7.7%	-7.1%	12.1%	-0.9%	18.1%
Western New York	-8.4%	-12.7%	7.1%	-10.4%	12.9%	-5.1%	19.5%

Source: U.S. Census Bureau, 2008; Claritas, 2006.

Between 2006 and 2030, the fastest growing group of New York residents is projected to be those age 65 to 84 (Tables 4 and 5). People in this age group are projected to increase in number by 48.7 percent (1.67 percent annually). They are followed by people age 85 and older, who are projected to increase in number by 31 percent (1.14 percent annually). Several groups of New York residents are expected to decrease in number. Those age 5 to 14 are projected to decline in number by 2.0 percent, and those age 15 to 24 are projected to decline in number by 2.3 percent. People age 25 to 44 are projected to decrease in number by 1.5 percent, and those age 45 to 64 are projected to decrease in number by 5.1 percent between 2006 and 2030. With few exceptions, the declines are projected to be far greater in regions outside New York City.

Table 4 – Projected Population Change by Age Group and Region, 2006-2030

	Age Group						85 and Older
	Younger than 5	5-14	15-24	25-44	45-64	65-84	
Statewide	2,620	-49,682	-59,232	-79,770	-250,227	1,060,579	115,053
Capital District	-3,578	-11,287	-14,398	-22,879	-47,558	65,545	7,230
Central New York	-3,954	-10,310	-14,184	-24,201	-48,049	30,450	4,263
Finger Lakes	-2,058	-7,257	-14,128	-13,914	-57,781	69,198	6,769
Hudson Valley	7,017	-2,880	-2,131	21,691	-32,390	123,912	18,460
Long Island	607	-42,066	-34,848	-33,196	-89,224	132,828	24,034
Mohawk Valley	-2,745	-6,142	-9,979	-14,242	-29,356	22,199	1,983
New York City	17,646	52,740	67,801	63,618	198,257	510,399	43,387
North Country	890	4,265	-53	6,087	-13,347	21,707	2,164
Southern Tier	-2,259	-3,683	-7,591	-15,333	-41,566	32,166	3,655
Western New York	-8,947	-23,062	-29,721	-47,400	-89,213	52,176	3,107

Sources: Claritas, 2006; Center for Health Workforce Studies adjusted Cornell University Program on Applied Demographics population projections vintage April 2008.

Table 5 – Projected Percentage Population Change by Age Group and Region, 2006-2030

	Age Group						85 and Older
	Younger than 5	5-14	15-24	25-44	45-64	65-84	
Statewide	0.2%	-2.0%	-2.3%	-1.5%	-5.1%	48.7%	31.1%
Capital District	-6.2%	-8.7%	-9.4%	-7.9%	-16.8%	51.2%	32.0%
Central New York	-9.4%	-10.9%	-12.9%	-12.7%	-26.3%	37.2%	29.3%
Finger Lakes	-3.0%	-4.6%	-7.8%	-4.4%	-18.2%	50.6%	26.9%
Hudson Valley	4.8%	-0.9%	-0.7%	3.6%	-5.4%	49.1%	45.9%
Long Island	0.3%	-10.9%	-9.5%	-4.4%	-11.7%	39.4%	47.6%
Mohawk Valley	-10.2%	-9.8%	-13.0%	-11.1%	-22.1%	32.8%	15.5%
New York City	3.1%	5.0%	6.6%	2.5%	10.3%	60.5%	29.7%
North Country	3.8%	8.3%	-0.1%	5.1%	-12.9%	44.2%	28.6%
Southern Tier	-6.1%	-4.4%	-6.1%	-8.6%	-22.3%	34.9%	22.3%
Western New York	-11.2%	-12.9%	-14.4%	-13.1%	-24.0%	27.7%	9.3%

Sources: Claritas, 2006; Center for Health Workforce Studies adjusted Cornell University Program on Applied Demographics population projections vintage April 2008.

Immigration and Racial/Ethnic Composition

Two factors that contributed to the diversity of demographic trends within New York were immigration and racial/ethnic composition. In 2006, the percentage of foreign-born residents in New York (22.3 percent) was considerably higher than the national average (12.5 percent).²² The number of immigrants is one factor that affects the demand for health care, as foreign-born persons use health care differently and have different health care needs than native-born persons.²³ The data presented include the U.S. Census Bureau's best estimates of undocumented immigrants, but unfortunately, there is no reliable source of data on how many of foreign-born persons are undocumented.

Overall, in 2006 approximately two-thirds (64.5 percent) of New York residents were born in the state and of those not born in the U.S., half were naturalized citizens (Table 6). More than one out of five immigrants in New York entered the U.S. between 2000 and 2006 (Table 7). The likelihood of naturalized citizenship among immigrants increased with the amount of time they resided in the U.S.; 83.2 percent of those entering before 1980 became naturalized citizens, while only 9.3 percent entering between 2000 and 2006 had become naturalized citizens.

Table 6 – Place of Birth of New York Residents, 2006

	Number	Percent (of total population)
Total Population	19,289,506	100.0%
<i>Native U.S. (incl. U.S. territories)</i>	<i>15,114,154</i>	<i>78.4%</i>
Born in New York	12,435,855	64.5%
Born in Other State	2,553,159	13.2%
Northeast region	909,638	4.7%
Other regions	1,643,521	8.5%
<i>Foreign-Born</i>	<i>4,300,492</i>	<i>22.3%</i>
Born abroad of U.S. citizens	125,140	0.6%
Naturalized Citizen	2,154,466	11.2%
Not a Citizen	2,020,886	10.5%

Source: Extrapolated from American Community Survey, 2006.

²² American Community Survey, 2006.

²³ Derose KP, Escarce JJ, Lurie N. Immigrants and health care: Sources of vulnerability. *Health Affairs*. 2007;26(5):1258-1268; Goldman DP, Smith JP, Sood N. Immigrants and the cost of medical care. *Health Affairs*. 2006;25(6):1700-1711; Ortega AN, Fang H, Perez VH, Rizzo JA, Carter-Pokras O, Wallace SP, Gelberg L. Health care access, use of services, and experiences among undocumented Mexicans and other Latinos. *Archives of Internal Medicine*. 2007;167(21):2354-2350.

Table 7 – Characteristics of Foreign-Born New York Residents, 2006

	Number	Percent
Foreign-Born	4,300,492	100.0%
Year of Entry 2000-2006	848,602	19.7%
<i>Naturalized Citizen</i>	74,401	8.8%
<i>Not a Citizen</i>	727,271	85.7%
<i>Born abroad of U.S. citizen(s)</i>	46,930	5.5%
Year of Entry 1990-1999	1,261,154	29.3%
<i>Naturalized Citizen</i>	511,395	40.5%
<i>Not a Citizen</i>	686,984	54.5%
<i>Born abroad of U.S. citizen(s)</i>	62,775	5.0%
Year of Entry 1980-1989	941,757	21.9%
<i>Naturalized Citizen</i>	577,146	61.3%
<i>Not a Citizen</i>	292,217	31.0%
<i>Born abroad of U.S. citizen(s)</i>	72,395	7.7%
Year of Entry before 1980	1,248,979	29.0%
<i>Naturalized Citizen</i>	935,844	66.9%
<i>Not a Citizen</i>	168,386	13.5%
<i>Born abroad of U.S. citizen(s)</i>	244,749	19.6%

Source: Extrapolated from American Community Survey, 2006.

The percentage of the population that was foreign-born varied across regions. The New York City, Hudson Valley, and Long Island regions had the highest percentages of foreign-born residents (36.7, 17.1, and 16.4 percent, respectively), while the North Country, Mohawk Valley, Western New York, and Southern Tier regions each had populations only about 4 percent foreign-born (Table 8).

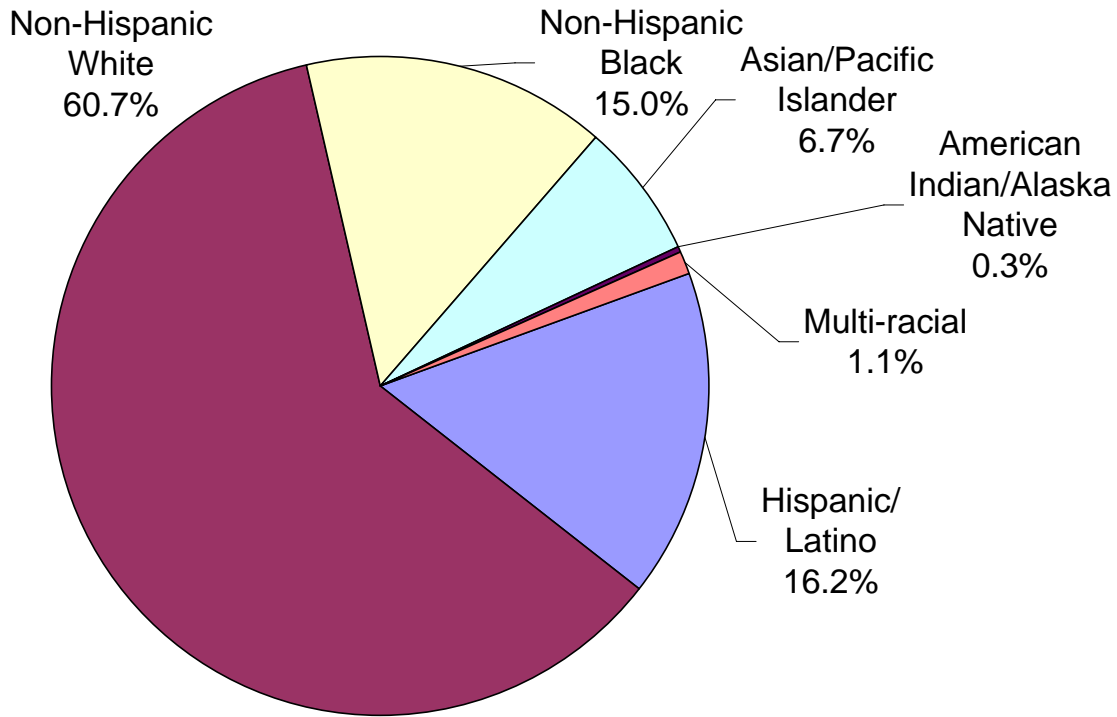
Table 8 – Foreign-Born Population in New York by Region, 2006

	Number Foreign-Born	% Foreign-Born
Statewide	4,300,492	22.3%
Capital District	58,500	5.5%
Central New York	31,393	4.4%
Finger Lakes	67,466	5.6%
Hudson Valley	390,339	17.1%
Long Island	463,391	16.4%
Mohawk Valley	20,086	4.0%
New York City	2,983,168	36.7%
North Country	14,346	3.4%
Southern Tier	34,747	4.8%
Western New York	61,057	4.3%

Source: American Community Survey, 2005-2007.

Compared to the nation as a whole in 2006, New York had a smaller non-Hispanic White population (60.7 percent compared to 66.5 percent) (Figure 8). The non-Hispanic Black/African American population in New York was slightly larger than it was nationally (15.0 percent compared to 12.2 percent), as was the population of Hispanics/Latinos (16.2 percent compared to 14.7 percent).

Figure 8– Racial/Ethnic Composition of New York Residents, 2006



Source: US Census Bureau, 2008.

The variations in race/ethnicity by region are shown in Table 9. The least diverse regions of New York were the Mohawk Valley (approximately 91.0 percent non-Hispanic White), North Country, and Southern Tier (90.5 and 90.3 percent non-Hispanic White, respectively), while New York City’s population was 35.5 percent non-Hispanic White.

Table 9 – Racial/Ethnic Composition of New York Residents by Region, 2006

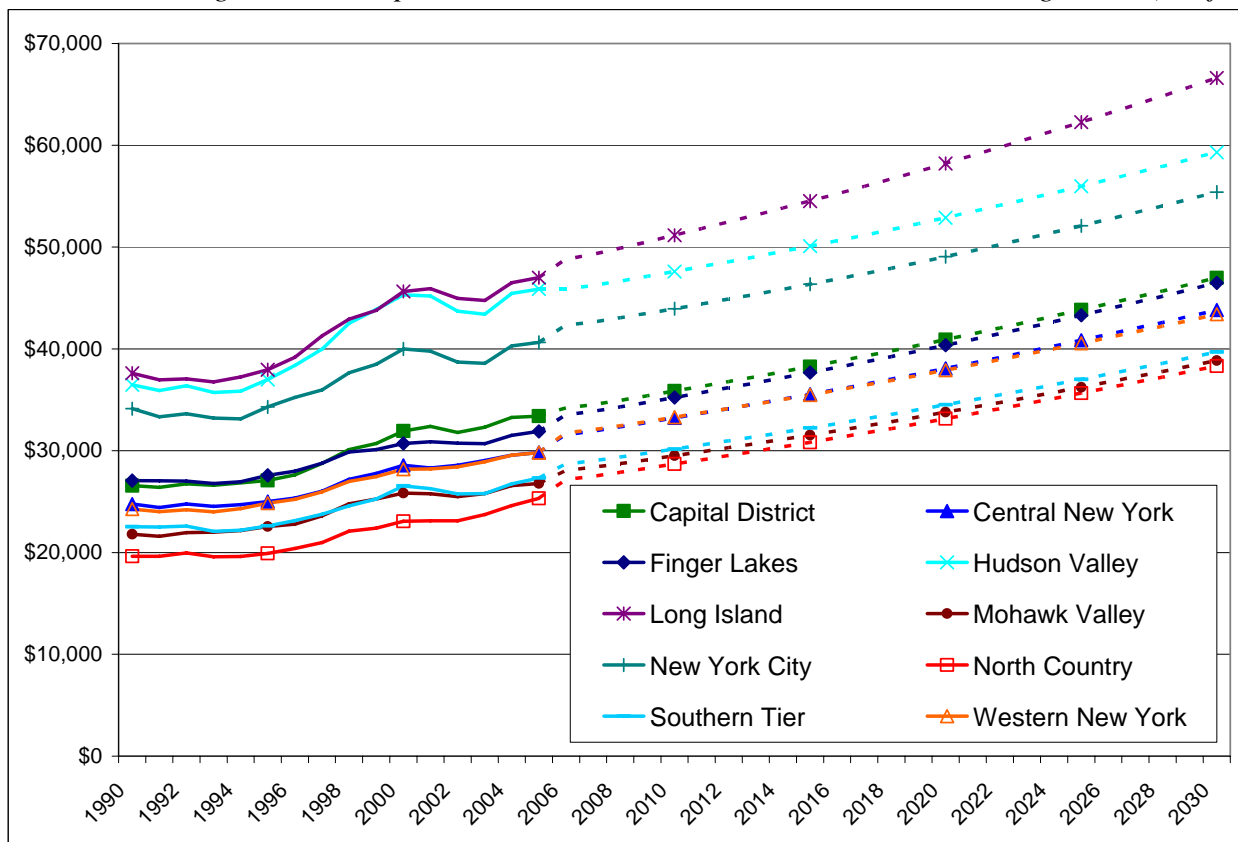
	Non-Hispanic White	Hispanic/Latino	Non-Hispanic Black	American Indian/Alaska Native	Asian/Pacific Islander	Multi-Racial
Statewide	60.7%	16.2%	15.0%	0.3%	6.7%	1.1%
Capital District	86.8%	3.1%	6.3%	0.2%	2.4%	1.2%
Central New York	86.7%	2.5%	7.0%	0.7%	1.8%	1.3%
Finger Lakes	82.2%	4.6%	9.8%	0.3%	2.0%	1.2%
Hudson Valley	69.5%	14.4%	10.7%	0.2%	4.2%	1.1%
Long Island	72.8%	12.5%	8.7%	0.2%	4.8%	1.0%
Mohawk Valley	91.0%	3.3%	3.4%	0.3%	1.0%	0.9%
New York City	35.5%	27.4%	24.1%	0.3%	11.6%	1.2%
North Country	90.3%	2.9%	3.7%	1.3%	0.9%	0.9%
Southern Tier	90.5%	2.2%	3.0%	0.3%	2.8%	1.2%
Western New York	83.7%	3.2%	9.9%	0.8%	1.5%	0.9%

Source: US Census Bureau, 2008.

Economic Indicators and Trends

The per capita income²⁴ of New York residents was \$40,324 in 2006 (Figure 9). Per capita income varied widely across regions from a low of \$27,710 in the North Country region to a high of \$48,824 in the Long Island region. The greatest per capita incomes were observed in the downstate area, with the Long Island, Hudson Valley, and New York City regions all exceeding \$42,000. Outside of those regions, the greatest per capita income was in the Capital District region (\$34,188). Between 1990 and 2006, the income of New York residents increased from \$31,668 to \$40,324 (Woods and Poole Economics, 2007), a cumulative increase of 27.3 percent, or about 1.52 percent per year. Per capita income changed at about the same rate between 1990 and 2006 across New York regions with the exception of the North Country region which experienced growth of 38.4 percent, or about 2.05 percent per year.

Figure 9 – New York Regional Per Capita Income in Constant 2004 Dollars, 1990 through 2030 (Projected)



Source: Woods and Poole Economics 2007.

Per capita income is projected to grow by 33.9 percent (1.22 percent per year) from \$40,324 to \$54,008 between 2006 and 2030. Per capita income in the Hudson Valley and New York City regions is projected to grow at a slower rate than other areas of the state (1.07 and 1.13 percent per year compared to 1.22 percent statewide). The North Country region is projected to grow at the quickest rate between 2006 and 2030 (1.44 percent annually).

²⁴ All income data are expressed in 2004 U.S. dollars.

Table 10 – Projected Change in Per Capita Income in New York by Region, 2006 - 2030

Per Capita Income				
(in constant 2004 dollars)				
	2006	2030 (projected)	% Change	Annualized Change
Statewide	\$40,324	\$54,008	33.9%	1.22%
Capital District	\$34,188	\$46,982	37.4%	1.33%
Central New York	\$31,597	\$43,814	38.7%	1.37%
Finger Lakes	\$33,532	\$46,478	38.6%	1.37%
Hudson Valley	\$45,904	\$59,302	29.2%	1.07%
Long Island	\$48,824	\$66,598	36.4%	1.30%
Mohawk Valley	\$28,080	\$38,865	38.4%	1.36%
New York City	\$42,334	\$55,390	30.8%	1.13%
North Country	\$27,170	\$38,325	41.1%	1.44%
Southern Tier	\$28,715	\$39,684	38.2%	1.36%
Western New York	\$31,760	\$43,404	36.7%	1.31%

Source: Woods and Poole Economics 2007

In 2007, the unemployment rate in New York was 4.5 percent almost equal to the national unemployment rate of 4.6 percent (Table 11). The North Country and New York City regions had the highest levels of unemployment (5.5 and 5.0 percent, respectively). The lowest levels of unemployment were found in the Long Island and Hudson Valley regions (3.7 and 3.9 percent, respectively). Between 1992 and 2007, there was a relatively consistent decline (with the exception of the 2000 to 2003 period) in the unemployment rate across the state (Figure 10).²⁵

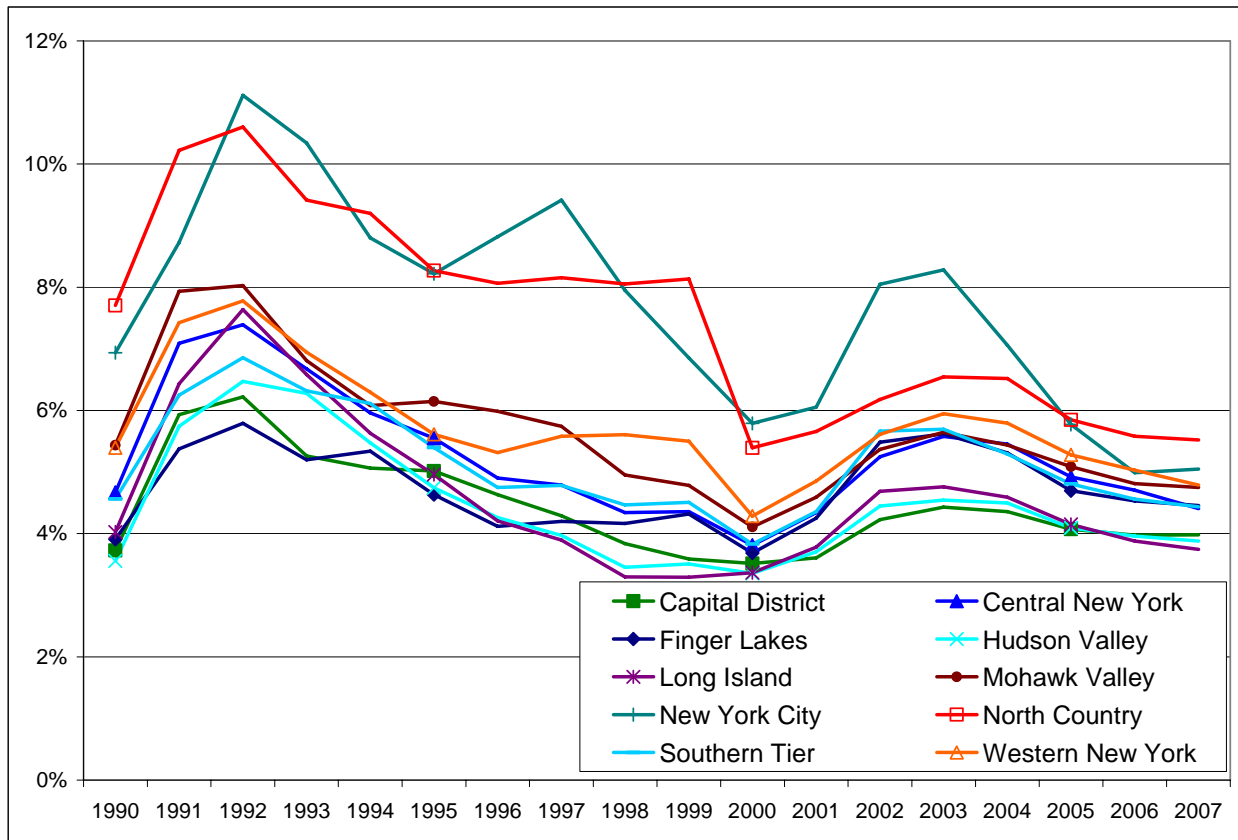
Table 11 – New York Unemployment Rate by Region, 1992-2007

Unemployment Rate				
	1992	1997	2002	2007
Statewide	8.6%	6.5%	6.2%	4.5%
Capital District	6.2%	4.3%	4.2%	4.0%
Central New York	7.4%	4.8%	5.2%	4.4%
Finger Lakes	5.8%	4.2%	5.5%	4.5%
Hudson Valley	6.5%	4.0%	4.4%	3.9%
Long Island	7.6%	3.9%	4.7%	3.7%
Mohawk Valley	8.0%	5.7%	5.4%	4.8%
New York City	11.1%	9.4%	8.0%	5.0%
North Country	10.6%	8.2%	6.2%	5.5%
Southern Tier	6.9%	4.8%	5.7%	4.4%
Western New York	7.8%	5.6%	5.6%	4.8%

Source: U.S. Bureau of Labor Statistics, 2008

²⁵ Since this chapter was originally drafted, the unemployment rate across the state has increased dramatically. The regional patterns of unemployment, however, have remained consistent. See *Civilian labor force, employed, unemployed, and rate of unemployed, New York State, major labor areas and economic development regions, current month, previous month, and year-ago*. New York State Department of Labor. http://www.empire.state.ny.us/NYSDataCenter/Data/EconomicData/Employment_Labor/CLFSummary.xls. (Accessed April 13, 2010).

Figure 10 – New York Regional Unemployment Rate, 1990-2007

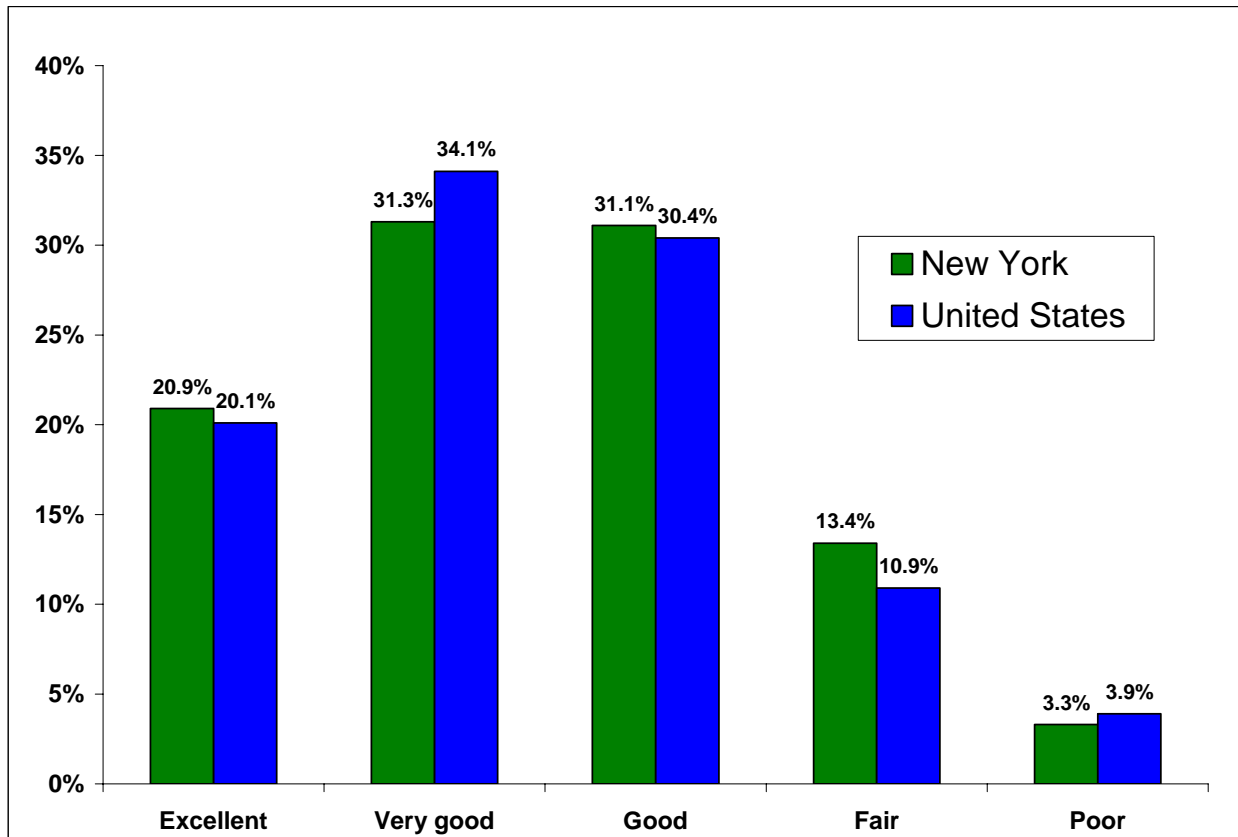


Source: U.S. Bureau of Labor Statistics, 2008

Health Status, Access, and Utilization Indicators

The majority (52.3 percent) of New York residents reported themselves to be in either excellent or very good health (Figure 11). This represented a decline from 60 percent in 1996,²⁶ however. Very few reported themselves to be in poor health, although the likelihood of such an assessment varied by age and race/ethnicity. Overall, New York residents rated their health status very similarly to the entire country.

Figure 11 – Self-Reported Health Status of New York Residents, 2006



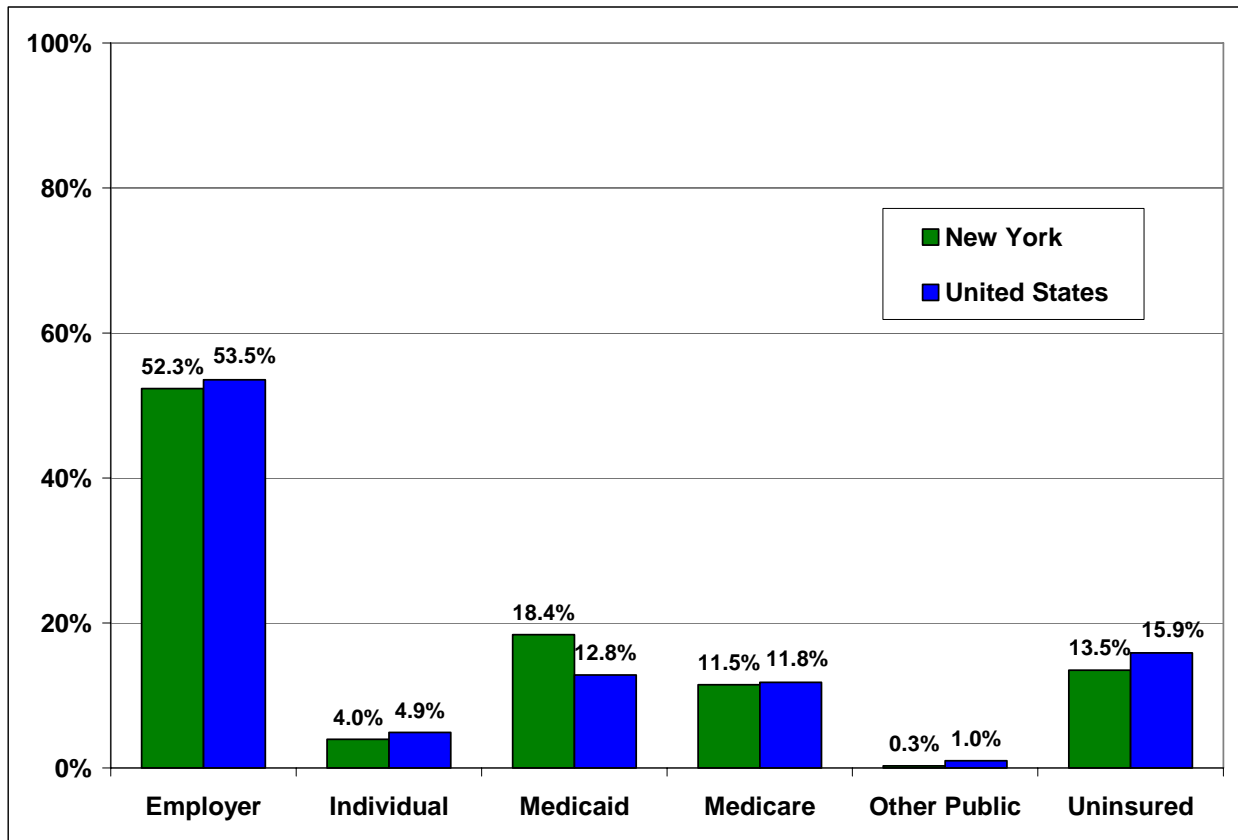
Source: Centers for Disease Control and Prevention (CDC). *Behavioral Risk Factor Surveillance System Survey Data*. Atlanta, GA: U.S. Department of Health and Human Services, CDC; 2006.

About 86.5 percent of New York residents reported having a health plan in 2006 (Figure 12), down slightly from 87.6 percent in 1996.²⁷ Certain regions had more uninsured individuals than other regions (Table 12). In particular, the Southern Tier and North Country regions had the greatest rate of uninsurance (17.2 and 16.7 percent, respectively). In contrast, only 12.3 percent of the residents of the Western New York region lacked health insurance.

²⁶ Centers for Disease Control and Prevention (CDC). *Behavioral Risk Factor Surveillance System Survey Data*. Atlanta, GA: U.S. Department of Health and Human Services, CDC; 1996.

²⁷ Centers for Disease Control and Prevention (CDC). *Behavioral Risk Factor Surveillance System Survey Data*. Atlanta, GA: U.S. Department of Health and Human Services, CDC; 1996.

Figure 12 –Sources of Health Insurance Among New York Residents, 2006



Source: Urban Institute and Kaiser Commission on Medicaid and the Uninsured estimates based on the U.S. Census Bureau’s March 2006 and 2007 Current Population Survey (CPS: Annual Social and Economic Supplements).

Table 12 – Percentage of New York Residents Without Health Insurance by Region, 2005

Percentage of the Population Without Health Insurance	
Capital District	13.9%
Central New York	13.3%
Finger Lakes	12.8%
Hudson Valley	15.7%
Long Island	15.2%
Mohawk Valley	14.3%
New York City	15.5%
North Country	16.7%
Southern Tier	17.2%
Western New York	12.3%

Source: Small Area Health Insurance Estimates/County and State by Demographic and Income Characteristics, 2005 (U.S. Census Bureau).

The use of medical services varied substantially among the different regions of New York. The Mohawk Valley region had the greatest number of inpatient days per 1,000 population (1,651), while the North Country had the fewest (844). The Southern Tier region had the greatest number of emergency room visits per 1,000 population (515), while Long Island had the least (337). Outpatient visits (excluding emergency visits) were also highest in the Southern Tier region (4,538), and lowest in the Hudson Valley (1,318). Finally, surgeries per 1,000 population were highest in the Western New York region (135) and lowest in New York City (85).

Table 13 – Utilization of Medical Services in Short-Term General Hospitals, Total and Per 1,000 Population, 2004

REGION	Inpatient Days		Emergency Department Visits		Outpatient Visits		Surgeries	
	Total	Per 1,000 Population	Total	Per 1,000 Population	Total	Per 1,000 Population	Total	Per 1,000 Population
Statewide	27,068,200	1,181	7,655,348	398	42,764,755	2,224	1,865,309	97
Capital District	973,401	923	421,591	400	2,672,751	2,536	100,560	95
Central New York	653,732	915	245,961	344	1,570,961	2,199	69,101	97
Finger Lakes	1,128,381	937	443,938	369	5,284,047	4,389	120,047	100
Hudson Valley	2,652,764	1,175	774,503	343	2,976,212	1,318	208,600	92
Long Island	3,140,073	1,115	947,420	337	4,264,023	1,515	306,130	109
Mohawk Valley	835,296	1,651	203,561	402	1,479,214	2,923	53,577	106
New York City	10,311,869	1,272	3,511,509	433	17,033,645	2,102	688,757	85
North Country	359,968	844	193,318	453	1,142,699	2,680	44,553	104
Southern Tier	862,555	1,199	370,332	515	3,264,629	4,538	81,058	113
Western New York	1,788,781	1,255	543,215	381	3,076,574	2,158	192,926	135

Source: Area Resource File 2005

Chapter 4: New York Physician Workforce, 2006

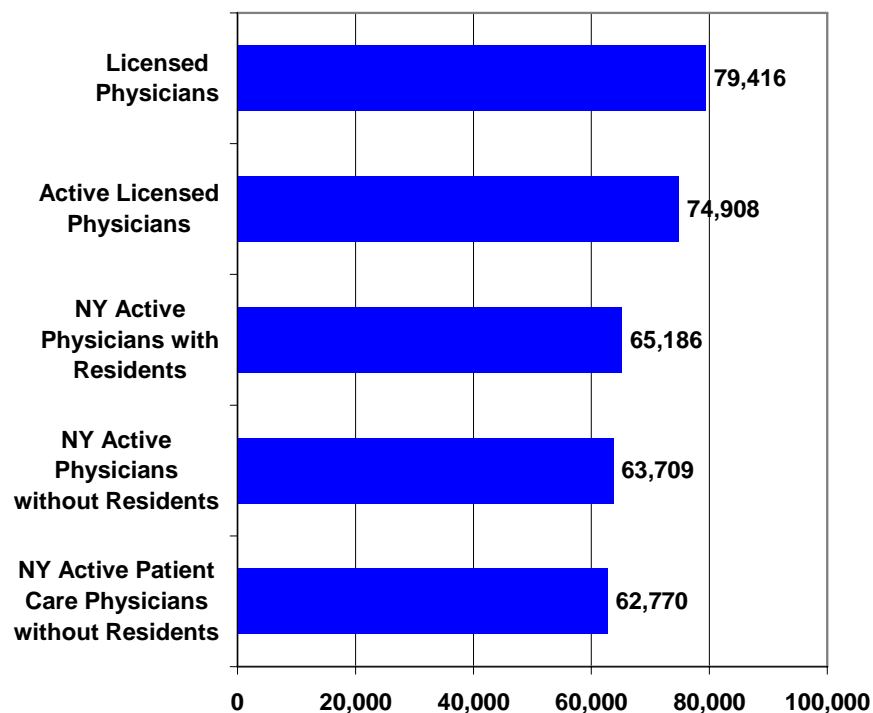
Introduction

Physicians are central to the delivery of health care to the citizens of New York. This report provides a variety of quantitative measures on the size, distribution, and characteristics of the physician workforce in New York. An effort has been made to present tables and charts that reveal patterns to help readers better understand the dynamics of the physician workforce and to design programs and policies to help improve access to health care in the state.

Physician Profile Overview

There were more than 79,000 licensed physicians in New York in 2006. Data for this profile were drawn from the Center's ongoing New York Physician Licensure Re-registration Survey.

Figure 1 – Estimated Number of Physicians in New York, 2006

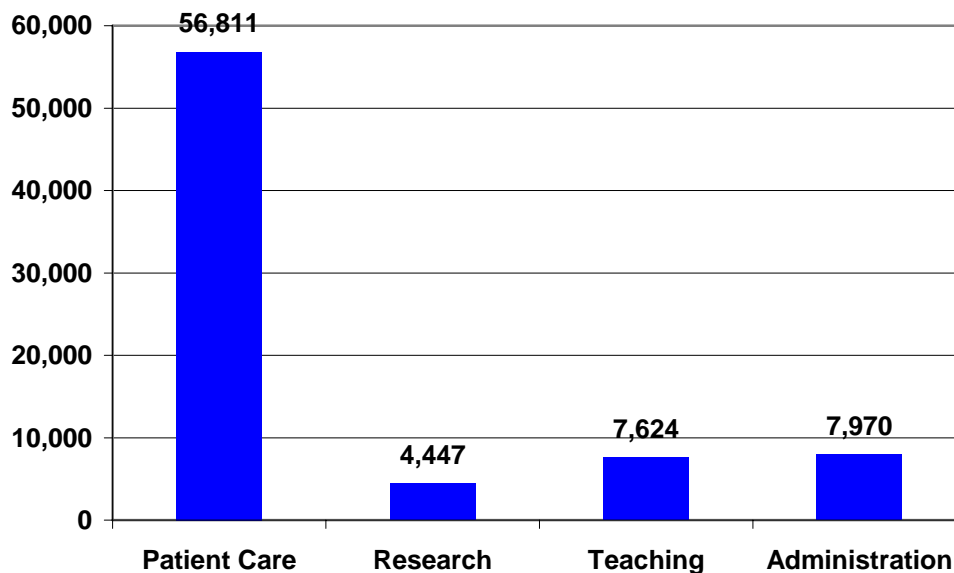


Source: Center for Health Workforce Studies, 2008.

In 2006, there were 79,416 licensed physicians in New York. Of these, 62,770 (80%) were active patient care physicians (excluding residents) in New York. Another 12,138 physicians were active but did not practice in New York or were residents or did not report any patient care hours.

Figure 2 presents the estimated number of full-time equivalent²⁸ (FTE) physicians engaged in patient care and non-patient care activities. The figure shows clearly that patient care occupies the majority of physicians' time in New York. The second most time was spent in administration, followed by teaching and then research.

Figure 2 – Estimated Number of FTE Physicians in New York by Activities in Medicine



Source: Center for Health Workforce Studies, 2008.

The county with the largest percentage of active patient care physicians was New York (25% of all physicians in the state), while one county, Hamilton, had less than 5 active physicians. Estimated counts for each of the 62 counties in the state are provided in Table 1.

The region with the largest percentage of active patient care physicians was New York City (50%), followed by Long Island (16%). The Mohawk Valley and North Country both had 1% of all the active patient care physicians in the state.

²⁸ Full-time equivalents were calculated as follows: number of hours per week spent in activity divided by 40.

Table 1 – Estimated Number of Active Physicians in New York by County, 2006.

Region/County	Patient Care		Patient Care		Research		Teaching		Administration	
	Physicians	% of NY	FTEs	% of NY	FTEs	% of NY	FTEs	% of NY	FTEs	% of NY
Capital District	2,705	4%	2,636	5%	93	2%	226	3%	340	4%
Albany	1,286	2%	1,219	2%	71	2%	159	2%	179	2%
Columbia	120	0%	120	0%	2	0%	4	0%	15	0%
Greene	40	0%	40	0%	1	0%	1	0%	7	0%
Rensselaer	260	0%	263	0%	6	0%	10	0%	31	0%
Saratoga	310	0%	313	1%	7	0%	13	0%	28	0%
Schenectady	422	1%	411	1%	5	0%	28	0%	51	1%
Warren	233	0%	242	0%	2	0%	9	0%	22	0%
Washington	33	0%	28	0%	0	0%	1	0%	6	0%
Central New York	1,794	3%	1,721	3%	86	2%	236	3%	218	3%
Cayuga	104	0%	104	0%	0	0%	5	0%	12	0%
Cortland	69	0%	75	0%	1	0%	2	0%	7	0%
Onondaga	1,509	2%	1,423	3%	82	2%	224	3%	190	2%
Oswego	112	0%	119	0%	3	0%	5	0%	10	0%
Finger Lakes	3,172	5%	2,870	5%	286	6%	379	5%	426	5%
Genesee	90	0%	97	0%	1	0%	6	0%	11	0%
Livingston	72	0%	73	0%	0	0%	4	0%	9	0%
Monroe	2,524	4%	2,216	4%	276	6%	349	5%	355	4%
Ontario	262	0%	259	0%	4	0%	11	0%	29	0%
Orleans	37	0%	38	0%	1	0%	1	0%	4	0%
Seneca	24	0%	20	0%	0	0%	1	0%	3	0%
Wayne	80	0%	81	0%	1	0%	3	0%	7	0%
Wyoming	51	0%	55	0%	0	0%	2	0%	5	0%
Yates	32	0%	32	0%	2	0%	3	0%	4	0%
Hudson Valley	7,192	11%	6,679	12%	300	7%	508	7%	843	11%
Dutchess	727	1%	688	1%	19	0%	27	0%	89	1%
Orange	783	1%	797	1%	19	0%	26	0%	79	1%
Putnam	239	0%	244	0%	5	0%	10	0%	26	0%
Rockland	922	1%	863	2%	35	1%	41	1%	99	1%
Sullivan	118	0%	120	0%	1	0%	2	0%	11	0%
Ulster	363	1%	349	1%	9	0%	23	0%	39	0%
Westchester	4,039	6%	3,618	6%	213	5%	379	5%	501	6%
Long Island	9,860	16%	9,377	17%	418	9%	1,004	13%	1,118	14%
Nassau	6,058	10%	5,728	10%	268	6%	678	9%	694	9%
Suffolk	3,802	6%	3,650	6%	151	3%	326	4%	424	5%
Mohawk Valley	839	1%	847	1%	8	0%	40	1%	92	1%
Fulton	72	0%	76	0%	1	0%	2	0%	6	0%
Herkimer	51	0%	51	0%	0	0%	1	0%	4	0%
Madison	105	0%	103	0%	1	0%	5	0%	10	0%
Montgomery	91	0%	97	0%	1	0%	2	0%	8	0%
Oneida	496	1%	497	1%	4	0%	27	0%	60	1%
Schoharie	24	0%	22	0%	1	0%	2	0%	3	0%
New York City	31,415	50%	26,989	48%	3,034	68%	4,680	61%	4,256	53%
Bronx	3,832	6%	3,205	6%	353	8%	655	9%	548	7%
Kings	6,373	10%	5,779	10%	286	6%	881	12%	804	10%
New York	15,504	25%	12,821	23%	2,218	50%	2,502	33%	2,219	28%
Queens	4,524	7%	4,041	7%	138	3%	485	6%	549	7%
Richmond	1,182	2%	1,142	2%	39	1%	156	2%	135	2%
North Country	769	1%	782	1%	9	0%	33	0%	76	1%
Clinton	207	0%	209	0%	2	0%	6	0%	20	0%
Essex	39	0%	37	0%	1	0%	1	0%	3	0%
Franklin	101	0%	97	0%	3	0%	3	0%	10	0%
Hamilton	--	--	--	--	--	--	--	--	--	--
Jefferson	208	0%	215	0%	3	0%	16	0%	20	0%
Lewis	34	0%	36	0%	0	0%	1	0%	3	0%
St. Lawrence	179	0%	188	0%	1	0%	4	0%	19	0%

Table 1 – Estimated Number of Active Physicians in New York by County, 2006. (cont)

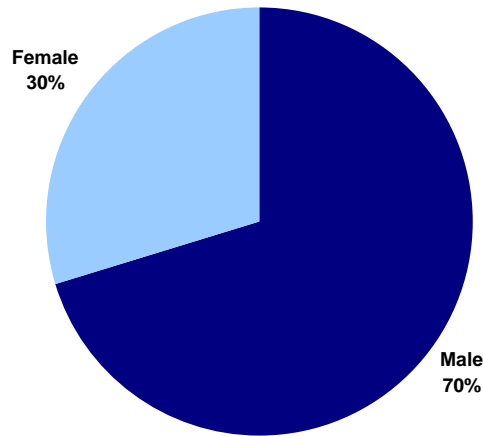
Region/County	Patient Care		Patient Care		Research		Teaching		Administration	
	Physicians	% of NY	FTEs	% of NY	FTEs	% of NY	FTEs	% of NY	FTEs	% of NY
Southern Tier	1,689	3%	1,730	3%	34	1%	128	2%	204	3%
Broome	560	1%	555	1%	14	0%	60	1%	61	1%
Chemung	267	0%	296	1%	4	0%	9	0%	30	0%
Chenango	62	0%	60	0%	0	0%	3	0%	8	0%
Delaware	45	0%	48	0%	1	0%	1	0%	3	0%
Otsego	293	0%	298	1%	8	0%	35	0%	47	1%
Schuyler	22	0%	23	0%	0	0%	1	0%	2	0%
Steuben	194	0%	206	0%	3	0%	9	0%	22	0%
Tioga	24	0%	23	0%	1	0%	3	0%	3	0%
Tompkins	221	0%	220	0%	4	0%	7	0%	28	0%
Western New York	3,334	5%	3,178	6%	178	4%	390	5%	396	5%
Allegany	45	0%	45	0%	0	0%	1	0%	3	0%
Cattaraugus	116	0%	122	0%	2	0%	6	0%	11	0%
Chautauqua	215	0%	238	0%	2	0%	10	0%	19	0%
Erie	2,650	4%	2,460	4%	168	4%	355	5%	331	4%
Niagara	308	0%	314	1%	6	0%	18	0%	31	0%
Total	62,770	100%	56,811	100%	4,447	100%	7,624	100%	7,970	100%

Source: Center for Health Workforce Studies, 2008.

Physician Demographics

Physicians in New York were predominantly male (70%) as shown in Figure 3. The representation of women varied greatly by specialty. Pediatrics had the largest contingent of women (54%). Primary care specialists and obstetrics/gynecology were among the specialties with the greatest proportion of women. Surgery and its related subspecialties had the smallest representation of women.

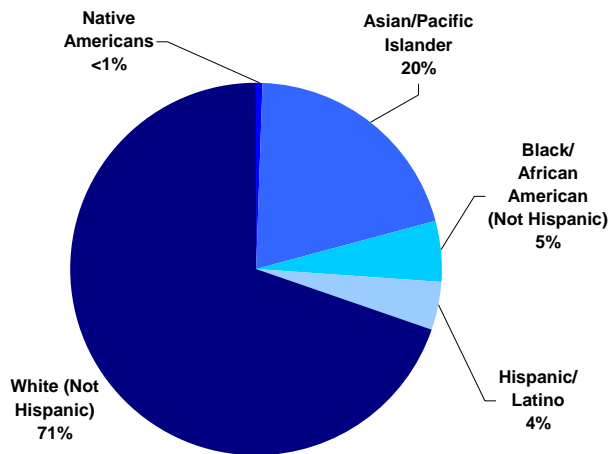
Figure 3 – Gender of Active Patient Care Physicians in New York, 2006



Source: Center for Health Workforce Studies, 2008.

Figure 4 shows the racial/ethnic composition of New York’s physicians. The majority of physicians (71%) were non-Hispanic White. Asian/Pacific Islander physicians made up the second largest group, representing about 20% of physicians. Blacks/African Americans made up 5% of physicians, and Hispanics/Latinos made up only 4% of physicians.

Figure 4 – Race/Ethnicity of Active Patient Care Physicians in New York, 2006



Source: Center for Health Workforce Studies, 2008.

The representation of underrepresented minorities varied considerably by specialty (Table 2). Preventive medicine, obstetrics and gynecology, and child and adolescent psychology had the largest proportions of underrepresented minorities. Allergy and immunology had the smallest representation of underrepresented minorities.

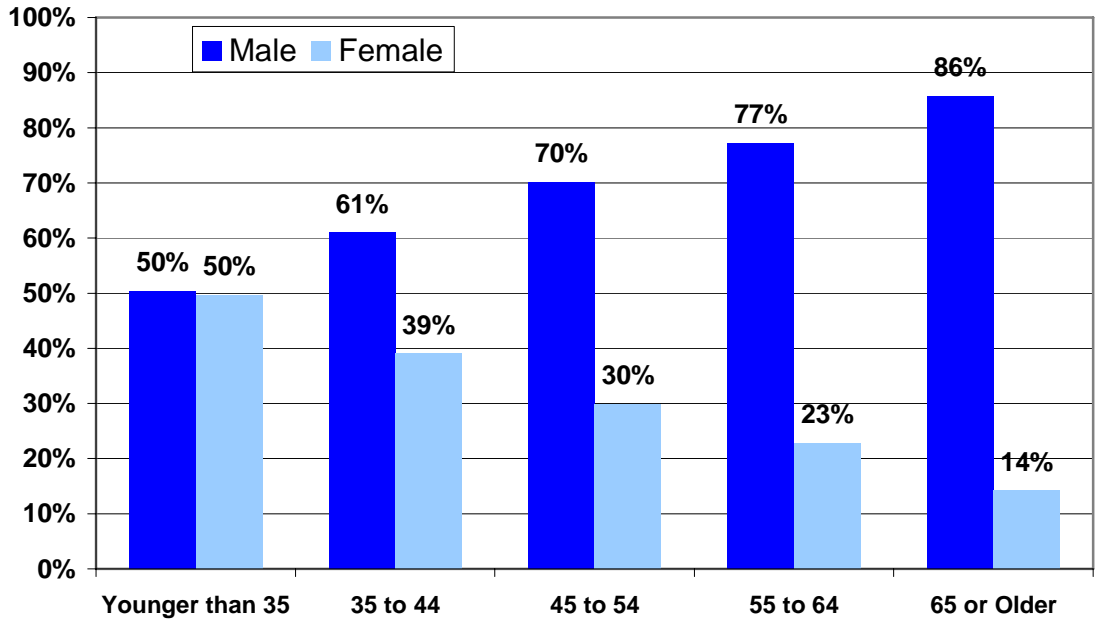
Table 2 – Gender, Race/Ethnicity, and IMG Status of Active Patient Care Physicians in New York by Specialty, 2006

Specialty	Active Patient Care Physicians	% Female	% Under-represented Minority	% International Medical Graduate
Primary Care	19,097	37%	13%	44%
Family Medicine (includes General Practice)	4,593	33%	14%	34%
Internal Medicine (General)	9,815	30%	12%	48%
Pediatrics (General)	4,689	54%	15%	46%
Obstetrics and Gynecology	3,399	42%	16%	31%
Obstetrics and Gynecology	2,588	43%	18%	30%
Gynecology	811	37%	10%	35%
IM Specialties	8,603	23%	7%	32%
Cardiovascular Disease	2,266	11%	6%	30%
Critical Care	286	22%	13%	49%
Endocrinology and Metabolism	604	39%	7%	32%
Gastroenterology	1,283	13%	5%	27%
Geriatrics	408	45%	11%	42%
Infectious Disease	670	40%	10%	28%
Medical Oncology	1,063	30%	4%	32%
Nephrology	684	23%	8%	39%
Pulmonary Disease	762	19%	6%	35%
Rheumatology	406	35%	5%	22%
Other IM Specialties	172	35%	7%	26%
Surgery (General)	1,586	11%	13%	40%
Surgical Specialties	6,994	11%	6%	17%
Ophthalmology	1,871	19%	4%	12%
Otolaryngology	723	11%	4%	18%
Surgery, Neurological	314	5%	7%	19%
Surgery, Orthopedic	1,573	4%	6%	14%
Surgery, Plastic	649	13%	8%	18%
Surgery, Thoracic	327	5%	12%	26%
Urology	851	4%	7%	27%
Other Surgical Specialties	688	16%	7%	19%
Facility Based	7,551	28%	7%	39%
Anesthesiology	3,146	24%	9%	49%
Pathology (General and Sub-specialty)	1,362	40%	8%	52%
Radiology (Diagnostic and Therapeutic)	3,044	26%	5%	24%
Psychiatrists	6,439	35%	11%	39%
Psychiatry-Adult	5,482	33%	10%	40%
Psychiatry-Child & Adolescent	957	46%	15%	36%
Other	9,100	33%	9%	31%
Allergy and Immunology	450	36%	3%	32%
Dermatology	1,054	37%	5%	10%
Emergency Medicine	2,146	25%	14%	25%
Neurology	1,348	26%	6%	35%
Occupational Medicine	186	25%	13%	22%
Pediatric Sub-specialty	1,696	50%	11%	36%
Physical Medicine and Rehabilitation	1,060	35%	10%	51%
Preventive Medicine	115	34%	19%	19%
Other	1,046	28%	8%	32%
Total	62,770	30%	10%	36%

Source: Center for Health Workforce Studies, 2008.

Reflecting the growing number of women entering the medical profession, female physicians were significantly younger than men in 2006, constituting 50% of physicians younger than age 35, but only 14% of physicians older than age 65 (Figure 5). Overall, 67% of physicians were age 45 or older. Fourteen percent of physicians in New York were older than age 65. The median age for all physicians in New York was 51, although this varied by gender. The median age for females was only 47, compared to 53 for male physicians.

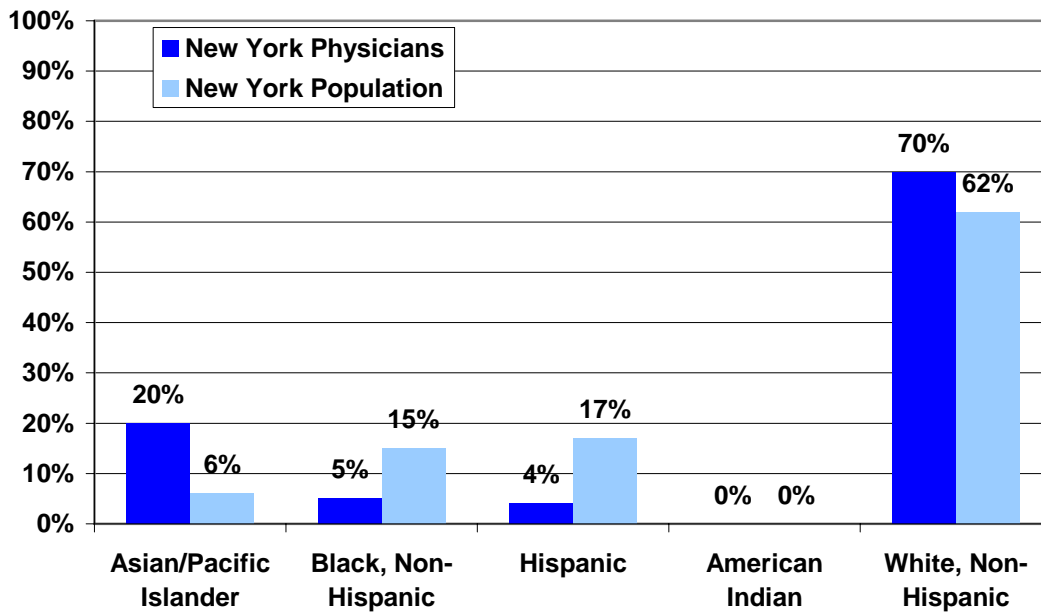
Figure 5 – Gender of Active Patient Care Physicians in New York by Age, 2006



Source: Center for Health Workforce Studies, 2008.

Comparing New York’s physician workforce to the state’s population resulted in several meaningful findings (Figure 6). In terms of minority populations, both Blacks/African Americans and Hispanics/Latinos made up much larger parts of the general population than they did of the physician population, whereas Asians/Pacific Islanders were greatly overrepresented in the physician population relative to the general population.

Figure 6 – Race/Ethnicity of Active Patient Care Physicians in New York Compared to New York Population, 2006

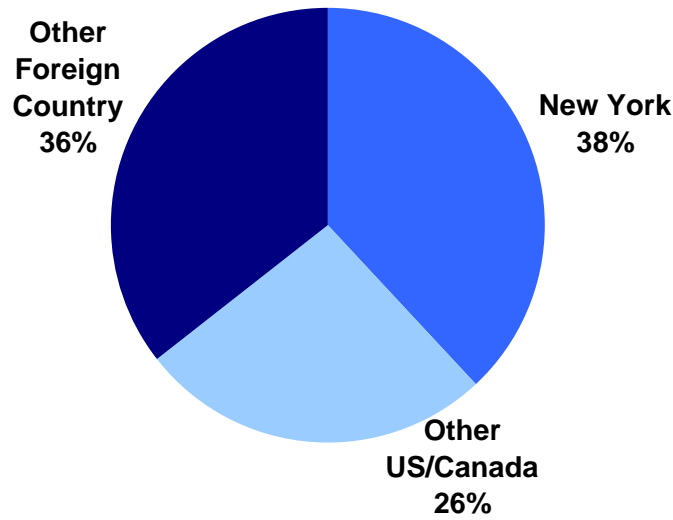


Sources: Center for Health Workforce Studies, 2008; Claritas, 2006.

Medical Education and Training

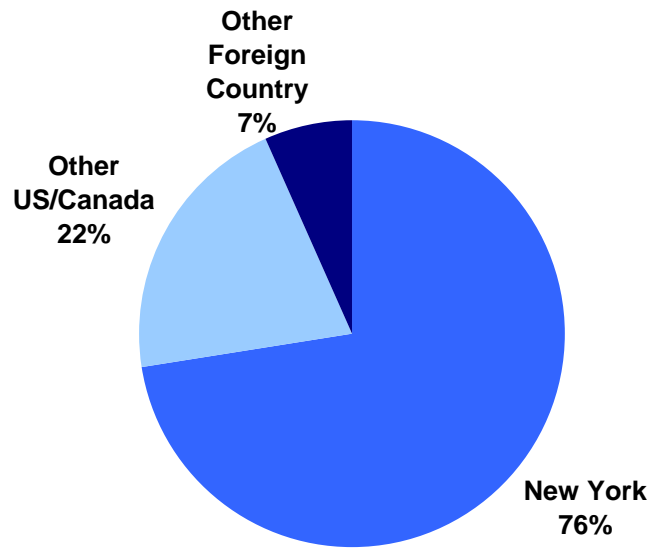
New York imported the majority of its physicians from outside the state (about 62% attended a medical school outside the state). The proportion having attended medical school in New York was 38% of the total. About 36% of physicians in New York were international medical graduates (IMGs) who graduated from a medical school in a foreign country (other than Canada) (Figure 7). Of those active patient care physicians who attended medical school in New York, 15% attended the State University of New York Downstate Medical Center College of Medicine. Almost all of the active patient care physicians in New York completed residency/training in their principal specialty in the U.S., with approximately 76% in New York and 22% in another state in the U.S. or Canada (Figure 8).

Figure 7 – Location of Medical Education of Active Patient Care Physicians in New York, 2006



Source: Center for Health Workforce Studies, 2008.

Figure 8 – Location of Primary Residency Training of Active Patient Care Physicians in New York, 2006



Source: Center for Health Workforce Studies, 2008.

Table 3 – Medical School Attended of Active Patient Care Physicians who Attended Medical School in New York, 2006

Medical School	%
Albany Medical College	5%
Albert Einstein College of Medicine of Yeshiva University	10%
Columbia University College of Physicians and Surgeons	7%
Weill Cornell Medical College	5%
Mount Sinai School of Medicine of New York University	6%
New York College of Osteopathic Medicine of New York Institute of Technology	6%
New York Medical College	11%
New York University School of Medicine	10%
State University of New York Downstate Medical Center College of Medicine	15%
University of Buffalo, State University of New York, School of Medicine and Biomedical Sciences	8%
Stony Brook University School of Medicine	4%
State University of New York Upstate Medical University College of Medicine	8%
University of Rochester School of Medicine and Dentistry	4%
Total	100%

Source: Center for Health Workforce Studies, 2008.

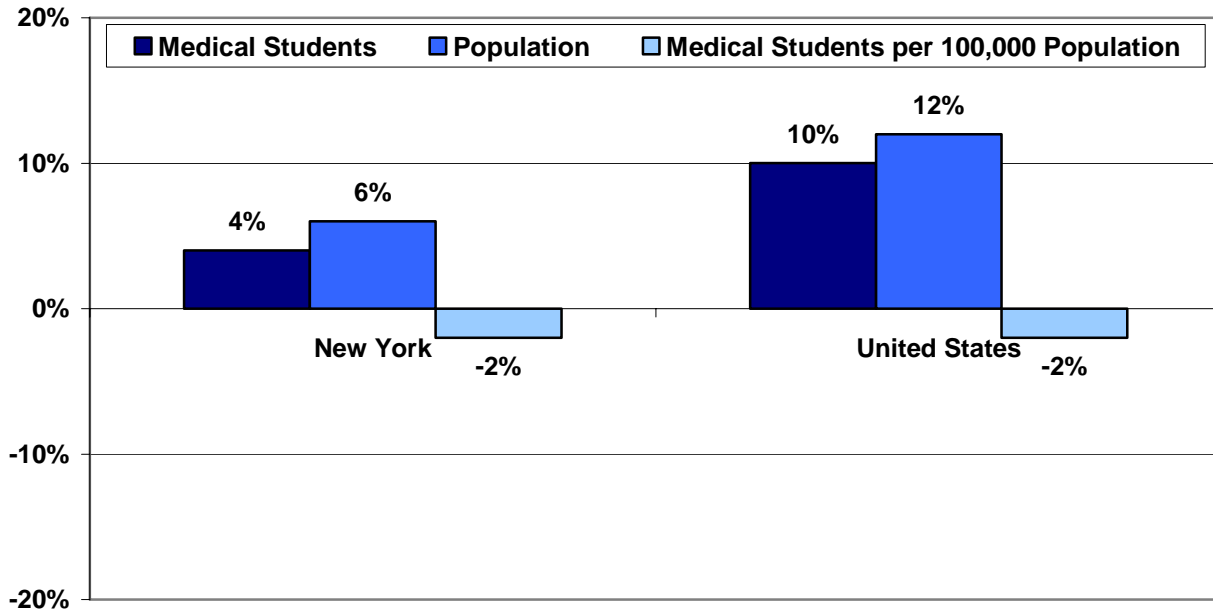
Table 4 – Estimated Number of Students Enrolled in New York Medical Schools by Institution, 2002/03-2006/07

Medical School	2002/03	2003/04	2004/05	2005/06	2006/07
Albany Medical College	508	514	522	538	542
Albert Einstein College of Medicine of Yeshiva University	722	730	735	732	759
Columbia University College of Physicians and Surgeons	597	605	617	604	610
Weill Cornell Medical College	416	412	398	410	405
Mount Sinai School of Medicine of New York University	450	467	480	477	487
New York College of Osteopathic Medicine of New York Institute of Technology	1,147	1,161	1,151	1,176	1,201
New York Medical College	769	767	767	760	774
New York University School of Medicine	703	675	702	703	658
State University of New York Downstate Medical Center College of Medicine	775	773	779	769	773
University of Buffalo, State University of New York, School of Medicine and Biomedical Sciences	554	578	542	555	568
Stony Brook University School of Medicine	434	428	439	447	438
State University of New York Upstate Medical University College of Medicine	644	633	618	615	611
University of Rochester School of Medicine and Dentistry	388	414	405	385	382
Total	8,107	8,157	8,155	8,171	8,208

Sources: Appendix IA, Table 2. *Journal of the American Medical Association Medical Education Theme Issues, 1997-2008. 1997-2008 Annual Reports on Osteopathic Medical Education.* Chevy Chase, MD: American Association of Colleges of Osteopathic Medicine.

Table 4 shows recent trends in medical school enrollment at institutions across the state. Overall, the number of students enrolled in New York medical schools increased by less than 2% between 2002-03 and 2006-07.

Figure 9 – Percent Change in Number of Medical School Students, Population and Students per 100,000 Population in New York and the U.S., 1996/97-2006/07



Sources: Appendix IA, Table 2, *Journal of the American Medical Association Medical Education Theme Issues, 1997-2008*. *1997-2008 Annual Reports on Osteopathic Medical Education*. Chevy Chase, MD: American Association of Colleges of Osteopathic Medicine; Center for Health Workforce Studies, 2008; U.S. Census Bureau, 2008.

Figure 9 compares the growth in medical enrollment, population, and medical enrollment per 100,000 population between 1996-97 and 2006-07 academic years in New York and the U.S. The number of medical students per 100,000 population declined by 2% for both New York and the U.S. over this 10-year time period. Overall, the number of medical students in New York grew by 4% and the state’s population grew by 6% during this time.

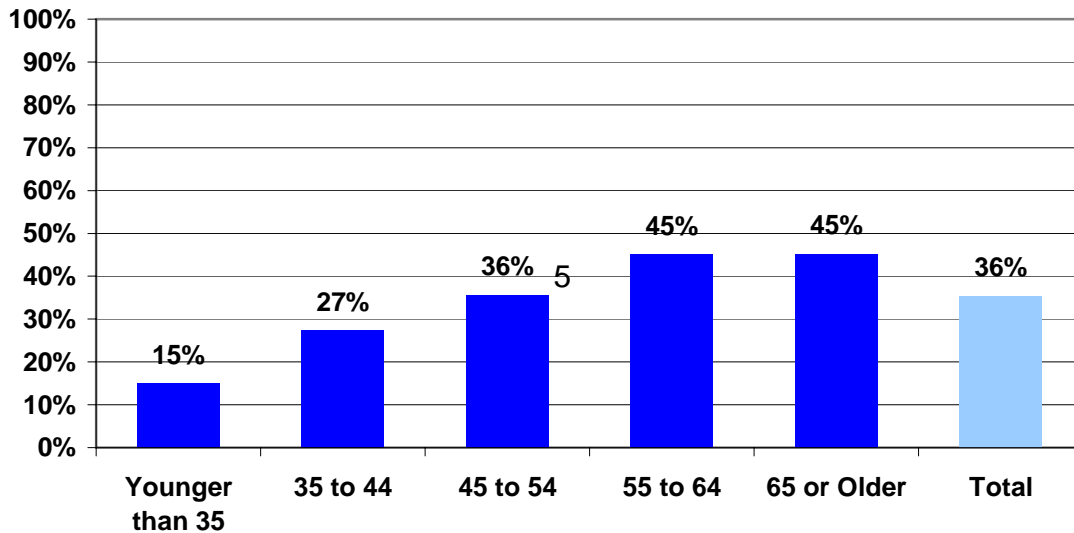
Table 5 shows the proportion of physicians who attended medical school in New York and those who received residency/fellowship training in their principal specialty in New York by principal specialty. More than half of New York’s active patient care dermatologists, ophthalmologists, gastroenterologists, and rheumatologists attended medical school in New York. More than 80% of New York’s active patient care psychiatrists, adult psychiatrists, general pediatricians, general internists, and child and adolescent psychiatrists completed graduate medical training in New York.

Table 5 – Location of Medical School and Residency Training of Active Patient Care Physicians in New York by Specialty, 2006

Specialty	Active Patient Care Physicians	% Attended Medical School in New York	% with Residency/ Fellowship Training in NY
Primary Care	19,097	35%	79%
Family Medicine (includes General Practice)	4,593	38%	72%
Internal Medicine (General)	9,815	34%	81%
Pediatrics (General)	4,689	35%	82%
Obstetrics and Gynecology	3,399	40%	78%
Obstetrics and Gynecology	2,588	41%	79%
Gynecology	811	37%	74%
IM Specialties	8,603	42%	76%
Cardiovascular Disease	2,266	44%	75%
Critical Care	286	26%	77%
Endocrinology and Metabolism	604	44%	74%
Gastroenterology	1,283	51%	77%
Geriatrics	408	31%	79%
Infectious Disease	670	38%	75%
Medical Oncology	1,063	36%	74%
Nephrology	684	37%	76%
Pulmonary Disease	762	38%	78%
Rheumatology	406	51%	76%
Other IM Specialties	172	38%	72%
Surgery (General)	1,586	33%	74%
Surgical Specialties	6,994	47%	69%
Ophthalmology	1,871	56%	78%
Otolaryngology	723	46%	67%
Surgery, Neurological	314	43%	64%
Surgery, Orthopedic	1,573	50%	68%
Surgery, Plastic	649	44%	65%
Surgery, Thoracic	327	34%	65%
Urology	851	42%	74%
Other Surgical Specialties	688	39%	55%
Facility Based	7,551	35%	73%
Anesthesiology	3,146	32%	78%
Pathology (General and Sub-specialty)	1,362	22%	68%
Radiology (Diagnostic and Therapeutic)	3,044	44%	70%
Psychiatrists	6,439	34%	83%
Psychiatry-Adult	5,482	34%	83%
Psychiatry-Child & Adolescent	957	34%	81%
Other	9,100	39%	74%
Allergy and Immunology	450	40%	73%
Dermatology	1,054	56%	72%
Emergency Medicine	2,146	42%	73%
Neurology	1,348	33%	77%
Occupational Medicine	186	41%	59%
Pediatric Sub-specialty	1,696	35%	71%
Physical Medicine and Rehabilitation	1,060	31%	84%
Preventive Medicine	115	39%	66%
Other	1,046	36%	69%
Total	62,770	38%	76%

Source: Center for Health Workforce Studies, 2008.

Figure 10 – Percentage of International Medical School Graduates of Active Patient Care Physicians in New York by Age, 2006



Source: Center for Health Workforce Studies, 2008.

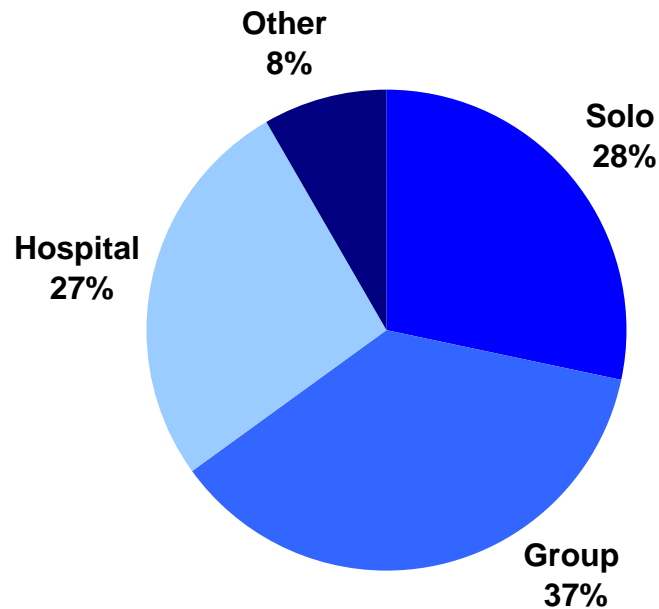
Additionally, there were significant variations in the proportion of IMGs by specialty, with two specialties, pathology and physical medicine and rehabilitation, having more than 50%. Several specialties were made up of fewer than 20% IMGs, including dermatology, ophthalmology, orthopedic surgery, otolaryngology, neurological surgery, and preventive medicine (Table 2).

IMGs made up a larger percentage of the older active patient care physician workforce in 2006 (Figure 10). While comprising only 36% of the overall active patient care physician workforce, IMGs made up 45% of active patient care physicians age 55 and older.

Practice Setting

Group practices were the most frequent principal settings of active care physicians in New York in 2006, with 37% of physicians practicing in group settings. The next two most frequent settings were solo practice (28%) and hospital based (27%) settings. Very few patient care physicians in New York (8%) practiced in other settings.

Figure 11 – Principal Practice Setting of Active Patient Care Physicians in New York, 2006



Source: Center for Health Workforce Studies, 2008.

Practice Specialty

In 2006, almost one-third of active patient care physicians in New York practiced in one of the primary care disciplines as their principal specialty. Family medicine, general internal medicine, and general pediatrics were selected by 30% of the active patient care physicians in the state as their principal specialty. More patient care physicians in New York were specialists in general internal medicine than any other specialty. Almost 10,000 active patient care physicians (16% of the total physician supply) indicated that general internal medicine was their principal specialty. This was followed by adult psychiatry (9%), family medicine (7%), and general pediatrics (7%). Table 6 presents the estimated numbers and percentages of active patient care physicians by specialty in New York in 2006.

Table 6 – Principal Specialty of Active Patient Care Physicians in New York, 2006

Specialty	Active Patient Care Physicians	% of Active Patient Care Physicians in NY
Primary Care	19,097	30%
Family Medicine (includes General Practice)	4,593	7%
Internal Medicine (General)	9,815	16%
Pediatrics (General)	4,689	7%
Obstetrics and Gynecology	3,399	5%
Obstetrics and Gynecology	2,588	4%
Gynecology	811	1%
IM Specialties	8,603	14%
Cardiovascular Disease	2,266	4%
Critical Care	286	0%
Endocrinology and Metabolism	604	1%
Gastroenterology	1,283	2%
Geriatrics	408	1%
Infectious Disease	670	1%
Medical Oncology	1,063	2%
Nephrology	684	1%
Pulmonary Disease	762	1%
Rheumatology	406	1%
Other IM Specialties	172	0%
Surgery (General)	1,586	3%
Surgical Specialties	6,994	11%
Ophthalmology	1,871	3%
Otolaryngology	723	1%
Surgery, Neurological	314	0%
Surgery, Orthopedic	1,573	3%
Surgery, Plastic	649	1%
Surgery, Thoracic	327	1%
Urology	851	1%
Other Surgical Specialties	688	1%
Facility Based	7,551	12%
Anesthesiology	3,146	5%
Pathology (General and Sub-specialty)	1,362	2%
Radiology (Diagnostic and Therapeutic)	3,044	5%
Psychiatrists	6,439	10%
Psychiatry-Adult	5,482	9%
Psychiatry-Child & Adolescent	957	2%
Other	9,100	14%
Allergy and Immunology	450	1%
Dermatology	1,054	2%
Emergency Medicine	2,146	3%
Neurology	1,348	2%
Occupational Medicine	186	0%
Pediatric Sub-specialty	1,696	3%
Physical Medicine and Rehabilitation	1,060	2%
Preventive Medicine	115	0%
Other	1,046	2%
Total	62,770	100%

Source: Center for Health Workforce Studies, 2008.

Table 7 – Estimated Number of Active Patient Care Physicians in New York by County, 2006

Region/County	Active Patient Care Physicians	Population	Active Patient Care Physicians per 100,000 Pop.	Primary Care Physicians per 100,000 Pop.	Non-Primary Care Physicians per 100,000 Pop.
Capital District	2,705	1,063,621	254	94	160
Albany	1,286	299,894	429	127	301
Columbia	120	64,037	187	73	112
Greene	40	49,642	81	50**	30**
Rensselaer	260	155,064	168	83	86
Saratoga	310	216,639	143	74	69**
Schenectady	422	148,879	284	104	179
Warren	233	65,816	354	122	232
Washington	33	63,650	52	42**	9**
Central New York	1,794	716,032	251	83	168
Cayuga	104	81,941	127	44**	84**
Cortland	69	49,201	140	67	73**
Onondaga	1,509	460,562	328	100	227
Oswego	112	124,328	90	51**	40**
Finger Lakes	3,172	1,205,419	263	103	160
Genesee	90	59,489	151	72	79**
Livingston	72	65,003	111	69	42**
Monroe	2,524	735,248	343	125	218
Ontario	262	104,664	250	84	166
Orleans	37	44,284	83	47**	34**
Seneca	24	35,288	67	51**	17**
Wayne	80	93,862	86	60	27**
Wyoming	51	42,867	119	70	49**
Yates	32	24,714	129	85	45**
Hudson Valley	7,192	2,281,845	315	111	204
Dutchess	727	297,426	244	90	154
Orange	783	379,931	206	82	124
Putnam	239	102,026	234	88	146
Rockland	922	295,447	312	105	207
Sullivan	118	77,208	153	74	80**
Ulster	363	182,907	199	91	108
Westchester	4,039	946,900	427	140	287
Long Island	9,860	2,831,266	348	114	235
Nassau	6,058	1,340,513	452	138	314
Suffolk	3,802	1,490,753	255	92	163
Mohawk Valley	839	507,194	165	72	93
Fulton	72	55,675	130	74	56**
Herkimer	51	63,865	80	58**	22**
Madison	105	70,750	149	75	73**
Montgomery	91	49,260	185	75	110
Oneida	496	235,430	211	78	133
Schoharie	24	32,214	73	47**	25**
New York City	31,415	8,119,187	387	130	257
Bronx	3,832	1,372,440	279	112	167
Kings	6,373	2,472,045	258	113	145
New York	15,504	1,571,049	987	233	754
Queens	4,524	2,234,739	202	94	109
Richmond	1,182	468,914	252	92	160
North Country	769	425,633	181	75	106
Clinton	207	82,591	251	92	159
Essex	39	38,835	101	49**	51**
Franklin	101	51,015	197	98	100
Hamilton	--	5,183	--	--	--
Jefferson	208	110,247	189	73	116
Lewis	34	26,470	130	64	68**
St. Lawrence	179	111,292	161	67	93

Table 7 – Estimated Number of Active Patient Care Physicians in New York by County, 2006 (cont.)

County	Physicians	Population	Active Patient Care Physicians per 100,000 Pop.	Primary Care Physicians per 100,000 Pop.	Non-Primary Care Physicians per 100,000 Pop.
Southern Tier	1,689	719,143	235	93	142
Broome	560	196,463	285	106	179
Chemung	267	89,571	299	102	196
Chenango	62	52,108	118	75	42**
Delaware	45	47,253	95	63	32**
Otsego	293	62,805	467	132	336
Schuyler	22	19,580	115	72	41**
Steuben	194	98,602	197	83	114
Tioga	24	51,391	46	41**	4**
Tompkins	221	101,370	218	97	121
Western New York	3,334	1,420,166	235	87	148
Allegany	45	50,703	89	55**	34**
Cattaraugus	116	83,002	140	52**	88
Chautauqua	215	136,475	158	71	86
Erie	2,650	932,217	284	100	185
Niagara	308	217,769	141	61	80
Total	62,770	19,289,506	325	99	226

* In this table, primary care includes: general/family medicine, general internal medicine, general pediatrics, and obstetrics and gynecology. The inclusion of Obstetrics and Gynecology was necessary to match the federal definition of primary care upon which shortage designations are made.

**Falls below HPSA threshold for designation as a shortage area.

***Falls below COGME recommended physician to population ratios.

Sources: Center for Health Workforce Studies, 2008; Claritas, 2006.

Potential Shortage Areas

In 2006, the Mohawk Valley region had the lowest number of active patient care physicians per 100,000 population (165 per 100,000). New York City had the highest number of active patient care physicians per 100,000 population (387 per 100,000). As evident in Table 7, there were several counties that fell well below established benchmarks of adequate physician supply.

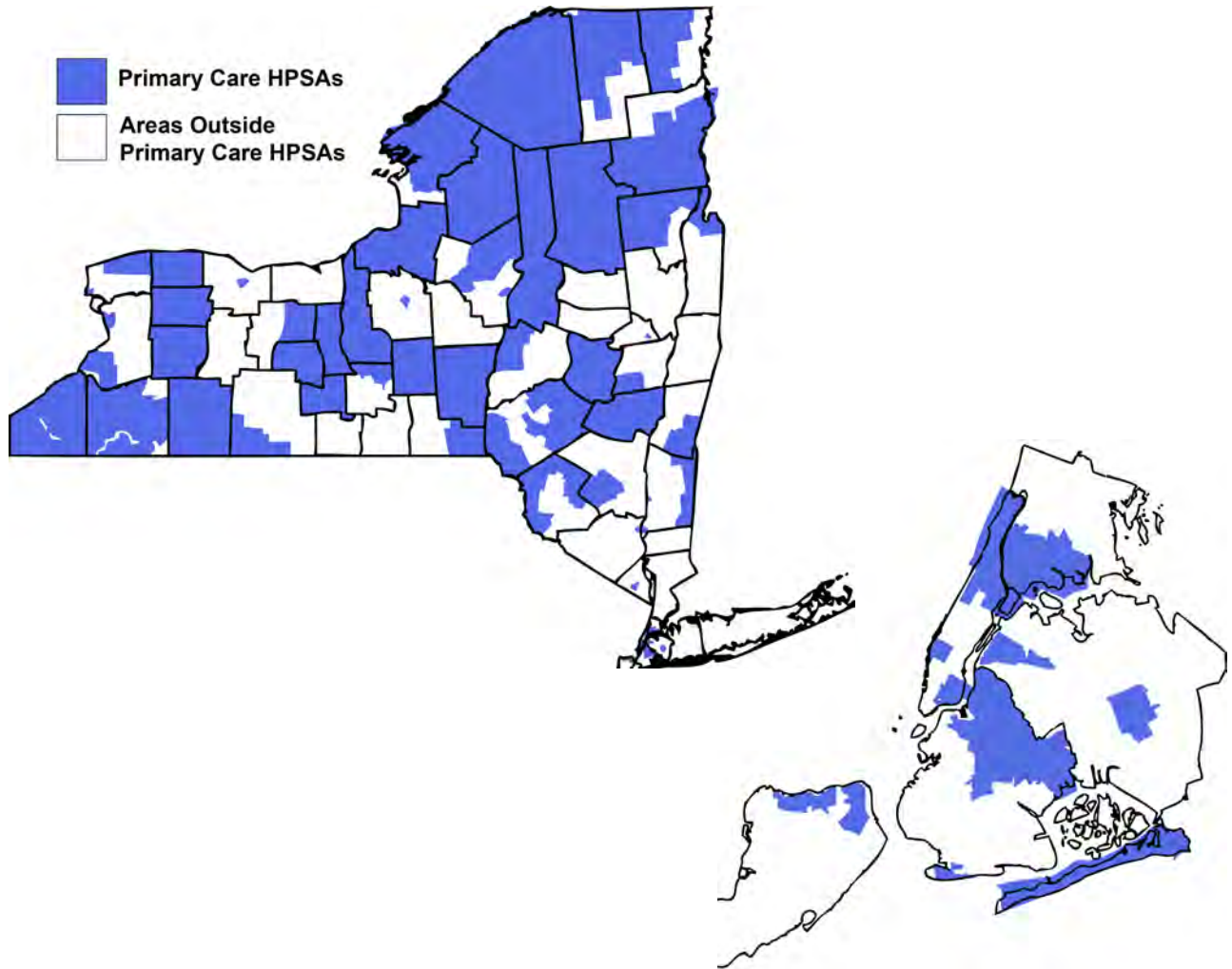
In the mid-1990s, the Council on Graduate Medical Education (COGME) developed physician supply recommendations. Based on the results of a meta-analysis of a handful of national level physician requirement studies, COGME recommended ratios of 60-80 primary care physicians per 100,000 population and 85-105 non-primary care physicians per 100,000.

Table 7 provides the active patient care physicians and primary care physicians per 100,000 resident population by county. As shown in the table, a number of counties in New York fell below the provider-to-population ratios recommended by the COGME. While this method of identifying shortage areas was crude, it did indicate there were certain areas of the state that deserved more attention than others in terms of the current physician supply.

Designated Shortage Areas

Map 1 shows the federally-designated primary care health professional shortages areas in New York in 2007.

Map 1 – Primary Care Health Professional Shortage Areas in New York, 2007



Sources: Data on designated HPSAs obtained from the Division of Shortage Designation, Health Resources and Services Administration, U.S. Department of Health and Human Services: <http://hpsafind.hrsa.gov/> (accessed 08/06/2007).

Chapter 5: Profile of Medical Education and Training in New York

Introduction

For most states, the two main sources of physicians are physicians who attended medical school in the state and those who obtained graduate medical training in the state. This chapter presents data on both of these sources in New York. Understanding the current status and historical trends in medical education and training is essential for understanding future changes in the supply of physicians in the state.

Undergraduate Medical Education

Currently, there are 14 medical schools in New York (Figure 1). Table 1 presents their vital statistics. Twelve of the schools are allopathic medical institutions; the others are schools of osteopathic medicine. Among these 14 schools, a total of 8,183 medical students were enrolled during the 2006/07 academic year.

Figure 1 – New York Medical Schools, 2007

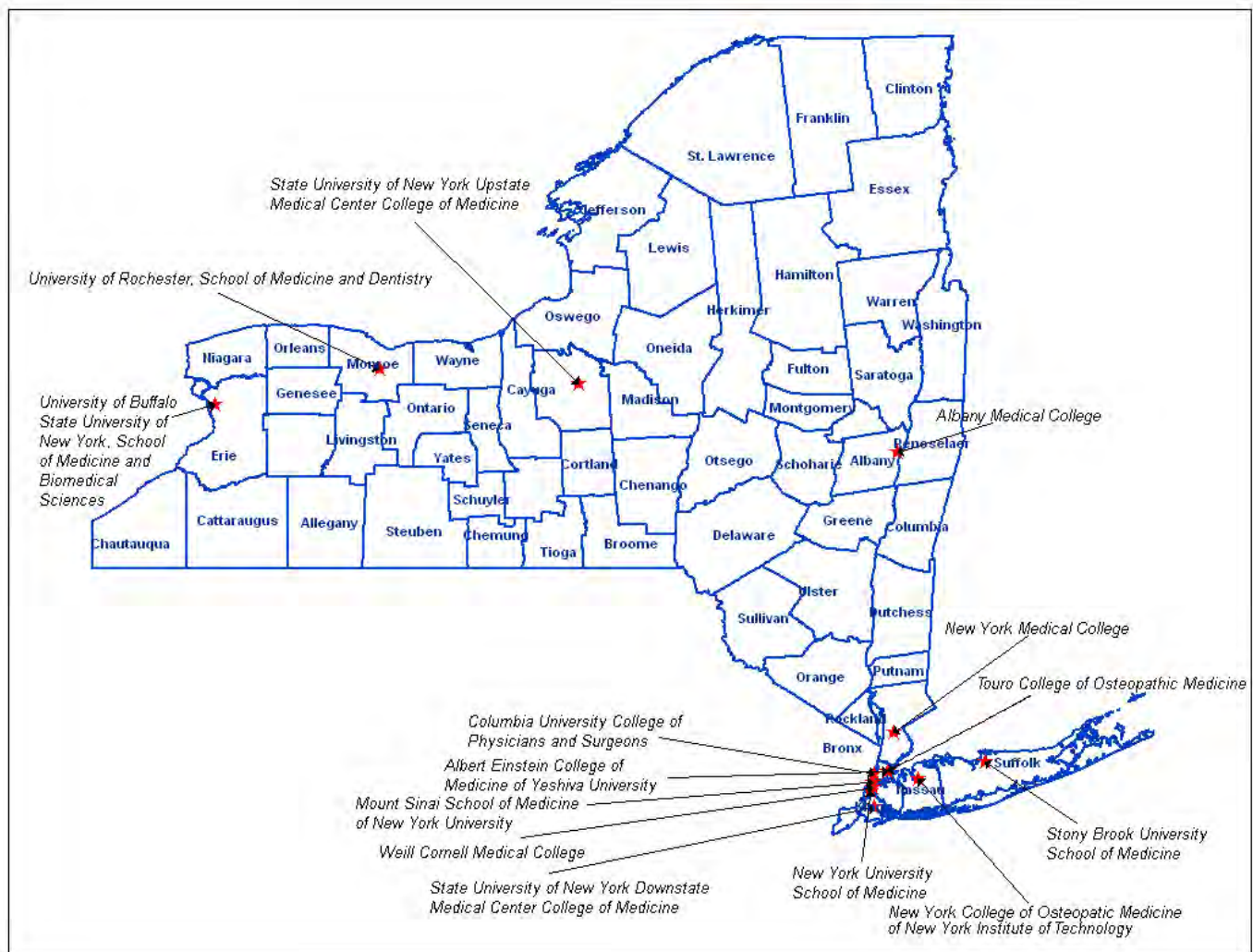


Table 1 – New York Medical School Characteristics, 2006/07

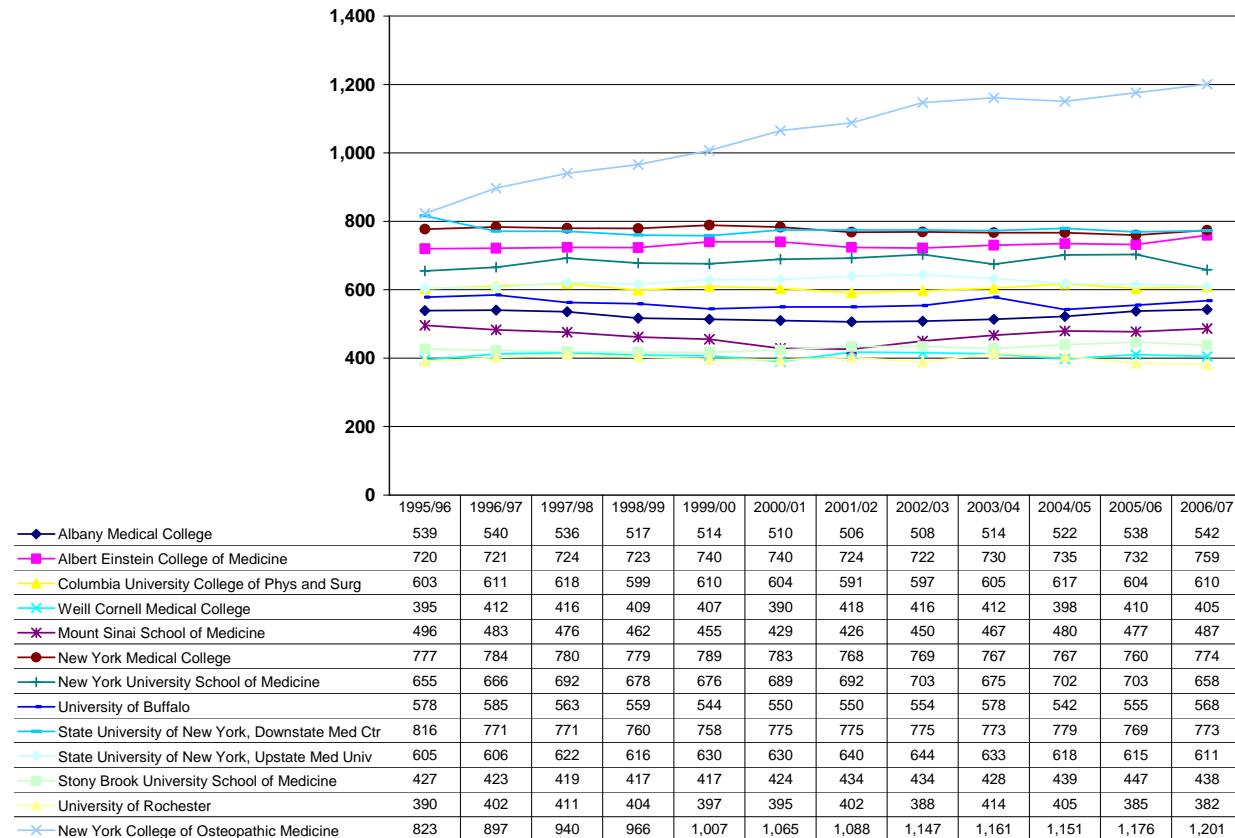
Medical School	Est.	Dean	Location	Tuition (resident/ non-resid; in 000s)	Enrollment	Affiliation
Albany Medical College	1839	Vincent Verdile, M.D.	Albany	\$41 / \$41	542	Private
Albert Einstein College of Medicine of Yeshiva University	1955	Allen M. Spiegel, M.D.	Bronx	\$39 / \$39	759	Private
Columbia University College of Physicians and Surgeons	1767	Lee Goldman, M.D.	New York	\$40 / \$40	610	Private
Mount Sinai School of Medicine of New York University	1963	Dennis S. Charney, M.D.	New York	\$33 / \$33	487	Private
New York Medical College	1858	Ralph A. O'Connell, M.D.	Valhalla	\$39 / \$39	774	Private
New York University School of Medicine	1841	Robert Grossman, M.D.	New York	\$33 / \$33	658	Private
State University of New York Downstate Medical Center College of Medicine	1860	Ian L. Taylor M.D., Ph.D.	Brooklyn	\$19 / \$34	773	Public
State University of New York Upstate Medical University College of Medicine	1834	Steven J. Scheinman, MD	Syracuse	\$19 / \$34	611	Public
Stony Brook University School of Medicine	1962	Richard N. Fine, M.D.	Stony Brook	\$19 / \$34	438	Public
University of Buffalo, State University of New York, School of Medicine and Biomedical Sciences	1846	Michael E. Cain, M.D.	Buffalo	\$19 / \$34	568	Public
University of Rochester, School of Medicine and Dentistry	1920	David Guzick, M.D., Ph.D.	Rochester	\$36 / \$36	382	Private
Weill Cornell Medical College	1898	Antonio M. Gotto Jr., M.D.	New York	\$34 / \$34	405	Private
New York College of Osteopathic Medicine of New York Institute of Technology	1977	Thomas Scandalis, D.O.	Old Westbury	\$39 / \$39	1,201	Private
Touro College of Osteopathic Medicine -- New York	2006	Robert B. Goldberg, D.O.	New York	\$33 / \$33	---	Private

Sources: Appendix IA, Table 1. "U.S. Medical Schools with Liaison Committee on Medical Education (LCME)-Accredited Programs, 2006-2007." *Journal of the American Medical Association* 294(9): 1119-1123; Singer, Allen. *American Association of Colleges of Osteopathic Medicine Fact sheet 2006*. Touro College of Osteopathic Medicine -- New York was founded in 2006, enrollment data were not available.

Trends in Medical School Enrollment

The trend in enrollment between the 1995/96 academic year and the 2006/07 academic year is presented in Figure 2. Over the course of the previous 12 years, while the New York College of Osteopathic Medicine greatly increased its capacity to educate new physicians (from 823 to 1,201 students, 45.9 percent), the allopathic schools experienced an insignificant increase (six students) in their capacity.

Figure 2 – Historical Enrollment in New York Medical Schools, 1995/96 – 2006/07



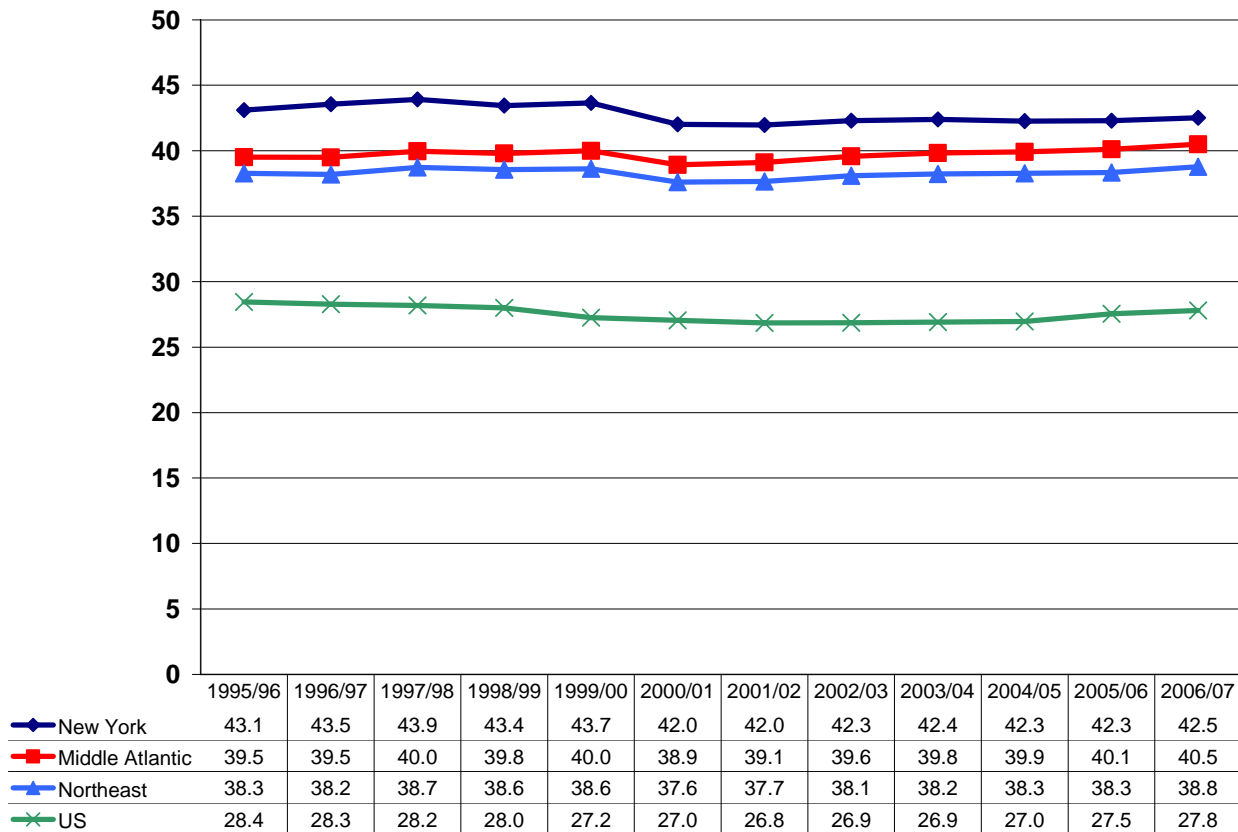
Sources: Appendix IA, Table 2. *Journal of the American Medical Association Medical Education Theme Issues, 1997-2007. 1997-2006 Annual Reports on Osteopathic Medical Education.* Chevy Chase, MD: American Association of Colleges of Osteopathic Medicine.

Albert Einstein College of Medicine experienced an increase 720 students in 1995/96 to 759 in 2006/07, a 5.4 percent increase; whereas State University of New York Downstate Medical Center College of Medicine decreased from 816 students in 1995/96 to 773 in 2006/07, a decrease of 5.3 percent. New York as a whole experienced a 4.9 percent (384 students) increase in medical school enrollment.

To put these trends into perspective, it was helpful to compare how the state fared over the same period relative to its neighbors, region of the country, and finally, the nation as a whole (Figure 3). Taking into account the changes in population across all of the states, New York experienced a decrease in medical school enrollment compared to its immediate neighbors in the Middle Atlantic division (New York and Pennsylvania) over the past decade, moving from 43.1 enrolled medical students per 100,000 population to 42.5 (a 1.4 percent decrease) compared to a 2.5 percent increase from 39.5 to 40.5 in the Middle Atlantic division. A similar

comparison can be made between New York and the entire Northeast region (including Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont, in addition to the other states mentioned above), which experienced a 1.3 percent increase over the same time period. While as a whole, the U.S. experienced a decline of 2.3 percent.

Figure 3 – Historical Medical School Enrollment per 100,000 Population in New York, the Middle Atlantic Region, the Northeast, and the U.S., 1995/96 – 2006/07

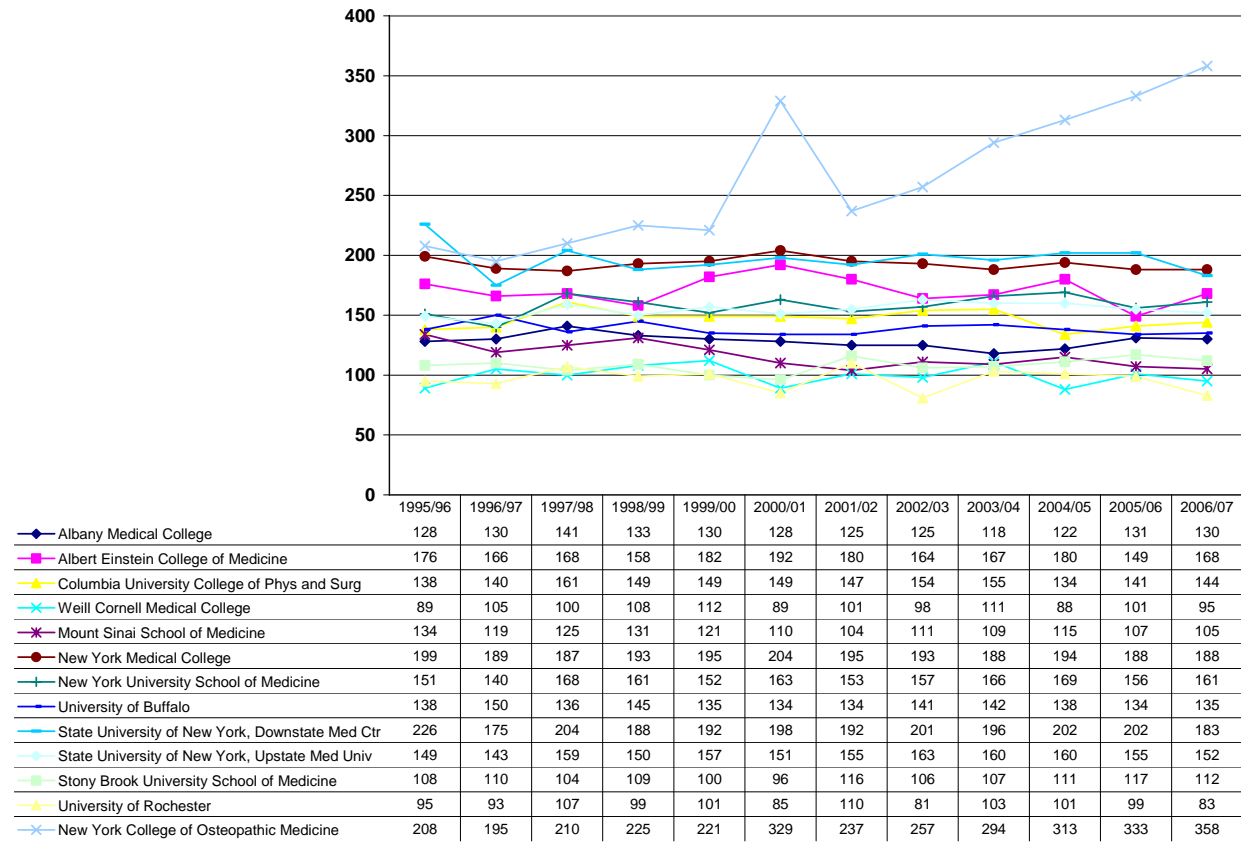


Sources: Appendix IA, Table 2, *Journal of the American Medical Association Medical Education Theme Issues, 1997-2007*. 1997-2006 Annual Reports on Osteopathic Medical Education. Chevy Chase, MD: American Association of Colleges of Osteopathic Medicine.

Trends in Medical School Graduation

The trend in graduations between the 1995/96 academic year and the 2006/07 academic year is presented in Figure 4. In the past 12 years, New York allopathic medical schools experienced a decreased of 75 graduates, (a 4.3 percent decrease). On the other hand, the New York College of Osteopathic Medicine experienced a significant increase in the number of students graduating from the school (72 percent between 1995/96 and 2006/07). On the whole, in the past 12 years, medical schools in New York experienced an increase of 3.9 percent in graduates, amounting to 75 additional annual medical school graduates in 2006/07 compared to 1995/96.

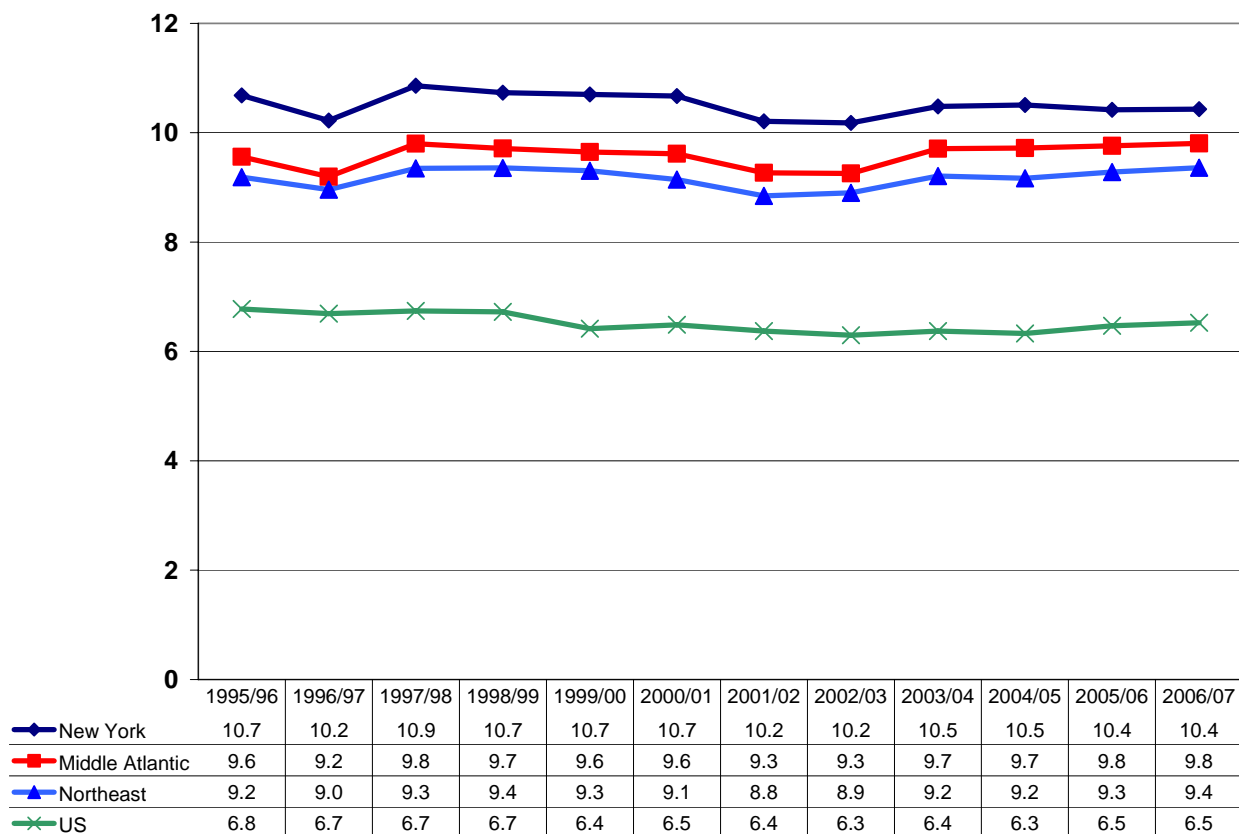
Figure 4 – Historical Graduations from New York Medical Schools, 1995/96 – 2006/07



Sources: Appendix IA, Table 2. Journal of the American Medical Association Medical Education Theme Issues, 1997-2005. 1997-2004 Annual Reports on Osteopathic Medical Education. Chevy Chase, MD: American Association of Colleges of Osteopathic Medicine.

Again some comparisons were instructive (Figure 5). Taking into account the changes in population across all of the states, New York experienced a decline in medical school graduations compared to increases by its immediate neighbors in the Middle Atlantic division over the past decade, moving from 10.7 medical graduates per 100,000 population to 10.4 (a 2.3 percent decline) compared to a 2.6 percent increase from 9.6 to 9.8 in the Middle Atlantic division. A similar comparison can be made between New York and the entire Northeast region which experienced a 1.9 percent increase over the same time period. As a whole, the U.S. experienced a decline of 3.7 percent, a slightly greater decline than New York experienced during the same period.

Figure 5 – Historical Medical School Graduations per 100,000 Population in New York, the Middle Atlantic Region, the Northeast, and the U.S., 1995/96 – 2006/07

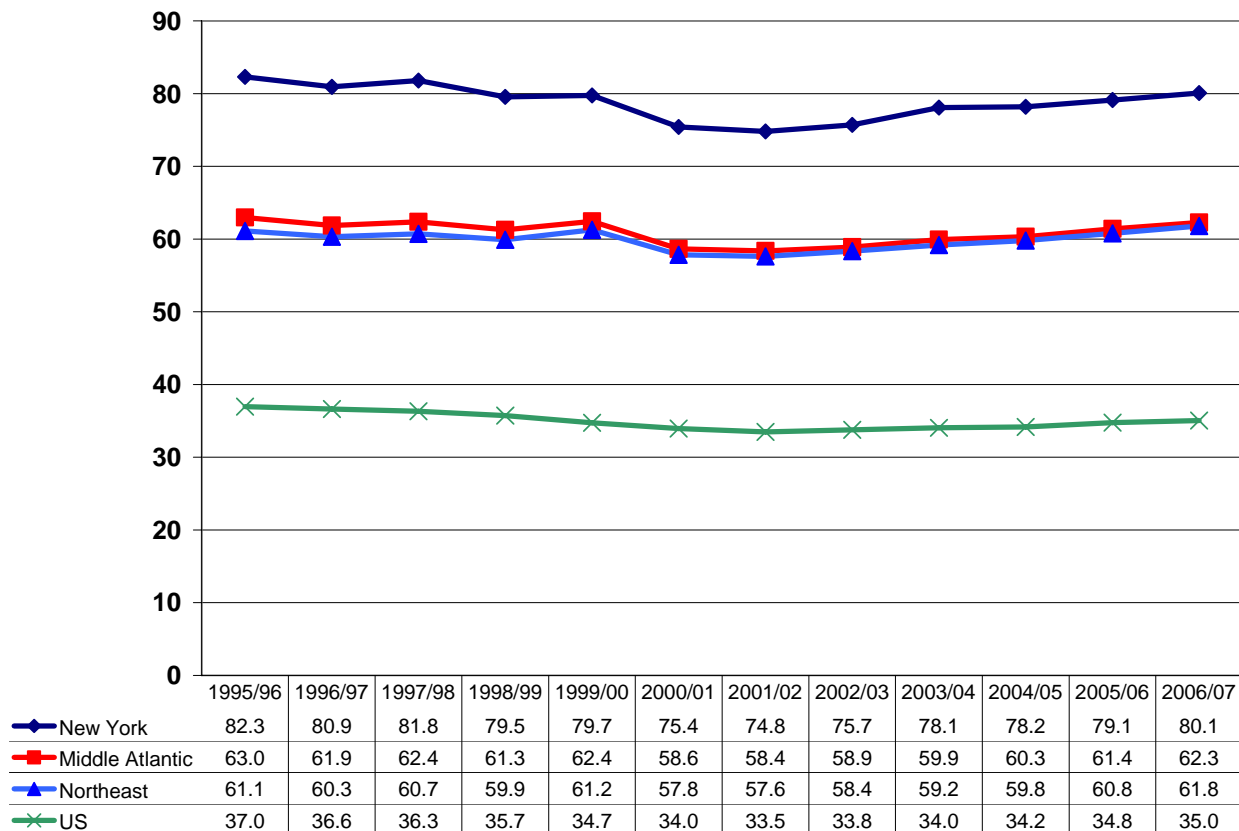


Sources: Appendix IA, Table 2. *Journal of the American Medical Association Medical Education Theme Issues, 1997-2007*. *1997-2006 Annual Reports on Osteopathic Medical Education*. Chevy Chase, MD: American Association of Colleges of Osteopathic Medicine; U.S. Census Bureau.

Graduate Medical Training

The other distinct source of physicians in the state is the product of graduate medical training efforts there. In the 2006/07 academic year, there were 15,458 physicians in the 1,103 Accreditation Council for Graduate Medical Education (ACGME)-accredited allopathic residency and fellowship programs throughout New York. That number represents a 3.5 percent increase over the 12-year period. When compared to its neighboring states and the larger Northeast region, New York did not fare well over the period. Taking population growth into account, between the 1995/96 academic year and the 2006/07 academic year, in New York the number of residents and fellows in training decreased by 2.7 percent (from 82.3 per 100,000 population to 80.1) compared to 1.1 percent decline in the Middle Atlantic division, 1.1 percent increase across the Northeast, and a 5.2 percent decline nationally (Figure 6).

Figure 6 – Historical Number of Residents and Fellows in Training per 100,000 Population in New York, the Middle Atlantic Region, the Northeast, and the U.S., 1995/96 – 2006/07



Sources: Appendix II, Table 2, *Journal of the American Medical Association Medical Education Theme Issues, 1997-2007*.

While the total number of residents in training showed a modest 3.5 percent increase over the past 12 years, the composition of the residents in training showed greater changes, and in some cases, changed dramatically (Table 2). In terms of the specialties in which residents and fellows were training, there was essentially no change in the total residents/fellows training in primary care specialties in 2006/07 than in 1995/96. Nationally, the numbers of primary care residents/fellows increased by 3.7 percent over the time period. Within the specialties comprising primary care, New York experienced a 5.3 percent increase in family medicine residents offset by a 8.9 percent decrease in obstetrics and gynecology residents. Hospital-based specialties experienced the largest growth, with the number of emergency medicine residents increasing by 96.4 percent over the 12-year period. This trend was consistent with the trend at the national level, although the increases experienced in New York were far greater than those nationally. While most surgical residencies in the state decreased or stayed the same, colon and rectal surgery and surgical subspecialties experienced increases in the number of residents/fellows in training, with colon and rectal surgery increasing by 200.0 percent and surgical subspecialties increasing by 92.3 percent. The same upward trend was evident nationally, except the increase was less dramatic: 34.0 percent and 39.1 percent, respectively. The number of residents in pediatric subspecialties showed significant increases in the state and nationally (48.9 percent and 74.7 percent, respectively). Internal medicine subspecialties also experienced an increase in residents in the state and nationally (12.7 percent and 20.3 percent, respectively). Finally, in New York the number of residents/fellows training in dermatology increased by 19.2 percent while nationally, the number increased by 25.8 percent 1995/96 and 2006/07.

Table 2 – Number of Residents/Fellows by Specialty in Graduate Medical Training in New York, 1995/96 and 2006/07

	1995/96 Residents/ Fellows	2006/07 Residents/ Fellows	Change		National Change
			Number	Percent	
Primary Care Specialties					
Family Medicine	551	580	29	5.3%	2.1%
Internal Medicine	4,240	4,371	131	3.1%	4.9%
Obstetrics and Gynecology	710	647	-63	-8.9%	-5.4%
Pediatrics	1,347	1,351	4	0.3%	8.3%
Hospital-based Specialties					
Anesthesiology	687	650	-37	-5.4%	6.2%
Emergency Medicine	363	713	350	96.4%	55.7%
Pathology - Anatomic and Clinical	372	272	-100	-26.9%	-17.1%
Radiology - Diagnostic	552	554	2	0.4%	6.8%
Surgical Specialties and Subspecialties					
General Surgery	1,214	1,090	-124	-10.2%	-6.9%
Colon and Rectal Surgery	2	6	4	200.0%	34.0%
Neurological Surgery	95	88	-7	-7.4%	4.1%
Ophthalmology	254	178	-76	-29.9%	-23.5%
Orthopedic Surgery	380	406	26	6.8%	11.0%
Otolaryngology	141	140	-1	-0.7%	6.7%
Plastic Surgery	55	47	-8	-14.5%	32.1%
Thoracic Surgery	36	36	0	0.0%	-18.5%
Urology	147	137	-10	-6.8%	-9.3%
Surgical Subspecialties	52	100	48	92.3%	39.1%
Internal Medicine Subspecialties	1,307	1,473	166	12.7%	20.3%
Pediatric Subspecialties	219	326	107	48.9%	74.7%
Combined Specialties	158	167	9	5.7%	37.3%
Other Specialties and Subspecialties					
Allergy and Immunology	34	28	-6	-17.6%	7.9%
Dermatology	99	118	19	19.2%	25.8%
Neurology	237	243	6	2.5%	4.1%
Physical Medicine and Rehabilitation	241	235	-6	-2.5%	3.4%
Preventive Medicine	32	32	0	0.0%	-34.3%
Psychiatry	923	855	-68	-7.4%	-6.2%
Transitional Year	89	83	-6	-6.7%	-17.4%
All Others	400	532	132	33.0%	40.5%
Total	14,937	15,458	521	3.5%	7.0%

Sources: State-level Data for Accredited Graduate Medical Education Programs in the U.S., 1995/96 and 2006/07. American Medical Association.

Table 3 – Origins of Physicians Training in New York Allopathic Graduate Medical Training Programs, 1995/96 and 2006/07

	1995/96					2006/07				
	In-state*	Out of state*	International	Canada	Osteopathic	In-state*	Out of state*	International	Canada	Osteopathic
Primary Care Specialties										
Family Medicine	20.5%	17.2%	50.9%	0.5%	10.8%	13.4%	11.9%	66.6%	0.3%	7.8%
Internal Medicine	20.9%	9.1%	67.4%	0.2%	2.3%	18.0%	13.5%	64.5%	0.1%	4.0%
Obstetrics and Gynecology	46.5%	33.1%	13.8%	0.4%	6.1%	24.3%	23.6%	45.4%	0.3%	6.3%
Pediatrics	23.1%	10.6%	64.1%	0.2%	1.9%	25.5%	16.0%	51.8%	0.4%	6.4%
Hospital-based Specialties										
Anesthesiology	24.6%	19.8%	51.1%	0.6%	3.9%	33.8%	33.8%	21.1%	0.3%	10.9%
Emergency Medicine	38.7%	42.5%	13.5%	0.6%	4.7%	32.4%	52.6%	7.0%	0.7%	7.3%
Pathology - Anatomic and Clinical	16.5%	14.0%	67.9%	0.5%	1.1%	16.9%	23.5%	54.0%	0.4%	5.1%
Radiology - Diagnostic	57.9%	28.8%	11.7%	0.5%	1.1%	48.9%	39.4%	8.8%	0.0%	2.9%
Surgical Specialties and Subspecialties										
General Surgery	36.0%	34.0%	28.7%	0.2%	1.0%	27.7%	32.0%	38.4%	0.3%	1.6%
Colon and Rectal Surgery	50.0%	50.0%	0.0%	0.0%	0.0%	83.3%	16.7%	0.0%	0.0%	0.0%
Neurological Surgery	48.4%	45.3%	6.3%	0.0%	0.0%	47.7%	40.9%	11.4%	0.0%	0.0%
Ophthalmology	54.3%	37.8%	7.1%	0.4%	0.4%	41.6%	44.9%	11.2%	1.1%	1.1%
Orthopedic Surgery	52.4%	44.5%	2.6%	0.0%	0.5%	39.7%	55.9%	3.4%	0.2%	0.7%
Otolaryngology	53.2%	37.6%	7.8%	0.7%	0.7%	48.6%	47.9%	2.9%	0.0%	0.7%
Plastic Surgery	43.6%	45.5%	10.9%	0.0%	0.0%	34.0%	57.4%	8.5%	0.0%	0.0%
Thoracic Surgery	52.8%	38.9%	8.3%	0.0%	0.0%	33.3%	36.1%	30.6%	0.0%	0.0%
Urology	57.8%	34.0%	8.2%	0.0%	0.0%	41.6%	50.4%	6.6%	0.0%	1.5%
Surgical Subspecialties	30.8%	51.9%	13.5%	1.9%	1.9%	21.0%	50.0%	22.0%	3.0%	4.0%
Internal Medicine Subspecialties	22.5%	12.4%	63.0%	0.2%	1.9%	24.4%	21.9%	47.9%	0.3%	5.6%
Pediatric Subspecialties	18.5%	12.0%	66.7%	0.0%	2.8%	23.3%	26.7%	43.6%	0.6%	5.8%
Combined Specialties	40.5%	24.1%	30.4%	0.0%	5.1%	35.3%	41.3%	18.6%	0.6%	4.2%
Other Specialties and Subspecialties										
Allergy and Immunology	24.2%	12.1%	54.5%	0.0%	9.1%	28.6%	32.1%	32.1%	3.6%	3.6%
Dermatology	48.5%	48.5%	3.0%	0.0%	0.0%	36.4%	59.3%	2.5%	0.8%	0.8%
Neurology	24.0%	15.7%	55.9%	0.4%	3.9%	30.9%	20.6%	42.0%	0.8%	5.8%
Physical Medicine and Rehabilitation	31.1%	16.6%	44.0%	0.4%	7.9%	15.7%	18.3%	39.6%	0.4%	26.0%
Preventive Medicine	37.5%	18.8%	34.4%	0.0%	9.4%	40.6%	53.1%	3.1%	0.0%	3.1%
Psychiatry	18.1%	12.0%	67.6%	0.7%	1.6%	24.3%	21.9%	47.0%	0.9%	5.8%
Transitional Year	22.5%	19.1%	53.9%	0.0%	4.5%	50.6%	43.4%	3.6%	1.2%	1.2%
All Others	23.4%	27.7%	45.1%	1.3%	2.5%	22.6%	28.6%	42.5%	1.1%	5.3%
Total	28.5%	19.2%	49.3%	0.4%	2.7%	25.4%	25.0%	44.1%	0.4%	5.1%

* In-state and Out-of-state refer to allopathic schools only.

Sources: State-level Data for Accredited Graduate Medical Education Programs in the U.S., 1995/96 and 2006/07. American Medical Association.

The pool from which fellows and residents are drawn is an important piece of information in evaluating graduate medical training. In New York, almost three-quarters (74.6 percent) of those in allopathic graduate training programs received their undergraduate medical education outside the state (Table 3). In 2006/07, the greatest reliance on physicians from medical schools outside the state was found in the primary care specialties, with four-fifths (80.4 percent) of the residents and fellows in those programs having attended a medical school outside New York. The primary care specialties were also the most reliant on international medical graduates, with 60.4 percent of residents and fellows in primary care specialties having attended a medical school outside the U.S. and Canada. The hospital-based specialties consistently had the greatest concentration of residents and fellows from New York medical schools.

Over time, the reliance on physicians who graduated from medical schools outside New York has increased, moving from 71.5 percent to 74.6 percent between 1995/96 and 2006/07. The specialties groups with the greatest change in their reliance on physicians from medical schools outside the state were the primary care specialties and pediatric subspecialties. In both of these groups, the most significant component of this observed change was the increase in reliance on international medical graduates.

Demographics of Graduate Medical Training in New York

Demographically, the composition of physicians training at the graduate level in New York has changed in ways similar to those training in other states. In 2006/07, women made up 44.5 percent of the physicians in graduate medical training in New York (Table 4) compared to 43.6 percent of the physicians in graduate medical training in the U.S. as a whole. Over time, the percentage of females among physicians in graduate medical training has increased. In 1995/96, women made up 33.6 percent of the physicians in graduate medical training in New York and 34.0 percent in the country as a whole.

Among physicians training at the graduate level in New York, women made up a larger proportion of those training in the primary care specialties than men. This was the case in each of the primary care specialties with the exception of general internal medicine. The gap was greatest in obstetrics/gynecology and pediatrics, where 74.5 percent of the trainees are women. On the other hand, men far outnumbered women in the surgical specialties and subspecialties. Over time, there have been some changes in the gender composition across surgical specialties among physicians training at the graduate level in New York. In general surgery and thoracic surgery the percent of female trainees increased from 16.1 percent to 29.3 percent and 2.8 percent to 27.8 percent, respectively. While female trainees in neurological surgery decreased from 14.7 percent to 8.0 percent.

In terms of race and ethnicity, non-Hispanic White physicians made up two-fifths (40.6 percent) of physicians in training programs in New York in 2006/07 (Table 5). Non-Hispanic White physicians were most represented in surgical specialties and subspecialties as well as in hospital-based specialties. Asian American physicians made up 33.2 percent of the physicians training at the graduate level. Asian American physicians were most represented in primary care specialties and internal medicine subspecialties. Underrepresented minority physicians (Blacks/African Americans and Hispanics/Latinos) made up 12.9 percent of the physicians training at the graduate level in the state. This underrepresentation compared to about 31.2 percent (in 2006) of the general population of the state comprised of Blacks/African Americans and Hispanics/Latinos. Underrepresented minorities had the highest level of representation in colon and rectal surgery (42.9 percent), family medicine (19.4 percent), obstetrics and gynecology (16.7 percent), and psychiatry (16.7 percent).

Between the 1995/96 and 2006/07 academic years, the most noticeable trend in racial/ethnic make-up of the physicians training at the graduate level in New York was an increase in the representation of Asian American trainees and subsequent decrease in the representation of non Hispanic White trainees. This closely follows the trend at the national level over the same time period.

Table 4 – Gender Distribution of Physicians Training in New York Allopathic Graduate Medical Training Programs, 1995/96 and 2006/07

	1995/96		2006/07	
	Male	Female	Male	Female
Primary Care Specialties				
Family Medicine	60.3%	39.7%	46.7%	53.3%
Internal Medicine	69.7%	30.3%	56.1%	43.9%
Obstetrics and Gynecology	44.1%	55.9%	25.5%	74.5%
Pediatrics	43.8%	56.2%	30.4%	69.6%
Hospital-based Specialties				
Anesthesiology	72.8%	27.2%	65.1%	34.9%
Emergency Medicine	68.0%	32.0%	58.9%	41.1%
Pathology - Anatomic and Clinical	59.4%	40.6%	46.3%	53.7%
Radiology - Diagnostic	67.9%	32.1%	69.5%	30.5%
Surgical Specialties and Subspecialties				
General Surgery	83.9%	16.1%	70.7%	29.3%
Colon and Rectal Surgery	50.0%	50.0%	50.0%	50.0%
Neurological Surgery	85.3%	14.7%	92.0%	8.0%
Ophthalmology	70.1%	29.9%	56.7%	43.3%
Orthopedic Surgery	92.9%	7.1%	87.4%	12.6%
Otolaryngology	79.4%	20.6%	69.3%	30.7%
Plastic Surgery	85.5%	14.5%	83.0%	17.0%
Thoracic Surgery	97.2%	2.8%	72.2%	27.8%
Urology	95.9%	4.1%	77.4%	22.6%
Surgical Subspecialties	94.2%	5.8%	90.0%	10.0%
Internal Medicine Subspecialties	74.2%	25.8%	65.4%	34.6%
Pediatric Subspecialties	50.7%	49.3%	33.1%	66.9%
Combined Specialties	60.1%	39.9%	53.9%	46.1%
Other Specialties and Subspecialties				
Allergy and Immunology	47.1%	52.9%	28.6%	71.4%
Dermatology	38.4%	61.6%	32.2%	67.8%
Neurology	67.5%	32.5%	56.0%	44.0%
Physical Medicine and Rehabilitation	62.2%	37.8%	61.7%	38.3%
Preventive Medicine	34.4%	65.6%	37.5%	62.5%
Psychiatry	56.4%	43.6%	45.6%	54.4%
Transitional Year	67.4%	32.6%	60.2%	39.8%
All Others	59.8%	40.3%	59.0%	41.0%
Total	66.4%	33.6%	55.5%	44.5%

Sources: State-level Data for Accredited Graduate Medical Education Programs in the U.S., 1995/96 and 2006/07. American Medical Association.

Table 5 – Race/Ethnicity Distribution of Physicians Training in New York Allopathic Graduate Medical Training Programs, 1995/96 and 2006/07

	1995/96					2006/07				
	White, non-Hispanic	Black/African American	Asian American	Hispanic/Latino	Other	White, non-Hispanic	Black/African American	Asian American	Hispanic/Latino	Other
Primary Care Specialties										
Family Medicine	47.0%	8.3%	22.0%	7.1%	15.6%	35.5%	11.1%	37.0%	8.4%	8.1%
Internal Medicine	36.5%	6.6%	46.5%	4.9%	5.6%	27.5%	6.3%	43.8%	7.7%	14.7%
Obstetrics and Gynecology	60.4%	13.9%	16.5%	4.5%	4.6%	48.5%	11.4%	23.3%	5.3%	11.6%
Pediatrics	37.3%	7.1%	38.8%	7.1%	9.6%	38.0%	8.3%	31.4%	8.0%	14.3%
Hospital-based Specialties										
Anesthesiology	49.5%	9.0%	32.5%	4.5%	4.5%	46.5%	5.2%	30.3%	6.2%	11.8%
Emergency Medicine	64.2%	10.5%	11.6%	8.8%	5.0%	46.7%	6.4%	24.1%	6.7%	16.1%
Pathology - Anatomic and Clinical	43.5%	3.2%	39.0%	5.6%	8.6%	44.3%	4.9%	36.2%	5.2%	9.4%
Radiology - Diagnostic	60.5%	4.7%	20.3%	2.9%	11.6%	52.3%	3.0%	29.9%	3.7%	11.1%
Surgical Specialties and Subspecialties										
General Surgery	55.4%	6.5%	23.2%	5.7%	9.1%	41.3%	8.7%	24.9%	6.2%	18.9%
Colon and Rectal Surgery	50.0%	0.0%	50.0%	0.0%	0.0%	57.1%	28.6%	0.0%	14.3%	0.0%
Neurological Surgery	63.2%	5.3%	15.8%	1.1%	14.7%	68.9%	5.6%	10.0%	2.2%	13.3%
Ophthalmology	63.0%	7.1%	20.1%	4.7%	5.1%	53.3%	6.0%	29.3%	3.3%	8.2%
Orthopedic Surgery	80.5%	3.2%	9.5%	2.9%	3.9%	58.4%	4.3%	16.1%	4.0%	17.3%
Otolaryngology	66.7%	5.7%	17.0%	3.5%	7.1%	53.1%	2.7%	27.2%	4.8%	12.2%
Plastic Surgery	72.7%	5.5%	10.9%	9.1%	1.8%	57.1%	0.0%	24.5%	4.1%	14.3%
Thoracic Surgery	69.4%	5.6%	19.4%	0.0%	5.6%	52.6%	7.9%	26.3%	5.3%	7.9%
Urology	76.9%	4.1%	15.0%	2.0%	2.0%	55.8%	2.7%	20.4%	6.8%	14.3%
Surgical Subspecialties	73.1%	5.8%	11.5%	1.9%	7.7%	44.9%	2.8%	27.1%	6.5%	18.7%
Internal Medicine Subspecialties										
	44.2%	6.1%	36.6%	6.1%	7.0%	46.1%	4.6%	38.9%	4.2%	6.3%
Pediatric Subspecialties										
	47.5%	4.6%	31.5%	8.2%	8.2%	55.9%	4.5%	26.7%	8.4%	4.5%
Combined Specialties										
	46.8%	8.2%	22.8%	8.2%	13.9%	43.3%	3.4%	17.4%	6.2%	29.8%
Other Specialties and Subspecialties										
Allergy and Immunology	47.1%	5.9%	38.2%	2.9%	5.9%	53.6%	0.0%	42.9%	0.0%	3.6%
Dermatology	76.8%	5.1%	11.1%	0.0%	7.1%	65.0%	3.3%	16.7%	1.7%	13.3%
Neurology	52.7%	3.4%	33.3%	5.9%	4.6%	53.8%	2.4%	29.2%	4.0%	10.7%
Physical Medicine and Rehabilitation	51.0%	8.7%	30.3%	7.1%	2.9%	38.0%	3.6%	33.2%	6.0%	19.2%
Preventive Medicine	65.6%	18.8%	6.3%	6.3%	3.1%	54.5%	6.1%	24.2%	3.0%	12.1%
Psychiatry	49.7%	5.7%	29.8%	10.7%	4.0%	43.3%	6.4%	21.9%	10.3%	18.0%
Transitional Year	44.9%	6.7%	40.4%	6.7%	1.1%	56.0%	3.6%	33.3%	1.2%	6.0%
All Others	54.0%	6.3%	24.3%	8.3%	7.3%	47.3%	4.4%	35.0%	6.8%	6.5%
Total	47.9%	6.8%	32.6%	5.8%	6.9%	40.6%	6.3%	33.2%	6.6%	13.3%

Sources: State-level Data for Accredited Graduate Medical Education Programs in the U.S., 1995/96 and 2006/07. American Medical Association.

Production of New Physicians in New York

In the 2006/07 academic year, 4,708 physicians training at the graduate level in New York completed a training program (Table 6).²⁹ This represented an increase of 386 physicians (8.9 percent) compared to the 1995/96 academic year. This increase was larger than the increase at the national level of 6.3 percent. The greatest numbers of physicians completed training in general internal medicine (1,302), internal medicine subspecialties (614), and pediatrics (437). For specialty groups, pediatric subspecialties (46.9 percent) and hospital-based specialties (26.1 percent) experienced the greatest growth in production. In terms of growth or decline in particular specialties, the greatest growth was observed in the number physicians completing training in preventive medicine (750.0 percent), colon and rectal surgery (150.0 percent), and emergency medicine (129.6 percent). These rates of change were far greater or a reversal of the change observed at the national level in these specialties.

On the other hand, the production of new surgical specialties and subspecialties physicians declined slightly over the time period. Moreover, the number of physicians completing in three specialties had moderated declines over the time period - plastic surgery (24.1 percent), psychiatry (23.8 percent), and otolaryngology (23.1 percent). The observed declines in these three specialties were more than twice the changes at the national level.³⁰

²⁹ This number does not include physicians who completed a preliminary year in a program.

³⁰ Individual specialty-level change was difficult to compare because the annual number of program completers was very small in many specialties.

Table 6 – Number of Physicians Completing Allopathic Graduate Medical Training in New York by Specialty, 1995/96 and 2006/07

	1995/96 Residents/ Fellows Completing Training	2006/07 Residents/ Fellows Completing Training	Change		National Change
			Number	Percent	
Primary Care Specialties					
Family Medicine	122	180	58	47.5%	23.8%
Internal Medicine	1,147	1,302	155	13.5%	6.7%
Obstetrics and Gynecology	171	161	-10	-5.8%	-8.0%
Pediatrics	394	437	43	10.9%	8.4%
Hospital-based Specialties					
Anesthesiology	258	205	-53	-20.5%	-19.0%
Emergency Medicine	81	186	105	129.6%	69.6%
Pathology - Anatomic and Clinical	77	83	6	7.8%	6.4%
Radiology - Diagnostic	160	132	-28	-17.5%	-7.9%
Surgical Specialties and Subspecialties					
General Surgery	172	165	-7	-4.1%	-0.5%
Colon and Rectal Surgery	2	5	3	150.0%	-23.7%
Neurological Surgery	16	16	0	0.0%	2.8%
Ophthalmology	77	67	-10	-13.0%	-24.0%
Orthopedic Surgery	89	76	-13	-14.6%	-3.9%
Otolaryngology	39	30	-9	-23.1%	-11.1%
Plastic Surgery	29	22	-7	-24.1%	-11.7%
Thoracic Surgery	18	16	-2	-11.1%	-9.0%
Urology	35	34	-1	-2.9%	-11.5%
Surgical Subspecialties	43	83	40	93.0%	37.1%
Internal Medicine Subspecialties	551	614	63	11.4%	15.7%
Pediatric Subspecialties	64	94	30	46.9%	68.6%
Combined Specialties	16	35	19	118.8%	133.5%
Other Specialties and Subspecialties					
Allergy and Immunology	18	16	-2	-11.1%	-14.2%
Dermatology	41	38	-3	-7.3%	11.4%
Neurology	69	72	3	4.3%	-5.1%
Physical Medicine and Rehabilitation	84	84	0	0.0%	2.5%
Preventive Medicine	2	17	15	750.0%	183.6%
Psychiatry	256	195	-61	-23.8%	-10.9%
Transitional Year	85	0	-85	-100.0%	-100.0%
All Others	206	343	137	66.5%	60.6%
Total	4,322	4,708	386	8.9%	6.3%

Sources: State-level Data for Accredited Graduate Medical Education Programs in the U.S., 1995/96 and 2006/07. American Medical Association.

Post Training Plans of Physicians Completing Graduate Medical Training in New York

Over half (52.7 percent) of the physicians who completed graduate medical training in New York in 2007 planned to enter practice after their training was completed (Table 7). Physicians completing training in pediatric subspecialties and internal medicine subspecialties were the most likely (66.7 and 66.3 percent, respectively) to have plans to enter practice after their training was completed. They were followed by physicians completing training in hospital-based specialties (58.3 percent). The physicians least likely to have plans to enter practice after training were those completing training in surgical and specialties and subspecialties; only 28.2 percent of the physicians had plans to enter practice upon completion of their training. In terms of specific specialties, physicians in dermatology, emergency medicine, and family medicine were the most likely (87.0, 83.2, and 78.9 percent, respectively) to have plans to enter practice upon completion of their training.

Over one-third (36.7 percent) of the physicians who completed graduate medical training in 2007 planned to pursue additional training upon the completion of their training. Those completing surgical specialty and subspecialty training were the most likely to have such plans (68.9 percent). The least likely were those physicians completing pediatric subspecialty training and internal medicine subspecialty, with 13.3 percent and 21.1 percent, respectively, having plans to pursue additional training upon the completion of their training. In terms of specific specialties, physicians completing training in ophthalmology, general surgery, and orthopedic surgery were the most likely (87.5, 85.3, and 72.9 percent, respectively) to have plans to seek additional training upon completion of their current training.

Academia was the last significant defined post-completion activity with 2.5 percent of the physicians completing training in New York in 2007 planning to enter academia upon completion of their current training. Those completing pediatric subspecialty training were the most likely (8.3 percent) to have plans to enter academia after their training was completed. In terms of specific specialties, physicians completing training in allergy and immunology (8.3 percent) were the most likely to have plans to enter academia upon completion of their training.

Table 7 – Post Training Plans of Physicians Completing Graduate Medical Training in New York, 2007

	Enter Practice	Additional Training	Academia	Other
Primary Care Specialties				
Family Medicine	78.9%	10.6%	0.8%	9.7%
Internal Medicine	42.3%	42.0%	2.8%	12.9%
Obstetrics and Gynecology	72.4%	21.8%	0.0%	5.7%
Pediatrics	51.4%	38.3%	0.5%	9.8%
Hospital-based Specialties				
Anesthesiology	75.8%	19.5%		4.7%
Emergency Medicine	83.2%	12.1%	1.9%	2.8%
Pathology - Anatomic and Clinical	28.8%	56.1%	1.5%	13.7%
Radiology - Diagnostic	34.1%	59.3%	4.1%	2.4%
Surgical Specialties and Subspecialties				
General Surgery	8.8%	85.3%	0.0%	5.9%
Neurological Surgery	62.5%	37.5%	0.0%	0.0%
Ophthalmology	12.5%	87.5%	0.0%	0.0%
Orthopedic Surgery	24.7%	72.9%	1.2%	1.2%
Otolaryngology	40.0%	60.0%	0.0%	0.0%
Plastic Surgery	55.6%	33.3%	0.0%	11.1%
Thoracic Surgery	50.0%	50.0%	0.0%	0.0%
Urology	33.3%	61.1%	0.0%	5.6%
Surgical Subspecialties	83.3%	16.7%	0.0%	0.0%
Internal Medicine Subspecialties				
	66.3%	21.1%	5.6%	7.0%
Pediatric Subspecialties				
	66.7%	13.3%	8.3%	11.7%
Other Specialties and Subspecialties				
Allergy and Immunology	75.0%	8.3%	8.3%	8.3%
Dermatology	87.0%	4.3%	0.0%	8.6%
Neurology	28.0%	60.0%	6.0%	6.0%
Physical Medicine and Rehabilitation	52.9%	35.3%	0.0%	11.8%
Preventive Medicine	0.0%	33.3%	0.0%	66.7%
Psychiatry	52.9%	40.1%	1.7%	5.3%
All Others	66.7%	20.0%	4.4%	8.8%
Total	52.7%	36.7%	2.5%	8.0%

Source: 2006 Survey of Residents and Fellows Completing Training in New York. Center for Health Workforce Studies.

For the physicians who reported to have plans to enter practice after they completed training, less than half (47.7 percent) had plans to remain in the state (Table 8). Only other specialties and subspecialties physicians and hospital-based specialties were more likely (62.6 and 52.1 percent, respectively) to have plans to practice in New York than to leave. Specifically, physicians completing training in otolaryngology and psychiatry (83.4 and 71.3 percent, respectively) were more likely to have plans to remain in the state to practice than to leave

upon completing their training. Physicians completing training in orthopedic surgery, general surgery, and surgical specialties were the least likely (14.3, 16.7, 16.7 percent, respectively) to remain in New York to practice.

Table 8 – Location of New Practice of Physicians Completing Graduate Medical Education in New York with Confirmed Plans to Enter Practice, 2007

	New York	Other State in the U.S.	Outside U.S.
Primary Care Specialties			
Family Medicine	57.4%	39.1%	3.4%
Internal Medicine	31.9%	67.8%	0.4%
Obstetrics and Gynecology	60.0%	40.0%	0.0%
Pediatrics	51.2%	47.8%	1.1%
Hospital-based Specialties			
Anesthesiology	52.2%	46.7%	1.1%
Emergency Medicine	49.4%	49.4%	1.1%
Pathology - Anatomic and Clinical	47.1%	52.9%	0.0%
Radiology - Diagnostic	59.1%	38.6%	2.3%
Surgical Specialties and Subspecialties			
General Surgery	16.7%	83.3%	0.0%
Neurological Surgery	60.0%	40.0%	0.0%
Ophthalmology	40.0%	60.0%	0.0%
Orthopedic Surgery	14.3%	76.2%	9.5%
Otolaryngology	83.4%	16.7%	0.0%
Plastic Surgery	40.0%	60.0%	0.0%
Thoracic Surgery	66.7%	33.3%	0.0%
Urology	33.3%	66.7%	0.0%
Surgical Subspecialties	16.7%	77.8%	5.6%
Internal Medicine Subspecialties	45.8%	51.6%	2.7%
Pediatric Subspecialties	47.5%	50.0%	2.5%
Other Specialties and Subspecialties			
Allergy and Immunology	44.4%	55.6%	0.0%
Dermatology	50.0%	50.0%	0.0%
Neurology	68.8%	25.0%	6.3%
Physical Medicine and Rehabilitation	68.0%	32.0%	0.0%
Psychiatry	71.3%	28.7%	0.0%
All Others	43.4%	56.7%	0.0%
Total	47.7%	50.7%	1.5%

Source: 2006 Survey of Residents and Fellows Completing Training in New York. Center for Health Workforce Studies.

Chapter 6: Physician Supply and Demand Forecasting in the U.S.

Since the mid-1960s, the nation has struggled with a series of physician workforce issues: determining the appropriate number of physicians needed to adequately care for the population, the role of IMGs, the mix of primary care and non-primary care physicians, lack of diversity in medicine, maldistribution of existing physician resources, and, more recently, the evolving demographics of the profession.

Growth of the Physician Workforce in the U.S.: 1960 to the Present

Between 1960 and 1980, the number of allopathic medical schools in the U.S. grew from 85 to 126, and the number of graduates more than doubled from 7,081 to 15,113.³¹ Moreover, the nation's physician supply grew rapidly, increasing from 235,303 active allopathic physicians in 1965 to 316,491 in 1975.³² In 1976, in response to concerns about the rapidly growing supply of physicians, the Graduate Medical Education National Advisory Committee (GMENAC) was established to advise the nation on how many physicians were needed in the U.S., in total and by specialty. In 1980, GMENAC concluded that the nation faced a potentially serious surplus and recommended the nation limit the number of medical school positions and severely restrict the number of IMGs entering the U.S.³³

When GMENAC issued its report in 1980, there were 419,228 active physicians in the U.S.³⁴ The surplus GMENAC envisioned was based on an estimate that the number of physicians would grow to 535,750 by 1990 and 642,950 by 2000 unless steps were taken to reduce the growth in physicians.³⁵

Concerns about a potential surplus escalated with the publication of several papers in the early 1990s suggesting that the expansion of managed care and its emphasis on primary care would lead to an even greater surplus of physicians than predicted by GMENAC, especially medical and surgical specialists.³⁶ In fact, Weiner³⁷ estimated that under certain managed care expansion scenarios the nation required between 138 and 144 patient care physicians per 100,000 population, a level well below the 191 physicians per 100,000 population suggested

³¹ Association of American Medical Colleges. *AAMC Data Book: Statistical Information Related to Medical Schools and Teaching Hospitals*. Washington, DC: Association of American Medical Colleges; 2001. Tables A1 and B1.

³² American Medical Association. *Physician Distribution and Medical Licensure in the U.S., 1975*. Chicago, IL: American Medical Association; 1976.

³³ Graduate Medical Education National Advisory Committee. *Report of the Graduate Medical Education National Advisory Committee to the Secretary*. Washington, DC: U.S. Department of Health and Human Services; 1981.

³⁴ Salsberg ES, Forte GJ. Trends in the physician workforce, 1980-2000. *Health Affairs*. 2002;21(5):165-173.

³⁵ Graduate Medical Education National Advisory Committee. *Report of the Graduate Medical Education National Advisory Committee to the Secretary*. Washington, DC: U.S. Department of Health and Human Services; 1981.

³⁶ Weiner JP. Forecasting the effects of health reform on U.S. physician workforce requirement. Evidence from HMO staffing patterns. *Journal of the American Medical Association*. 1994;272(3):222-230; Weiner JP. *Assessing Current and Future U.S. Physician Requirements Based on HMO Staffing Rates: A Synthesis of New Sources of Data and Forecasts for the years 2000 and 2020*. Washington, DC: U.S. Department of Health and Human Services, Bureau of Health Professions. HRSA 94-576(P);1995; Gamliel S, Politzer RM, Rivo ML, Mullan F. Managed care on the march: will physicians meet the challenge? *Health Affairs*. 1995;14,(2):131-142; Wennberg JE, Goodman DC, Nease RF, Keller RB. Finding equilibrium in U.S. physician supply. *Health Affairs*. 1993;12(2):89-103.

³⁷ Weiner JP. Forecasting the effects of health reform on U.S. physician workforce requirement. evidence from HMO staffing patterns. *Journal of the American Medical Association*. 1994;272(3):222-230; Weiner JP. *Assessing Current and Future U.S. Physician Requirements Based on HMO Staffing Rates: A Synthesis of New Sources of Data and Forecasts for the years 2000 and 2020*. Washington, DC: U.S. Department of Health & Human Services, Bureau of Health Professions. HRSA 94-576(P); 1995.

by GMENAC.³⁸ Since the nation already had 214 active physicians per 100,000 in 1990 and was experiencing a period of physician supply growth, the specter of a massive surplus of physicians by the turn of the century was raised. This concern was also echoed by the federal COGME. In several reports between 1992 and 1998, COGME reaffirmed its concern with a potential surplus of physicians.³⁹

In 2000, there were approximately 779,723 active physicians in the U.S., or 276 physicians per 100,000 population. However, if the GMENAC methodology for calculating physician supply was used, including a downward adjustment for physicians in training, the supply of physicians in 2000 would have been 676,381, or 240 physicians per 100,000 population. Thus, as predicted by GMENAC, the physician supply in the U.S. grew very rapidly. Between 1980 and 2000, the physician supply in the U.S. increased by more than 320,000 physicians. By 2006, the number of active physicians in the U.S. had grown to over 865,000, or 291 physicians per 100,000 population.⁴⁰

Physician Workforce Policy: 1986 to the Present

Although the federal government does not control the education, training, and supply of physicians in the U.S., a series of publicly supported reports and studies along with the work of COGME have provided important guidance to the medical education and training community. COGME was authorized by Congress in 1986 to act as the federal physician workforce planning group.⁴¹

A central charge of COGME was to make policy recommendations with respect to the adequacy of the supply and distribution of physicians in the U.S., including current and future shortages or excesses of physicians in the medical and surgical specialties and subspecialties. Since 1992, COGME held a set of physician workforce policy goals centered on its 110/50-50 recommendations, first articulated in its *Third Report: Improving Access to Health Care Through Physician Workforce Reform: Directions for the 21st Century*.⁴²

The 110/50-50 recommendations called for reducing the number of physicians entering residency training from what was then 140 percent to 110 percent of the number of graduates from allopathic and osteopathic medical schools in the U.S. in 1993 and increasing the percentage of those graduates who complete training and enter practice as generalists from the level then at 30 percent to at least 50 percent. Several years later, COGME's

³⁸ Salsberg ES, Forte GJ. Trends in the physician workforce, 1980-2000. *Health Affairs*. 2002;21(5):165-173.

³⁹ Council on Graduate Medical Education. *Third Report: Improving Access to Health Care Through Physician Workforce Reform*. Rockville, MD: COGME/Health Resources and Services Administration; 1992; Council on Graduate Medical Education. *Fourth Report Recommendations to Improve Access to Health Care Through Physician Workforce Reform*. Rockville, MD: COGME/Health Resources and Services Administration; 1994; Council on Graduate Medical Education. *Sixth Report: Managed Health Care: Implications for the Physician Workforce and Medical Education*. Rockville, MD: COGME/Health Resources and Services Administration; 1995a; Council on Graduate Medical Education. *Seventh Report: Physician Workforce Funding Recommendations for Department of Health and Human Services Programs*. Rockville, MD: COGME/Health Resources and Services Administration; 1995b; Council on Graduate Medical Education. *Eighth Report: Patient Care Physician Supply and Requirements: Testing COGME Recommendations*. Rockville, MD: COGME/Health Resources and Services Administration; 1996; Council on Graduate Medical Education. *Eleventh Report International Medical Graduates, The Physician Workforce and GME Payment Reform*. Rockville, MD: COGME/Health Resources and Services Administration; 1998.

⁴⁰ American Medical Association. *Physician Characteristics and Distribution in the U.S. 2008 Edition*. Chicago, IL: AMA Press; 2008.

⁴¹ Grumbach K. Fighting hand to hand over physician workforce policy. *Health Affairs*. 2002a;21(5):13-27.

⁴² Council on Graduate Medical Education. *Third Report: Improving Access to Health Care Through Physician Workforce Reform*. Rockville, MD: COGME/Health Resources and Services Administration; 1992.

*Eighth Report: Patient Care Physician Supply and Requirements: Testing COGME Recommendations*⁴³ provided projections of physician supply and requirements that supported the sagacity of the recommendations laid out in the *Third Report*.

In assessing the progress made towards COGME's 110/50-50 goals, COGME's *Fourteenth Report: COGME Physician Workforce Policies: Recent Developments and Remaining Challenges in Meeting National Goals*⁴⁴, found that as of the 1997/98 academic year, the nation's first-year residents numbered approximately 129 percent of the number of graduates of allopathic and osteopathic medical schools in the U.S., and that it would be necessary to reduce the number of first year residents by about 3,400 to reach the 110 percent goal. Moreover, the *Fourteenth Report* found that while the number of generalists completing training each year had increased from earlier periods, the nation was still training too few generalists and too many specialists.

Moreover, several examinations of the balance of supply of and demand for physicians suggested that the nation may be facing a shortage rather than a surplus of physicians in the coming years.⁴⁵ The work of Cooper, especially, started with the premise of a physician marketplace where consumers purchase services from physicians – the important drivers in such a system are population growth and population wealth.

The arguments and justifications employed in the *Third Report*, however, were not based on market considerations. Instead, they were based on public health considerations including universal access to health care, cost efficiency, and the goals of cost-effective levels of physician supply and the appropriate mix of generalists to provide for the health needs of the U.S. The empirical evidence to support the recommended generalist/specialist mix (50-50) was drawn from international comparisons and from staffing patterns of closed managed care health care systems. As was revealed in *Fourteen Report* and other work, the models that informed the 110/50-50 recommendations were based on a health care delivery systems which had never been implemented as pervasively as predicted⁴⁶, had changed sufficiently to render the recommendations obsolete, or had problems of their own (i.e., international supply/need imbalances).

Ultimately, in 2002 COGME commissioned a report to take another look at physician workforce projections. In January 2005, COGME released the findings of its re-examination of the previous physician workforce projections in its *Sixteenth Report: Physician Workforce Policy Guidelines for the United States, 2000 – 2020*.⁴⁷ The report detailed forecasts of national physician supply and demand that indicated a substantial shortage of physicians by 2020. The magnitude of the shortage was estimated at 85,000 to 96,000 physicians, or between 7.5 and 8.5 percent of the likely number of physicians required to provide services for the nation's population in 2020.

⁴³ Council on Graduate Medical Education. *Eighth Report Patient Care Physician Supply and Requirements: Testing COGME Recommendations*. Rockville, MD: COGME/Health Resources and Services Administration; 1996.

⁴⁴ Council on Graduate Medical Education. *Fourteenth Report: COGME Physician Workforce Policies: Recent Developments and Remaining Challenges in Meeting National Goals*. Rockville, MD: COGME/Health Resources and Services Administration; 1999.

⁴⁵ Cooper RA. There's a shortage of specialists: is anyone listening? *Academic Medicine*. 2002;77(8):761-766; Cooper RA, Getzen TE, McKee HJ, Laud P. Economic and demographic trends signal an impending physician shortage. *Health Affairs*. 2002;21(1):140-154; Cooper RA, Getzen TE, Laud P. Economic expansion is a major determinant of physician supply and utilization. *Health Services Research*. 2003;38(2):675-696; Bland KI, Issacs G. Contemporary trends in student selection of medical specialties: the potential impact on general surgery. *Archives of Surgery*. 2002;137(9):1078-1079; Forte GJ, Salsberg ES, Wing P, Beaulieu M, Myers V. *The Allergy and Immunology Physician Workforce 2000*. Rensselaer, NY: Center for Health Workforce Studies; 2000.

⁴⁶ Grumbach K. Fighting hand to hand over physician workforce policy. *Health Affairs*. 2002a;21(5):13-27.

⁴⁷ Council on Graduate Medical Education. *Sixteenth Report: Physician Workforce Policy Guidelines for the United States, 2000-2020*. Rockville, MD: COGME/Health Resources and Services Administration; 2005.

The *Sixteenth Report* joined a growing number of voices that had arrived at the same troubling conclusion. In the late 1990s, prominent physician workforce researchers began to question the notion of a national physician surplus widely held earlier in the decade. With aging general and physician populations, a stagnant medical education and training effort, more than 4,000 designated primary care health professional shortage areas (HPSAs), a decline in the growth of managed care, a willingness of payors to continue supporting rising rates of physician utilization, and reports from a dozen medical specialties of current or impending physician shortages, it no longer made sense to think in terms of physician surpluses. COGME's report attempted to bring all of these observations together.

Most recently, the Association of American Medical College's Center for Workforce Studies developed updated forecasts of the physician shortage.⁴⁸ This work suggests that the magnitude of the shortage will be in excess of 150,000 full-time equivalent physicians by 2025. They recommend a multipronged approach to addressing the shortage, including increasing training capacity as well as reforming the health care delivery system.

One of the failings of COGME's *Sixteenth Report* was its lack of attention to regional and specialty-specific variations embedded in its forecasts. Thus, one of the ramifications of the report was movement by concerned stakeholders in a number of states to determine how the projected national physician shortage would play out in their areas. Amid renewed discussion of the adequacy of the physician workforce nationally, several pioneering states took it upon themselves to conduct assessments of the adequacy of their supplies of physicians now and with an eye to the future. Arizona, California, Florida, Kentucky, Massachusetts, Michigan, Mississippi, New Mexico, North Carolina, Oregon, Texas, Wisconsin, and others have either finished an assessment or are in the midst of one. Arizona, Florida, and Texas deemed it necessary to expand medical school capacity in their states in order to assure an adequate supply of physicians in the future. Moreover, as was stated above, in the past several years, specialty-specific examinations in cardiology, endocrinology, allergy and immunology, psychiatry, neurosurgery, pediatric subspecialties, dermatology, medical genetics, radiology, geriatric medicine, and critical care also yielded findings of current or future shortages of physicians.

Approaches to Forecasting Physician Supply and Demand

The two basic approaches to examining physician workforce requirements, the first based on market demand, the other based on public health goals (need), have long been recognized by health workforce researchers. The demand approaches examine economic indicators such as the functional relationships between the volume of medical services that populations desire to consume at given levels of cost, financial resources, population size, individual desires, and preferences as reflected in the psychological wants of populations and the quality of the job market for physicians in specific specialties in specific geographical areas. The need approaches attempt to incorporate concerns around public health and normative public policy that promotes the health of the nation in a financially responsible manner.

Not surprisingly, as the assumptions underlying the two basic approaches are different, quite often the conclusions and policy recommendations drawn from analyses based on these approaches differ, too. Proponents of both approaches have argued that employing only one of these approaches may be a necessary but insufficient basis for developing physician workforce policy. Using a market-based approach alone can produce recommendations which mirror the current health care delivery system, with all of its advantages and

⁴⁸ Dill MJ, Salsberg ES. *The Complexities of Physician Supply and Demand: Projections through 2025*. Washington, DC: Center for Workforce Studies, Association of American Medical Colleges; 2008.

disadvantages, while considering a need-based approach alone can produce unreachable policy goals and untenable policy recommendations due to disagreement with society's desires and preferences.

Factors Affecting Physicians Supply and Demand

Supply

In order to accurately forecast the supply of physicians in a geographic location, it is helpful to take into consideration the following:

- 1) The overall number of new entrants into the physician workforce and the source of the new entrants;
- 2) The gender distribution of the current physician supply and of new entrants and its effect on the relative number of hours spent in professional activities (to accurately calculate full-time equivalents or FTEs);
- 3) The age distribution of the current physician supply;
- 4) Retirement, death, and other separation rates of the current physician supply;
- 5) The specialty distribution of the current physician supply and the specialty choices of new entrants;
- 6) The rates of different types of professional activities (patient care, teaching, research, etc.) of the current physician supply; and
- 7) Physician migration patterns (both into and out of a particular area).

In addition, over the last two decades, the physician workforce experienced a number of key transformations. To the extent that data are available, these transformations should be taken into consideration when forecasting the future supply of physicians:

Demographic Evolution and Physician Work Effort

Women in Medicine

Women have made great strides in medicine over the past 25 years, nearly tripling their representation in the profession. Currently making up more than 28 percent of the physician workforce,⁴⁹ women will continue to become a larger part of the workforce; women comprise nearly 50 percent of the students enrolled in U.S. medical schools.⁵⁰

A number of studies have documented that women work fewer hours over the course of their professional work life than men.⁵¹ This phenomenon may reflect time taken for child-rearing, providing care for elderly parents or

⁴⁹ Smart D. *Physician Characteristics and Distribution in the United States, 2006 Edition*. Chicago, IL: American Medical Association, 2006.

⁵⁰ Appendix 1. Table 3. Journal of the American Medical Association Medical Education Theme Issue, 2008.

⁵¹ Kletke PR, Marder WD, Silberger AB. The growing proportion of female physicians: implications for U.S. physician supply. *American Journal of Public Health*. 1990;80(3):300-304; Bobula JD. Work patterns, practice characteristics and incomes of male and female physicians. *Journal of Medical Education*. 1980;55(10):826-833; Martin SC, Arnold RM, Parker RM. Gender and medical socialization. *Journal of Health and Social Behavior*. 1988;29,December:333-343; Cooper RA. Seeking a balanced physician for the

other relatives, and other family concerns. Recent research has, however, suggested that women are not the only physicians working less. Instead, some⁵² claim this phenomenon of women working fewer hours is part of a larger generational phenomenon, perhaps not limited to medicine.⁵³ Interestingly, there are also some indications that older physicians are reducing the hours they work.⁵⁴

Aging of the Physician Workforce

Like the general U.S. population, physicians, as a group, are growing older. In fact, between 1982 and 2004 the proportion of active physicians age 65 and older increased from 8 percent to 11 percent. In 2004, there were more than 84,000 active physicians who were age 65 years or older, another 142,000 between age 55 and 64 who will reach age 65 by 2014, and another 215,000 between age 45 and 54 who will reach age 65 by 2024.⁵⁵

Separation from the Physician Workforce

In some ways separation from the physician workforce is related to age. As a physician ages, he/she is more likely to leave practice for one reason or another, be it retirement, death, or other causes. With the aging of the physician population, a larger and larger proportion of the physician workforce will be reaching the traditional age of retirement in the near future.

There is no way to know with certainty the actual retirement patterns of physicians in future years. If the baby boom generation of physicians retires earlier than past generations, this would significantly reduce the supply of physicians in the next decade. On the other hand, if physicians are working fewer hours per week due to changing lifestyle choices, they may stay in practice for a longer period of time, not having as much chance to “burnout” or become dissatisfied for some other reason. This phenomenon might lead to an increase in the supply of physicians in the future.

Productivity Changes Due to Technology Developments

twenty-first century. *Journal of the American Medical Association*. 1994;272(9):680-687; Australian Medical Workforce Advisory Committee/Australian Institute of Health and Welfare. *Female Participation in the Australian Medical Workforce*. Sydney, Australia: Australian Medical Workforce Advisory Committee; 1996; Australian Medical Workforce Advisory Committee/Australian Institute of Health and Welfare. *Medical Workforce Supply and Demand In Australia-A Discussion Paper*. Sydney, Australia: Australian Medical Workforce Advisory Committee; 1998; Sullivan P, Buske L. Results from CMA’s huge 1998 physician survey point to a dispirited profession. *Canadian Medical Association Journal*. 1998;159(5):525-528; Forte GJ, Salsberg ES. Women in medicine in New York state: preliminary findings from the 1997-2000 New York state physician licensure re-registration survey. *News of New York*. 1999;54(9):7, 13.

⁵² Bland KI, Issacs G. Contemporary trends in student selection of medical specialties: the potential impact on general surgery. *Archives of Surgery*. 2002;137(9):1078-1079; Gelfand DV, Podnos YD, Wilson SE, Cooke J, Williams RA. Choosing general surgery: insights into career choices of current medical students. *Archives of Surgery*. 2002;137(9):941-945; Dorsey ER, Jarjoura D, Rutecki GW. Influence of controllable lifestyle on recent trends in specialty choice by U.S. medical students. *Journal of the American Medical Association*. 2003;290(9): 1173-1178.

⁵³ Bond JT, Galinsky E, Swanberg JE. *National Study of the Changing Workforce*. New York, NY: Families and Work Institute; 1998; Lang J. It’s time over money for this generation. *Journal of Commerce*. 2000;1:7; Gutner T. A Balancing act for Gen X women. *Business Week*. 2002; 21 January:82.

⁵⁴ Cooper RA. There’s a shortage of specialists: is anyone listening? *Academic Medicine*. 2002;77(8):761-766.

⁵⁵ American Medical Association. *Physician Characteristics and Distribution in the U.S. 1984 Edition*. Chicago, IL: AMA Press; 1984; American Medical Association. *Physician Characteristics and Distribution in the U.S. 2006 Edition*. Chicago, IL. AMA Press; 2006.

Another important factor than can influence the available supply of physicians is their productivity. Productivity, in this instance, is defined as output per unit of time spent in practice. Currently, there are, and certainly in the future there will be more, changes occurring in medical practice that allow physicians to practice more efficiently. New medical technologies, particularly in the area of information systems, could lead to an increase in physician productivity. For example, the electronic medical record could allow physicians to quickly, easily, and accurately access and assess all the necessary information on a patient's history instead of ordering the file be sent, then shuffling through the pages in the file. Estimates of the potential productivity gains through the use of new technologies or implementation of already existing technologies are widely variable.⁵⁶ A recent study suggests a potential gain in productivity of up to 20 percent through the use of technology.⁵⁷

Resident and Fellow Work Hour Restrictions

The recent implementation of regulations limiting resident and fellow work hours to 80 or fewer should be taken into account when estimating the future physician supply. While the general impact of these regulations is clear – the total supply of physicians (FTEs) will decrease -- it is unclear what the magnitude of the effect will be. It is uncertain how much of the reduction in hours worked per week will come from patient care time compared to time for educational activities. It is also possible that reduced work hours during training and increased flexibility in scheduling will contribute to changes in new physicians' practice patterns after training such as increased job sharing and reduced patient care hours, potentially amplifying the different practice patterns already observed among the newest generation of physicians.

Specialty Distribution and Choices

The issue of specialty distribution and choice has less to do with the overall supply of physicians than with the types of services provided by physicians. The specific specialty a physician practices has implications for the types of services provided. There have been a number of attempts at understanding the reasons behind physicians' specialty choices.⁵⁸ The factors most often cited to explain variation in specialty choice include expected income, intellectual content of the specialty, research opportunities in the specialty, prestige of the specialty, gender and race/ethnicity of the physician, and family considerations.

Changing Physician Professional Activities

Being a physician involves a variety of activities, including patient care, medical teaching, medical research, and other professional pursuits. Physicians, however, are not limited to those types of activities. The rate at

⁵⁶ Blumenthal D. Doctors in a wired world: can professionalism survive technology? *Milbank Quarterly*. 2002;80(3):525-546; Masys DR. Effects of current and future information technologies on the health care workforce. *Health Affairs*. 2002;21(5):33-41; Goldsmith J, Blumenthal D, Rishel W. Federal health information policy: a case of arrested development. *Health Affairs*. 2003;22(4):44-55.

⁵⁷ Corrigan J. *Searching for the Next Magic Bullet: Examining New Approaches*. Presented at a session at the AcademyHealth Annual Research Meeting. Nashville, TN. 28 June 2003.

⁵⁸ Hay JW. Physician's specialty choice and specialty income. In: Duru G, Paelink JHP, eds. *Econometrics of Health Care*. Netherlands: Kluwer Academic Publishers; 1991; Hurley JE. Physician's choice of specialty, location and mode. *Journal of Human Resources*. 1991;26(1):47-71; Nicholson S. Physician specialty choice under uncertainty. *Journal of Labor Economics*. 2002;20(4):816-847; Puccio K, Forte GJ, Beaulieu M, Ayers M, Salsberg ES. *Specialty Choices Among Second Year Pediatric and Internal Medicine Residents*. Rensselaer, NY: Center for Health Workforce Studies; 2002. Newton DA, Grayson MS. Trends in career choice by U.S. medical school graduates. *Journal of the American Medical Association*. 2003;290(9):1179-1182; Dorsey ER, Jarjoura D, Rutecki GW. Influence of controllable lifestyle on recent trends in specialty choice by U.S. medical students. *Journal of the American Medical Association*. 2003;290(9):1173-1178.

which the supply of physicians participates in activities within their field of expertise (i.e., medicine) and activities outside the realm of medicine directly affects the number of available physicians. If activities outside of the scope of what are currently considered the professional activities of a physician (e.g., physicians working as financial analysts, insurance consultants, pharmaceutical consultants) become more attractive to physicians, the supply of physicians will decrease.

Moreover, changes in the distribution of activities in which a physician participates could also have effects on the supply of physicians. For example, the average physician typically spends the most amount of his/her time in patient care. If more physicians devoted more time to research, the supply of physicians providing patient care services would decrease.

Demand

In order to accurately forecast the demand for physicians in a geographic location, it is helpful to take into consideration the following:

- 1) Physician utilization rates by age, gender, and race/ethnicity;
- 2) Physician utilization rates by practice setting and insurance status; and
- 3) Current and future population counts by age, gender, race/ethnicity, practice setting, and insurance status.

In addition, forecasts of the future demand for physicians should seek to account for the following key factors:

Population Wealth

Based on a perspective currently championed by Cooper et al.⁵⁹ (past proponents include Schwartz and colleagues⁶⁰ and Roehrig and Eisenstein⁶¹), the trend in population wealth should be considered in demand forecasts. This perspective suggests that there are four major factors driving demand for physician services: economic expansion, population growth, work effort of physicians, and services provided by other practitioners (i.e., non-physician clinicians). Cooper et al. suggested the most important of the four factors affecting physician demand is economic expansion. They found a consistent correlation between the supply of physicians and economic growth. However, Cooper and colleagues suggested that the relationship is complex. Economic growth induced growth in demand for health services, causing a rise in health care spending. This growth in health care spending, in turn, led to a growth in the health care workforce, of which physicians are an important part.

⁵⁹ Cooper RA, Getzen TE, McKee HJ, Laud P. Economic and demographic trends signal an impending physician shortage. *Health Affairs*. 2002;21(1):140-154; Cooper RA, Getzen TE, Laud P. Economic expansion is a major determinant of physician supply and utilization. *Health Services Research*. 2003;38(2):675-696.

⁶⁰ Schwartz RW, Jarecky RK, Strodel WE, Haley JV, Young B, Griffen WO. Controllable lifestyle: a new factor in career choice by medical students. *Academic Medicine*. 1989;64(10) 606-609; Schwartz RW, Haley JV, Williams C, Jarecky RK, Strodel WE, Young B, Griffen WO. The controllable lifestyle factor and students' attitudes about specialty selection. *Academic Medicine*. 1990;65(3):207-210.

⁶¹ Roehrig C, Eisenstein S. Vector research, inc. report to the American Academy of Neurology Workforce Task Force study. In: Bradley, WG, ed. *Neurology in the Next Two Decades: Report of the Workforce Task Force of the American Academy of Neurology*. St. Paul, MN: American Academy of Neurology; 1999.

This perspective is certainly not without opponents.⁶² It is easy to believe that in an environment of increasing health care costs and declining budgets, resistance to this sort of perspective is assured. However, few peer-reviewed research articles have presented data that challenge Cooper and colleagues' findings.⁶³

Utilization Rate Changes

By definition, the most important drivers of demand for physicians are utilization rates. Thus, it is important to understand how those rates might be changing over time. With respect to age, independent investigation shows that utilization rates are changing. Most observers are familiar with findings that indicate that as the population grows older, overall utilization increases because utilization rates increase with age. The number of people older than age 65 is increasing and will increase significantly in the coming years. Clearly, the aging of the population will lead to an increase in demand for physician services. However, if one examines utilization rates over time, especially physician office visits, it becomes evident that use rates by age group are changing.

Analysis of the National Ambulatory Medical Care Survey (NAMCS) data from 1980, 1990, and 2000 on visits to physician offices by age group indicated that the number of physician visits per capita for age groups older than age 45 has been increasing over the past couple of decades. There is reason to believe that this trend will continue over the next decade and may even accelerate as the baby boom generation ages. The baby boom generation has grown up with high expectations for health care and experienced higher utilization rates than those of previous generations. In addition, as baby boomers age, many, although certainly not all, will have disposable income that they may choose to spend on health care.⁶⁴

Between 1980 and 2000, crude per capita visits to physician offices increased from 2.4 to 2.9. This increase was not evenly distributed across age groups, however. The largest gain was experienced among persons 75 to 84 years of age, increasing from 3.5 visits to 6.3 visits annually. All of the other groups older than age 45 experienced gains as well, except the age 85 and older group. It turns out, however, that even though there was a global increase in utilization, for persons in the age 15 to 24 and the age 25 to 34 groups, utilization rates declined between 1980 and 2000. Further, the more recent changes in utilization (i.e., 1990 compared to 2000) demonstrated a uniform set of increases and declines, with all groups younger than age 45 experiencing declines in annual per capita visits to physician offices and those age 45 and older experiencing increases in annual per capita physician office visit rates.

Elimination of Unnecessary Services

One of the problems associated with using actual utilization rates observed in the population under study is that while they are accurate, they too closely resemble reality, including not only the beneficial qualities of the current health care delivery system, but also its faults. In particular, the unnecessary services common in the current health care delivery system are reflected in those utilization rates.

There are a number of reasons to believe some current use is unnecessary or only marginally beneficial. Possible causes include poor physician performance due to an oversupply of physicians in a geographical area,

⁶² Grumbach K. The ramifications of specialty-dominated medicine. *Health Affairs*. 2002b;21(1) 155-157; Barer M. New opportunities for old mistakes. *Health Affairs*. 2002;21(1) 169-171; Weiner JP. A shortage of physicians or a surplus of assumptions. *Health Affairs*. 2002;21(1) 160-162.

⁶³ Anderson GF, Reinhardt UE, Hussey PS, Petrosyan V. It's the prices, stupid: why the United States is so different from other countries. *Health Affairs*. 2003;22(3):89-105.

⁶⁴ Knickman JR, Hunt KA, Snell EK, Alecxih LM, Kennell DL. Wealth patterns among elderly Americans: implications for health care affordability. *Health Affairs*. 2003;22(3):168-174.

the complexities of current treatment modalities and the inability of individual physicians to sort through them competently enough to make an appropriate decision about which tests or treatments are appropriate, advertisements targeted toward the public that induce patients to request services from their physicians, the financial pressure on facilities, the outright greed of a very small minority in the medical profession, the ongoing medical liability crisis and the resultant practice of “defensive medicine,” and a financing/reimbursement system that gives incentives to provide services without regard to outcomes. Regardless of the causes of the unnecessary provision, there exists a long-standing, compelling argument that a substantial portion of the services provided by physicians and other practitioners in the health care delivery system are simply unnecessary or of marginal benefit. Further, it is argued that it is these unnecessary services that are driving up health care costs and spending in the aggregate. And thus, proponents of this perspective argue that the elimination of these unnecessary and marginal services provides two essential goods: efficiency and cost savings.⁶⁵

The work of Wennberg and colleagues showing the diminishing rates of benefit to the community of additional physicians can certainly be thought of as supporting this perspective. Recently, the work of Fisher et al.⁶⁶ showing the lack of a relationship (and sometimes a negative relationship) between the provision of services, level of spending on services, health care outcomes, and patient satisfaction provides additional support for the perspective. Recent work by Goodman et al.⁶⁷ also provides evidence of the lack of relationship between quantity of end-of-life services and quality of care provided to Medicare beneficiaries.

Approaching the issue from a slightly different perspective, Weiner⁶⁸ and others⁶⁹ have attempted to estimate demand for physician services in a way that bypasses these unnecessary services by examining closed, organized systems of health care delivery that employ more or less rigorous utilization review. In the early and mid-1990s, these examinations revolved around staff-model HMOs. This work has most recently evolved to examine large prepaid group practices having contracts with managed care plans.⁷⁰ The earlier work found that staff-model HMOs were able to provide equivalent quality of care with drastically smaller physician staffing levels. Those who looked more closely at these organizations found that patients were actually using quite a bit

⁶⁵ Fisher ES, Wennberg DE, Stukel TA, Gottlieb DJ, Lucas FL, Pinder EL. The implications of regional variations in Medicare spending. part 1: the content, quality, and accessibility of care. *Annals of Internal Medicine*. 2003a;138(4):273-287.

⁶⁶ Fisher ES, Wennberg DE, Stukel TA, Gottlieb DJ, Lucas FL, Pinder EL. The implications of regional variations in Medicare spending. part 1: the content, quality, and accessibility of care. *Annals of Internal Medicine*. 2003a;138(4):273-287.; Fisher ES, Wennberg DE, Stukel TA, Gottlieb DJ, Lucas FL, Pinder EL. The implications of regional variations in Medicare spending. part 2: health outcomes and satisfaction with care. *Annals of Internal Medicine*. 2003b;138(4):288-298.

⁶⁷ Goodman DC, Stukel TA, Chang C, Wennberg JE. End-of-life care at academic medical centers: implications for future workforce requirements. *Health Affairs*. 2006;25(2) 521-531.

⁶⁸ Weiner JP. Forecasting the effects of health reform on U.S. physician workforce requirement. evidence from HMO staffing patterns. *Journal of the American Medical Association*. 1994;272(3):222-230; Weiner JP. *Assessing Current and Future U.S. Physician Requirements Based on HMO Staffing Rates: A Synthesis of New Sources of Data and Forecasts for the years 2000 and 2020*.

Washington, DC: U.S. Department of Health & Human Services, Bureau of Health Professions. HRSA 94-576(P); 1995; Weiner JP. Prepaid group practice staffing and U.S. physician supply: lessons for workforce policy. *Health Affairs*. Web Exclusive. February 4, 2004.

⁶⁹ Hart LG, Wagner E, Pirzada S, Nelson AF, Rosenblatt RA. Physician staffing ratios in staff-model HMOs: a cautionary tale. *Health Affairs*. 1997;16(1):55-70; Goodman DC, Fisher ES, Bubolz TA, Mohr JE, Poage JF, Wennberg JE. Benchmarking the U.S. physician workforce. an alternative to needs-based or demand-based planning. *Journal of the American Medical Association*. 1997;276(22):1811-1817.

⁷⁰ Weiner JP. Prepaid group practice staffing and U.S. physician supply: lessons for workforce policy. *Health Affairs*. Web Exclusive. February 4, 2004.

of out-of-network services and challenged this early work.⁷¹ This work continues, however; and the most recent updates show that while in the past these delivery systems may have required lower staffing levels, over time they expanded – although not quite to the levels observed outside of these delivery systems. The most recent research in this area,⁷² suggests that between 20 and 35 percent of services currently provided are unnecessary or would not occur under a more rigorous system of utilization review.

⁷¹ Hart LG, Wagner E, Pirezada S, Nelson AF, Rosenblatt RA. Physician staffing ratios in staff-model HMOs: a cautionary tale. *Health Affairs*. 1997;16(1):55-70.

⁷² Fisher ES, Wennberg DE, Stukel TA, Gottlieb DJ, Lucas FL, Pinder EL. The implications of regional variations in Medicare spending. part 2: health outcomes and satisfaction with care. *Annals of Internal Medicine*. 2003b;138(4):288-298.; Weiner JP. Prepaid group practice staffing and U.S. physician supply: lessons for workforce policy. *Health Affairs*. Web Exclusive. February 4, 2004.

Chapter 7: New York Physician Supply Forecasting

State Level Physician Supply Forecasts

Forecasts of the supply of physicians⁷³ in New York were based upon the methodology employed in the Physician Supply Model (PSM) developed and maintained by the Bureau of Health Professions, in the Health Resources and Services Administration of the Department of Health and Human Services and used to generate national forecasts for the COGME report referenced above. The PSM forecasts the future supply of physicians according to the following steps:

- Current counts of active physicians (allopathic and osteopathic) are tabulated by age, gender, year of graduation, and specialty
- Numbers of newly-trained physicians expected to enter graduate medical education (GME) each year (new entrants) are estimated by age and gender
- Forecast counts of active physicians are generated by reducing current counts by the estimated numbers of deaths and retirements and then adding in new entrants

In order to apply this national methodology to the state of New York, it was necessary to adjust the model results to account for interstate migration of active physicians.

The methodology described above was implemented for New York as follows:

- Counts of active physicians by age, gender, and specialty were tabulated from the Center for Health Workforce Studies' database of physicians licensed to practice in New York⁷⁴
- Numbers of new GME entrants were estimated from historical data on first-year GME physicians in New York culled from the AMA's Graduate Medical Education Database archive
- Specialty distributions were estimated for newly entering cohorts based upon historical trends in specialties of recent New York physician cohorts
- PSM parameters were used to forecast deaths and retirements
- The net migration adjustment was estimated based upon an examination of historical trends in net migration of physicians

Forecasts of physician supply were developed under a number of scenarios. In what follows, descriptions of the scenarios as well as the forecasting results are presented.

⁷³ All active physicians, including residents/fellows and non-patient care physicians active as educators, researchers, and administrators, are considered part of the physician supply.

⁷⁴ These data were used to adjust counts of physicians in the New York from the American Medical Association's Masterfile of physicians, the main source of data for the PSM.

Physician Supply Forecast Scenarios and Assumptions

The generic assumptions of all of the supply scenarios were that the capacity to train physicians in New York would remain constant over the forecast period; physician specialization patterns would remain consistent with recent trends among physicians in the state; and physician retirement rates controlling for age, gender, location of medical school, and specialty would remain consistent with recent trends. Below the additional assumptions from each scenario are described.

In the first supply scenario, considered the baseline supply scenario, it was further assumed that: 1) the net migration of physicians to the state would remain constant over the forecast period, and 2) nurse practitioners (NPs) and physician assistants (PAs) would grow at the same rate as physicians over the forecast period.

In the second supply scenario, in addition to the generic assumptions, it was assumed that: 1) the net migration of physicians to the state would remain constant over the forecast period, and 2) NPs and PAs would grow more quickly than physicians. Within this scenario, two NP/PA growth rates were modeled: 1) the same rate they grew between 2002 and 2008 (adding nearly 1,000 new practitioners annually); and 2) half the rate they grew between 2002 and 2008 (adding about 500 new practitioners annually) over the forecast period.

In the third supply scenario, in addition to the generic assumptions, it was assumed that: 1) the net migration of physicians to the state would change over the forecast period, and 2) NPs and PAs would grow at the same rate as physicians over the forecast period. Within this scenario, two net migration alternatives were modeled. The first alternative was that the state will retain 100 additional physicians annually beginning in 2009. This alternative closely paralleled the goals of New York State Department of Health's recently implemented *Doctors Across New York* program. The first alternative was further explored by modeling three potential specialty distributions for these additional 100 physicians: 1) 33 percent primary care/67 percent non-primary care, 2) 25 percent primary care/75 percent non-primary care, and 3) 20 percent primary care/80 percent non-primary care. Recently, the distribution for new physicians was approximately 27 percent primary care and 73 percent non-primary care. The second alternative was that the state would retain 100 fewer physicians annually beginning in 2009. This alternative portrayed the potential outcome of increased competition for physicians among states given the national physician shortage context.

In addition to the scenarios described above, an additional parameter was manipulated in the regional forecasts: the effect of changes in anticipated demand on physicians' practice location decisions. The first regional supply forecast assumed that the geographic distribution of physicians in the state would remain constant over the forecast period; that is, changes in the regional distribution of demand would have no effect on physicians' practice location decisions. The second regional supply forecast assumed that the geographic distribution of physicians in the state would be responsive to anticipated changes in demand; that is, physicians would move into areas at a greater rate where physician demand is growing and leave areas at a greater rate where demand is declining or not growing as quickly as in other regions.

New York Physician Supply, 2006 – 2030

State Level Supply Scenario 1: Baseline

The supply model forecast a 9.9 percent increase in the supply of physicians between 2006 and 2030, with the number of active physicians predicted to increase from 75,489 in 2006 to 82,942 in 2030. Adjusting for the projected population growth in the state (3.8 percent), the physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 414.6 physicians per 100,000 population in 2025, and then decline to 414.1 physicians per 100,000 population in 2030.

Figure 1 – New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	75,489	391.3
2010	78,336	402.7
2015	80,846	411.1
2020	82,291	414.5
2025	82,841	414.6
2030	82,942	414.1
Percent change 2006-2030	9.9%	5.8%
Annualized change 2006-2030	0.39%	0.24%

Primary care physicians were forecast to grow by 4.7 percent between 2006 and 2030, with the number of active physicians predicted to increase from 25,289 in 2006 to 27,140 in 2020, and then decline to 26,489 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to increase from 131.1 physicians per 100,000 population in 2006 to 136.7 physicians per 100,000 population in 2020, and then decline to 132.3 physicians per 100,000 population in 2030.

Non-primary care physicians were also forecast to grow by 12.5 percent between 2006 and 2030, with the number of active physicians predicted to increase from 50,200 in 2006 to 56,453 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 281.9 physicians per 100,000 population in 2030.

Figure 2 – New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	26,388	135.6	2010	51,948	267.0
2015	26,973	137.2	2015	53,873	274.0
2020	27,140	136.7	2020	55,151	277.8
2025	26,933	134.8	2025	55,908	279.8
2030	26,489	132.3	2030	56,453	281.9
Percent change 2006-2030	4.7%	0.9%	Percent change 2006-2030	12.5%	8.3%
Annualized change 2006-2030	0.19%	0.04%	Annualized change 2006-2030	0.49%	0.33%

Specialty-Specific Supply Forecasts

The supply model forecasts for 18 specialty groups through 2030 in New York. In most cases in this scenario, the supply of physicians was forecast to grow between 2006 and 2030. Specialty-specific supply forecasts fell into three patterns. A number of specialties were projected to experience growth over the entire forecast period: anesthesiology, cardiovascular disease, emergency medicine, general pediatrics, general surgery, orthopedic surgery, radiology, and other internal medicine subspecialties. A number of specialties were projected to experience a period of growth, then begin to decline between 2015 and 2025 to the end of the forecast period: general internal medicine, general/family medicine, obstetrics and gynecology, otolaryngology, and other specialties. Finally, there were a number of specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, psychiatry, urology, and other surgical specialties.

Primary Care Specialties

General/Family Medicine

General/family physicians were forecast to decline by 1.2 percent between 2006 and 2030, unlike the overall predicted rate of growth among primary care physicians, with the number of active general/family physicians predicted to increase from 5,108 in 2006 to 5,371 in 2015, then decline to 5,048 in 2030. Adjusting for the projected population growth in the state, the general/family physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 27.3 physicians per 100,000 population in 2020, then decline to 25.2 physicians per 100,000 population in 2030.

General Internal Medicine

General internists were forecast to grow by 4.0 percent between 2006 and 2030, slightly below the overall predicted rate of growth among primary care physicians, with the number of active general internists predicted to increase from 14,242 in 2006 to 15,294 in 2020, then decline to 14,810 in 2030. Adjusting for the projected population growth in the state, the general internist to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 77.5 physicians per 100,000 population in 2015, then decline to 73.9 physicians per 100,000 population in 2030.

General Pediatrics

General pediatricians were forecast to grow by 11.6 percent between 2006 and 2030, well above the overall predicted rate of growth among primary care physicians, with the number of active general pediatricians predicted to increase from 5,939 in 2006 to 6,631 in 2030. Adjusting for the projected population growth in the state, the general pediatrician to population ratio was predicted to increase from 30.8 physicians per 100,000 population in 2006 to 33.1 physicians per 100,000 population in 2030.

Figure 3 – New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	26,388	135.6	2010	5,250	27.0
2015	26,973	137.2	2015	5,371	27.3
2020	27,140	136.7	2020	5,361	27.0
2025	26,933	134.8	2025	5,246	26.3
2030	26,489	132.3	2030	5,048	25.2
Percent change 2006-2030	4.7%	0.9%	Percent change 2006-2030	-1.2%	-4.8%
Annualized change 2006-2030	0.19%	0.04%	Annualized change 2006-2030	-0.05%	-0.21%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,967	76.9	2010	6,171	31.7
2015	15,249	77.5	2015	6,353	32.3
2020	15,294	77.0	2020	6,484	32.7
2025	15,123	75.7	2025	6,564	32.8
2030	14,810	73.9	2030	6,631	33.1
Percent change 2006-2030	4.0%	0.2%	Percent change 2006-2030	11.6%	7.5%
Annualized change 2006-2030	0.16%	0.01%	Annualized change 2006-2030	0.46%	0.30%

Non-Primary Care Specialties

Cardiovascular Disease

Cardiologists were forecast to grow by 31.0 percent between 2006 and 2030, far greater than the overall predicted growth among non-primary care physicians, with the number of active cardiologists predicted to increase from 2,335 in 2006 to 3,059 in 2030. Adjusting for the projected population growth in the state, the cardiologist to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 15.3 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

Other internal medicine subspecialists were forecast to grow by 43.6 percent between 2006 and 2030, far greater than the overall predicted rate of growth among non-primary care physicians, with the number of active physicians predicted to increase from 8,974 in 2006 to 12,889 in 2030. Adjusting for the projected population growth in the state, the other internal medicine subspecialist to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 64.4 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

Obstetricians and gynecologists were forecast to grow by 5.1 percent between 2006 and 2030, well below the overall predicted rate of growth among non-primary care physicians, with the number of active obstetricians and gynecologists predicted to increase from 3,832 in 2006 to 4,079 in 2020, then decline to 4,027 in 2030. Adjusting for the projected population growth in the state, the obstetrician and gynecologist to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 20.6 physicians per 100,000 population in 2015, then decline to 20.1 physicians per 100,000 population in 2030.

Pathology

Pathologists were forecast to decline by 25.0 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active pathologists predicted to decrease from 1,716 in 2006 to 1,286 in 2030. Adjusting for the projected population growth in the state, the pathologist to population ratio was predicted to decrease from 8.9 physicians per 100,000 population in 2006 to 6.4 physicians per 100,000 population in 2030.

Figure 4 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,447	12.6	2010	9,630	49.5
2015	2,644	13.4	2015	10,634	54.1
2020	2,806	14.1	2020	11,511	58.0
2025	2,932	14.7	2025	12,230	61.2
2030	3,059	15.3	2030	12,889	64.4
Percent change 2006-2030	31.0%	26.2%	Percent change 2006-2030	43.6%	38.3%
Annualized change 2006-2030	1.13%	0.97%	Annualized change 2006-2030	1.52%	1.36%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,944	20.3	2010	1,637	8.4
2015	4,046	20.6	2015	1,552	7.9
2020	4,079	20.5	2020	1,468	7.4
2025	4,064	20.3	2025	1,378	6.9
2030	4,027	20.1	2030	1,286	6.4
Percent change 2006-2030	5.1%	1.2%	Percent change 2006-2030	-25.0%	-27.8%
Annualized change 2006-2030	0.21%	0.05%	Annualized change 2006-2030	-1.19%	-1.35%

Psychiatry

Psychiatrists were forecast to decline by 15.0 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active psychiatrists predicted to decrease from 6,166 in 2006 to 5,238 in 2030. Adjusting for the projected population growth in the state, the psychiatrist to population ratio was predicted to decrease from 32.0 physicians per 100,000 population in 2006 to 26.2 physicians per 100,000 population in 2030.

Anesthesiology

Anesthesiologists were forecast to grow by 10.6 percent between 2006 and 2030, slightly below the overall predicted growth among non-primary care physicians, with the number of active anesthesiologists predicted to increase from 3,695 in 2006 to 4,085 in 2030. Adjusting for the projected population growth in the state, the anesthesiologist to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 20.4 physicians per 100,000 population in 2030.

Radiology

Radiologists were forecast to grow by 19.0 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active radiologists predicted to increase from 3,548 in 2006 to 4,221 in 2030. Adjusting for the projected population growth in the state, the radiologist to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 21.1 physicians per 100,000 population in 2030.

Emergency Medicine

Emergency medicine physicians were forecast to grow by 57.2 percent between 2006 and 2030, far above the overall predicted growth among non-primary care physicians, with the number of active emergency medicine physicians predicted to increase from 2,712 in 2006 to 4,265 in 2030. Adjusting for the projected population growth in the state, the emergency medicine physician to population ratio was predicted to increase from 14.1 physicians per 100,000 population in 2006 to 21.3 physicians per 100,000 population in 2030.

Figure 5 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,086	31.3	2010	3,830	19.7
2015	5,984	30.4	2015	3,857	19.6
2020	5,737	28.9	2020	3,998	20.1
2025	5,469	27.4	2025	4,073	20.4
2030	5,238	26.2	2030	4,085	20.4
Percent change 2006-2030	-15.0%	-18.2%	Percent change 2006-2030	10.6%	6.5%
Annualized change 2006-2030	-0.68%	-0.83%	Annualized change 2006-2030	0.42%	0.26%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,793	19.5	2010	2,988	15.4
2015	3,982	20.2	2015	3,377	17.2
2020	4,091	20.6	2020	3,723	18.7
2025	4,165	20.8	2025	4,022	20.1
2030	4,221	21.1	2030	4,265	21.3
Percent change 2006-2030	19.0%	14.6%	Percent change 2006-2030	57.2%	51.4%
Annualized change 2006-2030	0.73%	0.57%	Annualized change 2006-2030	1.90%	1.74%

General Surgery

General surgeons were forecast to grow by 17.3 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active general surgeons predicted to increase from 2,683 in 2006 to 3,146 in 2030. Adjusting for the projected population growth in the state, the general surgeons to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 15.7 physicians per 100,000 population in 2030.

Ophthalmology

Ophthalmologists were forecast to decline by 18.9 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active ophthalmologists predicted to decrease from 1,974 in 2006 to 1,601 in 2030. Adjusting for the projected population growth in the state, the ophthalmologist to population ratio was predicted to decrease from 10.2 physicians per 100,000 population in 2006 to 8.0 physicians per 100,000 population in 2030.

Otolaryngology

Otolaryngologists were forecast to decline by 6.0 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active otolaryngologists predicted to increase from 828 in 2006 to 835 in 2015, then decline to 778 in 2030. Adjusting for the projected population growth in the state, the otolaryngologist to population ratio was predicted to decline from 4.3 physicians per 100,000 population in 2006 to 3.9 physicians per 100,000 population in 2030.

Orthopedic Surgery

Orthopedic surgeons were forecast to grow by 10.4 percent between 2006 and 2030, somewhat below the overall predicted growth among non-primary care physicians, with the number of active orthopedic surgeons predicted to increase from 1,931 in 2006 to 2,132 in 2030. Adjusting for the projected population growth in the state, the orthopedic surgeon to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 10.6 physicians per 100,000 population in 2030.

Figure 6 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

General Surgery			Ophthalmology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,820	14.5	2010	1,924	9.9
2015	2,955	15.0	2015	1,852	9.4
2020	3,024	15.2	2020	1,774	8.9
2025	3,093	15.5	2025	1,679	8.4
2030	3,146	15.7	2030	1,601	8.0
Percent change 2006-2030	17.3%	12.9%	Percent change 2006-2030	-18.9%	-21.9%
Annualized change 2006-2030	0.67%	0.51%	Annualized change 2006-2030	-0.87%	-1.03%

Otolaryngology			Orthopedic Surgery		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	829	4.3	2010	1,999	10.3
2015	835	4.2	2015	2,046	10.4
2020	818	4.1	2020	2,084	10.5
2025	807	4.0	2025	2,108	10.5
2030	778	3.9	2030	2,132	10.6
Percent change 2006-2030	-6.0%	-9.5%	Percent change 2006-2030	10.4%	6.3%
Annualized change 2006-2030	-0.26%	-0.41%	Annualized change 2006-2030	0.41%	0.26%

Urology

Urologists were forecast to decline by 18.8 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active urologists predicted to decrease from 937 in 2006 to 761 in 2030. Adjusting for the projected population growth in the state, the urologist to population ratio was predicted to decline from 4.9 physicians per 100,000 population in 2006 to 3.8 physicians per 100,000 population in 2030.

Other Surgery Subspecialties

Other surgical subspecialists were forecast to decline by 13.1 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to decrease from 1,399 in 2006 to 1,215 in 2030. Adjusting for the projected population growth in the state, the other surgical subspecialist to population ratio was predicted to decrease from 7.3 physicians per 100,000 population in 2006 to 6.1 physicians per 100,000 population in 2030.

Other Specialties

Other specialists were forecast to grow by 3.8 percent between 2006 and 2030, well below the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase slightly from 7,470 in 2006 to 7,887 in 2020, then decline to 7,750 in 2030. Adjusting for the projected population growth in the state, the other specialist to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 40.7 physicians per 100,000 population in 2015, then decline to 38.7 physicians per 100,000 population in 2030.

Figure 7 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	912	4.7	2010	1,386	7.1
2015	873	4.4	2015	1,354	6.9
2020	830	4.2	2020	1,321	6.7
2025	796	4.0	2025	1,271	6.4
2030	761	3.8	2030	1,215	6.1
Percent change 2006-2030	-18.8%	-21.8%	Percent change 2006-2030	-13.1%	-16.3%
Annualized change 2006-2030	-0.86%	-1.02%	Annualized change 2006-2030	-0.59%	-0.74%

Other Specialties		
Year	Physicians	Physicians per 100,000 Population
2006	7,470	38.7
2010	7,724	39.7
2015	7,882	40.1
2020	7,887	39.7
2025	7,821	39.1
2030	7,750	38.7
Percent change 2006-2030	3.8%	-0.1%
Annualized change 2006-2030	0.15%	0.00%

State Level Supply Scenario 2a: NP/PA High Growth

The supply model forecast a 22.2 percent increase in the supply of physicians between 2006 and 2030, with the number of active physicians predicted to increase from 75,489 in 2006 to 92,219 in 2030. Adjusting for the projected population growth in the state (3.8 percent), the physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 460.4 physicians per 100,000 population in 2030.

Figure 8 – New York Physician Supply Forecast, 2006-2030

Year	Physicians	Physicians per 100,000 Population
2006	75,489	391.3
2010	79,913	410.8
2015	84,358	429.0
2020	87,703	441.7
2025	90,142	451.1
2030	92,219	460.4
Percent change 2006-2030	22.2%	17.7%
Annualized change 2006-2030	0.84%	0.68%

Primary care physicians were forecast to grow by 22.3 percent between 2006 and 2030, with the number of active physicians predicted to increase from 25,289 in 2006 to 30,921 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to increase from 131.1 physicians per 100,000 population in 2006 to 154.4 physicians per 100,000 population in 2030.

Non-primary care physicians were also forecast to grow by 22.1 percent between 2006 and 2030, with the number of active physicians predicted to increase from 50,200 in 2006 to 61,297 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 306.0 physicians per 100,000 population in 2030.

Figure 9 – New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	27,152	139.6	2010	52,761	271.2
2015	28,667	145.8	2015	55,691	283.2
2020	29,738	149.8	2020	57,965	291.9
2025	30,429	152.3	2025	59,713	298.8
2030	30,921	154.4	2030	61,297	306.0
Percent change 2006-2030	22.3%	17.8%	Percent change 2006-2030	22.1%	17.6%
Annualized change 2006-2030	0.84%	0.68%	Annualized change 2006-2030	0.84%	0.68%

Specialty-Specific Supply Forecasts

The supply model forecasts for 18 specialty groups through 2030 in New York. In most cases in this scenario, the supply of physicians was forecast to grow between 2006 and 2030. Specialty-specific supply forecasts fell into three patterns. A number of specialties were projected to experience growth over the entire forecast period: anesthesiology, cardiovascular disease, emergency medicine, general internal medicine, general pediatrics, general surgery, obstetrics and gynecology, orthopedic surgery, radiology, other internal medicine

subspecialties, and other specialties. A number of specialties were projected to experience a period of growth, then begin to decline between 2010 and 2025 to the end of the forecast period: general/family medicine, otolaryngology, psychiatry, and other surgical subspecialties. Finally, there were three specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, and urology.

Primary Care Specialties

General/Family Medicine

General/family physicians were forecast to increase by 15.4 percent between 2006 and 2030, which is below the overall predicted rate of growth among primary care physicians, with the number of active general/family physicians predicted to increase from 5,108 in 2006 to 5,927 in 2025, then decline to 5,893 in 2030. Adjusting for the projected population growth in the state, the general/family physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 29.7 physicians per 100,000 population in 2025, then decline to 29.4 physicians per 100,000 population in 2030.

General Internal Medicine

General internists were forecast to grow by 21.4 percent between 2006 and 2030, slightly below the overall predicted rate of growth among primary care physicians, with the number of active general internists predicted to increase from 14,242 in 2006 to 17,289 in 2030. Adjusting for the projected population growth in the state, the general internist to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 86.3 physicians per 100,000 population in 2030.

General Pediatrics

General pediatricians were forecast to grow by 30.3 percent between 2006 and 2030, well above the overall predicted rate of growth among primary care physicians, with the number of active general pediatricians predicted to increase from 5,939 in 2006 to 7,740 in 2030. Adjusting for the projected population growth in the state, the general pediatrician to population ratio was predicted to increase from 30.8 physicians per 100,000 population in 2006 to 38.6 physicians per 100,000 population in 2030.

Figure 10 – New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	27,152	139.6	2010	5,250	27.0
2015	28,667	145.8	2015	5,371	27.3
2020	29,738	149.8	2020	5,361	27.0
2025	30,429	152.3	2025	5,246	26.3
2030	30,921	154.4	2030	5,048	25.2
Percent change 2006-2030	22.3%	17.8%	Percent change 2006-2030	-1.2%	-4.8%
Annualized change 2006-2030	0.84%	0.68%	Annualized change 2006-2030	-0.05%	-0.21%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	15,400	79.2	2010	6,350	32.6
2015	16,207	82.4	2015	6,752	34.3
2020	16,759	84.4	2020	7,105	35.8
2025	17,086	85.5	2025	7,416	37.1
2030	17,289	86.3	2030	7,740	38.6
Percent change 2006-2030	21.4%	16.9%	Percent change 2006-2030	30.3%	25.5%
Annualized change 2006-2030	0.81%	0.65%	Annualized change 2006-2030	1.11%	0.95%

Non-Primary Care Specialties

Cardiovascular Disease

Cardiologists were forecast to grow by 42.2 percent between 2006 and 2030, far greater than the overall predicted growth among non-primary care physicians, with the number of active cardiologists predicted to increase from 2,335 in 2006 to 3,321 in 2030. Adjusting for the projected population growth in the state, the cardiologist to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 16.6 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

Other internal medicine subspecialists were forecast to grow by 56.0 percent between 2006 and 2030, far greater than the overall predicted rate of growth among non-primary care physicians, with the number of active physicians predicted to increase from 8,974 in 2006 to 13,995 in 2030. Adjusting for the projected population growth in the state, the other internal medicine subspecialist to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 69.9 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

Obstetricians and gynecologists were forecast to grow by 14.1 percent between 2006 and 2030, well below the overall predicted rate of growth among non-primary care physicians, with the number of active obstetricians and gynecologists predicted to increase from 3,832 in 2006 to 4,373 in 2030. Adjusting for the projected population growth in the state, the obstetrician and gynecologist to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 21.8 physicians per 100,000 population in 2030.

Pathology

Pathologists were forecast to decline by 18.6 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active pathologists predicted to decrease from 1,716 in 2006 to 1,397 in 2030. Adjusting for the projected population growth in the state, the pathologist to population ratio was predicted to decrease from 8.9 physicians per 100,000 population in 2006 to 7.0 physicians per 100,000 population in 2030.

Figure 11 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,485	12.8	2010	9,781	50.3
2015	2,734	13.9	2015	10,993	55.9
2020	2,949	14.9	2020	12,099	60.9
2025	3,131	15.7	2025	13,062	65.4
2030	3,321	16.6	2030	13,995	69.9
Percent change 2006-2030	42.2%	37.0%	Percent change 2006-2030	56.0%	50.2%
Annualized change 2006-2030	1.48%	1.32%	Annualized change 2006-2030	1.87%	1.71%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	4,006	20.6	2010	1,662	8.5
2015	4,182	21.3	2015	1,605	8.2
2020	4,287	21.6	2020	1,543	7.8
2025	4,341	21.7	2025	1,472	7.4
2030	4,373	21.8	2030	1,397	7.0
Percent change 2006-2030	14.1%	9.9%	Percent change 2006-2030	-18.6%	-21.6%
Annualized change 2006-2030	0.55%	0.39%	Annualized change 2006-2030	-0.85%	-1.01%

Psychiatry

Psychiatrists were forecast to decline by 7.8 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active psychiatrists predicted to increase from 6,166 in 2006 to 6,186 in 2015, then decline to 5,688 in 2030. Adjusting for the projected population growth in the state, the psychiatrist to population ratio was predicted to decrease from 32.0 physicians per 100,000 population in 2006 to 28.4 physicians per 100,000 population in 2030.

Anesthesiology

Anesthesiologists were forecast to grow by 20.0 percent between 2006 and 2030, slightly below the overall predicted growth among non-primary care physicians, with the number of active anesthesiologists predicted to increase from 3,695 in 2006 to 4,436 in 2030. Adjusting for the projected population growth in the state, the anesthesiologist to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 22.1 physicians per 100,000 population in 2030.

Radiology

Radiologists were forecast to grow by 29.2 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active radiologists predicted to increase from 3,548 in 2006 to 4,583 in 2030. Adjusting for the projected population growth in the state, the radiologist to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 22.9 physicians per 100,000 population in 2030.

Emergency Medicine

Emergency medicine physicians were forecast to grow by 70.7 percent between 2006 and 2030, far above the overall predicted growth among non-primary care physicians, with the number of active emergency medicine physicians predicted to increase from 2,712 in 2006 to 4,631 in 2030. Adjusting for the projected population growth in the state, the emergency medicine physician to population ratio was predicted to increase from 14.1 physicians per 100,000 population in 2006 to 23.1 physicians per 100,000 population in 2030.

Figure 12 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,181	31.8	2010	3,890	20.0
2015	6,186	31.5	2015	3,987	20.3
2020	6,030	30.4	2020	4,202	21.2
2025	5,842	29.2	2025	4,350	21.8
2030	5,688	28.4	2030	4,436	22.1
Percent change 2006-2030	-7.8%	-11.2%	Percent change 2006-2030	20.0%	15.6%
Annualized change 2006-2030	-0.34%	-0.49%	Annualized change 2006-2030	0.76%	0.61%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,852	19.8	2010	3,034	15.6
2015	4,116	20.9	2015	3,490	17.7
2020	4,300	21.7	2020	3,913	19.7
2025	4,449	22.3	2025	4,295	21.5
2030	4,583	22.9	2030	4,631	23.1
Percent change 2006-2030	29.2%	24.4%	Percent change 2006-2030	70.7%	64.4%
Annualized change 2006-2030	1.07%	0.91%	Annualized change 2006-2030	2.25%	2.09%

General Surgery

General surgeons were forecast to grow by 27.3 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active general surgeons predicted to increase from 2,683 in 2006 to 3,416 in 2030. Adjusting for the projected population growth in the state, the general surgeons to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 17.1 physicians per 100,000 population in 2030.

Ophthalmology

Ophthalmologists were forecast to decline by 12.0 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active ophthalmologists predicted to decrease from 1,974 in 2006 to 1,738 in 2030. Adjusting for the projected population growth in the state, the ophthalmologist to population ratio was predicted to decrease from 10.2 physicians per 100,000 population in 2006 to 8.7 physicians per 100,000 population in 2030.

Otolaryngology

Otolaryngologists were forecast to decline by 2.0 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active otolaryngologists predicted to increase from 828 in 2006 to 863 in 2015, then decline to 845 in 2030. Adjusting for the projected population growth in the state, the otolaryngologist to population ratio was predicted to increase from 4.3 physicians per 100,000 population in 2006 to 4.4 physicians per 100,000 population in 2015, then decline to 4.2 physicians per 100,000 population in 2030.

Orthopedic Surgery

Orthopedic surgeons were forecast to grow by 19.9 percent between 2006 and 2030, somewhat above the overall predicted growth among non-primary care physicians, with the number of active orthopedic surgeons predicted to increase from 1,931 in 2006 to 2,315 in 2030. Adjusting for the projected population growth in the state, the orthopedic surgeon to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 11.6 physicians per 100,000 population in 2030.

Figure 13 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

General Surgery			Ophthalmology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,864	14.7	2010	1,954	10.0
2015	3,055	15.5	2015	1,914	9.7
2020	3,178	16.0	2020	1,864	9.4
2025	3,304	16.5	2025	1,793	9.0
2030	3,416	17.1	2030	1,738	8.7
Percent change 2006-2030	27.3%	22.6%	Percent change 2006-2030	-12.0%	-15.2%
Annualized change 2006-2030	1.01%	0.85%	Annualized change 2006-2030	-0.53%	-0.69%

Otolaryngology			Orthopedic Surgery		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	842	4.3	2010	2,030	10.4
2015	863	4.4	2015	2,115	10.8
2020	860	4.3	2020	2,190	11.0
2025	861	4.3	2025	2,251	11.3
2030	845	4.2	2030	2,315	11.6
Percent change 2006-2030	2.0%	-1.7%	Percent change 2006-2030	19.9%	15.4%
Annualized change 2006-2030	0.08%	-0.07%	Annualized change 2006-2030	0.76%	0.60%

Urology

Urologists were forecast to decline by 11.8 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active urologists predicted to decrease from 937 in 2006 to 827 in 2030. Adjusting for the projected population growth in the state, the urologist to population ratio was predicted to decline from 4.9 physicians per 100,000 population in 2006 to 4.1 physicians per 100,000 population in 2030.

Other Surgery Subspecialties

Other surgical subspecialists were forecast to decline by 5.7 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase from 1,399 in 2006 to 1,407 in 2010, then decline to 1,319 in 2030. Adjusting for the projected population growth in the state, the other surgical subspecialist to population ratio was predicted to decrease from 7.3 physicians per 100,000 population in 2006 to 6.6 physicians per 100,000 population in 2030.

Other Specialties

Other specialists were forecast to grow by 12.7 percent between 2006 and 2030, well below the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase from 7,470 in 2006 to 8,415 in 2030. Adjusting for the projected population growth in the state, the other specialist to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 42.0 physicians per 100,000 population in 2030.

Figure 14 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	927	4.8	2010	1,407	7.2
2015	903	4.6	2015	1,400	7.1
2020	873	4.4	2020	1,388	7.0
2025	850	4.3	2025	1,358	6.8
2030	827	4.1	2030	1,319	6.6
Percent change 2006-2030	-11.8%	-15.0%	Percent change 2006-2030	-5.7%	-9.2%
Annualized change 2006-2030	-0.52%	-0.68%	Annualized change 2006-2030	-0.24%	-0.40%

Other Specialties		
Year	Physicians	Physicians per 100,000 Population
2006	7,470	38.7
2010	7,845	40.3
2015	8,148	41.4
2020	8,290	41.8
2025	8,353	41.8
2030	8,415	42.0
Percent change 2006-2030	12.7%	8.5%
Annualized change 2006-2030	0.50%	0.34%

State Level Supply Scenario 2b: NP/PA Lower Growth

The supply model forecast a 15.8 percent increase in the supply of physicians between 2006 and 2030, with the number of active physicians predicted to increase from 75,489 in 2006 to 87,386 in 2030. Adjusting for the projected population growth in the state (3.8 percent), the physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 436.3 physicians per 100,000 population in 2030.

Figure 15 – New York Physician Supply Forecast, 2006-2030

Year	Physicians	Physicians per 100,000 Population
2006	75,489	391.3
2010	79,473	408.5
2015	82,820	421.2
2020	85,067	428.4
2025	86,408	432.4
2030	87,386	436.3
Percent change 2006-2030	15.8%	11.5%
Annualized change 2006-2030	0.61%	0.45%

Primary care physicians were forecast to grow by 13.2 percent between 2006 and 2030, with the number of active physicians predicted to increase from 25,289 in 2006 to 28,632 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to increase from 131.1 physicians per 100,000 population in 2006 to 143.5 physicians per 100,000 population in 2020, then decline slightly to 143.0 physicians per 100,000 population in 2030.

Non-primary care physicians were also forecast to grow by 17.0 percent between 2006 and 2030, with the number of active physicians predicted to increase from 50,200 in 2006 to 58,754 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 293.3 physicians per 100,000 population in 2030.

Figure 16 – New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	26,943	138.5	2010	52,530	270.0
2015	27,939	142.1	2015	54,882	279.1
2020	28,490	143.5	2020	56,577	285.0
2025	28,660	143.4	2025	57,748	289.0
2030	28,632	143.0	2030	58,754	293.3
Percent change 2006-2030	13.2%	9.0%	Percent change 2006-2030	17.0%	12.7%
Annualized change 2006-2030	0.52%	0.36%	Annualized change 2006-2030	0.66%	0.50%

Specialty-Specific Supply Forecasts

The supply model forecasts for 18 specialty groups through 2030 in New York. In most cases in this scenario, the supply of physicians was forecast to grow between 2006 and 2030. Specialty-specific supply forecasts fell into three patterns. A number of specialties were projected to experience growth over the entire forecast period: anesthesiology, cardiovascular disease, emergency medicine, general pediatrics, general surgery, orthopedic

surgery, radiology, and other internal medicine subspecialties. A number of specialties were projected to experience a period of growth, then begin to decline between 2010 and 2025 to the end of the forecast period: general internal medicine, general/family medicine, obstetrics and gynecology, otolaryngology, other surgical subspecialties, and other specialties. Finally, there were a number of specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, psychiatry, and urology.

Primary Care Specialties

General/Family Medicine

General/family physicians were forecast to increase by 6.8 percent between 2006 and 2030, which is below the overall predicted rate of growth among primary care physicians, with the number of active general/family physicians predicted to increase from 5,108 in 2006 to 5,628 in 2020, then decline to 5,456 in 2030. Adjusting for the projected population growth in the state, the general/family physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 28.3 physicians per 100,000 population in 2020, then decline to 27.2 physicians per 100,000 population in 2030.

General Internal Medicine

General internists were forecast to grow by 12.4 percent between 2006 and 2030, slightly below the overall predicted rate of growth among primary care physicians, with the number of active general internists predicted to increase from 14,242 in 2006 to 16,093 in 2025, then decline to 16,009 in 2030. Adjusting for the projected population growth in the state, the general internist to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 80.9 physicians per 100,000 population in 2020, then decline to 79.9 physicians per 100,000 population in 2030.

General Pediatrics

General pediatricians were forecast to grow by 20.7 percent between 2006 and 2030, well above the overall predicted rate of growth among primary care physicians, with the number of active general pediatricians predicted to increase from 5,939 in 2006 to 7,167 in 2030. Adjusting for the projected population growth in the state, the general pediatrician to population ratio was predicted to increase from 30.8 physicians per 100,000 population in 2006 to 35.8 physicians per 100,000 population in 2030.

Figure 17 – New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	26,943	138.5	2010	5,361	27.6
2015	27,939	142.1	2015	5,563	28.3
2020	28,490	143.5	2020	5,628	28.3
2025	28,660	143.4	2025	5,582	27.9
2030	28,632	143.0	2030	5,456	27.2
Percent change 2006-2030	13.2%	9.0%	Percent change 2006-2030	6.8%	2.9%
Annualized change 2006-2030	0.52%	0.36%	Annualized change 2006-2030	0.28%	0.12%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	15,282	78.6	2010	6,301	32.4
2015	15,795	80.3	2015	6,581	33.5
2020	16,055	80.9	2020	6,807	34.3
2025	16,093	80.5	2025	6,985	35.0
2030	16,009	79.9	2030	7,167	35.8
Percent change 2006-2030	12.4%	8.3%	Percent change 2006-2030	20.7%	16.2%
Annualized change 2006-2030	0.49%	0.33%	Annualized change 2006-2030	0.79%	0.63%

Non-Primary Care Specialties

Cardiovascular Disease

Cardiologists were forecast to grow by 36.3 percent between 2006 and 2030, far greater than the overall predicted growth among non-primary care physicians, with the number of active cardiologists predicted to increase from 2,335 in 2006 to 3,183 in 2030. Adjusting for the projected population growth in the state, the cardiologist to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 15.9 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

Other internal medicine subspecialists were forecast to grow by 49.5 percent between 2006 and 2030, far greater than the overall predicted rate of growth among non-primary care physicians, with the number of active physicians predicted to increase from 8,974 in 2006 to 13,414 in 2030. Adjusting for the projected population growth in the state, the other internal medicine subspecialist to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 67.0 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

Obstetricians and gynecologists were forecast to grow by 9.4 percent between 2006 and 2030, well below the overall predicted rate of growth among non-primary care physicians, with the number of active obstetricians and gynecologists predicted to increase from 3,832 in 2006 to 4,198 in 2025, then decline to 4,191 in 2030. Adjusting for the projected population growth in the state, the obstetrician and gynecologist to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 21.1 physicians per 100,000 population in 2020, then decline to 20.9 physicians per 100,000 population in 2030.

Pathology

Pathologists were forecast to decline by 22.0 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active pathologists predicted to decrease from 1,716 in 2006 to 1,339 in 2030. Adjusting for the projected population growth in the state, the pathologist to population ratio was predicted to decrease from 8.9 physicians per 100,000 population in 2006 to 6.7 physicians per 100,000 population in 2030.

Figure 18 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,474	12.7	2010	9,738	50.1
2015	2,694	13.7	2015	10,833	55.1
2020	2,878	14.5	2020	11,809	59.5
2025	3,028	15.2	2025	12,632	63.2
2030	3,183	15.9	2030	13,414	67.0
Percent change 2006-2030	36.3%	31.3%	Percent change 2006-2030	49.5%	44.0%
Annualized change 2006-2030	1.30%	1.14%	Annualized change 2006-2030	1.69%	1.53%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,988	20.5	2010	1,655	8.5
2015	4,121	21.0	2015	1,581	8.0
2020	4,185	21.1	2020	1,506	7.6
2025	4,198	21.0	2025	1,424	7.1
2030	4,191	20.9	2030	1,339	6.7
Percent change 2006-2030	9.4%	5.3%	Percent change 2006-2030	-22.0%	-24.9%
Annualized change 2006-2030	0.37%	0.22%	Annualized change 2006-2030	-1.03%	-1.18%

Psychiatry

Psychiatrists were forecast to decline by 11.6 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active psychiatrists predicted to decrease from 6,166 in 2006 to 5,452 in 2030. Adjusting for the projected population growth in the state, the psychiatrist to population ratio was predicted to decrease from 32.0 physicians per 100,000 population in 2006 to 27.2 physicians per 100,000 population in 2030.

Anesthesiology

Anesthesiologists were forecast to grow by 15.1 percent between 2006 and 2030, slightly below the overall predicted growth among non-primary care physicians, with the number of active anesthesiologists predicted to increase from 3,695 in 2006 to 4,252 in 2030. Adjusting for the projected population growth in the state, the anesthesiologist to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 21.2 physicians per 100,000 population in 2030.

Radiology

Radiologists were forecast to grow by 23.8 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active radiologists predicted to increase from 3,548 in 2006 to 4,393 in 2030. Adjusting for the projected population growth in the state, the radiologist to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 21.9 physicians per 100,000 population in 2030.

Emergency Medicine

Emergency medicine physicians were forecast to grow by 63.7 percent between 2006 and 2030, far above the overall predicted growth among non-primary care physicians, with the number of active emergency medicine physicians predicted to increase from 2,712 in 2006 to 4,438 in 2030. Adjusting for the projected population growth in the state, the emergency medicine physician to population ratio was predicted to increase from 14.1 physicians per 100,000 population in 2006 to 22.2 physicians per 100,000 population in 2030.

Figure 19 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,154	31.6	2010	3,873	19.9
2015	6,096	31.0	2015	3,929	20.0
2020	5,886	29.6	2020	4,101	20.7
2025	5,649	28.3	2025	4,207	21.1
2030	5,452	27.2	2030	4,252	21.2
Percent change 2006-2030	-11.6%	-14.8%	Percent change 2006-2030	15.1%	10.8%
Annualized change 2006-2030	-0.51%	-0.67%	Annualized change 2006-2030	0.59%	0.43%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,835	19.7	2010	3,021	15.5
2015	4,056	20.6	2015	3,440	17.5
2020	4,197	21.1	2020	3,819	19.2
2025	4,303	21.5	2025	4,154	20.8
2030	4,393	21.9	2030	4,438	22.2
Percent change 2006-2030	23.8%	19.2%	Percent change 2006-2030	63.7%	57.6%
Annualized change 2006-2030	0.89%	0.74%	Annualized change 2006-2030	2.07%	1.91%

General Surgery

General surgeons were forecast to grow by 22.0 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active general surgeons predicted to increase from 2,683 in 2006 to 3,274 in 2030. Adjusting for the projected population growth in the state, the general surgeons to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 16.3 physicians per 100,000 population in 2030.

Ophthalmology

Ophthalmologists were forecast to decline by 15.6 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active ophthalmologists predicted to decrease from 1,974 in 2006 to 1,666 in 2030. Adjusting for the projected population growth in the state, the ophthalmologist to population ratio was predicted to decrease from 10.2 physicians per 100,000 population in 2006 to 8.3 physicians per 100,000 population in 2030.

Otolaryngology

Otolaryngologists were forecast to decline by 2.2 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active otolaryngologists predicted to increase from 828 in 2006 to 851 in 2015, then decline to 810 in 2030. Adjusting for the projected population growth in the state, the otolaryngologist to population ratio was predicted to remain at 4.3 physicians per 100,000 population until 2015, then decline to 4.0 physicians per 100,000 population in 2030.

Orthopedic Surgery

Orthopedic surgeons were forecast to grow by 14.9 percent between 2006 and 2030, somewhat below the overall predicted growth among non-primary care physicians, with the number of active orthopedic surgeons predicted to increase from 1,931 in 2006 to 2,219 in 2030. Adjusting for the projected population growth in the state, the orthopedic surgeon to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 11.1 physicians per 100,000 population in 2030.

Figure 20 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

General Surgery			Ophthalmology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,851	14.7	2010	1,945	10.0
2015	3,010	15.3	2015	1,887	9.6
2020	3,102	15.6	2020	1,820	9.2
2025	3,195	16.0	2025	1,734	8.7
2030	3,274	16.3	2030	1,666	8.3
Percent change 2006-2030	22.0%	17.5%	Percent change 2006-2030	-15.6%	-18.7%
Annualized change 2006-2030	0.83%	0.68%	Annualized change 2006-2030	-0.70%	-0.86%

Otolaryngology			Orthopedic Surgery		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	839	4.3	2010	2,021	10.4
2015	851	4.3	2015	2,084	10.6
2020	839	4.2	2020	2,138	10.8
2025	833	4.2	2025	2,177	10.9
2030	810	4.0	2030	2,219	11.1
Percent change 2006-2030	-2.2%	-5.8%	Percent change 2006-2030	14.9%	10.6%
Annualized change 2006-2030	-0.09%	-0.25%	Annualized change 2006-2030	0.58%	0.42%

Urology

Urologists were forecast to decline by 15.4 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active urologists predicted to decrease from 937 in 2006 to 792 in 2030. Adjusting for the projected population growth in the state, the urologist to population ratio was predicted to decline from 4.9 physicians per 100,000 population in 2006 to 4.0 physicians per 100,000 population in 2030.

Other Surgery Subspecialties

Other surgical subspecialists were forecast to decline by 9.6 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase from 1,399 in 2006 to 1,401 in 2010, then decline to 1,265 in 2030. Adjusting for the projected population growth in the state, the other surgical subspecialist to population ratio was predicted to decrease from 7.3 physicians per 100,000 population in 2006 to 6.3 physicians per 100,000 population in 2030.

Other Specialties

Other specialists were forecast to grow by 8.0 percent between 2006 and 2030, well below the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase from 7,470 in 2006 to 8,091 in 2020, then decline slightly to 8,066 in 2030. Adjusting for the projected population growth in the state, the other specialist to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 40.8 physicians per 100,000 population in 2020, then decline to 40.3 physicians per 100,000 population in 2030.

Figure 21 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	922	4.7	2010	1,401	7.2
2015	889	4.5	2015	1,380	7.0
2020	852	4.3	2020	1,355	6.8
2025	822	4.1	2025	1,313	6.6
2030	792	4.0	2030	1,265	6.3
Percent change 2006-2030	-15.4%	-18.6%	Percent change 2006-2030	-9.6%	-12.9%
Annualized change 2006-2030	-0.70%	-0.85%	Annualized change 2006-2030	-0.42%	-0.58%

Other Specialties		
Year	Physicians	Physicians per 100,000 Population
2006	7,470	38.7
2010	7,811	40.2
2015	8,030	40.8
2020	8,091	40.8
2025	8,078	40.4
2030	8,066	40.3
Percent change 2006-2030	8.0%	4.0%
Annualized change 2006-2030	0.32%	0.16%

State Level Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care)

The supply model forecast a 12.5 percent increase in the supply of physicians between 2006 and 2030, with the number of active physicians predicted to increase from 75,489 in 2006 to 84,942 in 2030. Adjusting for the projected population growth in the state (3.8 percent), the physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 424.1 physicians per 100,000 population in 2030.

Figure 22 – New York Physician Supply Forecast, 2006-2030

Year	Physicians	Physicians per 100,000 Population
2006	75,489	391.3
2010	78,436	403.2
2015	81,446	414.2
2020	83,391	420.0
2025	84,441	422.6
2030	84,942	424.1
Percent change 2006-2030	12.5%	8.4%
Annualized change 2006-2030	0.49%	0.34%

Primary care physicians were forecast to grow by 7.4 percent between 2006 and 2030, with the number of active physicians predicted to increase from 25,289 in 2006 to 27,506 in 2020, then decline to 27,155 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to increase from 131.1 physicians per 100,000 population in 2006 to 138.5 physicians per 100,000 population in 2020, then decline to 135.6 physicians per 100,000 population in 2030.

Non-primary care physicians were also forecast to grow by 15.1 percent between 2006 and 2030, with the number of active physicians predicted to increase from 50,200 in 2006 to 57,787 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 288.5 physicians per 100,000 population in 2030.

Figure 23 – New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	26,421	135.8	2010	52,015	267.4
2015	27,173	138.2	2015	54,273	276.0
2020	27,506	138.5	2020	55,885	281.5
2025	27,466	137.5	2025	56,975	285.1
2030	27,155	135.6	2030	57,787	288.5
Percent change 2006-2030	7.4%	3.4%	Percent change 2006-2030	15.1%	10.9%
Annualized change 2006-2030	0.30%	0.14%	Annualized change 2006-2030	0.59%	0.43%

Specialty-Specific Supply Forecasts

The supply model forecasts for 18 specialty groups through 2030 in New York. In most cases in this scenario, the supply of physicians was forecast to grow between 2006 and 2030. Specialty-specific supply forecasts fell into three patterns. A number of specialties were projected to experience growth over the entire forecast period: anesthesiology, cardiovascular disease, emergency medicine, general pediatrics, general surgery, orthopedic

surgery, radiology, and other internal medicine subspecialties. A number of specialties were projected to experience a period of growth, then begin to decline between 2015 and 2025 to the end of the forecast period: general internal medicine, general/family medicine, obstetrics and gynecology, otolaryngology, and other specialties. Finally, there were a number of specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, psychiatry, urology, and other surgical subspecialties.

Primary Care Specialties

General/Family Medicine

General/family physicians were forecast to increase by 1.3 percent between 2006 and 2030, well below the overall predicted rate of growth among primary care physicians, with the number of active general/family physicians predicted to increase from 5,108 in 2006 to 5,434 in 2020, then decline to 5,175 in 2030. Adjusting for the projected population growth in the state, the general/family physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 27.5 physicians per 100,000 population in 2015, then decline to 25.8 physicians per 100,000 population in 2030.

General Internal Medicine

General internists were forecast to grow by 6.6 percent between 2006 and 2030, slightly below the overall predicted rate of growth among primary care physicians, with the number of active general internists predicted to increase from 14,242 in 2006 to 15,501 in 2020, then decline to 15,183 in 2030. Adjusting for the projected population growth in the state, the general internist to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 78.1 physicians per 100,000 population in 2020, then decline to 75.8 physicians per 100,000 population in 2030.

General Pediatrics

General pediatricians were forecast to grow by 14.5 percent between 2006 and 2030, well above the overall predicted rate of growth among primary care physicians, with the number of active general pediatricians predicted to increase from 5,939 in 2006 to 6,797 in 2030. Adjusting for the projected population growth in the state, the general pediatrician to population ratio was predicted to increase from 30.8 physicians per 100,000 population in 2006 to 33.9 physicians per 100,000 population in 2030.

Figure 24 – New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	26,421	135.8	2010	5,257	27.0
2015	27,173	138.2	2015	5,410	27.5
2020	27,506	138.5	2020	5,434	27.4
2025	27,466	137.5	2025	5,350	26.8
2030	27,155	135.6	2030	5,175	25.8
Percent change 2006-2030	7.4%	3.4%	Percent change 2006-2030	1.3%	-2.4%
Annualized change 2006-2030	0.30%	0.14%	Annualized change 2006-2030	0.05%	-0.10%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,986	77.0	2010	6,179	31.8
2015	15,362	78.1	2015	6,400	32.5
2020	15,501	78.1	2020	6,570	33.1
2025	15,423	77.2	2025	6,694	33.5
2030	15,183	75.8	2030	6,797	33.9
Percent change 2006-2030	6.6%	2.7%	Percent change 2006-2030	14.5%	10.2%
Annualized change 2006-2030	0.27%	0.11%	Annualized change 2006-2030	0.56%	0.41%

Non-Primary Care Specialties

Cardiovascular Disease

Cardiologists were forecast to grow by 34.1 percent between 2006 and 2030, far greater than the overall predicted growth among non-primary care physicians, with the number of active cardiologists predicted to increase from 2,335 in 2006 to 3,131 in 2030. Adjusting for the projected population growth in the state, the cardiologist to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 15.6 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

Other internal medicine subspecialists were forecast to grow by 47.0 percent between 2006 and 2030, far greater than the overall predicted rate of growth among non-primary care physicians, with the number of active physicians predicted to increase from 8,974 in 2006 to 13,194 in 2030. Adjusting for the projected population growth in the state, the other internal medicine subspecialist to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 65.9 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

Obstetricians and gynecologists were forecast to grow by 7.6 percent between 2006 and 2030, well below the overall predicted rate of growth among non-primary care physicians, with the number of active obstetricians and gynecologists predicted to increase from 3,832 in 2006 to 4,142 in 2025, then decline to 4,122 in 2030. Adjusting for the projected population growth in the state, the obstetrician and gynecologist to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 20.8 physicians per 100,000 population in 2020, then decline to 20.6 physicians per 100,000 population in 2030.

Pathology

Pathologists were forecast to decline by 23.3 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active pathologists predicted to decrease from 1,716 in 2006 to 1,317 in 2030. Adjusting for the projected population growth in the state, the pathologist to population ratio was predicted to decrease from 8.9 physicians per 100,000 population in 2006 to 6.6 physicians per 100,000 population in 2030.

Figure 25 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,450	12.6	2010	9,643	49.6
2015	2,664	13.5	2015	10,713	54.5
2020	2,843	14.3	2020	11,664	58.7
2025	2,988	15.0	2025	12,463	62.4
2030	3,131	15.6	2030	13,194	65.9
Percent change 2006-2030	34.1%	29.1%	Percent change 2006-2030	47.0%	41.6%
Annualized change 2006-2030	1.23%	1.07%	Annualized change 2006-2030	1.62%	1.46%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,949	20.3	2010	1,639	8.4
2015	4,076	20.7	2015	1,564	8.0
2020	4,133	20.8	2020	1,487	7.5
2025	4,142	20.7	2025	1,405	7.0
2030	4,122	20.6	2030	1,317	6.6
Percent change 2006-2030	7.6%	3.6%	Percent change 2006-2030	-23.3%	-26.1%
Annualized change 2006-2030	0.30%	0.15%	Annualized change 2006-2030	-1.10%	-1.25%

Psychiatry

Psychiatrists were forecast to decline by 13.0 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active psychiatrists predicted to decrease from 6,166 in 2006 to 5,362 in 2030. Adjusting for the projected population growth in the state, the psychiatrist to population ratio was predicted to decrease from 32.0 physicians per 100,000 population in 2006 to 26.8 physicians per 100,000 population in 2030.

Anesthesiology

Anesthesiologists were forecast to grow by 13.2 percent between 2006 and 2030, slightly below the overall predicted growth among non-primary care physicians, with the number of active anesthesiologists predicted to increase from 3,695 in 2006 to 4,182 in 2030. Adjusting for the projected population growth in the state, the anesthesiologist to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 20.9 physicians per 100,000 population in 2030.

Radiology

Radiologists were forecast to grow by 21.8 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active radiologists predicted to increase from 3,548 in 2006 to 4,320 in 2030. Adjusting for the projected population growth in the state, the radiologist to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 21.6 physicians per 100,000 population in 2030.

Emergency Medicine

Emergency medicine physicians were forecast to grow by 61.0 percent between 2006 and 2030, far above the overall predicted growth among non-primary care physicians, with the number of active emergency medicine physicians predicted to increase from 2,712 in 2006 to 4,365 in 2030. Adjusting for the projected population growth in the state, the emergency medicine physician to population ratio was predicted to increase from 14.1 physicians per 100,000 population in 2006 to 21.8 physicians per 100,000 population in 2030.

Figure 26 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,094	31.3	2010	3,835	19.7
2015	6,029	30.7	2015	3,885	19.8
2020	5,814	29.3	2020	4,051	20.4
2025	5,574	27.9	2025	4,151	20.8
2030	5,362	26.8	2030	4,182	20.9
Percent change 2006-2030	-13.0%	-16.2%	Percent change 2006-2030	13.2%	9.0%
Annualized change 2006-2030	-0.58%	-0.74%	Annualized change 2006-2030	0.52%	0.36%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,798	19.5	2010	2,991	15.4
2015	4,011	20.4	2015	3,402	17.3
2020	4,146	20.9	2020	3,772	19.0
2025	4,245	21.2	2025	4,098	20.5
2030	4,320	21.6	2030	4,365	21.8
Percent change 2006-2030	21.8%	17.3%	Percent change 2006-2030	61.0%	55.0%
Annualized change 2006-2030	0.82%	0.67%	Annualized change 2006-2030	2.00%	1.84%

General Surgery

General surgeons were forecast to grow by 20.0 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active general surgeons predicted to increase from 2,683 in 2006 to 3,221 in 2030. Adjusting for the projected population growth in the state, the general surgeons to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 16.1 physicians per 100,000 population in 2030.

Ophthalmology

Ophthalmologists were forecast to decline by 17.0 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active ophthalmologists predicted to decrease from 1,974 in 2006 to 1,638 in 2030. Adjusting for the projected population growth in the state, the ophthalmologist to population ratio was predicted to decrease from 10.2 physicians per 100,000 population in 2006 to 8.2 physicians per 100,000 population in 2030.

Otolaryngology

Otolaryngologists were forecast to decline by 3.8 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active otolaryngologists predicted to increase from 828 in 2006 to 841 in 2015, then decline to 796 in 2030. Adjusting for the projected population growth in the state, the otolaryngologist to population ratio was predicted to remain at 4.3 physicians per 100,000 population until 2015, then decline to 4.0 physicians per 100,000 population in 2030.

Orthopedic Surgery

Orthopedic surgeons were forecast to grow by 13.0 percent between 2006 and 2030, somewhat below the overall predicted growth among non-primary care physicians, with the number of active orthopedic surgeons predicted to increase from 1,931 in 2006 to 2,182 in 2030. Adjusting for the projected population growth in the state, the orthopedic surgeon to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 10.9 physicians per 100,000 population in 2030.

Figure 27 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

General Surgery			Ophthalmology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,824	14.5	2010	1,926	9.9
2015	2,977	15.1	2015	1,866	9.5
2020	3,064	15.4	2020	1,798	9.1
2025	3,152	15.8	2025	1,711	8.6
2030	3,221	16.1	2030	1,638	8.2
Percent change 2006-2030	20.0%	15.6%	Percent change 2006-2030	-17.0%	-20.1%
Annualized change 2006-2030	0.76%	0.61%	Annualized change 2006-2030	-0.77%	-0.93%

Otolaryngology			Orthopedic Surgery		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	830	4.3	2010	2,001	10.3
2015	841	4.3	2015	2,061	10.5
2020	829	4.2	2020	2,111	10.6
2025	822	4.1	2025	2,148	10.7
2030	796	4.0	2030	2,182	10.9
Percent change 2006-2030	-3.8%	-7.4%	Percent change 2006-2030	13.0%	8.8%
Annualized change 2006-2030	-0.16%	-0.32%	Annualized change 2006-2030	0.51%	0.35%

Urology

Urologists were forecast to decline by 16.8 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active urologists predicted to decrease from 937 in 2006 to 779 in 2030. Adjusting for the projected population growth in the state, the urologist to population ratio was predicted to decline from 4.9 physicians per 100,000 population in 2006 to 3.9 physicians per 100,000 population in 2030.

Other Surgery Subspecialties

Other surgical subspecialists were forecast to decline by 11.1 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to decrease from 1,399 in 2006 to 1,244 in 2030. Adjusting for the projected population growth in the state, the other surgical subspecialist to population ratio was predicted to decrease from 7.3 physicians per 100,000 population in 2006 to 6.2 physicians per 100,000 population in 2030.

Other Specialties

Other specialists were forecast to grow by 8.0 percent between 2006 and 2030, well below the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase from 7,470 in 2006 to 7,992 in 2020, then decline to 7,933 in 2030. Adjusting for the projected population growth in the state, the other specialist to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 40.4 physicians per 100,000 population in 2015, then decline to 39.6 physicians per 100,000 population in 2030.

Figure 28 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	913	4.7	2010	1,387	7.1
2015	880	4.5	2015	1,364	6.9
2020	841	4.2	2020	1,338	6.7
2025	811	4.1	2025	1,296	6.5
2030	779	3.9	2030	1,244	6.2
Percent change 2006-2030	-16.8%	-19.9%	Percent change 2006-2030	-11.1%	-14.4%
Annualized change 2006-2030	-0.77%	-0.92%	Annualized change 2006-2030	-0.49%	-0.64%

Other Specialties		
Year	Physicians	Physicians per 100,000 Population
2006	7,470	38.7
2010	7,734	39.8
2015	7,941	40.4
2020	7,992	40.3
2025	7,970	39.9
2030	7,933	39.6
Percent change 2006-2030	6.2%	2.3%
Annualized change 2006-2030	0.25%	0.09%

State Level Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care)

The supply model forecast a 12.5 percent increase in the supply of physicians between 2006 and 2030, with the number of active physicians predicted to increase from 75,489 in 2006 to 84,942 in 2030. Adjusting for the projected population growth in the state (3.8 percent), the physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 424.1 physicians per 100,000 population in 2030.

Figure 29 – New York Physician Supply Forecast, 2006-2030

Year	Physicians	Physicians per 100,000 Population
2006	75,489	391.3
2010	78,436	403.2
2015	81,446	414.2
2020	83,391	420.0
2025	84,441	422.6
2030	84,942	424.1
Percent change 2006-2030	12.5%	8.4%
Annualized change 2006-2030	0.49%	0.34%

Primary care physicians were forecast to grow by 6.7 percent between 2006 and 2030, with the number of active physicians predicted to increase from 25,289 in 2006 to 27,415 in 2020, then decline to 26,989 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to increase from 131.1 physicians per 100,000 population in 2006 to 138.1 physicians per 100,000 population in 2020, then decline to 134.8 physicians per 100,000 population in 2030.

Non-primary care physicians were also forecast to grow by 15.4 percent between 2006 and 2030, with the number of active physicians predicted to increase from 50,200 in 2006 to 57,953 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 289.3 physicians per 100,000 population in 2030.

Figure 30 – New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	26,413	135.8	2010	52,023	267.4
2015	27,123	137.9	2015	54,323	276.2
2020	27,415	138.1	2020	55,976	281.9
2025	27,333	136.8	2025	57,108	285.8
2030	26,989	134.8	2030	57,953	289.3
Percent change 2006-2030	6.7%	2.8%	Percent change 2006-2030	15.4%	11.2%
Annualized change 2006-2030	0.27%	0.11%	Annualized change 2006-2030	0.60%	0.44%

Specialty-Specific Supply Forecasts

The supply model forecasts for 18 specialty groups through 2030 in New York. In most cases in this scenario, the supply of physicians was forecast to grow between 2006 and 2030. Specialty-specific supply forecasts fell into three patterns. A number of specialties were projected to experience growth over the entire forecast period: anesthesiology, cardiovascular disease, emergency medicine, general pediatrics, general surgery, orthopedic

surgery, radiology, and other internal medicine subspecialties. A number of specialties were projected to experience a period of growth, then begin to decline between 2015 and 2025 to the end of the forecast period: general internal medicine, general/family medicine, obstetrics and gynecology, otolaryngology, and other specialties. Finally, there were a number of specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, psychiatry, urology, and other surgical subspecialties.

Primary Care Specialties

General/Family Medicine

General/family physicians were forecast to increase by 0.7 percent between 2006 and 2030, well below the overall predicted rate of growth among primary care physicians, with the number of active general/family physicians predicted to increase from 5,108 in 2006 to 5,416 in 2020, then decline to 5,143 in 2030. Adjusting for the projected population growth in the state, the general/family physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 27.5 physicians per 100,000 population in 2015, then decline to 25.7 physicians per 100,000 population in 2030.

General Internal Medicine

General internists were forecast to grow by 6.0 percent between 2006 and 2030, slightly below the overall predicted rate of growth among primary care physicians, with the number of active general internists predicted to increase from 14,242 in 2006 to 15,450 in 2020, then decline to 15,090 in 2030. Adjusting for the projected population growth in the state, the general internist to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 78.0 physicians per 100,000 population in 2020, then decline to 75.3 physicians per 100,000 population in 2030.

General Pediatrics

General pediatricians were forecast to grow by 13.8 percent between 2006 and 2030, well above the overall predicted rate of growth among primary care physicians, with the number of active general pediatricians predicted to increase from 5,939 in 2006 to 6,756 in 2030. Adjusting for the projected population growth in the state, the general pediatrician to population ratio was predicted to increase from 30.8 physicians per 100,000 population in 2006 to 33.7 physicians per 100,000 population in 2030.

Figure 31 – New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	26,413	135.8	2010	5,255	27.0
2015	27,123	137.9	2015	5,400	27.5
2020	27,415	138.1	2020	5,416	27.3
2025	27,333	136.8	2025	5,324	26.6
2030	26,989	134.8	2030	5,143	25.7
Percent change 2006-2030	6.7%	2.8%	Percent change 2006-2030	0.7%	-3.0%
Annualized change 2006-2030	0.27%	0.11%	Annualized change 2006-2030	0.03%	-0.13%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,981	77.0	2010	6,177	31.8
2015	15,334	78.0	2015	6,389	32.5
2020	15,450	77.8	2020	6,549	33.0
2025	15,348	76.8	2025	6,661	33.3
2030	15,090	75.3	2030	6,756	33.7
Percent change 2006-2030	6.0%	2.0%	Percent change 2006-2030	13.8%	9.6%
Annualized change 2006-2030	0.24%	0.08%	Annualized change 2006-2030	0.54%	0.38%

Non-Primary Care Specialties

Cardiovascular Disease

Cardiologists were forecast to grow by 34.5 percent between 2006 and 2030, far greater than the overall predicted growth among non-primary care physicians, with the number of active cardiologists predicted to increase from 2,335 in 2006 to 3,140 in 2030. Adjusting for the projected population growth in the state, the cardiologist to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 15.7 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

Other internal medicine subspecialists were forecast to grow by 47.4 percent between 2006 and 2030, far greater than the overall predicted rate of growth among non-primary care physicians, with the number of active physicians predicted to increase from 8,974 in 2006 to 13,231 in 2030. Adjusting for the projected population growth in the state, the other internal medicine subspecialist to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 66.1 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

Obstetricians and gynecologists were forecast to grow by 7.9 percent between 2006 and 2030, well below the overall predicted rate of growth among non-primary care physicians, with the number of active obstetricians and gynecologists predicted to increase from 3,832 in 2006 to 4,152 in 2025, then decline to 4,134 in 2030. Adjusting for the projected population growth in the state, the obstetrician and gynecologist to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 20.9 physicians per 100,000 population in 2020, then decline to 20.6 physicians per 100,000 population in 2030.

Pathology

Pathologists were forecast to decline by 23.1 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active pathologists predicted to decrease from 1,716 in 2006 to 1,320 in 2030. Adjusting for the projected population growth in the state, the pathologist to population ratio was predicted to decrease from 8.9 physicians per 100,000 population in 2006 to 6.6 physicians per 100,000 population in 2030.

Figure 32 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,450	12.6	2010	9,644	49.6
2015	2,666	13.6	2015	10,723	54.5
2020	2,848	14.3	2020	11,684	58.8
2025	2,995	15.0	2025	12,492	62.5
2030	3,140	15.7	2030	13,231	66.1
Percent change 2006-2030	34.5%	29.5%	Percent change 2006-2030	47.4%	42.0%
Annualized change 2006-2030	1.24%	1.08%	Annualized change 2006-2030	1.63%	1.47%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,950	20.3	2010	1,639	8.4
2015	4,079	20.7	2015	1,565	8.0
2020	4,140	20.9	2020	1,490	7.5
2025	4,152	20.8	2025	1,408	7.0
2030	4,134	20.6	2030	1,320	6.6
Percent change 2006-2030	7.9%	3.9%	Percent change 2006-2030	-23.1%	-25.9%
Annualized change 2006-2030	0.32%	0.16%	Annualized change 2006-2030	-1.09%	-1.24%

Psychiatry

Psychiatrists were forecast to decline by 12.8 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active psychiatrists predicted to decrease from 6,166 in 2006 to 5,377 in 2030. Adjusting for the projected population growth in the state, the psychiatrist to population ratio was predicted to decrease from 32.0 physicians per 100,000 population in 2006 to 26.8 physicians per 100,000 population in 2030.

Anesthesiology

Anesthesiologists were forecast to grow by 13.5 percent between 2006 and 2030, slightly below the overall predicted growth among non-primary care physicians, with the number of active anesthesiologists predicted to increase from 3,695 in 2006 to 4,194 in 2030. Adjusting for the projected population growth in the state, the anesthesiologist to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 20.9 physicians per 100,000 population in 2030.

Radiology

Radiologists were forecast to grow by 22.1 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active radiologists predicted to increase from 3,548 in 2006 to 4,333 in 2030. Adjusting for the projected population growth in the state, the radiologist to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 21.6 physicians per 100,000 population in 2030.

Emergency Medicine

Emergency medicine physicians were forecast to grow by 61.4 percent between 2006 and 2030, far above the overall predicted growth among non-primary care physicians, with the number of active emergency medicine physicians predicted to increase from 2,712 in 2006 to 4,378 in 2030. Adjusting for the projected population growth in the state, the emergency medicine physician to population ratio was predicted to increase from 14.1 physicians per 100,000 population in 2006 to 21.9 physicians per 100,000 population in 2030.

Figure 33 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,095	31.3	2010	3,836	19.7
2015	6,034	30.7	2015	3,889	19.8
2020	5,823	29.3	2020	4,058	20.4
2025	5,587	28.0	2025	4,160	20.8
2030	5,377	26.8	2030	4,194	20.9
Percent change 2006-2030	-12.8%	-16.0%	Percent change 2006-2030	13.5%	9.3%
Annualized change 2006-2030	-0.57%	-0.72%	Annualized change 2006-2030	0.53%	0.37%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,798	19.5	2010	2,992	15.4
2015	4,015	20.4	2015	3,405	17.3
2020	4,153	20.9	2020	3,778	19.0
2025	4,255	21.3	2025	4,108	20.6
2030	4,333	21.6	2030	4,378	21.9
Percent change 2006-2030	22.1%	17.6%	Percent change 2006-2030	61.4%	55.5%
Annualized change 2006-2030	0.84%	0.68%	Annualized change 2006-2030	2.02%	1.86%

General Surgery

General surgeons were forecast to grow by 20.4 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active general surgeons predicted to increase from 2,683 in 2006 to 3,230 in 2030. Adjusting for the projected population growth in the state, the general surgeons to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 16.1 physicians per 100,000 population in 2030.

Ophthalmology

Ophthalmologists were forecast to decline by 16.8 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active ophthalmologists predicted to decrease from 1,974 in 2006 to 1,643 in 2030. Adjusting for the projected population growth in the state, the ophthalmologist to population ratio was predicted to decrease from 10.2 physicians per 100,000 population in 2006 to 8.2 physicians per 100,000 population in 2030.

Otolaryngology

Otolaryngologists were forecast to decline by 3.5 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active otolaryngologists predicted to increase from 828 in 2006 to 842 in 2015, then decline to 799 in 2030. Adjusting for the projected population growth in the state, the otolaryngologist to population ratio was predicted to remain at 4.3 physicians per 100,000 population until 2015, then decline to 4.0 physicians per 100,000 population in 2030.

Orthopedic Surgery

Orthopedic surgeons were forecast to grow by 13.3 percent between 2006 and 2030, somewhat below the overall predicted growth among non-primary care physicians, with the number of active orthopedic surgeons predicted to increase from 1,931 in 2006 to 2,188 in 2030. Adjusting for the projected population growth in the state, the orthopedic surgeon to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 10.9 physicians per 100,000 population in 2030.

Figure 34 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

General Surgery			Ophthalmology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,824	14.5	2010	1,926	9.9
2015	2,980	15.2	2015	1,867	9.5
2020	3,069	15.5	2020	1,800	9.1
2025	3,159	15.8	2025	1,715	8.6
2030	3,230	16.1	2030	1,643	8.2
Percent change 2006-2030	20.4%	15.9%	Percent change 2006-2030	-16.8%	-19.8%
Annualized change 2006-2030	0.78%	0.62%	Annualized change 2006-2030	-0.76%	-0.92%

Otolaryngology			Orthopedic Surgery		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	831	4.3	2010	2,002	10.3
2015	842	4.3	2015	2,063	10.5
2020	830	4.2	2020	2,115	10.7
2025	824	4.1	2025	2,153	10.8
2030	799	4.0	2030	2,188	10.9
Percent change 2006-2030	-3.5%	-7.1%	Percent change 2006-2030	13.3%	9.1%
Annualized change 2006-2030	-0.15%	-0.31%	Annualized change 2006-2030	0.52%	0.37%

Urology

Urologists were forecast to decline by 16.6 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active urologists predicted to decrease from 937 in 2006 to 781 in 2030. Adjusting for the projected population growth in the state, the urologist to population ratio was predicted to decline from 4.9 physicians per 100,000 population in 2006 to 3.9 physicians per 100,000 population in 2030.

Other Surgery Subspecialties

Other surgical subspecialists were forecast to decline by 10.8 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to decrease from 1,399 in 2006 to 1,247 in 2030. Adjusting for the projected population growth in the state, the other surgical subspecialist to population ratio was predicted to decrease from 7.3 physicians per 100,000 population in 2006 to 6.2 physicians per 100,000 population in 2030.

Other Specialties

Other specialists were forecast to grow by 6.5 percent between 2006 and 2030, well below the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase from 7,470 in 2006 to 8,005 in 2020, then decline to 7,956 in 2030. Adjusting for the projected population growth in the state, the other specialist to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 40.4 physicians per 100,000 population in 2015, then decline to 39.7 physicians per 100,000 population in 2030.

Figure 35 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	914	4.7	2010	1,388	7.1
2015	880	4.5	2015	1,366	6.9
2020	843	4.2	2020	1,341	6.8
2025	813	4.1	2025	1,299	6.5
2030	781	3.9	2030	1,247	6.2
Percent change 2006-2030	-16.6%	-19.7%	Percent change 2006-2030	-10.8%	-14.1%
Annualized change 2006-2030	-0.75%	-0.91%	Annualized change 2006-2030	-0.48%	-0.63%

Other Specialties		
Year	Physicians	Physicians per 100,000 Population
2006	7,470	38.7
2010	7,736	39.8
2015	7,948	40.4
2020	8,005	40.3
2025	7,989	40.0
2030	7,956	39.7
Percent change 2006-2030	6.5%	2.6%
Annualized change 2006-2030	0.26%	0.11%

State Level Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care)

The supply model forecast a 12.5 percent increase in the supply of physicians between 2006 and 2030, with the number of active physicians predicted to increase from 75,489 in 2006 to 84,942 in 2030. Adjusting for the projected population growth in the state (3.8 percent), the physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 424.1 physicians per 100,000 population in 2030.

Figure 36 – New York Physician Supply Forecast, 2006-2030

Year	Physicians	Physicians per 100,000 Population
2006	75,489	391.3
2010	78,436	403.2
2015	81,446	414.2
2020	83,391	420.0
2025	84,441	422.6
2030	84,942	424.1
Percent change 2006-2030	12.5%	8.4%
Annualized change 2006-2030	0.49%	0.34%

Primary care physicians were forecast to grow by 6.3 percent between 2006 and 2030, with the number of active physicians predicted to increase from 25,289 in 2006 to 27,360 in 2020, then decline to 26,889 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to increase from 131.1 physicians per 100,000 population in 2006 to 137.8 physicians per 100,000 population in 2020, then decline to 134.3 physicians per 100,000 population in 2030.

Non-primary care physicians were also forecast to grow by 15.6 percent between 2006 and 2030, with the number of active physicians predicted to increase from 50,200 in 2006 to 58,053 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 289.8 physicians per 100,000 population in 2030.

Figure 37 – New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	26,408	135.8	2010	52,028	267.5
2015	27,093	137.8	2015	54,353	276.4
2020	27,360	137.8	2020	56,031	282.2
2025	27,253	136.4	2025	57,188	286.2
2030	26,889	134.3	2030	58,053	289.8
Percent change 2006-2030	6.3%	2.4%	Percent change 2006-2030	15.6%	11.4%
Annualized change 2006-2030	0.26%	0.10%	Annualized change 2006-2030	0.61%	0.45%

Specialty-Specific Supply Forecasts

The supply model forecasts for 18 specialty groups through 2030 in New York. In most cases in this scenario, the supply of physicians was forecast to grow between 2006 and 2030. Specialty-specific supply forecasts fell into three patterns. A number of specialties were projected to experience growth over the entire forecast period: anesthesiology, cardiovascular disease, emergency medicine, general pediatrics, general surgery, orthopedic

surgery, radiology, and other internal medicine subspecialties. A number of specialties were projected to experience a period of growth, then begin to decline between 2015 and 2025 to the end of the forecast period: general internal medicine, general/family medicine, obstetrics and gynecology, otolaryngology, and other specialties. Finally, there were a number of specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, psychiatry, urology, and other surgical subspecialties.

Primary Care Specialties

General/Family Medicine

General/family physicians were forecast to increase by 0.3 percent between 2006 and 2030, well below the overall predicted rate of growth among primary care physicians, with the number of active general/family physicians predicted to increase from 5,108 in 2006 to 5,405 in 2020, then decline to 5,124 in 2030. Adjusting for the projected population growth in the state, the general/family physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 27.4 physicians per 100,000 population in 2015, then decline to 25.6 physicians per 100,000 population in 2030.

General Internal Medicine

General internists were forecast to grow by 5.6 percent between 2006 and 2030, slightly below the overall predicted rate of growth among primary care physicians, with the number of active general internists predicted to increase from 14,242 in 2006 to 15,419 in 2020, then decline to 15,034 in 2030. Adjusting for the projected population growth in the state, the general internist to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 77.9 physicians per 100,000 population in 2015, then decline to 75.1 physicians per 100,000 population in 2030.

General Pediatrics

General pediatricians were forecast to grow by 13.3 percent between 2006 and 2030, well above the overall predicted rate of growth among primary care physicians, with the number of active general pediatricians predicted to increase from 5,939 in 2006 to 6,731 in 2030. Adjusting for the projected population growth in the state, the general pediatrician to population ratio was predicted to increase from 30.8 physicians per 100,000 population in 2006 to 33.6 physicians per 100,000 population in 2030.

Figure 38 – New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	26,408	135.8	2010	5,254	27.0
2015	27,093	137.8	2015	5,395	27.4
2020	27,360	137.8	2020	5,405	27.2
2025	27,253	136.4	2025	5,308	26.6
2030	26,889	134.3	2030	5,124	25.6
Percent change 2006-2030	6.3%	2.4%	Percent change 2006-2030	0.3%	-3.4%
Annualized change 2006-2030	0.26%	0.10%	Annualized change 2006-2030	0.01%	-0.14%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,978	77.0	2010	6,176	31.7
2015	15,317	77.9	2015	6,382	32.5
2020	15,419	77.7	2020	6,536	32.9
2025	15,303	76.6	2025	6,642	33.2
2030	15,034	75.1	2030	6,731	33.6
Percent change 2006-2030	5.6%	1.7%	Percent change 2006-2030	13.3%	9.1%
Annualized change 2006-2030	0.23%	0.07%	Annualized change 2006-2030	0.52%	0.37%

Non-Primary Care Specialties

Cardiovascular Disease

Cardiologists were forecast to grow by 34.7 percent between 2006 and 2030, far greater than the overall predicted growth among non-primary care physicians, with the number of active cardiologists predicted to increase from 2,335 in 2006 to 3,145 in 2030. Adjusting for the projected population growth in the state, the cardiologist to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 15.7 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

Other internal medicine subspecialists were forecast to grow by 47.7 percent between 2006 and 2030, far greater than the overall predicted rate of growth among non-primary care physicians, with the number of active physicians predicted to increase from 8,974 in 2006 to 13,254 in 2030. Adjusting for the projected population growth in the state, the other internal medicine subspecialist to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 66.2 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

Obstetricians and gynecologists were forecast to grow by 8.1 percent between 2006 and 2030, well below the overall predicted rate of growth among non-primary care physicians, with the number of active obstetricians and gynecologists predicted to increase from 3,832 in 2006 to 4,157 in 2025, then decline to 4,141 in 2030. Adjusting for the projected population growth in the state, the obstetrician and gynecologist to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 20.9 physicians per 100,000 population in 2020, then decline to 20.7 physicians per 100,000 population in 2030.

Pathology

Pathologists were forecast to decline by 22.9 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active pathologists predicted to decrease from 1,716 in 2006 to 1,323 in 2030. Adjusting for the projected population growth in the state, the pathologist to population ratio was predicted to decrease from 8.9 physicians per 100,000 population in 2006 to 6.6 physicians per 100,000 population in 2030.

Figure 39 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,450	12.6	2010	9,645	49.6
2015	2,668	13.6	2015	10,729	54.6
2020	2,851	14.4	2020	11,695	58.9
2025	2,999	15.0	2025	12,510	62.6
2030	3,145	15.7	2030	13,254	66.2
Percent change 2006-2030	34.7%	29.7%	Percent change 2006-2030	47.7%	42.2%
Annualized change 2006-2030	1.25%	1.09%	Annualized change 2006-2030	1.64%	1.48%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,950	20.3	2010	1,639	8.4
2015	4,082	20.8	2015	1,566	8.0
2020	4,144	20.9	2020	1,491	7.5
2025	4,157	20.8	2025	1,410	7.1
2030	4,141	20.7	2030	1,323	6.6
Percent change 2006-2030	8.1%	4.1%	Percent change 2006-2030	-22.9%	-25.8%
Annualized change 2006-2030	0.32%	0.17%	Annualized change 2006-2030	-1.08%	-1.23%

Psychiatry

Psychiatrists were forecast to decline by 12.6 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active psychiatrists predicted to decrease from 6,166 in 2006 to 5,387 in 2030. Adjusting for the projected population growth in the state, the psychiatrist to population ratio was predicted to decrease from 32.0 physicians per 100,000 population in 2006 to 26.9 physicians per 100,000 population in 2030.

Anesthesiology

Anesthesiologists were forecast to grow by 13.7 percent between 2006 and 2030, slightly below the overall predicted growth among non-primary care physicians, with the number of active anesthesiologists predicted to increase from 3,695 in 2006 to 4,201 in 2030. Adjusting for the projected population growth in the state, the anesthesiologist to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 21.0 physicians per 100,000 population in 2030.

Radiology

Radiologists were forecast to grow by 22.3 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active radiologists predicted to increase from 3,548 in 2006 to 4,340 in 2030. Adjusting for the projected population growth in the state, the radiologist to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 21.7 physicians per 100,000 population in 2030.

Emergency Medicine

Emergency medicine physicians were forecast to grow by 61.7 percent between 2006 and 2030, far above the overall predicted growth among non-primary care physicians, with the number of active emergency medicine physicians predicted to increase from 2,712 in 2006 to 4,385 in 2030. Adjusting for the projected population growth in the state, the emergency medicine physician to population ratio was predicted to increase from 14.1 physicians per 100,000 population in 2006 to 21.9 physicians per 100,000 population in 2030.

Figure 40 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,095	31.3	2010	3,836	19.7
2015	6,038	30.7	2015	3,891	19.8
2020	5,829	29.4	2020	4,062	20.5
2025	5,594	28.0	2025	4,166	20.8
2030	5,387	26.9	2030	4,201	21.0
Percent change 2006-2030	-12.6%	-15.9%	Percent change 2006-2030	13.7%	9.5%
Annualized change 2006-2030	-0.56%	-0.72%	Annualized change 2006-2030	0.54%	0.38%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,799	19.5	2010	2,992	15.4
2015	4,017	20.4	2015	3,407	17.3
2020	4,157	20.9	2020	3,782	19.0
2025	4,261	21.3	2025	4,114	20.6
2030	4,340	21.7	2030	4,385	21.9
Percent change 2006-2030	22.3%	17.8%	Percent change 2006-2030	61.7%	55.7%
Annualized change 2006-2030	0.84%	0.69%	Annualized change 2006-2030	2.02%	1.86%

General Surgery

General surgeons were forecast to grow by 20.6 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active general surgeons predicted to increase from 2,683 in 2006 to 3,235 in 2030. Adjusting for the projected population growth in the state, the general surgeons to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 16.2 physicians per 100,000 population in 2030.

Ophthalmology

Ophthalmologists were forecast to decline by 16.6 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active ophthalmologists predicted to decrease from 1,974 in 2006 to 1,646 in 2030. Adjusting for the projected population growth in the state, the ophthalmologist to population ratio was predicted to decrease from 10.2 physicians per 100,000 population in 2006 to 8.2 physicians per 100,000 population in 2030.

Otolaryngology

Otolaryngologists were forecast to decline by 3.4 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active otolaryngologists predicted to increase from 828 in 2006 to 843 in 2015, then decline to 800 in 2030. Adjusting for the projected population growth in the state, the otolaryngologist to population ratio was predicted to remain at 4.3 physicians per 100,000 population until 2015, then decline to 4.0 physicians per 100,000 population in 2030.

Orthopedic Surgery

Orthopedic surgeons were forecast to grow by 13.5 percent between 2006 and 2030, somewhat below the overall predicted growth among non-primary care physicians, with the number of active orthopedic surgeons predicted to increase from 1,931 in 2006 to 2,192 in 2030. Adjusting for the projected population growth in the state, the orthopedic surgeon to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 10.9 physicians per 100,000 population in 2030.

Figure 41 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

General Surgery			Ophthalmology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,824	14.5	2010	1,927	9.9
2015	2,981	15.2	2015	1,868	9.5
2020	3,072	15.5	2020	1,802	9.1
2025	3,164	15.8	2025	1,717	8.6
2030	3,235	16.2	2030	1,646	8.2
Percent change 2006-2030	20.6%	16.1%	Percent change 2006-2030	-16.6%	-19.7%
Annualized change 2006-2030	0.78%	0.63%	Annualized change 2006-2030	-0.75%	-0.91%

Otolaryngology			Orthopedic Surgery		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	831	4.3	2010	2,002	10.3
2015	843	4.3	2015	2,064	10.5
2020	831	4.2	2020	2,117	10.7
2025	825	4.1	2025	2,156	10.8
2030	800	4.0	2030	2,192	10.9
Percent change 2006-2030	-3.4%	-6.9%	Percent change 2006-2030	13.5%	9.3%
Annualized change 2006-2030	-0.14%	-0.30%	Annualized change 2006-2030	0.53%	0.37%

Urology

Urologists were forecast to decline by 16.5 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active urologists predicted to decrease from 937 in 2006 to 783 in 2030. Adjusting for the projected population growth in the state, the urologist to population ratio was predicted to decline from 4.9 physicians per 100,000 population in 2006 to 3.9 physicians per 100,000 population in 2030.

Other Surgery Subspecialties

Other surgical subspecialists were forecast to decline by 10.7 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to decrease from 1,399 in 2006 to 1,250 in 2030. Adjusting for the projected population growth in the state, the other surgical subspecialist to population ratio was predicted to decrease from 7.3 physicians per 100,000 population in 2006 to 6.2 physicians per 100,000 population in 2030.

Other Specialties

Other specialists were forecast to grow by 6.7 percent between 2006 and 2030, well below the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase from 7,470 in 2006 to 8,013 in 2020, then decline slightly to 7,970 in 2030. Adjusting for the projected population growth in the state, the other specialist to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 40.4 physicians per 100,000 population in 2015, then decline to 39.8 physicians per 100,000 population in 2030.

Figure 42 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	914	4.7	2010	1,388	7.1
2015	881	4.5	2015	1,366	6.9
2020	844	4.2	2020	1,342	6.8
2025	814	4.1	2025	1,301	6.5
2030	783	3.9	2030	1,250	6.2
Percent change 2006-2030	-16.5%	-19.5%	Percent change 2006-2030	-10.7%	-14.0%
Annualized change 2006-2030	-0.75%	-0.90%	Annualized change 2006-2030	-0.47%	-0.63%

Other Specialties		
Year	Physicians	Physicians per 100,000 Population
2006	7,470	38.7
2010	7,736	39.8
2015	7,953	40.4
2020	8,013	40.4
2025	8,000	40.0
2030	7,970	39.8
Percent change 2006-2030	6.7%	2.8%
Annualized change 2006-2030	0.27%	0.11%

State Level Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care)

The supply model forecast a 7.2 percent increase in the supply of physicians between 2006 and 2030, with the number of active physicians predicted to increase from 75,489 in 2006 to 81,241 in 2025, then decline to 80,942 in 2030. Adjusting for the projected population growth in the state (3.8 percent), the physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 408.9 physicians per 100,000 population in 2020, then decline to 404.1 physicians per 100,000 population in 2030.

Figure 43 – New York Physician Supply Forecast, 2006-2030

Year	Physicians	Physicians per 100,000 Population
2006	75,489	391.3
2010	78,236	402.2
2015	80,246	408.1
2020	81,191	408.9
2025	81,241	406.6
2030	80,942	404.1
Percent change 2006-2030	7.2%	3.3%
Annualized change 2006-2030	0.29%	0.13%

Primary care physicians were forecast to grow by 2.1 percent between 2006 and 2030, with the number of active physicians predicted to increase from 25,289 in 2006 to 26,744 in 2015, then decline to 25,823 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to increase from 131.1 physicians per 100,000 population in 2006 to 136.1 physicians per 100,000 population in 2015, then decline to 128.9 physicians per 100,000 population in 2030.

Non-primary care physicians were also forecast to grow by 9.8 percent between 2006 and 2030, with the number of active physicians predicted to increase from 50,200 in 2006 to 55,119 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 275.2 physicians per 100,000 population in 2030.

Figure 44 – New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	26,354	135.5	2010	51,882	266.7
2015	26,774	136.1	2015	53,472	271.9
2020	26,774	134.8	2020	54,417	274.1
2025	26,400	132.1	2025	54,841	274.4
2030	25,823	128.9	2030	55,119	275.2
Percent change 2006-2030	2.1%	-1.7%	Percent change 2006-2030	9.8%	5.7%
Annualized change 2006-2030	0.09%	-0.07%	Annualized change 2006-2030	0.39%	0.23%

Specialty-Specific Supply Forecasts

The supply model forecasts for 18 specialty groups through 2030 in New York. In most cases in this scenario, the supply of physicians was forecast to grow between 2006 and 2030. Specialty-specific supply forecasts fall into three patterns. A number of specialties were projected to experience growth over the entire forecast period:

cardiovascular disease, emergency medicine, general pediatrics, general surgery, orthopedic surgery, radiology, and other internal medicine subspecialties. A number of specialties were projected to experience a period of growth, then begin to decline between 2015 and 2025 to the end of the forecast period: anesthesiology, general internal medicine, general/family medicine, obstetrics and gynecology, otolaryngology, and other specialties. Finally, there were a number of specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, psychiatry, urology, and other surgical subspecialties.

Primary Care Specialties

General/Family Medicine

General/family physicians were forecast to decrease by 3.7 percent between 2006 and 2030, unlike the overall predicted rate of growth among primary care physicians, with the number of active general/family physicians predicted to increase from 5,108 in 2006 to 5,331 in 2015, then decline to 4,921 in 2030. Adjusting for the projected population growth in the state, the general/family physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 27.1 physicians per 100,000 population in 2015, then decline to 24.6 physicians per 100,000 population in 2030.

General Internal Medicine

General internists were forecast to grow by 1.4 percent between 2006 and 2030, slightly below the overall predicted rate of growth among primary care physicians, with the number of active general internists predicted to increase from 14,242 in 2006 to 15,136 in 2015, then decline to 14,438 in 2030. Adjusting for the projected population growth in the state, the general internist to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 77.0 physicians per 100,000 population in 2015, then decline to 72.1 physicians per 100,000 population in 2030.

General Pediatrics

General pediatricians were forecast to grow by 8.8 percent between 2006 and 2030, well above the overall predicted rate of growth among primary care physicians, with the number of active general pediatricians predicted to increase from 5,939 in 2006 to 6,464 in 2030. Adjusting for the projected population growth in the state, the general pediatrician to population ratio was predicted to increase from 30.8 physicians per 100,000 population in 2006 to 32.3 physicians per 100,000 population in 2030.

Figure 45 – New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	26,354	135.5	2010	5,243	27.0
2015	26,774	136.1	2015	5,331	27.1
2020	26,774	134.8	2020	5,288	26.6
2025	26,400	132.1	2025	5,142	25.7
2030	25,823	128.9	2030	4,921	24.6
Percent change 2006-2030	2.1%	-1.7%	Percent change 2006-2030	-3.7%	-7.2%
Annualized change 2006-2030	0.09%	-0.07%	Annualized change 2006-2030	-0.16%	-0.31%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,948	76.8	2010	6,163	31.7
2015	15,136	77.0	2015	6,306	32.1
2020	15,087	76.0	2020	6,398	32.2
2025	14,824	74.2	2025	6,434	32.2
2030	14,438	72.1	2030	6,464	32.3
Percent change 2006-2030	1.4%	-2.4%	Percent change 2006-2030	8.8%	4.8%
Annualized change 2006-2030	0.06%	-0.10%	Annualized change 2006-2030	0.35%	0.20%

Non-Primary Care Specialties

Cardiovascular Disease

Cardiologists were forecast to grow by 27.9 percent between 2006 and 2030, far greater than the overall predicted growth among non-primary care physicians, with the number of active cardiologists predicted to increase from 2,335 in 2006 to 2,986 in 2030. Adjusting for the projected population growth in the state, the cardiologist to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 14.9 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

Other internal medicine subspecialists were forecast to grow by 40.2 percent between 2006 and 2030, far greater than the overall predicted rate of growth among non-primary care physicians, with the number of active physicians predicted to increase from 8,974 in 2006 to 12,584 in 2030. Adjusting for the projected population growth in the state, the other internal medicine subspecialist to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 62.8 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

Obstetricians and gynecologists were forecast to grow by 2.6 percent between 2006 and 2030, well below the overall predicted rate of growth among non-primary care physicians, with the number of active obstetricians and gynecologists predicted to increase from 3,832 in 2006 to 4,025 in 2020, then decline to 3,932 in 2030. Adjusting for the projected population growth in the state, the obstetrician and gynecologist to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 20.4 physicians per 100,000 population in 2015, then decline to 19.6 physicians per 100,000 population in 2030.

Pathology

Pathologists were forecast to decline by 26.8 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active pathologists predicted to decrease from 1,716 in 2006 to 1,256 in 2030. Adjusting for the projected population growth in the state, the pathologist to population ratio was predicted to decrease from 8.9 physicians per 100,000 population in 2006 to 6.3 physicians per 100,000 population in 2030.

Figure 46 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,443	12.6	2010	9,618	49.4
2015	2,625	13.3	2015	10,555	53.7
2020	2,768	13.9	2020	11,358	57.2
2025	2,876	14.4	2025	11,996	60.0
2030	2,986	14.9	2030	12,584	62.8
Percent change 2006-2030	27.9%	23.2%	Percent change 2006-2030	40.2%	35.1%
Annualized change 2006-2030	1.03%	0.87%	Annualized change 2006-2030	1.42%	1.26%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,939	20.2	2010	1,635	8.4
2015	4,016	20.4	2015	1,541	7.8
2020	4,025	20.3	2020	1,448	7.3
2025	3,987	20.0	2025	1,352	6.8
2030	3,932	19.6	2030	1,256	6.3
Percent change 2006-2030	2.6%	-1.2%	Percent change 2006-2030	-26.8%	-29.5%
Annualized change 2006-2030	0.11%	-0.05%	Annualized change 2006-2030	-1.29%	-1.45%

Psychiatry

Psychiatrists were forecast to decline by 17.1 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active psychiatrists predicted to decrease from 6,166 in 2006 to 5,115 in 2030. Adjusting for the projected population growth in the state, the psychiatrist to population ratio was predicted to decrease from 32.0 physicians per 100,000 population in 2006 to 25.5 physicians per 100,000 population in 2030.

Anesthesiology

Anesthesiologists were forecast to grow by 7.9 percent between 2006 and 2030, slightly below the overall predicted growth among non-primary care physicians, with the number of active anesthesiologists predicted to increase from 3,695 in 2006 to 3,995 in 2025, then decline to 3,989 in 2030. Adjusting for the projected population growth in the state, the anesthesiologist to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 20.0 physicians per 100,000 population in 2025, the decline slightly to 19.9 physicians per 100,000 population in 2030.

Radiology

Radiologists were forecast to grow by 16.2 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active radiologists predicted to increase from 3,548 in 2006 to 4,121 in 2030. Adjusting for the projected population growth in the state, the radiologist to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 20.6 physicians per 100,000 population in 2030.

Emergency Medicine

Emergency medicine physicians were forecast to grow by 53.5 percent between 2006 and 2030, far above the overall predicted growth among non-primary care physicians, with the number of active emergency medicine physicians predicted to increase from 2,712 in 2006 to 4,164 in 2030. Adjusting for the projected population growth in the state, the emergency medicine physician to population ratio was predicted to increase from 14.1 physicians per 100,000 population in 2006 to 20.8 physicians per 100,000 population in 2030.

Figure 47 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,078	31.2	2010	3,825	19.7
2015	5,940	30.2	2015	3,828	19.5
2020	5,661	28.5	2020	3,945	19.9
2025	5,365	26.8	2025	3,995	20.0
2030	5,115	25.5	2030	3,989	19.9
Percent change 2006-2030	-17.1%	-20.1%	Percent change 2006-2030	7.9%	4.0%
Annualized change 2006-2030	-0.78%	-0.93%	Annualized change 2006-2030	0.32%	0.16%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,788	19.5	2010	2,984	15.3
2015	3,952	20.1	2015	3,351	17.0
2020	4,037	20.3	2020	3,673	18.5
2025	4,086	20.4	2025	3,945	19.7
2030	4,121	20.6	2030	4,164	20.8
Percent change 2006-2030	16.2%	11.9%	Percent change 2006-2030	53.5%	47.9%
Annualized change 2006-2030	0.63%	0.47%	Annualized change 2006-2030	1.80%	1.64%

General Surgery

General surgeons were forecast to grow by 14.5 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active general surgeons predicted to increase from 2,683 in 2006 to 3,072 in 2030. Adjusting for the projected population growth in the state, the general surgeons to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 15.3 physicians per 100,000 population in 2030.

Ophthalmology

Ophthalmologists were forecast to decline by 20.8 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active ophthalmologists predicted to decrease from 1,974 in 2006 to 1,563 in 2030. Adjusting for the projected population growth in the state, the ophthalmologist to population ratio was predicted to decrease from 10.2 physicians per 100,000 population in 2006 to 7.8 physicians per 100,000 population in 2030.

Otolaryngology

Otolaryngologists were forecast to decline by 8.2 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active otolaryngologists predicted to increase from 828 in 2006 to 829 in 2015, then decline to 760 in 2030. Adjusting for the projected population growth in the state, the otolaryngologist to population ratio was predicted to remain at 4.3 physicians per 100,000 population until 2010, then decline to 3.8 physicians per 100,000 population in 2030.

Orthopedic Surgery

Orthopedic surgeons were forecast to grow by 7.8 percent between 2006 and 2030, somewhat below the overall predicted growth among non-primary care physicians, with the number of active orthopedic surgeons predicted to increase from 1,931 in 2006 to 2,081 in 2030. Adjusting for the projected population growth in the state, the orthopedic surgeon to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to between 10.3 and 10.4 physicians per 100,000 population from 2010 through 2030.

Figure 48 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

General Surgery			Ophthalmology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,816	14.5	2010	1,921	9.9
2015	2,933	14.9	2015	1,838	9.3
2020	2,984	15.0	2020	1,750	8.8
2025	3,034	15.2	2025	1,647	8.2
2030	3,072	15.3	2030	1,563	7.8
Percent change 2006-2030	14.5%	10.3%	Percent change 2006-2030	-20.8%	-23.8%
Annualized change 2006-2030	0.57%	0.41%	Annualized change 2006-2030	-0.97%	-1.12%

Otolaryngology			Orthopedic Surgery		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	828	4.3	2010	1,996	10.3
2015	829	4.2	2015	2,031	10.3
2020	807	4.1	2020	2,056	10.4
2025	791	4.0	2025	2,067	10.3
2030	760	3.8	2030	2,081	10.4
Percent change 2006-2030	-8.2%	-11.6%	Percent change 2006-2030	7.8%	3.8%
Annualized change 2006-2030	-0.36%	-0.51%	Annualized change 2006-2030	0.31%	0.16%

Urology

Urologists were forecast to decline by 20.7 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active urologists predicted to decrease from 937 in 2006 to 743 in 2030. Adjusting for the projected population growth in the state, the urologist to population ratio was predicted to decline from 4.9 physicians per 100,000 population in 2006 to 3.7 physicians per 100,000 population in 2030.

Other Surgery Subspecialties

Other surgical subspecialists were forecast to decline by 15.2 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to decrease from 1,399 in 2006 to 1,186 in 2030. Adjusting for the projected population growth in the state, the other surgical subspecialist to population ratio was predicted to decrease from 7.3 physicians per 100,000 population in 2006 to 5.9 physicians per 100,000 population in 2030.

Other Specialties

Other specialists were forecast to grow by 1.3 percent between 2006 and 2030, well below the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase from 7,470 in 2006 to 7,824 in 2015, then decline to 7,567 in 2030. Adjusting for the projected population growth in the state, the other specialist to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 39.8 physicians per 100,000 population in 2015, then decline to 37.8 physicians per 100,000 population in 2030.

Figure 49 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	911	4.7	2010	1,384	7.1
2015	867	4.4	2015	1,344	6.8
2020	819	4.1	2020	1,303	6.6
2025	781	3.9	2025	1,247	6.2
2030	743	3.7	2030	1,186	5.9
Percent change 2006-2030	-20.7%	-23.6%	Percent change 2006-2030	-15.2%	-18.3%
Annualized change 2006-2030	-0.96%	-1.12%	Annualized change 2006-2030	-0.68%	-0.84%

Other Specialties		
Year	Physicians	Physicians per 100,000 Population
2006	7,470	38.7
2010	7,714	39.7
2015	7,824	39.8
2020	7,782	39.2
2025	7,671	38.4
2030	7,567	37.8
Percent change 2006-2030	1.3%	-2.4%
Annualized change 2006-2030	0.05%	-0.10%

State Level Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care)

The supply model forecast a 7.2 percent increase in the supply of physicians between 2006 and 2030, with the number of active physicians predicted to increase from 75,489 in 2006 to 81,241 in 2025, then decline to 80,942 in 2030. Adjusting for the projected population growth in the state (3.8 percent), the physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 408.9 physicians per 100,000 population in 2020, then decline to 404.1 physicians per 100,000 population in 2030.

Figure 50 – New York Physician Supply Forecast, 2006-2030

Year	Physicians	Physicians per 100,000 Population
2006	75,489	391.3
2010	78,236	402.2
2015	80,246	408.1
2020	81,191	408.9
2025	81,241	406.6
2030	80,942	404.1
Percent change 2006-2030	7.2%	3.3%
Annualized change 2006-2030	0.29%	0.13%

Primary care physicians were forecast to grow by 2.8 percent between 2006 and 2030, with the number of active physicians predicted to increase from 25,289 in 2006 to 26,865 in 2020, then decline to 25,989 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to increase from 131.1 physicians per 100,000 population in 2006 to 136.4 physicians per 100,000 population in 2015, then decline to 129.8 physicians per 100,000 population in 2030.

Non-primary care physicians were also forecast to grow by 9.5 percent between 2006 and 2030, with the number of active physicians predicted to increase from 50,200 in 2006 to 54,953 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 275.4 physicians per 100,000 population in 2030.

Figure 51 – New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	26,363	135.5	2010	51,873	266.7
2015	26,823	136.4	2015	53,423	271.7
2020	26,865	135.3	2020	54,326	273.6
2025	26,533	132.8	2025	54,708	273.8
2030	25,989	129.8	2030	54,953	274.4
Percent change 2006-2030	2.8%	-1.0%	Percent change 2006-2030	9.5%	5.4%
Annualized change 2006-2030	0.11%	-0.04%	Annualized change 2006-2030	0.38%	0.22%

Specialty-Specific Supply Forecasts

The supply model forecasts for 18 specialty groups through 2030 in New York. In most cases in this scenario, the supply of physicians was forecast to grow between 2006 and 2030. Specialty-specific supply forecasts fall into three patterns. A number of specialties were projected to experience growth over the entire forecast period:

cardiovascular disease, emergency medicine, general pediatrics, general surgery, orthopedic surgery, radiology, and other internal medicine subspecialties. A number of specialties were projected to experience a period of growth, then begin to decline between 2015 and 2025 to the end of the forecast period: anesthesiology, general internal medicine, general/family medicine, obstetrics and gynecology, otolaryngology, and other specialties. Finally, there were a number of specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, psychiatry, urology, and other surgical subspecialties.

Primary Care Specialties

General/Family Medicine

General/family physicians were forecast to decrease by 3.0 percent between 2006 and 2030, unlike the overall predicted rate of growth among primary care physicians, with the number of active general/family physicians predicted to increase from 5,108 in 2006 to 5,341 in 2015, then decline to 4,953 in 2030. Adjusting for the projected population growth in the state, the general/family physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 27.2 physicians per 100,000 population in 2015, then decline to 24.7 physicians per 100,000 population in 2030.

General Internal Medicine

General internists were forecast to grow by 2.0 percent between 2006 and 2030, slightly below the overall predicted rate of growth among primary care physicians, with the number of active general internists predicted to increase from 14,242 in 2006 to 15,165 in 2015, then decline to 14,531 in 2030. Adjusting for the projected population growth in the state, the general internist to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 77.1 physicians per 100,000 population in 2015, then decline to 72.6 physicians per 100,000 population in 2030.

General Pediatrics

General pediatricians were forecast to grow by 9.5 percent between 2006 and 2030, well above the overall predicted rate of growth among primary care physicians, with the number of active general pediatricians predicted to increase from 5,939 in 2006 to 6,506 in 2030. Adjusting for the projected population growth in the state, the general pediatrician to population ratio was predicted to increase from 30.8 physicians per 100,000 population in 2006 to 32.5 physicians per 100,000 population in 2030.

Figure 52 – New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	26,363	135.5	2010	5,245	27.0
2015	26,823	136.4	2015	5,341	27.2
2020	26,865	135.3	2020	5,307	26.7
2025	26,533	132.8	2025	5,168	25.9
2030	25,989	129.8	2030	4,953	24.7
Percent change 2006-2030	2.8%	-1.0%	Percent change 2006-2030	-3.0%	-6.6%
Annualized change 2006-2030	0.11%	-0.04%	Annualized change 2006-2030	-0.13%	-0.28%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,952	76.9	2010	6,165	31.7
2015	15,165	77.1	2015	6,318	32.1
2020	15,139	76.2	2020	6,419	32.3
2025	14,899	74.6	2025	6,466	32.4
2030	14,531	72.6	2030	6,506	32.5
Percent change 2006-2030	2.0%	-1.7%	Percent change 2006-2030	9.5%	5.5%
Annualized change 2006-2030	0.08%	-0.07%	Annualized change 2006-2030	0.38%	0.22%

Non-Primary Care Specialties

Cardiovascular Disease

Cardiologists were forecast to grow by 27.5 percent between 2006 and 2030, far greater than the overall predicted growth among non-primary care physicians, with the number of active cardiologists predicted to increase from 2,335 in 2006 to 2,977 in 2030. Adjusting for the projected population growth in the state, the cardiologist to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 14.9 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

Other internal medicine subspecialists were forecast to grow by 39.8 percent between 2006 and 2030, far greater than the overall predicted rate of growth among non-primary care physicians, with the number of active physicians predicted to increase from 8,974 in 2006 to 12,546 in 2030. Adjusting for the projected population growth in the state, the other internal medicine subspecialist to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 62.6 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

Obstetricians and gynecologists were forecast to grow by 2.3 percent between 2006 and 2030, well below the overall predicted rate of growth among non-primary care physicians, with the number of active obstetricians and gynecologists predicted to increase from 3,832 in 2006 to 4,018 in 2020, then decline to 3,920 in 2030. Adjusting for the projected population growth in the state, the obstetrician and gynecologist to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 20.4 physicians per 100,000 population in 2015, then decline to 19.6 physicians per 100,000 population in 2030.

Pathology

Pathologists were forecast to decline by 27.0 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active pathologists predicted to decrease from 1,716 in 2006 to 1,252 in 2030. Adjusting for the projected population growth in the state, the pathologist to population ratio was predicted to decrease from 8.9 physicians per 100,000 population in 2006 to 6.3 physicians per 100,000 population in 2030.

Figure 53 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,443	12.6	2010	9,616	49.4
2015	2,622	13.3	2015	10,545	53.6
2020	2,764	13.9	2020	11,339	57.1
2025	2,869	14.4	2025	11,967	59.9
2030	2,977	14.9	2030	12,546	62.6
Percent change 2006-2030	27.5%	22.8%	Percent change 2006-2030	39.8%	34.6%
Annualized change 2006-2030	1.02%	0.86%	Annualized change 2006-2030	1.41%	1.25%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,939	20.2	2010	1,634	8.4
2015	4,012	20.4	2015	1,539	7.8
2020	4,018	20.2	2020	1,446	7.3
2025	3,977	19.9	2025	1,349	6.7
2030	3,920	19.6	2030	1,252	6.3
Percent change 2006-2030	2.3%	-1.5%	Percent change 2006-2030	-27.0%	-29.7%
Annualized change 2006-2030	0.09%	-0.06%	Annualized change 2006-2030	-1.30%	-1.46%

Psychiatry

Psychiatrists were forecast to decline by 17.3 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active psychiatrists predicted to decrease from 6,166 in 2006 to 5,099 in 2030. Adjusting for the projected population growth in the state, the psychiatrist to population ratio was predicted to decrease from 32.0 physicians per 100,000 population in 2006 to 25.5 physicians per 100,000 population in 2030.

Anesthesiology

Anesthesiologists were forecast to grow by 7.6 percent between 2006 and 2030, somewhat below the overall predicted growth among non-primary care physicians, with the number of active anesthesiologists predicted to increase from 3,695 in 2006 to 3,986 in 2025, then decline to 3,977 in 2030. Adjusting for the projected population growth in the state, the anesthesiologist to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 19.9 physicians per 100,000 population in 2025, and remain at that level through 2030.

Radiology

Radiologists were forecast to grow by 15.8 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active radiologists predicted to increase from 3,548 in 2006 to 4,109 in 2030. Adjusting for the projected population growth in the state, the radiologist to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 20.5 physicians per 100,000 population in 2030.

Emergency Medicine

Emergency medicine physicians were forecast to grow by 53.1 percent between 2006 and 2030, far above the overall predicted growth among non-primary care physicians, with the number of active emergency medicine physicians predicted to increase from 2,712 in 2006 to 4,151 in 2030. Adjusting for the projected population growth in the state, the emergency medicine physician to population ratio was predicted to increase from 14.1 physicians per 100,000 population in 2006 to 20.7 physicians per 100,000 population in 2030.

Figure 54 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,077	31.2	2010	3,825	19.7
2015	5,934	30.2	2015	3,824	19.4
2020	5,652	28.5	2020	3,938	19.8
2025	5,352	26.8	2025	3,986	19.9
2030	5,099	25.5	2030	3,977	19.9
Percent change 2006-2030	-17.3%	-20.4%	Percent change 2006-2030	7.6%	3.6%
Annualized change 2006-2030	-0.79%	-0.94%	Annualized change 2006-2030	0.31%	0.15%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,787	19.5	2010	2,983	15.3
2015	3,948	20.1	2015	3,348	17.0
2020	4,030	20.3	2020	3,667	18.5
2025	4,076	20.4	2025	3,935	19.7
2030	4,109	20.5	2030	4,151	20.7
Percent change 2006-2030	15.8%	11.5%	Percent change 2006-2030	53.1%	47.4%
Annualized change 2006-2030	0.61%	0.46%	Annualized change 2006-2030	1.79%	1.63%

General Surgery

General surgeons were forecast to grow by 14.1 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active general surgeons predicted to increase from 2,683 in 2006 to 3,063 in 2030. Adjusting for the projected population growth in the state, the general surgeons to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 15.3 physicians per 100,000 population in 2030.

Ophthalmology

Ophthalmologists were forecast to decline by 21.1 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active ophthalmologists predicted to decrease from 1,974 in 2006 to 1,558 in 2030. Adjusting for the projected population growth in the state, the ophthalmologist to population ratio was predicted to decrease from 10.2 physicians per 100,000 population in 2006 to 7.8 physicians per 100,000 population in 2030.

Otolaryngology

Otolaryngologists were forecast to decline by 8.5 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active otolaryngologists predicted to remain at 828 from 2006 to 2015, then decline to 757 in 2030. Adjusting for the projected population growth in the state, the otolaryngologist to population ratio was predicted to remain at 4.3 physicians per 100,000 population until 2010, then decline to 3.8 physicians per 100,000 population in 2030.

Orthopedic Surgery

Orthopedic surgeons were forecast to grow by 7.5 percent between 2006 and 2030, somewhat below the overall predicted growth among non-primary care physicians, with the number of active orthopedic surgeons predicted to increase from 1,931 in 2006 to 2,075 in 2030. Adjusting for the projected population growth in the state, the orthopedic surgeon to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 10.4 physicians per 100,000 population in 2030.

Figure 55— New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

General Surgery			Ophthalmology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,816	14.5	2010	1,921	9.9
2015	2,930	14.9	2015	1,836	9.3
2020	2,979	15.0	2020	1,747	8.8
2025	3,027	15.1	2025	1,643	8.2
2030	3,063	15.3	2030	1,558	7.8
Percent change 2006-2030	14.1%	9.9%	Percent change 2006-2030	-21.1%	-24.0%
Annualized change 2006-2030	0.55%	0.40%	Annualized change 2006-2030	-0.98%	-1.14%

Otolaryngology			Orthopedic Surgery		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	828	4.3	2010	1,996	10.3
2015	828	4.2	2015	2,029	10.3
2020	806	4.1	2020	2,053	10.3
2025	789	3.9	2025	2,062	10.3
2030	757	3.8	2030	2,075	10.4
Percent change 2006-2030	-8.5%	-11.9%	Percent change 2006-2030	7.5%	3.5%
Annualized change 2006-2030	-0.37%	-0.53%	Annualized change 2006-2030	0.30%	0.14%

Urology

Urologists were forecast to decline by 20.9 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active urologists predicted to decrease from 937 in 2006 to 741 in 2030. Adjusting for the projected population growth in the state, the urologist to population ratio was predicted to decline from 4.9 physicians per 100,000 population in 2006 to 3.7 physicians per 100,000 population in 2030.

Other Surgery Subspecialties

Other surgical subspecialists were forecast to decline by 15.4 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to decrease from 1,399 in 2006 to 1,183 in 2030. Adjusting for the projected population growth in the state, the other surgical subspecialist to population ratio was predicted to decrease from 7.3 physicians per 100,000 population in 2006 to 5.9 physicians per 100,000 population in 2030.

Other Specialties

Other specialists were forecast to grow by 1.0 percent between 2006 and 2030, well below the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase from 7,470 in 2006 to 7,817 in 2015, then decline slightly to 7,544 in 2030. Adjusting for the projected population growth in the state, the other specialist to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 39.7 physicians per 100,000 population in 2010, then decline to 37.7 physicians per 100,000 population in 2030.

Figure 56– New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	911	4.7	2010	1,384	7.1
2015	866	4.4	2015	1,343	6.8
2020	818	4.1	2020	1,301	6.6
2025	779	3.9	2025	1,244	6.2
2030	741	3.7	2030	1,183	5.9
Percent change 2006-2030	-20.9%	-23.8%	Percent change 2006-2030	-15.4%	-18.6%
Annualized change 2006-2030	-0.97%	-1.13%	Annualized change 2006-2030	-0.70%	-0.85%

Other Specialties		
Year	Physicians	Physicians per 100,000 Population
2006	7,470	38.7
2010	7,713	39.7
2015	7,817	39.7
2020	7,769	39.1
2025	7,653	38.3
2030	7,544	37.7
Percent change 2006-2030	1.0%	-2.7%
Annualized change 2006-2030	0.04%	-0.12%

State Level Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care)

The supply model forecast a 7.2 percent increase in the supply of physicians between 2006 and 2030, with the number of active physicians predicted to increase from 75,489 in 2006 to 81,241 in 2025, then decline to 80,942 in 2030. Adjusting for the projected population growth in the state (3.8 percent), the physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 408.9 physicians per 100,000 population in 2020, then decline to 404.1 physicians per 100,000 population in 2030.

Figure 57 – New York Physician Supply Forecast, 2006-2030

Year	Physicians	Physicians per 100,000 Population
2006	75,489	391.3
2010	78,236	402.2
2015	80,246	408.1
2020	81,191	408.9
2025	81,241	406.6
2030	80,942	404.1
Percent change 2006-2030	7.2%	3.3%
Annualized change 2006-2030	0.29%	0.13%

Primary care physicians were forecast to grow by 3.2 percent between 2006 and 2030, with the number of active physicians predicted to increase from 25,289 in 2006 to 26,920 in 2020, then decline to 26,089 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to increase from 131.1 physicians per 100,000 population in 2006 to 136.6 physicians per 100,000 population in 2015, then decline to 130.3 physicians per 100,000 population in 2030.

Non-primary care physicians were also forecast to grow by 9.3 percent between 2006 and 2030, with the number of active physicians predicted to increase from 50,200 in 2006 to 54,853 in 2030. Adjusting for the projected population growth in the state, the physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 273.9 physicians per 100,000 population in 2030.

Figure 58 – New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	26,368	135.5	2010	51,868	266.6
2015	26,853	136.6	2015	53,393	271.5
2020	26,920	135.6	2020	54,271	273.3
2025	26,613	133.2	2025	54,628	273.4
2030	26,089	130.3	2030	54,853	273.9
Percent change 2006-2030	3.2%	-0.6%	Percent change 2006-2030	9.3%	5.2%
Annualized change 2006-2030	0.13%	-0.03%	Annualized change 2006-2030	0.37%	0.21%

Specialty-Specific Supply Forecasts

The supply model forecasts for 18 specialty groups through 2030 in New York. In most cases in this scenario, the supply of physicians was forecast to grow between 2006 and 2030. Specialty-specific supply forecasts fall into three patterns. A number of specialties were projected to experience growth over the entire forecast period:

cardiovascular disease, emergency medicine, general pediatrics, general surgery, orthopedic surgery, radiology, and other internal medicine subspecialties. A number of specialties were projected to experience a period of growth, then begin to decline between 2015 and 2025 to the end of the forecast period: anesthesiology, general internal medicine, general/family medicine, obstetrics and gynecology, otolaryngology, and other specialties. Finally, there were a number of specialties projected to experience decline throughout the forecast period: ophthalmology, pathology, psychiatry, urology, and other surgical subspecialties.

Primary Care Specialties

General/Family Medicine

General/family physicians were forecast to decrease by 2.7 percent between 2006 and 2030, unlike the overall predicted rate of growth among primary care physicians, with the number of active general/family physicians predicted to increase from 5,108 in 2006 to 5,347 in 2015, then decline to 4,972 in 2030. Adjusting for the projected population growth in the state, the general/family physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 27.2 physicians per 100,000 population in 2015, then decline to 24.8 physicians per 100,000 population in 2030.

General Internal Medicine

General internists were forecast to grow by 2.4 percent between 2006 and 2030, slightly below the overall predicted rate of growth among primary care physicians, with the number of active general internists predicted to increase from 14,242 in 2006 to 15,181 in 2015, then decline to 14,587 in 2030. Adjusting for the projected population growth in the state, the general internist to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 77.2 physicians per 100,000 population in 2015, then decline to 72.8 physicians per 100,000 population in 2030.

General Pediatrics

General pediatricians were forecast to grow by 10.0 percent between 2006 and 2030, well above the overall predicted rate of growth among primary care physicians, with the number of active general pediatricians predicted to increase from 5,939 in 2006 to 6,531 in 2030. Adjusting for the projected population growth in the state, the general pediatrician to population ratio was predicted to increase from 30.8 physicians per 100,000 population in 2006 to 32.6 physicians per 100,000 population in 2030.

Figure 59 – New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	26,368	135.5	2010	5,246	27.0
2015	26,853	136.6	2015	5,347	27.2
2020	26,920	135.6	2020	5,318	26.8
2025	26,613	133.2	2025	5,184	25.9
2030	26,089	130.3	2030	4,972	24.8
Percent change 2006-2030	3.2%	-0.6%	Percent change 2006-2030	-2.7%	-6.3%
Annualized change 2006-2030	0.13%	-0.03%	Annualized change 2006-2030	-0.11%	-0.27%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,955	76.9	2010	6,166	31.7
2015	15,181	77.2	2015	6,325	32.2
2020	15,170	76.4	2020	6,432	32.4
2025	14,944	74.8	2025	6,486	32.5
2030	14,587	72.8	2030	6,531	32.6
Percent change 2006-2030	2.4%	-1.4%	Percent change 2006-2030	10.0%	5.9%
Annualized change 2006-2030	0.10%	-0.06%	Annualized change 2006-2030	0.40%	0.24%

Non-Primary Care Specialties

Cardiovascular Disease

Cardiologists were forecast to grow by 27.3 percent between 2006 and 2030, far greater than the overall predicted growth among non-primary care physicians, with the number of active cardiologists predicted to increase from 2,335 in 2006 to 2,972 in 2030. Adjusting for the projected population growth in the state, the cardiologist to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 14.8 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

Other internal medicine subspecialists were forecast to grow by 39.6 percent between 2006 and 2030, far greater than the overall predicted rate of growth among non-primary care physicians, with the number of active physicians predicted to increase from 8,974 in 2006 to 12,524 in 2030. Adjusting for the projected population growth in the state, the other internal medicine subspecialist to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 62.5 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

Obstetricians and gynecologists were forecast to grow by 2.1 percent between 2006 and 2030, well below the overall predicted rate of growth among non-primary care physicians, with the number of active obstetricians and gynecologists predicted to increase from 3,832 in 2006 to 4,014 in 2020, then decline to 3,913 in 2030. Adjusting for the projected population growth in the state, the obstetrician and gynecologist to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 20.4 physicians per 100,000 population in 2015, then decline to 19.5 physicians per 100,000 population in 2030.

Pathology

Pathologists were forecast to decline by 27.2 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active pathologists predicted to decrease from 1,716 in 2006 to 1,250 in 2030. Adjusting for the projected population growth in the state, the pathologist to population ratio was predicted to decrease from 8.9 physicians per 100,000 population in 2006 to 6.2 physicians per 100,000 population in 2030.

Figure 60 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,443	12.6	2010	9,615	49.4
2015	2,621	13.3	2015	10,539	53.6
2020	2,761	13.9	2020	11,328	57.1
2025	2,865	14.3	2025	11,950	59.8
2030	2,972	14.8	2030	12,524	62.5
Percent change 2006-2030	27.3%	22.6%	Percent change 2006-2030	39.6%	34.4%
Annualized change 2006-2030	1.01%	0.85%	Annualized change 2006-2030	1.40%	1.24%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,938	20.2	2010	1,634	8.4
2015	4,010	20.4	2015	1,538	7.8
2020	4,014	20.2	2020	1,444	7.3
2025	3,971	19.9	2025	1,347	6.7
2030	3,913	19.5	2030	1,250	6.2
Percent change 2006-2030	2.1%	-1.7%	Percent change 2006-2030	-27.2%	-29.9%
Annualized change 2006-2030	0.09%	-0.07%	Annualized change 2006-2030	-1.31%	-1.47%

Psychiatry

Psychiatrists were forecast to decline by 17.5 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active psychiatrists predicted to decrease from 6,166 in 2006 to 5,090 in 2030. Adjusting for the projected population growth in the state, the psychiatrist to population ratio was predicted to decrease from 32.0 physicians per 100,000 population in 2006 to 25.4 physicians per 100,000 population in 2030.

Anesthesiology

Anesthesiologists were forecast to grow by 7.4 percent between 2006 and 2030, somewhat below the overall predicted growth among non-primary care physicians, with the number of active anesthesiologists predicted to increase from 3,695 in 2006 to 3,980 in 2025, then decline to 3,969 in 2030. Adjusting for the projected population growth in the state, the anesthesiologist to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 19.9 physicians per 100,000 population in 2025, then decline to 19.8 physicians per 100,000 population in 2030.

Radiology

Radiologists were forecast to grow by 15.6 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active radiologists predicted to increase from 3,548 in 2006 to 4,101 in 2030. Adjusting for the projected population growth in the state, the radiologist to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 20.5 physicians per 100,000 population in 2030.

Emergency Medicine

Emergency medicine physicians were forecast to grow by 52.8 percent between 2006 and 2030, far above the overall predicted growth among non-primary care physicians, with the number of active emergency medicine physicians predicted to increase from 2,712 in 2006 to 4,144 in 2030. Adjusting for the projected population growth in the state, the emergency medicine physician to population ratio was predicted to increase from 14.1 physicians per 100,000 population in 2006 to 20.7 physicians per 100,000 population in 2030.

Figure 61 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,077	31.2	2010	3,824	19.7
2015	5,931	30.2	2015	3,822	19.4
2020	5,646	28.4	2020	3,934	19.8
2025	5,344	26.7	2025	3,980	19.9
2030	5,090	25.4	2030	3,969	19.8
Percent change 2006-2030	-17.5%	-20.5%	Percent change 2006-2030	7.4%	3.5%
Annualized change 2006-2030	-0.80%	-0.95%	Annualized change 2006-2030	0.30%	0.14%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,787	19.5	2010	2,983	15.3
2015	3,946	20.1	2015	3,346	17.0
2020	4,026	20.3	2020	3,663	18.5
2025	4,070	20.4	2025	3,929	19.7
2030	4,101	20.5	2030	4,144	20.7
Percent change 2006-2030	15.6%	11.3%	Percent change 2006-2030	52.8%	47.2%
Annualized change 2006-2030	0.61%	0.45%	Annualized change 2006-2030	1.78%	1.62%

General Surgery

General surgeons were forecast to grow by 13.9 percent between 2006 and 2030, well above the overall predicted growth among non-primary care physicians, with the number of active general surgeons predicted to increase from 2,683 in 2006 to 3,057 in 2030. Adjusting for the projected population growth in the state, the general surgeons to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 15.3 physicians per 100,000 population in 2030.

Ophthalmology

Ophthalmologists were forecast to decline by 21.2 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active ophthalmologists predicted to decrease from 1,974 in 2006 to 1,555 in 2030. Adjusting for the projected population growth in the state, the ophthalmologist to population ratio was predicted to decrease from 10.2 physicians per 100,000 population in 2006 to 7.8 physicians per 100,000 population in 2030.

Otolaryngology

Otolaryngologists were forecast to decline by 8.7 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active otolaryngologists predicted to remain at 828 from 2006 to 2015, then decline to 756 in 2030. Adjusting for the projected population growth in the state, the otolaryngologist to population ratio was predicted to remain at 4.3 physicians per 100,000 population until 2010, then decline to 3.8 physicians per 100,000 population in 2030.

Orthopedic Surgery

Orthopedic surgeons were forecast to grow by 7.3 percent between 2006 and 2030, somewhat below the overall predicted growth among non-primary care physicians, with the number of active orthopedic surgeons predicted to increase from 1,931 in 2006 to 2,071 in 2030. Adjusting for the projected population growth in the state, the orthopedic surgeon to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 10.3 physicians per 100,000 population in 2010 and remain at that level through 2030.

Figure 62 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

General Surgery			Ophthalmology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,816	14.5	2010	1,921	9.9
2015	2,929	14.9	2015	1,835	9.3
2020	2,976	15.0	2020	1,746	8.8
2025	3,022	15.1	2025	1,640	8.2
2030	3,057	15.3	2030	1,555	7.8
Percent change 2006-2030	13.9%	9.7%	Percent change 2006-2030	-21.2%	-24.1%
Annualized change 2006-2030	0.55%	0.39%	Annualized change 2006-2030	-0.99%	-1.14%

Otolaryngology			Orthopedic Surgery		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	828	4.3	2010	1,996	10.3
2015	828	4.2	2015	2,028	10.3
2020	805	4.1	2020	2,050	10.3
2025	788	3.9	2025	2,059	10.3
2030	756	3.8	2030	2,071	10.3
Percent change 2006-2030	-8.7%	-12.1%	Percent change 2006-2030	7.3%	3.3%
Annualized change 2006-2030	-0.38%	-0.53%	Annualized change 2006-2030	0.29%	0.14%

Urology

Urologists were forecast to decline by 21.1 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active urologists predicted to decrease from 937 in 2006 to 740 in 2030. Adjusting for the projected population growth in the state, the urologist to population ratio was predicted to decline from 4.9 physicians per 100,000 population in 2006 to 3.7 physicians per 100,000 population in 2030.

Other Surgery Subspecialties

Other surgical subspecialists were forecast to decline by 15.6 percent between 2006 and 2030, unlike the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to decrease from 1,399 in 2006 to 1,181 in 2030. Adjusting for the projected population growth in the state, the other surgical subspecialist to population ratio was predicted to decrease from 7.3 physicians per 100,000 population in 2006 to 5.9 physicians per 100,000 population in 2030.

Other Specialties

Other specialists were forecast to grow by 1.8 percent between 2006 and 2030, well below the overall predicted growth among non-primary care physicians, with the number of active physicians predicted to increase from 7,470 in 2006 to 7,812 in 2015, then decline slightly to 7,531 in 2030. Adjusting for the projected population growth in the state, the other specialist to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 39.7 physicians per 100,000 population in 2010, then decline to 37.6 physicians per 100,000 population in 2030.

Figure 63 – New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	911	4.7	2010	1,383	7.1
2015	865	4.4	2015	1,342	6.8
2020	817	4.1	2020	1,300	6.5
2025	778	3.9	2025	1,242	6.2
2030	740	3.7	2030	1,181	5.9
Percent change 2006-2030	-21.1%	-24.0%	Percent change 2006-2030	-15.6%	-18.7%
Annualized change 2006-2030	-0.98%	-1.14%	Annualized change 2006-2030	-0.70%	-0.86%

Other Specialties		
Year	Physicians	Physicians per 100,000 Population
2006	7,470	38.7
2010	7,712	39.6
2015	7,812	39.7
2020	7,761	39.1
2025	7,642	38.2
2030	7,531	37.6
Percent change 2006-2030	0.8%	-2.9%
Annualized change 2006-2030	0.03%	-0.12%

Chapter 8: New York Physician Demand Forecasting

State Level Physician Demand Forecasts

Forecasts of the demand for physicians in New York were based upon the methodology employed in the Physician Demand Model (PDM) developed and maintained by the Bureau of Health Professions in the Health Resources and Services Administration of the Department of Health and Human Services and used to generate national forecasts for COGME *Sixteenth Report*. The PDM forecasts the future demand for physicians according to the following steps:

- Populations are projected by age, gender, urban or rural location, and source of health insurance
- Physician staffing models that specify per capita physician demand by specialty, age, gender, location, and insurance are applied to the various age, gender, location, and insurance combinations to produce total requirements

For this project, statewide demand forecasts as well as regional demand forecasts for 2006 through 2030 were generated. For both the statewide and regional forecasts, New York-specific population data estimates and forecasts were used. Population projections were generated by the Center using base year 2006 data from Claritas to adjust population projections made by Cornell University's Program on Applied Demographics in 2008.

PDM staffing models were updated at the national level in 2003 to incorporate the most recent age, gender, insurance, and location-specific per capita physician demand by specialty. The PDM contains an automated tool to adjust the national staffing ratios to match a particular state or sub-state location at a point in time. This procedure was followed to generate staffing ratios appropriate to New York, and each of its regions, in 2006.⁷⁵

Physician Demand Forecast Scenarios and Assumptions

Forecasts of physician demand were developed under a number of scenarios. In what follows, descriptions of the scenarios as well as the forecasting results are presented.

Demand

The generic assumptions of all of the demand scenarios were that utilization rates of physician services by age, gender, insurance status, and rurality would remain constant over the forecast period; anticipated population change would follow the trends described in the previous section; and no significant changes would occur in the reimbursement of physician services.

In the first demand scenario, considered the baseline demand scenario, it was further assumed that: 1) the long-term economic health of the state would remain stable over the forecast period; 2) there would be no significant changes in the level of insurance coverage in the state; and 3) there would be no significant improvement in the identification or reduction of unnecessary/marginally-beneficial/duplicative services in the health care delivery system.

⁷⁵ These adjusted staffing models preserve the differences in per capita demand for the various age, gender, location, and insurance categories found nationally. They were scaled up or down so that total demand in the state or region matched actual demand at the given point in time.

In the second demand scenario, in addition to the generic assumptions, it was assumed that: 1) there would be modest long-term economic growth in the state of an additional 1 percent annually⁷⁶ over the forecast period; 2) there would be no significant changes in the level of insurance coverage in the state; and 3) there would be no significant improvement in the identification or reduction of unnecessary/marginally-beneficial/duplicative services in the health care delivery system.

In the third demand scenario, in addition to the generic assumptions, it was assumed that: 1) the long-term economic health of the state would remain stable over the forecast period; 2) there would be a constant increase in the proportion of the population that has health insurance, and by 2020, all residents of the state would have health insurance; and 3) there would be no significant improvement in the identification or reduction of unnecessary/marginally-beneficial/duplicative services in the health care delivery system.

In the fourth demand scenario, in addition to the generic assumptions, it was assumed that: 1) the long-term economic health of the state would remain stable over the forecast period; 2) there would be no significant changes in the level of insurance coverage in the state; and 3) there would be a modest improvement in the identification and reduction of unnecessary/marginally-beneficial/duplicative non-primary care services in the delivery of physician services over the forecast period, resulting in a 5 percent efficiency gain in the provision of non-primary care services by 2030.

New York Physician Demand Forecasts, 2006 – 2030

State Level Demand Scenario 1: Baseline

In this scenario, demand for physicians was forecast to increase by 14.7 percent between 2006 and 2030, with the demand for physicians predicted to increase from 75,489 physicians in 2006 to 83,589 in 2030. Adjusting for the projected population growth in the state, the demand for physicians expressed in terms of a physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 432.3 physicians per 100,000 population in 2030.

Figure 1 – New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	75,489	391.3
2010	76,966	395.6
2015	79,322	403.4
2020	81,942	412.7
2025	84,650	423.6
2030	86,589	432.3
Percent change 2006-2030	14.7%	10.5%
Annualized change 2006-2030	0.57%	0.42%

⁷⁶ To put this assumption into perspective, between 2003 and 2007, New York experienced an average annual growth in real gross state product of 3.2 percent (10th highest in the country). Between 1998 and 2007, the average annual growth rate was 3.1 percent (9th highest in the country). The average annual growth of real gross domestic product in the U.S. during those time periods was 2.3 percent and 2.4 percent, respectively (Source: BEA data retrieved November 2008).

In this scenario, demand for primary care physicians was forecast to increase by 13.3 percent between 2006 and 2030, with the demand for primary care physicians predicted to increase from 25,289 physicians in 2006 to 28,640 in 2030. Adjusting for the projected population growth in the state, the demand for primary care physicians expressed in terms of a physician to population ratio was predicted to grow from 131.1 physicians per 100,000 population in 2006 to 143.0 physicians per 100,000 population in 2030.

In this scenario, demand for non-primary care physicians was forecast to increase by 15.4 percent between 2006 and 2030, with the demand for non-primary care physicians predicted to increase from 50,200 physicians in 2006 to 57,949 in 2030. Adjusting for the projected population growth in the state, the demand for non-primary care physicians expressed in terms of a physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 289.3 physicians per 100,000 population in 2030.

Figure 2 – New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	25,641	131.8	2010	51,325	263.8
2015	26,313	133.8	2015	53,009	269.6
2020	27,137	136.7	2020	54,805	276.0
2025	28,009	140.2	2025	56,641	283.5
2030	28,640	143.0	2030	57,949	289.3
Percent change 2006-2030	13.3%	9.1%	Percent change 2006-2030	15.4%	11.2%
Annualized change 2006-2030	0.52%	0.36%	Annualized change 2006-2030	0.60%	0.44%

Specialty-Specific Demand Forecasts

In this scenario, the demand for physicians was forecast to increase for all specialties with the exception of general pediatrics. Specialty-specific demand forecasts fell into three patterns. The majority of specialties were projected to experience growth over the entire forecast period: general/family medicine, general internal medicine, cardiovascular disease, other internal medicine subspecialties, pathology, psychiatry, anesthesiology, radiology, emergency medicine, general surgery, ophthalmology, otolaryngology, orthopedic surgery, urology, other surgical specialties, and other specialties. Obstetrics and gynecology was forecast to increase in demand through 2020, then decline for the remainder of the forecast period. General pediatrics was forecast to decline in demand through 2015, then increase for the remainder of the forecast period. In this scenario, one specialty, obstetrics and gynecology, was forecast to increase in demand at a slower pace than the population. In all other specialties where demand was forecast to grow, the rate of growth was greater than the rate of growth of the population.

Primary Care Specialties

General/Family Medicine

The baseline scenario forecast a 10.5 percent increase in the demand for general/family physicians between 2006 and 2030, somewhat below the level of growth in demand predicted for primary care physicians, with the demand for general/family physicians predicted to increase from 5,108 physicians in 2006 to 5,643 in 2030. Adjusting for the projected population growth in the state, the demand for general/family physicians expressed

in terms of a physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 28.2 physicians per 100,000 population in 2030.

General Internal Medicine

The baseline scenario forecast a 20.0 percent increase in the demand for general internists between 2006 and 2030, which is above the level of growth in demand predicted for primary care physicians, with the demand for general internists predicted to increase from 14,242 physicians in 2006 to 17,096 in 2030. Adjusting for the projected population growth in the state, the demand for general internists expressed in terms of a physician to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 85.4 physicians per 100,000 population in 2030.

General Pediatrics

The baseline scenario forecast a 0.6 percent decrease in the demand for general pediatricians between 2006 and 2030, unlike the growth in demand predicted for primary care physicians, with the demand for general pediatricians predicted to decrease from 5,939 physicians in 2006 to 5,790 in 2015, then increase to 5,901 in 2030. Adjusting for the projected population growth in the state, the demand for general pediatricians expressed in terms of a physician to population ratio was predicted to decrease from 30.8 physicians per 100,000 population in 2006 to 29.4 physicians per 100,000 population between 2006 and 2015, then increase slightly to 29.5 physicians per 100,000 population in 2030.

Figure 3 – New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	25,641	131.8	2010	5,188	26.7
2015	26,313	133.8	2015	5,304	27.0
2020	27,137	136.7	2020	5,431	27.4
2025	28,009	140.2	2025	5,561	27.8
2030	28,640	143.0	2030	5,643	28.2
Percent change 2006-2030	13.3%	9.1%	Percent change 2006-2030	10.5%	6.4%
Annualized change 2006-2030	0.52%	0.36%	Annualized change 2006-2030	0.42%	0.26%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,632	75.2	2010	5,821	29.9
2015	15,219	77.4	2015	5,790	29.4
2020	15,863	79.9	2020	5,843	29.4
2025	16,559	82.9	2025	5,889	29.5
2030	17,096	85.4	2030	5,901	29.5
Percent change 2006-2030	20.0%	15.6%	Percent change 2006-2030	-0.6%	-4.3%
Annualized change 2006-2030	0.76%	0.61%	Annualized change 2006-2030	-0.03%	-0.18%

Non-Primary Care Specialties

Cardiovascular Disease

The baseline scenario forecast a 27.1 percent increase in the demand for cardiologists between 2006 and 2030, well above the rate of growth in demand predicted for non-primary care physicians, with the demand for cardiologists predicted to increase from 2,335 physicians in 2006 to 2,968 in 2030. Adjusting for the projected population growth in the state, the demand for cardiologists expressed in terms of a physician to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 14.8 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

The baseline scenario forecast a 20.2 percent increase in the demand for other internal medicine subspecialists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for other internal medicine subspecialists predicted to increase from 8,974 physicians in 2006 to 10,783 in 2030. Adjusting for the projected population growth in the state, the demand for other internal medicine subspecialists expressed in terms of a physician to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 53.8 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

The baseline scenario forecast a 0.9 percent increase in the demand for obstetricians and gynecologists between 2006 and 2030, well below the rate of growth in demand predicted for non-primary care physicians, with the demand for obstetricians and gynecologists predicted to increase from 3,832 physicians in 2006 to 3,872 in 2020, then decrease to 3,865 in 2030. Adjusting for the projected population growth in the state, the demand for obstetricians and gynecologists expressed in terms of a physician to population ratio was predicted to decrease from 19.9 physicians per 100,000 population in 2006 to 19.3 physicians per 100,000 population in 2030.

Pathology

The baseline scenario forecast a 13.8 percent increase in the demand for pathologists between 2006 and 2030, slightly below the rate of growth in demand predicted for non-primary care physicians, with the demand for pathologists predicted to increase from 1,716 physicians in 2006 to 1,953 in 2030. Adjusting for the projected population growth in the state, the demand for pathologists expressed in terms of a physician to population ratio was predicted to increase from 8.9 physicians per 100,000 population in 2006 to 9.8 physicians per 100,000 population in 2030.

Figure 4 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,414	12.4	2010	9,245	47.5
2015	2,549	13.0	2015	9,655	49.1
2020	2,697	13.6	2020	10,073	50.7
2025	2,856	14.3	2025	10,491	52.5
2030	2,968	14.8	2030	10,783	53.8
Percent change 2006-2030	27.1%	22.4%	Percent change 2006-2030	20.2%	15.7%
Annualized change 2006-2030	1.00%	0.85%	Annualized change 2006-2030	0.77%	0.61%

Obstetrics and Gynecology			Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,858	19.8	2010	1,757	9.0
2015	3,871	19.7	2015	1,815	9.2
2020	3,872	19.5	2020	1,868	9.4
2025	3,870	19.4	2025	1,918	9.6
2030	3,865	19.3	2030	1,953	9.8
Percent change 2006-2030	0.9%	-2.9%	Percent change 2006-2030	13.8%	9.6%
Annualized change 2006-2030	0.04%	-0.12%	Annualized change 2006-2030	0.54%	0.38%

Psychiatry

The baseline scenario forecast a 9.6 percent increase in the demand for psychiatrists between 2006 and 2030, which is below the rate of growth in demand predicted for non-primary care physicians, with the demand for psychiatrists predicted to increase from 6,166 physicians in 2006 to 6,758 in 2030. Adjusting for the projected population growth in the state, the demand for psychiatrists expressed in terms of a physician to population ratio was predicted to increase from 32.0 physicians per 100,000 population in 2006 to 33.7 physicians per 100,000 population in 2030.

Anesthesiology

The baseline scenario forecast an 18.6 percent increase in the demand for anesthesiologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for anesthesiologists predicted to increase from 3,695 physicians in 2006 to 4,384 in 2030. Adjusting for the projected population growth in the state, the demand for anesthesiologists expressed in terms of a physician to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 21.9 physicians per 100,000 population in 2030.

Radiology

The baseline scenario forecast an 18.5 percent increase in the demand for radiologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for radiologists predicted to increase from 3,548 physicians in 2006 to 4,384 in 2030. Adjusting for the projected population growth in the state, the demand for radiologists expressed in terms of a physician to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 21.0 physicians per 100,000 population in 2030.

Emergency Medicine

The baseline scenario forecast a 6.2 percent increase in the demand for emergency medicine physicians between 2006 and 2030, a good bit below the rate of growth in demand predicted for non-primary care physicians, with the demand for emergency medicine physicians predicted to increase from 2,712 physicians in 2006 to 2,880 in 2030. Adjusting for the projected population growth in the state, the demand for emergency medicine physicians expressed in terms of a physician to population ratio was predicted to increase slightly from 14.1 physicians per 100,000 population in 2006 to 14.4 physicians per 100,000 population in 2030.

Figure 5 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

Psychiatry			Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,287	32.3	2010	3,775	19.4
2015	6,423	32.7	2015	3,915	19.9
2020	6,549	33.0	2020	4,082	20.6
2025	6,664	33.3	2025	4,260	21.3
2030	6,758	33.7	2030	4,384	21.9
Percent change 2006-2030	9.6%	5.6%	Percent change 2006-2030	18.6%	14.3%
Annualized change 2006-2030	0.38%	0.23%	Annualized change 2006-2030	0.71%	0.56%

Radiology			Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,617	18.6	2010	2,737	14.1
2015	3,742	19.0	2015	2,773	14.1
2020	3,897	19.6	2020	2,815	14.2
2025	4,074	20.4	2025	2,854	14.3
2030	4,203	21.0	2030	2,880	14.4
Percent change 2006-2030	18.5%	14.1%	Percent change 2006-2030	6.2%	2.3%
Annualized change 2006-2030	0.71%	0.55%	Annualized change 2006-2030	0.25%	0.09%

General Surgery

The baseline scenario forecast a 17.3 percent increase in the demand for general surgeons between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for general surgeons predicted to increase from 2,683 physicians in 2006 to 3,148 in 2030. Adjusting for the projected population growth in the state, the demand for general surgeons expressed in terms of a physician to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 15.7 physicians per 100,000 population in 2030.

Ophthalmology

The baseline scenario forecast a 22.9 percent increase in the demand for ophthalmologists between 2006 and 2030, a good bit above the rate of growth in demand predicted for non-primary care physicians, with the demand for ophthalmologists predicted to increase from 1,974 physicians in 2006 to 2,427 in 2030. Adjusting for the projected population growth in the state, the demand for ophthalmologists expressed in terms of a physician to population ratio was predicted to increase from 10.2 physicians per 100,000 population in 2006 to 12.1 physicians per 100,000 population in 2030.

Otolaryngology

The baseline scenario forecast an 11.1 percent increase in the demand for otolaryngologists between 2006 and 2030, somewhat below the rate of growth in demand predicted for non-primary care physicians, with the demand for otolaryngologists predicted to increase from 828 physicians in 2006 to 920 in 2030. Adjusting for the projected population growth in the state, the demand for otolaryngologists expressed in terms of a physician to population ratio was predicted to increase slightly from 4.3 physicians per 100,000 population in 2006 to 4.6 physicians per 100,000 population in 2030.

Orthopedic Surgery

The baseline scenario forecast a 16.4 percent increase in the demand for orthopedic surgeons between 2006 and 2030, slightly above the rate of growth in demand predicted for non-primary care physicians, with the demand for orthopedic surgeons predicted to increase from 1,931 physicians in 2006 to 2,247 in 2030. Adjusting for the projected population growth in the state, the demand for orthopedic surgeons expressed in terms of a physician to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 11.2 physicians per 100,000 population in 2030.

Figure 6 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

General Surgery			Ophthalmology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,755	14.2	2010	2,026	10.4
2015	2,863	14.6	2015	2,118	10.8
2020	2,971	15.0	2020	2,228	11.2
2025	3,075	15.4	2025	2,344	11.7
2030	3,148	15.7	2030	2,427	12.1
Percent change 2006-2030	17.3%	13.0%	Percent change 2006-2030	22.9%	18.4%
Annualized change 2006-2030	0.67%	0.51%	Annualized change 2006-2030	0.86%	0.71%

Otolaryngology			Orthopedic Surgery		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	840	4.3	2010	1,969	10.1
2015	860	4.4	2015	2,032	10.3
2020	883	4.4	2020	2,107	10.6
2025	906	4.5	2025	2,188	10.9
2030	920	4.6	2030	2,247	11.2
Percent change 2006-2030	11.1%	7.0%	Percent change 2006-2030	16.4%	12.1%
Annualized change 2006-2030	0.44%	0.28%	Annualized change 2006-2030	0.63%	0.48%

Urology

The baseline scenario forecast a 22.4 percent increase in the demand for urologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for urologists predicted to increase from 937 physicians in 2006 to 1,147 in 2030. Adjusting for the projected population growth in the state, the demand for urologists expressed in terms of a physician to population ratio was predicted to increase from 4.9 physicians per 100,000 population in 2006 to 5.7 physicians per 100,000 population in 2030.

Other Surgical Subspecialties

The baseline scenario forecast an 18.3 percent increase in the demand for other surgical subspecialists between 2006 and 2030, somewhat above the rate of growth in demand predicted for non-primary care physicians, with the demand for other surgical subspecialists predicted to increase from 1,399 physicians in 2006 to 1,655 in 2030. Adjusting for the projected population growth in the state, the demand for other surgical subspecialists expressed in terms of a physician to population ratio was predicted to increase from 7.3 physicians per 100,000 population in 2006 to 8.3 physicians per 100,000 population in 2030.

Other Specialties

The baseline scenario forecast a 15.3 percent increase in the demand for other specialists between 2006 and 2030, about equal to the rate of growth in demand predicted for non-primary care physicians, with the demand for other specialists predicted to increase from 7,470 physicians in 2006 to 8,611 in 2030. Adjusting for the projected population growth in the state, the demand for other specialists expressed in terms of a physician to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 43.0 physicians per 100,000 population in 2030.

Figure 7 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	963	5.0	2010	1,440	7.4
2015	1,009	5.1	2015	1,501	7.6
2020	1,059	5.3	2020	1,562	7.9
2025	1,111	5.6	2025	1,618	8.1
2030	1,147	5.7	2030	1,655	8.3
Percent change 2006-2030	22.4%	17.9%	Percent change 2006-2030	18.3%	13.9%
Annualized change 2006-2030	0.85%	0.69%	Annualized change 2006-2030	0.70%	0.54%

Other Specialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	7,470	38.7
2010	7,642	39.3
2015	7,883	40.1
2020	8,142	41.0
2025	8,412	42.1
2030	8,611	43.0
Percent change 2006-2030	15.3%	11.0%
Annualized change 2006-2030	0.59%	0.44%

State Level Demand Scenario 2: Growing Economy

In this scenario, demand for physicians was forecast to increase by 29.5 percent between 2006 and 2030, with the demand for physicians predicted to increase from 75,489 physicians in 2006 to 97,786 in 2030. Adjusting for the projected population growth in the state, the demand for physicians expressed in terms of a physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 488.2 physicians per 100,000 population in 2030.

Figure 8 – New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	75,489	391.3
2010	78,522	403.6
2015	82,989	422.0
2020	87,930	442.9
2025	93,182	466.3
2030	97,786	488.2
Percent change 2006-2030	29.5%	24.8%
Annualized change 2006-2030	1.08%	0.93%

In this scenario, demand for primary care physicians was forecast to increase by 21.6 percent between 2006 and 2030, with the demand for primary care physicians predicted to increase from 25,289 physicians in 2006 to 30,752 in 2030. Adjusting for the projected population growth in the state, the demand for primary care physicians expressed in terms of a physician to population ratio was predicted to grow from 131.1 physicians per 100,000 population in 2006 to 153.5 physicians per 100,000 population in 2030.

In this scenario, demand for non-primary care physicians was forecast to increase by 33.5 percent between 2006 and 2030, with the demand for non-primary care physicians predicted to increase from 50,200 physicians in 2006 to 67,034 in 2030. Adjusting for the projected population growth in the state, the demand for non-primary care physicians expressed in terms of a physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 334.7 physicians per 100,000 population in 2030.

Figure 9 – New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	25,947	133.4	2010	52,575	270.3
2015	27,025	137.4	2015	55,964	284.6
2020	28,287	142.5	2020	59,643	300.4
2025	29,632	148.3	2025	63,550	318.0
2030	30,752	153.5	2030	67,034	334.7
Percent change 2006-2030	21.6%	17.1%	Percent change 2006-2030	33.5%	28.6%
Annualized change 2006-2030	0.82%	0.66%	Annualized change 2006-2030	1.21%	1.05%

Specialty-Specific Demand Forecasts

In this scenario, the demand for physicians was forecast to increase for all specialties with the exception of general pediatrics. Specialty-specific demand forecasts fell into two patterns. Almost all specialties were projected to experience growth over the entire forecast period. General pediatrics was forecast to decline in

demand through 2010, then increase for the remainder of the forecast period. In this scenario, no specialties were forecast to increase in demand at a slower pace than the population. In all specialties, the rate of growth was greater than the rate of growth of the population.

Primary Care Specialties

General/Family Medicine

The growing economy scenario forecast an 18.6 percent increase in the demand for general/family physicians between 2006 and 2030, somewhat below the level of growth in demand predicted for primary care physicians, with the demand for general/family physicians predicted to increase from 5,108 physicians in 2006 to 6,059 in 2030. Adjusting for the projected population growth in the state, the demand for general/family physicians expressed in terms of a physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 30.3 physicians per 100,000 population in 2030.

General Internal Medicine

The growing economy scenario forecast a 28.9 percent increase in the demand for general internists between 2006 and 2030, which is above the level of growth in demand predicted for primary care physicians, with the demand for general internists predicted to increase from 14,242 physicians in 2006 to 18,357 in 2030. Adjusting for the projected population growth in the state, the demand for general internists expressed in terms of a physician to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 91.7 physicians per 100,000 population in 2030.

General Pediatrics

The growing economy scenario forecast a 6.7 percent increase in the demand for general pediatricians between 2006 and 2030, which is below the level of growth in demand predicted for primary care physicians, with the demand for general pediatricians predicted to increase from 5,939 physicians in 2006 to 6,336 in 2030. Adjusting for the projected population growth in the state, the demand for general pediatricians expressed in terms of a physician to population ratio was predicted to increase from 30.8 physicians per 100,000 population in 2006 to 31.6 physicians per 100,000 population in 2030.

Figure 10 – New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	25,947	133.4	2010	5,250	27.0
2015	27,025	137.4	2015	5,447	27.7
2020	28,287	142.5	2020	5,661	28.5
2025	29,632	148.3	2025	5,883	29.4
2030	30,752	153.5	2030	6,059	30.3
Percent change 2006-2030	21.6%	17.1%	Percent change 2006-2030	18.6%	14.2%
Annualized change 2006-2030	0.82%	0.66%	Annualized change 2006-2030	0.71%	0.56%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,807	76.1	2010	5,890	30.3
2015	15,631	79.5	2015	5,947	30.2
2020	16,535	83.3	2020	6,091	30.7
2025	17,519	87.7	2025	6,230	31.2
2030	18,357	91.7	2030	6,336	31.6
Percent change 2006-2030	28.9%	24.1%	Percent change 2006-2030	6.7%	2.8%
Annualized change 2006-2030	1.06%	0.90%	Annualized change 2006-2030	0.27%	0.11%

Non-Primary Care Specialties

Cardiovascular Disease

The growing economy scenario forecast a 48.4 percent increase in the demand for cardiologists between 2006 and 2030, well above the rate of growth in demand predicted for non-primary care physicians, with the demand for cardiologists predicted to increase from 2,335 physicians in 2006 to 3,466 in 2030. Adjusting for the projected population growth in the state, the demand for cardiologists expressed in terms of a physician to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 17.3 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

The growing economy scenario forecast a 40.3 percent increase in the demand for other internal medicine subspecialists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for other internal medicine subspecialists predicted to increase from 8,974 physicians in 2006 to 12,591 in 2030. Adjusting for the projected population growth in the state, the demand for other internal medicine subspecialists expressed in terms of a physician to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 62.9 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

The growing economy scenario forecast an 8.3 percent increase in the demand for obstetricians and gynecologists between 2006 and 2030, well below the rate of growth in demand predicted for non-primary care physicians, with the demand for obstetricians and gynecologists predicted to increase from 3,832 physicians in 2006 to 4,150 in 2030. Adjusting for the projected population growth in the state, the demand for obstetricians

and gynecologists expressed in terms of a physician to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 20.7 physicians per 100,000 population in 2030.

Pathology

The growing economy scenario forecast a 32.9 percent increase in the demand for pathologists between 2006 and 2030, slightly below the rate of growth in demand predicted for non-primary care physicians, with the demand for pathologists predicted to increase from 1,716 physicians in 2006 to 2,281 in 2030. Adjusting for the projected population growth in the state, the demand for pathologists expressed in terms of a physician to population ratio was predicted to increase from 8.9 physicians per 100,000 population in 2006 to 11.4 physicians per 100,000 population in 2030.

Figure 11 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,477	12.7	2010	9,487	48.8
2015	2,702	13.7	2015	10,233	52.0
2020	2,952	14.9	2020	11,026	55.5
2025	3,229	16.2	2025	11,861	59.4
2030	3,466	17.3	2030	12,591	62.9
Percent change 2006-2030	48.4%	42.9%	Percent change 2006-2030	40.3%	35.1%
Annualized change 2006-2030	1.66%	1.50%	Annualized change 2006-2030	1.42%	1.26%

Obstetrics and Gynecology			Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,904	20.1	2010	1,803	9.3
2015	3,976	20.2	2015	1,924	9.8
2020	4,036	20.3	2020	2,045	10.3
2025	4,094	20.5	2025	2,168	10.9
2030	4,150	20.7	2030	2,281	11.4
Percent change 2006-2030	8.3%	4.3%	Percent change 2006-2030	32.9%	28.0%
Annualized change 2006-2030	0.33%	0.18%	Annualized change 2006-2030	1.19%	1.03%

Psychiatry

The growing economy scenario forecast a 28.0 percent increase in the demand for psychiatrists between 2006 and 2030, which is below the rate of growth in demand predicted for non-primary care physicians, with the demand for psychiatrists predicted to increase from 6,166 physicians in 2006 to 7,891 in 2030. Adjusting for the projected population growth in the state, the demand for psychiatrists expressed in terms of a physician to population ratio was predicted to increase from 32.0 physicians per 100,000 population in 2006 to 39.4 physicians per 100,000 population in 2030.

Anesthesiology

The growing economy scenario forecast a 38.5 percent increase in the demand for anesthesiologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for anesthesiologists predicted to increase from 3,695 physicians in 2006 to 5,119 in 2030. Adjusting for the projected population growth in the state, the demand for anesthesiologists expressed in terms

of a physician to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 25.6 physicians per 100,000 population in 2030.

Radiology

The growing economy scenario forecast a 38.3 percent increase in the demand for radiologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for radiologists predicted to increase from 3,548 physicians in 2006 to 4,908 in 2030. Adjusting for the projected population growth in the state, the demand for radiologists expressed in terms of a physician to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 24.5 physicians per 100,000 population in 2030.

Emergency Medicine

The growing economy scenario forecast a 14.0 percent increase in the demand for emergency medicine physicians between 2006 and 2030, far below the rate of growth in demand predicted for non-primary care physicians, with the demand for emergency medicine physicians predicted to increase from 2,712 physicians in 2006 to 3,092 in 2030. Adjusting for the projected population growth in the state, the demand for emergency medicine physicians expressed in terms of a physician to population ratio was predicted to increase from 14.1 physicians per 100,000 population in 2006 to 15.4 physicians per 100,000 population in 2030.

Figure 12 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

Psychiatry			Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,452	33.2	2010	3,874	19.9
2015	6,808	34.6	2015	4,149	21.1
2020	7,169	36.1	2020	4,468	22.5
2025	7,534	37.7	2025	4,816	24.1
2030	7,891	39.4	2030	5,119	25.6
Percent change 2006-2030	28.0%	23.3%	Percent change 2006-2030	38.5%	33.4%
Annualized change 2006-2030	1.03%	0.88%	Annualized change 2006-2030	1.37%	1.21%

Radiology			Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,712	19.1	2010	2,770	14.2
2015	3,966	20.2	2015	2,848	14.5
2020	4,266	21.5	2020	2,934	14.8
2025	4,606	23.1	2025	3,019	15.1
2030	4,908	24.5	2030	3,092	15.4
Percent change 2006-2030	38.3%	33.2%	Percent change 2006-2030	14.0%	9.8%
Annualized change 2006-2030	1.36%	1.20%	Annualized change 2006-2030	0.55%	0.39%

General Surgery

The growing economy scenario forecast a 37.0 percent increase in the demand for general surgeons between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for general surgeons predicted to increase from 2,683 physicians in 2006 to 3,676 in 2030. Adjusting for the projected population growth in the state, the demand for general surgeons expressed in terms

of a physician to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 18.4 physicians per 100,000 population in 2030.

Ophthalmology

The growing economy scenario forecast a 43.6 percent increase in the demand for ophthalmologists between 2006 and 2030, well above the rate of growth in demand predicted for non-primary care physicians, with the demand for ophthalmologists predicted to increase from 1,974 physicians in 2006 to 2,834 in 2030. Adjusting for the projected population growth in the state, the demand for ophthalmologists expressed in terms of a physician to population ratio was predicted to increase from 10.2 physicians per 100,000 population in 2006 to 14.1 physicians per 100,000 population in 2030.

Otolaryngology

The growing economy scenario forecast a 29.7 percent increase in the demand for otolaryngologists between 2006 and 2030, somewhat below the rate of growth in demand predicted for non-primary care physicians, with the demand for otolaryngologists predicted to increase from 828 physicians in 2006 to 1,074 in 2030. Adjusting for the projected population growth in the state, the demand for otolaryngologists expressed in terms of a physician to population ratio was predicted to increase from 4.3 physicians per 100,000 population in 2006 to 5.4 physicians per 100,000 population in 2030.

Orthopedic Surgery

The growing economy scenario forecast a 35.9 percent increase in the demand for orthopedic surgeons between 2006 and 2030, slightly above the rate of growth in demand predicted for non-primary care physicians, with the demand for orthopedic surgeons predicted to increase from 1,931 physicians in 2006 to 2,624 in 2030. Adjusting for the projected population growth in the state, the demand for orthopedic surgeons expressed in terms of a physician to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 13.1 physicians per 100,000 population in 2030.

Figure 13 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

General Surgery			Ophthalmology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,827	14.5	2010	2,079	10.7
2015	3,034	15.4	2015	2,245	11.4
2020	3,252	16.4	2020	2,439	12.3
2025	3,477	17.4	2025	2,650	13.3
2030	3,676	18.4	2030	2,834	14.1
Percent change 2006-2030	37.0%	32.0%	Percent change 2006-2030	43.6%	38.3%
Annualized change 2006-2030	1.32%	1.16%	Annualized change 2006-2030	1.52%	1.36%

Otolaryngology			Orthopedic Surgery		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	862	4.4	2010	2,021	10.4
2015	911	4.6	2015	2,154	11.0
2020	967	4.9	2020	2,306	11.6
2025	1,024	5.1	2025	2,474	12.4
2030	1,074	5.4	2030	2,624	13.1
Percent change 2006-2030	29.7%	25.0%	Percent change 2006-2030	35.9%	30.9%
Annualized change 2006-2030	1.09%	0.93%	Annualized change 2006-2030	1.29%	1.13%

Urology

The growing economy scenario forecast a 42.9 percent increase in the demand for urologists between 2006 and 2030, far above the rate of growth in demand predicted for non-primary care physicians, with the demand for urologists predicted to increase from 937 physicians in 2006 to 1,339 in 2030. Adjusting for the projected population growth in the state, the demand for urologists expressed in terms of a physician to population ratio was predicted to increase from 4.9 physicians per 100,000 population in 2006 to 6.7 physicians per 100,000 population in 2030.

Other Surgical Subspecialties

The growing economy scenario forecast a 38.1 percent increase in the demand for other surgical subspecialists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for other surgical subspecialists predicted to increase from 1,399 physicians in 2006 to 1,933 in 2030. Adjusting for the projected population growth in the state, the demand for other surgical subspecialists expressed in terms of a physician to population ratio was predicted to increase from 7.3 physicians per 100,000 population in 2006 to 9.6 physicians per 100,000 population in 2030.

Other Specialties

The growing economy scenario forecast a 34.6 percent increase in the demand for other specialists between 2006 and 2030, slightly above the rate of growth in demand predicted for non-primary care physicians, with the demand for other specialists predicted to increase from 7,470 physicians in 2006 to 10,055 in 2030. Adjusting for the projected population growth in the state, the demand for other specialists expressed in terms of a physician to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 50.2 physicians per 100,000 population in 2030.

Figure 14 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	988	5.1	2010	1,478	7.6
2015	1,069	5.4	2015	1,591	8.1
2020	1,159	5.8	2020	1,710	8.6
2025	1,256	6.3	2025	1,829	9.2
2030	1,339	6.7	2030	1,933	9.6
Percent change 2006-2030	42.9%	37.7%	Percent change 2006-2030	38.1%	33.0%
Annualized change 2006-2030	1.50%	1.34%	Annualized change 2006-2030	1.36%	1.20%

Other Specialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	7,470	38.7
2010	7,842	40.3
2015	8,355	42.5
2020	8,913	44.9
2025	9,511	47.6
2030	10,055	50.2
Percent change 2006-2030	34.6%	29.6%
Annualized change 2006-2030	1.25%	1.09%

State Level Demand Scenario 3: Universal Health Insurance by 2020

In this scenario, demand for physicians was forecast to increase by 20.3 percent between 2006 and 2030, with the demand for physicians predicted to increase from 75,489 physicians in 2006 to 90,805 in 2030. Adjusting for the projected population growth in the state, the demand for physicians expressed in terms of a physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 453.4 physicians per 100,000 population in 2030.

Figure 15 – New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	75,489	391.3
2010	78,007	401.0
2015	81,766	415.8
2020	85,917	432.7
2025	88,765	444.2
2030	90,805	453.4
Percent change 2006-2030	20.3%	15.8%
Annualized change 2006-2030	0.77%	0.61%

In this scenario, demand for primary care physicians was forecast to increase by 19.3 percent between 2006 and 2030, with the demand for primary care physicians predicted to increase from 25,289 physicians in 2006 to 30,161 in 2030. Adjusting for the projected population growth in the state, the demand for primary care physicians expressed in terms of a physician to population ratio was predicted to grow from 131.1 physicians per 100,000 population in 2006 to 150.6 physicians per 100,000 population in 2030.

In this scenario, demand for non-primary care physicians was forecast to increase by 20.8 percent between 2006 and 2030, with the demand for non-primary care physicians predicted to increase from 50,200 physicians in 2006 to 60,644 in 2030. Adjusting for the projected population growth in the state, the demand for non-primary care physicians expressed in terms of a physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 302.8 physicians per 100,000 population in 2030.

Figure 16 – New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	26,020	133.8	2010	51,988	267.2
2015	27,198	138.3	2015	54,569	277.5
2020	28,573	143.9	2020	57,344	288.8
2025	29,494	147.6	2025	59,271	296.6
2030	30,161	150.6	2030	60,644	302.8
Percent change 2006-2030	19.3%	14.9%	Percent change 2006-2030	20.8%	16.3%
Annualized change 2006-2030	0.74%	0.58%	Annualized change 2006-2030	0.79%	0.63%

Specialty-Specific Demand Forecasts

In this scenario, the demand for physicians was forecast to increase for all specialties with the exception of general pediatrics. Specialty-specific demand forecasts fell into three patterns. The majority of specialties were projected to experience growth over the entire forecast period. General pediatrics and emergency medicine were forecast to experience a period of decline in demand between 2010 and 2020, then increase for the remainder of the forecast period. Obstetrics and gynecology was forecast to experience a period of growth in demand through 2020, then decline for the remainder of the forecast period. In this scenario, emergency medicine was the only specialty forecast to increase in demand at a slower pace than the population. In all specialties, the rate of growth was greater than the rate of growth of the population.

Primary Care Specialties

General/Family Medicine

The universal health insurance by 2020 scenario forecast a 14.2 percent increase in the demand for general/family physicians between 2006 and 2030, which is below the level of growth in demand predicted for primary care physicians, with the demand for general/family physicians predicted to increase from 5,108 physicians in 2006 to 5,834 in 2030. Adjusting for the projected population growth in the state, the demand for general/family physicians expressed in terms of a physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 29.1 physicians per 100,000 population in 2030.

General Internal Medicine

The universal health insurance by 2020 scenario forecast a 27.4 percent increase in the demand for general internists between 2006 and 2030, which is above the level of growth in demand predicted for primary care physicians, with the demand for general internists predicted to increase from 14,242 physicians in 2006 to 18,144 in 2030. Adjusting for the projected population growth in the state, the demand for general internists

expressed in terms of a physician to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 90.6 physicians per 100,000 population in 2030.

General Pediatrics

The universal health insurance by 2020 scenario forecast a 4.1 percent increase in the demand for general pediatricians between 2006 and 2030, well below the level of growth in demand predicted for primary care physicians, with the demand for general pediatricians predicted to decrease from 5,939 physicians in 2006 to 5,899 in 2010, then increase to 6,183 in 2030. Adjusting for the projected population growth in the state, the demand for general pediatricians expressed in terms of a physician to population ratio was predicted to decrease from 30.8 physicians per 100,000 population in 2006 to 30.3 physicians per 100,000 population in 2010, then increase to 30.9 physicians per 100,000 population in 2030.

Figure 17 – New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	26,020	133.8	2010	5,238	26.9
2015	27,198	138.3	2015	5,419	27.6
2020	28,573	143.9	2020	5,615	28.3
2025	29,494	147.6	2025	5,749	28.8
2030	30,161	150.6	2030	5,834	29.1
Percent change 2006-2030	19.3%	14.9%	Percent change 2006-2030	14.2%	10.0%
Annualized change 2006-2030	0.74%	0.58%	Annualized change 2006-2030	0.56%	0.40%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,883	76.5	2010	5,899	30.3
2015	15,812	80.4	2015	5,967	30.3
2020	16,835	84.8	2020	6,122	30.8
2025	17,574	87.9	2025	6,171	30.9
2030	18,144	90.6	2030	6,183	30.9
Percent change 2006-2030	27.4%	22.7%	Percent change 2006-2030	4.1%	0.3%
Annualized change 2006-2030	1.01%	0.86%	Annualized change 2006-2030	0.17%	0.01%

Non-Primary Care Specialties

Cardiovascular Disease

The universal health insurance by 2020 scenario forecast a 32.6 percent increase in the demand for cardiologists between 2006 and 2030, well above the rate of growth in demand predicted for non-primary care physicians, with the demand for cardiologists predicted to increase from 2,335 physicians in 2006 to 3,095 in 2030. Adjusting for the projected population growth in the state, the demand for cardiologists expressed in terms of a physician to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 15.5 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

The universal health insurance by 2020 scenario forecast a 27.1 percent increase in the demand for other internal medicine subspecialists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for other internal medicine subspecialists predicted to increase from 8,974 physicians in 2006 to 11,402 in 2030. Adjusting for the projected population growth in the state, the demand for other internal medicine subspecialists expressed in terms of a physician to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 56.9 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

The universal health insurance by 2020 scenario forecast a 5.7 percent increase in the demand for obstetricians and gynecologists between 2006 and 2030, well below the rate of growth in demand predicted for non-primary care physicians, with the demand for obstetricians and gynecologists predicted to increase from 3,832 physicians in 2006 to 4,059 in 2020, then decrease to 4,051 in 2030. Adjusting for the projected population growth in the state, the demand for obstetricians and gynecologists expressed in terms of a physician to population ratio was predicted to increase from 19.9 physicians per 100,000 population in 2006 to 20.4 physicians per 100,000 population in 2020, then decrease to 20.2 physicians per 100,000 population in 2030.

Pathology

The universal health insurance by 2020 scenario forecast a 20.7 percent increase in the demand for pathologists between 2006 and 2030, nearly equal to the rate of growth in demand predicted for non-primary care physicians, with the demand for pathologists predicted to increase from 1,716 physicians in 2006 to 2,071 in 2030. Adjusting for the projected population growth in the state, the demand for pathologists expressed in terms of a physician to population ratio was predicted to increase from 8.9 physicians per 100,000 population in 2006 to 10.3 physicians per 100,000 population in 2030.

Figure 18 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,335	12.1
2010	2,443	12.6
2015	2,619	13.3
2020	2,813	14.2
2025	2,978	14.9
2030	3,095	15.5
Percent change 2006-2030	32.6%	27.7%
Annualized change 2006-2030	1.18%	1.02%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	8,974	46.5
2010	9,394	48.3
2015	10,008	50.9
2020	10,651	53.6
2025	11,093	55.5
2030	11,402	56.9
Percent change 2006-2030	27.1%	22.4%
Annualized change 2006-2030	1.00%	0.84%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,832	19.9
2010	3,910	20.1
2015	3,990	20.3
2020	4,059	20.4
2025	4,057	20.3
2030	4,051	20.2
Percent change 2006-2030	5.7%	1.8%
Annualized change 2006-2030	0.23%	0.08%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,716	8.9
2010	1,787	9.2
2015	1,885	9.6
2020	1,981	10.0
2025	2,034	10.2
2030	2,071	10.3
Percent change 2006-2030	20.7%	16.3%
Annualized change 2006-2030	0.79%	0.63%

Psychiatry

The universal health insurance by 2020 scenario forecast a 14.9 percent increase in the demand for psychiatrists between 2006 and 2030, which is below the rate of growth in demand predicted for non-primary care physicians, with the demand for psychiatrists predicted to increase from 6,166 physicians in 2006 to 7,084 in 2030. Adjusting for the projected population growth in the state, the demand for psychiatrists expressed in terms of a physician to population ratio was predicted to increase from 32.0 physicians per 100,000 population in 2006 to 35.4 physicians per 100,000 population in 2030.

Anesthesiology

The universal health insurance by 2020 scenario forecast a 25.1 percent increase in the demand for anesthesiologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for anesthesiologists predicted to increase from 3,695 physicians in 2006 to 4,624 in 2030. Adjusting for the projected population growth in the state, the demand for anesthesiologists expressed in terms of a physician to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 23.1 physicians per 100,000 population in 2030.

Radiology

The universal health insurance by 2020 scenario forecast a 25.6 percent increase in the demand for radiologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for radiologists predicted to increase from 3,548 physicians in 2006 to 4,457 in 2030. Adjusting for the projected population growth in the state, the demand for radiologists expressed in terms of a physician to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 22.3 physicians per 100,000 population in 2030.

Emergency Medicine

The universal health insurance by 2020 scenario forecast a 1.1 percent increase in the demand for emergency medicine physicians between 2006 and 2030, far below the rate of growth in demand predicted for non-primary care physicians, with the demand for emergency medicine physicians predicted to decrease from 2,712 physicians in 2006 to 2,680 in 2020, then increase to 2,742 in 2030. Adjusting for the projected population growth in the state, the demand for emergency medicine physicians expressed in terms of a physician to population ratio was predicted to decrease from 14.1 physicians per 100,000 population in 2006 to 13.5 physicians per 100,000 population in 2020, then increase to 13.7 physicians per 100,000 population in 2030.

Figure 19 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

Psychiatry			Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,372	32.8	2010	3,833	19.7
2015	6,621	33.7	2015	4,051	20.6
2020	6,865	34.6	2020	4,305	21.7
2025	6,986	35.0	2025	4,493	22.5
2030	7,084	35.4	2030	4,624	23.1
Percent change 2006-2030	14.9%	10.6%	Percent change 2006-2030	25.1%	20.5%
Annualized change 2006-2030	0.58%	0.42%	Annualized change 2006-2030	0.94%	0.78%

Radiology			Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,678	18.9	2010	2,699	13.9
2015	3,886	19.8	2015	2,687	13.7
2020	4,132	20.8	2020	2,680	13.5
2025	4,320	21.6	2025	2,717	13.6
2030	4,457	22.3	2030	2,742	13.7
Percent change 2006-2030	25.6%	21.0%	Percent change 2006-2030	1.1%	-2.6%
Annualized change 2006-2030	0.95%	0.80%	Annualized change 2006-2030	0.05%	-0.11%

General Surgery

The universal health insurance by 2020 scenario forecast a 23.7 percent increase in the demand for general surgeons between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for general surgeons predicted to increase from 2,683 physicians in 2006 to 3,318 in 2030. Adjusting for the projected population growth in the state, the demand for general surgeons expressed in terms of a physician to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 16.6 physicians per 100,000 population in 2030.

Ophthalmology

The universal health insurance by 2020 scenario forecast a 25.5 percent increase in the demand for ophthalmologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for ophthalmologists predicted to increase from 1,974 physicians in 2006 to 2,477 in 2030. Adjusting for the projected population growth in the state, the demand for ophthalmologists expressed in terms of a physician to population ratio was predicted to increase from 10.2 physicians per 100,000 population in 2006 to 12.4 physicians per 100,000 population in 2030.

Otolaryngology

The universal health insurance by 2020 scenario forecast a 23.8 percent increase in the demand for otolaryngologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for otolaryngologists predicted to increase from 828 physicians in 2006 to 958 in 2030. Adjusting for the projected population growth in the state, the demand for otolaryngologists expressed in terms of a physician to population ratio was predicted to increase from 4.3 physicians per 100,000 population in 2006 to 4.8 physicians per 100,000 population in 2030.

Orthopedic Surgery

The universal health insurance by 2020 scenario forecast a 23.8 percent increase in the demand for orthopedic surgeons between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for orthopedic surgeons predicted to increase from 1,931 physicians in 2006 to 2,390 in 2030. Adjusting for the projected population growth in the state, the demand for orthopedic surgeons expressed in terms of a physician to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 11.9 physicians per 100,000 population in 2030.

Figure 20 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

General Surgery			Ophthalmology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,797	14.4	2010	2,038	10.5
2015	2,962	15.1	2015	2,146	10.9
2020	3,132	15.8	2020	2,274	11.5
2025	3,241	16.2	2025	2,393	12.0
2030	3,318	16.6	2030	2,477	12.4
Percent change 2006-2030	23.7%	19.1%	Percent change 2006-2030	25.5%	20.9%
Annualized change 2006-2030	0.89%	0.73%	Annualized change 2006-2030	0.95%	0.79%

Otolaryngology			Orthopedic Surgery		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	850	4.4	2010	2,004	10.3
2015	883	4.5	2015	2,114	10.8
2020	919	4.6	2020	2,241	11.3
2025	943	4.7	2025	2,327	11.6
2030	958	4.8	2030	2,390	11.9
Percent change 2006-2030	15.7%	11.4%	Percent change 2006-2030	23.8%	19.2%
Annualized change 2006-2030	0.61%	0.45%	Annualized change 2006-2030	0.89%	0.73%

Urology

The universal health insurance by 2020 scenario forecast a 29.2 percent increase in the demand for urologists between 2006 and 2030, which is well above the rate of growth in demand predicted for non-primary care physicians, with the demand for urologists predicted to increase from 937 physicians in 2006 to 1,211 in 2030. Adjusting for the projected population growth in the state, the demand for urologists expressed in terms of a physician to population ratio was predicted to increase from 4.9 physicians per 100,000 population in 2006 to 6.0 physicians per 100,000 population in 2030.

Other Surgical Subspecialties

The universal health insurance by 2020 scenario forecast a 24.2 percent increase in the demand for other surgical subspecialists between 2006 and 2030, somewhat above the rate of growth in demand predicted for non-primary care physicians, with the demand for other surgical subspecialists predicted to increase from 1,399 physicians in 2006 to 1,738 in 2030. Adjusting for the projected population growth in the state, the demand for other surgical subspecialists expressed in terms of a physician to population ratio was predicted to increase from 7.3 physicians per 100,000 population in 2006 to 8.7 physicians per 100,000 population in 2030.

Other Specialties

The universal health insurance by 2020 scenario forecast a 20.8 percent increase in the demand for other specialists between 2006 and 2030, equal to the rate of growth in demand predicted for non-primary care physicians, with the demand for other specialists predicted to increase from 7,470 physicians in 2006 to 9,026 in 2030. Adjusting for the projected population growth in the state, the demand for other specialists expressed in terms of a physician to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 45.1 physicians per 100,000 population in 2030.

Figure 21 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

Urology			Other Surgical Specialties		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	937	4.9	2006	1,399	7.3
2010	978	5.0	2010	1,460	7.5
2015	1,045	5.3	2015	1,549	7.9
2020	1,118	5.6	2020	1,640	8.3
2025	1,173	5.9	2025	1,699	8.5
2030	1,211	6.0	2030	1,738	8.7
Percent change 2006-2030	29.2%	24.4%	Percent change 2006-2030	24.2%	19.6%
Annualized change 2006-2030	1.07%	0.92%	Annualized change 2006-2030	0.91%	0.75%

Other Specialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	7,470	38.7
2010	7,745	39.8
2015	8,125	41.3
2020	8,534	43.0
2025	8,817	44.1
2030	9,026	45.1
Percent change 2006-2030	20.8%	16.4%
Annualized change 2006-2030	0.79%	0.63%

State Level Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

In this scenario, demand for physicians was forecast to increase by 10.9 percent between 2006 and 2030, with the demand for physicians predicted to increase from 75,489 physicians in 2006 to 83,692 in 2030. Adjusting for the projected population growth in the state, the demand for physicians expressed in terms of a physician to population ratio was predicted to grow from 391.3 physicians per 100,000 population in 2006 to 417.9 physicians per 100,000 population in 2030.

Figure 22 – New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	75,489	391.3
2010	76,529	393.4
2015	78,312	398.2
2020	80,326	404.6
2025	82,396	412.3
2030	83,692	417.9
Percent change 2006-2030	10.9%	6.8%
Annualized change 2006-2030	0.43%	0.27%

In this scenario, demand for primary care physicians was forecast to increase by 13.3 percent between 2006 and 2030, with the demand for primary care physicians predicted to increase from 25,289 physicians in 2006 to 28,640 in 2030. Adjusting for the projected population growth in the state, the demand for primary care physicians expressed in terms of a physician to population ratio was predicted to grow from 131.1 physicians per 100,000 population in 2006 to 143.0 physicians per 100,000 population in 2030.

In this scenario, demand for non-primary care physicians was forecast to increase by 9.7 percent between 2006 and 2030, with the demand for non-primary care physicians predicted to increase from 50,200 physicians in 2006 to 55,052 in 2030. Adjusting for the projected population growth in the state, the demand for non-primary care physicians expressed in terms of a physician to population ratio was predicted to grow from 260.2 physicians per 100,000 population in 2006 to 274.9 physicians per 100,000 population in 2030.

Figure 23 – New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	25,289	131.1	2006	50,200	260.2
2010	25,641	131.8	2010	50,888	261.6
2015	26,313	133.8	2015	51,999	264.4
2020	27,137	136.7	2020	53,189	267.9
2025	28,009	140.2	2025	54,387	272.2
2030	28,640	143.0	2030	55,052	274.9
Percent change 2006-2030	13.3%	9.1%	Percent change 2006-2030	9.7%	5.6%
Annualized change 2006-2030	0.52%	0.36%	Annualized change 2006-2030	0.39%	0.23%

Specialty-Specific Demand Forecasts

In this scenario, the demand for physicians was forecast to increase for all specialties with the exception of general pediatrics. Specialty-specific demand forecasts fell into four patterns. The majority of specialties were

projected to experience growth over the entire forecast period. Emergency medicine was forecast to experience a period of growth in demand through 2025, then decrease for the remainder of the forecast period. General pediatrics was forecast to experience a period of decline in demand through 2015, then increase for the remainder of the forecast period. Obstetrics and gynecology was forecast to experience a decline in demand throughout the forecast period. In this scenario, general pediatrics, obstetrics and gynecology, and emergency medicine were the only specialties forecast to increase in demand at a slower pace than the population. In all specialties, the rate of growth was greater than the rate of growth of the population.

Primary Care Specialties

General/Family Medicine

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 10.5 percent increase in the demand for general/family physicians between 2006 and 2030, which is below the level of growth in demand predicted for primary care physicians, with the demand for general/family physicians predicted to increase from 5,108 physicians in 2006 to 5,643 in 2030. Adjusting for the projected population growth in the state, the demand for general/family physicians expressed in terms of a physician to population ratio was predicted to grow from 26.5 physicians per 100,000 population in 2006 to 28.2 physicians per 100,000 population in 2030.

General Internal Medicine

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 20.0 percent increase in the demand for general internists between 2006 and 2030, which is above the level of growth in demand predicted for primary care physicians, with the demand for general internists predicted to increase from 14,242 physicians in 2006 to 17,096 in 2030. Adjusting for the projected population growth in the state, the demand for general internists expressed in terms of a physician to population ratio was predicted to grow from 73.8 physicians per 100,000 population in 2006 to 85.4 physicians per 100,000 population in 2030.

General Pediatrics

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 0.6 percent decrease in the demand for general pediatricians between 2006 and 2030, unlike the growth in demand predicted for primary care physicians, with the demand for general pediatricians predicted to decrease from 5,939 physicians in 2006 to 5,790 in 2015, then increase to 5,901 in 2030. Adjusting for the projected population growth in the state, the demand for general pediatricians expressed in terms of a physician to population ratio was predicted to decrease from 30.8 physicians per 100,000 population in 2006 to 29.4 physicians per 100,000 population in 2010, then increase to 29.5 physicians per 100,000 population in 2030.

Figure 24 – New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	25,289	131.1	2006	5,108	26.5
2010	25,641	131.8	2010	5,188	26.7
2015	26,313	133.8	2015	5,304	27.0
2020	27,137	136.7	2020	5,431	27.4
2025	28,009	140.2	2025	5,561	27.8
2030	28,640	143.0	2030	5,643	28.2
Percent change 2006-2030	13.3%	9.1%	Percent change 2006-2030	10.5%	6.4%
Annualized change 2006-2030	0.52%	0.36%	Annualized change 2006-2030	0.42%	0.26%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	14,242	73.8	2006	5,939	30.8
2010	14,632	75.2	2010	5,821	29.9
2015	15,219	77.4	2015	5,790	29.4
2020	15,863	79.9	2020	5,843	29.4
2025	16,559	82.9	2025	5,889	29.5
2030	17,096	85.4	2030	5,901	29.5
Percent change 2006-2030	20.0%	15.6%	Percent change 2006-2030	-0.6%	-4.3%
Annualized change 2006-2030	0.76%	0.61%	Annualized change 2006-2030	-0.03%	-0.18%

Non-Primary Care Specialties

Cardiovascular Disease

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 20.8 percent increase in the demand for cardiologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for cardiologists predicted to increase from 2,335 physicians in 2006 to 2,820 in 2030. Adjusting for the projected population growth in the state, the demand for cardiologists expressed in terms of a physician to population ratio was predicted to increase from 12.1 physicians per 100,000 population in 2006 to 14.1 physicians per 100,000 population in 2030.

Other Internal Medicine Subspecialties

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 14.2 percent increase in the demand for other internal medicine subspecialists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for other internal medicine subspecialists predicted to increase from 8,974 physicians in 2006 to 10,244 in 2030. Adjusting for the projected population growth in the state, the demand for other internal medicine subspecialists expressed in terms of a physician to population ratio was predicted to increase from 46.5 physicians per 100,000 population in 2006 to 51.1 physicians per 100,000 population in 2030.

Obstetrics and Gynecology

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 4.2 percent decrease in the demand for obstetricians and gynecologists between 2006 and 2030, unlike the growth in demand predicted for non-primary care physicians, with the demand for obstetricians and gynecologists predicted to decrease from 3,832 physicians in 2006 to 3,672 in 2030. Adjusting for the projected population

growth in the state, the demand for obstetricians and gynecologists expressed in terms of a physician to population ratio was predicted to decrease from 19.9 physicians per 100,000 population in 2006 to 18.3 physicians per 100,000 population in 2030.

Pathology

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast an 8.1 percent increase in the demand for pathologists between 2006 and 2030, which is below the rate of growth in demand predicted for non-primary care physicians, with the demand for pathologists predicted to increase from 1,716 physicians in 2006 to 1,855 in 2030. Adjusting for the projected population growth in the state, the demand for pathologists expressed in terms of a physician to population ratio was predicted to increase from 8.9 physicians per 100,000 population in 2006 to 9.3 physicians per 100,000 population in 2030.

Figure 25 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,335	12.1	2006	8,974	46.5
2010	2,393	12.3	2010	9,166	47.1
2015	2,500	12.7	2015	9,471	48.2
2020	2,617	13.2	2020	9,776	49.2
2025	2,742	13.7	2025	10,074	50.4
2030	2,820	14.1	2030	10,244	51.1
Percent change 2006-2030	20.8%	16.3%	Percent change 2006-2030	14.2%	9.9%
Annualized change 2006-2030	0.79%	0.63%	Annualized change 2006-2030	0.55%	0.40%

Obstetrics and Gynecology			Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,832	19.9	2006	1,716	8.9
2010	3,825	19.7	2010	1,742	9.0
2015	3,797	19.3	2015	1,780	9.1
2020	3,758	18.9	2020	1,813	9.1
2025	3,716	18.6	2025	1,842	9.2
2030	3,672	18.3	2030	1,855	9.3
Percent change 2006-2030	-4.2%	-7.7%	Percent change 2006-2030	8.1%	4.1%
Annualized change 2006-2030	-0.18%	-0.33%	Annualized change 2006-2030	0.33%	0.17%

Psychiatry

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 4.1 percent increase in the demand for psychiatrists between 2006 and 2030, which is below the rate of growth in demand predicted for non-primary care physicians, with the demand for psychiatrists predicted to increase from 6,166 physicians in 2006 to 6,420 in 2030. Adjusting for the projected population growth in the state, the demand for psychiatrists expressed in terms of a physician to population ratio was predicted to increase from 32.0 physicians per 100,000 population in 2006 to 32.1 physicians per 100,000 population in 2030.

Anesthesiology

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 12.7 percent increase in the demand for anesthesiologists between 2006 and 2030, somewhat above the rate of growth in demand predicted for non-primary care physicians, with the demand for anesthesiologists predicted to

increase from 3,695 physicians in 2006 to 4,165 in 2030. Adjusting for the projected population growth in the state, the demand for anesthesiologists expressed in terms of a physician to population ratio was predicted to increase from 19.2 physicians per 100,000 population in 2006 to 20.8 physicians per 100,000 population in 2030.

Radiology

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 12.5 percent increase in the demand for radiologists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for radiologists predicted to increase from 3,548 physicians in 2006 to 3,993 in 2030. Adjusting for the projected population growth in the state, the demand for radiologists expressed in terms of a physician to population ratio was predicted to increase from 18.4 physicians per 100,000 population in 2006 to 19.9 physicians per 100,000 population in 2030.

Emergency Medicine

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 0.9 percent increase in the demand for emergency medicine physicians between 2006 and 2030, unlike the growth in demand predicted for non-primary care physicians, with the demand for emergency medicine physicians predicted to increase from 2,712 physicians in 2006 to 2,740 in 2025, then decrease to 2,736 in 2030. Adjusting for the projected population growth in the state, the demand for emergency medicine physicians expressed in terms of a physician to population ratio was predicted to decrease from 14.1 physicians per 100,000 population in 2006 to 13.7 physicians per 100,000 population in 2030.

Figure 26 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

Psychiatry			Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	6,166	32.0	2006	3,695	19.2
2010	6,233	32.0	2010	3,743	19.2
2015	6,301	32.0	2015	3,840	19.5
2020	6,356	32.0	2020	3,962	20.0
2025	6,399	32.0	2025	4,090	20.5
2030	6,420	32.1	2030	4,165	20.8
Percent change 2006-2030	4.1%	0.3%	Percent change 2006-2030	12.7%	8.6%
Annualized change 2006-2030	0.17%	0.01%	Annualized change 2006-2030	0.50%	0.34%

Radiology			Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,548	18.4	2006	2,712	14.1
2010	3,586	18.4	2010	2,714	13.9
2015	3,671	18.7	2015	2,720	13.8
2020	3,782	19.0	2020	2,732	13.8
2025	3,912	19.6	2025	2,740	13.7
2030	3,993	19.9	2030	2,736	13.7
Percent change 2006-2030	12.5%	8.4%	Percent change 2006-2030	0.9%	-2.8%
Annualized change 2006-2030	0.49%	0.34%	Annualized change 2006-2030	0.04%	-0.12%

General Surgery

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast an 11.5 percent increase in the demand for general surgeons between 2006 and 2030, somewhat above the rate of growth in demand predicted for non-primary care physicians, with the demand for general surgeons predicted to increase from 2,683 physicians in 2006 to 2,991 in 2030. Adjusting for the projected population growth in the state, the demand for general surgeons expressed in terms of a physician to population ratio was predicted to increase from 13.9 physicians per 100,000 population in 2006 to 14.9 physicians per 100,000 population in 2030.

Ophthalmology

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 16.8 percent increase in the demand for ophthalmologists between 2006 and 2030, well above the rate of growth in demand predicted for non-primary care physicians, with the demand for ophthalmologists predicted to increase from 1,974 physicians in 2006 to 2,306 in 2030. Adjusting for the projected population growth in the state, the demand for ophthalmologists expressed in terms of a physician to population ratio was predicted to increase from 10.2 physicians per 100,000 population in 2006 to 11.5 physicians per 100,000 population in 2030.

Otolaryngology

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 5.6 percent increase in the demand for otolaryngologists between 2006 and 2030, which is below the rate of growth in demand predicted for non-primary care physicians, with the demand for otolaryngologists predicted to increase from 828 physicians in 2006 to 874 in 2030. Adjusting for the projected population growth in the state, the demand for otolaryngologists expressed in terms of a physician to population ratio was predicted to increase from 4.3 physicians per 100,000 population in 2006 to 4.4 physicians per 100,000 population in 2030.

Orthopedic Surgery

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 10.5 percent increase in the demand for orthopedic surgeons between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for orthopedic surgeons predicted to increase from 1,931 physicians in 2006 to 2,135 in 2030. Adjusting for the projected population growth in the state, the demand for orthopedic surgeons expressed in terms of a physician to population ratio was predicted to increase from 10.0 physicians per 100,000 population in 2006 to 10.7 physicians per 100,000 population in 2030.

Figure 27 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

General Surgery			Ophthalmology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,683	13.9	2006	1,974	10.2
2010	2,732	14.0	2010	2,009	10.3
2015	2,808	14.3	2015	2,078	10.6
2020	2,883	14.5	2020	2,162	10.9
2025	2,953	14.8	2025	2,251	11.3
2030	2,991	14.9	2030	2,306	11.5
Percent change 2006-2030	11.5%	7.4%	Percent change 2006-2030	16.8%	12.5%
Annualized change 2006-2030	0.45%	0.30%	Annualized change 2006-2030	0.65%	0.49%

Otolaryngology			Orthopedic Surgery		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	828	4.3	2006	1,931	10.0
2010	833	4.3	2010	1,952	10.0
2015	844	4.3	2015	1,993	10.1
2020	857	4.3	2020	2,045	10.3
2025	870	4.4	2025	2,101	10.5
2030	874	4.4	2030	2,135	10.7
Percent change 2006-2030	5.6%	1.7%	Percent change 2006-2030	10.5%	6.5%
Annualized change 2006-2030	0.23%	0.07%	Annualized change 2006-2030	0.42%	0.26%

Urology

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 16.3 percent increase in the demand for urologists between 2006 and 2030, well above the rate of growth in demand predicted for non-primary care physicians, with the demand for urologists predicted to increase from 937 physicians in 2006 to 1,090 in 2030. Adjusting for the projected population growth in the state, the demand for urologists expressed in terms of a physician to population ratio was predicted to increase from 4.9 physicians per 100,000 population in 2006 to 5.4 physicians per 100,000 population in 2030.

Other Surgical Subspecialties

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 12.4 percent increase in the demand for other surgical subspecialists between 2006 and 2030, which is above the rate of growth in demand predicted for non-primary care physicians, with the demand for other surgical subspecialists predicted to increase from 1,399 physicians in 2006 to 1,572 in 2030. Adjusting for the projected population growth in the state, the demand for other surgical subspecialists expressed in terms of a physician to population ratio was predicted to increase from 7.3 physicians per 100,000 population in 2006 to 7.8 physicians per 100,000 population in 2030.

Other Specialties

The partial elimination of unnecessary/marginally-beneficial/duplicative services scenario forecast a 9.5 percent increase in the demand for other specialists between 2006 and 2030, slightly below the rate of growth in demand predicted for non-primary care physicians, with the demand for other specialists predicted to increase from 7,470 physicians in 2006 to 8,180 in 2030. Adjusting for the projected population growth in the state, the demand for other specialists expressed in terms of a physician to population ratio was predicted to increase from 38.7 physicians per 100,000 population in 2006 to 40.8 physicians per 100,000 population in 2030.

Figure 28 – New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006-2030

Urology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	937	4.9
2010	955	4.9
2015	990	5.0
2020	1,028	5.2
2025	1,067	5.3
2030	1,090	5.4
Percent change 2006-2030	16.3%	12.0%
Annualized change 2006-2030	0.63%	0.47%

Other Surgical Specialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,399	7.3
2010	1,428	7.3
2015	1,472	7.5
2020	1,516	7.6
2025	1,554	7.8
2030	1,572	7.8
Percent change 2006-2030	12.4%	8.2%
Annualized change 2006-2030	0.49%	0.33%

Other Specialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	7,470	38.7
2010	7,577	38.9
2015	7,733	39.3
2020	7,902	39.8
2025	8,077	40.4
2030	8,180	40.8
Percent change 2006-2030	9.5%	5.5%
Annualized change 2006-2030	0.38%	0.22%

Chapter 9: Relationship between Physician Supply and Demand in New York 2030

In order to clearly indicate the relationship between the projected physician supply and demand in New York in 2030, in this section, the results of the supply and demand projections are compared in a side-by-side fashion. For each of the three supply scenarios, the projected gap between the growth in the supply of physicians and growth in the demand for physicians is presented in the aggregate and by specialty for each demand scenario.

Gaps between supply and demand under each scenario are presented. The gaps between supply and demand are presented as percentages. These percentages are calculated as follows:

$$[(Supply_{2030} - Demand_{2030}) \div Demand_{2030}] * 100$$

where $Supply_{2030}$ = the number of physicians forecast to be active in 2030; and
 $Demand_{2030}$ = the number of active physicians necessary to meet forecast demand in 2030

For data presented in *tables*, *negative gaps* indicate that demand for physicians in a particular specialty or group of specialties was forecast to grow at a quicker pace than the supply of physicians. *Positive gaps* indicate that the physician supply in a particular specialty or group of specialties was forecast to grow at a quicker pace than the demand for physicians.

For data presented in the *text of this section*, where demand for physicians in a particular specialty or group of specialties was forecast to grow at a quicker pace than the supply of physicians, the gap is referred to as a *shortage*. Where demand for physicians in a particular specialty or group of specialties was forecast to grow at a slower pace than the supply of physicians, the gap is referred to as a *surplus*.

Each supply scenario and variation of scenario is compared to each demand scenario in order to evaluate the potential gap between the changes in physician supply and demand through 2030 in the state. Also presented in the tables in this section is the number of physicians that each percentage represents.

State Level Supply Scenario 1: Baseline

In the aggregate, physician demand was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 3,647 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 4.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 14,844 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 15.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 7,963 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 8.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 750 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 0.9 percent in 2030.

Figure 1 – Projected Difference Between Physician Supply and Demand in New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
All Physicians	-3,647	-4.2%	-14,844	-15.2%	-7,863	-8.7%	-750	-0.9%

In the aggregate, primary care physician demand was projected to grow at a faster pace than the baseline primary care physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced primary care physician supply growth by 2,151 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the baseline demand scenario amounted to 7.5 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced primary care physician supply growth by 4,263 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the growing economy scenario amounted to 13.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced primary care supply growth by 3,672 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the universal health insurance by 2020 scenario amounted to 12.2 percent in 2030.

In the aggregate, non-primary care physician demand was projected to grow at a faster pace than the baseline non-primary care physician supply forecast in three demand scenarios and projected to grow at a slower pace than the baseline non-primary care physician supply forecast in the other scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced non-primary care physician supply growth by 1,496 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the baseline demand scenario amounted to 2.6 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced non-primary care physician supply growth by 10,581 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 15.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced non-primary care supply growth by 4,191 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 6.9 percent in 2020.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), non-primary care physician supply growth outpaced non-primary care physician demand growth by 1,401 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenarios amounted to 2.5 percent in 2030.

Figure 2 – Projected Difference Between Physician Supply and Demand in New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Primary Care	-2,151	-7.5%	-4,263	-13.9%	-3,672	-12.2%	-2,151	-7.5%
Non-Primary Care	-1,496	-2.6%	-10,581	-15.8%	-4,191	-6.9%	1,401	2.5%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

General/Family Medicine

Demand for general/family medicine physicians was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 595 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 10.5 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,011 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the health insurance scenario amounted to 16.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 786 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 13.5 percent in 2020.

General Internal Medicine

Demand for general internists was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 2,286 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 13.4 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 3,546 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 19.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 3,333 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 18.4 percent in 2030.

General Pediatrics

Demand for general pediatricians was projected to grow at a slower pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand change by 730 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 12.4 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 294 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 4.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand change by 448 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 7.2 percent in 2030.

Figure 3 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Primary Care (Overall)	-2,151	-7.5%	-4,263	-13.9%	-3,672	-12.2%	-2,151	-7.5%
General/Family Medicine	-595	-10.5%	-1,011	-16.7%	-786	-13.5%	-595	-10.5%
General Internal Medicine	-2,286	-13.4%	-3,546	-19.3%	-3,333	-18.4%	-2,286	-13.4%
General Pediatrics	730	12.4%	294	4.6%	448	7.2%	730	12.4%

Non-Primary Care Specialties

Cardiovascular Diseases

Demand for cardiologists was projected to grow at a faster pace than the baseline physician supply forecast in two demand scenarios and projected to grow at a slower pace than the baseline physician supply forecast in two scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 91 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 3.1 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 407 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 11.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 37 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 1.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 239 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.5 percent in 2030.

Other Internal Medicine Subspecialties

Demand for other internal medicine subspecialists was projected to grow at a slower pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 2,106 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 19.5 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 298 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 2.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,487 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 13.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 2,645 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 25.8 percent in 2030.

Obstetrics and Gynecology

Demand for obstetrics and gynecology physicians was projected to grow at a faster pace than the baseline physician supply forecast in two demand scenarios and projected to grow at a slower pace than the baseline physician supply forecast in two scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 162 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 4.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 123 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 3.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 24 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 0.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand change by 355 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 9.7 percent in 2030.

Pathology

Demand for pathologists was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 667 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 34.1 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 994 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 43.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 785 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 37.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 569 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 30.7 percent in 2030.

Figure 4 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Cardiovascular Diseases	91	3.1%	-407	-11.7%	-37	-1.2%	239	8.5%
Other Internal Medicine Subspecialties	2,106	19.5%	298	2.4%	1,487	13.0%	2,645	25.8%
Obstetrics and Gynecology	162	4.2%	-123	-3.0%	-24	-0.6%	355	9.7%
Pathology	-667	-34.1%	-994	-43.6%	-785	-37.9%	-569	-30.7%

Psychiatry

Demand for psychiatrists was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 1,520 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 22.5 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 2,653 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 33.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 1,846 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 26.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 1,182 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 18.4 percent in 2030.

Anesthesiology

Demand for anesthesiologists was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 299 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 6.8 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 1,034 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 20.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 538 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 11.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 80 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 1.9 percent in 2030.

Radiology

Demand for radiologists was projected to grow at a faster pace than the baseline physician supply forecast in two demand scenarios and projected to grow at a slower pace than the baseline physician supply forecast in two scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 18 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 0.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 687 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 14.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 236 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 5.3 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 228 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 5.7 percent in 2030.

Emergency Medicine

Demand for emergency medicine physicians was projected to grow at a slower pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,385 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 48.1 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,172 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 37.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,523 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 55.5 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,529 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 55.9 percent in 2030.

Figure 5 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Psychiatry	-1,520	-22.5%	-2,653	-33.6%	-1,846	-26.1%	-1,182	-18.4%
Anesthesiology	-299	-6.8%	-1,034	-20.2%	-538	-11.6%	-80	-1.9%
Radiology	18	0.4%	-687	-14.0%	-236	-5.3%	228	5.7%
Emergency Medicine	1,385	48.1%	1,172	37.9%	1,523	55.5%	1,529	55.9%

General Surgery

Demand for general surgeons was projected to grow at a faster pace than the baseline physician supply forecast in three demand scenarios and projected to grow at a slower pace than the baseline physician supply forecast in one scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 2 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 0.1 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 530 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 14.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 172 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 5.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 156 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 5.2 percent in 2030.

Ophthalmology

Demand for ophthalmologists was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 826 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 34.1 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,233 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 43.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 877 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 35.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 705 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 30.6 percent in 2030.

Otolaryngology

Demand for otolaryngologists was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 142 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 15.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 296 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 27.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 180 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 18.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 96 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 11.0 percent in 2030.

Orthopedic Surgery

Demand for orthopedic surgeons was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 115 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 5.1 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 492 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 18.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 258 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 10.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 3 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 0.1 percent in 2030.

Figure 6 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
General Surgery	-2	-0.1%	-530	-14.4%	-172	-5.2%	156	5.2%
Ophthalmology	-826	-34.1%	-1,233	-43.5%	-877	-35.4%	-705	-30.6%
Otolaryngology	-142	-15.4%	-296	-27.6%	-180	-18.8%	-96	-11.0%
Orthopedic Surgery	-115	-5.1%	-492	-18.8%	-258	-10.8%	-3	-0.1%

Urology

Demand for urologists was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 386 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 33.6 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 578 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 43.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 449 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 37.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 328 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 30.1 percent in 2030.

Other Surgical Subspecialties

Demand for other surgical subspecialists was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 440 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 26.6 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 717 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 37.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 523 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 30.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 357 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 22.7 percent in 2030.

Other Specialties

Demand for other specialists was projected to grow at a faster pace than the baseline physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 861 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 10.0 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 2,305 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 22.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 1,276 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 14.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 430 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 5.3 percent in 2030.

Figure 7 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Urology	-386	-33.6%	-578	-43.2%	-449	-37.1%	-328	-30.1%
Other Surgical Subspecialties	-440	-26.6%	-717	-37.1%	-523	-30.1%	-357	-22.7%
Other Specialties	-861	-10.0%	-2,305	-22.9%	-1,276	-14.1%	-430	-5.3%

State Level Supply Scenario 2: NP/PA High and Lower Growth

NP/PA High Growth

In the aggregate, physician demand was projected to grow at a slower pace than the NP/PA high growth physician supply forecast in three demand scenarios and was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 5,630 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 6.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 5,568 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 5.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,413 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 1.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 8,527 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 10.2 percent in 2030.

NP/PA Lower Growth

In the aggregate, physician demand was projected to grow at a slower pace than the NP/PA lower growth physician supply forecast in two demand scenarios and was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 797 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 0.9 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 10,400 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 10.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 3,419 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 3.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 3,694 physicians by 2030. Expressed as a percentage of the

number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 4.4 percent in 2030.

Figure 8 – Projected Difference Between Physician Supply and Demand in New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
NP/PA High Growth								
<i>All Physicians</i>	5,630	6.5%	-5,568	-5.7%	1,413	1.6%	8,527	10.2%
NP/PA Lower Growth								
<i>All Physicians</i>	797	0.9%	-10,400	-10.6%	-3,419	-3.8%	3,694	4.4%

NP/PA High Growth

In the aggregate, primary care physician demand was projected to grow at a slower pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced primary care physician demand growth by 2,281 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 8.0 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), supply growth outpaced primary care physician demand growth by 169 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 0.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced primary care demand growth by 760 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 2.5 percent in 2030.

In the aggregate, non-primary care physician demand was projected to grow at a slower pace than the NP/PA high growth physician supply forecast in three demand scenarios and projected to grow at a faster pace than the NP/PA high growth physician supply forecast in the other scenario.

In the baseline demand scenario (demand scenario 1), supply growth outpaced non-primary care physician demand growth by 3,348 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 5.8 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced non-primary care physician supply growth by 5,736 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 8.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced non-primary care demand growth by 653 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 1.1 percent in 2020.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), non-primary care physician supply growth outpaced non-primary care physician demand growth by 6,246 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenarios amounted to 11.3 percent in 2030.

NP/PA Lower Growth

In the aggregate, primary care physician demand was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced primary care physician supply growth by 8 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to less than 0.1% percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced primary care physician supply growth by 2,120 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 6.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced primary care supply growth by 1,529 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 5.1 percent in 2030.

In the aggregate, non-primary care physician demand was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in two demand scenarios and projected to grow at a slower pace than the NP/PA lower growth physician supply forecast in two scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced non-primary care physician demand growth by 805 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 1.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced non-primary care physician supply growth by 8,280 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 12.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced non-primary care supply growth by 1,890 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 3.1 percent in 2020.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), non-primary care physician supply growth outpaced non-primary care physician demand growth by 3,702 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenarios amounted to 6.7 percent in 2030.

Figure 9 – Projected Difference Between Physician Supply and Demand in New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
NP/PA High Growth								
Primary Care	2,281	8.0%	169	0.5%	760	2.5%	2,281	8.0%
Non-Primary Care	3,348	5.8%	-5,736	-8.6%	653	1.1%	6,246	11.3%
NP/PA Lower Growth								
Primary Care	-8	0.0%	-2,120	-6.9%	-1,529	-5.1%	-8	0.0%
Non-Primary Care	805	1.4%	-8,280	-12.4%	-1,890	-3.1%	3,702	6.7%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

NP/PA High Growth
General/Family Medicine

Demand for general/family medicine physicians was projected to grow at a slower pace than the NP/PA high growth physician supply forecast in three demand scenarios and was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in the other demand scenario.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 250 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 4.4 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 167 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the health insurance scenario amounted to 2.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 58 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 1.0 percent in 2020.

General Internal Medicine

Demand for general internists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in two demand scenarios and projected to grow at a slower pace than the NP/PA high growth physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 193 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 1.1 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 1,068 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 5.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 855 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 4.7 percent in 2030.

General Pediatrics

Demand for general pediatricians was projected to grow at a slower pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand change by 1,839 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 31.2 percent in 2030.

Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,404 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 22.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,557 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 25.2 percent in 2030.

NP/PA Lower Growth

General/Family Medicine

Demand for general/family medicine physicians was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 187 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 3.3 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 603 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the health insurance scenario amounted to 9.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 378 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 6.5 percent in 2020.

General Internal Medicine

Demand for general internists was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 1,087 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 6.4 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 2,348 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 12.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 2,135 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 11.8 percent in 2030.

General Pediatrics

Demand for general pediatricians was projected to grow at a slower pace than the NP/PA lower growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand change by 1,266 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 21.5 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 831 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 13.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 984 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 15.9 percent in 2030.

Figure 10 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
NP/PA High Growth								
Primary Care (Overall)	2,281	8.0%	169	0.5%	760	2.5%	2,281	8.0%
General/Family Medicine	250	4.4%	-167	-2.8%	58	1.0%	250	4.4%
General Internal Medicine	193	1.1%	-1,068	-5.8%	-855	-4.7%	193	1.1%
General Pediatrics	1,839	31.2%	1,404	22.2%	1,557	25.2%	1,839	31.2%
NP/PA Lower Growth								
Primary Care (Overall)	-8	0.0%	-2,120	-6.9%	-1,529	-5.1%	-8	0.0%
General/Family Medicine	-187	-3.3%	-603	-9.9%	-378	-6.5%	-187	-3.3%
General Internal Medicine	-1,087	-6.4%	-2,348	-12.8%	-2,135	-11.8%	-1,087	-6.4%
General Pediatrics	1,266	21.5%	831	13.1%	984	15.9%	1,266	21.5%

Non-Primary Care Specialties

NP/PA High Growth Cardiovascular Diseases

Demand for cardiologists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in one demand scenario and projected to grow at a slower pace than the NP/PA high growth physician supply forecast in three demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 353 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 11.9 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 145 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 4.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 226 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 7.3 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 501 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 17.8 percent in 2030.

Other Internal Medicine Subspecialties

Demand for other internal medicine subspecialists was projected to grow at a slower pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 3,212 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 29.8 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,404 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 11.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 2,593 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 22.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 3,751 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 36.6 percent in 2030.

Obstetrics and Gynecology

Demand for obstetrics and gynecology physicians was projected to grow at a slower pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 508 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 13.1 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 223 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 5.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 321 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 7.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand change by 701 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 19.1 percent in 2030.

Pathology

Demand for pathologists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 556 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 28.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 884 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 38.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 675 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 32.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 459 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 24.7 percent in 2030.

NP/PA Lower Growth

Cardiovascular Diseases

Demand for cardiologists was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in one demand scenario and projected to grow at a slower pace than the NP/PA high growth physician supply forecast in three demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 215 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 7.3 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 283 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 8.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 88 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 2.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 364 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 12.9 percent in 2030.

Other Internal Medicine Subspecialties

Demand for other internal medicine subspecialists was projected to grow at a slower pace than the NP/PA lower growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 2,631 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 24.4 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 823 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 6.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 2,013 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 17.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 3,170 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 31.0 percent in 2030.

Obstetrics and Gynecology

Demand for obstetrics and gynecology physicians was projected to grow at a slower pace than the NP/PA lower growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 326 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 8.4 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 41 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 1.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 140 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 3.5 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand change by 520 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 14.1 percent in 2030.

Pathology

Demand for pathologists was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 614 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 31.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 942 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 41.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 733 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 35.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 517 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 27.9 percent in 2030.

Figure 11 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
NP/PA High Growth								
Cardiology	353	11.9%	-145	-4.2%	226	7.3%	501	17.8%
Other Internal Medicine Subspecialties	3,212	29.8%	1,404	11.1%	2,593	22.7%	3,751	36.6%
Obstetrics and Gynecology	508	13.1%	223	5.4%	321	7.9%	701	19.1%
Pathology	-556	-28.5%	-884	-38.8%	-675	-32.6%	-459	-24.7%
NP/PA Lower Growth								
Cardiology	215	7.3%	-283	-8.2%	88	2.8%	364	12.9%
Other Internal Medicine Subspecialties	2,631	24.4%	823	6.5%	2,013	17.7%	3,170	31.0%
Obstetrics and Gynecology	326	8.4%	41	1.0%	140	3.5%	520	14.1%
Pathology	-614	-31.5%	-942	-41.3%	-733	-35.4%	-517	-27.9%

NP/PA High Growth Psychiatry

Demand for psychiatrists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 1,070 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 15.8 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 2,204 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 27.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 1,396 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 19.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 732 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 11.4 percent in 2030.

Anesthesiology

Demand for anesthesiologists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in two demand scenarios and was projected to grow at a slower pace than the NP/PA high growth physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 52 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 1.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 683 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 13.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 188 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 4.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 271 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 6.5 percent in 2030.

Radiology

Demand for radiologists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in one demand scenario and projected to grow at a slower pace than the NP/PA high growth physician supply forecast in three scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 380 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 9.0 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 325 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 6.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 236 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 2.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 590 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 14.8 percent in 2030.

Emergency Medicine

Demand for emergency medicine physicians was projected to grow at a slower pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,751 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 60.8 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,538 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 49.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,889 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 68.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,895 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 69.2 percent in 2030.

NP/PA Lower Growth

Psychiatry

Demand for psychiatrists was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 1,306 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 19.3 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 2,440 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 30.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 1,632 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 23.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 968 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 15.1 percent in 2030.

Anesthesiology

Demand for anesthesiologists was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in three demand scenarios and was projected to grow at a slower pace than the NP/PA lower growth physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 132 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 3.0 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 868 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 372 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 8.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 87 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.1 percent in 2030.

Radiology

Demand for radiologists was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in two demand scenarios and projected to grow at a slower pace than the NP/PA lower growth physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 190 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 4.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 515 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 10.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 64 physicians through 2030. Expressed as a percentage of the number of physicians required to meet

the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 1.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 400 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 10.0 percent in 2030.

Emergency Medicine

Demand for emergency medicine physicians was projected to grow at a slower pace than the NP/PA lower growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,558 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 54.1 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,346 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 43.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,696 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 61.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,702 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 62.2 percent in 2030.

Figure 12 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
NP/PA High Growth								
Psychiatry	-1,070	-15.8%	-2,204	-27.9%	-1,396	-19.7%	-732	-11.4%
Anesthesiology	52	1.2%	-683	-13.4%	-188	-4.1%	271	6.5%
Radiology	380	9.0%	-325	-6.6%	126	2.8%	590	14.8%
Emergency Medicine	1,751	60.8%	1,538	49.7%	1,889	68.9%	1,895	69.2%
NP/PA Lower Growth								
Psychiatry	-1,306	-19.3%	-2,440	-30.9%	-1,632	-23.0%	-968	-15.1%
Anesthesiology	-132	-3.0%	-868	-16.9%	-372	-8.0%	87	2.1%
Radiology	190	4.5%	-515	-10.5%	-64	-1.4%	400	10.0%
Emergency Medicine	1,558	54.1%	1,346	43.5%	1,696	61.9%	1,702	62.2%

NP/PA High Growth

General Surgery

Demand for general surgeons was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in one demand scenario and projected to grow at a slower pace than the NP/PA high growth physician supply forecast in three demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 268 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 8.5 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 260 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 7.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 98 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 3.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 426 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 14.2 percent in 2030.

Ophthalmology

Demand for ophthalmologists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 689 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 28.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,096 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 38.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 739 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 29.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 568 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 24.6 percent in 2030.

Otolaryngology

Demand for otolaryngologists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 75 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 8.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 229 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 21.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 113 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 11.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 29 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 3.3 percent in 2030.

Orthopedic Surgery

Demand for orthopedic surgeons was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in two demand scenarios and was project to grow at a slower pace than the NP/PA high growth physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 68 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 3.0 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 309 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 11.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 76 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 3.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 180 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.4 percent in 2030.

NP/PA Lower Growth

General Surgery

Demand for general surgeons was projected to grow at a faster pace than the NP/PA low growth physician supply forecast in two demand scenarios and projected to grow at a slower pace than the NP/PA low growth physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 126 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 4.0 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 402 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 10.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 44 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 1.3 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 284 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 9.5 percent in 2030.

Ophthalmology

Demand for ophthalmologists was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 761 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 31.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,168 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 41.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 812 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 32.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 640 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 27.8 percent in 2030.

Otolaryngology

Demand for otolaryngologists was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 110 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 12.0 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 264 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 24.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 148 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 15.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 64 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 7.3 percent in 2030.

Orthopedic Surgery

Demand for orthopedic surgeons was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in three demand scenarios and was project to grow at a slower pace than the NP/PA high growth physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 28 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 1.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 405 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 15.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 172 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 7.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 84 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 3.9 percent in 2030.

Figure 13 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
NP/PA High Growth								
General Surgery	268	8.5%	-260	-7.1%	98	3.0%	426	14.2%
Ophthalmology	-689	-28.4%	-1,096	-38.7%	-739	-29.8%	-568	-24.6%
Otolaryngology	-75	-8.2%	-229	-21.4%	-113	-11.8%	-29	-3.3%
Orthopedic Surgery	68	3.0%	-309	-11.8%	-76	-3.2%	180	8.4%
NP/PA Lower Growth								
General Surgery	126	4.0%	-402	-10.9%	-44	-1.3%	284	9.5%
Ophthalmology	-761	-31.4%	-1,168	-41.2%	-812	-32.8%	-640	-27.8%
Otolaryngology	-110	-12.0%	-264	-24.6%	-148	-15.4%	-64	-7.3%
Orthopedic Surgery	-28	-1.3%	-405	-15.4%	-172	-7.2%	84	3.9%

NP/PA High Growth

Urology

Demand for urologists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 320 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 27.9 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 513 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 38.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 384 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 31.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 263 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 24.1 percent in 2030.

Other Surgical Subspecialties

Demand for other surgical subspecialists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 336 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 20.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 613 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 31.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 418 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 24.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 253 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 16.1 percent in 2030.

Other Specialties

Demand for other specialists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in three demand scenarios and was projected to grow at a slower pace than the NP/PA high growth physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 196 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 2.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 1,640 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 611 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 6.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 235 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.9 percent in 2030.

NP/PA Lower Growth

Urology

Demand for urologists was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 355 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 30.9 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 547 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 40.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 418 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 34.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 297 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 27.3 percent in 2030.

Other Surgical Subspecialties

Demand for other surgical subspecialists was projected to grow at a faster pace than the NP/PA lower growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 390 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 23.6 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 668 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 34.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 473 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 27.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 297 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 27.3 percent in 2030.

Other Specialties

Demand for other specialists was projected to grow at a faster pace than the NP/PA high growth physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 545 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 6.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 1,989 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 19.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 960 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 10.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 114 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 1.4 percent in 2030.

Figure 14 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
NP/PA High Growth								
Urology	-320	-27.9%	-513	-38.3%	-384	-31.7%	-263	-24.1%
Other Surgical Subspecialties	-336	-20.3%	-613	-31.7%	-418	-24.1%	-253	-16.1%
Other Specialties	-196	-2.3%	-1,640	-16.3%	-611	-6.8%	235	2.9%
NP/PA Lower Growth								
Urology	-355	-30.9%	-547	-40.8%	-418	-34.6%	-297	-27.3%
Other Surgical Subspecialties	-390	-23.6%	-668	-34.6%	-473	-27.2%	-308	-19.6%
Other Specialties	-545	-6.3%	-1,989	-19.8%	-960	-10.6%	-114	-1.4%

State Level Supply Scenario 3a: Increased Retention of Physicians

Increased Retention: 33% Primary Care/67% Non-Primary Care Mix

In the aggregate, physician demand was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in three demand scenarios and was projected to grow at a slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 1,647 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the baseline demand scenario amounted to 1.9 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 12,844 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the growing economy scenario amounted to 13.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 5,863 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the universal health insurance by 2020 scenario amounted to 6.5 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,250 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **surplus** predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 1.5 percent in 2030.

Increased Retention: 25% Primary Care/75% Non-Primary Care Mix

In the aggregate, physician demand was projected to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios and was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 1,647 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the baseline demand scenario amounted to 1.9 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 12,844 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the growing economy scenario amounted to 13.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 5,863 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the universal health insurance by 2020 scenario amounted to 6.5 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,250 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 1.5 percent in 2030.

Increased Retention: 20% Primary Care/80% Non-Primary Care Mix

In the aggregate, physician demand was projected to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios and was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 1,647 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 1.9 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 12,844 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 13.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 5,863 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 6.5 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,250 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 1.5 percent in 2030.

Figure 15 – Projected Difference Between Physician Supply and Demand in New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-1,647	-1.9%	-12,844	-13.1%	-5,863	-6.5%	1,250	1.5%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-1,647	-1.9%	-12,844	-13.1%	-5,863	-6.5%	1,250	1.5%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-1,647	-1.9%	-12,844	-13.1%	-5,863	-6.5%	1,250	1.5%

Increased Retention: 33% Primary Care/67% Non-Primary Care Mix

In the aggregate, primary care physician demand was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced primary care physician supply growth by 1,485 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 5.2 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced primary care physician supply growth by 3,597 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 11.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced primary care supply growth by 3,006 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 10.0 percent in 2030.

In the aggregate, non-primary care physician demand was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in three demand scenarios and projected to grow at a slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in the other scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced non-primary care physician supply growth by 162 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 0.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced non-primary care physician supply growth by 9,247 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 13.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced non-primary care supply growth by 2,857 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 4.7 percent in 2020.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), non-primary care physician supply growth outpaced non-primary care physician demand growth by 2,735 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand

for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenarios amounted to 5.0 percent in 2030.

Increased Retention: 25% Primary Care/75% Non-Primary Care Mix

In the aggregate, primary care physician demand was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced primary care physician supply growth by 1,651 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to less than 5.8% percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced primary care physician supply growth by 3,763 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 12.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced primary care supply growth by 3,172 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 10.5 percent in 2030.

In the aggregate, non-primary care physician demand was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in two scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced non-primary care physician demand growth by 4 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to less than 0.1 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced non-primary care physician supply growth by 9,081 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 13.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced non-primary care supply growth by 2,691 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 4.4 percent in 2020.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), non-primary care physician supply growth outpaced non-primary care physician demand growth by 2,901 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenarios amounted to 5.3 percent in 2030.

Increased Retention: 20% Primary Care/80% Non-Primary Care Mix

In the aggregate, primary care physician demand was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced primary care physician supply growth by 1,751 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to less than 6.1% percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced primary care physician supply growth by 3,863 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 12.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced primary care supply growth by 3,272 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 10.8 percent in 2030.

In the aggregate, non-primary care physician demand was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in two scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced non-primary care physician demand growth by 104 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 0.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced non-primary care physician supply growth by 8,981 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 13.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced non-primary care supply growth by 2,591 physicians through 2030. Expressed as a percentage of the number of physicians

required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 4.3 percent in 2020.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), non-primary care physician supply growth outpaced non-primary care physician demand growth by 3,001 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenarios amounted to 5.5 percent in 2030.

Figure 16 – Projected Difference Between Physician Supply and Demand in New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
Primary Care	-1,485	-5.2%	-3,597	-11.7%	-3,006	-10.0%	-1,485	-5.2%
Non-Primary Care	-162	-0.3%	-9,247	-13.8%	-2,857	-4.7%	2,735	5.0%
25% Primary Care/75% Non-Primary Care								
Primary Care	-1,651	-5.8%	-3,763	-12.2%	-3,172	-10.5%	-1,651	-5.8%
Non-Primary Care	4	0.0%	-9,081	-13.5%	-2,691	-4.4%	2,901	5.3%
20% Primary Care/80% Non-Primary Care								
Primary Care	-1,751	-6.1%	-3,863	-12.6%	-3,272	-10.8%	-1,751	-6.1%
Non-Primary Care	104	0.2%	-8,981	-13.4%	-2,591	-4.3%	3,001	5.5%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Increased Retention: 33% Primary Care/67% Non-Primary Care Mix
General/Family Medicine

Demand for general/family medicine physicians was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 468 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 8.3 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 884 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the health insurance scenario amounted to 14.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 659 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 11.3 percent in 2020.

General Internal Medicine

Demand for general internists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 1,913 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 11.2 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 3,174 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 17.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 2,961 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 16.3 percent in 2030.

General Pediatrics

Demand for general pediatricians was projected to grow at a slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand change by 896 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 15.2 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 461 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 7.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 614 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 9.9 percent in 2030.

Increased Retention: 25% Primary Care/75% Non-Primary Care Mix
General/Family Medicine

Demand for general/family medicine physicians was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 500 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 8.9 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 916 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the health insurance scenario amounted to 15.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 691 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 11.8 percent in 2020.

General Internal Medicine

Demand for general internists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 2,006 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 11.7 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 3,267 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 17.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 3,054 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 16.8 percent in 2030.

General Pediatrics

Demand for general pediatricians was projected to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand change by 855 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 14.5 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 420 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 6.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 573 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 9.3 percent in 2030.

Increased Retention: 20% Primary Care/80% Non-Primary Care Mix **General/Family Medicine**

Demand for general/family medicine physicians was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 1,751 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 6.1 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 935 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the health insurance scenario amounted to 15.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 710 physicians through 2030. Expressed as a percentage of the number of physicians required to

meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 12.2 percent in 2020.

General Internal Medicine

Demand for general internists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 2,062 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 12.1 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 3,323 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 18.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 3,110 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 17.1 percent in 2030.

General Pediatrics

Demand for general pediatricians was projected to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand change by 830 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 14.1 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 395 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 6.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 548 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 8.9 percent in 2030.

Figure 17 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-1,485	-5.2%	-3,597	-11.7%	-3,006	-10.0%	-1,485	-5.2%
General/Family Medicine	-468	-8.3%	-884	-14.6%	-659	-11.3%	-468	-8.3%
General Internal Medicine	-1,913	-11.2%	-3,174	-17.3%	-2,961	-16.3%	-1,913	-11.2%
General Pediatrics	896	15.2%	461	7.3%	614	9.9%	896	15.2%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-1,651	-5.8%	-3,763	-12.2%	-3,172	-10.5%	-1,651	-5.8%
General/Family Medicine	-500	-8.9%	-916	-15.1%	-691	-11.8%	-500	-8.9%
General Internal Medicine	-2,006	-11.7%	-3,267	-17.8%	-3,054	-16.8%	-2,006	-11.7%
General Pediatrics	855	14.5%	420	6.6%	573	9.3%	855	14.5%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-1,751	-6.1%	-3,863	-12.6%	-3,272	-10.8%	-1,751	-6.1%
General/Family Medicine	-519	-9.2%	-935	-15.4%	-710	-12.2%	-519	-9.2%
General Internal Medicine	-2,062	-12.1%	-3,323	-18.1%	-3,110	-17.1%	-2,062	-12.1%
General Pediatrics	830	14.1%	395	6.2%	548	8.9%	830	14.1%

Non-Primary Care Specialties

Increased Retention: 33% Primary Care/67% Non-Primary Care Mix Cardiovascular Diseases

Demand for cardiologists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in one demand scenario and projected to grow at a slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in three demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 163 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 5.5 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 335 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 9.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 36 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 1.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 311 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 11.0 percent in 2030.

Other Internal Medicine Subspecialties

Demand for other internal medicine subspecialists was projected to grow at a slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 2,411 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 22.4 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 602 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 4.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,792 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 15.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 2,950 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 28.8 percent in 2030.

Obstetrics and Gynecology

Demand for obstetrics and gynecology physicians was projected to grow at a slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in three demand scenarios and was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in the other demand scenario.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 257 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 6.7 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 28 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 0.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 71 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 1.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand change by 451 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 12.3 percent in 2030.

Pathology

Demand for pathologists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 636 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 32.6 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 964 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 42.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 755 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 36.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 539 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 29.0 percent in 2030.

Increased Retention: 25% Primary Care/75% Non-Primary Care Mix

Cardiovascular Diseases

Demand for cardiologists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in one demand scenario and projected to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in three demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 172 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 5.8 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 326 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 9.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 45 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 1.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 320 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 11.4 percent in 2030.

Other Internal Medicine Subspecialties

Demand for other internal medicine subspecialists was projected to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 2,448 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 22.7 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 640 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 5.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,830 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 16.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 2,988 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 29.2 percent in 2030.

Obstetrics and Gynecology

Demand for obstetrics and gynecology physicians was projected to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in three demand scenarios

and was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 269 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 7.0 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 16 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 0.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 83 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 2.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand change by 462 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 12.6 percent in 2030.

Pathology

Demand for pathologists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 633 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 32.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 960 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 42.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 751 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 36.3 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 535 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 28.8 percent in 2030.

Increased Retention: 20% Primary Care/80% Non-Primary Care Mix
Cardiovascular Diseases

Demand for cardiologists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in one demand scenario and projected to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in three demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 177 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 6.0 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 320 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 9.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 50 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 1.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 326 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 11.5 percent in 2030.

Other Internal Medicine Subspecialties

Demand for other internal medicine subspecialists was projected to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 2,471 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 22.9 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 663 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 5.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,852 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 16.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 3,010 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 29.4 percent in 2030.

Obstetrics and Gynecology

Demand for obstetrics and gynecology physicians was projected to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in three demand scenarios and was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 276 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 7.1 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 9 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 0.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 90 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 2.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand change by 470 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 12.8 percent in 2030.

Pathology

Demand for pathologists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 630 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 32.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 958 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 42.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 749 physicians through 2030. Expressed as a percentage of the number of physicians required to

meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 36.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 533 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 28.7 percent in 2030.

Figure 18 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
Cardiology	163	5.5%	-335	-9.7%	36	1.2%	311	11.0%
Other Internal Medicine Subspecialties	2,411	22.4%	602	4.8%	1,792	15.7%	2,950	28.8%
Obstetrics and Gynecology	257	6.7%	-28	-0.7%	71	1.7%	451	12.3%
Pathology	-636	-32.6%	-964	-42.3%	-755	-36.4%	-539	-29.0%
25% Primary Care/75% Non-Primary Care								
Cardiology	172	5.8%	-326	-9.4%	45	1.4%	320	11.4%
Other Internal Medicine Subspecialties	2,448	22.7%	640	5.1%	1,830	16.0%	2,988	29.2%
Obstetrics and Gynecology	269	7.0%	-16	-0.4%	83	2.0%	462	12.6%
Pathology	-633	-32.4%	-960	-42.1%	-751	-36.3%	-535	-28.8%
20% Primary Care/80% Non-Primary Care								
Cardiology	177	6.0%	-320	-9.2%	50	1.6%	326	11.5%
Other Internal Medicine Subspecialties	2,471	22.9%	663	5.3%	1,852	16.2%	3,010	29.4%
Obstetrics and Gynecology	276	7.1%	-9	-0.2%	90	2.2%	470	12.8%
Pathology	-630	-32.3%	-958	-42.0%	-749	-36.1%	-533	-28.7%

Increased Retention: 33% Primary Care/67% Non-Primary Care Mix Psychiatry

Demand for psychiatrists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 1,396 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 20.7 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 2,529 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 32.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 1,722 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 24.3 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 1,058 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 16.5 percent in 2030.

Anesthesiology

Demand for anesthesiologists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in three demand scenarios and was projected to grow at a slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in the other demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 202 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 4.6 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 937 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 18.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 442 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 9.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 328 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.2 percent in 2030.

Radiology

Demand for radiologists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in two scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 117 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 2.8 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 587 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 12.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 136 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 3.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 328 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.2 percent in 2030.

Emergency Medicine

Demand for emergency medicine physicians was projected to grow at a slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,485 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 51.6 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,273 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 41.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,623 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 59.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,629 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 59.6 percent in 2030.

Increased Retention: 25% Primary Care/75% Non-Primary Care Mix

Psychiatry

Demand for psychiatrists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 1,381 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 20.4 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 2,514 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 31.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 1,707 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 24.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 1,043 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 16.2 percent in 2030.

Anesthesiology

Demand for anesthesiologists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in three demand scenarios and was projected to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 190 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 4.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 925 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 18.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 430 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 9.3 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 29 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 0.7 percent in 2030.

Radiology

Demand for radiologists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 130 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 3.1 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 575 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 11.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 124 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 2.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 340 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.5 percent in 2030.

Emergency Medicine

Demand for emergency medicine physicians was projected to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,498 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 52.0 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,286 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 41.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,636 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 59.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,642 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 60.0 percent in 2030.

Increased Retention: 20% Primary Care/80% Non-Primary Care Mix

Psychiatry

Demand for psychiatrists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 1,371 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 20.3 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 2,505 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 31.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 1,697 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 24.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 1,033 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 16.1 percent in 2030.

Anesthesiology

Demand for anesthesiologists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in three demand scenarios and was projected to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 183 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 4.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 918 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 17.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 423 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 9.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 36 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 0.9 percent in 2030.

Radiology

Demand for radiologists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 137 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 3.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 568 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 11.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 116 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 2.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 348 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.7 percent in 2030.

Emergency Medicine

Demand for emergency medicine physicians was projected to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,505 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 52.3 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,293 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 41.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,644 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 59.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,649 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 60.3 percent in 2030.

Figure 19 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
Psychiatry	-1,396	-20.7%	-2,529	-32.1%	-1,722	-24.3%	-1,058	-16.5%
Anesthesiology	-202	-4.6%	-937	-18.3%	-442	-9.6%	17	0.4%
Radiology	117	2.8%	-587	-12.0%	-136	-3.1%	328	8.2%
Emergency Medicine	1,485	51.6%	1,273	41.2%	1,623	59.2%	1,629	59.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-1,381	-20.4%	-2,514	-31.9%	-1,707	-24.1%	-1,043	-16.2%
Anesthesiology	-190	-4.3%	-925	-18.1%	-430	-9.3%	29	0.7%
Radiology	130	3.1%	-575	-11.7%	-124	-2.8%	340	8.5%
Emergency Medicine	1,498	52.0%	1,286	41.6%	1,636	59.7%	1,642	60.0%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-1,371	-20.3%	-2,505	-31.7%	-1,697	-24.0%	-1,033	-16.1%
Anesthesiology	-183	-4.2%	-918	-17.9%	-423	-9.1%	36	0.9%
Radiology	137	3.3%	-568	-11.6%	-116	-2.6%	348	8.7%
Emergency Medicine	1,505	52.3%	1,293	41.8%	1,644	59.9%	1,649	60.3%

Increased Retention: 33% Primary Care/67% Non-Primary Care Mix General Surgery

Demand for general surgeons was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a

slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 73 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 2.3 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 455 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 12.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 98 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 2.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 230 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 7.7 percent in 2030.

Ophthalmology

Demand for ophthalmologists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 789 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 32.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,196 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 42.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 839 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 33.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 667 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 28.9 percent in 2030.

Otolaryngology

Demand for otolaryngologists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 124 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 13.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 278 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 25.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 161 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 16.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 78 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.9 percent in 2030.

Orthopedic Surgery

Demand for orthopedic surgeons was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in three demand scenarios and was project to grow at a slower pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in the other demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 65 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 2.9 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 442 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 208 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 8.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 47 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.2 percent in 2030.

Increased Retention: 25% Primary Care/75% Non-Primary Care Mix
General Surgery

Demand for general surgeons was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 82 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 2.6 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 446 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 12.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 88 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 2.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 239 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.0 percent in 2030.

Ophthalmology

Demand for ophthalmologists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 784 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 32.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,191 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 42.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 834 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 33.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 663 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 28.7 percent in 2030.

Otolaryngology

Demand for otolaryngologists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 121 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 13.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 276 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 25.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 159 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 16.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 75 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.6 percent in 2030.

Orthopedic Surgery

Demand for orthopedic surgeons was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in three demand scenarios and was project to grow at a slower pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 59 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 2.6 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 436 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 159 physicians through 2030. Expressed as a percentage of the number of physicians required to

meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 8.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 54 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.5 percent in 2030.

Increased Retention: 20% Primary Care/80% Non-Primary Care Mix

General Surgery

Demand for general surgeons was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 87 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 2.8 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 441 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 12.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 83 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 2.5 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 245 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.2 percent in 2030.

Ophthalmology

Demand for ophthalmologists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 781 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 32.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,188 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 41.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 831 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 33.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 660 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 28.6 percent in 2030.

Otolaryngology

Demand for otolaryngologists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 120 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 13.0 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 274 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 25.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 158 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 16.5 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 74 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 8.4 percent in 2030.

Orthopedic Surgery

Demand for orthopedic surgeons was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in three demand scenarios and was project to grow at a slower pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 55 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 2.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 432 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 198 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 8.3 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 57 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.7 percent in 2030.

Figure 20 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
General Surgery	73	2.3%	-455	-12.4%	-98	-2.9%	230	7.7%
Ophthalmology	-789	-32.5%	-1,196	-42.2%	-839	-33.9%	-667	-28.9%
Otolaryngology	-124	-13.4%	-278	-25.9%	-161	-16.8%	-78	-8.9%
Orthopedic Surgery	-65	-2.9%	-442	-16.8%	-208	-8.7%	47	2.2%
25% Primary Care/75% Non-Primary Care								
General Surgery	82	2.6%	-446	-12.1%	-88	-2.7%	239	8.0%
Ophthalmology	-784	-32.3%	-1,191	-42.0%	-834	-33.7%	-663	-28.7%
Otolaryngology	-121	-13.2%	-276	-25.6%	-159	-16.6%	-75	-8.6%
Orthopedic Surgery	-59	-2.6%	-436	-16.6%	-202	-8.4%	54	2.5%
20% Primary Care/80% Non-Primary Care								
General Surgery	87	2.8%	-441	-12.0%	-83	-2.5%	245	8.2%
Ophthalmology	-781	-32.2%	-1,188	-41.9%	-831	-33.6%	-660	-28.6%
Otolaryngology	-120	-13.0%	-274	-25.5%	-158	-16.5%	-74	-8.4%
Orthopedic Surgery	-55	-2.4%	-432	-16.5%	-198	-8.3%	57	2.7%

Increased Retention: 33% Primary Care/67% Non-Primary Care Mix

Urology

Demand for urologists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 368 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 32.1 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 560 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 41.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 431 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 35.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 310 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 28.5 percent in 2030.

Other Surgical Subspecialties

Demand for other surgical subspecialists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 411 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 24.8 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 689 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 35.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 494 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 28.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 328 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 20.9 percent in 2030.

Other Specialties

Demand for other specialists was projected to grow at a faster pace than the increased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 678 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 7.9 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 2,122 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 21.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 1,093 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 12.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 247 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 3.0 percent in 2030.

Increased Retention: 25% Primary Care/75% Non-Primary Care Mix

Urology

Demand for urologists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 366 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 31.9 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 558 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 41.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 429 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 35.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 308 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 28.3 percent in 2030.

Other Surgical Subspecialties

Demand for other surgical subspecialists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 408 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 24.6 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 685 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 35.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 490 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 28.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 325 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 20.7 percent in 2030.

Other Specialties

Demand for other specialists was projected to grow at a faster pace than the increased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 655 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 7.6 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 2,099 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 20.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 1,070 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 11.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 224 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.7 percent in 2030.

Increased Retention: 20% Primary Care/80% Non-Primary Care Mix

Urology

Demand for urologists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 364 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 31.8 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 557 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 41.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 428 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 35.3 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 307 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 28.2 percent in 2030.

Other Surgical Subspecialties

Demand for other surgical subspecialists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 405 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 24.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 683 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 35.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 490 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 28.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 323 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 20.5 percent in 2030.

Other Specialties

Demand for other specialists was projected to grow at a faster pace than the increased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 641 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 7.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 2,085 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 20.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 1,056 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 11.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 211 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.6 percent in 2030.

Figure 21 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
Urology	-368	-32.1%	-560	-41.8%	-431	-35.6%	-310	-28.5%
Other Surgical Subspecialties	-411	-24.8%	-689	-35.6%	-494	-28.4%	-328	-20.9%
Other Specialties	-678	-7.9%	-2,122	-21.1%	-1,093	-12.1%	-247	-3.0%
25% Primary Care/75% Non-Primary Care								
Urology	-366	-31.9%	-558	-41.7%	-429	-35.5%	-308	-28.3%
Other Surgical Subspecialties	-408	-24.6%	-685	-35.4%	-490	-28.2%	-325	-20.7%
Other Specialties	-655	-7.6%	-2,099	-20.9%	-1,070	-11.9%	-224	-2.7%
20% Primary Care/80% Non-Primary Care								
Urology	-364	-31.8%	-557	-41.6%	-428	-35.3%	-307	-28.2%
Other Surgical Subspecialties	-405	-24.5%	-683	-35.3%	-488	-28.1%	-323	-20.5%
Other Specialties	-641	-7.4%	-2,085	-20.7%	-1,056	-11.7%	-211	-2.6%

State Level Supply Scenario 3b: Decreased Retention of Physicians

Decreased Retention: 33% Primary Care/67% Non-Primary Care Mix

In the aggregate, physician demand was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 5,647 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the baseline demand scenario amounted to 6.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 16,844 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the growing economy scenario amounted to 17.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 9,863 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the universal health insurance by 2020 scenario amounted to 10.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 2,750 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **surplus** predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 3.3 percent in 2030.

Decreased Retention: 25% Primary Care/75% Non-Primary Care Mix

In the aggregate, physician demand was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 5,647 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the baseline demand scenario amounted to 6.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 16,844 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the growing economy scenario amounted to 17.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 9,863 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **shortage** predicted in the universal health insurance by 2020 scenario amounted to 10.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 2,750 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the **surplus** predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 3.3 percent in 2030.

Decreased Retention: 20% Primary Care/80% Non-Primary Care Mix

In the aggregate, physician demand was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 5,647 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 6.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 16,844 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 17.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 9,863 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 10.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 2,750 physicians by 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 3.3 percent in 2030.

Figure 22 – Projected Difference Between Physician Supply and Demand in New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-5,647	-6.5%	-16,844	-17.2%	-9,863	-10.9%	-2,750	-3.3%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-5,647	-6.5%	-16,844	-17.2%	-9,863	-10.9%	-2,750	-3.3%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-5,647	-6.5%	-16,844	-17.2%	-9,863	-10.9%	-2,750	-3.3%

Decreased Retention: 33% Primary Care/67% Non-Primary Care Mix

In the aggregate, primary care physician demand was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced primary care physician supply growth by 2,817 physicians through 2030. Expressed as a percentage of the number of physicians required to

meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 9.8 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced primary care physician supply growth by 4,929 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced primary care supply growth by 4,338 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 14.4 percent in 2030.

In the aggregate, non-primary care physician demand was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in three demand scenarios and projected to grow at a slower pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in the other scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced non-primary care physician supply growth by 2,830 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 4.9 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced non-primary care physician supply growth by 11,915 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 17.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced non-primary care supply growth by 5,525 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 9.1 percent in 2020.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), non-primary care physician supply growth outpaced non-primary care physician demand growth by 67 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenarios amounted to 0.1 percent in 2030.

Decreased Retention: 25% Primary Care/75% Non-Primary Care Mix

In the aggregate, primary care physician demand was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced primary care physician supply growth by 2,651 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to less than 9.3% percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced primary care physician supply growth by 4,763 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 15.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced primary care supply growth by 4,172 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 13.8 percent in 2030.

In the aggregate, non-primary care physician demand was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced non-primary care physician supply growth by 2,996 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to less than 5.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced non-primary care physician supply growth by 12,081 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 18.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced non-primary care supply growth by 5,691 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 9.4 percent in 2020.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), non-primary care physician demand growth outpaced non-primary care physician supply growth by 99 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenarios amounted to 0.2 percent in 2030.

Decreased Retention: 20% Primary Care/80% Non-Primary Care Mix

In the aggregate, primary care physician demand was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced primary care physician supply growth by 2,551 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to less than 8.9% percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced primary care physician supply growth by 4,663 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 15.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced primary care supply growth by 4,072 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 13.5 percent in 2030.

In the aggregate, non-primary care physician demand was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced non-primary care physician supply growth by 3,096 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 5.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced non-primary care physician supply growth by 12,181 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 18.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced non-primary care supply growth by 5,791 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 9.5 percent in 2020.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), non-primary care physician demand growth outpaced non-primary care physician supply growth by 199 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenarios amounted to 0.4 percent in 2030.

Figure 23 – Projected Difference Between Physician Supply and Demand in New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
Primary Care	-2,817	-9.8%	-4,929	-16.0%	-4,338	-14.4%	-2,817	-9.8%
Non-Primary Care	-2,830	-4.9%	-11,915	-17.8%	-5,525	-9.1%	67	0.1%
25% Primary Care/75% Non-Primary Care								
Primary Care	-2,651	-9.3%	-4,763	-15.5%	-4,172	-13.8%	-2,651	-9.3%
Non-Primary Care	-2,996	-5.2%	-12,081	-18.0%	-5,691	-9.4%	-99	-0.2%
20% Primary Care/80% Non-Primary Care								
Primary Care	-2,551	-8.9%	-4,663	-15.2%	-4,072	-13.5%	-2,551	-8.9%
Non-Primary Care	-3,096	-5.3%	-12,181	-18.2%	-5,791	-9.5%	-199	-0.4%

Specialty-Specific Supply and Demand Relationships

Primary Care Specialties

Decreased Retention: 33% Primary Care/67% Non-Primary Care Mix

General/Family Medicine

Demand for general/family medicine physicians was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 722 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 12.8 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,138 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the health insurance scenario amounted to 18.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 913 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 15.7 percent in 2020.

General Internal Medicine

Demand for general internists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 2,658 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 15.5 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 3,919 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 21.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 3,706 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 20.4 percent in 2030.

General Pediatrics

Demand for general pediatricians was projected to grow at a slower pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand change by 563 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 9.5 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 128 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 2.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 281 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 4.5 percent in 2030.

Decreased Retention: 25% Primary Care/75% Non-Primary Care Mix
General/Family Medicine

Demand for general/family medicine physicians was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 690 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 12.2 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,107 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the health insurance scenario amounted to 18.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 881 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 15.1 percent in 2020.

General Internal Medicine

Demand for general internists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 2,565 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 15.0 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 3,826 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 20.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 3,613 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 19.9 percent in 2030.

General Pediatrics

Demand for general pediatricians was projected to grow at a slower pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand change by 605 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 11.9 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 169 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 2.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 322 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 5.2 percent in 2030.

Decreased Retention: 20% Primary Care/80% Non-Primary Care Mix

General/Family Medicine

Demand for general/family medicine physicians was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 671 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 11.9 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,087 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the health insurance scenario amounted to 17.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 862 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 14.8 percent in 2020.

General Internal Medicine

Demand for general internists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in all of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 2,509 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 14.7 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 3,770 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 20.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 3,557 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance by 2020 scenario amounted to 19.6 percent in 2030.

General Pediatrics

Demand for general pediatricians was projected to grow at a slower pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand change by 630 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 10.7 percent in 2030. Because the assumptions of the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4) were identical for primary care physician demand as the baseline, the results comparing the baseline supply forecast to this scenario were also identical.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 194 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 3.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 347 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance by 2020 scenario amounted to 5.6 percent in 2030.

Figure 24 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-2,817	-9.8%	-4,929	-16.0%	-4,338	-14.4%	-2,817	-9.8%
General/Family Medicine	-722	-12.8%	-1,138	-18.8%	-913	-15.7%	-722	-12.8%
General Internal Medicine	-2,658	-15.5%	-3,919	-21.3%	-3,706	-20.4%	-2,658	-15.5%
General Pediatrics	563	9.5%	128	2.0%	281	4.5%	563	9.5%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-2,651	-9.3%	-4,763	-15.5%	-4,172	-13.8%	-2,651	-9.3%
General/Family Medicine	-690	-12.2%	-1,107	-18.3%	-881	-15.1%	-690	-12.2%
General Internal Medicine	-2,565	-15.0%	-3,826	-20.8%	-3,613	-19.9%	-2,565	-15.0%
General Pediatrics	605	10.2%	169	2.7%	322	5.2%	605	10.2%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-2,551	-8.9%	-4,663	-15.2%	-4,072	-13.5%	-2,551	-8.9%
General/Family Medicine	-671	-11.9%	-1,087	-17.9%	-862	-14.8%	-671	-11.9%
General Internal Medicine	-2,509	-14.7%	-3,770	-20.5%	-3,557	-19.6%	-2,509	-14.7%
General Pediatrics	630	10.7%	194	3.1%	347	5.6%	630	10.7%

Non-Primary Care Specialties

Decreased Retention: 33% Primary Care/67% Non-Primary Care Mix Cardiovascular Diseases

Demand for cardiologists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a slower pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 18 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 0.6 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 479 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 13.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 109 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 3.5 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 167 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 5.9 percent in 2030.

Other Internal Medicine Subspecialties

Demand for other internal medicine subspecialists was projected to grow at a slower pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in three demand scenarios and was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,801 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 16.7 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 7 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 0.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,183 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 10.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 2,341 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 22.8 percent in 2030.

Obstetrics and Gynecology

Demand for obstetrics and gynecology physicians was projected to grow at a slower pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in two demand scenarios and was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 67 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 1.7 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 218 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 5.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 120 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 2.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand change by 260 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 7.1 percent in 2030.

Pathology

Demand for pathologists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 697 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 35.7 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,025 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 44.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 816 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 39.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 600 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 32.3 percent in 2030.

Decreased Retention: 25% Primary Care/75% Non-Primary Care Mix

Cardiovascular Diseases

Demand for cardiologists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a slower pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 9 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 0.3 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 488 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 14.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 118 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 3.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 158 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 5.6 percent in 2030.

Other Internal Medicine Subspecialties

Demand for other internal medicine subspecialists was projected to grow at a slower pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in three demand scenarios and was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in the other demand scenario.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,763 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 16.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 45 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 0.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,145 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 10.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 2,303 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 22.5 percent in 2030.

Obstetrics and Gynecology

Demand for obstetrics and gynecology physicians was projected to grow at a slower pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios and was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 55 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 1.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 230 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 5.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 131 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 3.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand change by 248 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 6.8 percent in 2030.

Pathology

Demand for pathologists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 701 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 35.9 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,029 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 45.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 819 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 39.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 603 physicians. Expressed as a percentage of the number of

physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 32.5 percent in 2030.

Decreased Retention: 20% Primary Care/80% Non-Primary Care Mix
Cardiovascular Diseases

Demand for cardiologists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios and projected to grow at a slower pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 4 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 0.1 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 494 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 14.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 123 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 4.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 152 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 5.4 percent in 2030.

Other Internal Medicine Subspecialties

Demand for other internal medicine subspecialists was projected to grow at a slower pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in three demand scenarios and was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in one demand scenario.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,741 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 16.1 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 68 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 0.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,122 physicians through 2030. Expressed as a percentage of the number of physicians required to

meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 9.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 2,280 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 22.3 percent in 2030.

Obstetrics and Gynecology

Demand for obstetrics and gynecology physicians was projected to grow at a slower pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios and was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in two demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 48 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 1.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 237 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 5.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 138 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 3.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand change by 241 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 6.6 percent in 2030.

Pathology

Demand for pathologists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 703 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 36.0 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,031 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 45.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 822 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 39.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 606 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 32.6 percent in 2030.

Figure 25 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
Cardiology	18	0.6%	-479	-13.8%	-109	-3.5%	167	5.9%
Other Internal Medicine Subspecialties	1,801	16.7%	-7	-0.1%	1,183	10.4%	2,341	22.8%
Obstetrics and Gynecology	67	1.7%	-218	-5.3%	-120	-2.9%	260	7.1%
Pathology	-697	-35.7%	-1,025	-44.9%	-816	-39.4%	-600	-32.3%
25% Primary Care/75% Non-Primary Care								
Cardiology	9	0.3%	-488	-14.1%	-118	-3.8%	158	5.6%
Other Internal Medicine Subspecialties	1,763	16.4%	-45	-0.4%	1,145	10.0%	2,303	22.5%
Obstetrics and Gynecology	55	1.4%	-230	-5.5%	-131	-3.2%	248	6.8%
Pathology	-701	-35.9%	-1,029	-45.1%	-819	-39.6%	-603	-32.5%
20% Primary Care/80% Non-Primary Care								
Cardiology	4	0.1%	-494	-14.3%	-123	-4.0%	152	5.4%
Other Internal Medicine Subspecialties	1,741	16.1%	-68	-0.5%	1,122	9.8%	2,280	22.3%
Obstetrics and Gynecology	48	1.2%	-237	-5.7%	-138	-3.4%	241	6.6%
Pathology	-703	-36.0%	-1,031	-45.2%	-822	-39.7%	-606	-32.6%

Decreased Retention: 33% Primary Care/67% Non-Primary Care Mix Psychiatry

Demand for psychiatrists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 1,643 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 24.3 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 2,777 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 35.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 1,970 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 27.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 1,306 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 20.3 percent in 2030.

Anesthesiology

Demand for anesthesiologists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 395 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 9.0 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 1,131 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 22.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 635 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 13.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 176 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 4.2 percent in 2030.

Radiology

Demand for radiologists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in three demand scenarios and projected to grow at a slower pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in the other demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 82 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 2.0 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 787 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 335 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 7.5 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 128 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 3.2 percent in 2030.

Emergency Medicine

Demand for emergency medicine physicians was projected to grow at a slower pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,284 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 44.6 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,071 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 34.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,422 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 51.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,428 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 52.2 percent in 2030.

Decreased Retention: 25% Primary Care/75% Non-Primary Care Mix

Psychiatry

Demand for psychiatrists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 1,659 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 24.5 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 2,792 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 35.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 1,985 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 28.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 1,321 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 20.6 percent in 2030.

Anesthesiology

Demand for anesthesiologists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 407 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 9.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 1,143 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 22.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 647 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 14.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 188 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 4.5 percent in 2030.

Radiology

Demand for radiologists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in three demand scenarios and projected to grow at a slower pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in the other demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 94 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 2.2 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 799 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 348 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 7.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 116 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.9 percent in 2030.

Emergency Medicine

Demand for emergency medicine physicians was projected to grow at a slower pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,271 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 44.1 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,059 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 34.2 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,409 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 51.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,415 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 51.7 percent in 2030.

Decreased Retention: 20% Primary Care/80% Non-Primary Care Mix

Psychiatry

Demand for psychiatrists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 1,668 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 24.7 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 2,802 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 35.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 1,994 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 28.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 1,330 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 20.7 percent in 2030.

Anesthesiology

Demand for anesthesiologists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 415 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 9.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 1,150 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 22.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 654 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 14.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 195 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 4.7 percent in 2030.

Radiology

Demand for radiologists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in three demand scenarios and projected to grow at a slower pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in the other demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 102 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 2.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 807 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 355 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 8.0 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 108 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.7 percent in 2030.

Emergency Medicine

Demand for emergency medicine physicians was projected to grow at a slower pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), supply growth outpaced demand growth by 1,264 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the baseline demand scenario amounted to 43.9 percent in 2030.

In the growing economy scenario (demand scenario 2), supply growth outpaced demand growth by 1,051 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the growing economy scenario amounted to 34.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), supply growth outpaced demand growth by 1,402 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the universal health insurance scenario amounted to 51.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 1,408 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 51.5 percent in 2030.

Figure 26 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
Psychiatry	-1,643	-24.3%	-2,777	-35.2%	-1,970	-27.8%	-1,306	-20.3%
Anesthesiology	-395	-9.0%	-1,131	-22.1%	-635	-13.7%	-176	-4.2%
Radiology	-82	-2.0%	-787	-16.0%	-335	-7.5%	128	3.2%
Emergency Medicine	1,284	44.6%	1,071	34.6%	1,422	51.9%	1,428	52.2%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-1,659	-24.5%	-2,792	-35.4%	-1,985	-28.0%	-1,321	-20.6%
Anesthesiology	-407	-9.3%	-1,143	-22.3%	-647	-14.0%	-188	-4.5%
Radiology	-94	-2.2%	-799	-16.3%	-348	-7.8%	116	2.9%
Emergency Medicine	1,271	44.1%	1,059	34.2%	1,409	51.4%	1,415	51.7%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-1,668	-24.7%	-2,802	-35.5%	-1,994	-28.2%	-1,330	-20.7%
Anesthesiology	-415	-9.5%	-1,150	-22.5%	-654	-14.1%	-195	-4.7%
Radiology	-102	-2.4%	-807	-16.4%	-355	-8.0%	108	2.7%
Emergency Medicine	1,264	43.9%	1,051	34.0%	1,402	51.1%	1,408	51.5%

Decreased Retention: 33% Primary Care/67% Non-Primary Care Mix
General Surgery

Demand for general surgeons was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in three demand scenarios and projected to grow at a slower pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in the other demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 76 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 2.4 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 604 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.4 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 246 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 7.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 81 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.7 percent in 2030.

Ophthalmology

Demand for ophthalmologists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 864 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 35.6 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,271 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 44.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 915 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 36.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 743 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 32.2 percent in 2030.

Otolaryngology

Demand for otolaryngologists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 160 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 17.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 315 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 29.3 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 198 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 20.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 114 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 13.1 percent in 2030.

Orthopedic Surgery

Demand for orthopedic surgeons was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 166 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 7.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 543 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 20.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 309 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 12.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 53 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.5 percent in 2030.

Decreased Retention: 25% Primary Care/75% Non-Primary Care Mix

General Surgery

Demand for general surgeons was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in three demand scenarios and projected to grow at a

slower pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in the other demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 85 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 2.7 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 613 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.7percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 256 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 7.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 72 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.4 percent in 2030.

Ophthalmology

Demand for ophthalmologists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 869 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 35.8 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,276 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 45.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 922 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 37.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 750 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 32.5 percent in 2030.

Otolaryngology

Demand for otolaryngologists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 163 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 17.7 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 317 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 29.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 200 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 20.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 117 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 13.3 percent in 2030.

Orthopedic Surgery

Demand for orthopedic surgeons was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 172 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 7.7 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 549 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 20.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 315 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 13.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 60 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.8 percent in 2030.

Decreased Retention: 20% Primary Care/80% Non-Primary Care Mix
General Surgery

Demand for general surgeons was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in three demand scenarios and projected to grow at a slower pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in the other demand scenario.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 91 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 2.9 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply growth by 619 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 16.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 261 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 7.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), supply growth outpaced demand growth by 66 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *surplus* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 2.2 percent in 2030.

Ophthalmology

Demand for ophthalmologists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 872 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 35.9 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 1,279 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 45.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 922 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 37.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 750 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 32.5 percent in 2030.

Otolaryngology

Demand for otolaryngologists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 164 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 17.8 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 318 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 29.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 202 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 21.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 118 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 13.5 percent in 2030.

Orthopedic Surgery

Demand for orthopedic surgeons was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 176 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 7.8 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 553 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 21.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 319 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 13.3 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 63 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 3.0 percent in 2030.

Figure 27 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
General Surgery	-76	-2.4%	-604	-16.4%	-246	-7.4%	81	2.7%
Ophthalmology	-864	-35.6%	-1,271	-44.9%	-915	-36.9%	-743	-32.2%
Otolaryngology	-160	-17.4%	-315	-29.3%	-198	-20.7%	-114	-13.1%
Orthopedic Surgery	-166	-7.4%	-543	-20.7%	-309	-12.9%	-53	-2.5%
25% Primary Care/75% Non-Primary Care								
General Surgery	-85	-2.7%	-613	-16.7%	-256	-7.7%	72	2.4%
Ophthalmology	-869	-35.8%	-1,276	-45.0%	-919	-37.1%	-748	-32.4%
Otolaryngology	-163	-17.7%	-317	-29.5%	-200	-20.9%	-117	-13.3%
Orthopedic Surgery	-172	-7.7%	-549	-20.9%	-315	-13.2%	-60	-2.8%
20% Primary Care/80% Non-Primary Care								
General Surgery	-91	-2.9%	-619	-16.8%	-261	-7.9%	66	2.2%
Ophthalmology	-872	-35.9%	-1,279	-45.1%	-922	-37.2%	-750	-32.5%
Otolaryngology	-164	-17.8%	-318	-29.6%	-202	-21.1%	-118	-13.5%
Orthopedic Surgery	-176	-7.8%	-553	-21.1%	-319	-13.3%	-63	-3.0%

Decreased Retention: 33% Primary Care/67% Non-Primary Care Mix

Urology

Demand for urologists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 404 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 35.2 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 596 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 44.5 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 467 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 38.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 346 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 31.8 percent in 2030.

Other Surgical Subspecialties

Demand for other surgical subspecialists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 469 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 28.3 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 746 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 38.6 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 551 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 31.7 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 386 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 24.5 percent in 2030.

Other Specialties

Demand for other specialists was projected to grow at a faster pace than the decreased retention: 33% primary care/67% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 1,044 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 12.1 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 2,488 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 24.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 1,459 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 16.2 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 613 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 7.5 percent in 2030.

Decreased Retention: 25% Primary Care/75% Non-Primary Care Mix
Urology

Demand for urologists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 406 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 35.4 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 598 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 44.7 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 470 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 38.8 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 349 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 32.0 percent in 2030.

Other Surgical Subspecialties

Demand for other surgical subspecialists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 472 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 28.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 750 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 38.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 555 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 31.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 389 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 24.8 percent in 2030.

Other Specialties

Demand for other specialists was projected to grow at a faster pace than the decreased retention: 25% primary care/75% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 1,067 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 12.4 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 2,511 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 25.0 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 1,482 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 16.4 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 636 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 7.8 percent in 2030.

Decreased Retention: 20% Primary Care/80% Non-Primary Care Mix

Urology

Demand for urologists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 407 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 35.5 percent in 2030.

In the growing economy scenario (demand scenario 2) demand growth outpaced supply change by 600 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 44.8 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 471 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 38.9 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 350 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 32.1 percent in 2030.

Other Surgical Subspecialties

Demand for other surgical subspecialists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply change by 474 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 28.7 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply change by 752 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 38.9 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply change by 557 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 32.1 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply change by 391 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 24.9 percent in 2030.

Other Specialties

Demand for other specialists was projected to grow at a faster pace than the decreased retention: 20% primary care/80% non-primary care mix physician supply forecast in each of the demand scenarios.

In the baseline demand scenario (demand scenario 1), demand growth outpaced supply growth by 1,080 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the baseline demand scenario amounted to 12.5 percent in 2030.

In the growing economy scenario (demand scenario 2), demand growth outpaced supply growth by 2,525 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the growing economy scenario amounted to 25.1 percent in 2030.

In the universal health insurance by 2020 scenario (demand scenario 3), demand growth outpaced supply growth by 1,495 physicians through 2030. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the universal health insurance scenario amounted to 16.6 percent in 2030.

In the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario (demand scenario 4), demand growth outpaced supply growth by 650 physicians. Expressed as a percentage of the number of physicians required to meet the demand for their services, the *shortage* predicted in the partial elimination of unnecessary/marginally-beneficial/duplicative services scenario amounted to 7.9 percent in 2030.

Figure 28 – Projected Difference Between Physician Supply and Demand in New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
33% Primary Care/67% Non-Primary Care								
Urology	-404	-35.2%	-596	-44.5%	-467	-38.6%	-346	-31.8%
Other Surgical Subspecialties	-469	-28.3%	-746	-38.6%	-551	-31.7%	-386	-24.5%
Other Specialties	-1,044	-12.1%	-2,488	-24.7%	-1,459	-16.2%	-613	-7.5%
25% Primary Care/75% Non-Primary Care								
Urology	-406	-35.4%	-598	-44.7%	-470	-38.8%	-349	-32.0%
Other Surgical Subspecialties	-472	-28.5%	-750	-38.8%	-555	-31.9%	-389	-24.8%
Other Specialties	-1,067	-12.4%	-2,511	-25.0%	-1,482	-16.4%	-636	-7.8%
20% Primary Care/80% Non-Primary Care								
Urology	-407	-35.5%	-600	-44.8%	-471	-38.9%	-350	-32.1%
Other Surgical Subspecialties	-474	-28.7%	-752	-38.9%	-557	-32.1%	-391	-24.9%
Other Specialties	-1,080	-12.5%	-2,525	-25.1%	-1,495	-16.6%	-650	-7.9%

Chapter 10: Limitations

The findings presented in this study are subject to a number of limitations that should be considered prior to developing policy based upon them.

Nature of Forecasting

In general, as with all forecasting endeavors, the forecasts of physician supply and demand presented here are constructed on a foundation of assumptions. These assumptions are associated with the factors that determine physician supply and demand (e.g., number of new entrants into the New York physician workforce; age-, gender-, location-, insurance status-specific physician utilization rates; estimated elasticities of physician demand to economic change; and so forth). To the extent these assumptions fail to hold over the forecast period, the accuracy of the forecasts will suffer. However, the assumptions made were based upon historical data and, where available, New York-specific data. Moreover, the construction of multiple scenarios that allow for variation in some of the key assumptions of the forecasting models mitigates the risk of inaccuracy due to ill-chosen assumptions.

Another way to consider the forecasts in this report is to think of them as illustrative of what the future might hold under a specific set of conditions. For example, in one of the demand scenarios developed for this report, it was assumed that five percent of non-primary care services would be identified as unnecessary/marginally-beneficial/duplicative services and would be eliminated by 2030. How likely is it that the health care system will change enough for this assumption to hold true? At this point in time, it is not clear. However, the scenario developed with this assumption does illustrate the effect on demand for physicians in such an environment. Thus, one could use this information to know what the effect might be should some portion of these services be eliminated. The same could be said for any of the assumptions made in these forecasts.

Potential Feedback

The findings presented here also do not take into account the potential feedback effects resulting from the predicted national physician shortage or the predicted physician shortage in New York. For example, the predicted shortage of cardiologists nationally may influence young physicians to select cardiology as a practice specialty at a higher rate than the forecast models assume. Moreover, in response to a widespread shortage of physicians, current practitioners may delay retirement. Further, if demand for physicians was to decrease as sharply as the scenarios in which unnecessary services were eliminated, it is likely that supply would respond by growing at a slower same rate than forecast, reducing the imbalances suggested by the models. There is a nearly infinite list of other potential feedback effects in response to physician shortages that could affect supply and demand in the future.

Similarly, the findings presented in this summary do not fully take into account policy changes that might be wrought as a result of the publication of the findings. While national policies around the physician workforce do not appear to have been affected greatly by the federal COGME's *Sixteenth Report* yet, state-level initiatives have begun to respond to the predicted shortage of physicians. With a reported shortages worsening in many states, it is likely that competition for physicians among states will increase. In the same way states compete feverishly for new businesses and their accompanying jobs, they are acting similarly with regard to physician recruitment. The nature of this competition is likely to have ramifications for the relationship between physician supply and demand in New York that is not accounted for completely in the current forecasting models.

Forward Looking Forecasts

Finally, this report does not attempt to determine the extent to which there are current shortages of physicians in the state. Rather, it is forward-looking, focused on trends in the growth rates of physician supply and demand under a number of potential scenarios. An assessment of the current adequacy would require a radically different approach, including the construction of rational services areas, small area analyses, health status indicators, and the involvement of local provider agencies, among other things.⁷⁷ The purpose of the current assessment is to provide information for the higher-level, broader policy community and offer a context within which to develop targeted policies and programs.

⁷⁷ Such an assessment is currently being conducted by the Center for Health Workforce Studies and the Community Health Center Association of New York State with support from the New York State Department of Health.

Appendices

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<i>Appendix 3: Regional Specialty-Specific Demand Forecasts</i>	A-559
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Appendix 1: Additional County-Level Demographic Data

Figure 1 – Historical Population Change in New York by Region and County, 1990-2006 and 2000-2006

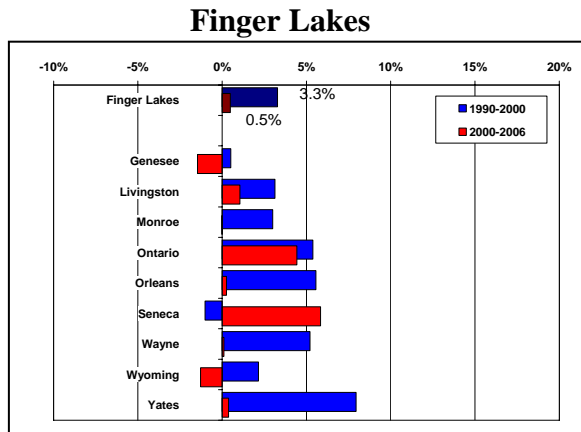
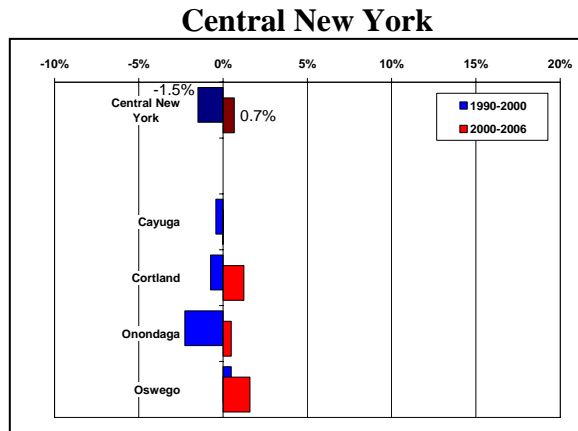
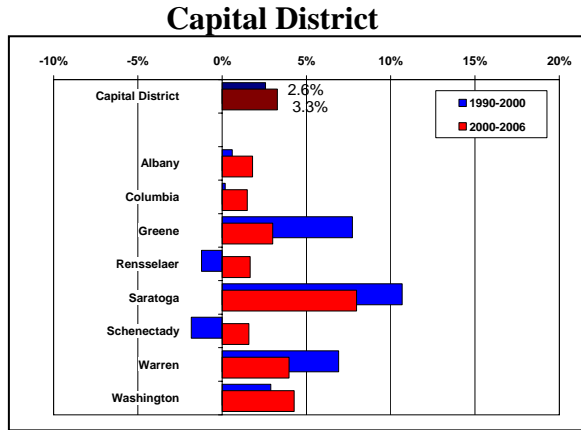
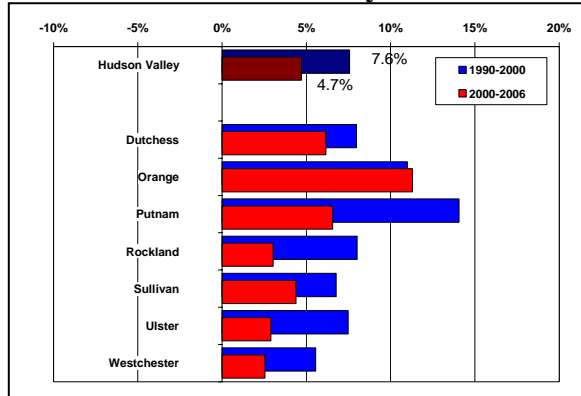
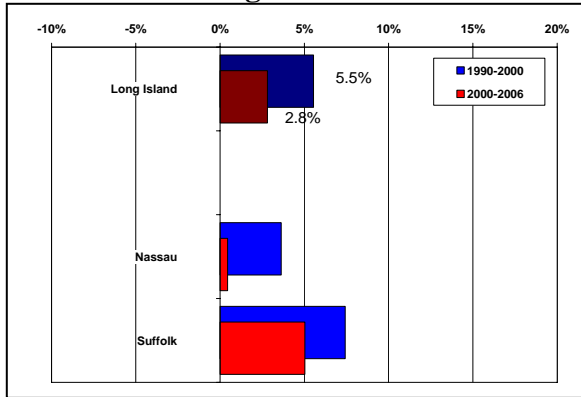


Figure 5 – Historical Population Change in New York by Region and County, 1990-2006 and 2000-2006 (cont.)

Hudson Valley



Long Island



Mohawk Valley

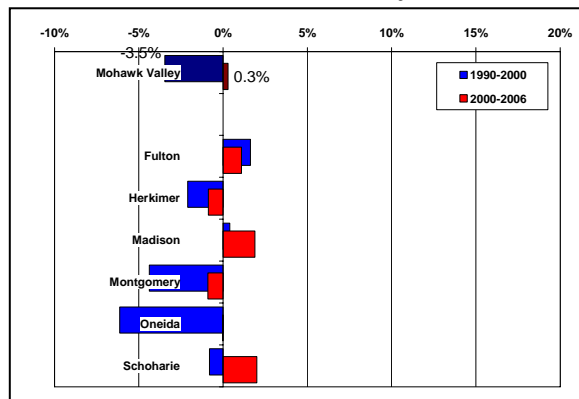
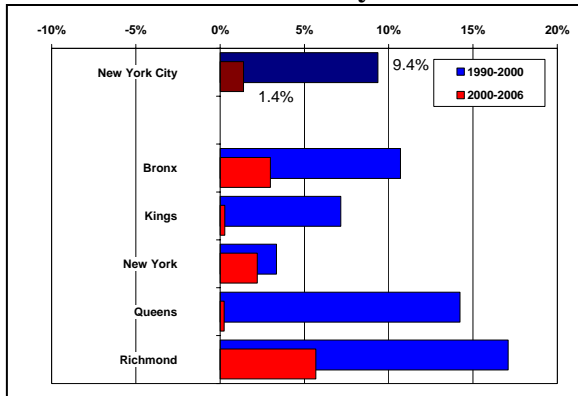
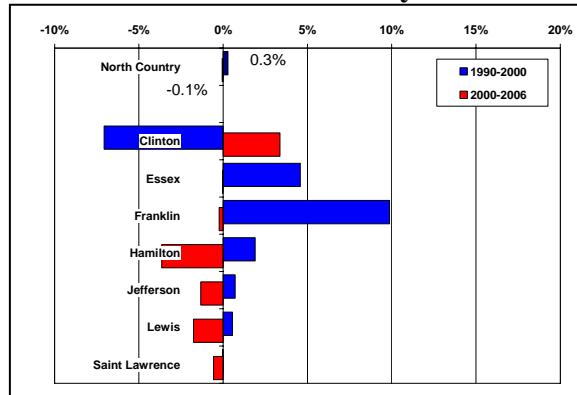


Figure 5 – Historical Population Change in New York by Region and County, 1990-2006 and 2000-2006 (cont.)

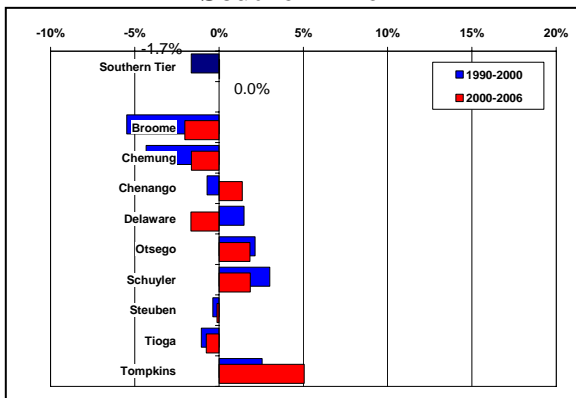
New York City



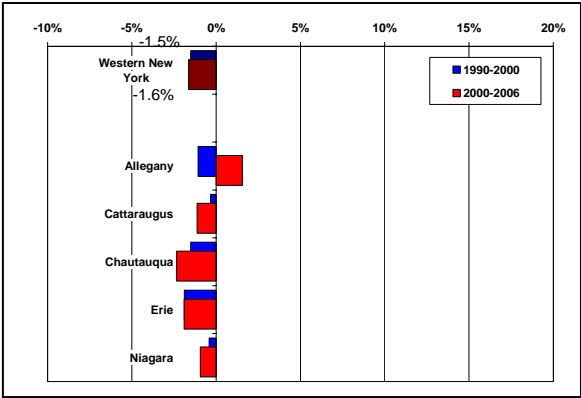
North Country



Southern Tier



Western New York



Sources: United States Bureau of the Census. Table CO-EST2001-12-36 - Time Series of New York Intercensal Population Estimates by County: April 1, 1990 to April 1, 2000. Retrieved 11/15/2007. http://www.census.gov/popest/archives/2000s/vintage_2001/CO-EST2001-12/CO-EST2001-12-36.xls; United States Bureau of the Census. Table 1: Annual Estimates of the Population for Counties of New York: April 1, 2000 to July 1, 2007 (CO-EST2007-01-36). Retrieved 03/20/2008. <http://www.census.gov/popest/counties/tables/CO-EST2007-01-36.xls>

Table 1 – Population Size and Projected Growth by Region and County, 2006-2030

	2006	2010	2015	2020	2025	2030	% Change 2006 to 2030	Avg Annual % Change
Capital District	1,063,621	1,063,173	1,062,733	1,059,133	1,050,684	1,036,696	-2.5%	-0.11%
Albany	299,894	299,157	299,406	298,610	296,189	292,202	-2.6%	-0.11%
Columbia	64,037	62,988	61,337	59,414	57,111	54,433	-15.0%	-0.67%
Greene	49,642	50,498	51,349	52,096	52,619	52,831	6.4%	0.26%
Rensselaer	155,064	152,859	150,227	146,967	143,226	138,968	-10.4%	-0.46%
Saratoga	216,639	221,309	226,836	231,730	235,417	237,695	9.7%	0.39%
Schenectady	148,879	146,036	142,642	139,269	135,471	131,030	-12.0%	-0.53%
Warren	65,816	66,658	67,486	68,001	68,196	67,952	3.2%	0.13%
Washington	63,650	63,667	63,451	63,045	62,455	61,585	-3.2%	-0.14%
Central New York	716,032	706,963	696,152	683,492	668,202	650,046	-9.2%	-0.40%
Cayuga	81,941	80,788	79,073	77,154	74,930	72,351	-11.7%	-0.52%
Cortland	49,201	49,020	49,032	48,727	48,178	47,546	-3.4%	-0.14%
Onondaga	460,562	452,593	443,183	432,994	421,163	407,281	-11.6%	-0.51%
Oswego	124,328	124,561	124,865	124,617	123,931	122,869	-1.2%	-0.05%
Finger Lakes	1,205,419	1,206,018	1,207,086	1,205,606	1,199,061	1,186,249	-1.6%	-0.07%
Genesee	59,489	58,695	57,622	56,398	54,921	53,060	-10.8%	-0.48%
Livingston	65,003	65,754	66,783	67,567	68,213	68,613	5.6%	0.23%
Monroe	735,248	733,356	732,599	730,867	725,854	716,954	-2.5%	-0.10%
Ontario	104,664	105,547	106,251	106,410	106,032	105,010	0.3%	0.01%
Orleans	44,284	45,096	45,978	46,829	47,556	48,098	8.6%	0.34%
Seneca	35,288	34,625	33,540	32,327	30,993	29,513	-16.4%	-0.74%
Wayne	93,862	94,836	95,791	96,587	97,108	97,240	3.6%	0.15%
Wyoming	42,867	42,807	42,425	41,768	40,811	39,600	-7.6%	-0.33%
Yates	24,714	25,301	26,097	26,853	27,573	28,158	13.9%	0.55%
Hudson Valley	2,281,845	2,309,665	2,344,431	2,377,124	2,401,883	2,415,524	5.9%	0.24%
Dutchess	297,426	302,448	308,437	313,757	317,886	320,467	7.7%	0.31%
Orange	379,931	392,586	408,808	424,762	440,088	454,359	19.6%	0.75%
Putnam	102,026	105,117	108,750	112,183	115,165	117,568	15.2%	0.59%
Rockland	295,447	296,388	296,504	295,424	292,419	287,586	-2.7%	-0.11%
Sullivan	77,208	79,369	82,337	85,339	88,243	91,052	17.9%	0.69%
Ulster	182,907	187,847	194,551	201,236	207,468	213,071	16.5%	0.64%
Westchester	946,900	945,910	945,044	944,422	940,613	931,421	-1.6%	-0.07%
Long Island	2,831,266	2,831,259	2,831,291	2,830,637	2,818,832	2,789,402	-1.5%	-0.06%
Nassau	1,340,513	1,329,359	1,318,419	1,310,086	1,298,371	1,279,186	-4.6%	-0.19%
Suffolk	1,490,753	1,501,901	1,512,873	1,520,551	1,520,461	1,510,216	1.3%	0.05%
Mohawk Valley	507,194	502,322	496,150	488,802	479,942	468,912	-7.5%	-0.33%
Fulton	55,675	55,259	54,486	53,418	52,104	50,513	-9.3%	-0.40%
Herkimer	63,865	62,571	60,745	58,676	56,410	53,841	-15.7%	-0.71%
Madison	70,750	70,900	71,204	71,084	70,838	70,450	-0.4%	-0.02%
Montgomery	49,260	47,537	45,335	43,096	40,734	38,174	-22.5%	-1.06%
Oneida	235,430	234,253	233,167	232,051	230,231	227,278	-3.5%	-0.15%
Schoharie	32,214	31,802	31,213	30,478	29,623	28,657	-11.0%	-0.49%
New York City	8,119,187	8,289,458	8,507,739	8,720,871	8,910,821	9,073,034	11.7%	0.46%
Bronx	1,372,440	1,406,149	1,449,840	1,492,451	1,532,301	1,568,338	14.3%	0.56%
Kings	2,472,045	2,493,913	2,516,587	2,533,941	2,544,215	2,546,565	3.0%	0.12%
New York	1,571,049	1,578,811	1,588,818	1,595,520	1,593,302	1,584,100	0.8%	0.03%
Queens	2,234,739	2,318,158	2,429,526	2,544,726	2,656,378	2,761,084	23.6%	0.89%
Richmond	468,914	492,427	522,968	554,233	584,625	612,946	30.7%	1.12%

Table 1 – Population Size and Projected Growth by Region and County, 2006-2030 (cont.)

	2006	2010	2015	2020	2025	2030	% Change 2006 to 2030	Avg Annual % Change
North Country	425,633	429,820	435,774	440,406	444,288	447,345	5.1%	0.21%
Clinton	82,591	84,378	86,986	89,304	91,388	93,323	13.0%	0.51%
Essex	38,835	39,278	39,678	40,010	40,225	40,211	3.5%	0.15%
Franklin	51,015	52,708	54,736	56,656	58,507	60,158	17.9%	0.69%
Hamilton	5,183	5,117	5,028	4,970	4,880	4,770	-8.0%	-0.35%
Jefferson	110,247	110,109	110,246	110,447	110,559	110,559	0.3%	0.01%
Lewis	26,470	26,266	25,835	25,305	24,721	24,032	-9.2%	-0.40%
St. Lawrence	111,292	111,964	113,266	113,714	114,007	114,293	2.7%	0.11%
Southern Tier	719,143	715,303	711,041	704,192	695,422	684,532	-4.8%	-0.21%
Broome	196,463	197,261	199,042	200,713	201,925	202,628	3.1%	0.13%
Chemung	89,571	87,227	84,039	80,722	77,368	73,705	-17.7%	-0.81%
Chenango	52,108	51,426	50,289	48,919	47,336	45,529	-12.6%	-0.56%
Delaware	47,253	47,133	46,776	46,150	45,355	44,317	-6.2%	-0.27%
Otsego	62,805	63,679	65,124	66,152	66,975	67,818	8.0%	0.32%
Schuyler	19,580	19,478	19,204	18,789	18,276	17,669	-9.8%	-0.43%
Steuben	98,602	97,383	95,152	92,345	89,142	85,438	-13.4%	-0.60%
Tioga	51,391	50,109	48,344	46,457	44,408	42,217	-17.9%	-0.82%
Tompkins	101,370	101,606	103,071	103,946	104,636	105,212	3.8%	0.16%
Western New York	1,420,166	1,399,137	1,372,619	1,344,494	1,313,277	1,277,106	-10.1%	-0.44%
Allegany	50,703	52,227	54,413	56,177	58,024	59,978	18.3%	0.70%
Cattaraugus	83,002	82,814	82,381	81,748	80,997	79,999	-3.6%	-0.15%
Chautauqua	136,475	135,384	133,967	132,287	130,430	128,173	-6.1%	-0.26%
Erie	932,217	913,898	891,548	869,030	844,391	816,430	-12.4%	-0.55%
Niagara	217,769	214,814	210,310	205,252	199,434	192,527	-11.6%	-0.51%

Sources: Claritas, 2006; Center for Health Workforce Studies adjusted Cornell University Program on Applied Demographics population projections vintage April 2008.

Table 2 – Percent of Population Age 65 and Older by Region and County, 2006

	Population Age 65 and Older	Percentage of Population
Capital District	150,690	14.2%
Albany	42,255	14.1%
Columbia	10,454	16.3%
Greene	7,780	15.7%
Rensselaer	20,509	13.2%
Saratoga	26,427	12.2%
Schenectady	23,645	15.9%
Warren	10,367	15.8%
Washington	9,253	14.5%
Central New York	96,452	13.5%
Cayuga	11,981	14.6%
Cortland	6,252	12.7%
Onondaga	63,446	13.8%
Oswego	14,773	11.9%

Table 2 – Percent of Population Age 65 and Older by Region and County, 2006 (cont)

	Population Age 65 and Older	Percentage of Population
<i>Finger Lakes</i>	161,870	13.4%
Genesee	8,914	15.0%
Livingston	7,873	12.1%
Monroe	98,008	13.3%
Ontario	14,610	14.0%
Orleans	5,719	12.9%
Seneca	5,270	14.9%
Wayne	12,171	13.0%
Wyoming	5,421	12.6%
Yates	3,884	15.7%
<i>Hudson Valley</i>	292,568	12.8%
Dutchess	36,837	12.4%
Orange	38,389	10.1%
Putnam	10,884	10.7%
Rockland	37,881	12.8%
Sullivan	11,152	14.4%
Ulster	24,982	13.7%
Westchester	132,443	14.0%
<i>Long Island</i>	387,451	13.7%
Nassau	202,011	15.1%
Suffolk	185,440	12.4%
<i>Mohawk Valley</i>	80,408	15.9%
Fulton	8,786	15.8%
Herkimer	10,523	16.5%
Madison	9,327	13.2%
Montgomery	8,931	18.1%
Oneida	37,944	16.1%
Schoharie	4,897	15.2%
<i>New York City</i>	989,386	12.2%
Bronx	140,646	10.2%
Kings	297,109	12.0%
New York	200,786	12.8%
Queens	294,601	13.2%
Richmond	56,244	12.0%
<i>North Country</i>	56,644	13.3%
Clinton	10,461	12.7%
Essex	6,442	16.6%
Franklin	6,679	13.1%
Hamilton	1,055	20.4%
Jefferson	13,056	11.8%
Lewis	3,840	14.5%
St. Lawrence	15,111	13.6%

Table 2 – Percent of Population Age 65 and Older by Region and County, 2006 (cont)

	Population Age 65 and Older	Percentage of Population
Southern Tier	108,440	15.1%
Broome	32,664	16.6%
Chemung	14,007	15.6%
Chenango	8,032	15.4%
Delaware	8,910	18.9%
Otsego	9,384	14.9%
Schuyler	3,009	15.4%
Steuben	15,053	15.3%
Tioga	7,350	14.3%
Tompkins	10,031	9.9%
Western New York	222,161	15.6%
Allegany	7,183	14.2%
Cattaraugus	12,327	14.9%
Chautauqua	21,825	16.0%
Erie	147,336	15.8%
Niagara	33,490	15.4%

Source: Claritas, 2006

Table 3 – Historical Percentage Population Change by Age Group, Region, and County, 2000-2006

	Under 5	5-14	15-24	25-44	45-64	65-84	85 and Older
Capital District	-5.7%	-8.8%	12.2%	-3.7%	16.5%	0.5%	17.4%
Albany	-4.3%	-8.7%	3.4%	-2.2%	15.0%	-3.8%	17.8%
Columbia	-7.5%	-14.5%	25.8%	-8.1%	11.8%	0.5%	4.2%
Greene	-9.9%	-11.7%	23.1%	-5.3%	12.0%	0.7%	20.2%
Rensselaer	-7.0%	-9.0%	4.3%	-3.9%	17.3%	-1.8%	6.0%
Saratoga	-6.4%	-4.1%	20.0%	-1.3%	21.8%	12.1%	38.4%
Schenectady	-2.9%	-7.6%	15.9%	-8.1%	16.4%	-6.1%	15.0%
Warren	-5.7%	-13.6%	20.3%	-3.8%	14.7%	6.7%	17.8%
Washington	-8.7%	-14.6%	23.6%	-3.1%	15.4%	7.1%	16.5%
Central New York	-6.6%	-11.4%	7.2%	-7.0%	16.1%	-1.8%	24.8%
Cayuga	-11.7%	-14.9%	14.9%	-9.5%	15.5%	-2.7%	29.2%
Cortland	-5.0%	-11.4%	-4.3%	3.3%	12.3%	0.5%	21.9%
Onondaga	-5.0%	-9.5%	6.6%	-7.9%	16.2%	-3.1%	23.8%
Oswego	-10.2%	-15.7%	10.9%	-5.8%	17.9%	3.8%	27.2%
Finger Lakes	-6.9%	-12.4%	11.2%	-9.7%	15.9%	1.5%	18.3%
Genesee	-8.8%	-16.1%	15.0%	-14.5%	15.8%	0.0%	22.8%
Livingston	-8.7%	-15.2%	1.5%	-4.9%	17.4%	6.6%	13.4%
Monroe	-5.7%	-11.2%	8.0%	-9.9%	15.7%	-0.3%	18.0%
Ontario	-5.5%	-11.3%	21.0%	-7.2%	17.9%	9.0%	22.4%
Orleans	-11.7%	-14.4%	18.9%	-11.2%	16.7%	2.2%	20.4%
Seneca	-6.1%	-18.5%	32.5%	4.9%	12.4%	1.1%	28.0%
Wayne	-11.6%	-13.7%	23.2%	-14.6%	16.9%	5.0%	18.7%
Wyoming	-9.3%	-18.7%	13.6%	-10.8%	14.8%	0.6%	14.1%
Yates	-12.1%	-8.7%	12.8%	-9.0%	10.9%	1.9%	0.8%
Hudson Valley	-2.4%	-2.8%	19.5%	-6.5%	17.4%	5.4%	12.6%
Dutchess	-5.4%	-5.3%	18.7%	-3.7%	20.5%	8.3%	17.0%
Orange	0.1%	0.3%	29.6%	2.6%	25.4%	8.6%	12.5%
Putnam	-10.0%	-3.7%	32.3%	-9.8%	22.6%	18.7%	21.0%
Rockland	0.8%	-3.9%	15.8%	-8.6%	10.8%	13.5%	0.5%
Sullivan	-3.0%	-9.0%	26.1%	-3.2%	11.5%	3.0%	25.8%
Ulster	-7.1%	-11.7%	15.2%	-6.0%	16.3%	3.7%	16.8%
Westchester	-2.2%	-0.7%	15.8%	-10.2%	16.0%	1.1%	12.5%
Long Island	-5.4%	-4.1%	16.7%	-9.7%	17.3%	3.3%	19.7%
Nassau	-8.2%	-6.2%	14.0%	-12.5%	15.8%	-2.2%	23.0%
Suffolk	-2.9%	-2.1%	19.2%	-7.3%	18.7%	9.9%	16.0%

Table 3 – Historical Percentage Population Change by Age Group, Region, and County, 2000-2006 (cont.)

	Under 5	5-14	15-24	25-44	45-64	65-84	85 and Older
Mohawk Valley	-6.8%	-12.1%	13.3%	-8.0%	13.0%	-3.8%	14.3%
Fulton	-4.7%	-11.2%	16.0%	-7.1%	14.2%	-5.8%	20.3%
Herkimer	-7.2%	-14.8%	10.7%	-7.3%	11.2%	-6.4%	19.5%
Madison	-11.4%	-12.6%	12.3%	-9.5%	17.2%	6.0%	20.1%
Montgomery	-1.4%	-11.3%	11.6%	-7.9%	12.0%	-9.9%	12.8%
Oneida	-6.2%	-11.4%	13.7%	-8.1%	12.1%	-4.0%	9.9%
Schoharie	-12.6%	-13.6%	16.7%	-7.6%	13.9%	1.6%	22.7%
New York City	6.8%	-3.8%	-7.7%	-2.8%	13.1%	3.3%	20.2%
Bronx	7.3%	-3.4%	1.6%	-1.3%	13.8%	4.2%	10.0%
Kings	4.4%	-5.7%	-6.5%	-4.3%	12.1%	2.6%	22.4%
New York	24.6%	0.0%	-19.3%	0.3%	10.6%	5.4%	20.6%
Queens	1.9%	-3.7%	-11.3%	-4.8%	14.6%	1.3%	23.1%
Richmond	-2.6%	-3.2%	10.8%	-0.7%	17.5%	7.9%	20.0%
North Country	-6.1%	-14.1%	5.6%	-6.2%	12.3%	3.0%	15.0%
Clinton	-5.9%	-14.7%	3.1%	0.6%	16.9%	10.2%	11.3%
Essex	-14.6%	-19.9%	21.8%	-7.7%	10.8%	1.1%	20.0%
Franklin	-8.5%	-18.8%	14.3%	-8.6%	15.4%	0.1%	14.6%
Hamilton	-13.0%	-14.0%	12.8%	-12.2%	1.7%	-5.0%	27.2%
Jefferson	-4.9%	-7.4%	-0.8%	-7.2%	11.3%	1.0%	19.9%
Lewis	-10.7%	-19.9%	13.9%	-13.0%	15.3%	1.6%	17.8%
St. Lawrence	-2.8%	-15.1%	4.9%	-6.6%	9.0%	3.2%	9.0%
Southern Tier	-6.9%	-14.2%	7.7%	-7.1%	12.1%	-0.9%	18.1%
Broome	-8.6%	-14.6%	3.3%	-8.4%	10.0%	-3.7%	19.5%
Chemung	-2.9%	-11.7%	9.8%	-12.7%	11.8%	-4.9%	22.9%
Chenango	-9.5%	-15.1%	22.0%	-8.3%	13.0%	3.7%	12.8%
Delaware	-11.5%	-16.7%	15.0%	-9.5%	6.0%	-0.9%	4.2%
Otsego	-6.3%	-19.1%	6.3%	2.5%	11.4%	-1.4%	17.8%
Schuyler	-9.4%	-13.7%	17.8%	-7.7%	12.3%	5.6%	16.2%
Steuben	-7.2%	-14.5%	16.0%	-8.0%	11.1%	-2.0%	19.2%
Tioga	-10.5%	-17.0%	19.3%	-15.9%	15.5%	7.7%	13.2%
Tompkins	0.2%	-7.9%	0.4%	3.6%	20.8%	5.6%	26.1%
Western New York	-8.4%	-12.7%	7.1%	-10.4%	12.9%	-5.1%	19.5%
Allegany	-6.0%	-17.7%	14.1%	-2.9%	8.6%	1.4%	10.7%
Cattaraugus	-5.7%	-14.6%	11.8%	-11.4%	11.4%	-1.9%	17.3%
Chautauqua	-8.8%	-15.2%	5.1%	-9.1%	10.2%	-4.4%	9.6%
Erie	-8.7%	-11.7%	5.7%	-10.6%	13.0%	-5.8%	20.5%
Niagara	-8.7%	-13.0%	9.8%	-11.5%	15.7%	-4.7%	25.0%

Source: U.S. Census Bureau, 2008; Claritas, 2006

Table 4 – Projected Population Change by Age Group, Region, and County, 2006-2030

	Under 5	5-14	15-24	25-44	45-64	65-84	85 and Older
Capital District	-3,578	-11,287	-14,398	-22,879	-47,558	65,545	7,230
Albany	-678	-2,484	-2,911	-5,622	-14,807	16,809	2,001
Columbia	-798	-1,907	-2,622	-3,255	-4,807	3,342	442
Greene	-147	-283	-445	1,068	-1,167	3,582	582
Rensselaer	-952	-2,670	-2,908	-6,671	-10,525	7,148	481
Saratoga	421	-171	-246	-101	-1,778	20,696	2,236
Schenectady	-1,311	-3,155	-3,378	-5,888	-9,605	5,516	-28
Warren	-49	-75	-394	-931	-2,441	5,091	934
Washington	-64	-543	-1,495	-1,480	-2,427	3,361	583
Central New York	-3,954	-10,310	-14,184	-24,201	-48,049	30,450	4,263
Cayuga	-749	-1,766	-2,972	-3,555	-5,054	4,049	457
Cortland	46	378	-210	-763	-3,249	1,793	350
Onondaga	-3,318	-9,374	-10,115	-17,431	-32,716	16,848	2,825
Oswego	67	453	-888	-2,452	-7,031	7,760	631
Finger Lakes	-2,058	-7,257	-14,128	-13,914	-57,781	69,198	6,769
Genesee	-472	-1,364	-2,046	-3,080	-3,555	3,921	168
Livingston	191	672	163	1,256	-2,460	3,417	370
Monroe	-1,145	-4,540	-7,541	-7,807	-38,597	37,961	3,375
Ontario	-14	-530	-1,281	-1,922	-5,759	8,775	1,077
Orleans	155	426	-340	542	-318	3,021	328
Seneca	-519	-1,049	-1,275	-2,022	-2,280	1,060	310
Wayne	72	-78	-813	135	-2,468	6,084	446
Wyoming	-506	-1,129	-1,595	-1,538	-1,812	2,835	478
Yates	182	334	600	521	-532	2,123	217
Hudson Valley	7,017	-2,880	-2,131	21,691	-32,390	123,912	18,460
Dutchess	1,536	1,484	-171	4,230	-6,221	19,121	3,063
Orange	5,371	10,287	7,576	21,000	2,132	25,172	2,890
Putnam	804	848	405	2,375	1,346	8,619	1,144
Rockland	-604	-5,336	-3,661	-5,384	-8,892	12,557	3,459
Sullivan	1,009	2,504	1,007	2,960	259	5,376	729
Ulster	1,662	4,427	2,113	8,460	-1,415	13,362	1,555
Westchester	-2,760	-17,094	-9,400	-11,951	-19,600	39,706	5,620
Long Island	607	-42,066	-34,848	-33,196	-89,224	132,828	24,034
Nassau	207	-21,781	-19,273	-18,821	-54,059	44,040	8,361
Suffolk	401	-20,285	-15,575	-14,374	-35,165	88,788	15,673

Table 4 – Projected Population Change by Age Group, Region, and County, 2006-2030 (cont.)

	Under 5	5-14	15-24	25-44	45-64	65-84	85 and Older
Mohawk Valley	-2,745	-6,142	-9,979	-14,242	-29,356	22,199	1,983
Fulton	-613	-1,356	-1,624	-2,732	-2,865	3,910	118
Herkimer	-799	-1,595	-2,372	-4,038	-4,115	2,638	258
Madison	250	460	127	-413	-4,194	3,119	350
Montgomery	-983	-1,973	-2,193	-4,047	-3,530	1,661	-22
Oneida	-451	-1,122	-3,323	-1,698	-12,022	9,396	1,068
Schoharie	-149	-557	-593	-1,314	-2,630	1,474	211
New York City	17,646	52,740	67,801	63,618	198,257	510,399	43,387
Bronx	8,992	22,636	26,168	35,556	29,055	66,541	6,951
Kings	-9,664	-12,619	-4,611	-37,078	16,633	116,969	4,889
New York	-11,923	-11,030	-6,035	-78,760	1,809	109,609	9,382
Queens	22,411	38,391	40,220	111,454	130,604	168,261	15,004
Richmond	7,829	15,362	12,058	32,446	20,156	49,018	7,162
North Country	890	4,265	-53	6,087	-13,347	21,707	2,164
Clinton	783	2,160	770	3,390	-2,032	4,976	686
Essex	-127	-222	-669	85	-599	2,608	300
Franklin	-70	157	-81	2,833	2,026	3,967	312
Hamilton	-38	-63	-125	-245	-369	398	28
Jefferson	78	262	-130	978	-3,487	2,721	-111
Lewis	-236	-429	-916	-1,256	-1,275	1,570	104
St. Lawrence	501	2,398	1,099	301	-7,610	5,467	844
Southern Tier	-2,259	-3,683	-7,591	-15,333	-41,566	32,166	3,655
Broome	1,107	1,314	-367	1,632	-7,237	9,107	607
Chemung	-1,359	-2,654	-2,993	-4,779	-6,863	2,623	160
Chenango	-476	-1,032	-1,787	-2,661	-3,362	2,396	342
Delaware	-126	-110	-530	-1,381	-4,072	2,743	540
Otsego	438	1,518	976	1,380	-3,116	3,457	360
Schuyler	-205	-396	-482	-757	-1,013	778	165
Steuben	-1,299	-2,478	-3,299	-5,800	-6,228	5,168	772
Tioga	-672	-1,581	-2,190	-2,897	-4,160	2,084	240
Tompkins	332	1,736	3,081	-71	-5,515	3,809	468
Western New York	-8,947	-23,062	-29,721	-47,400	-89,213	52,176	3,107
Allegany	634	2,581	2,229	2,417	-2,301	3,223	492
Cattaraugus	-59	119	-976	-1,063	-5,373	3,854	494
Chautauqua	-309	-352	-1,815	-2,856	-8,622	5,076	576
Erie	-7,223	-20,481	-22,607	-35,711	-59,557	29,366	425
Niagara	-1,990	-4,928	-6,553	-10,187	-13,359	10,655	1,120

Sources: Claritas, 2006; Center for Health Workforce Studies adjusted Cornell University Program on Applied Demographics population projections vintage April 2008.

Table 5 – Projected Percentage Population Change by Age Group, Region, and County, 2006-2030

	Under 5	5-14	15-24	25-44	45-64	65-84	85 and Older
Capital District	-6.2%	-8.7%	-9.4%	-7.9%	-16.8%	51.2%	32.0%
Albany	-4.3%	-7.1%	-6.3%	-6.8%	-19.2%	47.7%	28.4%
Columbia	-25.7%	-25.1%	-29.8%	-20.9%	-25.9%	37.2%	30.3%
Greene	-6.2%	-4.9%	-5.6%	8.7%	-8.7%	53.7%	52.3%
Rensselaer	-11.0%	-13.7%	-12.8%	-15.6%	-25.6%	40.3%	17.3%
Saratoga	3.5%	-0.6%	-0.9%	-0.2%	-3.0%	90.2%	64.0%
Schenectady	-15.0%	-16.4%	-16.7%	-15.5%	-24.5%	28.2%	-0.7%
Warren	-1.5%	-1.0%	-4.4%	-5.4%	-13.4%	56.8%	66.6%
Washington	-2.1%	-7.1%	-15.6%	-8.5%	-14.5%	41.7%	48.6%
Central New York	-9.4%	-10.9%	-12.9%	-12.7%	-26.3%	37.2%	29.3%
Cayuga	-17.6%	-17.5%	-24.4%	-16.1%	-23.6%	40.4%	23.2%
Cortland	1.7%	6.4%	-2.3%	-5.7%	-27.3%	33.9%	36.5%
Onondaga	-11.7%	-15.1%	-15.0%	-14.3%	-27.8%	31.3%	29.4%
Oswego	1.0%	2.8%	-4.2%	-7.4%	-22.1%	60.7%	31.8%
Finger Lakes	-3.0%	-4.6%	-7.8%	-4.4%	-18.2%	50.6%	26.9%
Genesee	-14.2%	-17.6%	-24.1%	-20.2%	-22.5%	51.9%	12.4%
Livingston	6.0%	9.1%	1.3%	7.1%	-14.7%	50.0%	35.5%
Monroe	-2.6%	-4.6%	-6.9%	-4.0%	-20.1%	46.3%	21.0%
Ontario	-0.2%	-4.0%	-8.3%	-7.3%	-19.7%	70.0%	52.1%
Orleans	6.4%	7.4%	-5.0%	4.4%	-2.8%	62.1%	38.6%
Seneca	-29.8%	-26.1%	-24.2%	-20.1%	-25.6%	23.7%	39.2%
Wayne	1.3%	-0.6%	-6.1%	0.6%	-9.6%	58.2%	26.0%
Wyoming	-24.5%	-22.6%	-25.2%	-12.1%	-16.0%	60.9%	62.3%
Yates	12.6%	9.9%	15.1%	9.4%	-8.2%	62.5%	44.3%
Hudson Valley	4.8%	-0.9%	-0.7%	3.6%	-5.4%	49.1%	45.9%
Dutchess	9.3%	3.8%	-0.4%	5.2%	-7.9%	59.6%	64.1%
Orange	20.7%	17.9%	12.9%	20.0%	2.3%	75.9%	55.4%
Putnam	13.5%	6.0%	3.1%	8.6%	4.5%	89.6%	90.1%
Rockland	-2.7%	-12.2%	-8.9%	-7.3%	-11.5%	37.3%	82.4%
Sullivan	23.9%	25.7%	9.1%	14.7%	1.2%	55.1%	52.4%
Ulster	18.3%	20.3%	8.0%	17.0%	-2.8%	62.2%	44.6%
Westchester	-4.4%	-13.1%	-8.0%	-4.7%	-7.8%	35.3%	28.3%
Long Island	0.3%	-10.9%	-9.5%	-4.4%	-11.7%	39.4%	47.6%
Nassau	0.3%	-12.2%	-11.2%	-5.6%	-14.5%	25.2%	30.6%
Suffolk	0.4%	-9.7%	-8.0%	-3.5%	-9.0%	54.7%	67.5%

Table 5 – Projected Percentage Population Change by Age Group, Region, and County, 2006-2030 (cont.)

	Under 5	5-14	15-24	25-44	45-64	65-84	85 and Older
Mohawk Valley	-10.2%	-9.8%	-13.0%	-11.1%	-22.1%	32.8%	15.5%
Fulton	-20.6%	-19.6%	-20.9%	-19.0%	-19.3%	53.7%	7.9%
Herkimer	-24.0%	-20.5%	-25.8%	-25.4%	-24.0%	30.0%	15.0%
Madison	6.9%	5.3%	1.0%	-2.4%	-22.4%	38.5%	28.3%
Montgomery	-33.9%	-31.7%	-34.0%	-33.6%	-27.7%	22.9%	-1.3%
Oneida	-3.6%	-3.9%	-9.6%	-2.8%	-19.9%	29.4%	17.9%
Schoharie	-9.7%	-14.9%	-10.6%	-17.2%	-30.0%	35.3%	29.3%
New York City	3.1%	5.0%	6.6%	2.5%	10.3%	60.5%	29.7%
Bronx	7.6%	10.3%	12.8%	8.8%	10.2%	55.3%	34.2%
Kings	-5.1%	-3.6%	-1.4%	-5.1%	2.9%	46.1%	11.3%
New York	-12.6%	-7.7%	-3.8%	-13.3%	0.5%	64.5%	30.4%
Queens	15.4%	14.0%	15.3%	15.9%	23.5%	67.2%	33.9%
Richmond	27.0%	24.3%	19.4%	23.8%	16.5%	100.3%	96.9%
North Country	3.8%	8.3%	-0.1%	5.1%	-12.9%	44.2%	28.6%
Clinton	20.3%	23.3%	5.6%	13.8%	-9.8%	53.8%	56.6%
Essex	-7.6%	-5.3%	-12.6%	0.8%	-5.7%	47.4%	32.1%
Franklin	-3.0%	2.8%	-1.0%	18.3%	15.8%	69.2%	33.1%
Hamilton	-18.8%	-12.4%	-21.2%	-21.4%	-21.8%	43.1%	21.4%
Jefferson	1.0%	1.7%	-0.7%	3.0%	-14.7%	24.5%	-5.7%
Lewis	-16.0%	-12.3%	-22.6%	-19.0%	-18.2%	47.3%	20.0%
St. Lawrence	8.5%	18.6%	5.1%	1.1%	-27.8%	41.3%	44.8%
Southern Tier	-6.1%	-4.4%	-6.1%	-8.6%	-22.3%	34.9%	22.3%
Broome	10.8%	5.7%	-1.2%	3.3%	-14.4%	33.5%	11.1%
Chemung	-25.7%	-23.6%	-22.7%	-21.3%	-29.4%	22.1%	7.6%
Chenango	-17.2%	-15.4%	-23.9%	-20.6%	-23.7%	34.7%	30.1%
Delaware	-5.8%	-2.1%	-7.5%	-13.2%	-30.6%	35.7%	44.4%
Otsego	15.9%	22.9%	7.8%	9.0%	-19.2%	43.5%	25.0%
Schuyler	-20.2%	-16.3%	-16.6%	-16.0%	-18.4%	29.8%	41.2%
Steuben	-23.1%	-19.3%	-23.8%	-23.5%	-23.5%	40.1%	35.8%
Tioga	-23.0%	-23.4%	-29.5%	-23.1%	-28.9%	32.1%	27.7%
Tompkins	7.7%	18.1%	10.7%	-0.3%	-24.5%	45.1%	29.6%
Western New York	-11.2%	-12.9%	-14.4%	-13.1%	-24.0%	27.7%	9.3%
Allegany	24.1%	44.0%	19.6%	20.8%	-19.1%	52.3%	48.1%
Cattaraugus	-1.2%	1.1%	-7.2%	-5.4%	-24.5%	36.5%	28.2%
Chautauqua	-4.2%	-2.1%	-8.3%	-8.6%	-24.4%	27.6%	16.7%
Erie	-13.7%	-17.4%	-17.6%	-14.8%	-24.4%	23.5%	1.9%
Niagara	-16.6%	-18.0%	-21.2%	-18.4%	-22.8%	37.4%	22.4%

Sources: Claritas, 2006; Center for Health Workforce Studies adjusted Cornell University Program on Applied Demographics population projections vintage April 2008.

Appendix 2: Regional Specialty-Specific Physician Supply Forecasts

Physician Supply Forecast Scenarios and Assumptions

The generic assumptions of all of the supply scenarios were that the capacity to train physicians in New York would remain constant over the forecast period; physician specialization patterns would remain consistent with recent trends among physicians in the state; and physician retirement rates controlling for age, gender, location of medical school, and specialty would remain consistent with recent trends. Below the additional assumptions from each scenario are described.

In the first supply scenario, considered the baseline supply scenario, it was further assumed that: 1) the net migration of physicians to the state would remain constant over the forecast period, and 2) nurse practitioners (NPs) and physician assistants (PAs) would grow at the same rate as physicians over the forecast period.

In the second supply scenario, in addition to the generic assumptions, it was assumed that: 1) the net migration of physicians to the state would remain constant over the forecast period, and 2) NPs and PAs would grow more quickly than physicians. Within this scenario, two NP/PA growth rates were modeled: 1) the same rate they grew between 2002 and 2008 (adding nearly 1,000 new practitioners annually); and 2) half the rate they grew between 2002 and 2008 (adding about 500 new practitioners annually) over the forecast period.

In the third supply scenario, in addition to the generic assumptions, it was assumed that: 1) the net migration of physicians to the state would change over the forecast period, and 2) NPs and PAs would grow at the same rate as physicians over the forecast period. Within this scenario, two net migration alternatives were modeled. The first alternative was that the state will retain 100 additional physicians annually beginning in 2009. This alternative closely paralleled the goals of New York State Department of Health's recently implemented *Doctors Across New York* program. The first alternative was further explored by modeling three potential specialty distributions for these additional 100 physicians: 1) 33 percent primary care/67 percent non-primary care, 2) 25 percent primary care/75 percent non-primary care, and 3) 20 percent primary care/80 percent non-primary care. Recently, the distribution for new physicians was approximately 27 percent primary care and 73 percent non-primary care. The second alternative was that the state would retain 100 fewer physicians annually beginning in 2009. This alternative portrayed the potential outcome of increased competition for physicians among states given the national physician shortage context.

In addition to the scenarios described above, an additional parameter was manipulated in the regional forecasts: the effect of changes in anticipated demand on physicians' practice location decisions. The first regional supply forecast assumed that the geographic distribution of physicians in the state would remain constant over the forecast period; that is, changes in the regional distribution of demand would have no effect on physicians' practice location decisions. The second regional supply forecast assumed that the geographic distribution of physicians in the state would be responsive to anticipated changes in demand; that is, physicians would move into areas at a greater rate where physician demand is growing and leave areas at a greater rate where demand is declining or not growing as quickly as in other regions.

Capital District Physician Supply, 2006 – 2030

Capital District Supply Scenario 1: Baseline (Supply Not Responsive to Demand)

Figure 1 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,184	299.5
2015	3,290	309.6
2020	3,351	316.4
2025	3,374	321.1
2030	3,377	325.7
Percent change 2006-2030	10.0%	12.8%
Annualized change 2006-2030	0.40%	0.50%

Figure 2 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,065	100.2	2010	2,119	199.3
2015	1,089	102.5	2015	2,200	207.0
2020	1,095	103.4	2020	2,256	213.0
2025	1,083	103.1	2025	2,290	218.0
2030	1,061	102.4	2030	2,315	223.4
Percent change 2006-2030	3.5%	6.2%	Percent change 2006-2030	13.2%	16.1%
Annualized change 2006-2030	0.14%	0.25%	Annualized change 2006-2030	0.52%	0.62%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 3 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,065	100.2	2010	420	39.5
2015	1,089	102.5	2015	430	40.5
2020	1,095	103.4	2020	429	40.5
2025	1,083	103.1	2025	420	40.0
2030	1,061	102.4	2030	404	39.0
Percent change 2006-2030	3.5%	6.2%	Percent change 2006-2030	-1.2%	1.4%
Annualized change 2006-2030	0.14%	0.25%	Annualized change 2006-2030	-0.05%	0.06%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	421	39.6	2010	223	21.0
2015	429	40.4	2015	230	21.6
2020	431	40.7	2020	235	22.2
2025	426	40.5	2025	238	22.6
2030	417	40.2	2030	240	23.2
Percent change 2006-2030	4.0%	6.7%	Percent change 2006-2030	11.6%	14.5%
Annualized change 2006-2030	0.16%	0.27%	Annualized change 2006-2030	0.46%	0.57%

Non-Primary Care Specialties

Figure 4 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	9.5	2006	343	32.2
2010	106	10.0	2010	368	34.6
2015	114	10.8	2015	406	38.2
2020	121	11.5	2020	440	41.5
2025	127	12.1	2025	467	44.5
2030	132	12.8	2030	493	47.5
Percent change 2006-2030	31.0%	34.4%	Percent change 2006-2030	43.6%	47.4%
Annualized change 2006-2030	1.13%	1.24%	Annualized change 2006-2030	1.52%	1.63%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	135	12.7	2006	80	7.5
2010	139	13.1	2010	76	7.2
2015	143	13.4	2015	72	6.8
2020	144	13.6	2020	68	6.5
2025	143	13.6	2025	64	6.1
2030	142	13.7	2030	60	5.8
Percent change 2006-2030	5.1%	7.8%	Percent change 2006-2030	-25.0%	-23.1%
Annualized change 2006-2030	0.21%	0.31%	Annualized change 2006-2030	-1.19%	-1.09%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	188	17.7	2006	137	12.9
2010	186	17.5	2010	142	13.4
2015	182	17.2	2015	143	13.5
2020	175	16.5	2020	148	14.0
2025	167	15.9	2025	151	14.4
2030	160	15.4	2030	151	14.6
Percent change 2006-2030	-15.0%	-12.8%	Percent change 2006-2030	10.6%	13.4%
Annualized change 2006-2030	-0.68%	-0.57%	Annualized change 2006-2030	0.42%	0.53%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	163	15.3	2006	153	14.4
2010	174	16.4	2010	169	15.9
2015	183	17.2	2015	190	17.9
2020	188	17.7	2020	210	19.8
2025	191	18.2	2025	227	21.6
2030	194	18.7	2030	241	23.2
Percent change 2006-2030	19.0%	22.1%	Percent change 2006-2030	57.2%	61.3%
Annualized change 2006-2030	0.73%	0.83%	Annualized change 2006-2030	1.90%	2.01%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	113	10.7
2020	116	11.0
2025	119	11.3
2030	121	11.7
Percent change 2006-2030	17.3%	20.3%
Annualized change 2006-2030	0.67%	0.77%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	95	9.0
2015	92	8.7
2020	88	8.3
2025	83	7.9
2030	79	7.7
Percent change 2006-2030	-18.9%	-16.8%
Annualized change 2006-2030	-0.87%	-0.76%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	34	3.2
2025	33	3.2
2030	32	3.1
Percent change 2006-2030	-6.0%	-3.6%
Annualized change 2006-2030	-0.26%	-0.15%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	9.0
2015	97	9.2
2020	99	9.4
2025	100	9.6
2030	102	9.8
Percent change 2006-2030	10.4%	13.3%
Annualized change 2006-2030	0.41%	0.52%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	49	4.6
2020	47	4.4
2025	45	4.3
2030	43	4.2
Percent change 2006-2030	-18.8%	-16.7%
Annualized change 2006-2030	-0.86%	-0.76%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.5
2015	77	7.3
2020	76	7.1
2025	73	6.9
2030	69	6.7
Percent change 2006-2030	-13.1%	-10.9%
Annualized change 2006-2030	-0.59%	-0.48%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	296	27.8
2015	302	28.4
2020	302	28.5
2025	299	28.5
2030	297	28.6
Percent change 2006-2030	3.8%	6.4%
Annualized change 2006-2030	0.15%	0.26%

Capital District Supply Scenario 1: Baseline (Supply Responsive to Demand)

Figure 5 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,171	298.2
2015	3,261	306.8
2020	3,304	311.9
2025	3,301	314.2
2030	3,262	314.6
Percent change 2006-2030	6.2%	9.0%
Annualized change 2006-2030	0.25%	0.36%

Figure 6 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,056	99.3	2010	2,115	198.9
2015	1,072	100.9	2015	2,189	206.0
2020	1,068	100.8	2020	2,236	211.1
2025	1,046	99.6	2025	2,255	214.6
2030	1,008	97.2	2030	2,254	217.4
Percent change 2006-2030	-1.6%	0.9%	Percent change 2006-2030	10.1%	13.0%
Annualized change 2006-2030	-0.07%	0.04%	Annualized change 2006-2030	0.40%	0.51%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 7 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,056	99.3	2010	418	39.3
2015	1,072	100.9	2015	425	40.0
2020	1,068	100.8	2020	422	39.8
2025	1,046	99.6	2025	409	39.0
2030	1,008	97.2	2030	389	37.5
Percent change 2006-2030	-1.6%	0.9%	Percent change 2006-2030	-4.9%	-2.4%
Annualized change 2006-2030	-0.07%	0.04%	Annualized change 2006-2030	-0.21%	-0.10%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	419	39.4	2010	218	20.5
2015	424	39.9	2015	223	21.0
2020	422	39.9	2020	224	21.2
2025	413	39.3	2025	224	21.3
2030	398	38.4	2030	221	21.4
Percent change 2006-2030	-0.8%	1.7%	Percent change 2006-2030	3.0%	5.6%
Annualized change 2006-2030	-0.04%	0.07%	Annualized change 2006-2030	0.12%	0.23%

Non-Primary Care Specialties

Figure 8 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	9.5	2006	343	32.2
2010	106	10.0	2010	368	34.6
2015	116	10.9	2015	408	38.3
2020	124	11.7	2020	440	41.5
2025	128	12.2	2025	464	44.2
2030	133	12.8	2030	483	46.6
Percent change 2006-2030	31.6%	35.0%	Percent change 2006-2030	40.8%	44.4%
Annualized change 2006-2030	1.15%	1.26%	Annualized change 2006-2030	1.44%	1.54%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	135	12.7	2006	80	7.5
2010	138	13.0	2010	76	7.2
2015	139	13.1	2015	72	6.8
2020	138	13.0	2020	68	6.4
2025	135	12.9	2025	63	6.0
2030	132	12.8	2030	59	5.7
Percent change 2006-2030	-2.0%	0.6%	Percent change 2006-2030	-26.7%	-24.8%
Annualized change 2006-2030	-0.08%	0.02%	Annualized change 2006-2030	-1.29%	-1.18%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	188	17.7	2006	137	12.9
2010	184	17.3	2010	142	13.4
2015	178	16.7	2015	143	13.4
2020	168	15.9	2020	149	14.1
2025	158	15.1	2025	151	14.4
2030	150	14.4	2030	150	14.5
Percent change 2006-2030	-20.4%	-18.4%	Percent change 2006-2030	9.5%	12.4%
Annualized change 2006-2030	-0.95%	-0.84%	Annualized change 2006-2030	0.38%	0.49%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	163	15.3	2006	153	14.4
2010	174	16.4	2010	167	15.7
2015	183	17.2	2015	188	17.6
2020	188	17.7	2020	205	19.4
2025	191	18.2	2025	220	20.9
2030	192	18.5	2030	231	22.3
Percent change 2006-2030	17.7%	20.7%	Percent change 2006-2030	51.0%	54.9%
Annualized change 2006-2030	0.68%	0.79%	Annualized change 2006-2030	1.73%	1.84%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	113	10.6
2020	115	10.9
2025	117	11.1
2030	117	11.3
Percent change 2006-2030	13.5%	16.5%
Annualized change 2006-2030	0.53%	0.64%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.0
2015	92	8.6
2020	88	8.3
2025	83	7.9
2030	78	7.6
Percent change 2006-2030	-19.9%	-17.8%
Annualized change 2006-2030	-0.92%	-0.82%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	33	3.1
2025	33	3.1
2030	31	3.0
Percent change 2006-2030	-8.0%	-5.6%
Annualized change 2006-2030	-0.35%	-0.24%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	9.0
2015	98	9.2
2020	99	9.3
2025	100	9.5
2030	100	9.6
Percent change 2006-2030	8.3%	11.1%
Annualized change 2006-2030	0.33%	0.44%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	49	4.6
2020	47	4.4
2025	45	4.3
2030	42	4.1
Percent change 2006-2030	-19.9%	-17.8%
Annualized change 2006-2030	-0.92%	-0.81%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.4
2015	78	7.3
2020	75	7.1
2025	72	6.8
2030	68	6.5
Percent change 2006-2030	-15.6%	-13.4%
Annualized change 2006-2030	-0.70%	-0.60%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	295	27.8
2015	300	28.2
2020	298	28.2
2025	294	28.0
2030	288	27.8
Percent change 2006-2030	0.7%	3.3%
Annualized change 2006-2030	0.03%	0.14%

Capital District Supply Scenario 2a: NP/PA High Growth (Supply Not Responsive to Demand)

Figure 9 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,251	305.8
2015	3,432	322.9
2020	3,568	336.9
2025	3,667	349.0
2030	3,752	361.9
Percent change 2006-2030	22.2%	25.3%
Annualized change 2006-2030	0.84%	0.95%

Figure 10 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,100	103.5	2010	2,150	202.3
2015	1,162	109.3	2015	2,270	213.6
2020	1,205	113.8	2020	2,362	223.1
2025	1,233	117.4	2025	2,434	231.6
2030	1,253	120.9	2030	2,498	241.0
Percent change 2006-2030	22.3%	25.4%	Percent change 2006-2030	22.1%	25.3%
Annualized change 2006-2030	0.84%	0.95%	Annualized change 2006-2030	0.84%	0.94%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 11 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,100	103.5	2010	434	40.9
2015	1,162	109.3	2015	459	43.2
2020	1,205	113.8	2020	473	44.6
2025	1,233	117.4	2025	478	45.5
2030	1,253	120.9	2030	477	46.0
Percent change 2006-2030	22.3%	25.4%	Percent change 2006-2030	16.7%	19.7%
Annualized change 2006-2030	0.84%	0.95%	Annualized change 2006-2030	0.65%	0.75%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	435	41.0	2010	231	21.7
2015	458	43.1	2015	245	23.1
2020	474	44.8	2020	258	24.4
2025	485	46.1	2025	270	25.7
2030	492	47.5	2030	283	27.3
Percent change 2006-2030	22.8%	26.0%	Percent change 2006-2030	31.9%	35.3%
Annualized change 2006-2030	0.86%	0.97%	Annualized change 2006-2030	1.16%	1.27%

Non-Primary Care Specialties

Figure 12 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	107	10.1
2015	118	11.1
2020	127	12.0
2025	135	12.8
2030	143	13.8
Percent change 2006-2030	41.3%	45.0%
Annualized change 2006-2030	1.45%	1.56%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	374	35.1
2015	419	39.5
2020	461	43.5
2025	497	47.3
2030	532	51.3
Percent change 2006-2030	55.0%	59.0%
Annualized change 2006-2030	1.84%	1.95%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	141	13.3
2015	147	13.8
2020	150	14.2
2025	152	14.5
2030	153	14.8
Percent change 2006-2030	13.4%	16.3%
Annualized change 2006-2030	0.52%	0.63%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	77	7.3
2015	75	7.0
2020	72	6.8
2025	68	6.5
2030	65	6.2
Percent change 2006-2030	-19.1%	-17.0%
Annualized change 2006-2030	-0.88%	-0.77%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	188	17.7
2015	188	17.7
2020	183	17.3
2025	177	16.9
2030	172	16.6
Percent change 2006-2030	-8.3%	-6.0%
Annualized change 2006-2030	-0.36%	-0.26%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	144	13.6
2015	148	13.9
2020	155	14.7
2025	160	15.3
2030	163	15.8
Percent change 2006-2030	19.3%	22.4%
Annualized change 2006-2030	0.74%	0.85%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	177	16.6
2015	189	17.8
2020	197	18.6
2025	203	19.4
2030	209	20.2
Percent change 2006-2030	28.4%	31.7%
Annualized change 2006-2030	1.05%	1.15%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	171	16.1
2015	197	18.5
2020	220	20.8
2025	241	22.9
2030	260	25.0
Percent change 2006-2030	69.7%	74.1%
Annualized change 2006-2030	2.23%	2.34%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	110	10.3
2015	117	11.0
2020	122	11.5
2025	126	12.0
2030	130	12.6
Percent change 2006-2030	26.5%	29.8%
Annualized change 2006-2030	0.98%	1.09%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	97	9.1
2015	95	8.9
2020	92	8.7
2025	89	8.4
2030	86	8.3
Percent change 2006-2030	-12.5%	-10.2%
Annualized change 2006-2030	-0.56%	-0.45%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	35	3.3
2015	35	3.3
2020	35	3.3
2025	35	3.3
2030	34	3.3
Percent change 2006-2030	1.4%	4.0%
Annualized change 2006-2030	0.06%	0.16%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	97	9.1
2015	101	9.5
2020	104	9.8
2025	107	10.2
2030	110	10.6
Percent change 2006-2030	19.1%	22.2%
Annualized change 2006-2030	0.73%	0.84%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	51	4.8
2020	49	4.6
2025	48	4.6
2030	46	4.5
Percent change 2006-2030	-12.3%	-10.1%
Annualized change 2006-2030	-0.55%	-0.44%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	80	7.6
2015	80	7.5
2020	79	7.5
2025	77	7.4
2030	75	7.2
Percent change 2006-2030	-6.3%	-3.8%
Annualized change 2006-2030	-0.27%	-0.16%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	300	28.2
2015	311	29.3
2020	316	29.9
2025	318	30.3
2030	320	30.9
Percent change 2006-2030	11.9%	14.8%
Annualized change 2006-2030	0.47%	0.58%

Capital District Supply Scenario 2a: NP/PA High Growth (Supply Responsive to Demand)

Figure 13 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,234	304.2
2015	3,402	320.1
2020	3,520	332.3
2025	3,590	341.7
2030	3,624	349.5
Percent change 2006-2030	18.0%	21.1%
Annualized change 2006-2030	0.69%	0.80%

Figure 14 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,086	102.2	2010	2,148	202.1
2015	1,139	107.2	2015	2,263	212.9
2020	1,170	110.5	2020	2,350	221.8
2025	1,182	112.5	2025	2,408	229.2
2030	1,177	113.5	2030	2,447	236.0
Percent change 2006-2030	14.8%	17.8%	Percent change 2006-2030	19.6%	22.7%
Annualized change 2006-2030	0.58%	0.68%	Annualized change 2006-2030	0.75%	0.86%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 15 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,086	102.2	2010	430	40.4
2015	1,139	107.2	2015	452	42.5
2020	1,170	110.5	2020	462	43.6
2025	1,182	112.5	2025	463	44.0
2030	1,177	113.5	2030	454	43.8
Percent change 2006-2030	14.8%	17.8%	Percent change 2006-2030	11.1%	13.9%
Annualized change 2006-2030	0.58%	0.68%	Annualized change 2006-2030	0.44%	0.55%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	432	40.6	2010	225	21.1
2015	450	42.4	2015	237	22.3
2020	463	43.7	2020	246	23.2
2025	466	44.4	2025	253	24.1
2030	464	44.8	2030	258	24.9
Percent change 2006-2030	15.8%	18.8%	Percent change 2006-2030	20.2%	23.3%
Annualized change 2006-2030	0.61%	0.72%	Annualized change 2006-2030	0.77%	0.88%

Non-Primary Care Specialties

Figure 16 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	108	10.2
2015	120	11.3
2020	130	12.3
2025	137	13.0
2030	144	13.9
Percent change 2006-2030	42.9%	46.6%
Annualized change 2006-2030	1.50%	1.61%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	373	35.1
2015	421	39.6
2020	462	43.7
2025	496	47.2
2030	524	50.6
Percent change 2006-2030	52.9%	56.8%
Annualized change 2006-2030	1.78%	1.89%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	140	13.2
2015	144	13.5
2020	145	13.7
2025	145	13.8
2030	144	13.9
Percent change 2006-2030	6.4%	9.2%
Annualized change 2006-2030	0.26%	0.37%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	78	7.3
2015	74	7.0
2020	71	6.7
2025	68	6.4
2030	64	6.1
Percent change 2006-2030	-20.4%	-18.4%
Annualized change 2006-2030	-0.95%	-0.84%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	187	17.6
2015	184	17.3
2020	177	16.7
2025	169	16.1
2030	162	15.7
Percent change 2006-2030	-13.6%	-11.4%
Annualized change 2006-2030	-0.61%	-0.50%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	144	13.6
2015	148	13.9
2020	156	14.8
2025	161	15.4
2030	163	15.7
Percent change 2006-2030	18.9%	22.0%
Annualized change 2006-2030	0.72%	0.83%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	177	16.6
2015	189	17.8
2020	198	18.6
2025	204	19.4
2030	208	20.1
Percent change 2006-2030	27.8%	31.1%
Annualized change 2006-2030	1.03%	1.13%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	170	16.0
2015	194	18.2
2020	215	20.3
2025	235	22.3
2030	251	24.2
Percent change 2006-2030	63.9%	68.2%
Annualized change 2006-2030	2.08%	2.19%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	110	10.4
2015	116	10.9
2020	121	11.4
2025	125	11.9
2030	127	12.2
Percent change 2006-2030	23.3%	26.5%
Annualized change 2006-2030	0.88%	0.98%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	97	9.2
2015	95	8.9
2020	93	8.8
2025	89	8.4
2030	85	8.2
Percent change 2006-2030	-13.0%	-10.8%
Annualized change 2006-2030	-0.58%	-0.47%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	35	3.3
2020	35	3.3
2025	35	3.3
2030	34	3.3
Percent change 2006-2030	-0.1%	2.5%
Annualized change 2006-2030	0.00%	0.10%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	97	9.1
2015	101	9.5
2020	104	9.8
2025	107	10.2
2030	108	10.4
Percent change 2006-2030	17.6%	20.6%
Annualized change 2006-2030	0.68%	0.78%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	53	5.0
2015	51	4.8
2020	49	4.7
2025	48	4.6
2030	46	4.4
Percent change 2006-2030	-13.0%	-10.7%
Annualized change 2006-2030	-0.58%	-0.47%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	80	7.5
2015	80	7.5
2020	79	7.5
2025	76	7.3
2030	73	7.1
Percent change 2006-2030	-8.3%	-5.9%
Annualized change 2006-2030	-0.36%	-0.25%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	300	28.2
2015	310	29.2
2020	314	29.6
2025	314	29.9
2030	313	30.2
Percent change 2006-2030	9.3%	12.2%
Annualized change 2006-2030	0.37%	0.48%

Capital District Supply Scenario 2b: NP/PA Lower Growth (Supply Not Responsive to Demand)

Figure 17 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,233	304.1
2015	3,369	317.0
2020	3,461	326.7
2025	3,515	334.6
2030	3,555	342.9
Percent change 2006-2030	15.8%	18.8%
Annualized change 2006-2030	0.61%	0.72%

Figure 18 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,092	102.7	2010	2,141	201.4
2015	1,132	106.6	2015	2,237	210.5
2020	1,155	109.0	2020	2,306	217.7
2025	1,162	110.6	2025	2,354	224.0
2030	1,161	111.9	2030	2,395	231.0
Percent change 2006-2030	13.2%	16.2%	Percent change 2006-2030	17.0%	20.1%
Annualized change 2006-2030	0.52%	0.63%	Annualized change 2006-2030	0.66%	0.77%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 19 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,092	102.7	2010	431	40.5
2015	1,132	106.6	2015	447	42.1
2020	1,155	109.0	2020	453	42.8
2025	1,162	110.6	2025	450	42.9
2030	1,161	111.9	2030	442	42.6
Percent change 2006-2030	13.2%	16.2%	Percent change 2006-2030	8.1%	10.9%
Annualized change 2006-2030	0.52%	0.63%	Annualized change 2006-2030	0.32%	0.43%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	432	40.6	2010	229	21.5
2015	446	42.0	2015	239	22.5
2020	454	42.9	2020	248	23.4
2025	457	43.5	2025	255	24.2
2030	456	44.0	2030	262	25.3
Percent change 2006-2030	13.7%	16.7%	Percent change 2006-2030	22.1%	25.3%
Annualized change 2006-2030	0.54%	0.64%	Annualized change 2006-2030	0.84%	0.94%

Non-Primary Care Specialties

Figure 20 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	107	10.1
2015	116	10.9
2020	124	11.7
2025	130	12.4
2030	137	13.2
Percent change 2006-2030	35.5%	39.0%
Annualized change 2006-2030	1.27%	1.38%

Obstetrics and Gynecology

Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	140	13.2
2015	145	13.6
2020	147	13.9
2025	147	14.0
2030	147	14.2
Percent change 2006-2030	8.7%	11.5%
Annualized change 2006-2030	0.35%	0.45%

Psychiatry

Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	187	17.6
2015	185	17.5
2020	179	16.9
2025	171	16.3
2030	165	15.9
Percent change 2006-2030	-12.1%	-9.9%
Annualized change 2006-2030	-0.54%	-0.43%

Radiology

Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	176	16.6
2015	186	17.5
2020	192	18.1
2025	197	18.7
2030	201	19.3
Percent change 2006-2030	23.0%	26.2%
Annualized change 2006-2030	0.87%	0.98%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	109	10.3
2015	115	10.9
2020	119	11.2
2025	122	11.6
2030	125	12.0
Percent change 2006-2030	21.3%	24.4%
Annualized change 2006-2030	0.81%	0.91%

Other Internal Medicine Subspecialties

Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	372	35.0
2015	413	38.9
2020	450	42.5
2025	480	45.7
2030	509	49.1
Percent change 2006-2030	48.5%	52.4%
Annualized change 2006-2030	1.66%	1.77%

Pathology

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	77	7.3
2015	74	6.9
2020	70	6.6
2025	66	6.3
2030	62	6.0
Percent change 2006-2030	-22.5%	-20.5%
Annualized change 2006-2030	-1.06%	-0.95%

Anesthesiology

Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	143	13.5
2015	145	13.7
2020	151	14.3
2025	155	14.8
2030	157	15.1
Percent change 2006-2030	14.3%	17.3%
Annualized change 2006-2030	0.56%	0.67%

Emergency Medicine

Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	170	16.0
2015	194	18.2
2020	215	20.3
2025	233	22.2
2030	249	24.0
Percent change 2006-2030	62.6%	66.8%
Annualized change 2006-2030	2.05%	2.16%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.1
2015	93	8.8
2020	90	8.5
2025	86	8.1
2030	82	7.9
Percent change 2006-2030	-16.1%	-14.0%
Annualized change 2006-2030	-0.73%	-0.62%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	35	3.3
2020	34	3.2
2025	34	3.2
2030	33	3.2
Percent change 2006-2030	-2.8%	-0.3%
Annualized change 2006-2030	-0.12%	-0.01%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	96	9.0
2015	99	9.3
2020	101	9.6
2025	103	9.8
2030	105	10.1
Percent change 2006-2030	14.2%	17.1%
Annualized change 2006-2030	0.55%	0.66%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	50	4.7
2020	48	4.5
2025	46	4.4
2030	45	4.3
Percent change 2006-2030	-16.0%	-13.8%
Annualized change 2006-2030	-0.72%	-0.62%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	80	7.5
2015	79	7.4
2020	77	7.3
2025	75	7.1
2030	72	6.9
Percent change 2006-2030	-10.2%	-7.8%
Annualized change 2006-2030	-0.45%	-0.34%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	299	28.1
2015	307	28.9
2020	309	29.1
2025	308	29.3
2030	307	29.6
Percent change 2006-2030	7.3%	10.1%
Annualized change 2006-2030	0.29%	0.40%

Capital District Supply Scenario 2b: NP/PA Lower Growth (Supply Responsive to Demand)

Figure 21 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,217	302.6
2015	3,340	314.3
2020	3,415	322.4
2025	3,442	327.6
2030	3,435	331.4
Percent change 2006-2030	11.9%	14.8%
Annualized change 2006-2030	0.47%	0.58%

Figure 22 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,078	101.4	2010	2,139	201.2
2015	1,110	104.5	2015	2,230	209.8
2020	1,121	105.9	2020	2,293	216.5
2025	1,113	106.0	2025	2,329	221.7
2030	1,090	105.1	2030	2,345	226.2
Percent change 2006-2030	6.3%	9.1%	Percent change 2006-2030	14.6%	17.6%
Annualized change 2006-2030	0.26%	0.36%	Annualized change 2006-2030	0.57%	0.68%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 23 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,078	101.4	2010	427	40.1
2015	1,110	104.5	2015	440	41.4
2020	1,121	105.9	2020	442	41.8
2025	1,113	106.0	2025	436	41.5
2030	1,090	105.1	2030	421	40.6
Percent change 2006-2030	6.3%	9.1%	Percent change 2006-2030	2.8%	5.5%
Annualized change 2006-2030	0.26%	0.36%	Annualized change 2006-2030	0.12%	0.22%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	428	40.3	2010	223	21.0
2015	439	41.3	2015	231	21.7
2020	443	41.9	2020	235	22.2
2025	439	41.8	2025	238	22.7
2030	430	41.5	2030	239	23.1
Percent change 2006-2030	7.2%	10.0%	Percent change 2006-2030	11.3%	14.2%
Annualized change 2006-2030	0.29%	0.40%	Annualized change 2006-2030	0.45%	0.55%

Non-Primary Care Specialties

Figure 24 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	108	10.1
2015	118	11.1
2020	127	12.0
2025	133	12.6
2030	138	13.3
Percent change 2006-2030	37.0%	40.5%
Annualized change 2006-2030	1.32%	1.43%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	372	35.0
2015	415	39.1
2020	451	42.6
2025	479	45.6
2030	503	48.5
Percent change 2006-2030	46.5%	50.3%
Annualized change 2006-2030	1.60%	1.71%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	140	13.1
2015	142	13.3
2020	142	13.4
2025	140	13.3
2030	138	13.3
Percent change 2006-2030	2.0%	4.7%
Annualized change 2006-2030	0.08%	0.19%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	77	7.3
2015	73	6.9
2020	69	6.5
2025	65	6.2
2030	61	5.9
Percent change 2006-2030	-23.7%	-21.8%
Annualized change 2006-2030	-1.12%	-1.02%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	186	17.5
2015	181	17.1
2020	173	16.3
2025	164	15.6
2030	156	15.0
Percent change 2006-2030	-17.2%	-15.0%
Annualized change 2006-2030	-0.78%	-0.68%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	144	13.5
2015	146	13.7
2020	153	14.4
2025	156	14.9
2030	156	15.1
Percent change 2006-2030	14.0%	16.9%
Annualized change 2006-2030	0.55%	0.65%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	176	16.6
2015	186	17.5
2020	193	18.2
2025	197	18.8
2030	200	19.3
Percent change 2006-2030	22.5%	25.7%
Annualized change 2006-2030	0.85%	0.96%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	169	15.9
2015	191	18.0
2020	210	19.9
2025	227	21.6
2030	240	23.2
Percent change 2006-2030	57.1%	61.2%
Annualized change 2006-2030	1.90%	2.01%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	110	10.3
2015	115	10.8
2020	118	11.1
2025	121	11.5
2030	122	11.7
Percent change 2006-2030	18.2%	21.2%
Annualized change 2006-2030	0.70%	0.81%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	97	9.1
2015	94	8.8
2020	91	8.6
2025	86	8.2
2030	82	7.9
Percent change 2006-2030	-16.7%	-14.5%
Annualized change 2006-2030	-0.76%	-0.65%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	35	3.3
2020	34	3.2
2025	34	3.2
2030	33	3.1
Percent change 2006-2030	-4.2%	-1.7%
Annualized change 2006-2030	-0.18%	-0.07%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	96	9.1
2015	99	9.4
2020	101	9.6
2025	103	9.8
2030	104	10.0
Percent change 2006-2030	12.7%	15.6%
Annualized change 2006-2030	0.50%	0.61%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	53	5.0
2015	50	4.7
2020	48	4.6
2025	47	4.4
2030	44	4.3
Percent change 2006-2030	-16.6%	-14.4%
Annualized change 2006-2030	-0.75%	-0.65%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	80	7.5
2015	79	7.4
2020	77	7.3
2025	74	7.0
2030	70	6.8
Percent change 2006-2030	-12.1%	-9.8%
Annualized change 2006-2030	-0.54%	-0.43%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	298	28.1
2015	306	28.8
2020	306	28.9
2025	303	28.9
2030	300	28.9
Percent change 2006-2030	4.8%	7.5%
Annualized change 2006-2030	0.20%	0.30%

Capital District Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 25 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,188	299.9
2015	3,314	311.9
2020	3,396	320.6
2025	3,439	327.3
2030	3,458	333.6
Percent change 2006-2030	12.6%	15.5%
Annualized change 2006-2030	0.50%	0.60%

Figure 26 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,067	100.3	2010	2,122	199.6
2015	1,098	103.3	2015	2,217	208.6
2020	1,110	104.8	2020	2,286	215.8
2025	1,105	105.2	2025	2,334	222.1
2030	1,088	105.0	2030	2,370	228.6
Percent change 2006-2030	6.2%	8.9%	Percent change 2006-2030	15.8%	18.8%
Annualized change 2006-2030	0.25%	0.36%	Annualized change 2006-2030	0.61%	0.72%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 27– Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,067	100.3	2010	421	39.6
2015	1,098	103.3	2015	433	40.8
2020	1,110	104.8	2020	435	41.1
2025	1,105	105.2	2025	428	40.8
2030	1,088	105.0	2030	415	40.0
Percent change 2006-2030	6.2%	8.9%	Percent change 2006-2030	1.3%	4.0%
Annualized change 2006-2030	0.25%	0.36%	Annualized change 2006-2030	0.06%	0.16%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	422	39.7	2010	224	21.0
2015	433	40.7	2015	232	21.8
2020	436	41.2	2020	238	22.5
2025	434	41.3	2025	242	23.1
2030	428	41.3	2030	246	23.7
Percent change 2006-2030	6.6%	9.4%	Percent change 2006-2030	14.5%	17.5%
Annualized change 2006-2030	0.27%	0.38%	Annualized change 2006-2030	0.57%	0.67%

Non-Primary Care Specialties

Figure 28 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	106	10.0
2015	115	10.8
2020	123	11.6
2025	129	12.3
2030	135	13.1
Percent change 2006-2030	34.1%	37.5%
Annualized change 2006-2030	1.23%	1.34%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	369	34.7
2015	409	38.5
2020	446	42.1
2025	476	45.3
2030	504	48.6
Percent change 2006-2030	47.0%	50.8%
Annualized change 2006-2030	1.62%	1.73%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	139	13.1
2015	144	13.5
2020	146	13.7
2025	146	13.9
2030	145	14.0
Percent change 2006-2030	7.6%	10.3%
Annualized change 2006-2030	0.30%	0.41%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	73	6.9
2020	69	6.5
2025	65	6.2
2030	61	5.9
Percent change 2006-2030	-23.3%	-21.3%
Annualized change 2006-2030	-1.10%	-0.99%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	186	17.5
2015	184	17.3
2020	177	16.7
2025	170	16.2
2030	163	15.8
Percent change 2006-2030	-13.1%	-10.8%
Annualized change 2006-2030	-0.58%	-0.47%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.4
2015	144	13.6
2020	150	14.2
2025	154	14.6
2030	155	15.0
Percent change 2006-2030	13.2%	16.1%
Annualized change 2006-2030	0.52%	0.62%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.4
2015	184	17.3
2020	190	18.0
2025	195	18.6
2030	198	19.1
Percent change 2006-2030	21.7%	24.9%
Annualized change 2006-2030	0.82%	0.93%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	169	15.9
2015	192	18.1
2020	213	20.1
2025	231	22.0
2030	246	23.8
Percent change 2006-2030	60.9%	65.1%
Annualized change 2006-2030	2.00%	2.11%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	114	10.8
2020	118	11.1
2025	121	11.5
2030	124	11.9
Percent change 2006-2030	20.0%	23.1%
Annualized change 2006-2030	0.76%	0.87%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.0
2015	93	8.7
2020	89	8.4
2025	85	8.1
2030	81	7.8
Percent change 2006-2030	-17.0%	-14.9%
Annualized change 2006-2030	-0.77%	-0.67%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	35	3.3
2020	34	3.2
2025	34	3.2
2030	33	3.2
Percent change 2006-2030	-3.8%	-1.3%
Annualized change 2006-2030	-0.16%	-0.06%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	9.0
2015	98	9.2
2020	101	9.5
2025	102	9.7
2030	104	10.0
Percent change 2006-2030	13.0%	15.9%
Annualized change 2006-2030	0.51%	0.62%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	50	4.7
2020	48	4.5
2025	46	4.4
2030	44	4.3
Percent change 2006-2030	-16.9%	-14.7%
Annualized change 2006-2030	-0.77%	-0.66%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.5
2015	78	7.3
2020	77	7.2
2025	74	7.1
2030	71	6.9
Percent change 2006-2030	-11.1%	-8.8%
Annualized change 2006-2030	-0.49%	-0.38%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	296	27.9
2015	304	28.6
2020	306	28.9
2025	305	29.0
2030	304	29.3
Percent change 2006-2030	6.2%	8.9%
Annualized change 2006-2030	0.25%	0.36%

Capital District Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 29 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,175	298.6
2015	3,284	309.0
2020	3,347	316.0
2025	3,364	320.2
2030	3,340	322.2
Percent change 2006-2030	8.8%	11.6%
Annualized change 2006-2030	0.35%	0.46%

Figure 30 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,057	99.4	2010	2,118	199.2
2015	1,080	101.6	2015	2,204	207.4
2020	1,082	102.2	2020	2,264	213.8
2025	1,067	101.6	2025	2,297	218.6
2030	1,034	99.8	2030	2,306	222.4
Percent change 2006-2030	0.9%	3.5%	Percent change 2006-2030	12.7%	15.6%
Annualized change 2006-2030	0.04%	0.14%	Annualized change 2006-2030	0.50%	0.61%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 31– Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,057	99.4	2010	418	39.4
2015	1,080	101.6	2015	428	40.3
2020	1,082	102.2	2020	427	40.3
2025	1,067	101.6	2025	418	39.7
2030	1,034	99.8	2030	399	38.5
Percent change 2006-2030	0.9%	3.5%	Percent change 2006-2030	-2.4%	0.1%
Annualized change 2006-2030	0.04%	0.14%	Annualized change 2006-2030	-0.10%	0.01%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	420	39.5	2010	219	20.6
2015	427	40.2	2015	224	21.1
2020	428	40.4	2020	227	21.4
2025	421	40.1	2025	229	21.8
2030	408	39.4	2030	227	21.9
Percent change 2006-2030	1.7%	4.4%	Percent change 2006-2030	5.6%	8.4%
Annualized change 2006-2030	0.07%	0.18%	Annualized change 2006-2030	0.23%	0.34%

Non-Primary Care Specialties

Figure 32 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	107	10.0
2015	117	11.0
2020	125	11.8
2025	131	12.4
2030	136	13.1
Percent change 2006-2030	34.7%	38.2%
Annualized change 2006-2030	1.25%	1.36%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	368	34.6
2015	410	38.6
2020	446	42.1
2025	473	45.0
2030	494	47.7
Percent change 2006-2030	44.1%	47.8%
Annualized change 2006-2030	1.53%	1.64%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	138	13.0
2015	140	13.2
2020	140	13.2
2025	138	13.1
2030	135	13.1
Percent change 2006-2030	0.3%	2.9%
Annualized change 2006-2030	0.01%	0.12%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	72	6.8
2020	68	6.5
2025	64	6.1
2030	60	5.8
Percent change 2006-2030	-25.0%	-23.1%
Annualized change 2006-2030	-1.19%	-1.09%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	184	17.3
2015	179	16.9
2020	170	16.1
2025	161	15.4
2030	153	14.8
Percent change 2006-2030	-18.6%	-16.5%
Annualized change 2006-2030	-0.85%	-0.75%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.4
2015	144	13.5
2020	151	14.2
2025	154	14.6
2030	154	14.8
Percent change 2006-2030	12.1%	15.0%
Annualized change 2006-2030	0.48%	0.58%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.4
2015	184	17.3
2020	190	18.0
2025	195	18.5
2030	196	18.9
Percent change 2006-2030	20.4%	23.5%
Annualized change 2006-2030	0.78%	0.88%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	167	15.7
2015	189	17.8
2020	208	19.6
2025	224	21.3
2030	236	22.8
Percent change 2006-2030	54.5%	58.5%
Annualized change 2006-2030	1.83%	1.94%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	109	10.2
2015	113	10.7
2020	117	11.0
2025	119	11.3
2030	120	11.5
Percent change 2006-2030	16.2%	19.2%
Annualized change 2006-2030	0.63%	0.73%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.0
2015	92	8.7
2020	90	8.5
2025	85	8.1
2030	80	7.7
Percent change 2006-2030	-18.1%	-15.9%
Annualized change 2006-2030	-0.83%	-0.72%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	34	3.2
2025	34	3.2
2030	32	3.1
Percent change 2006-2030	-5.8%	-3.4%
Annualized change 2006-2030	-0.25%	-0.14%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	96	9.0
2015	98	9.3
2020	100	9.5
2025	102	9.7
2030	102	9.8
Percent change 2006-2030	10.8%	13.7%
Annualized change 2006-2030	0.43%	0.54%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	50	4.7
2020	48	4.5
2025	46	4.4
2030	43	4.2
Percent change 2006-2030	-18.0%	-15.9%
Annualized change 2006-2030	-0.82%	-0.72%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.4
2015	78	7.4
2020	76	7.2
2025	73	6.9
2030	69	6.7
Percent change 2006-2030	-13.6%	-11.3%
Annualized change 2006-2030	-0.61%	-0.50%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	296	27.8
2015	302	28.4
2020	302	28.5
2025	299	28.5
2030	295	28.4
Percent change 2006-2030	3.0%	5.7%
Annualized change 2006-2030	0.13%	0.23%

Capital District Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 33 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,188	299.9
2015	3,314	311.9
2020	3,396	320.6
2025	3,439	327.3
2030	3,458	333.6
Percent change 2006-2030	12.6%	15.5%
Annualized change 2006-2030	0.50%	0.60%

Figure 34 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,066	100.3	2010	2,122	199.6
2015	1,095	103.1	2015	2,219	208.8
2020	1,106	104.4	2020	2,290	216.2
2025	1,100	104.7	2025	2,339	222.6
2030	1,082	104.3	2030	2,377	229.2
Percent change 2006-2030	5.5%	8.3%	Percent change 2006-2030	16.2%	19.2%
Annualized change 2006-2030	0.22%	0.33%	Annualized change 2006-2030	0.63%	0.73%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 35– Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,066	100.3	2010	421	39.6
2015	1,095	103.1	2015	432	40.7
2020	1,106	104.4	2020	434	40.9
2025	1,100	104.7	2025	426	40.6
2030	1,082	104.3	2030	412	39.7
Percent change 2006-2030	5.5%	8.3%	Percent change 2006-2030	0.7%	3.3%
Annualized change 2006-2030	0.22%	0.33%	Annualized change 2006-2030	0.03%	0.14%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	422	39.7	2010	224	21.0
2015	432	40.6	2015	231	21.8
2020	435	41.1	2020	237	22.4
2025	432	41.1	2025	241	23.0
2030	425	41.0	2030	245	23.6
Percent change 2006-2030	6.0%	8.7%	Percent change 2006-2030	13.8%	16.7%
Annualized change 2006-2030	0.24%	0.35%	Annualized change 2006-2030	0.54%	0.65%

Non-Primary Care Specialties

Figure 36 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	106	10.0
2015	115	10.9
2020	123	11.6
2025	130	12.3
2030	136	13.1
Percent change 2006-2030	34.4%	37.9%
Annualized change 2006-2030	1.24%	1.35%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	369	34.7
2015	410	38.6
2020	447	42.2
2025	477	45.4
2030	506	48.8
Percent change 2006-2030	47.4%	51.2%
Annualized change 2006-2030	1.63%	1.74%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	139	13.1
2015	144	13.5
2020	146	13.8
2025	146	13.9
2030	146	14.0
Percent change 2006-2030	7.9%	10.7%
Annualized change 2006-2030	0.32%	0.42%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	73	6.9
2020	69	6.6
2025	66	6.2
2030	62	5.9
Percent change 2006-2030	-23.1%	-21.1%
Annualized change 2006-2030	-1.09%	-0.98%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	186	17.5
2015	184	17.3
2020	178	16.8
2025	170	16.2
2030	164	15.8
Percent change 2006-2030	-12.8%	-10.5%
Annualized change 2006-2030	-0.57%	-0.46%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.4
2015	144	13.6
2020	150	14.2
2025	154	14.7
2030	155	15.0
Percent change 2006-2030	13.5%	16.4%
Annualized change 2006-2030	0.53%	0.64%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.4
2015	184	17.4
2020	191	18.0
2025	195	18.6
2030	199	19.2
Percent change 2006-2030	22.1%	25.3%
Annualized change 2006-2030	0.84%	0.94%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	169	15.9
2015	192	18.1
2020	213	20.1
2025	232	22.1
2030	247	23.8
Percent change 2006-2030	61.4%	65.6%
Annualized change 2006-2030	2.01%	2.12%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	114	10.8
2020	118	11.1
2025	121	11.5
2030	124	12.0
Percent change 2006-2030	20.4%	23.5%
Annualized change 2006-2030	0.77%	0.88%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.0
2015	93	8.7
2020	89	8.4
2025	85	8.1
2030	82	7.9
Percent change 2006-2030	-16.8%	-14.6%
Annualized change 2006-2030	-0.76%	-0.66%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	35	3.3
2020	34	3.2
2025	34	3.2
2030	33	3.2
Percent change 2006-2030	-3.6%	-1.0%
Annualized change 2006-2030	-0.15%	-0.04%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	9.0
2015	98	9.2
2020	101	9.5
2025	103	9.8
2030	104	10.1
Percent change 2006-2030	13.3%	16.2%
Annualized change 2006-2030	0.52%	0.63%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	50	4.7
2020	48	4.5
2025	46	4.4
2030	44	4.3
Percent change 2006-2030	-16.6%	-14.5%
Annualized change 2006-2030	-0.75%	-0.65%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.5
2015	78	7.3
2020	77	7.2
2025	74	7.1
2030	71	6.9
Percent change 2006-2030	-10.8%	-8.5%
Annualized change 2006-2030	-0.48%	-0.37%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	296	27.9
2015	304	28.6
2020	306	28.9
2025	306	29.1
2030	305	29.4
Percent change 2006-2030	6.5%	9.3%
Annualized change 2006-2030	0.26%	0.37%

Capital District Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 37 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,175	298.6
2015	3,284	309.0
2020	3,347	316.0
2025	3,364	320.2
2030	3,340	322.2
Percent change 2006-2030	8.8%	11.6%
Annualized change 2006-2030	0.35%	0.46%

Figure 38 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,057	99.4	2010	2,118	199.2
2015	1,078	101.4	2015	2,206	207.6
2020	1,079	101.9	2020	2,268	214.1
2025	1,062	101.1	2025	2,302	219.1
2030	1,028	99.1	2030	2,313	223.1
Percent change 2006-2030	0.3%	2.9%	Percent change 2006-2030	13.0%	16.0%
Annualized change 2006-2030	0.01%	0.12%	Annualized change 2006-2030	0.51%	0.62%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 39– Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,057	99.4	2010	418	39.3
2015	1,078	101.4	2015	428	40.2
2020	1,079	101.9	2020	426	40.2
2025	1,062	101.1	2025	416	39.6
2030	1,028	99.1	2030	397	38.3
Percent change 2006-2030	0.3%	2.9%	Percent change 2006-2030	-3.0%	-0.5%
Annualized change 2006-2030	0.01%	0.12%	Annualized change 2006-2030	-0.13%	-0.02%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	420	39.5	2010	219	20.6
2015	426	40.1	2015	224	21.1
2020	427	40.3	2020	226	21.4
2025	419	39.9	2025	227	21.6
2030	405	39.1	2030	226	21.8
Percent change 2006-2030	1.1%	3.7%	Percent change 2006-2030	5.0%	7.7%
Annualized change 2006-2030	0.05%	0.15%	Annualized change 2006-2030	0.20%	0.31%

Non-Primary Care Specialties

Figure 40 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	107	10.0
2015	117	11.0
2020	126	11.9
2025	131	12.5
2030	136	13.2
Percent change 2006-2030	35.1%	38.6%
Annualized change 2006-2030	1.26%	1.37%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	368	34.6
2015	411	38.7
2020	446	42.1
2025	474	45.1
2030	496	47.8
Percent change 2006-2030	44.5%	48.2%
Annualized change 2006-2030	1.54%	1.65%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	138	13.0
2015	140	13.2
2020	140	13.2
2025	138	13.2
2030	136	13.1
Percent change 2006-2030	0.6%	3.2%
Annualized change 2006-2030	0.02%	0.13%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	72	6.8
2020	69	6.5
2025	65	6.1
2030	60	5.8
Percent change 2006-2030	-24.8%	-22.9%
Annualized change 2006-2030	-1.18%	-1.08%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	184	17.3
2015	179	16.9
2020	171	16.1
2025	162	15.4
2030	154	14.8
Percent change 2006-2030	-18.3%	-16.2%
Annualized change 2006-2030	-0.84%	-0.73%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.4
2015	144	13.5
2020	151	14.3
2025	154	14.7
2030	154	14.9
Percent change 2006-2030	12.4%	15.3%
Annualized change 2006-2030	0.49%	0.59%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.4
2015	184	17.4
2020	191	18.0
2025	195	18.6
2030	197	19.0
Percent change 2006-2030	20.8%	23.9%
Annualized change 2006-2030	0.79%	0.90%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	167	15.7
2015	189	17.8
2020	208	19.6
2025	224	21.4
2030	237	22.9
Percent change 2006-2030	54.9%	59.0%
Annualized change 2006-2030	1.84%	1.95%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	109	10.2
2015	113	10.7
2020	117	11.0
2025	119	11.3
2030	120	11.6
Percent change 2006-2030	16.5%	19.5%
Annualized change 2006-2030	0.64%	0.75%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.0
2015	93	8.7
2020	90	8.5
2025	85	8.1
2030	81	7.8
Percent change 2006-2030	-17.8%	-15.7%
Annualized change 2006-2030	-0.81%	-0.71%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	34	3.2
2025	34	3.2
2030	32	3.1
Percent change 2006-2030	-5.6%	-3.1%
Annualized change 2006-2030	-0.24%	-0.13%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	96	9.0
2015	98	9.3
2020	100	9.5
2025	102	9.7
2030	102	9.9
Percent change 2006-2030	11.1%	14.0%
Annualized change 2006-2030	0.44%	0.55%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	50	4.7
2020	48	4.5
2025	46	4.4
2030	44	4.2
Percent change 2006-2030	-17.8%	-15.6%
Annualized change 2006-2030	-0.81%	-0.71%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.4
2015	78	7.4
2020	76	7.2
2025	73	6.9
2030	69	6.7
Percent change 2006-2030	-13.3%	-11.1%
Annualized change 2006-2030	-0.60%	-0.49%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	296	27.8
2015	302	28.5
2020	303	28.6
2025	300	28.5
2030	296	28.5
Percent change 2006-2030	3.3%	6.0%
Annualized change 2006-2030	0.14%	0.24%

Capital District Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 41 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,188	299.9
2015	3,314	311.9
2020	3,396	320.6
2025	3,439	327.3
2030	3,458	333.6
Percent change 2006-2030	12.6%	15.5%
Annualized change 2006-2030	0.50%	0.60%

Figure 42 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,066	100.3	2010	2,122	199.6
2015	1,094	103.0	2015	2,220	208.9
2020	1,104	104.2	2020	2,292	216.4
2025	1,096	104.4	2025	2,343	223.0
2030	1,078	103.9	2030	2,381	229.6
Percent change 2006-2030	5.1%	7.9%	Percent change 2006-2030	16.4%	19.4%
Annualized change 2006-2030	0.21%	0.32%	Annualized change 2006-2030	0.63%	0.74%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 43 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,066	100.3	2010	421	39.6
2015	1,094	103.0	2015	432	40.6
2020	1,104	104.2	2020	433	40.9
2025	1,096	104.4	2025	425	40.5
2030	1,078	103.9	2030	410	39.6
Percent change 2006-2030	5.1%	7.9%	Percent change 2006-2030	0.3%	2.9%
Annualized change 2006-2030	0.21%	0.32%	Annualized change 2006-2030	0.01%	0.12%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	422	39.7	2010	224	21.0
2015	431	40.6	2015	231	21.7
2020	434	41.0	2020	237	22.3
2025	431	41.0	2025	240	22.9
2030	423	40.8	2030	244	23.5
Percent change 2006-2030	5.6%	8.3%	Percent change 2006-2030	13.4%	16.3%
Annualized change 2006-2030	0.23%	0.33%	Annualized change 2006-2030	0.52%	0.63%

Non-Primary Care Specialties

Figure 44 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	106	10.0
2015	115	10.9
2020	123	11.6
2025	130	12.3
2030	136	13.1
Percent change 2006-2030	34.7%	38.2%
Annualized change 2006-2030	1.25%	1.36%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	369	34.7
2015	410	38.6
2020	447	42.2
2025	478	45.5
2030	506	48.9
Percent change 2006-2030	47.7%	51.5%
Annualized change 2006-2030	1.64%	1.75%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	139	13.1
2015	144	13.5
2020	146	13.8
2025	146	13.9
2030	146	14.1
Percent change 2006-2030	8.0%	10.9%
Annualized change 2006-2030	0.32%	0.43%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	73	6.9
2020	70	6.6
2025	66	6.3
2030	62	5.9
Percent change 2006-2030	-22.9%	-20.9%
Annualized change 2006-2030	-1.08%	-0.97%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	186	17.5
2015	184	17.3
2020	178	16.8
2025	171	16.2
2030	164	15.8
Percent change 2006-2030	-12.7%	-10.4%
Annualized change 2006-2030	-0.56%	-0.46%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.4
2015	144	13.6
2020	151	14.2
2025	154	14.7
2030	156	15.0
Percent change 2006-2030	13.7%	16.6%
Annualized change 2006-2030	0.54%	0.64%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	175	16.4
2015	185	17.4
2020	191	18.0
2025	196	18.6
2030	199	19.2
Percent change 2006-2030	22.3%	25.5%
Annualized change 2006-2030	0.84%	0.95%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	169	15.9
2015	192	18.1
2020	213	20.1
2025	232	22.1
2030	247	23.9
Percent change 2006-2030	61.7%	65.9%
Annualized change 2006-2030	2.02%	2.13%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	114	10.8
2020	118	11.1
2025	121	11.6
2030	124	12.0
Percent change 2006-2030	20.6%	23.7%
Annualized change 2006-2030	0.78%	0.89%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.0
2015	93	8.7
2020	89	8.4
2025	85	8.1
2030	82	7.9
Percent change 2006-2030	-16.6%	-14.5%
Annualized change 2006-2030	-0.76%	-0.65%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	35	3.3
2020	34	3.2
2025	34	3.2
2030	33	3.2
Percent change 2006-2030	-3.4%	-0.9%
Annualized change 2006-2030	-0.14%	-0.04%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	9.0
2015	98	9.3
2020	101	9.5
2025	103	9.8
2030	104	10.1
Percent change 2006-2030	13.5%	16.4%
Annualized change 2006-2030	0.53%	0.64%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	50	4.7
2020	48	4.5
2025	46	4.4
2030	44	4.3
Percent change 2006-2030	-16.5%	-14.3%
Annualized change 2006-2030	-0.75%	-0.64%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.5
2015	78	7.4
2020	77	7.2
2025	74	7.1
2030	71	6.9
Percent change 2006-2030	-10.7%	-8.4%
Annualized change 2006-2030	-0.47%	-0.36%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	296	27.9
2015	304	28.6
2020	307	29.0
2025	306	29.1
2030	305	29.4
Percent change 2006-2030	6.7%	9.4%
Annualized change 2006-2030	0.27%	0.38%

Capital District Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 45 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,175	298.6
2015	3,284	309.0
2020	3,347	316.0
2025	3,364	320.2
2030	3,340	322.2
Percent change 2006-2030	8.8%	11.6%
Annualized change 2006-2030	0.35%	0.46%

Figure 46 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,056	99.4	2010	2,118	199.2
2015	1,077	101.3	2015	2,208	207.7
2020	1,077	101.7	2020	2,270	214.3
2025	1,059	100.8	2025	2,305	219.4
2030	1,024	98.8	2030	2,316	223.4
Percent change 2006-2030	-0.1%	2.5%	Percent change 2006-2030	13.2%	16.2%
Annualized change 2006-2030	0.00%	0.10%	Annualized change 2006-2030	0.52%	0.63%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 47 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,056	99.4	2010	418	39.3
2015	1,077	101.3	2015	427	40.2
2020	1,077	101.7	2020	425	40.1
2025	1,059	100.8	2025	414	39.4
2030	1,024	98.8	2030	395	38.1
Percent change 2006-2030	-0.1%	2.5%	Percent change 2006-2030	-3.4%	-0.9%
Annualized change 2006-2030	0.00%	0.10%	Annualized change 2006-2030	-0.14%	-0.04%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	420	39.5	2010	219	20.6
2015	426	40.1	2015	224	21.1
2020	426	40.2	2020	226	21.3
2025	418	39.8	2025	227	21.6
2030	404	39.0	2030	225	21.7
Percent change 2006-2030	0.7%	3.3%	Percent change 2006-2030	4.6%	7.3%
Annualized change 2006-2030	0.03%	0.14%	Annualized change 2006-2030	0.19%	0.29%

Non-Primary Care Specialties

Figure 48 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	107	10.0
2015	117	11.0
2020	126	11.9
2025	131	12.5
2030	137	13.2
Percent change 2006-2030	35.3%	38.8%
Annualized change 2006-2030	1.27%	1.38%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	368	34.6
2015	411	38.7
2020	447	42.2
2025	474	45.1
2030	496	47.9
Percent change 2006-2030	44.7%	48.5%
Annualized change 2006-2030	1.55%	1.66%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	138	13.0
2015	140	13.2
2020	140	13.2
2025	139	13.2
2030	136	13.1
Percent change 2006-2030	0.8%	3.4%
Annualized change 2006-2030	0.03%	0.14%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	77	7.2
2015	72	6.8
2020	69	6.5
2025	65	6.2
2030	60	5.8
Percent change 2006-2030	-24.7%	-22.7%
Annualized change 2006-2030	-1.17%	-1.07%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	184	17.3
2015	179	16.9
2020	171	16.1
2025	162	15.4
2030	154	14.8
Percent change 2006-2030	-18.2%	-16.1%
Annualized change 2006-2030	-0.83%	-0.73%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.4
2015	144	13.6
2020	151	14.3
2025	154	14.7
2030	154	14.9
Percent change 2006-2030	12.6%	15.5%
Annualized change 2006-2030	0.49%	0.60%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.4
2015	185	17.4
2020	191	18.0
2025	195	18.6
2030	197	19.0
Percent change 2006-2030	21.0%	24.1%
Annualized change 2006-2030	0.80%	0.90%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	167	15.7
2015	189	17.8
2020	208	19.7
2025	225	21.4
2030	237	22.9
Percent change 2006-2030	55.2%	59.2%
Annualized change 2006-2030	1.85%	1.96%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	109	10.2
2015	113	10.7
2020	117	11.0
2025	119	11.4
2030	120	11.6
Percent change 2006-2030	16.7%	19.7%
Annualized change 2006-2030	0.65%	0.75%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.0
2015	93	8.7
2020	90	8.5
2025	85	8.1
2030	81	7.8
Percent change 2006-2030	-17.7%	-15.5%
Annualized change 2006-2030	-0.81%	-0.70%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	34	3.2
2025	34	3.2
2030	32	3.1
Percent change 2006-2030	-5.4%	-2.9%
Annualized change 2006-2030	-0.23%	-0.12%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	96	9.0
2015	99	9.3
2020	100	9.5
2025	102	9.7
2030	102	9.9
Percent change 2006-2030	11.3%	14.2%
Annualized change 2006-2030	0.45%	0.55%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	50	4.7
2020	48	4.5
2025	46	4.4
2030	44	4.2
Percent change 2006-2030	-17.6%	-15.5%
Annualized change 2006-2030	-0.80%	-0.70%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.4
2015	78	7.4
2020	76	7.2
2025	73	7.0
2030	69	6.7
Percent change 2006-2030	-13.2%	-10.9%
Annualized change 2006-2030	-0.59%	-0.48%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	296	27.8
2015	303	28.5
2020	303	28.6
2025	300	28.6
2030	296	28.6
Percent change 2006-2030	3.5%	6.2%
Annualized change 2006-2030	0.14%	0.25%

Capital District Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 49 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,180	299.1
2015	3,265	307.3
2020	3,306	312.1
2025	3,309	314.9
2030	3,295	317.9
Percent change 2006-2030	7.3%	10.1%
Annualized change 2006-2030	0.29%	0.40%

Figure 50 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,064	100.1	2010	2,116	199.1
2015	1,081	101.7	2015	2,184	205.5
2020	1,080	101.9	2020	2,226	210.2
2025	1,062	101.1	2025	2,247	213.9
2030	1,034	99.8	2030	2,261	218.1
Percent change 2006-2030	0.9%	3.5%	Percent change 2006-2030	10.5%	13.4%
Annualized change 2006-2030	0.04%	0.14%	Annualized change 2006-2030	0.42%	0.52%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 51 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,064	100.1	2010	420	39.5
2015	1,081	101.7	2015	427	40.2
2020	1,080	101.9	2020	423	40.0
2025	1,062	101.1	2025	412	39.2
2030	1,034	99.8	2030	394	38.0
Percent change 2006-2030	0.9%	3.5%	Percent change 2006-2030	-3.7%	-1.2%
Annualized change 2006-2030	0.04%	0.14%	Annualized change 2006-2030	-0.16%	-0.05%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	421	39.6	2010	223	21.0
2015	426	40.1	2015	228	21.5
2020	425	40.1	2020	232	21.9
2025	417	39.7	2025	233	22.2
2030	406	39.2	2030	234	22.6
Percent change 2006-2030	1.3%	4.0%	Percent change 2006-2030	8.8%	11.6%
Annualized change 2006-2030	0.06%	0.16%	Annualized change 2006-2030	0.35%	0.46%

Non-Primary Care Specialties

Figure 52 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	106	9.9
2015	114	10.7
2020	120	11.3
2025	124	11.8
2030	129	12.5
Percent change 2006-2030	27.9%	31.2%
Annualized change 2006-2030	1.03%	1.14%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	368	34.6
2015	403	38.0
2020	434	41.0
2025	459	43.6
2030	481	46.4
Percent change 2006-2030	40.3%	43.9%
Annualized change 2006-2030	1.42%	1.53%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	139	13.1
2015	141	13.3
2020	142	13.4
2025	140	13.4
2030	139	13.4
Percent change 2006-2030	2.6%	5.3%
Annualized change 2006-2030	0.11%	0.22%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	72	6.8
2020	68	6.4
2025	63	6.0
2030	59	5.6
Percent change 2006-2030	-26.8%	-24.9%
Annualized change 2006-2030	-1.29%	-1.19%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	185	17.4
2015	181	17.0
2020	173	16.3
2025	164	15.6
2030	156	15.0
Percent change 2006-2030	-17.0%	-14.9%
Annualized change 2006-2030	-0.78%	-0.67%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.3
2015	142	13.4
2020	146	13.8
2025	148	14.1
2030	148	14.3
Percent change 2006-2030	8.0%	10.8%
Annualized change 2006-2030	0.32%	0.43%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.4
2015	182	17.1
2020	185	17.5
2025	188	17.9
2030	189	18.3
Percent change 2006-2030	16.2%	19.2%
Annualized change 2006-2030	0.63%	0.73%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	168	15.8
2015	189	17.8
2020	207	19.6
2025	223	21.2
2030	235	22.7
Percent change 2006-2030	53.6%	57.6%
Annualized change 2006-2030	1.80%	1.91%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	113	10.6
2020	115	10.8
2025	116	11.1
2030	118	11.4
Percent change 2006-2030	14.5%	17.5%
Annualized change 2006-2030	0.57%	0.67%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	95	9.0
2015	91	8.6
2020	87	8.2
2025	82	7.8
2030	78	7.5
Percent change 2006-2030	-20.8%	-18.8%
Annualized change 2006-2030	-0.97%	-0.86%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	33	3.1
2025	32	3.1
2030	31	3.0
Percent change 2006-2030	-8.2%	-5.8%
Annualized change 2006-2030	-0.36%	-0.25%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	8.9
2015	97	9.1
2020	98	9.2
2025	99	9.4
2030	99	9.6
Percent change 2006-2030	7.8%	10.6%
Annualized change 2006-2030	0.31%	0.42%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.8
2015	49	4.6
2020	46	4.4
2025	44	4.2
2030	42	4.1
Percent change 2006-2030	-20.7%	-18.6%
Annualized change 2006-2030	-0.96%	-0.85%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.4
2015	77	7.2
2020	75	7.0
2025	71	6.8
2030	68	6.5
Percent change 2006-2030	-15.2%	-13.0%
Annualized change 2006-2030	-0.68%	-0.58%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	295	27.8
2015	300	28.2
2020	298	28.1
2025	294	28.0
2030	290	28.0
Percent change 2006-2030	1.3%	4.0%
Annualized change 2006-2030	0.05%	0.16%

Capital District Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 53 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,167	297.9
2015	3,237	304.6
2020	3,260	307.8
2025	3,238	308.2
2030	3,183	307.0
Percent change 2006-2030	3.6%	6.3%
Annualized change 2006-2030	0.15%	0.26%

Figure 54 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,054	99.2	2010	2,112	198.7
2015	1,064	100.1	2015	2,173	204.5
2020	1,054	99.5	2020	2,207	208.4
2025	1,025	97.6	2025	2,213	210.6
2030	982	94.7	2030	2,201	212.3
Percent change 2006-2030	-4.2%	-1.7%	Percent change 2006-2030	7.6%	10.4%
Annualized change 2006-2030	-0.18%	-0.07%	Annualized change 2006-2030	0.30%	0.41%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 55 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,054	99.2	2010	417	39.3
2015	1,064	100.1	2015	422	39.7
2020	1,054	99.5	2020	416	39.3
2025	1,025	97.6	2025	401	38.2
2030	982	94.7	2030	379	36.6
Percent change 2006-2030	-4.2%	-1.7%	Percent change 2006-2030	-7.3%	-4.9%
Annualized change 2006-2030	-0.18%	-0.07%	Annualized change 2006-2030	-0.32%	-0.21%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	419	39.4	2010	218	20.5
2015	421	39.6	2015	221	20.8
2020	417	39.3	2020	221	20.9
2025	405	38.5	2025	220	20.9
2030	387	37.4	2030	216	20.8
Percent change 2006-2030	-3.4%	-0.9%	Percent change 2006-2030	0.3%	2.9%
Annualized change 2006-2030	-0.14%	-0.04%	Annualized change 2006-2030	0.01%	0.12%

Non-Primary Care Specialties

Figure 56 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	106	10.0
2015	115	10.9
2020	122	11.5
2025	126	12.0
2030	130	12.5
Percent change 2006-2030	28.6%	31.9%
Annualized change 2006-2030	1.05%	1.16%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	367	34.5
2015	405	38.1
2020	434	41.0
2025	455	43.3
2030	472	45.5
Percent change 2006-2030	37.5%	41.1%
Annualized change 2006-2030	1.34%	1.44%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	138	13.0
2015	138	13.0
2020	136	12.9
2025	133	12.7
2030	129	12.5
Percent change 2006-2030	-4.3%	-1.8%
Annualized change 2006-2030	-0.18%	-0.07%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	71	6.7
2020	67	6.3
2025	62	5.9
2030	57	5.5
Percent change 2006-2030	-28.4%	-26.6%
Annualized change 2006-2030	-1.38%	-1.28%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	184	17.3
2015	177	16.6
2020	166	15.7
2025	155	14.8
2030	146	14.1
Percent change 2006-2030	-22.3%	-20.3%
Annualized change 2006-2030	-1.04%	-0.94%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.3
2015	142	13.3
2020	147	13.9
2025	148	14.1
2030	147	14.1
Percent change 2006-2030	7.0%	9.7%
Annualized change 2006-2030	0.28%	0.39%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.4
2015	182	17.1
2020	186	17.5
2025	188	17.9
2030	187	18.1
Percent change 2006-2030	14.9%	17.9%
Annualized change 2006-2030	0.58%	0.69%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	167	15.7
2015	186	17.5
2020	202	19.1
2025	216	20.5
2030	226	21.8
Percent change 2006-2030	47.5%	51.3%
Annualized change 2006-2030	1.63%	1.74%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	112	10.5
2020	114	10.7
2025	115	10.9
2030	114	11.0
Percent change 2006-2030	10.9%	13.8%
Annualized change 2006-2030	0.43%	0.54%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.0
2015	91	8.6
2020	87	8.2
2025	82	7.8
2030	77	7.4
Percent change 2006-2030	-21.8%	-19.8%
Annualized change 2006-2030	-1.02%	-0.91%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	33	3.1
2025	32	3.1
2030	31	2.9
Percent change 2006-2030	-10.1%	-7.8%
Annualized change 2006-2030	-0.44%	-0.34%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	9.0
2015	97	9.1
2020	98	9.2
2025	98	9.4
2030	97	9.4
Percent change 2006-2030	5.8%	8.5%
Annualized change 2006-2030	0.23%	0.34%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	49	4.6
2020	46	4.4
2025	44	4.2
2030	41	4.0
Percent change 2006-2030	-21.7%	-19.7%
Annualized change 2006-2030	-1.02%	-0.91%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.4
2015	77	7.2
2020	74	7.0
2025	70	6.7
2030	66	6.4
Percent change 2006-2030	-17.5%	-15.4%
Annualized change 2006-2030	-0.80%	-0.69%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	295	27.7
2015	298	28.0
2020	295	27.8
2025	288	27.4
2030	281	27.1
Percent change 2006-2030	-1.6%	0.9%
Annualized change 2006-2030	-0.07%	0.04%

Capital District Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 57 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,180	299.1
2015	3,265	307.3
2020	3,306	312.1
2025	3,309	314.9
2030	3,295	317.9
Percent change 2006-2030	7.3%	10.1%
Annualized change 2006-2030	0.29%	0.40%

Figure 58 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,064	100.1	2010	2,116	199.0
2015	1,083	101.9	2015	2,182	205.3
2020	1,083	102.3	2020	2,223	209.8
2025	1,067	101.6	2025	2,242	213.4
2030	1,041	100.4	2030	2,254	217.5
Percent change 2006-2030	1.6%	4.2%	Percent change 2006-2030	10.2%	13.1%
Annualized change 2006-2030	0.06%	0.17%	Annualized change 2006-2030	0.41%	0.51%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 59 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,064	100.1	2010	420	39.5
2015	1,083	101.9	2015	428	40.2
2020	1,083	102.3	2020	425	40.1
2025	1,067	101.6	2025	414	39.4
2030	1,041	100.4	2030	396	38.2
Percent change 2006-2030	1.6%	4.2%	Percent change 2006-2030	-3.1%	-0.6%
Annualized change 2006-2030	0.06%	0.17%	Annualized change 2006-2030	-0.13%	-0.02%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	421	39.6	2010	223	21.0
2015	427	40.2	2015	229	21.5
2020	426	40.2	2020	232	21.9
2025	419	39.9	2025	234	22.3
2030	409	39.5	2030	235	22.7
Percent change 2006-2030	2.0%	4.6%	Percent change 2006-2030	9.5%	12.4%
Annualized change 2006-2030	0.08%	0.19%	Annualized change 2006-2030	0.38%	0.49%

Non-Primary Care Specialties

Figure 60 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	106	9.9
2015	113	10.7
2020	120	11.3
2025	124	11.8
2030	129	12.4
Percent change 2006-2030	27.5%	30.8%
Annualized change 2006-2030	1.02%	1.13%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	368	34.6
2015	403	37.9
2020	433	40.9
2025	457	43.5
2030	480	46.3
Percent change 2006-2030	39.8%	43.5%
Annualized change 2006-2030	1.41%	1.52%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	139	13.1
2015	141	13.3
2020	142	13.4
2025	140	13.3
2030	138	13.3
Percent change 2006-2030	2.3%	5.0%
Annualized change 2006-2030	0.10%	0.20%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	72	6.8
2020	67	6.4
2025	63	6.0
2030	58	5.6
Percent change 2006-2030	-27.0%	-25.1%
Annualized change 2006-2030	-1.30%	-1.20%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	185	17.4
2015	181	17.0
2020	172	16.3
2025	163	15.5
2030	156	15.0
Percent change 2006-2030	-17.3%	-15.1%
Annualized change 2006-2030	-0.79%	-0.68%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.3
2015	142	13.3
2020	146	13.8
2025	148	14.1
2030	147	14.2
Percent change 2006-2030	7.6%	10.4%
Annualized change 2006-2030	0.31%	0.41%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.4
2015	181	17.1
2020	185	17.5
2025	187	17.8
2030	189	18.2
Percent change 2006-2030	15.8%	18.8%
Annualized change 2006-2030	0.61%	0.72%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	168	15.8
2015	189	17.8
2020	207	19.5
2025	222	21.1
2030	234	22.6
Percent change 2006-2030	53.1%	57.1%
Annualized change 2006-2030	1.79%	1.90%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	112	10.6
2020	114	10.8
2025	116	11.1
2030	118	11.3
Percent change 2006-2030	14.2%	17.1%
Annualized change 2006-2030	0.55%	0.66%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	95	9.0
2015	91	8.6
2020	87	8.2
2025	82	7.8
2030	77	7.5
Percent change 2006-2030	-21.1%	-19.0%
Annualized change 2006-2030	-0.98%	-0.87%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	33	3.1
2025	32	3.1
2030	31	3.0
Percent change 2006-2030	-8.5%	-6.1%
Annualized change 2006-2030	-0.37%	-0.26%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	8.9
2015	97	9.1
2020	98	9.2
2025	98	9.4
2030	99	9.5
Percent change 2006-2030	7.5%	10.3%
Annualized change 2006-2030	0.30%	0.41%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.8
2015	49	4.6
2020	46	4.4
2025	44	4.2
2030	42	4.0
Percent change 2006-2030	-20.9%	-18.8%
Annualized change 2006-2030	-0.97%	-0.87%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.4
2015	77	7.2
2020	74	7.0
2025	71	6.8
2030	68	6.5
Percent change 2006-2030	-15.4%	-13.2%
Annualized change 2006-2030	-0.70%	-0.59%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	295	27.8
2015	299	28.2
2020	297	28.1
2025	293	27.9
2030	289	27.9
Percent change 2006-2030	1.0%	3.6%
Annualized change 2006-2030	0.04%	0.15%

Capital District Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 61 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,167	297.9
2015	3,237	304.6
2020	3,260	307.8
2025	3,238	308.2
2030	3,183	307.0
Percent change 2006-2030	3.6%	6.3%
Annualized change 2006-2030	0.15%	0.26%

Figure 62 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,055	99.2	2010	2,112	198.7
2015	1,066	100.3	2015	2,171	204.3
2020	1,057	99.8	2020	2,203	208.0
2025	1,031	98.1	2025	2,208	210.1
2030	988	95.3	2030	2,195	211.7
Percent change 2006-2030	-3.6%	-1.1%	Percent change 2006-2030	7.3%	10.0%
Annualized change 2006-2030	-0.15%	-0.04%	Annualized change 2006-2030	0.29%	0.40%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 63 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,055	99.2	2010	418	39.3
2015	1,066	100.3	2015	423	39.8
2020	1,057	99.8	2020	417	39.4
2025	1,031	98.1	2025	403	38.4
2030	988	95.3	2030	382	36.8
Percent change 2006-2030	-3.6%	-1.1%	Percent change 2006-2030	-6.7%	-4.3%
Annualized change 2006-2030	-0.15%	-0.04%	Annualized change 2006-2030	-0.29%	-0.18%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	419	39.4	2010	218	20.5
2015	422	39.7	2015	222	20.8
2020	418	39.5	2020	222	21.0
2025	407	38.7	2025	221	21.0
2030	390	37.6	2030	217	20.9
Percent change 2006-2030	-2.8%	-0.2%	Percent change 2006-2030	1.0%	3.6%
Annualized change 2006-2030	-0.12%	-0.01%	Annualized change 2006-2030	0.04%	0.15%

Non-Primary Care Specialties

Figure 64 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	106	10.0
2015	115	10.8
2020	122	11.5
2025	126	12.0
2030	129	12.5
Percent change 2006-2030	28.2%	31.5%
Annualized change 2006-2030	1.04%	1.15%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	367	34.5
2015	404	38.0
2020	434	40.9
2025	454	43.2
2030	470	45.4
Percent change 2006-2030	37.1%	40.7%
Annualized change 2006-2030	1.32%	1.43%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	138	13.0
2015	138	13.0
2020	136	12.8
2025	133	12.6
2030	129	12.4
Percent change 2006-2030	-4.5%	-2.1%
Annualized change 2006-2030	-0.19%	-0.09%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	71	6.7
2020	67	6.3
2025	62	5.9
2030	57	5.5
Percent change 2006-2030	-28.7%	-26.8%
Annualized change 2006-2030	-1.40%	-1.29%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	184	17.3
2015	177	16.6
2020	166	15.7
2025	155	14.8
2030	146	14.1
Percent change 2006-2030	-22.5%	-20.5%
Annualized change 2006-2030	-1.06%	-0.95%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.3
2015	142	13.3
2020	147	13.9
2025	148	14.1
2030	146	14.1
Percent change 2006-2030	6.6%	9.4%
Annualized change 2006-2030	0.27%	0.38%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.3
2015	182	17.1
2020	185	17.5
2025	187	17.8
2030	187	18.0
Percent change 2006-2030	14.6%	17.6%
Annualized change 2006-2030	0.57%	0.68%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	167	15.7
2015	186	17.5
2020	202	19.1
2025	215	20.5
2030	225	21.7
Percent change 2006-2030	47.0%	50.8%
Annualized change 2006-2030	1.62%	1.73%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	112	10.5
2020	113	10.7
2025	114	10.9
2030	114	11.0
Percent change 2006-2030	10.6%	13.4%
Annualized change 2006-2030	0.42%	0.53%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.0
2015	91	8.6
2020	87	8.2
2025	81	7.7
2030	76	7.4
Percent change 2006-2030	-22.0%	-20.0%
Annualized change 2006-2030	-1.03%	-0.92%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	33	3.1
2025	32	3.1
2030	30	2.9
Percent change 2006-2030	-10.4%	-8.0%
Annualized change 2006-2030	-0.46%	-0.35%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	9.0
2015	97	9.1
2020	97	9.2
2025	98	9.3
2030	97	9.4
Percent change 2006-2030	5.4%	8.2%
Annualized change 2006-2030	0.22%	0.33%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	49	4.6
2020	46	4.4
2025	44	4.2
2030	41	4.0
Percent change 2006-2030	-22.0%	-19.9%
Annualized change 2006-2030	-1.03%	-0.92%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.4
2015	77	7.2
2020	74	7.0
2025	70	6.7
2030	66	6.3
Percent change 2006-2030	-17.8%	-15.6%
Annualized change 2006-2030	-0.81%	-0.71%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	295	27.7
2015	298	28.0
2020	294	27.8
2025	288	27.4
2030	280	27.1
Percent change 2006-2030	-1.9%	0.6%
Annualized change 2006-2030	-0.08%	0.03%

Capital District Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 65 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,180	299.1
2015	3,265	307.3
2020	3,306	312.1
2025	3,309	314.9
2030	3,295	317.9
Percent change 2006-2030	7.3%	10.1%
Annualized change 2006-2030	0.29%	0.40%

Figure 66 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,064	100.1	2010	2,116	199.0
2015	1,085	102.0	2015	2,181	205.2
2020	1,086	102.5	2020	2,220	209.6
2025	1,070	101.9	2025	2,238	213.0
2030	1,045	100.8	2030	2,250	217.1
Percent change 2006-2030	1.9%	4.6%	Percent change 2006-2030	10.0%	12.8%
Annualized change 2006-2030	0.08%	0.19%	Annualized change 2006-2030	0.40%	0.50%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 67 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,064	100.1	2010	420	39.5
2015	1,085	102.0	2015	428	40.3
2020	1,086	102.5	2020	426	40.2
2025	1,070	101.9	2025	415	39.5
2030	1,045	100.8	2030	398	38.4
Percent change 2006-2030	1.9%	4.6%	Percent change 2006-2030	-2.7%	-0.2%
Annualized change 2006-2030	0.08%	0.19%	Annualized change 2006-2030	-0.11%	-0.01%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	421	39.6	2010	223	21.0
2015	427	40.2	2015	229	21.5
2020	427	40.3	2020	233	22.0
2025	421	40.0	2025	235	22.3
2030	411	39.6	2030	236	22.8
Percent change 2006-2030	2.4%	5.1%	Percent change 2006-2030	9.9%	12.8%
Annualized change 2006-2030	0.10%	0.21%	Annualized change 2006-2030	0.40%	0.50%

Non-Primary Care Specialties

Figure 68 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	106	9.9
2015	113	10.7
2020	119	11.3
2025	124	11.8
2030	129	12.4
Percent change 2006-2030	27.3%	30.6%
Annualized change 2006-2030	1.01%	1.12%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	368	34.6
2015	403	37.9
2020	433	40.9
2025	457	43.5
2030	479	46.2
Percent change 2006-2030	39.6%	43.2%
Annualized change 2006-2030	1.40%	1.51%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	139	13.0
2015	141	13.3
2020	141	13.4
2025	140	13.3
2030	138	13.3
Percent change 2006-2030	2.1%	4.8%
Annualized change 2006-2030	0.09%	0.20%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	72	6.7
2020	67	6.4
2025	63	6.0
2030	58	5.6
Percent change 2006-2030	-27.2%	-25.3%
Annualized change 2006-2030	-1.31%	-1.21%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	185	17.4
2015	181	17.0
2020	172	16.3
2025	163	15.5
2030	155	15.0
Percent change 2006-2030	-17.4%	-15.3%
Annualized change 2006-2030	-0.80%	-0.69%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.3
2015	142	13.3
2020	146	13.8
2025	148	14.0
2030	147	14.2
Percent change 2006-2030	7.5%	10.2%
Annualized change 2006-2030	0.30%	0.41%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.4
2015	181	17.1
2020	185	17.5
2025	187	17.8
2030	188	18.2
Percent change 2006-2030	15.6%	18.6%
Annualized change 2006-2030	0.61%	0.71%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	168	15.8
2015	189	17.8
2020	207	19.5
2025	222	21.1
2030	234	22.6
Percent change 2006-2030	52.8%	56.8%
Annualized change 2006-2030	1.78%	1.89%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	112	10.6
2020	114	10.8
2025	116	11.0
2030	117	11.3
Percent change 2006-2030	14.0%	16.9%
Annualized change 2006-2030	0.55%	0.65%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	95	9.0
2015	91	8.6
2020	87	8.2
2025	81	7.8
2030	77	7.4
Percent change 2006-2030	-21.2%	-19.1%
Annualized change 2006-2030	-0.99%	-0.88%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	33	3.1
2025	32	3.1
2030	31	3.0
Percent change 2006-2030	-8.7%	-6.3%
Annualized change 2006-2030	-0.38%	-0.27%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	8.9
2015	97	9.1
2020	98	9.2
2025	98	9.3
2030	99	9.5
Percent change 2006-2030	7.3%	10.1%
Annualized change 2006-2030	0.29%	0.40%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.8
2015	49	4.6
2020	46	4.4
2025	44	4.2
2030	42	4.0
Percent change 2006-2030	-21.0%	-19.0%
Annualized change 2006-2030	-0.98%	-0.87%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.4
2015	77	7.2
2020	74	7.0
2025	71	6.8
2030	68	6.5
Percent change 2006-2030	-15.6%	-13.4%
Annualized change 2006-2030	-0.70%	-0.60%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	295	27.8
2015	299	28.1
2020	297	28.1
2025	293	27.9
2030	288	27.8
Percent change 2006-2030	0.8%	3.5%
Annualized change 2006-2030	0.03%	0.14%

Capital District Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 69 – Capital District Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,071	288.7
2010	3,167	297.9
2015	3,237	304.6
2020	3,260	307.8
2025	3,238	308.2
2030	3,183	307.0
Percent change 2006-2030	3.6%	6.3%
Annualized change 2006-2030	0.15%	0.26%

Figure 70 – Capital District Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care physicians			Non Primary Care physicians		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,055	99.2	2010	2,112	198.6
2015	1,067	100.4	2015	2,170	204.2
2020	1,059	100.0	2020	2,201	207.8
2025	1,034	98.4	2025	2,204	209.8
2030	992	95.7	2030	2,191	211.3
Percent change 2006-2030	-3.2%	-0.7%	Percent change 2006-2030	7.1%	9.9%
Annualized change 2006-2030	-0.13%	-0.03%	Annualized change 2006-2030	0.29%	0.39%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 71 – Capital District Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care physicians			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,055	99.2	2010	418	39.3
2015	1,067	100.4	2015	423	39.8
2020	1,059	100.0	2020	418	39.5
2025	1,034	98.4	2025	404	38.5
2030	992	95.7	2030	383	36.9
Percent change 2006-2030	-3.2%	-0.7%	Percent change 2006-2030	-6.3%	-3.9%
Annualized change 2006-2030	-0.13%	-0.03%	Annualized change 2006-2030	-0.27%	-0.17%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	419	39.4	2010	218	20.5
2015	422	39.7	2015	222	20.9
2020	419	39.5	2020	222	21.0
2025	408	38.8	2025	221	21.1
2030	391	37.8	2030	218	21.0
Percent change 2006-2030	-2.4%	0.1%	Percent change 2006-2030	1.4%	4.0%
Annualized change 2006-2030	-0.10%	0.01%	Annualized change 2006-2030	0.06%	0.16%

Non-Primary Care Specialties

Figure 72 – Capital District Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	101	9.5
2010	106	10.0
2015	115	10.8
2020	122	11.5
2025	125	11.9
2030	129	12.5
Percent change 2006-2030	27.9%	31.3%
Annualized change 2006-2030	1.03%	1.14%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	343	32.2
2010	367	34.5
2015	404	38.0
2020	433	40.9
2025	454	43.2
2030	469	45.3
Percent change 2006-2030	36.9%	40.4%
Annualized change 2006-2030	1.32%	1.42%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	135	12.7
2010	138	13.0
2015	138	13.0
2020	136	12.8
2025	132	12.6
2030	129	12.4
Percent change 2006-2030	-4.7%	-2.2%
Annualized change 2006-2030	-0.20%	-0.09%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	76	7.2
2015	71	6.7
2020	67	6.3
2025	62	5.9
2030	57	5.5
Percent change 2006-2030	-28.8%	-26.9%
Annualized change 2006-2030	-1.40%	-1.30%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	188	17.7
2010	184	17.3
2015	176	16.6
2020	166	15.6
2025	155	14.7
2030	145	14.0
Percent change 2006-2030	-22.6%	-20.6%
Annualized change 2006-2030	-1.06%	-0.96%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	137	12.9
2010	142	13.3
2015	142	13.3
2020	147	13.8
2025	148	14.1
2030	146	14.1
Percent change 2006-2030	6.5%	9.2%
Annualized change 2006-2030	0.26%	0.37%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	163	15.3
2010	174	16.3
2015	181	17.1
2020	185	17.5
2025	187	17.8
2030	186	18.0
Percent change 2006-2030	14.4%	17.4%
Annualized change 2006-2030	0.56%	0.67%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	153	14.4
2010	167	15.7
2015	186	17.5
2020	202	19.1
2025	215	20.5
2030	225	21.7
Percent change 2006-2030	46.8%	50.6%
Annualized change 2006-2030	1.61%	1.72%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	103	9.7
2010	108	10.2
2015	112	10.5
2020	113	10.7
2025	114	10.9
2030	114	11.0
Percent change 2006-2030	10.4%	13.2%
Annualized change 2006-2030	0.41%	0.52%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	98	9.2
2010	96	9.0
2015	91	8.6
2020	87	8.2
2025	81	7.7
2030	76	7.4
Percent change 2006-2030	-22.2%	-20.1%
Annualized change 2006-2030	-1.04%	-0.93%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	33	3.1
2025	32	3.1
2030	30	2.9
Percent change 2006-2030	-10.5%	-8.2%
Annualized change 2006-2030	-0.46%	-0.36%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	92	8.6
2010	95	9.0
2015	97	9.1
2020	97	9.2
2025	98	9.3
2030	97	9.3
Percent change 2006-2030	5.2%	8.0%
Annualized change 2006-2030	0.21%	0.32%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	53	5.0
2010	52	4.9
2015	49	4.6
2020	46	4.4
2025	44	4.2
2030	41	4.0
Percent change 2006-2030	-22.1%	-20.1%
Annualized change 2006-2030	-1.04%	-0.93%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	80	7.5
2010	79	7.4
2015	77	7.2
2020	74	7.0
2025	70	6.7
2030	66	6.3
Percent change 2006-2030	-17.9%	-15.8%
Annualized change 2006-2030	-0.82%	-0.71%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	286	26.9
2010	295	27.7
2015	297	28.0
2020	294	27.7
2025	287	27.3
2030	280	27.0
Percent change 2006-2030	-2.1%	0.4%
Annualized change 2006-2030	-0.09%	0.02%

Central New York Physician Supply, 2006 – 2030
Central New York Supply Scenario 1: Baseline (Supply Not Responsive to Demand)

Figure 73 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,316	327.6
2015	2,394	343.9
2020	2,441	357.1
2025	2,461	368.3
2030	2,466	379.4
Percent change 2006-2030	10.4%	21.7%
Annualized change 2006-2030	0.41%	0.82%

Figure 74 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	690	97.6	2010	1,626	230.0
2015	706	101.4	2015	1,688	242.5
2020	710	103.8	2020	1,731	253.3
2025	703	105.2	2025	1,758	263.1
2030	689	106.0	2030	1,777	273.4
Percent change 2006-2030	3.8%	14.4%	Percent change 2006-2030	13.3%	24.8%
Annualized change 2006-2030	0.16%	0.56%	Annualized change 2006-2030	0.52%	0.93%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 75 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	690	97.6	2010	263	37.2
2015	706	101.4	2015	269	38.7
2020	710	103.8	2020	269	39.3
2025	703	105.2	2025	263	39.3
2030	689	106.0	2030	253	38.9
Percent change 2006-2030	3.8%	14.4%	Percent change 2006-2030	-1.2%	8.9%
Annualized change 2006-2030	0.16%	0.56%	Annualized change 2006-2030	-0.05%	0.35%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	263	37.2	2010	164	23.2
2015	268	38.5	2015	169	24.3
2020	268	39.3	2020	173	25.2
2025	265	39.7	2025	175	26.1
2030	260	40.0	2030	176	27.1
Percent change 2006-2030	4.0%	14.5%	Percent change 2006-2030	11.6%	23.0%
Annualized change 2006-2030	0.16%	0.57%	Annualized change 2006-2030	0.46%	0.87%

Non-Primary Care Specialties

Figure 76 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	74	10.5
2015	80	11.5
2020	85	12.5
2025	89	13.3
2030	93	14.3
Percent change 2006-2030	31.0%	44.3%
Annualized change 2006-2030	1.13%	1.54%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	270	38.3
2015	299	42.9
2020	323	47.3
2025	343	51.4
2030	362	55.7
Percent change 2006-2030	43.6%	58.2%
Annualized change 2006-2030	1.52%	1.93%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	119	16.9
2015	122	17.6
2020	123	18.1
2025	123	18.4
2030	122	18.8
Percent change 2006-2030	5.1%	15.8%
Annualized change 2006-2030	0.21%	0.61%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	63	8.9
2015	60	8.6
2020	56	8.3
2025	53	7.9
2030	49	7.6
Percent change 2006-2030	-25.0%	-17.4%
Annualized change 2006-2030	-1.19%	-0.80%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	123	17.5
2015	121	17.4
2020	116	17.0
2025	111	16.6
2030	106	16.3
Percent change 2006-2030	-15.0%	-6.4%
Annualized change 2006-2030	-0.68%	-0.28%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	113	16.0
2015	114	16.3
2020	118	17.3
2025	120	18.0
2030	121	18.5
Percent change 2006-2030	10.6%	21.8%
Annualized change 2006-2030	0.42%	0.82%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	134	18.9
2015	140	20.2
2020	144	21.1
2025	147	22.0
2030	149	22.9
Percent change 2006-2030	19.0%	31.0%
Annualized change 2006-2030	0.73%	1.13%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	122	17.3
2015	138	19.9
2020	152	22.3
2025	165	24.6
2030	175	26.9
Percent change 2006-2030	57.2%	73.2%
Annualized change 2006-2030	1.90%	2.32%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	111	15.8
2015	117	16.8
2020	119	17.5
2025	122	18.3
2030	124	19.1
Percent change 2006-2030	17.3%	29.2%
Annualized change 2006-2030	0.67%	1.07%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.3
2015	56	8.1
2020	54	7.9
2025	51	7.6
2030	49	7.5
Percent change 2006-2030	-18.9%	-10.7%
Annualized change 2006-2030	-0.87%	-0.47%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	44	6.4
2020	43	6.4
2025	43	6.4
2030	41	6.4
Percent change 2006-2030	-6.0%	3.5%
Annualized change 2006-2030	-0.26%	0.14%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	90	12.7
2015	92	13.2
2020	94	13.7
2025	95	14.2
2030	96	14.8
Percent change 2006-2030	10.4%	21.6%
Annualized change 2006-2030	0.41%	0.82%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	33	4.7
2015	32	4.6
2020	30	4.4
2025	29	4.3
2030	28	4.2
Percent change 2006-2030	-18.8%	-10.5%
Annualized change 2006-2030	-0.86%	-0.46%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.4
2015	58	8.3
2020	57	8.3
2025	55	8.2
2030	52	8.0
Percent change 2006-2030	-13.1%	-4.3%
Annualized change 2006-2030	-0.59%	-0.18%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	210	29.7
2015	214	30.8
2020	214	31.4
2025	213	31.8
2030	211	32.4
Percent change 2006-2030	3.8%	14.3%
Annualized change 2006-2030	0.15%	0.56%

Central New York Supply Scenario 1: Baseline (Supply Responsive to Demand)

Figure 77 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,266	320.5
2015	2,272	326.4
2020	2,250	329.1
2025	2,200	329.2
2030	2,136	328.5
Percent change 2006-2030	-4.4%	5.3%
Annualized change 2006-2030	-0.19%	0.22%

Figure 78 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	676	95.6	2010	1,590	224.9
2015	674	96.8	2015	1,598	229.6
2020	661	96.7	2020	1,589	232.5
2025	637	95.3	2025	1,563	233.9
2030	607	93.4	2030	1,529	235.2
Percent change 2006-2030	-8.6%	0.7%	Percent change 2006-2030	-2.6%	7.3%
Annualized change 2006-2030	-0.37%	0.03%	Annualized change 2006-2030	-0.11%	0.29%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 79 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	676	95.6	2010	259	36.6
2015	674	96.8	2015	259	37.2
2020	661	96.7	2020	253	37.0
2025	637	95.3	2025	241	36.1
2030	607	93.4	2030	227	35.0
Percent change 2006-2030	-8.6%	0.7%	Percent change 2006-2030	-11.2%	-2.2%
Annualized change 2006-2030	-0.37%	0.03%	Annualized change 2006-2030	-0.50%	-0.09%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	257	36.3	2010	160	22.6
2015	254	36.4	2015	161	23.2
2020	246	36.0	2020	162	23.7
2025	236	35.3	2025	159	23.9
2030	224	34.4	2030	156	24.0
Percent change 2006-2030	-10.6%	-1.5%	Percent change 2006-2030	-1.1%	8.9%
Annualized change 2006-2030	-0.47%	-0.06%	Annualized change 2006-2030	-0.05%	0.36%

Non-Primary Care Specialties

Figure 80 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	71	9.9	2006	252	35.2
2010	73	10.3	2010	265	37.4
2015	76	10.9	2015	282	40.5
2020	78	11.4	2020	295	43.1
2025	79	11.8	2025	303	45.4
2030	80	12.4	2030	308	47.4
Percent change 2006-2030	13.2%	24.7%	Percent change 2006-2030	22.4%	34.8%
Annualized change 2006-2030	0.52%	0.92%	Annualized change 2006-2030	0.84%	1.25%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	116	16.2	2006	66	9.2
2010	117	16.5	2010	61	8.7
2015	116	16.7	2015	56	8.1
2020	113	16.5	2020	52	7.6
2025	109	16.3	2025	47	7.1
2030	104	16.0	2030	43	6.6
Percent change 2006-2030	-10.2%	-1.1%	Percent change 2006-2030	-35.1%	-28.6%
Annualized change 2006-2030	-0.45%	-0.04%	Annualized change 2006-2030	-1.79%	-1.39%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	109	15.2
2010	120	17.0	2010	111	15.6
2015	114	16.3	2015	108	15.6
2020	105	15.4	2020	109	15.9
2025	96	14.4	2025	108	16.2
2030	88	13.6	2030	105	16.2
Percent change 2006-2030	-29.3%	-22.1%	Percent change 2006-2030	-3.4%	6.4%
Annualized change 2006-2030	-1.43%	-1.04%	Annualized change 2006-2030	-0.14%	0.26%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	111	15.5
2010	131	18.5	2010	119	16.8
2015	133	19.1	2015	132	18.9
2020	133	19.5	2020	140	20.5
2025	132	19.7	2025	147	21.9
2030	130	19.9	2030	151	23.2
Percent change 2006-2030	3.6%	14.2%	Percent change 2006-2030	36.1%	49.9%
Annualized change 2006-2030	0.15%	0.55%	Annualized change 2006-2030	1.29%	1.70%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	110	15.5
2015	110	15.9
2020	110	16.1
2025	109	16.3
2030	107	16.5
Percent change 2006-2030	0.9%	11.1%
Annualized change 2006-2030	0.04%	0.44%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	57	8.1
2015	53	7.7
2020	50	7.3
2025	46	6.9
2030	42	6.5
Percent change 2006-2030	-29.7%	-22.5%
Annualized change 2006-2030	-1.45%	-1.06%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	43	6.1
2015	42	6.0
2020	40	5.8
2025	38	5.7
2030	36	5.5
Percent change 2006-2030	-19.3%	-11.1%
Annualized change 2006-2030	-0.89%	-0.49%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	88	12.5
2015	88	12.6
2020	87	12.7
2025	86	12.8
2030	84	13.0
Percent change 2006-2030	-3.0%	6.9%
Annualized change 2006-2030	-0.12%	0.28%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	32	4.6
2015	30	4.4
2020	28	4.1
2025	26	3.9
2030	24	3.7
Percent change 2006-2030	-29.7%	-22.6%
Annualized change 2006-2030	-1.46%	-1.06%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.2
2015	55	7.9
2020	52	7.7
2025	49	7.3
2030	45	6.9
Percent change 2006-2030	-25.3%	-17.8%
Annualized change 2006-2030	-1.21%	-0.81%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	205	29.0
2015	203	29.2
2020	197	28.8
2025	189	28.2
2030	181	27.8
Percent change 2006-2030	-10.9%	-1.8%
Annualized change 2006-2030	-0.48%	-0.08%

Central New York Supply Scenario 2a: NP/PA High Growth (Supply Not Responsive to Demand)

Figure 81 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,362	334.1
2015	2,493	358.2
2020	2,593	379.3
2025	2,665	398.9
2030	2,728	419.6
Percent change 2006-2030	22.2%	34.6%
Annualized change 2006-2030	0.84%	1.24%

Figure 82 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	713	100.8	2010	1,649	233.3
2015	753	108.1	2015	1,741	250.0
2020	781	114.2	2020	1,812	265.1
2025	799	119.6	2025	1,866	279.3
2030	812	124.9	2030	1,916	294.7
Percent change 2006-2030	22.3%	34.7%	Percent change 2006-2030	22.1%	34.5%
Annualized change 2006-2030	0.84%	1.25%	Annualized change 2006-2030	0.84%	1.24%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 83 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	713	100.8	2010	272	38.5
2015	753	108.1	2015	287	41.2
2020	781	114.2	2020	296	43.3
2025	799	119.6	2025	299	44.7
2030	812	124.9	2030	298	45.8
Percent change 2006-2030	22.3%	34.7%	Percent change 2006-2030	16.4%	28.2%
Annualized change 2006-2030	0.84%	1.25%	Annualized change 2006-2030	0.63%	1.04%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	271	38.4	2010	170	24.0
2015	285	41.0	2015	180	25.9
2020	295	43.2	2020	190	27.8
2025	302	45.2	2025	198	29.7
2030	306	47.1	2030	208	32.0
Percent change 2006-2030	22.5%	34.9%	Percent change 2006-2030	31.5%	44.8%
Annualized change 2006-2030	0.85%	1.26%	Annualized change 2006-2030	1.15%	1.56%

Non-Primary Care Specialties

Figure 84 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	71	9.9	2006	252	35.2
2010	75	10.7	2010	274	38.8
2015	83	11.9	2015	308	44.2
2020	89	13.1	2020	338	49.5
2025	95	14.2	2025	365	54.6
2030	100	15.4	2030	390	60.0
Percent change 2006-2030	41.2%	55.6%	Percent change 2006-2030	54.9%	70.6%
Annualized change 2006-2030	1.45%	1.86%	Annualized change 2006-2030	1.84%	2.25%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	116	16.2	2006	66	9.2
2010	121	17.1	2010	64	9.0
2015	126	18.1	2015	62	8.8
2020	129	18.9	2020	59	8.6
2025	131	19.5	2025	56	8.4
2030	131	20.2	2030	53	8.2
Percent change 2006-2030	13.3%	24.8%	Percent change 2006-2030	-19.2%	-11.0%
Annualized change 2006-2030	0.52%	0.93%	Annualized change 2006-2030	-0.88%	-0.48%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	109	15.2
2010	125	17.7	2010	115	16.2
2015	125	18.0	2015	117	16.8
2020	122	17.8	2020	123	18.1
2025	118	17.6	2025	128	19.1
2030	114	17.6	2030	130	20.0
Percent change 2006-2030	-8.4%	0.9%	Percent change 2006-2030	19.2%	31.3%
Annualized change 2006-2030	-0.37%	0.04%	Annualized change 2006-2030	0.73%	1.14%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	111	15.5
2010	136	19.2	2010	124	17.5
2015	145	20.8	2015	142	20.5
2020	151	22.1	2020	159	23.3
2025	156	23.3	2025	175	26.2
2030	160	24.7	2030	188	29.0
Percent change 2006-2030	28.3%	41.3%	Percent change 2006-2030	69.5%	86.8%
Annualized change 2006-2030	1.04%	1.45%	Annualized change 2006-2030	2.22%	2.64%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	113	16.0
2015	120	17.3
2020	125	18.3
2025	130	19.4
2030	134	20.6
Percent change 2006-2030	26.4%	39.3%
Annualized change 2006-2030	0.98%	1.39%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.4
2015	58	8.3
2020	56	8.3
2025	54	8.1
2030	52	8.1
Percent change 2006-2030	-12.6%	-3.7%
Annualized change 2006-2030	-0.56%	-0.16%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	45	6.3
2015	46	6.6
2020	45	6.7
2025	45	6.8
2030	45	6.9
Percent change 2006-2030	1.3%	11.6%
Annualized change 2006-2030	0.05%	0.46%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	91	12.9
2015	95	13.7
2020	98	14.4
2025	101	15.1
2030	104	15.9
Percent change 2006-2030	19.0%	31.1%
Annualized change 2006-2030	0.73%	1.13%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	34	4.7
2015	33	4.7
2020	32	4.6
2025	31	4.6
2030	30	4.6
Percent change 2006-2030	-12.4%	-3.5%
Annualized change 2006-2030	-0.55%	-0.15%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	60	8.5
2015	60	8.6
2020	59	8.7
2025	58	8.7
2030	56	8.6
Percent change 2006-2030	-6.3%	3.2%
Annualized change 2006-2030	-0.27%	0.13%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	213	30.1
2015	221	31.7
2020	224	32.8
2025	226	33.8
2030	227	34.9
Percent change 2006-2030	11.9%	23.2%
Annualized change 2006-2030	0.47%	0.87%

Central New York Supply Scenario 2a: NP/PA High Growth (Supply Responsive to Demand)

Figure 85 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,310	326.7
2015	2,368	340.2
2020	2,394	350.3
2025	2,389	357.5
2030	2,368	364.3
Percent change 2006-2030	6.1%	16.8%
Annualized change 2006-2030	0.25%	0.65%

Figure 86 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	695	98.4	2010	1,615	228.4
2015	716	102.9	2015	1,652	237.3
2020	724	105.9	2020	1,670	244.3
2025	719	107.6	2025	1,669	249.8
2030	708	109.0	2030	1,660	255.3
Percent change 2006-2030	6.7%	17.5%	Percent change 2006-2030	5.8%	16.5%
Annualized change 2006-2030	0.27%	0.68%	Annualized change 2006-2030	0.23%	0.64%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 87 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	695	98.4	2010	267	37.7
2015	716	102.9	2015	275	39.6
2020	724	105.9	2020	277	40.5
2025	719	107.6	2025	273	40.8
2030	708	109.0	2030	265	40.8
Percent change 2006-2030	6.7%	17.5%	Percent change 2006-2030	3.6%	14.1%
Annualized change 2006-2030	0.27%	0.68%	Annualized change 2006-2030	0.15%	0.55%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	264	37.4	2010	165	23.3
2015	269	38.7	2015	171	24.6
2020	269	39.4	2020	178	26.0
2025	266	39.8	2025	180	26.9
2030	261	40.1	2030	182	28.0
Percent change 2006-2030	4.4%	15.0%	Percent change 2006-2030	15.4%	27.1%
Annualized change 2006-2030	0.18%	0.58%	Annualized change 2006-2030	0.60%	1.00%

Non-Primary Care Specialties

Figure 88 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	74	10.5
2015	78	11.2
2020	82	12.0
2025	84	12.6
2030	87	13.4
Percent change 2006-2030	22.9%	35.4%
Annualized change 2006-2030	0.86%	1.27%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	269	38.0
2015	291	41.9
2020	310	45.3
2025	324	48.4
2030	335	51.5
Percent change 2006-2030	32.9%	46.4%
Annualized change 2006-2030	1.19%	1.60%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	118	16.7
2015	120	17.2
2020	118	17.3
2025	117	17.5
2030	113	17.4
Percent change 2006-2030	-2.5%	7.4%
Annualized change 2006-2030	-0.10%	0.30%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	62	8.8
2015	58	8.4
2020	54	8.0
2025	51	7.6
2030	46	7.2
Percent change 2006-2030	-29.6%	-22.4%
Annualized change 2006-2030	-1.45%	-1.05%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	122	17.2
2015	118	16.9
2020	110	16.2
2025	103	15.3
2030	96	14.8
Percent change 2006-2030	-23.2%	-15.5%
Annualized change 2006-2030	-1.10%	-0.70%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	112	15.9
2015	112	16.1
2020	114	16.7
2025	115	17.3
2030	114	17.6
Percent change 2006-2030	4.9%	15.5%
Annualized change 2006-2030	0.20%	0.60%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	133	18.8
2015	137	19.8
2020	140	20.5
2025	141	21.1
2030	141	21.6
Percent change 2006-2030	12.5%	24.0%
Annualized change 2006-2030	0.49%	0.90%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	121	17.1
2015	136	19.5
2020	147	21.6
2025	157	23.4
2030	164	25.2
Percent change 2006-2030	47.7%	62.7%
Annualized change 2006-2030	1.64%	2.05%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	111	15.7
2015	114	16.4
2020	116	16.9
2025	116	17.4
2030	116	17.9
Percent change 2006-2030	9.5%	20.7%
Annualized change 2006-2030	0.38%	0.79%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.2
2015	55	7.9
2020	53	7.7
2025	49	7.3
2030	46	7.1
Percent change 2006-2030	-23.6%	-15.9%
Annualized change 2006-2030	-1.12%	-0.72%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	43	6.2
2020	42	6.1
2025	41	6.1
2030	39	5.9
Percent change 2006-2030	-12.3%	-3.4%
Annualized change 2006-2030	-0.55%	-0.15%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	90	12.7
2015	91	13.0
2020	91	13.4
2025	92	13.7
2030	92	14.1
Percent change 2006-2030	5.4%	16.1%
Annualized change 2006-2030	0.22%	0.62%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	33	4.6
2015	31	4.5
2020	30	4.3
2025	28	4.1
2030	26	4.0
Percent change 2006-2030	-23.7%	-16.0%
Annualized change 2006-2030	-1.12%	-0.72%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.3
2015	57	8.2
2020	55	8.1
2025	52	7.8
2030	49	7.5
Percent change 2006-2030	-18.9%	-10.7%
Annualized change 2006-2030	-0.87%	-0.47%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	208	29.5
2015	210	30.1
2020	207	30.2
2025	202	30.2
2030	196	30.2
Percent change 2006-2030	-3.2%	6.6%
Annualized change 2006-2030	-0.14%	0.27%

Central New York Supply Scenario 2b: NP/PA Lower Growth (Supply Not Responsive to Demand)

Figure 89 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,349	332.3
2015	2,449	351.8
2020	2,516	368.2
2025	2,557	382.7
2030	2,588	398.1
Percent change 2006-2030	15.9%	27.7%
Annualized change 2006-2030	0.62%	1.02%

Figure 90 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	707	100.1	2010	1,642	232.2
2015	734	105.4	2015	1,715	246.4
2020	748	109.4	2020	1,768	258.7
2025	753	112.6	2025	1,805	270.1
2030	752	115.7	2030	1,836	282.5
Percent change 2006-2030	13.2%	24.7%	Percent change 2006-2030	17.0%	28.9%
Annualized change 2006-2030	0.52%	0.92%	Annualized change 2006-2030	0.66%	1.06%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 91 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	707	100.1	2010	270	38.2
2015	734	105.4	2015	280	40.2
2020	748	109.4	2020	283	41.4
2025	753	112.6	2025	281	42.1
2030	752	115.7	2030	276	42.4
Percent change 2006-2030	13.2%	24.7%	Percent change 2006-2030	7.8%	18.7%
Annualized change 2006-2030	0.52%	0.92%	Annualized change 2006-2030	0.31%	0.72%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	269	38.1	2010	168	23.8
2015	278	40.0	2015	176	25.2
2020	283	41.4	2020	182	26.6
2025	284	42.5	2025	187	28.0
2030	284	43.6	2030	192	29.6
Percent change 2006-2030	13.4%	24.9%	Percent change 2006-2030	21.8%	34.1%
Annualized change 2006-2030	0.53%	0.93%	Annualized change 2006-2030	0.82%	1.23%

Non-Primary Care Specialties

Figure 92 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	75	10.6
2015	82	11.7
2020	87	12.8
2025	92	13.7
2030	96	14.8
Percent change 2006-2030	35.4%	49.1%
Annualized change 2006-2030	1.27%	1.68%

Obstetrics and Gynecology

Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	121	17.1
2015	124	17.9
2020	126	18.5
2025	126	18.9
2030	126	19.4
Percent change 2006-2030	8.6%	19.6%
Annualized change 2006-2030	0.34%	0.75%

Psychiatry

Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	125	17.6
2015	123	17.7
2020	119	17.4
2025	114	17.0
2030	110	16.9
Percent change 2006-2030	-12.2%	-3.3%
Annualized change 2006-2030	-0.54%	-0.14%

Radiology

Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	135	19.1
2015	143	20.5
2020	147	21.5
2025	151	22.5
2030	154	23.6
Percent change 2006-2030	22.9%	35.4%
Annualized change 2006-2030	0.86%	1.27%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	112	15.9
2015	119	17.0
2020	122	17.9
2025	125	18.8
2030	128	19.8
Percent change 2006-2030	21.2%	33.5%
Annualized change 2006-2030	0.80%	1.21%

Other Internal Medicine Subspecialties

Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	273	38.6
2015	303	43.6
2020	330	48.3
2025	353	52.8
2030	374	57.5
Percent change 2006-2030	48.4%	63.5%
Annualized change 2006-2030	1.66%	2.07%

Pathology

Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	64	9.0
2015	61	8.7
2020	58	8.4
2025	54	8.1
2030	51	7.9
Percent change 2006-2030	-22.5%	-14.7%
Annualized change 2006-2030	-1.06%	-0.66%

Anesthesiology

Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	114	16.1
2015	116	16.6
2020	120	17.6
2025	123	18.5
2030	125	19.2
Percent change 2006-2030	14.3%	25.9%
Annualized change 2006-2030	0.56%	0.96%

Emergency Medicine

Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	123	17.5
2015	140	20.2
2020	156	22.8
2025	169	25.3
2030	180	27.7
Percent change 2006-2030	62.5%	79.0%
Annualized change 2006-2030	2.04%	2.46%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.4
2015	57	8.2
2020	55	8.1
2025	52	7.8
2030	50	7.7
Percent change 2006-2030	-16.2%	-7.7%
Annualized change 2006-2030	-0.73%	-0.33%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	45	6.3
2015	45	6.5
2020	44	6.5
2025	44	6.6
2030	43	6.6
Percent change 2006-2030	-2.9%	7.0%
Annualized change 2006-2030	-0.12%	0.28%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	91	12.9
2015	94	13.5
2020	96	14.0
2025	97	14.6
2030	99	15.3
Percent change 2006-2030	14.1%	25.7%
Annualized change 2006-2030	0.55%	0.96%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	33	4.7
2015	32	4.6
2020	31	4.5
2025	30	4.4
2030	29	4.4
Percent change 2006-2030	-16.0%	-7.5%
Annualized change 2006-2030	-0.73%	-0.33%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	60	8.5
2015	59	8.5
2020	58	8.5
2025	56	8.4
2030	54	8.3
Percent change 2006-2030	-10.2%	-1.1%
Annualized change 2006-2030	-0.45%	-0.05%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	212	30.0
2015	218	31.3
2020	219	32.0
2025	218	32.7
2030	218	33.5
Percent change 2006-2030	7.2%	18.1%
Annualized change 2006-2030	0.29%	0.70%

Central New York Supply Scenario 2b: NP/PA Lower Growth (Supply Responsive to Demand)

Figure 93 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,298	325.0
2015	2,326	334.1
2020	2,324	340.0
2025	2,292	343.0
2030	2,247	345.7
Percent change 2006-2030	0.6%	10.8%
Annualized change 2006-2030	0.03%	0.43%

Figure 94 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	690	97.6	2010	1,607	227.4
2015	698	100.3	2015	1,628	233.9
2020	693	101.5	2020	1,630	238.5
2025	677	101.4	2025	1,614	241.6
2030	656	100.9	2030	1,591	244.8
Percent change 2006-2030	-1.2%	8.8%	Percent change 2006-2030	1.4%	11.7%
Annualized change 2006-2030	-0.05%	0.35%	Annualized change 2006-2030	0.06%	0.46%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 95 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	690	97.6	2010	265	37.4
2015	698	100.3	2015	268	38.6
2020	693	101.5	2020	265	38.8
2025	677	101.4	2025	257	38.5
2030	656	100.9	2030	246	37.8
Percent change 2006-2030	-1.2%	8.8%	Percent change 2006-2030	-4.1%	5.7%
Annualized change 2006-2030	-0.05%	0.35%	Annualized change 2006-2030	-0.17%	0.23%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	262	37.1	2010	163	23.1
2015	263	37.7	2015	167	24.0
2020	258	37.8	2020	170	24.9
2025	251	37.5	2025	170	25.4
2030	242	37.2	2030	169	26.0
Percent change 2006-2030	-3.4%	6.4%	Percent change 2006-2030	6.9%	17.7%
Annualized change 2006-2030	-0.14%	0.26%	Annualized change 2006-2030	0.28%	0.68%

Non-Primary Care Specialties

Figure 96 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	71	9.9	2006	252	35.2
2010	74	10.4	2010	268	37.8
2015	77	11.1	2015	287	41.3
2020	80	11.7	2020	302	44.3
2025	82	12.2	2025	313	46.9
2030	84	12.9	2030	321	49.4
Percent change 2006-2030	17.8%	29.8%	Percent change 2006-2030	27.4%	40.3%
Annualized change 2006-2030	0.69%	1.09%	Annualized change 2006-2030	1.01%	1.42%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	116	16.2	2006	66	9.2
2010	118	16.7	2010	62	8.8
2015	118	17.0	2015	57	8.3
2020	116	16.9	2020	53	7.8
2025	113	16.9	2025	49	7.3
2030	108	16.7	2030	45	6.9
Percent change 2006-2030	-6.5%	3.0%	Percent change 2006-2030	-32.5%	-25.6%
Annualized change 2006-2030	-0.28%	0.12%	Annualized change 2006-2030	-1.62%	-1.23%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	109	15.2
2010	121	17.2	2010	112	15.8
2015	116	16.6	2015	110	15.9
2020	108	15.8	2020	112	16.3
2025	99	14.8	2025	112	16.7
2030	92	14.1	2030	110	16.9
Percent change 2006-2030	-26.4%	-19.0%	Percent change 2006-2030	0.5%	10.7%
Annualized change 2006-2030	-1.27%	-0.87%	Annualized change 2006-2030	0.02%	0.43%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	111	15.5
2010	133	18.7	2010	120	17.0
2015	135	19.5	2015	134	19.2
2020	137	20.0	2020	144	21.0
2025	136	20.4	2025	151	22.7
2030	135	20.7	2030	157	24.2
Percent change 2006-2030	7.9%	18.8%	Percent change 2006-2030	41.6%	56.0%
Annualized change 2006-2030	0.32%	0.72%	Annualized change 2006-2030	1.46%	1.87%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	111	15.7
2015	113	16.2
2020	113	16.5
2025	112	16.8
2030	111	17.1
Percent change 2006-2030	5.0%	15.7%
Annualized change 2006-2030	0.20%	0.61%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.1
2015	54	7.8
2020	51	7.5
2025	47	7.1
2030	44	6.8
Percent change 2006-2030	-26.8%	-19.4%
Annualized change 2006-2030	-1.29%	-0.89%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	43	6.1
2020	41	6.0
2025	40	5.9
2030	37	5.7
Percent change 2006-2030	-16.0%	-7.4%
Annualized change 2006-2030	-0.72%	-0.32%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	89	12.6
2015	89	12.8
2020	89	13.1
2025	89	13.3
2030	88	13.5
Percent change 2006-2030	1.0%	11.3%
Annualized change 2006-2030	0.04%	0.45%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	33	4.6
2015	31	4.4
2020	29	4.2
2025	27	4.0
2030	25	3.8
Percent change 2006-2030	-26.9%	-19.4%
Annualized change 2006-2030	-1.30%	-0.90%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.3
2015	56	8.1
2020	54	7.9
2025	50	7.5
2030	47	7.2
Percent change 2006-2030	-22.3%	-14.4%
Annualized change 2006-2030	-1.05%	-0.65%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	207	29.3
2015	207	29.7
2020	202	29.5
2025	195	29.2
2030	188	29.0
Percent change 2006-2030	-7.3%	2.2%
Annualized change 2006-2030	-0.31%	0.09%

Central New York Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 97 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,319	328.0
2015	2,412	346.5
2020	2,473	361.9
2025	2,508	375.4
2030	2,525	388.5
Percent change 2006-2030	13.1%	24.6%
Annualized change 2006-2030	0.51%	0.92%

Figure 98 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	691	97.7	2010	1,628	230.3
2015	712	102.2	2015	1,700	244.2
2020	721	105.4	2020	1,753	256.4
2025	719	107.6	2025	1,790	267.8
2030	709	109.1	2030	1,816	279.4
Percent change 2006-2030	6.8%	17.6%	Percent change 2006-2030	15.8%	27.5%
Annualized change 2006-2030	0.27%	0.68%	Annualized change 2006-2030	0.61%	1.02%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 99– Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	691	97.7	2010	263	37.3
2015	712	102.2	2015	271	39.0
2020	721	105.4	2020	273	39.9
2025	719	107.6	2025	269	40.2
2030	709	109.1	2030	260	40.0
Percent change 2006-2030	6.8%	17.6%	Percent change 2006-2030	1.6%	12.0%
Annualized change 2006-2030	0.27%	0.68%	Annualized change 2006-2030	0.07%	0.47%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	263	37.2	2010	164	23.3
2015	270	38.8	2015	170	24.5
2020	273	39.9	2020	175	25.6
2025	271	40.6	2025	179	26.7
2030	267	41.1	2030	181	27.9
Percent change 2006-2030	7.0%	17.8%	Percent change 2006-2030	14.8%	26.5%
Annualized change 2006-2030	0.28%	0.69%	Annualized change 2006-2030	0.58%	0.98%

Non-Primary Care Specialties

Figure 100 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	71	9.9	2006	252	35.2
2010	74	10.5	2010	271	38.3
2015	81	11.6	2015	301	43.2
2020	86	12.6	2020	327	47.9
2025	91	13.6	2025	350	52.3
2030	95	14.6	2030	370	56.9
Percent change 2006-2030	33.9%	47.5%	Percent change 2006-2030	46.8%	61.7%
Annualized change 2006-2030	1.22%	1.63%	Annualized change 2006-2030	1.61%	2.02%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	116	16.2	2006	66	9.2
2010	120	16.9	2010	63	8.9
2015	123	17.7	2015	60	8.6
2020	125	18.3	2020	57	8.4
2025	125	18.7	2025	54	8.1
2030	125	19.2	2030	51	7.8
Percent change 2006-2030	7.4%	18.3%	Percent change 2006-2030	-23.4%	-15.6%
Annualized change 2006-2030	0.30%	0.70%	Annualized change 2006-2030	-1.10%	-0.70%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	109	15.2
2010	124	17.5	2010	113	16.0
2015	122	17.5	2015	115	16.5
2020	118	17.2	2020	119	17.5
2025	113	16.9	2025	122	18.3
2030	109	16.7	2030	123	19.0
Percent change 2006-2030	-13.2%	-4.3%	Percent change 2006-2030	13.0%	24.5%
Annualized change 2006-2030	-0.59%	-0.18%	Annualized change 2006-2030	0.51%	0.92%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	111	15.5
2010	134	18.9	2010	122	17.3
2015	141	20.3	2015	139	20.0
2020	146	21.4	2020	154	22.6
2025	149	22.4	2025	168	25.1
2030	152	23.4	2030	178	27.4
Percent change 2006-2030	21.6%	33.9%	Percent change 2006-2030	60.7%	77.1%
Annualized change 2006-2030	0.82%	1.23%	Annualized change 2006-2030	2.00%	2.41%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	112	15.8
2015	118	16.9
2020	121	17.7
2025	124	18.6
2030	127	19.5
Percent change 2006-2030	19.9%	32.0%
Annualized change 2006-2030	0.76%	1.16%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.3
2015	57	8.1
2020	55	8.0
2025	52	7.8
2030	50	7.7
Percent change 2006-2030	-17.1%	-8.7%
Annualized change 2006-2030	-0.78%	-0.38%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	45	6.4
2020	44	6.4
2025	44	6.5
2030	42	6.5
Percent change 2006-2030	-3.9%	5.8%
Annualized change 2006-2030	-0.17%	0.24%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	90	12.8
2015	93	13.3
2020	95	13.9
2025	97	14.5
2030	98	15.1
Percent change 2006-2030	12.8%	24.3%
Annualized change 2006-2030	0.50%	0.91%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	33	4.7
2015	32	4.6
2020	31	4.5
2025	29	4.4
2030	28	4.3
Percent change 2006-2030	-17.0%	-8.5%
Annualized change 2006-2030	-0.77%	-0.37%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.4
2015	58	8.4
2020	57	8.4
2025	56	8.3
2030	53	8.2
Percent change 2006-2030	-11.2%	-2.2%
Annualized change 2006-2030	-0.49%	-0.09%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	210	29.7
2015	216	31.0
2020	217	31.8
2025	216	32.4
2030	215	33.1
Percent change 2006-2030	6.1%	16.8%
Annualized change 2006-2030	0.25%	0.65%

Central New York Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 101 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,268	320.8
2015	2,288	328.6
2020	2,278	333.3
2025	2,241	335.3
2030	2,187	336.5
Percent change 2006-2030	-2.1%	7.9%
Annualized change 2006-2030	-0.09%	0.32%

Figure 102 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	677	95.7	2010	1,591	225.1
2015	679	97.6	2015	1,608	231.0
2020	670	98.0	2020	1,608	235.3
2025	650	97.3	2025	1,591	238.0
2030	624	96.0	2030	1,563	240.5
Percent change 2006-2030	-6.0%	3.5%	Percent change 2006-2030	-0.4%	9.7%
Annualized change 2006-2030	-0.26%	0.14%	Annualized change 2006-2030	-0.02%	0.39%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 103– Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	677	95.7	2010	259	36.7
2015	679	97.6	2015	261	37.5
2020	670	98.0	2020	256	37.5
2025	650	97.3	2025	247	36.9
2030	624	96.0	2030	234	35.9
Percent change 2006-2030	-6.0%	3.5%	Percent change 2006-2030	-8.7%	0.5%
Annualized change 2006-2030	-0.26%	0.14%	Annualized change 2006-2030	-0.38%	0.02%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	257	36.4	2010	160	22.7
2015	255	36.7	2015	163	23.3
2020	249	36.5	2020	164	24.0
2025	241	36.0	2025	163	24.4
2030	230	35.4	2030	161	24.7
Percent change 2006-2030	-8.1%	1.3%	Percent change 2006-2030	1.6%	12.0%
Annualized change 2006-2030	-0.35%	0.05%	Annualized change 2006-2030	0.07%	0.47%

Non-Primary Care Specialties

Figure 104 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	73	10.3
2015	76	10.9
2020	79	11.6
2025	80	12.0
2030	82	12.6
Percent change 2006-2030	15.8%	27.5%
Annualized change 2006-2030	0.61%	1.02%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	265	37.5
2015	284	40.8
2020	298	43.7
2025	308	46.2
2030	315	48.5
Percent change 2006-2030	25.1%	37.8%
Annualized change 2006-2030	0.94%	1.35%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	117	16.5
2015	117	16.8
2020	114	16.7
2025	111	16.6
2030	107	16.4
Percent change 2006-2030	-8.2%	1.2%
Annualized change 2006-2030	-0.35%	0.05%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	62	8.7
2015	57	8.2
2020	52	7.7
2025	48	7.2
2030	44	6.7
Percent change 2006-2030	-33.7%	-27.0%
Annualized change 2006-2030	-1.70%	-1.30%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	120	17.0
2015	114	16.4
2020	106	15.6
2025	98	14.6
2030	90	13.9
Percent change 2006-2030	-27.7%	-20.4%
Annualized change 2006-2030	-1.34%	-0.95%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	111	15.7
2015	109	15.7
2020	110	16.1
2025	110	16.5
2030	108	16.6
Percent change 2006-2030	-1.2%	8.8%
Annualized change 2006-2030	-0.05%	0.35%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	131	18.6
2015	134	19.2
2020	135	19.7
2025	134	20.1
2030	132	20.4
Percent change 2006-2030	6.0%	16.7%
Annualized change 2006-2030	0.24%	0.65%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	119	16.8
2015	132	19.0
2020	142	20.8
2025	149	22.3
2030	154	23.8
Percent change 2006-2030	39.1%	53.3%
Annualized change 2006-2030	1.39%	1.79%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	110	15.5
2015	111	16.0
2020	111	16.3
2025	111	16.5
2030	109	16.8
Percent change 2006-2030	3.2%	13.6%
Annualized change 2006-2030	0.13%	0.53%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	57	8.1
2015	54	7.7
2020	51	7.4
2025	47	7.0
2030	43	6.6
Percent change 2006-2030	-28.1%	-20.8%
Annualized change 2006-2030	-1.36%	-0.97%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	43	6.2
2015	42	6.0
2020	40	5.9
2025	39	5.8
2030	36	5.6
Percent change 2006-2030	-17.5%	-9.1%
Annualized change 2006-2030	-0.80%	-0.40%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	88	12.5
2015	88	12.7
2020	88	12.9
2025	87	13.1
2030	86	13.3
Percent change 2006-2030	-0.8%	9.3%
Annualized change 2006-2030	-0.03%	0.37%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	32	4.6
2015	30	4.4
2020	29	4.2
2025	26	3.9
2030	24	3.8
Percent change 2006-2030	-28.2%	-20.9%
Annualized change 2006-2030	-1.37%	-0.97%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.2
2015	55	8.0
2020	53	7.8
2025	50	7.4
2030	46	7.0
Percent change 2006-2030	-23.7%	-15.9%
Annualized change 2006-2030	-1.12%	-0.72%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	205	29.1
2015	204	29.3
2020	199	29.1
2025	192	28.7
2030	185	28.5
Percent change 2006-2030	-8.9%	0.4%
Annualized change 2006-2030	-0.39%	0.02%

Central New York Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 105 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,319	328.0
2015	2,412	346.5
2020	2,473	361.9
2025	2,508	375.4
2030	2,525	388.5
Percent change 2006-2030	13.1%	24.6%
Annualized change 2006-2030	0.51%	0.92%

Figure 106 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	691	97.7	2010	1,628	230.3
2015	710	102.0	2015	1,702	244.4
2020	718	105.0	2020	1,756	256.8
2025	715	107.0	2025	1,793	268.4
2030	704	108.3	2030	1,821	280.2
Percent change 2006-2030	6.0%	16.8%	Percent change 2006-2030	16.1%	27.9%
Annualized change 2006-2030	0.24%	0.65%	Annualized change 2006-2030	0.62%	1.03%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 107– Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	691	97.7	2010	263	37.3
2015	710	102.0	2015	271	38.9
2020	718	105.0	2020	272	39.8
2025	715	107.0	2025	267	40.0
2030	704	108.3	2030	258	39.8
Percent change 2006-2030	6.0%	16.8%	Percent change 2006-2030	0.9%	11.2%
Annualized change 2006-2030	0.24%	0.65%	Annualized change 2006-2030	0.04%	0.44%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	263	37.2	2010	164	23.2
2015	269	38.7	2015	170	24.4
2020	272	39.7	2020	174	25.5
2025	270	40.4	2025	178	26.6
2030	266	40.9	2030	180	27.7
Percent change 2006-2030	6.2%	17.0%	Percent change 2006-2030	14.0%	25.6%
Annualized change 2006-2030	0.25%	0.66%	Annualized change 2006-2030	0.55%	0.95%

Non-Primary Care Specialties

Figure 108 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	71	9.9	2006	252	35.2
2010	74	10.5	2010	271	38.3
2015	81	11.6	2015	301	43.2
2020	87	12.7	2020	328	48.0
2025	91	13.6	2025	350	52.4
2030	95	14.7	2030	371	57.1
Percent change 2006-2030	34.3%	47.9%	Percent change 2006-2030	47.2%	62.2%
Annualized change 2006-2030	1.24%	1.64%	Annualized change 2006-2030	1.62%	2.03%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	116	16.2	2006	66	9.2
2010	120	16.9	2010	63	8.9
2015	123	17.7	2015	60	8.6
2020	125	18.3	2020	57	8.4
2025	126	18.8	2025	54	8.1
2030	125	19.2	2030	51	7.8
Percent change 2006-2030	7.7%	18.7%	Percent change 2006-2030	-23.2%	-15.4%
Annualized change 2006-2030	0.31%	0.72%	Annualized change 2006-2030	-1.09%	-0.69%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	109	15.2
2010	124	17.5	2010	113	16.0
2015	122	17.6	2015	115	16.5
2020	118	17.3	2020	120	17.5
2025	113	16.9	2025	123	18.3
2030	109	16.7	2030	124	19.0
Percent change 2006-2030	-12.9%	-4.1%	Percent change 2006-2030	13.3%	24.8%
Annualized change 2006-2030	-0.57%	-0.17%	Annualized change 2006-2030	0.52%	0.93%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	111	15.5
2010	134	18.9	2010	122	17.3
2015	141	20.3	2015	139	20.0
2020	146	21.4	2020	155	22.6
2025	150	22.4	2025	168	25.1
2030	152	23.4	2030	179	27.5
Percent change 2006-2030	21.9%	34.3%	Percent change 2006-2030	61.2%	77.5%
Annualized change 2006-2030	0.83%	1.24%	Annualized change 2006-2030	2.01%	2.42%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	112	15.8
2015	118	16.9
2020	121	17.7
2025	125	18.7
2030	127	19.6
Percent change 2006-2030	20.2%	32.4%
Annualized change 2006-2030	0.77%	1.18%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.3
2015	57	8.1
2020	55	8.0
2025	52	7.8
2030	50	7.7
Percent change 2006-2030	-16.9%	-8.5%
Annualized change 2006-2030	-0.77%	-0.37%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	45	6.4
2020	44	6.4
2025	44	6.5
2030	42	6.5
Percent change 2006-2030	-3.7%	6.1%
Annualized change 2006-2030	-0.16%	0.25%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	90	12.8
2015	93	13.3
2020	95	13.9
2025	97	14.5
2030	98	15.1
Percent change 2006-2030	13.1%	24.6%
Annualized change 2006-2030	0.52%	0.92%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	33	4.7
2015	32	4.6
2020	31	4.5
2025	29	4.4
2030	28	4.4
Percent change 2006-2030	-16.7%	-8.3%
Annualized change 2006-2030	-0.76%	-0.36%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	60	8.4
2015	59	8.4
2020	57	8.4
2025	56	8.3
2030	53	8.2
Percent change 2006-2030	-11.0%	-1.9%
Annualized change 2006-2030	-0.48%	-0.08%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	210	29.7
2015	216	31.0
2020	217	31.8
2025	217	32.4
2030	216	33.2
Percent change 2006-2030	6.3%	17.1%
Annualized change 2006-2030	0.26%	0.66%

Central New York Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 109 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,268	320.8
2015	2,288	328.6
2020	2,278	333.3
2025	2,241	335.3
2030	2,187	336.5
Percent change 2006-2030	-2.1%	7.9%
Annualized change 2006-2030	-0.09%	0.32%

Figure 110 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	677	95.7	2010	1,592	225.1
2015	678	97.4	2015	1,610	231.2
2020	668	97.7	2020	1,610	235.6
2025	647	96.8	2025	1,594	238.5
2030	620	95.3	2030	1,567	241.1
Percent change 2006-2030	-6.7%	2.8%	Percent change 2006-2030	-0.1%	10.0%
Annualized change 2006-2030	-0.29%	0.12%	Annualized change 2006-2030	0.00%	0.40%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 111– Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	677	95.7	2010	259	36.7
2015	678	97.4	2015	261	37.4
2020	668	97.7	2020	255	37.4
2025	647	96.8	2025	245	36.7
2030	620	95.3	2030	232	35.7
Percent change 2006-2030	-6.7%	2.8%	Percent change 2006-2030	-9.4%	-0.2%
Annualized change 2006-2030	-0.29%	0.12%	Annualized change 2006-2030	-0.41%	-0.01%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	257	36.4	2010	160	22.7
2015	255	36.6	2015	162	23.3
2020	249	36.4	2020	164	24.0
2025	239	35.8	2025	162	24.2
2030	228	35.1	2030	160	24.5
Percent change 2006-2030	-8.7%	0.6%	Percent change 2006-2030	1.0%	11.2%
Annualized change 2006-2030	-0.38%	0.02%	Annualized change 2006-2030	0.04%	0.44%

Non-Primary Care Specialties

Figure 112 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	73	10.3
2015	76	11.0
2020	79	11.6
2025	81	12.1
2030	82	12.7
Percent change 2006-2030	16.1%	27.9%
Annualized change 2006-2030	0.62%	1.03%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	265	37.5
2015	284	40.8
2020	299	43.7
2025	309	46.3
2030	316	48.6
Percent change 2006-2030	25.5%	38.2%
Annualized change 2006-2030	0.95%	1.36%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	117	16.5
2015	117	16.8
2020	114	16.7
2025	111	16.7
2030	107	16.4
Percent change 2006-2030	-7.9%	1.4%
Annualized change 2006-2030	-0.34%	0.06%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	62	8.7
2015	57	8.2
2020	53	7.7
2025	48	7.2
2030	44	6.8
Percent change 2006-2030	-33.5%	-26.8%
Annualized change 2006-2030	-1.69%	-1.29%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	120	17.0
2015	114	16.4
2020	107	15.6
2025	98	14.7
2030	91	13.9
Percent change 2006-2030	-27.5%	-20.2%
Annualized change 2006-2030	-1.33%	-0.93%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	111	15.7
2015	109	15.7
2020	110	16.1
2025	110	16.5
2030	108	16.6
Percent change 2006-2030	-1.0%	9.1%
Annualized change 2006-2030	-0.04%	0.36%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	131	18.6
2015	134	19.2
2020	135	19.8
2025	135	20.1
2030	133	20.4
Percent change 2006-2030	6.3%	17.0%
Annualized change 2006-2030	0.25%	0.66%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	119	16.9
2015	132	19.0
2020	142	20.8
2025	149	22.4
2030	155	23.8
Percent change 2006-2030	39.5%	53.7%
Annualized change 2006-2030	1.40%	1.81%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	110	15.5
2015	111	16.0
2020	111	16.3
2025	111	16.6
2030	110	16.9
Percent change 2006-2030	3.4%	13.9%
Annualized change 2006-2030	0.14%	0.54%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	57	8.1
2015	54	7.7
2020	51	7.4
2025	47	7.0
2030	43	6.7
Percent change 2006-2030	-27.9%	-20.6%
Annualized change 2006-2030	-1.35%	-0.95%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	43	6.2
2015	42	6.0
2020	40	5.9
2025	39	5.8
2030	36	5.6
Percent change 2006-2030	-17.2%	-8.8%
Annualized change 2006-2030	-0.78%	-0.38%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	88	12.5
2015	88	12.7
2020	88	12.9
2025	87	13.1
2030	87	13.3
Percent change 2006-2030	-0.5%	9.6%
Annualized change 2006-2030	-0.02%	0.38%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	32	4.6
2015	31	4.4
2020	29	4.2
2025	26	3.9
2030	24	3.8
Percent change 2006-2030	-28.0%	-20.6%
Annualized change 2006-2030	-1.36%	-0.96%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.2
2015	55	8.0
2020	53	7.8
2025	50	7.4
2030	46	7.1
Percent change 2006-2030	-23.5%	-15.7%
Annualized change 2006-2030	-1.11%	-0.71%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	205	29.1
2015	204	29.4
2020	199	29.2
2025	192	28.8
2030	185	28.5
Percent change 2006-2030	-8.6%	0.6%
Annualized change 2006-2030	-0.38%	0.03%

Central New York Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 113 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,319	328.0
2015	2,412	346.5
2020	2,473	361.9
2025	2,508	375.4
2030	2,525	388.5
Percent change 2006-2030	13.1%	24.6%
Annualized change 2006-2030	0.51%	0.92%

Figure 114 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	691	97.7	2010	1,628	230.3
2015	709	101.9	2015	1,702	244.6
2020	716	104.8	2020	1,757	257.1
2025	712	106.6	2025	1,796	268.8
2030	701	107.9	2030	1,824	280.6
Percent change 2006-2030	5.6%	16.3%	Percent change 2006-2030	16.3%	28.1%
Annualized change 2006-2030	0.23%	0.63%	Annualized change 2006-2030	0.63%	1.04%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 115 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	691	97.7	2010	263	37.3
2015	709	101.9	2015	271	38.9
2020	716	104.8	2020	271	39.7
2025	712	106.6	2025	266	39.9
2030	701	107.9	2030	257	39.6
Percent change 2006-2030	5.6%	16.3%	Percent change 2006-2030	0.5%	10.7%
Annualized change 2006-2030	0.23%	0.63%	Annualized change 2006-2030	0.02%	0.43%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	263	37.2	2010	164	23.2
2015	269	38.6	2015	170	24.4
2020	271	39.6	2020	174	25.5
2025	269	40.3	2025	177	26.5
2030	264	40.7	2030	179	27.6
Percent change 2006-2030	5.8%	16.5%	Percent change 2006-2030	13.6%	25.1%
Annualized change 2006-2030	0.23%	0.64%	Annualized change 2006-2030	0.53%	0.94%

Non-Primary Care Specialties

Figure 116 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	74	10.5
2015	81	11.6
2020	87	12.7
2025	91	13.6
2030	95	14.7
Percent change 2006-2030	34.5%	48.1%
Annualized change 2006-2030	1.24%	1.65%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	271	38.3
2015	301	43.3
2020	328	48.0
2025	351	52.5
2030	372	57.2
Percent change 2006-2030	47.5%	62.4%
Annualized change 2006-2030	1.63%	2.04%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	120	16.9
2015	123	17.7
2020	125	18.3
2025	126	18.8
2030	125	19.3
Percent change 2006-2030	7.9%	18.8%
Annualized change 2006-2030	0.32%	0.72%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	63	8.9
2015	60	8.6
2020	57	8.4
2025	54	8.1
2030	51	7.8
Percent change 2006-2030	-23.1%	-15.2%
Annualized change 2006-2030	-1.09%	-0.69%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	124	17.5
2015	122	17.6
2020	118	17.3
2025	113	17.0
2030	109	16.8
Percent change 2006-2030	-12.8%	-3.9%
Annualized change 2006-2030	-0.57%	-0.17%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	113	16.0
2015	115	16.5
2020	120	17.5
2025	123	18.4
2030	124	19.0
Percent change 2006-2030	13.5%	25.0%
Annualized change 2006-2030	0.53%	0.94%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	134	18.9
2015	141	20.3
2020	146	21.4
2025	150	22.4
2030	153	23.5
Percent change 2006-2030	22.1%	34.5%
Annualized change 2006-2030	0.84%	1.24%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	122	17.3
2015	139	20.0
2020	155	22.6
2025	168	25.2
2030	179	27.6
Percent change 2006-2030	61.4%	77.8%
Annualized change 2006-2030	2.02%	2.43%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	112	15.8
2015	118	16.9
2020	121	17.7
2025	125	18.7
2030	128	19.6
Percent change 2006-2030	20.4%	32.6%
Annualized change 2006-2030	0.78%	1.18%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.3
2015	57	8.2
2020	55	8.0
2025	52	7.8
2030	50	7.7
Percent change 2006-2030	-16.8%	-8.3%
Annualized change 2006-2030	-0.76%	-0.36%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	45	6.4
2020	44	6.5
2025	44	6.6
2030	42	6.5
Percent change 2006-2030	-3.5%	6.3%
Annualized change 2006-2030	-0.15%	0.25%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	90	12.8
2015	93	13.4
2020	95	13.9
2025	97	14.5
2030	99	15.2
Percent change 2006-2030	13.3%	24.8%
Annualized change 2006-2030	0.52%	0.93%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	33	4.7
2015	32	4.6
2020	31	4.5
2025	30	4.4
2030	28	4.4
Percent change 2006-2030	-16.6%	-8.1%
Annualized change 2006-2030	-0.75%	-0.35%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	60	8.4
2015	59	8.4
2020	58	8.4
2025	56	8.3
2030	54	8.2
Percent change 2006-2030	-10.8%	-1.8%
Annualized change 2006-2030	-0.48%	-0.07%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	210	29.7
2015	216	31.0
2020	218	31.8
2025	217	32.5
2030	216	33.3
Percent change 2006-2030	6.5%	17.3%
Annualized change 2006-2030	0.26%	0.67%

Central New York Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 117 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,268	320.8
2015	2,288	328.6
2020	2,278	333.3
2025	2,241	335.3
2030	2,187	336.5
Percent change 2006-2030	-2.1%	7.9%
Annualized change 2006-2030	-0.09%	0.32%

Figure 118 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	676	95.7	2010	1,592	225.1
2015	677	97.3	2015	1,610	231.3
2020	666	97.5	2020	1,612	235.8
2025	645	96.5	2025	1,596	238.8
2030	617	94.9	2030	1,570	241.5
Percent change 2006-2030	-7.0%	2.4%	Percent change 2006-2030	0.1%	10.2%
Annualized change 2006-2030	-0.30%	0.10%	Annualized change 2006-2030	0.00%	0.41%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 119 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	676	95.7	2010	259	36.7
2015	677	97.3	2015	260	37.4
2020	666	97.5	2020	255	37.3
2025	645	96.5	2025	245	36.6
2030	617	94.9	2030	231	35.5
Percent change 2006-2030	-7.0%	2.4%	Percent change 2006-2030	-9.7%	-0.6%
Annualized change 2006-2030	-0.30%	0.10%	Annualized change 2006-2030	-0.43%	-0.02%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	257	36.3	2010	160	22.7
2015	255	36.6	2015	162	23.3
2020	248	36.3	2020	163	23.9
2025	239	35.7	2025	161	24.2
2030	227	35.0	2030	159	24.4
Percent change 2006-2030	-9.1%	0.2%	Percent change 2006-2030	0.5%	10.7%
Annualized change 2006-2030	-0.40%	0.01%	Annualized change 2006-2030	0.02%	0.43%

Non-Primary Care Specialties

Figure 120 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	71	9.9	2006	252	35.2
2010	73	10.3	2010	265	37.5
2015	76	11.0	2015	284	40.8
2020	79	11.6	2020	299	43.8
2025	81	12.1	2025	309	46.3
2030	83	12.7	2030	317	48.7
Percent change 2006-2030	16.3%	28.1%	Percent change 2006-2030	25.7%	38.4%
Annualized change 2006-2030	0.63%	1.04%	Annualized change 2006-2030	0.96%	1.36%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	116	16.2	2006	66	9.2
2010	117	16.5	2010	62	8.7
2015	117	16.8	2015	57	8.2
2020	114	16.7	2020	53	7.7
2025	112	16.7	2025	48	7.2
2030	107	16.5	2030	44	6.8
Percent change 2006-2030	-7.8%	1.6%	Percent change 2006-2030	-33.4%	-26.6%
Annualized change 2006-2030	-0.34%	0.07%	Annualized change 2006-2030	-1.68%	-1.28%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	109	15.2
2010	120	17.0	2010	111	15.7
2015	115	16.5	2015	109	15.7
2020	107	15.6	2020	110	16.1
2025	98	14.7	2025	110	16.5
2030	91	14.0	2030	108	16.6
Percent change 2006-2030	-27.4%	-20.0%	Percent change 2006-2030	-0.8%	9.3%
Annualized change 2006-2030	-1.33%	-0.93%	Annualized change 2006-2030	-0.03%	0.37%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	111	15.5
2010	131	18.6	2010	119	16.9
2015	134	19.3	2015	133	19.0
2020	135	19.8	2020	142	20.8
2025	135	20.2	2025	150	22.4
2030	133	20.5	2030	155	23.9
Percent change 2006-2030	6.4%	17.2%	Percent change 2006-2030	39.7%	53.9%
Annualized change 2006-2030	0.26%	0.66%	Annualized change 2006-2030	1.40%	1.81%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	110	15.5
2015	111	16.0
2020	111	16.3
2025	111	16.6
2030	110	16.9
Percent change 2006-2030	3.6%	14.1%
Annualized change 2006-2030	0.15%	0.55%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	57	8.1
2015	54	7.7
2020	51	7.4
2025	47	7.0
2030	43	6.7
Percent change 2006-2030	-27.8%	-20.4%
Annualized change 2006-2030	-1.35%	-0.95%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	43	6.2
2015	42	6.0
2020	40	5.9
2025	39	5.8
2030	36	5.6
Percent change 2006-2030	-17.1%	-8.7%
Annualized change 2006-2030	-0.78%	-0.38%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	88	12.5
2015	88	12.7
2020	88	12.9
2025	88	13.1
2030	87	13.3
Percent change 2006-2030	-0.3%	9.8%
Annualized change 2006-2030	-0.01%	0.39%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	32	4.6
2015	31	4.4
2020	29	4.2
2025	26	3.9
2030	25	3.8
Percent change 2006-2030	-27.8%	-20.5%
Annualized change 2006-2030	-1.35%	-0.95%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.2
2015	55	8.0
2020	53	7.8
2025	50	7.4
2030	46	7.1
Percent change 2006-2030	-23.3%	-15.6%
Annualized change 2006-2030	-1.10%	-0.70%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	205	29.1
2015	205	29.4
2020	199	29.2
2025	193	28.8
2030	186	28.6
Percent change 2006-2030	-8.5%	0.8%
Annualized change 2006-2030	-0.37%	0.03%

Central New York Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 121 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,313	327.2
2015	2,376	341.4
2020	2,408	352.3
2025	2,414	361.2
2030	2,407	370.3
Percent change 2006-2030	7.8%	18.7%
Annualized change 2006-2030	0.31%	0.72%

Figure 122 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	689	97.5	2010	1,624	229.7
2015	700	100.5	2015	1,676	240.8
2020	699	102.2	2020	1,709	250.1
2025	687	102.9	2025	1,726	258.4
2030	670	103.0	2030	1,737	267.3
Percent change 2006-2030	0.9%	11.1%	Percent change 2006-2030	10.7%	22.0%
Annualized change 2006-2030	0.04%	0.44%	Annualized change 2006-2030	0.43%	0.83%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 123 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	689	97.5	2010	263	37.2
2015	700	100.5	2015	267	38.3
2020	699	102.2	2020	265	38.7
2025	687	102.9	2025	257	38.5
2030	670	103.0	2030	246	37.8
Percent change 2006-2030	0.9%	11.1%	Percent change 2006-2030	-4.0%	5.7%
Annualized change 2006-2030	0.04%	0.44%	Annualized change 2006-2030	-0.17%	0.23%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	262	37.1	2010	164	23.2
2015	265	38.1	2015	168	24.1
2020	264	38.7	2020	170	24.9
2025	260	38.8	2025	171	25.5
2030	253	38.9	2030	171	26.4
Percent change 2006-2030	1.0%	11.3%	Percent change 2006-2030	8.5%	19.5%
Annualized change 2006-2030	0.04%	0.45%	Annualized change 2006-2030	0.34%	0.74%

Non-Primary Care Specialties

Figure 124 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	74	10.5
2015	80	11.5
2020	84	12.3
2025	88	13.1
2030	91	14.0
Percent change 2006-2030	28.1%	41.1%
Annualized change 2006-2030	1.04%	1.44%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	270	38.2
2015	297	42.6
2020	319	46.7
2025	337	50.5
2030	354	54.4
Percent change 2006-2030	40.4%	54.7%
Annualized change 2006-2030	1.42%	1.83%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	119	16.9
2015	122	17.5
2020	122	17.8
2025	121	18.1
2030	119	18.3
Percent change 2006-2030	2.8%	13.2%
Annualized change 2006-2030	0.11%	0.52%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	63	8.9
2015	59	8.5
2020	56	8.2
2025	52	7.8
2030	48	7.4
Percent change 2006-2030	-26.7%	-19.3%
Annualized change 2006-2030	-1.29%	-0.89%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	123	17.4
2015	120	17.3
2020	115	16.8
2025	109	16.3
2030	104	16.0
Percent change 2006-2030	-16.9%	-8.5%
Annualized change 2006-2030	-0.77%	-0.37%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	113	16.0
2015	113	16.2
2020	116	17.0
2025	118	17.7
2030	118	18.1
Percent change 2006-2030	8.1%	19.1%
Annualized change 2006-2030	0.33%	0.73%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	133	18.9
2015	139	20.0
2020	142	20.8
2025	144	21.6
2030	145	22.4
Percent change 2006-2030	16.3%	28.1%
Annualized change 2006-2030	0.63%	1.04%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	122	17.3
2015	137	19.7
2020	150	22.0
2025	162	24.2
2030	171	26.3
Percent change 2006-2030	53.8%	69.4%
Annualized change 2006-2030	1.81%	2.22%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	111	15.7
2015	116	16.7
2020	118	17.3
2025	120	18.0
2030	122	18.7
Percent change 2006-2030	14.7%	26.3%
Annualized change 2006-2030	0.57%	0.98%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.3
2015	56	8.0
2020	53	7.8
2025	50	7.5
2030	48	7.3
Percent change 2006-2030	-20.7%	-12.7%
Annualized change 2006-2030	-0.96%	-0.56%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	44	6.3
2020	43	6.3
2025	42	6.3
2030	40	6.2
Percent change 2006-2030	-8.1%	1.2%
Annualized change 2006-2030	-0.35%	0.05%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	90	12.7
2015	92	13.1
2020	93	13.6
2025	93	14.0
2030	94	14.4
Percent change 2006-2030	7.9%	18.9%
Annualized change 2006-2030	0.32%	0.72%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	33	4.7
2015	31	4.5
2020	30	4.4
2025	28	4.2
2030	27	4.2
Percent change 2006-2030	-20.6%	-12.5%
Annualized change 2006-2030	-0.95%	-0.55%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.4
2015	58	8.3
2020	56	8.2
2025	54	8.0
2030	51	7.8
Percent change 2006-2030	-15.1%	-6.4%
Annualized change 2006-2030	-0.68%	-0.28%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	210	29.7
2015	213	30.6
2020	212	31.0
2025	209	31.2
2030	206	31.7
Percent change 2006-2030	1.4%	11.7%
Annualized change 2006-2030	0.06%	0.46%

Central New York Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 125 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,263	320.1
2015	2,257	324.2
2020	2,221	325.0
2025	2,158	323.0
2030	2,084	320.6
Percent change 2006-2030	-6.7%	2.8%
Annualized change 2006-2030	-0.29%	0.12%

Figure 126 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	675	95.5	2010	1,588	224.6
2015	669	96.1	2015	1,588	228.1
2020	651	95.3	2020	1,570	229.7
2025	623	93.2	2025	1,536	229.8
2030	590	90.7	2030	1,494	229.9
Percent change 2006-2030	-11.2%	-2.2%	Percent change 2006-2030	-4.8%	4.9%
Annualized change 2006-2030	-0.49%	-0.09%	Annualized change 2006-2030	-0.20%	0.20%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 127 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	675	95.5	2010	259	36.6
2015	669	96.1	2015	257	37.0
2020	651	95.3	2020	249	36.4
2025	623	93.2	2025	236	35.4
2030	590	90.7	2030	221	34.0
Percent change 2006-2030	-11.2%	-2.2%	Percent change 2006-2030	-13.8%	-5.0%
Annualized change 2006-2030	-0.49%	-0.09%	Annualized change 2006-2030	-0.61%	-0.21%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	256	36.3	2010	160	22.6
2015	252	36.1	2015	160	23.0
2020	242	35.5	2020	160	23.4
2025	231	34.5	2025	156	23.3
2030	217	33.4	2030	152	23.3
Percent change 2006-2030	-13.1%	-4.3%	Percent change 2006-2030	-3.9%	5.8%
Annualized change 2006-2030	-0.58%	-0.18%	Annualized change 2006-2030	-0.17%	0.24%

Non-Primary Care Specialties

Figure 128 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	73	10.3
2015	75	10.8
2020	77	11.3
2025	78	11.6
2030	79	12.1
Percent change 2006-2030	10.7%	21.9%
Annualized change 2006-2030	0.42%	0.83%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	264	37.4
2015	280	40.2
2020	291	42.6
2025	298	44.6
2030	301	46.4
Percent change 2006-2030	19.6%	31.8%
Annualized change 2006-2030	0.75%	1.16%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	116	16.5
2015	115	16.6
2020	111	16.3
2025	107	16.1
2030	102	15.7
Percent change 2006-2030	-12.2%	-3.3%
Annualized change 2006-2030	-0.54%	-0.14%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	61	8.7
2015	56	8.1
2020	51	7.5
2025	47	7.0
2030	42	6.4
Percent change 2006-2030	-36.6%	-30.2%
Annualized change 2006-2030	-1.88%	-1.48%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	120	17.0
2015	113	16.2
2020	104	15.2
2025	94	14.1
2030	86	13.3
Percent change 2006-2030	-30.9%	-23.9%
Annualized change 2006-2030	-1.53%	-1.13%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	110	15.6
2015	108	15.5
2020	107	15.7
2025	106	15.9
2030	103	15.8
Percent change 2006-2030	-5.6%	4.0%
Annualized change 2006-2030	-0.24%	0.16%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	131	18.5
2015	132	19.0
2020	132	19.3
2025	130	19.4
2030	127	19.5
Percent change 2006-2030	1.3%	11.6%
Annualized change 2006-2030	0.05%	0.46%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	119	16.8
2015	131	18.8
2020	139	20.3
2025	144	21.5
2030	148	22.7
Percent change 2006-2030	33.0%	46.5%
Annualized change 2006-2030	1.20%	1.60%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	109	15.5
2015	110	15.8
2020	109	15.9
2025	107	16.0
2030	105	16.1
Percent change 2006-2030	-1.4%	8.6%
Annualized change 2006-2030	-0.06%	0.35%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	57	8.0
2015	53	7.6
2020	50	7.3
2025	45	6.7
2030	41	6.3
Percent change 2006-2030	-31.2%	-24.3%
Annualized change 2006-2030	-1.55%	-1.15%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	43	6.1
2015	41	6.0
2020	39	5.8
2025	38	5.6
2030	35	5.3
Percent change 2006-2030	-21.1%	-13.1%
Annualized change 2006-2030	-0.98%	-0.58%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	88	12.5
2015	87	12.5
2020	86	12.6
2025	84	12.6
2030	83	12.7
Percent change 2006-2030	-5.1%	4.5%
Annualized change 2006-2030	-0.22%	0.18%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	32	4.6
2015	30	4.3
2020	28	4.1
2025	25	3.8
2030	23	3.6
Percent change 2006-2030	-31.3%	-24.3%
Annualized change 2006-2030	-1.55%	-1.16%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.2
2015	55	7.9
2020	52	7.6
2025	48	7.2
2030	44	6.7
Percent change 2006-2030	-27.0%	-19.6%
Annualized change 2006-2030	-1.30%	-0.91%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	205	29.0
2015	202	29.0
2020	194	28.4
2025	185	27.7
2030	177	27.2
Percent change 2006-2030	-12.9%	-4.0%
Annualized change 2006-2030	-0.57%	-0.17%

Central New York Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 129 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,313	327.2
2015	2,376	341.4
2020	2,408	352.3
2025	2,414	361.2
2030	2,407	370.3
Percent change 2006-2030	7.8%	18.7%
Annualized change 2006-2030	0.31%	0.72%

Figure 130 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	689	97.5	2010	1,624	229.7
2015	701	100.8	2015	1,675	240.6
2020	702	102.6	2020	1,707	249.7
2025	691	103.4	2025	1,722	257.8
2030	675	103.8	2030	1,733	266.5
Percent change 2006-2030	1.6%	11.9%	Percent change 2006-2030	10.4%	21.6%
Annualized change 2006-2030	0.07%	0.47%	Annualized change 2006-2030	0.41%	0.82%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 131 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	689	97.5	2010	263	37.2
2015	701	100.8	2015	267	38.4
2020	702	102.6	2020	266	38.9
2025	691	103.4	2025	258	38.7
2030	675	103.8	2030	248	38.1
Percent change 2006-2030	1.6%	11.9%	Percent change 2006-2030	-3.3%	6.5%
Annualized change 2006-2030	0.07%	0.47%	Annualized change 2006-2030	-0.14%	0.26%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	262	37.1	2010	164	23.2
2015	266	38.2	2015	168	24.1
2020	265	38.8	2020	171	25.0
2025	261	39.1	2025	172	25.7
2030	254	39.1	2030	173	26.6
Percent change 2006-2030	1.8%	12.1%	Percent change 2006-2030	9.3%	20.3%
Annualized change 2006-2030	0.07%	0.48%	Annualized change 2006-2030	0.37%	0.77%

Non-Primary Care Specialties

Figure 132 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	74	10.5
2015	80	11.5
2020	84	12.3
2025	87	13.1
2030	91	13.9
Percent change 2006-2030	27.7%	40.7%
Annualized change 2006-2030	1.02%	1.43%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	270	38.2
2015	296	42.6
2020	319	46.6
2025	336	50.4
2030	353	54.3
Percent change 2006-2030	40.0%	54.3%
Annualized change 2006-2030	1.41%	1.82%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	119	16.9
2015	122	17.5
2020	122	17.8
2025	121	18.0
2030	119	18.3
Percent change 2006-2030	2.5%	12.9%
Annualized change 2006-2030	0.10%	0.51%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	63	8.9
2015	59	8.5
2020	56	8.1
2025	52	7.8
2030	48	7.4
Percent change 2006-2030	-26.9%	-19.5%
Annualized change 2006-2030	-1.30%	-0.90%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	123	17.4
2015	120	17.3
2020	115	16.8
2025	109	16.3
2030	104	15.9
Percent change 2006-2030	-17.2%	-8.8%
Annualized change 2006-2030	-0.78%	-0.38%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	113	16.0
2015	113	16.2
2020	116	17.0
2025	118	17.6
2030	118	18.1
Percent change 2006-2030	7.8%	18.7%
Annualized change 2006-2030	0.31%	0.72%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	133	18.9
2015	139	20.0
2020	142	20.8
2025	144	21.5
2030	145	22.3
Percent change 2006-2030	16.0%	27.8%
Annualized change 2006-2030	0.62%	1.03%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	122	17.3
2015	137	19.7
2020	150	22.0
2025	161	24.1
2030	170	26.2
Percent change 2006-2030	53.3%	68.9%
Annualized change 2006-2030	1.80%	2.21%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	111	15.7
2015	116	16.6
2020	118	17.2
2025	120	17.9
2030	121	18.6
Percent change 2006-2030	14.3%	25.9%
Annualized change 2006-2030	0.56%	0.97%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.3
2015	56	8.0
2020	53	7.8
2025	50	7.5
2030	47	7.3
Percent change 2006-2030	-20.9%	-12.9%
Annualized change 2006-2030	-0.97%	-0.57%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	44	6.3
2020	43	6.3
2025	42	6.3
2030	40	6.2
Percent change 2006-2030	-8.4%	0.9%
Annualized change 2006-2030	-0.36%	0.04%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	90	12.7
2015	91	13.1
2020	93	13.5
2025	93	13.9
2030	94	14.4
Percent change 2006-2030	7.6%	18.6%
Annualized change 2006-2030	0.31%	0.71%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	33	4.7
2015	31	4.5
2020	30	4.3
2025	28	4.2
2030	27	4.1
Percent change 2006-2030	-20.8%	-12.7%
Annualized change 2006-2030	-0.97%	-0.57%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.4
2015	58	8.3
2020	56	8.2
2025	53	8.0
2030	51	7.8
Percent change 2006-2030	-15.3%	-6.7%
Annualized change 2006-2030	-0.69%	-0.29%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	210	29.7
2015	213	30.5
2020	211	30.9
2025	208	31.2
2030	205	31.6
Percent change 2006-2030	1.2%	11.4%
Annualized change 2006-2030	0.05%	0.45%

Central New York Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 133 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,263	320.1
2015	2,257	324.2
2020	2,221	325.0
2025	2,158	323.0
2030	2,084	320.6
Percent change 2006-2030	-6.7%	2.8%
Annualized change 2006-2030	-0.29%	0.12%

Figure 134 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	675	95.5	2010	1,588	224.6
2015	670	96.3	2015	1,587	227.9
2020	654	95.6	2020	1,568	229.4
2025	626	93.7	2025	1,532	229.3
2030	594	91.4	2030	1,490	229.2
Percent change 2006-2030	-10.5%	-1.5%	Percent change 2006-2030	-5.0%	4.6%
Annualized change 2006-2030	-0.46%	-0.06%	Annualized change 2006-2030	-0.21%	0.19%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 135 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	675	95.5	2010	259	36.6
2015	670	96.3	2015	258	37.0
2020	654	95.6	2020	250	36.6
2025	626	93.7	2025	238	35.6
2030	594	91.4	2030	222	34.2
Percent change 2006-2030	-10.5%	-1.5%	Percent change 2006-2030	-13.1%	-4.3%
Annualized change 2006-2030	-0.46%	-0.06%	Annualized change 2006-2030	-0.58%	-0.18%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	256	36.3	2010	160	22.6
2015	252	36.2	2015	160	23.0
2020	243	35.6	2020	160	23.5
2025	232	34.7	2025	157	23.5
2030	219	33.7	2030	153	23.5
Percent change 2006-2030	-12.5%	-3.6%	Percent change 2006-2030	-3.2%	6.6%
Annualized change 2006-2030	-0.55%	-0.15%	Annualized change 2006-2030	-0.14%	0.27%

Non-Primary Care Specialties

Figure 136 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	73	10.3
2015	75	10.8
2020	77	11.3
2025	77	11.6
2030	78	12.1
Percent change 2006-2030	10.4%	21.6%
Annualized change 2006-2030	0.41%	0.82%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	264	37.4
2015	280	40.2
2020	291	42.6
2025	297	44.5
2030	301	46.2
Percent change 2006-2030	19.3%	31.4%
Annualized change 2006-2030	0.74%	1.14%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	116	16.5
2015	115	16.5
2020	111	16.3
2025	107	16.0
2030	102	15.6
Percent change 2006-2030	-12.4%	-3.6%
Annualized change 2006-2030	-0.55%	-0.15%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	61	8.7
2015	56	8.0
2020	51	7.5
2025	46	7.0
2030	42	6.4
Percent change 2006-2030	-36.8%	-30.4%
Annualized change 2006-2030	-1.89%	-1.50%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	120	17.0
2015	113	16.2
2020	104	15.2
2025	94	14.1
2030	86	13.3
Percent change 2006-2030	-31.1%	-24.1%
Annualized change 2006-2030	-1.54%	-1.14%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	110	15.6
2015	108	15.5
2020	107	15.7
2025	106	15.8
2030	103	15.8
Percent change 2006-2030	-5.8%	3.7%
Annualized change 2006-2030	-0.25%	0.15%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	131	18.5
2015	132	19.0
2020	132	19.2
2025	129	19.3
2030	126	19.4
Percent change 2006-2030	1.0%	11.3%
Annualized change 2006-2030	0.04%	0.45%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	119	16.8
2015	131	18.8
2020	138	20.2
2025	144	21.5
2030	147	22.6
Percent change 2006-2030	32.6%	46.1%
Annualized change 2006-2030	1.18%	1.59%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	109	15.5
2015	110	15.7
2020	108	15.9
2025	106	15.9
2030	104	16.0
Percent change 2006-2030	-1.7%	8.3%
Annualized change 2006-2030	-0.07%	0.33%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	57	8.0
2015	53	7.6
2020	49	7.2
2025	45	6.7
2030	41	6.3
Percent change 2006-2030	-31.4%	-24.5%
Annualized change 2006-2030	-1.56%	-1.16%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	43	6.1
2015	41	6.0
2020	39	5.7
2025	38	5.6
2030	35	5.3
Percent change 2006-2030	-21.3%	-13.3%
Annualized change 2006-2030	-0.99%	-0.59%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	88	12.5
2015	87	12.5
2020	86	12.6
2025	84	12.6
2030	82	12.7
Percent change 2006-2030	-5.4%	4.2%
Annualized change 2006-2030	-0.23%	0.17%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	32	4.6
2015	30	4.3
2020	28	4.1
2025	25	3.8
2030	23	3.6
Percent change 2006-2030	-31.5%	-24.6%
Annualized change 2006-2030	-1.56%	-1.17%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.2
2015	55	7.8
2020	52	7.6
2025	48	7.1
2030	44	6.7
Percent change 2006-2030	-27.2%	-19.8%
Annualized change 2006-2030	-1.32%	-0.92%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	205	29.0
2015	202	28.9
2020	194	28.4
2025	185	27.7
2030	176	27.1
Percent change 2006-2030	-13.1%	-4.3%
Annualized change 2006-2030	-0.58%	-0.18%

Central New York Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 137 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,313	327.2
2015	2,376	341.4
2020	2,408	352.3
2025	2,414	361.2
2030	2,407	370.3
Percent change 2006-2030	7.8%	18.7%
Annualized change 2006-2030	0.31%	0.72%

Figure 138 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	689	97.5	2010	1,624	229.6
2015	702	100.9	2015	1,674	240.5
2020	703	102.9	2020	1,705	249.5
2025	694	103.8	2025	1,720	257.4
2030	678	104.2	2030	1,730	266.1
Percent change 2006-2030	2.0%	12.4%	Percent change 2006-2030	10.2%	21.4%
Annualized change 2006-2030	0.08%	0.49%	Annualized change 2006-2030	0.41%	0.81%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 139 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	689	97.5	2010	263	37.2
2015	702	100.9	2015	268	38.5
2020	703	102.9	2020	266	38.9
2025	694	103.8	2025	259	38.8
2030	678	104.2	2030	249	38.3
Percent change 2006-2030	2.0%	12.4%	Percent change 2006-2030	-2.9%	7.0%
Annualized change 2006-2030	0.08%	0.49%	Annualized change 2006-2030	-0.12%	0.28%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	262	37.1	2010	164	23.2
2015	266	38.3	2015	168	24.2
2020	266	38.9	2020	171	25.0
2025	262	39.2	2025	172	25.8
2030	256	39.3	2030	173	26.7
Percent change 2006-2030	2.2%	12.6%	Percent change 2006-2030	9.7%	20.9%
Annualized change 2006-2030	0.09%	0.50%	Annualized change 2006-2030	0.39%	0.79%

Non-Primary Care Specialties

Figure 140 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	71	9.9	2006	252	35.2
2010	74	10.5	2010	270	38.2
2015	80	11.5	2015	296	42.5
2020	84	12.3	2020	318	46.6
2025	87	13.1	2025	336	50.3
2030	91	13.9	2030	352	54.2
Percent change 2006-2030	27.5%	40.4%	Percent change 2006-2030	39.8%	54.0%
Annualized change 2006-2030	1.02%	1.43%	Annualized change 2006-2030	1.41%	1.82%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	116	16.2	2006	66	9.2
2010	119	16.9	2010	63	8.9
2015	121	17.4	2015	59	8.5
2020	122	17.8	2020	56	8.1
2025	120	18.0	2025	52	7.8
2030	119	18.3	2030	48	7.4
Percent change 2006-2030	2.3%	12.7%	Percent change 2006-2030	-27.0%	-19.6%
Annualized change 2006-2030	0.09%	0.50%	Annualized change 2006-2030	-1.31%	-0.91%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	109	15.2
2010	123	17.4	2010	113	16.0
2015	120	17.3	2015	113	16.2
2020	115	16.8	2020	116	17.0
2025	108	16.2	2025	118	17.6
2030	103	15.9	2030	117	18.0
Percent change 2006-2030	-17.3%	-8.9%	Percent change 2006-2030	7.6%	18.5%
Annualized change 2006-2030	-0.79%	-0.39%	Annualized change 2006-2030	0.31%	0.71%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	125	17.5	2006	111	15.5
2010	133	18.9	2010	122	17.3
2015	139	20.0	2015	137	19.7
2020	142	20.8	2020	150	22.0
2025	144	21.5	2025	161	24.1
2030	145	22.3	2030	170	26.1
Percent change 2006-2030	15.8%	27.5%	Percent change 2006-2030	53.1%	68.6%
Annualized change 2006-2030	0.61%	1.02%	Annualized change 2006-2030	1.79%	2.20%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	111	15.7
2015	116	16.6
2020	118	17.2
2025	120	17.9
2030	121	18.6
Percent change 2006-2030	14.1%	25.7%
Annualized change 2006-2030	0.55%	0.96%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.3
2015	56	8.0
2020	53	7.8
2025	50	7.5
2030	47	7.3
Percent change 2006-2030	-21.1%	-13.1%
Annualized change 2006-2030	-0.98%	-0.58%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	44	6.3
2020	43	6.3
2025	42	6.3
2030	40	6.2
Percent change 2006-2030	-8.5%	0.8%
Annualized change 2006-2030	-0.37%	0.03%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	90	12.7
2015	91	13.1
2020	92	13.5
2025	93	13.9
2030	93	14.4
Percent change 2006-2030	7.4%	18.4%
Annualized change 2006-2030	0.30%	0.70%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	33	4.7
2015	31	4.5
2020	30	4.3
2025	28	4.2
2030	27	4.1
Percent change 2006-2030	-20.9%	-12.9%
Annualized change 2006-2030	-0.97%	-0.57%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	59	8.4
2015	58	8.3
2020	56	8.2
2025	53	8.0
2030	51	7.8
Percent change 2006-2030	-15.5%	-6.9%
Annualized change 2006-2030	-0.70%	-0.30%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	210	29.6
2015	212	30.5
2020	211	30.9
2025	208	31.1
2030	205	31.5
Percent change 2006-2030	1.0%	11.2%
Annualized change 2006-2030	0.04%	0.44%

Central New York Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 141 – Central New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	2,233	311.9
2010	2,263	320.1
2015	2,257	324.2
2020	2,221	325.0
2025	2,158	323.0
2030	2,084	320.6
Percent change 2006-2030	-6.7%	2.8%
Annualized change 2006-2030	-0.29%	0.12%

Figure 142 – Central New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	675	95.5	2010	1,588	224.6
2015	671	96.4	2015	1,586	227.8
2020	655	95.8	2020	1,566	229.2
2025	628	94.0	2025	1,530	229.0
2030	597	91.8	2030	1,488	228.8
Percent change 2006-2030	-10.1%	-1.0%	Percent change 2006-2030	-5.2%	4.4%
Annualized change 2006-2030	-0.44%	-0.04%	Annualized change 2006-2030	-0.22%	0.18%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 143 – Central New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	675	95.5	2010	259	36.6
2015	671	96.4	2015	258	37.1
2020	655	95.8	2020	251	36.7
2025	628	94.0	2025	238	35.7
2030	597	91.8	2030	223	34.4
Percent change 2006-2030	-10.1%	-1.0%	Percent change 2006-2030	-12.7%	-3.9%
Annualized change 2006-2030	-0.44%	-0.04%	Annualized change 2006-2030	-0.57%	-0.17%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	257	36.3	2010	160	22.6
2015	252	36.2	2015	161	23.1
2020	244	35.7	2020	161	23.5
2025	233	34.8	2025	157	23.5
2030	220	33.8	2030	154	23.6
Percent change 2006-2030	-12.1%	-3.2%	Percent change 2006-2030	-2.8%	7.0%
Annualized change 2006-2030	-0.54%	-0.14%	Annualized change 2006-2030	-0.12%	0.28%

Non-Primary Care Specialties

Figure 144 – Central New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	71	9.9
2010	73	10.3
2015	75	10.8
2020	77	11.3
2025	77	11.6
2030	78	12.0
Percent change 2006-2030	10.2%	21.3%
Annualized change 2006-2030	0.40%	0.81%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	252	35.2
2010	264	37.4
2015	280	40.2
2020	291	42.5
2025	297	44.4
2030	300	46.2
Percent change 2006-2030	19.1%	31.2%
Annualized change 2006-2030	0.73%	1.14%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	116	16.2
2010	116	16.5
2015	115	16.5
2020	111	16.3
2025	107	16.0
2030	101	15.6
Percent change 2006-2030	-12.6%	-3.7%
Annualized change 2006-2030	-0.56%	-0.16%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	66	9.2
2010	61	8.7
2015	56	8.0
2020	51	7.5
2025	46	6.9
2030	42	6.4
Percent change 2006-2030	-36.9%	-30.5%
Annualized change 2006-2030	-1.90%	-1.50%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	120	17.0
2015	113	16.2
2020	104	15.2
2025	94	14.1
2030	86	13.2
Percent change 2006-2030	-31.2%	-24.2%
Annualized change 2006-2030	-1.55%	-1.15%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	109	15.2
2010	110	15.6
2015	108	15.4
2020	107	15.7
2025	106	15.8
2030	102	15.8
Percent change 2006-2030	-6.0%	3.5%
Annualized change 2006-2030	-0.26%	0.15%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	125	17.5
2010	131	18.5
2015	132	19.0
2020	131	19.2
2025	129	19.3
2030	126	19.4
Percent change 2006-2030	0.8%	11.1%
Annualized change 2006-2030	0.03%	0.44%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	111	15.5
2010	119	16.8
2015	130	18.7
2020	138	20.2
2025	143	21.5
2030	147	22.6
Percent change 2006-2030	32.4%	45.8%
Annualized change 2006-2030	1.18%	1.58%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	106	14.8
2010	109	15.5
2015	110	15.7
2020	108	15.9
2025	106	15.9
2030	104	16.0
Percent change 2006-2030	-1.8%	8.1%
Annualized change 2006-2030	-0.08%	0.33%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	57	8.0
2015	53	7.6
2020	49	7.2
2025	45	6.7
2030	41	6.3
Percent change 2006-2030	-31.5%	-24.6%
Annualized change 2006-2030	-1.57%	-1.17%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	6.1
2010	43	6.1
2015	41	6.0
2020	39	5.7
2025	37	5.6
2030	35	5.3
Percent change 2006-2030	-21.4%	-13.5%
Annualized change 2006-2030	-1.00%	-0.60%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	87	12.2
2010	88	12.5
2015	87	12.5
2020	86	12.6
2025	84	12.6
2030	82	12.6
Percent change 2006-2030	-5.6%	4.0%
Annualized change 2006-2030	-0.24%	0.16%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	34	4.7
2010	32	4.6
2015	30	4.3
2020	28	4.1
2025	25	3.8
2030	23	3.6
Percent change 2006-2030	-31.6%	-24.7%
Annualized change 2006-2030	-1.57%	-1.17%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	8.4
2010	58	8.2
2015	55	7.8
2020	52	7.6
2025	48	7.1
2030	44	6.7
Percent change 2006-2030	-27.4%	-20.0%
Annualized change 2006-2030	-1.32%	-0.92%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	203	28.4
2010	205	29.0
2015	201	28.9
2020	194	28.4
2025	185	27.6
2030	176	27.1
Percent change 2006-2030	-13.3%	-4.5%
Annualized change 2006-2030	-0.59%	-0.19%

Finger Lakes Physician Supply, 2006 – 2030
Finger Lakes Supply Scenario 1: Baseline (Supply Not Responsive to Demand)

Figure 145 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,974	329.5
2015	4,106	340.2
2020	4,187	347.3
2025	4,221	352.0
2030	4,229	356.5
Percent change 2006-2030	10.6%	12.4%
Annualized change 2006-2030	0.42%	0.49%

Figure 146 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,380	114.4	2010	2,593	215.0
2015	1,411	116.9	2015	2,695	223.3
2020	1,419	117.7	2020	2,768	229.6
2025	1,407	117.4	2025	2,814	234.6
2030	1,383	116.6	2030	2,847	240.0
Percent change 2006-2030	4.4%	6.1%	Percent change 2006-2030	13.9%	15.8%
Annualized change 2006-2030	0.18%	0.25%	Annualized change 2006-2030	0.54%	0.61%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 147 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,380	114.4	2010	337	28.0
2015	1,411	116.9	2015	345	28.6
2020	1,419	117.7	2020	344	28.6
2025	1,407	117.4	2025	337	28.1
2030	1,383	116.6	2030	324	27.3
Percent change 2006-2030	4.4%	6.1%	Percent change 2006-2030	-1.2%	0.4%
Annualized change 2006-2030	0.18%	0.25%	Annualized change 2006-2030	-0.05%	0.02%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	734	60.8	2010	310	25.7
2015	747	61.9	2015	319	26.4
2020	750	62.2	2020	325	27.0
2025	741	61.8	2025	329	27.5
2030	726	61.2	2030	333	28.0
Percent change 2006-2030	4.0%	5.7%	Percent change 2006-2030	11.6%	13.5%
Annualized change 2006-2030	0.16%	0.23%	Annualized change 2006-2030	0.46%	0.53%

Non-Primary Care Specialties

Figure 148 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	107	8.9
2015	116	9.6
2020	123	10.2
2025	128	10.7
2030	134	11.3
Percent change 2006-2030	31.0%	33.1%
Annualized change 2006-2030	1.13%	1.20%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	480	39.8
2015	530	43.9
2020	573	47.6
2025	609	50.8
2030	642	54.1
Percent change 2006-2030	43.6%	45.9%
Annualized change 2006-2030	1.52%	1.59%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	204	16.9
2015	209	17.3
2020	211	17.5
2025	210	17.5
2030	208	17.5
Percent change 2006-2030	5.1%	6.8%
Annualized change 2006-2030	0.21%	0.27%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.1
2015	92	7.6
2020	87	7.2
2025	82	6.8
2030	76	6.4
Percent change 2006-2030	-25.0%	-23.8%
Annualized change 2006-2030	-1.19%	-1.13%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	208	17.3
2015	205	17.0
2020	196	16.3
2025	187	15.6
2030	179	15.1
Percent change 2006-2030	-15.0%	-13.7%
Annualized change 2006-2030	-0.68%	-0.61%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	235	19.5
2015	237	19.6
2020	246	20.4
2025	250	20.9
2030	251	21.2
Percent change 2006-2030	10.6%	12.3%
Annualized change 2006-2030	0.42%	0.49%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	220	18.3
2015	231	19.2
2020	238	19.7
2025	242	20.2
2030	245	20.7
Percent change 2006-2030	19.0%	20.9%
Annualized change 2006-2030	0.73%	0.79%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	171	14.2
2015	193	16.0
2020	213	17.6
2025	230	19.2
2030	244	20.5
Percent change 2006-2030	57.2%	59.8%
Annualized change 2006-2030	1.90%	1.97%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	135	11.2
2015	141	11.7
2020	144	12.0
2025	148	12.3
2030	150	12.7
Percent change 2006-2030	17.3%	19.2%
Annualized change 2006-2030	0.67%	0.73%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	78	6.5
2020	75	6.2
2025	71	5.9
2030	67	5.7
Percent change 2006-2030	-18.9%	-17.6%
Annualized change 2006-2030	-0.87%	-0.80%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.7
2015	44	3.7
2020	43	3.6
2025	43	3.6
2030	41	3.5
Percent change 2006-2030	-6.0%	-4.5%
Annualized change 2006-2030	-0.26%	-0.19%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	135	11.2
2015	138	11.4
2020	140	11.6
2025	142	11.8
2030	144	12.1
Percent change 2006-2030	10.4%	12.2%
Annualized change 2006-2030	0.41%	0.48%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.2
2020	37	3.1
2025	36	3.0
2030	34	2.9
Percent change 2006-2030	-18.8%	-17.4%
Annualized change 2006-2030	-0.86%	-0.80%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.3
2015	50	4.2
2020	49	4.1
2025	47	3.9
2030	45	3.8
Percent change 2006-2030	-13.1%	-11.7%
Annualized change 2006-2030	-0.59%	-0.52%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	385	31.9
2015	393	32.5
2020	393	32.6
2025	389	32.5
2030	386	32.5
Percent change 2006-2030	3.8%	5.4%
Annualized change 2006-2030	0.15%	0.22%

Finger Lakes Supply Scenario 1: Baseline (Supply Responsive to Demand)

Figure 149 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,937	326.5
2015	4,020	333.1
2020	4,049	335.9
2025	4,031	336.2
2030	3,974	335.0
Percent change 2006-2030	3.9%	5.6%
Annualized change 2006-2030	0.16%	0.23%

Figure 150 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,368	113.4	2010	2,570	213.1
2015	1,386	114.8	2015	2,635	218.3
2020	1,380	114.5	2020	2,669	221.4
2025	1,352	112.8	2025	2,679	223.4
2030	1,308	110.3	2030	2,666	224.7
Percent change 2006-2030	-1.2%	0.4%	Percent change 2006-2030	6.7%	8.4%
Annualized change 2006-2030	-0.05%	0.02%	Annualized change 2006-2030	0.27%	0.34%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 151 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,368	113.4	2010	336	27.9
2015	1,386	114.8	2015	342	28.4
2020	1,380	114.5	2020	340	28.2
2025	1,352	112.8	2025	330	27.5
2030	1,308	110.3	2030	315	26.5
Percent change 2006-2030	-1.2%	0.4%	Percent change 2006-2030	-4.0%	-2.4%
Annualized change 2006-2030	-0.05%	0.02%	Annualized change 2006-2030	-0.17%	-0.10%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	726	60.2	2010	305	25.3
2015	729	60.4	2015	314	26.0
2020	722	59.9	2020	318	26.4
2025	703	58.6	2025	319	26.6
2030	677	57.0	2030	317	26.7
Percent change 2006-2030	-3.1%	-1.5%	Percent change 2006-2030	6.3%	8.1%
Annualized change 2006-2030	-0.13%	-0.06%	Annualized change 2006-2030	0.26%	0.32%

Non-Primary Care Specialties

Figure 152 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	105	8.7
2015	113	9.4
2020	119	9.8
2025	122	10.2
2030	125	10.5
Percent change 2006-2030	22.2%	24.2%
Annualized change 2006-2030	0.84%	0.91%

Other Internal Medicine Subspecialties

Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	475	39.4
2015	517	42.8
2020	551	45.7
2025	576	48.0
2030	595	50.2
Percent change 2006-2030	33.2%	35.3%
Annualized change 2006-2030	1.20%	1.27%

Obstetrics and Gynecology

Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	202	16.8
2015	204	16.9
2020	202	16.8
2025	198	16.6
2030	194	16.3
Percent change 2006-2030	-2.1%	-0.5%
Annualized change 2006-2030	-0.09%	-0.02%

Pathology

Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.0
2015	91	7.5
2020	84	7.0
2025	78	6.5
2030	72	6.1
Percent change 2006-2030	-29.6%	-28.5%
Annualized change 2006-2030	-1.45%	-1.39%

Psychiatry

Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	205	17.0
2015	198	16.4
2020	186	15.4
2025	174	14.5
2030	164	13.8
Percent change 2006-2030	-22.5%	-21.2%
Annualized change 2006-2030	-1.06%	-0.99%

Anesthesiology

Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	233	19.4
2015	232	19.3
2020	239	19.8
2025	241	20.1
2030	238	20.0
Percent change 2006-2030	4.7%	6.4%
Annualized change 2006-2030	0.19%	0.26%

Radiology

Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	218	18.1
2015	227	18.8
2020	231	19.2
2025	233	19.4
2030	233	19.6
Percent change 2006-2030	13.1%	14.9%
Annualized change 2006-2030	0.51%	0.58%

Emergency Medicine

Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	169	14.0
2015	189	15.6
2020	206	17.1
2025	220	18.3
2030	230	19.3
Percent change 2006-2030	48.1%	50.5%
Annualized change 2006-2030	1.65%	1.72%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	133	11.0
2015	138	11.5
2020	139	11.6
2025	141	11.7
2030	141	11.9
Percent change 2006-2030	10.1%	11.9%
Annualized change 2006-2030	0.40%	0.47%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	77	6.4
2020	72	6.0
2025	68	5.7
2030	64	5.4
Percent change 2006-2030	-22.9%	-21.7%
Annualized change 2006-2030	-1.08%	-1.01%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	43	3.6
2015	44	3.6
2020	42	3.5
2025	41	3.4
2030	39	3.3
Percent change 2006-2030	-11.6%	-10.2%
Annualized change 2006-2030	-0.51%	-0.44%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	135	11.2
2020	136	11.3
2025	137	11.4
2030	137	11.5
Percent change 2006-2030	5.1%	6.8%
Annualized change 2006-2030	0.21%	0.27%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.2
2020	36	3.0
2025	34	2.9
2030	33	2.7
Percent change 2006-2030	-22.6%	-21.3%
Annualized change 2006-2030	-1.06%	-0.99%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.2
2015	50	4.1
2020	47	3.9
2025	45	3.7
2030	43	3.6
Percent change 2006-2030	-18.1%	-16.8%
Annualized change 2006-2030	-0.83%	-0.76%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	381	31.6
2015	383	31.7
2020	378	31.3
2025	370	30.9
2030	361	30.4
Percent change 2006-2030	-3.0%	-1.4%
Annualized change 2006-2030	-0.13%	-0.06%

Finger Lakes Supply Scenario 2a: NP/PA High Growth (Supply Not Responsive to Demand)

Figure 153 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	4,048	335.7
2015	4,273	354.0
2020	4,442	368.5
2025	4,566	380.8
2030	4,670	393.7
Percent change 2006-2030	22.2%	24.1%
Annualized change 2006-2030	0.84%	0.90%

Figure 154 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,422	117.9	2010	2,626	217.8
2015	1,501	124.3	2015	2,772	229.7
2020	1,557	129.1	2020	2,886	239.3
2025	1,593	132.9	2025	2,973	247.9
2030	1,619	136.5	2030	3,051	257.2
Percent change 2006-2030	22.3%	24.2%	Percent change 2006-2030	22.1%	24.1%
Annualized change 2006-2030	0.84%	0.91%	Annualized change 2006-2030	0.84%	0.90%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 155 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,422	117.9	2010	347	28.8
2015	1,501	124.3	2015	367	30.4
2020	1,557	129.1	2020	378	31.3
2025	1,593	132.9	2025	381	31.8
2030	1,619	136.5	2030	380	32.0
Percent change 2006-2030	22.3%	24.2%	Percent change 2006-2030	15.7%	17.6%
Annualized change 2006-2030	0.84%	0.91%	Annualized change 2006-2030	0.61%	0.68%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	755	62.6	2010	319	26.4
2015	795	65.9	2015	339	28.1
2020	822	68.2	2020	357	29.6
2025	839	70.0	2025	373	31.1
2030	850	71.6	2030	390	32.8
Percent change 2006-2030	21.8%	23.7%	Percent change 2006-2030	30.7%	32.8%
Annualized change 2006-2030	0.82%	0.89%	Annualized change 2006-2030	1.12%	1.19%

Non-Primary Care Specialties

Figure 156 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	108	9.0
2015	119	9.8
2020	128	10.6
2025	135	11.3
2030	143	12.1
Percent change 2006-2030	40.4%	42.7%
Annualized change 2006-2030	1.42%	1.49%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	486	40.3
2015	545	45.1
2020	598	49.6
2025	644	53.7
2030	688	58.0
Percent change 2006-2030	54.0%	56.4%
Annualized change 2006-2030	1.81%	1.88%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	206	17.1
2015	215	17.8
2020	220	18.2
2025	222	18.5
2030	223	18.8
Percent change 2006-2030	12.7%	14.5%
Annualized change 2006-2030	0.50%	0.56%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	99	8.2
2015	95	7.9
2020	91	7.5
2025	87	7.2
2030	82	6.9
Percent change 2006-2030	-19.7%	-18.4%
Annualized change 2006-2030	-0.91%	-0.84%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	211	17.5
2015	211	17.4
2020	205	17.0
2025	198	16.5
2030	192	16.2
Percent change 2006-2030	-8.9%	-7.5%
Annualized change 2006-2030	-0.39%	-0.32%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	238	19.8
2015	244	20.2
2020	256	21.2
2025	264	22.0
2030	269	22.7
Percent change 2006-2030	18.5%	20.4%
Annualized change 2006-2030	0.71%	0.78%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	223	18.5
2015	238	19.7
2020	248	20.5
2025	256	21.3
2030	263	22.1
Percent change 2006-2030	27.5%	29.6%
Annualized change 2006-2030	1.02%	1.09%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	173	14.3
2015	198	16.4
2020	222	18.4
2025	243	20.3
2030	261	22.0
Percent change 2006-2030	68.6%	71.3%
Annualized change 2006-2030	2.20%	2.27%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	136	11.3
2015	145	12.0
2020	150	12.5
2025	156	13.0
2030	161	13.6
Percent change 2006-2030	25.7%	27.7%
Annualized change 2006-2030	0.96%	1.02%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	82	6.8
2015	80	6.6
2020	78	6.4
2025	75	6.2
2030	72	6.1
Percent change 2006-2030	-13.1%	-11.7%
Annualized change 2006-2030	-0.58%	-0.52%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	45	3.7
2015	46	3.8
2020	45	3.8
2025	45	3.8
2030	44	3.7
Percent change 2006-2030	0.7%	2.4%
Annualized change 2006-2030	0.03%	0.10%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	136	11.3
2015	142	11.7
2020	146	12.1
2025	150	12.5
2030	154	13.0
Percent change 2006-2030	18.3%	20.2%
Annualized change 2006-2030	0.70%	0.77%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	40	3.3
2020	39	3.2
2025	38	3.1
2030	37	3.1
Percent change 2006-2030	-12.9%	-11.5%
Annualized change 2006-2030	-0.57%	-0.51%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	52	4.3
2015	52	4.3
2020	51	4.2
2025	50	4.2
2030	48	4.1
Percent change 2006-2030	-6.9%	-5.4%
Annualized change 2006-2030	-0.30%	-0.23%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	390	32.3
2015	404	33.4
2020	409	34.0
2025	411	34.3
2030	414	34.9
Percent change 2006-2030	11.2%	13.0%
Annualized change 2006-2030	0.44%	0.51%

Finger Lakes Supply Scenario 2a: NP/PA High Growth (Supply Responsive to Demand)

Figure 157 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	4,017	333.1
2015	4,196	347.6
2020	4,318	358.1
2025	4,389	366.0
2030	4,422	372.7
Percent change 2006-2030	15.7%	17.5%
Annualized change 2006-2030	0.61%	0.68%

Figure 158 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,407	116.7	2010	2,610	216.4
2015	1,473	122.0	2015	2,724	225.6
2020	1,512	125.4	2020	2,805	232.7
2025	1,528	127.4	2025	2,861	238.6
2030	1,527	128.7	2030	2,894	244.0
Percent change 2006-2030	15.4%	17.2%	Percent change 2006-2030	15.8%	17.7%
Annualized change 2006-2030	0.60%	0.66%	Annualized change 2006-2030	0.61%	0.68%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 159 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,407	116.7	2010	346	28.7
2015	1,473	122.0	2015	364	30.1
2020	1,512	125.4	2020	372	30.9
2025	1,528	127.4	2025	373	31.1
2030	1,527	128.7	2030	368	31.0
Percent change 2006-2030	15.4%	17.2%	Percent change 2006-2030	12.1%	13.9%
Annualized change 2006-2030	0.60%	0.66%	Annualized change 2006-2030	0.48%	0.54%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	747	62.0	2010	314	26.0
2015	775	64.2	2015	334	27.6
2020	791	65.6	2020	349	28.9
2025	795	66.3	2025	360	30.0
2030	790	66.6	2030	370	31.2
Percent change 2006-2030	13.2%	15.0%	Percent change 2006-2030	24.1%	26.1%
Annualized change 2006-2030	0.52%	0.58%	Annualized change 2006-2030	0.90%	0.97%

Non-Primary Care Specialties

Figure 160 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	107	8.9
2015	117	9.7
2020	125	10.3
2025	130	10.9
2030	135	11.4
Percent change 2006-2030	32.7%	34.9%
Annualized change 2006-2030	1.19%	1.25%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	482	40.0
2015	534	44.2
2020	579	48.0
2025	615	51.3
2030	646	54.5
Percent change 2006-2030	44.6%	46.9%
Annualized change 2006-2030	1.55%	1.62%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	206	17.0
2015	211	17.5
2020	213	17.6
2025	212	17.7
2030	210	17.7
Percent change 2006-2030	6.3%	8.0%
Annualized change 2006-2030	0.25%	0.32%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	98	8.2
2015	94	7.8
2020	88	7.3
2025	84	7.0
2030	78	6.6
Percent change 2006-2030	-23.6%	-22.3%
Annualized change 2006-2030	-1.11%	-1.05%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	208	17.3
2015	204	16.9
2020	195	16.2
2025	186	15.5
2030	178	15.0
Percent change 2006-2030	-15.8%	-14.5%
Annualized change 2006-2030	-0.72%	-0.65%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	237	19.7
2015	240	19.9
2020	251	20.8
2025	257	21.5
2030	258	21.8
Percent change 2006-2030	13.7%	15.5%
Annualized change 2006-2030	0.53%	0.60%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	222	18.4
2015	234	19.4
2020	243	20.1
2025	249	20.8
2030	253	21.3
Percent change 2006-2030	22.8%	24.8%
Annualized change 2006-2030	0.86%	0.93%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	172	14.2
2015	195	16.2
2020	217	18.0
2025	235	19.6
2030	249	21.0
Percent change 2006-2030	60.8%	63.4%
Annualized change 2006-2030	2.00%	2.07%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	135	11.2
2015	143	11.8
2020	147	12.2
2025	150	12.5
2030	153	12.9
Percent change 2006-2030	19.5%	21.5%
Annualized change 2006-2030	0.75%	0.81%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	82	6.8
2015	80	6.6
2020	76	6.3
2025	73	6.1
2030	69	5.9
Percent change 2006-2030	-16.3%	-15.0%
Annualized change 2006-2030	-0.74%	-0.67%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.7
2015	45	3.7
2020	44	3.6
2025	44	3.6
2030	42	3.6
Percent change 2006-2030	-4.0%	-2.4%
Annualized change 2006-2030	-0.17%	-0.10%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	136	11.3
2015	139	11.6
2020	143	11.9
2025	146	12.2
2030	148	12.5
Percent change 2006-2030	14.1%	15.9%
Annualized change 2006-2030	0.55%	0.62%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	40	3.3
2020	38	3.1
2025	37	3.1
2030	35	3.0
Percent change 2006-2030	-15.9%	-14.6%
Annualized change 2006-2030	-0.72%	-0.65%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	52	4.3
2015	51	4.2
2020	50	4.1
2025	48	4.0
2030	46	3.9
Percent change 2006-2030	-11.1%	-9.6%
Annualized change 2006-2030	-0.49%	-0.42%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	387	32.1
2015	396	32.8
2020	397	32.9
2025	395	33.0
2030	392	33.0
Percent change 2006-2030	5.3%	7.0%
Annualized change 2006-2030	0.22%	0.28%

Finger Lakes Supply Scenario 2b: NP/PA Lower Growth (Supply Not Responsive to Demand)

Figure 161 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	4,026	333.8
2015	4,195	347.5
2020	4,308	357.3
2025	4,375	364.9
2030	4,424	372.9
Percent change 2006-2030	15.7%	17.6%
Annualized change 2006-2030	0.61%	0.68%

Figure 162 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,411	117.0	2010	2,615	216.8
2015	1,463	121.2	2015	2,732	226.3
2020	1,492	123.7	2020	2,816	233.6
2025	1,500	125.1	2025	2,875	239.7
2030	1,499	126.4	2030	2,925	246.6
Percent change 2006-2030	13.2%	15.0%	Percent change 2006-2030	17.0%	18.9%
Annualized change 2006-2030	0.52%	0.59%	Annualized change 2006-2030	0.66%	0.73%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 163 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,411	117.0	2010	345	28.6
2015	1,463	121.2	2015	357	29.6
2020	1,492	123.7	2020	362	30.0
2025	1,500	125.1	2025	359	30.0
2030	1,499	126.4	2030	351	29.6
Percent change 2006-2030	13.2%	15.0%	Percent change 2006-2030	7.1%	8.9%
Annualized change 2006-2030	0.52%	0.59%	Annualized change 2006-2030	0.29%	0.35%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	750	62.2	2010	316	26.2
2015	775	64.2	2015	330	27.4
2020	788	65.3	2020	342	28.4
2025	790	65.9	2025	351	29.3
2030	787	66.3	2030	361	30.4
Percent change 2006-2030	12.7%	14.6%	Percent change 2006-2030	21.0%	23.0%
Annualized change 2006-2030	0.50%	0.57%	Annualized change 2006-2030	0.80%	0.87%

Non-Primary Care Specialties

Figure 164 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	108	8.9
2015	117	9.7
2020	125	10.3
2025	131	10.9
2030	137	11.6
Percent change 2006-2030	34.6%	36.8%
Annualized change 2006-2030	1.25%	1.31%

Obstetrics and Gynecology

Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	206	17.0
2015	212	17.6
2020	214	17.8
2025	215	17.9
2030	214	18.0
Percent change 2006-2030	8.0%	9.7%
Annualized change 2006-2030	0.32%	0.39%

Psychiatry

Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	210	17.4
2015	208	17.2
2020	200	16.6
2025	191	15.9
2030	184	15.5
Percent change 2006-2030	-12.7%	-11.3%
Annualized change 2006-2030	-0.56%	-0.50%

Radiology

Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	222	18.4
2015	234	19.4
2020	242	20.0
2025	247	20.6
2030	252	21.2
Percent change 2006-2030	22.2%	24.2%
Annualized change 2006-2030	0.84%	0.91%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	136	11.2
2015	143	11.8
2020	147	12.2
2025	151	12.6
2030	154	13.0
Percent change 2006-2030	20.5%	22.4%
Annualized change 2006-2030	0.78%	0.85%

Other Internal Medicine Subspecialties

Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	484	40.1
2015	537	44.5
2020	583	48.4
2025	622	51.9
2030	660	55.6
Percent change 2006-2030	47.6%	50.0%
Annualized change 2006-2030	1.63%	1.70%

Pathology

Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	98	8.1
2015	94	7.7
2020	89	7.4
2025	84	7.0
2030	79	6.6
Percent change 2006-2030	-23.0%	-21.7%
Annualized change 2006-2030	-1.08%	-1.02%

Anesthesiology

Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	237	19.7
2015	240	19.9
2020	250	20.7
2025	256	21.3
2030	258	21.7
Percent change 2006-2030	13.6%	15.4%
Annualized change 2006-2030	0.53%	0.60%

Emergency Medicine

Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	172	14.3
2015	196	16.2
2020	216	18.0
2025	235	19.6
2030	250	21.1
Percent change 2006-2030	61.6%	64.2%
Annualized change 2006-2030	2.02%	2.09%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	82	6.8
2015	79	6.5
2020	76	6.3
2025	72	6.0
2030	69	5.8
Percent change 2006-2030	-16.7%	-15.3%
Annualized change 2006-2030	-0.76%	-0.69%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.7
2015	45	3.7
2020	44	3.7
2025	44	3.7
2030	42	3.6
Percent change 2006-2030	-3.4%	-1.9%
Annualized change 2006-2030	-0.15%	-0.08%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	136	11.3
2015	140	11.6
2020	143	11.8
2025	145	12.1
2030	147	12.4
Percent change 2006-2030	13.4%	15.3%
Annualized change 2006-2030	0.53%	0.59%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	40	3.3
2020	38	3.1
2025	36	3.0
2030	35	3.0
Percent change 2006-2030	-16.5%	-15.2%
Annualized change 2006-2030	-0.75%	-0.68%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	52	4.3
2015	51	4.2
2020	50	4.1
2025	48	4.0
2030	46	3.9
Percent change 2006-2030	-10.8%	-9.3%
Annualized change 2006-2030	-0.47%	-0.41%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	388	32.2
2015	398	33.0
2020	400	33.2
2025	398	33.2
2030	397	33.4
Percent change 2006-2030	6.6%	8.3%
Annualized change 2006-2030	0.27%	0.33%

Finger Lakes Supply Scenario 2b: NP/PA Lower Growth (Supply Responsive to Demand)

Figure 165 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,995	331.2
2015	4,119	341.3
2020	4,187	347.3
2025	4,206	350.7
2030	4,188	353.1
Percent change 2006-2030	9.6%	11.3%
Annualized change 2006-2030	0.38%	0.45%

Figure 166 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,396	115.8	2010	2,598	215.5
2015	1,435	118.9	2015	2,684	222.4
2020	1,449	120.2	2020	2,738	227.1
2025	1,439	120.0	2025	2,767	230.7
2030	1,414	119.2	2030	2,774	233.9
Percent change 2006-2030	6.8%	8.5%	Percent change 2006-2030	11.0%	12.8%
Annualized change 2006-2030	0.27%	0.34%	Annualized change 2006-2030	0.44%	0.50%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 167 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,396	115.8	2010	343	28.4
2015	1,435	118.9	2015	354	29.4
2020	1,449	120.2	2020	356	29.6
2025	1,439	120.0	2025	351	29.3
2030	1,414	119.2	2030	340	28.7
Percent change 2006-2030	6.8%	8.5%	Percent change 2006-2030	3.8%	5.4%
Annualized change 2006-2030	0.27%	0.34%	Annualized change 2006-2030	0.15%	0.22%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	742	61.5	2010	312	25.8
2015	756	62.6	2015	325	26.9
2020	758	62.9	2020	334	27.7
2025	748	62.4	2025	339	28.3
2030	731	61.7	2030	343	28.9
Percent change 2006-2030	4.8%	6.5%	Percent change 2006-2030	14.9%	16.8%
Annualized change 2006-2030	0.19%	0.26%	Annualized change 2006-2030	0.58%	0.65%

Non-Primary Care Specialties

Figure 168 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	107	8.8
2015	115	9.5
2020	122	10.1
2025	126	10.5
2030	130	10.9
Percent change 2006-2030	27.2%	29.3%
Annualized change 2006-2030	1.01%	1.08%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	480	39.8
2015	526	43.6
2020	565	46.9
2025	595	49.6
2030	620	52.2
Percent change 2006-2030	38.6%	40.8%
Annualized change 2006-2030	1.37%	1.44%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	205	17.0
2015	208	17.2
2020	208	17.2
2025	205	17.1
2030	202	17.0
Percent change 2006-2030	1.9%	3.5%
Annualized change 2006-2030	0.08%	0.14%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	98	8.1
2015	92	7.7
2020	86	7.2
2025	81	6.7
2030	75	6.3
Percent change 2006-2030	-26.8%	-25.6%
Annualized change 2006-2030	-1.29%	-1.22%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	208	17.2
2015	201	16.7
2020	191	15.8
2025	180	15.0
2030	170	14.3
Percent change 2006-2030	-19.3%	-18.0%
Annualized change 2006-2030	-0.89%	-0.82%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	236	19.6
2015	237	19.6
2020	245	20.3
2025	249	20.8
2030	247	20.8
Percent change 2006-2030	8.9%	10.7%
Annualized change 2006-2030	0.36%	0.42%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	221	18.3
2015	231	19.1
2020	237	19.7
2025	241	20.1
2030	242	20.4
Percent change 2006-2030	17.7%	19.6%
Annualized change 2006-2030	0.68%	0.75%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	171	14.2
2015	192	15.9
2020	212	17.6
2025	227	18.9
2030	239	20.1
Percent change 2006-2030	54.1%	56.6%
Annualized change 2006-2030	1.82%	1.89%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	135	11.2
2015	141	11.7
2020	143	11.9
2025	145	12.1
2030	147	12.4
Percent change 2006-2030	14.6%	16.4%
Annualized change 2006-2030	0.57%	0.64%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	82	6.8
2015	78	6.5
2020	74	6.2
2025	70	5.9
2030	67	5.6
Percent change 2006-2030	-19.8%	-18.5%
Annualized change 2006-2030	-0.91%	-0.85%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.6
2015	45	3.7
2020	43	3.5
2025	42	3.5
2030	40	3.4
Percent change 2006-2030	-8.0%	-6.5%
Annualized change 2006-2030	-0.35%	-0.28%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	136	11.2
2015	137	11.4
2020	140	11.6
2025	141	11.8
2030	142	12.0
Percent change 2006-2030	9.4%	11.1%
Annualized change 2006-2030	0.37%	0.44%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	40	3.3
2020	37	3.1
2025	36	3.0
2030	34	2.9
Percent change 2006-2030	-19.4%	-18.1%
Annualized change 2006-2030	-0.90%	-0.83%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	52	4.3
2015	51	4.2
2020	49	4.0
2025	46	3.9
2030	44	3.7
Percent change 2006-2030	-14.8%	-13.4%
Annualized change 2006-2030	-0.66%	-0.60%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	385	32.0
2015	390	32.3
2020	388	32.1
2025	382	31.9
2030	376	31.7
Percent change 2006-2030	1.0%	2.6%
Annualized change 2006-2030	0.04%	0.11%

Finger Lakes Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 169 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,979	329.9
2015	4,137	342.7
2020	4,243	351.9
2025	4,302	358.8
2030	4,331	365.1
Percent change 2006-2030	13.3%	15.1%
Annualized change 2006-2030	0.52%	0.59%

Figure 170 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,382	114.6	2010	2,597	215.3
2015	1,421	117.7	2015	2,716	225.0
2020	1,438	119.3	2020	2,805	232.7
2025	1,434	119.6	2025	2,868	239.2
2030	1,416	119.4	2030	2,914	245.7
Percent change 2006-2030	7.0%	8.7%	Percent change 2006-2030	16.6%	18.5%
Annualized change 2006-2030	0.28%	0.35%	Annualized change 2006-2030	0.64%	0.71%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 171– Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,382	114.6	2010	338	28.0
2015	1,421	117.7	2015	347	28.8
2020	1,438	119.3	2020	349	28.9
2025	1,434	119.6	2025	343	28.6
2030	1,416	119.4	2030	332	28.0
Percent change 2006-2030	7.0%	8.7%	Percent change 2006-2030	1.2%	2.9%
Annualized change 2006-2030	0.28%	0.35%	Annualized change 2006-2030	0.05%	0.12%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	734	60.9	2010	310	25.7
2015	753	62.4	2015	321	26.6
2020	759	63.0	2020	330	27.3
2025	755	63.0	2025	336	28.0
2030	744	62.7	2030	341	28.7
Percent change 2006-2030	6.5%	8.2%	Percent change 2006-2030	14.4%	16.2%
Annualized change 2006-2030	0.26%	0.33%	Annualized change 2006-2030	0.56%	0.63%

Non-Primary Care Specialties

Figure 172 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	107	8.9
2015	116	9.6
2020	124	10.3
2025	131	10.9
2030	137	11.5
Percent change 2006-2030	34.1%	36.3%
Annualized change 2006-2030	1.23%	1.30%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	480	39.8
2015	534	44.2
2020	581	48.2
2025	621	51.8
2030	657	55.4
Percent change 2006-2030	47.0%	49.4%
Annualized change 2006-2030	1.62%	1.69%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	204	16.9
2015	211	17.4
2020	214	17.7
2025	214	17.9
2030	213	18.0
Percent change 2006-2030	7.6%	9.3%
Annualized change 2006-2030	0.31%	0.37%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.1
2015	93	7.7
2020	88	7.3
2025	84	7.0
2030	78	6.6
Percent change 2006-2030	-23.3%	-22.0%
Annualized change 2006-2030	-1.10%	-1.03%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	209	17.3
2015	206	17.1
2020	199	16.5
2025	191	15.9
2030	184	15.5
Percent change 2006-2030	-13.0%	-11.6%
Annualized change 2006-2030	-0.58%	-0.51%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	236	19.5
2015	239	19.8
2020	249	20.6
2025	255	21.3
2030	257	21.7
Percent change 2006-2030	13.2%	15.0%
Annualized change 2006-2030	0.52%	0.58%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	220	18.3
2015	233	19.3
2020	241	20.0
2025	246	20.6
2030	251	21.1
Percent change 2006-2030	21.8%	23.8%
Annualized change 2006-2030	0.82%	0.89%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	171	14.2
2015	194	16.1
2020	216	17.9
2025	234	19.5
2030	250	21.0
Percent change 2006-2030	61.0%	63.6%
Annualized change 2006-2030	2.00%	2.07%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	135	11.2
2015	142	11.8
2020	146	12.1
2025	150	12.5
2030	154	13.0
Percent change 2006-2030	20.0%	22.0%
Annualized change 2006-2030	0.76%	0.83%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	78	6.5
2020	76	6.3
2025	72	6.0
2030	69	5.8
Percent change 2006-2030	-17.0%	-15.7%
Annualized change 2006-2030	-0.77%	-0.71%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.7
2015	45	3.7
2020	44	3.7
2025	44	3.6
2030	42	3.6
Percent change 2006-2030	-3.8%	-2.2%
Annualized change 2006-2030	-0.16%	-0.09%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	135	11.2
2015	139	11.5
2020	142	11.8
2025	145	12.1
2030	147	12.4
Percent change 2006-2030	13.0%	14.8%
Annualized change 2006-2030	0.51%	0.58%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.3
2020	38	3.1
2025	36	3.0
2030	35	2.9
Percent change 2006-2030	-16.8%	-15.5%
Annualized change 2006-2030	-0.77%	-0.70%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	52	4.3
2015	51	4.2
2020	50	4.1
2025	48	4.0
2030	46	3.9
Percent change 2006-2030	-11.1%	-9.6%
Annualized change 2006-2030	-0.49%	-0.42%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	385	31.9
2015	395	32.8
2020	398	33.0
2025	397	33.1
2030	395	33.3
Percent change 2006-2030	6.2%	7.9%
Annualized change 2006-2030	0.25%	0.32%

Finger Lakes Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 173 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,942	326.9
2015	4,049	335.4
2020	4,102	340.2
2025	4,107	342.5
2030	4,070	343.1
Percent change 2006-2030	6.5%	8.2%
Annualized change 2006-2030	0.26%	0.33%

Figure 174 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,369	113.5	2010	2,573	213.3
2015	1,395	115.6	2015	2,654	219.9
2020	1,398	115.9	2020	2,704	224.3
2025	1,378	114.9	2025	2,730	227.7
2030	1,340	113.0	2030	2,730	230.1
Percent change 2006-2030	1.2%	2.9%	Percent change 2006-2030	9.2%	11.0%
Annualized change 2006-2030	0.05%	0.12%	Annualized change 2006-2030	0.37%	0.44%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 175– Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,369	113.5	2010	336	27.9
2015	1,395	115.6	2015	345	28.5
2020	1,398	115.9	2020	344	28.5
2025	1,378	114.9	2025	336	28.1
2030	1,340	113.0	2030	323	27.2
Percent change 2006-2030	1.2%	2.9%	Percent change 2006-2030	-1.7%	-0.1%
Annualized change 2006-2030	0.05%	0.12%	Annualized change 2006-2030	-0.07%	0.00%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	727	60.3	2010	306	25.3
2015	734	60.8	2015	316	26.2
2020	731	60.7	2020	322	26.7
2025	717	59.8	2025	325	27.1
2030	693	58.4	2030	325	27.4
Percent change 2006-2030	-0.7%	0.9%	Percent change 2006-2030	8.9%	10.7%
Annualized change 2006-2030	-0.03%	0.04%	Annualized change 2006-2030	0.36%	0.42%

Non-Primary Care Specialties

Figure 176 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	106	8.8
2015	114	9.4
2020	120	10.0
2025	124	10.4
2030	128	10.8
Percent change 2006-2030	25.2%	27.2%
Annualized change 2006-2030	0.94%	1.01%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	476	39.4
2015	520	43.1
2020	558	46.3
2025	587	48.9
2030	610	51.4
Percent change 2006-2030	36.4%	38.6%
Annualized change 2006-2030	1.30%	1.37%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	203	16.8
2015	205	17.0
2020	205	17.0
2025	202	16.9
2030	198	16.7
Percent change 2006-2030	0.2%	1.8%
Annualized change 2006-2030	0.01%	0.08%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.0
2015	91	7.6
2020	85	7.1
2025	80	6.7
2030	74	6.2
Percent change 2006-2030	-27.9%	-26.8%
Annualized change 2006-2030	-1.36%	-1.29%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	205	17.0
2015	199	16.5
2020	188	15.6
2025	177	14.8
2030	167	14.1
Percent change 2006-2030	-20.6%	-19.3%
Annualized change 2006-2030	-0.96%	-0.89%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	234	19.4
2015	234	19.4
2020	242	20.1
2025	246	20.5
2030	243	20.5
Percent change 2006-2030	7.2%	8.9%
Annualized change 2006-2030	0.29%	0.36%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	218	18.1
2015	228	18.9
2020	234	19.4
2025	238	19.8
2030	239	20.1
Percent change 2006-2030	15.8%	17.7%
Annualized change 2006-2030	0.61%	0.68%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	169	14.0
2015	190	15.7
2020	209	17.3
2025	224	18.7
2030	235	19.8
Percent change 2006-2030	51.6%	54.1%
Annualized change 2006-2030	1.75%	1.82%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	133	11.0
2015	139	11.5
2020	141	11.7
2025	144	12.0
2030	144	12.2
Percent change 2006-2030	12.7%	14.6%
Annualized change 2006-2030	0.50%	0.57%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	78	6.4
2020	73	6.1
2025	69	5.8
2030	66	5.5
Percent change 2006-2030	-21.1%	-19.8%
Annualized change 2006-2030	-0.98%	-0.92%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	43	3.6
2015	44	3.6
2020	42	3.5
2025	42	3.5
2030	40	3.4
Percent change 2006-2030	-9.5%	-8.0%
Annualized change 2006-2030	-0.41%	-0.35%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	136	11.3
2020	138	11.5
2025	139	11.6
2030	140	11.8
Percent change 2006-2030	7.6%	9.3%
Annualized change 2006-2030	0.31%	0.37%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.2
2020	37	3.0
2025	35	2.9
2030	33	2.8
Percent change 2006-2030	-20.7%	-19.4%
Annualized change 2006-2030	-0.96%	-0.90%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.2
2015	50	4.1
2020	48	4.0
2025	46	3.8
2030	44	3.7
Percent change 2006-2030	-16.1%	-14.8%
Annualized change 2006-2030	-0.73%	-0.66%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	382	31.6
2015	386	32.0
2020	383	31.7
2025	377	31.4
2030	370	31.2
Percent change 2006-2030	-0.7%	1.0%
Annualized change 2006-2030	-0.03%	0.04%

Finger Lakes Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 177 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,979	329.9
2015	4,137	342.7
2020	4,243	351.9
2025	4,302	358.8
2030	4,331	365.1
Percent change 2006-2030	13.3%	15.1%
Annualized change 2006-2030	0.52%	0.59%

Figure 178 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,382	114.6	2010	2,597	215.3
2015	1,419	117.5	2015	2,718	225.2
2020	1,433	118.9	2020	2,810	233.1
2025	1,428	119.1	2025	2,874	239.7
2030	1,408	118.7	2030	2,923	246.4
Percent change 2006-2030	6.3%	8.1%	Percent change 2006-2030	17.0%	18.8%
Annualized change 2006-2030	0.26%	0.32%	Annualized change 2006-2030	0.65%	0.72%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 179– Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,382	114.6	2010	337	28.0
2015	1,419	117.5	2015	347	28.7
2020	1,433	118.9	2020	348	28.8
2025	1,428	119.1	2025	342	28.5
2030	1,408	118.7	2030	330	27.8
Percent change 2006-2030	6.3%	8.1%	Percent change 2006-2030	0.6%	2.3%
Annualized change 2006-2030	0.26%	0.32%	Annualized change 2006-2030	0.03%	0.09%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	734	60.9	2010	310	25.7
2015	751	62.2	2015	321	26.6
2020	757	62.8	2020	329	27.2
2025	752	62.7	2025	334	27.9
2030	739	62.3	2030	339	28.6
Percent change 2006-2030	5.9%	7.6%	Percent change 2006-2030	13.7%	15.5%
Annualized change 2006-2030	0.24%	0.31%	Annualized change 2006-2030	0.54%	0.60%

Non-Primary Care Specialties

Figure 180 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	107	8.9
2015	116	9.7
2020	124	10.3
2025	131	10.9
2030	137	11.6
Percent change 2006-2030	34.5%	36.7%
Annualized change 2006-2030	1.24%	1.31%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	480	39.8
2015	534	44.3
2020	582	48.3
2025	622	51.9
2030	659	55.6
Percent change 2006-2030	47.5%	49.8%
Annualized change 2006-2030	1.63%	1.70%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	204	16.9
2015	211	17.5
2020	214	17.7
2025	215	17.9
2030	214	18.0
Percent change 2006-2030	7.9%	9.6%
Annualized change 2006-2030	0.32%	0.38%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.1
2015	93	7.7
2020	89	7.3
2025	84	7.0
2030	78	6.6
Percent change 2006-2030	-23.0%	-21.8%
Annualized change 2006-2030	-1.09%	-1.02%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	209	17.3
2015	207	17.1
2020	199	16.5
2025	191	15.9
2030	184	15.5
Percent change 2006-2030	-12.8%	-11.4%
Annualized change 2006-2030	-0.57%	-0.50%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	236	19.5
2015	239	19.8
2020	249	20.7
2025	256	21.3
2030	258	21.7
Percent change 2006-2030	13.5%	15.3%
Annualized change 2006-2030	0.53%	0.60%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	221	18.3
2015	233	19.3
2020	241	20.0
2025	247	20.6
2030	252	21.2
Percent change 2006-2030	22.1%	24.1%
Annualized change 2006-2030	0.84%	0.90%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	171	14.2
2015	195	16.1
2020	216	17.9
2025	235	19.6
2030	250	21.1
Percent change 2006-2030	61.4%	64.1%
Annualized change 2006-2030	2.02%	2.08%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	135	11.2
2015	142	11.8
2020	146	12.1
2025	151	12.6
2030	154	13.0
Percent change 2006-2030	20.4%	22.3%
Annualized change 2006-2030	0.78%	0.84%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	79	6.5
2020	76	6.3
2025	72	6.0
2030	69	5.8
Percent change 2006-2030	-16.8%	-15.4%
Annualized change 2006-2030	-0.76%	-0.69%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.7
2015	45	3.7
2020	44	3.7
2025	44	3.7
2030	42	3.6
Percent change 2006-2030	-3.5%	-2.0%
Annualized change 2006-2030	-0.15%	-0.08%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	135	11.2
2015	139	11.5
2020	142	11.8
2025	145	12.1
2030	147	12.4
Percent change 2006-2030	13.3%	15.2%
Annualized change 2006-2030	0.52%	0.59%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.3
2020	38	3.1
2025	36	3.0
2030	35	3.0
Percent change 2006-2030	-16.6%	-15.2%
Annualized change 2006-2030	-0.75%	-0.69%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	52	4.3
2015	51	4.2
2020	50	4.1
2025	48	4.0
2030	46	3.9
Percent change 2006-2030	-10.8%	-9.4%
Annualized change 2006-2030	-0.48%	-0.41%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	385	31.9
2015	396	32.8
2020	399	33.1
2025	398	33.2
2030	396	33.4
Percent change 2006-2030	6.5%	8.2%
Annualized change 2006-2030	0.26%	0.33%

Finger Lakes Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 181 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,942	326.9
2015	4,049	335.4
2020	4,102	340.2
2025	4,107	342.5
2030	4,070	343.1
Percent change 2006-2030	6.5%	8.2%
Annualized change 2006-2030	0.26%	0.33%

Figure 182 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,369	113.5	2010	2,573	213.4
2015	1,393	115.4	2015	2,656	220.1
2020	1,393	115.6	2020	2,709	224.7
2025	1,371	114.4	2025	2,736	228.2
2030	1,332	112.3	2030	2,738	230.8
Percent change 2006-2030	0.6%	2.3%	Percent change 2006-2030	9.5%	11.3%
Annualized change 2006-2030	0.03%	0.09%	Annualized change 2006-2030	0.38%	0.45%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 183– Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,369	113.5	2010	336	27.9
2015	1,393	115.4	2015	344	28.5
2020	1,393	115.6	2020	343	28.4
2025	1,371	114.4	2025	335	27.9
2030	1,332	112.3	2030	321	27.0
Percent change 2006-2030	0.6%	2.3%	Percent change 2006-2030	-2.2%	-0.7%
Annualized change 2006-2030	0.03%	0.09%	Annualized change 2006-2030	-0.09%	-0.03%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	727	60.3	2010	306	25.3
2015	733	60.7	2015	315	26.1
2020	729	60.5	2020	321	26.7
2025	713	59.5	2025	323	27.0
2030	689	58.1	2030	323	27.2
Percent change 2006-2030	-1.3%	0.3%	Percent change 2006-2030	8.3%	10.0%
Annualized change 2006-2030	-0.05%	0.01%	Annualized change 2006-2030	0.33%	0.40%

Non-Primary Care Specialties

Figure 184 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	106	8.8
2015	114	9.4
2020	120	10.0
2025	125	10.4
2030	128	10.8
Percent change 2006-2030	25.5%	27.6%
Annualized change 2006-2030	0.95%	1.02%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	476	39.4
2015	521	43.1
2020	559	46.4
2025	588	49.1
2030	611	51.5
Percent change 2006-2030	36.8%	39.0%
Annualized change 2006-2030	1.31%	1.38%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	203	16.8
2015	205	17.0
2020	205	17.0
2025	203	16.9
2030	199	16.8
Percent change 2006-2030	0.5%	2.1%
Annualized change 2006-2030	0.02%	0.09%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.0
2015	91	7.6
2020	85	7.1
2025	80	6.7
2030	74	6.2
Percent change 2006-2030	-27.7%	-26.6%
Annualized change 2006-2030	-1.34%	-1.28%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	206	17.0
2015	199	16.5
2020	188	15.6
2025	178	14.8
2030	168	14.2
Percent change 2006-2030	-20.4%	-19.1%
Annualized change 2006-2030	-0.95%	-0.88%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	234	19.4
2015	234	19.4
2020	243	20.1
2025	246	20.5
2030	244	20.6
Percent change 2006-2030	7.5%	9.2%
Annualized change 2006-2030	0.30%	0.37%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	218	18.1
2015	228	18.9
2020	234	19.4
2025	238	19.9
2030	239	20.2
Percent change 2006-2030	16.1%	18.0%
Annualized change 2006-2030	0.63%	0.69%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	169	14.0
2015	190	15.8
2020	209	17.4
2025	225	18.7
2030	236	19.9
Percent change 2006-2030	52.1%	54.5%
Annualized change 2006-2030	1.76%	1.83%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	133	11.0
2015	139	11.6
2020	142	11.7
2025	144	12.0
2030	145	12.2
Percent change 2006-2030	13.1%	14.9%
Annualized change 2006-2030	0.51%	0.58%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	78	6.4
2020	74	6.1
2025	69	5.8
2030	66	5.5
Percent change 2006-2030	-20.8%	-19.6%
Annualized change 2006-2030	-0.97%	-0.90%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.6
2015	44	3.6
2020	42	3.5
2025	42	3.5
2030	40	3.4
Percent change 2006-2030	-9.2%	-7.7%
Annualized change 2006-2030	-0.40%	-0.33%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	136	11.3
2020	138	11.5
2025	140	11.7
2030	140	11.8
Percent change 2006-2030	7.9%	9.7%
Annualized change 2006-2030	0.32%	0.38%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.3
2020	37	3.0
2025	35	2.9
2030	33	2.8
Percent change 2006-2030	-20.5%	-19.2%
Annualized change 2006-2030	-0.95%	-0.88%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.2
2015	50	4.1
2020	48	4.0
2025	46	3.8
2030	44	3.7
Percent change 2006-2030	-15.9%	-14.5%
Annualized change 2006-2030	-0.72%	-0.65%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	382	31.6
2015	386	32.0
2020	383	31.8
2025	378	31.5
2030	371	31.2
Percent change 2006-2030	-0.4%	1.2%
Annualized change 2006-2030	-0.02%	0.05%

Finger Lakes Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 185 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,979	329.9
2015	4,137	342.7
2020	4,243	351.9
2025	4,302	358.8
2030	4,331	365.1
Percent change 2006-2030	13.3%	15.1%
Annualized change 2006-2030	0.52%	0.59%

Figure 186 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,381	114.5	2010	2,597	215.4
2015	1,417	117.4	2015	2,720	225.3
2020	1,430	118.6	2020	2,812	233.3
2025	1,424	118.7	2025	2,878	240.1
2030	1,403	118.3	2030	2,928	246.8
Percent change 2006-2030	6.0%	7.7%	Percent change 2006-2030	17.2%	19.0%
Annualized change 2006-2030	0.24%	0.31%	Annualized change 2006-2030	0.66%	0.73%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 187 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,381	114.5	2010	337	28.0
2015	1,417	117.4	2015	346	28.7
2020	1,430	118.6	2020	347	28.8
2025	1,424	118.7	2025	341	28.4
2030	1,403	118.3	2030	329	27.7
Percent change 2006-2030	6.0%	7.7%	Percent change 2006-2030	0.3%	1.9%
Annualized change 2006-2030	0.24%	0.31%	Annualized change 2006-2030	0.01%	0.08%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	734	60.9	2010	310	25.7
2015	751	62.2	2015	320	26.5
2020	755	62.7	2020	328	27.2
2025	750	62.5	2025	333	27.8
2030	736	62.1	2030	338	28.5
Percent change 2006-2030	5.5%	7.2%	Percent change 2006-2030	13.3%	15.1%
Annualized change 2006-2030	0.22%	0.29%	Annualized change 2006-2030	0.52%	0.59%

Non-Primary Care Specialties

Figure 188 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	107	8.9
2015	117	9.7
2020	125	10.3
2025	131	10.9
2030	137	11.6
Percent change 2006-2030	34.7%	36.9%
Annualized change 2006-2030	1.25%	1.32%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	480	39.8
2015	534	44.3
2020	583	48.3
2025	623	52.0
2030	660	55.7
Percent change 2006-2030	47.7%	50.1%
Annualized change 2006-2030	1.64%	1.71%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	204	16.9
2015	211	17.5
2020	214	17.8
2025	215	17.9
2030	214	18.0
Percent change 2006-2030	8.1%	9.8%
Annualized change 2006-2030	0.32%	0.39%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.1
2015	93	7.7
2020	89	7.4
2025	84	7.0
2030	79	6.6
Percent change 2006-2030	-22.9%	-21.7%
Annualized change 2006-2030	-1.08%	-1.01%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	209	17.3
2015	207	17.1
2020	199	16.5
2025	191	16.0
2030	184	15.5
Percent change 2006-2030	-12.6%	-11.2%
Annualized change 2006-2030	-0.56%	-0.49%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	236	19.5
2015	239	19.8
2020	250	20.7
2025	256	21.3
2030	258	21.8
Percent change 2006-2030	13.7%	15.5%
Annualized change 2006-2030	0.54%	0.60%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	221	18.3
2015	233	19.3
2020	241	20.0
2025	247	20.6
2030	252	21.2
Percent change 2006-2030	22.3%	24.3%
Annualized change 2006-2030	0.84%	0.91%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	171	14.2
2015	195	16.1
2020	216	17.9
2025	235	19.6
2030	251	21.1
Percent change 2006-2030	61.7%	64.3%
Annualized change 2006-2030	2.02%	2.09%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	135	11.2
2015	142	11.8
2020	147	12.2
2025	151	12.6
2030	154	13.0
Percent change 2006-2030	20.6%	22.5%
Annualized change 2006-2030	0.78%	0.85%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	79	6.5
2020	76	6.3
2025	72	6.0
2030	69	5.8
Percent change 2006-2030	-16.6%	-15.3%
Annualized change 2006-2030	-0.75%	-0.69%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.7
2015	45	3.7
2020	44	3.7
2025	44	3.7
2030	43	3.6
Percent change 2006-2030	-3.4%	-1.8%
Annualized change 2006-2030	-0.14%	-0.08%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	135	11.2
2015	139	11.5
2020	143	11.8
2025	145	12.1
2030	148	12.4
Percent change 2006-2030	13.5%	15.4%
Annualized change 2006-2030	0.53%	0.60%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.3
2020	38	3.1
2025	37	3.0
2030	35	3.0
Percent change 2006-2030	-16.4%	-15.1%
Annualized change 2006-2030	-0.75%	-0.68%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	52	4.3
2015	51	4.2
2020	50	4.1
2025	48	4.0
2030	46	3.9
Percent change 2006-2030	-10.7%	-9.2%
Annualized change 2006-2030	-0.47%	-0.40%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	385	31.9
2015	396	32.8
2020	399	33.1
2025	398	33.2
2030	397	33.5
Percent change 2006-2030	6.7%	8.4%
Annualized change 2006-2030	0.27%	0.34%

Finger Lakes Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 189 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,942	326.9
2015	4,049	335.4
2020	4,102	340.2
2025	4,107	342.5
2030	4,070	343.1
Percent change 2006-2030	6.5%	8.2%
Annualized change 2006-2030	0.26%	0.33%

Figure 190 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,368	113.5	2010	2,573	213.4
2015	1,391	115.3	2015	2,658	220.2
2020	1,391	115.4	2020	2,711	224.9
2025	1,368	114.0	2025	2,740	228.5
2030	1,328	111.9	2030	2,742	231.2
Percent change 2006-2030	0.3%	1.9%	Percent change 2006-2030	9.7%	11.5%
Annualized change 2006-2030	0.01%	0.08%	Annualized change 2006-2030	0.39%	0.45%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 191 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,368	113.5	2010	336	27.9
2015	1,391	115.3	2015	344	28.5
2020	1,391	115.4	2020	342	28.4
2025	1,368	114.0	2025	334	27.8
2030	1,328	111.9	2030	319	26.9
Percent change 2006-2030	0.3%	1.9%	Percent change 2006-2030	-2.6%	-1.0%
Annualized change 2006-2030	0.01%	0.08%	Annualized change 2006-2030	-0.11%	-0.04%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	727	60.3	2010	306	25.3
2015	732	60.7	2015	315	26.1
2020	728	60.4	2020	321	26.6
2025	711	59.3	2025	322	26.9
2030	687	57.9	2030	322	27.1
Percent change 2006-2030	-1.6%	-0.1%	Percent change 2006-2030	7.9%	9.6%
Annualized change 2006-2030	-0.07%	0.00%	Annualized change 2006-2030	0.32%	0.38%

Non-Primary Care Specialties

Figure 192 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	106	8.8
2015	114	9.4
2020	120	10.0
2025	125	10.4
2030	128	10.8
Percent change 2006-2030	25.8%	27.8%
Annualized change 2006-2030	0.96%	1.03%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	476	39.4
2015	521	43.2
2020	560	46.4
2025	589	49.1
2030	612	51.6
Percent change 2006-2030	37.0%	39.2%
Annualized change 2006-2030	1.32%	1.39%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	203	16.8
2015	206	17.0
2020	205	17.0
2025	203	16.9
2030	199	16.8
Percent change 2006-2030	0.7%	2.3%
Annualized change 2006-2030	0.03%	0.10%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.0
2015	91	7.6
2020	85	7.1
2025	80	6.7
2030	74	6.2
Percent change 2006-2030	-27.6%	-26.4%
Annualized change 2006-2030	-1.34%	-1.27%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	206	17.0
2015	199	16.5
2020	189	15.6
2025	178	14.8
2030	168	14.2
Percent change 2006-2030	-20.3%	-19.0%
Annualized change 2006-2030	-0.94%	-0.87%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	234	19.4
2015	235	19.4
2020	243	20.1
2025	246	20.6
2030	244	20.6
Percent change 2006-2030	7.7%	9.4%
Annualized change 2006-2030	0.31%	0.38%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	218	18.1
2015	229	18.9
2020	235	19.5
2025	238	19.9
2030	240	20.2
Percent change 2006-2030	16.3%	18.2%
Annualized change 2006-2030	0.63%	0.70%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	169	14.1
2015	190	15.8
2020	210	17.4
2025	225	18.8
2030	236	19.9
Percent change 2006-2030	52.3%	54.8%
Annualized change 2006-2030	1.77%	1.84%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	133	11.0
2015	140	11.6
2020	142	11.7
2025	144	12.0
2030	145	12.2
Percent change 2006-2030	13.3%	15.1%
Annualized change 2006-2030	0.52%	0.59%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	78	6.4
2020	74	6.1
2025	70	5.8
2030	66	5.5
Percent change 2006-2030	-20.7%	-19.4%
Annualized change 2006-2030	-0.96%	-0.90%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.6
2015	44	3.7
2020	42	3.5
2025	42	3.5
2030	40	3.4
Percent change 2006-2030	-9.0%	-7.6%
Annualized change 2006-2030	-0.39%	-0.33%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	136	11.3
2020	139	11.5
2025	140	11.7
2030	141	11.8
Percent change 2006-2030	8.1%	9.9%
Annualized change 2006-2030	0.33%	0.39%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.3
2020	37	3.0
2025	35	2.9
2030	33	2.8
Percent change 2006-2030	-20.3%	-19.1%
Annualized change 2006-2030	-0.94%	-0.88%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.2
2015	50	4.1
2020	48	4.0
2025	46	3.8
2030	44	3.7
Percent change 2006-2030	-15.7%	-14.4%
Annualized change 2006-2030	-0.71%	-0.65%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	382	31.6
2015	386	32.0
2020	384	31.8
2025	378	31.6
2030	371	31.3
Percent change 2006-2030	-0.2%	1.4%
Annualized change 2006-2030	-0.01%	0.06%

Finger Lakes Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 193 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,969	329.1
2015	4,076	337.7
2020	4,131	342.7
2025	4,140	345.3
2030	4,128	348.0
Percent change 2006-2030	8.0%	9.7%
Annualized change 2006-2030	0.32%	0.39%

Figure 194 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,379	114.3	2010	2,590	214.7
2015	1,401	116.1	2015	2,675	221.6
2020	1,401	116.2	2020	2,731	226.5
2025	1,380	115.1	2025	2,760	230.1
2030	1,349	113.7	2030	2,779	234.3
Percent change 2006-2030	1.9%	3.5%	Percent change 2006-2030	11.2%	13.0%
Annualized change 2006-2030	0.08%	0.14%	Annualized change 2006-2030	0.44%	0.51%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 195 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,379	114.3	2010	337	27.9
2015	1,401	116.1	2015	342	28.4
2020	1,401	116.2	2020	340	28.2
2025	1,380	115.1	2025	330	27.6
2030	1,349	113.7	2030	316	26.7
Percent change 2006-2030	1.9%	3.5%	Percent change 2006-2030	-3.6%	-2.0%
Annualized change 2006-2030	0.08%	0.14%	Annualized change 2006-2030	-0.15%	-0.09%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	733	60.7	2010	309	25.6
2015	742	61.5	2015	317	26.2
2020	740	61.4	2020	321	26.6
2025	727	60.6	2025	323	26.9
2030	708	59.7	2030	325	27.4
Percent change 2006-2030	1.5%	3.1%	Percent change 2006-2030	8.9%	10.7%
Annualized change 2006-2030	0.06%	0.13%	Annualized change 2006-2030	0.36%	0.42%

Non-Primary Care Specialties

Figure 196 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	107	8.8
2015	115	9.5
2020	121	10.0
2025	126	10.5
2030	130	11.0
Percent change 2006-2030	27.9%	29.9%
Annualized change 2006-2030	1.03%	1.10%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	479	39.7
2015	526	43.6
2020	566	46.9
2025	597	49.8
2030	627	52.8
Percent change 2006-2030	40.2%	42.5%
Annualized change 2006-2030	1.42%	1.49%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	204	16.9
2015	207	17.2
2020	208	17.2
2025	206	17.2
2030	203	17.1
Percent change 2006-2030	2.6%	4.3%
Annualized change 2006-2030	0.11%	0.17%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.1
2015	92	7.6
2020	86	7.1
2025	80	6.7
2030	75	6.3
Percent change 2006-2030	-26.8%	-25.6%
Annualized change 2006-2030	-1.29%	-1.23%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	208	17.2
2015	203	16.8
2020	194	16.1
2025	184	15.3
2030	175	14.8
Percent change 2006-2030	-17.1%	-15.7%
Annualized change 2006-2030	-0.78%	-0.71%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	235	19.5
2015	235	19.5
2020	242	20.1
2025	245	20.5
2030	245	20.7
Percent change 2006-2030	7.9%	9.7%
Annualized change 2006-2030	0.32%	0.39%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	220	18.2
2015	229	19.0
2020	234	19.4
2025	237	19.8
2030	239	20.2
Percent change 2006-2030	16.1%	18.0%
Annualized change 2006-2030	0.63%	0.69%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	171	14.1
2015	192	15.9
2020	210	17.4
2025	225	18.8
2030	238	20.1
Percent change 2006-2030	53.5%	56.0%
Annualized change 2006-2030	1.80%	1.87%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	134	11.1
2015	140	11.6
2020	142	11.8
2025	145	12.1
2030	147	12.4
Percent change 2006-2030	14.5%	16.3%
Annualized change 2006-2030	0.57%	0.63%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	77	6.4
2020	74	6.1
2025	69	5.8
2030	66	5.5
Percent change 2006-2030	-20.8%	-19.6%
Annualized change 2006-2030	-0.97%	-0.90%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.6
2015	44	3.6
2020	43	3.6
2025	42	3.5
2030	40	3.4
Percent change 2006-2030	-8.3%	-6.8%
Annualized change 2006-2030	-0.36%	-0.29%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	137	11.3
2020	138	11.5
2025	139	11.6
2030	140	11.8
Percent change 2006-2030	7.8%	9.5%
Annualized change 2006-2030	0.31%	0.38%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.2
2020	37	3.0
2025	35	2.9
2030	33	2.8
Percent change 2006-2030	-20.7%	-19.4%
Annualized change 2006-2030	-0.96%	-0.89%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.3
2015	50	4.1
2020	48	4.0
2025	46	3.9
2030	44	3.7
Percent change 2006-2030	-15.2%	-13.8%
Annualized change 2006-2030	-0.68%	-0.62%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	384	31.9
2015	390	32.3
2020	388	32.1
2025	382	31.9
2030	377	31.8
Percent change 2006-2030	1.3%	2.9%
Annualized change 2006-2030	0.05%	0.12%

Finger Lakes Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 197 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,932	326.1
2015	3,992	330.7
2020	3,997	331.5
2025	3,954	329.8
2030	3,878	326.9
Percent change 2006-2030	1.4%	3.1%
Annualized change 2006-2030	0.06%	0.13%

Figure 198 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,366	113.3	2010	2,566	212.8
2015	1,376	114.0	2015	2,616	216.7
2020	1,363	113.0	2020	2,634	218.5
2025	1,327	110.6	2025	2,627	219.1
2030	1,276	107.6	2030	2,602	219.3
Percent change 2006-2030	-3.6%	-2.0%	Percent change 2006-2030	4.1%	5.8%
Annualized change 2006-2030	-0.15%	-0.09%	Annualized change 2006-2030	0.17%	0.23%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 199 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,366	113.3	2010	336	27.8
2015	1,376	114.0	2015	340	28.2
2020	1,363	113.0	2020	335	27.8
2025	1,327	110.6	2025	324	27.0
2030	1,276	107.6	2030	307	25.9
Percent change 2006-2030	-3.6%	-2.0%	Percent change 2006-2030	-6.3%	-4.8%
Annualized change 2006-2030	-0.15%	-0.09%	Annualized change 2006-2030	-0.27%	-0.21%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	725	60.1	2010	305	25.3
2015	724	60.0	2015	312	25.8
2020	713	59.1	2020	315	26.1
2025	690	57.5	2025	313	26.1
2030	660	55.6	2030	309	26.1
Percent change 2006-2030	-5.4%	-3.9%	Percent change 2006-2030	3.7%	5.4%
Annualized change 2006-2030	-0.23%	-0.17%	Annualized change 2006-2030	0.15%	0.22%

Non-Primary Care Specialties

Figure 200 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	105	8.7
2015	112	9.3
2020	117	9.7
2025	120	10.0
2030	122	10.3
Percent change 2006-2030	19.3%	21.2%
Annualized change 2006-2030	0.74%	0.81%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	474	39.3
2015	513	42.5
2020	544	45.1
2025	565	47.1
2030	581	49.0
Percent change 2006-2030	30.0%	32.1%
Annualized change 2006-2030	1.10%	1.17%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	202	16.8
2015	202	16.8
2020	200	16.6
2025	195	16.2
2030	189	15.9
Percent change 2006-2030	-4.5%	-2.9%
Annualized change 2006-2030	-0.19%	-0.12%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.0
2015	90	7.5
2020	83	6.9
2025	77	6.4
2030	70	5.9
Percent change 2006-2030	-31.3%	-30.2%
Annualized change 2006-2030	-1.55%	-1.49%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	205	17.0
2015	196	16.2
2020	183	15.2
2025	171	14.2
2030	160	13.5
Percent change 2006-2030	-24.3%	-23.1%
Annualized change 2006-2030	-1.16%	-1.09%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	233	19.3
2015	231	19.1
2020	236	19.6
2025	236	19.7
2030	232	19.6
Percent change 2006-2030	2.2%	3.8%
Annualized change 2006-2030	0.09%	0.16%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	218	18.1
2015	225	18.6
2020	228	18.9
2025	229	19.1
2030	227	19.2
Percent change 2006-2030	10.4%	12.2%
Annualized change 2006-2030	0.41%	0.48%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	169	14.0
2015	187	15.5
2020	204	16.9
2025	216	18.0
2030	224	18.9
Percent change 2006-2030	44.5%	46.9%
Annualized change 2006-2030	1.55%	1.61%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	133	11.0
2015	137	11.4
2020	138	11.4
2025	138	11.5
2030	138	11.6
Percent change 2006-2030	7.5%	9.2%
Annualized change 2006-2030	0.30%	0.37%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	76	6.3
2020	71	5.9
2025	67	5.6
2030	62	5.3
Percent change 2006-2030	-24.8%	-23.6%
Annualized change 2006-2030	-1.18%	-1.11%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	43	3.6
2015	43	3.6
2020	41	3.4
2025	40	3.3
2030	38	3.2
Percent change 2006-2030	-13.7%	-12.3%
Annualized change 2006-2030	-0.61%	-0.55%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	134	11.1
2020	135	11.2
2025	134	11.2
2030	133	11.2
Percent change 2006-2030	2.6%	4.2%
Annualized change 2006-2030	0.11%	0.17%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.2
2020	36	3.0
2025	34	2.8
2030	32	2.7
Percent change 2006-2030	-24.4%	-23.2%
Annualized change 2006-2030	-1.16%	-1.09%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.2
2015	49	4.1
2020	47	3.9
2025	44	3.7
2030	42	3.5
Percent change 2006-2030	-20.1%	-18.8%
Annualized change 2006-2030	-0.93%	-0.86%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	381	31.6
2015	380	31.5
2020	373	30.9
2025	363	30.3
2030	352	29.7
Percent change 2006-2030	-5.3%	-3.8%
Annualized change 2006-2030	-0.23%	-0.16%

Finger Lakes Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 201 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,969	329.1
2015	4,076	337.7
2020	4,131	342.7
2025	4,140	345.3
2030	4,128	348.0
Percent change 2006-2030	8.0%	9.7%
Annualized change 2006-2030	0.32%	0.39%

Figure 202 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,379	114.3	2010	2,589	214.7
2015	1,403	116.3	2015	2,673	221.4
2020	1,405	116.6	2020	2,726	226.1
2025	1,387	115.7	2025	2,753	229.6
2030	1,357	114.4	2030	2,771	233.6
Percent change 2006-2030	2.5%	4.2%	Percent change 2006-2030	10.9%	12.7%
Annualized change 2006-2030	0.10%	0.17%	Annualized change 2006-2030	0.43%	0.50%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 203 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,379	114.3	2010	337	27.9
2015	1,403	116.3	2015	343	28.4
2020	1,405	116.6	2020	341	28.3
2025	1,387	115.7	2025	332	27.7
2030	1,357	114.4	2030	318	26.8
Percent change 2006-2030	2.5%	4.2%	Percent change 2006-2030	-3.0%	-1.4%
Annualized change 2006-2030	0.10%	0.17%	Annualized change 2006-2030	-0.13%	-0.06%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	733	60.8	2010	309	25.7
2015	743	61.6	2015	317	26.3
2020	742	61.6	2020	322	26.7
2025	731	60.9	2025	325	27.1
2030	713	60.1	2030	327	27.5
Percent change 2006-2030	2.1%	3.7%	Percent change 2006-2030	9.6%	11.4%
Annualized change 2006-2030	0.09%	0.15%	Annualized change 2006-2030	0.38%	0.45%

Non-Primary Care Specialties

Figure 204 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	107	8.8
2015	115	9.5
2020	121	10.0
2025	125	10.5
2030	130	11.0
Percent change 2006-2030	27.5%	29.6%
Annualized change 2006-2030	1.02%	1.08%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	479	39.7
2015	525	43.5
2020	565	46.8
2025	596	49.7
2030	625	52.7
Percent change 2006-2030	39.8%	42.1%
Annualized change 2006-2030	1.41%	1.47%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	204	16.9
2015	207	17.2
2020	208	17.2
2025	205	17.1
2030	203	17.1
Percent change 2006-2030	2.3%	3.9%
Annualized change 2006-2030	0.09%	0.16%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.1
2015	91	7.6
2020	86	7.1
2025	80	6.7
2030	74	6.3
Percent change 2006-2030	-27.0%	-25.9%
Annualized change 2006-2030	-1.31%	-1.24%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	208	17.2
2015	203	16.8
2020	193	16.0
2025	183	15.3
2030	174	14.7
Percent change 2006-2030	-17.3%	-16.0%
Annualized change 2006-2030	-0.79%	-0.72%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	235	19.5
2015	235	19.5
2020	242	20.1
2025	245	20.4
2030	244	20.6
Percent change 2006-2030	7.6%	9.3%
Annualized change 2006-2030	0.31%	0.37%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	220	18.2
2015	229	19.0
2020	234	19.4
2025	237	19.7
2030	239	20.1
Percent change 2006-2030	15.8%	17.7%
Annualized change 2006-2030	0.61%	0.68%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	171	14.1
2015	191	15.9
2020	210	17.4
2025	225	18.8
2030	237	20.0
Percent change 2006-2030	53.1%	55.5%
Annualized change 2006-2030	1.79%	1.86%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	134	11.1
2015	140	11.6
2020	142	11.8
2025	144	12.0
2030	146	12.3
Percent change 2006-2030	14.1%	16.0%
Annualized change 2006-2030	0.55%	0.62%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	77	6.4
2020	73	6.1
2025	69	5.8
2030	66	5.5
Percent change 2006-2030	-21.1%	-19.8%
Annualized change 2006-2030	-0.98%	-0.92%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.6
2015	44	3.6
2020	43	3.6
2025	42	3.5
2030	40	3.4
Percent change 2006-2030	-8.5%	-7.1%
Annualized change 2006-2030	-0.37%	-0.30%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	137	11.3
2020	138	11.5
2025	139	11.6
2030	140	11.8
Percent change 2006-2030	7.4%	9.2%
Annualized change 2006-2030	0.30%	0.37%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.2
2020	37	3.0
2025	35	2.9
2030	33	2.8
Percent change 2006-2030	-20.9%	-19.7%
Annualized change 2006-2030	-0.97%	-0.91%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.3
2015	50	4.1
2020	48	4.0
2025	46	3.9
2030	44	3.7
Percent change 2006-2030	-15.5%	-14.1%
Annualized change 2006-2030	-0.70%	-0.63%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	384	31.8
2015	389	32.2
2020	387	32.1
2025	381	31.8
2030	376	31.7
Percent change 2006-2030	1.0%	2.6%
Annualized change 2006-2030	0.04%	0.11%

Finger Lakes Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 205 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,932	326.1
2015	3,992	330.7
2020	3,997	331.5
2025	3,954	329.8
2030	3,878	326.9
Percent change 2006-2030	1.4%	3.1%
Annualized change 2006-2030	0.06%	0.13%

Figure 206 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,366	113.3	2010	2,566	212.8
2015	1,378	114.2	2015	2,613	216.5
2020	1,367	113.4	2020	2,629	218.1
2025	1,333	111.2	2025	2,621	218.6
2030	1,284	108.3	2030	2,594	218.7
Percent change 2006-2030	-3.0%	-1.4%	Percent change 2006-2030	3.8%	5.5%
Annualized change 2006-2030	-0.13%	-0.06%	Annualized change 2006-2030	0.16%	0.22%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 207 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,366	113.3	2010	336	27.8
2015	1,378	114.2	2015	340	28.2
2020	1,367	113.4	2020	336	27.9
2025	1,333	111.2	2025	325	27.1
2030	1,284	108.3	2030	309	26.1
Percent change 2006-2030	-3.0%	-1.4%	Percent change 2006-2030	-5.8%	-4.2%
Annualized change 2006-2030	-0.13%	-0.06%	Annualized change 2006-2030	-0.25%	-0.18%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	726	60.2	2010	305	25.3
2015	726	60.1	2015	312	25.9
2020	715	59.3	2020	316	26.2
2025	693	57.8	2025	314	26.2
2030	664	56.0	2030	311	26.2
Percent change 2006-2030	-4.8%	-3.3%	Percent change 2006-2030	4.4%	6.1%
Annualized change 2006-2030	-0.21%	-0.14%	Annualized change 2006-2030	0.18%	0.25%

Non-Primary Care Specialties

Figure 208 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	105	8.7
2015	112	9.3
2020	117	9.7
2025	120	10.0
2030	121	10.2
Percent change 2006-2030	19.0%	20.9%
Annualized change 2006-2030	0.73%	0.79%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	474	39.3
2015	512	42.4
2020	543	45.0
2025	564	47.0
2030	579	48.8
Percent change 2006-2030	29.6%	31.7%
Annualized change 2006-2030	1.09%	1.15%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	202	16.8
2015	202	16.7
2020	199	16.5
2025	194	16.2
2030	189	15.9
Percent change 2006-2030	-4.8%	-3.2%
Annualized change 2006-2030	-0.20%	-0.14%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.0
2015	90	7.4
2020	83	6.9
2025	77	6.4
2030	70	5.9
Percent change 2006-2030	-31.5%	-30.4%
Annualized change 2006-2030	-1.57%	-1.50%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	205	17.0
2015	196	16.2
2020	183	15.2
2025	170	14.2
2030	159	13.4
Percent change 2006-2030	-24.6%	-23.4%
Annualized change 2006-2030	-1.17%	-1.10%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	233	19.3
2015	231	19.1
2020	235	19.5
2025	236	19.7
2030	231	19.5
Percent change 2006-2030	1.9%	3.5%
Annualized change 2006-2030	0.08%	0.14%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	218	18.1
2015	225	18.6
2020	228	18.9
2025	228	19.0
2030	227	19.1
Percent change 2006-2030	10.0%	11.8%
Annualized change 2006-2030	0.40%	0.47%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	169	14.0
2015	187	15.5
2020	203	16.9
2025	215	17.9
2030	223	18.8
Percent change 2006-2030	44.1%	46.4%
Annualized change 2006-2030	1.53%	1.60%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	133	11.0
2015	137	11.4
2020	137	11.4
2025	138	11.5
2030	137	11.6
Percent change 2006-2030	7.1%	8.9%
Annualized change 2006-2030	0.29%	0.35%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	76	6.3
2020	71	5.9
2025	67	5.6
2030	62	5.2
Percent change 2006-2030	-25.0%	-23.8%
Annualized change 2006-2030	-1.19%	-1.13%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	43	3.6
2015	43	3.6
2020	41	3.4
2025	40	3.3
2030	38	3.2
Percent change 2006-2030	-14.0%	-12.6%
Annualized change 2006-2030	-0.62%	-0.56%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	134	11.1
2020	134	11.2
2025	134	11.2
2030	133	11.2
Percent change 2006-2030	2.2%	3.9%
Annualized change 2006-2030	0.09%	0.16%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.2
2020	36	2.9
2025	34	2.8
2030	32	2.7
Percent change 2006-2030	-24.7%	-23.4%
Annualized change 2006-2030	-1.17%	-1.11%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.2
2015	49	4.1
2020	47	3.9
2025	44	3.7
2030	41	3.5
Percent change 2006-2030	-20.3%	-19.0%
Annualized change 2006-2030	-0.94%	-0.88%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	381	31.6
2015	380	31.5
2020	372	30.9
2025	362	30.2
2030	351	29.6
Percent change 2006-2030	-5.6%	-4.1%
Annualized change 2006-2030	-0.24%	-0.17%

Finger Lakes Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 209 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,969	329.1
2015	4,076	337.7
2020	4,131	342.7
2025	4,140	345.3
2030	4,128	348.0
Percent change 2006-2030	8.0%	9.7%
Annualized change 2006-2030	0.32%	0.39%

Figure 210 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,379	114.4	2010	2,589	214.7
2015	1,405	116.4	2015	2,671	221.3
2020	1,408	116.8	2020	2,723	225.9
2025	1,391	116.0	2025	2,749	229.2
2030	1,362	114.9	2030	2,766	233.1
Percent change 2006-2030	2.9%	4.6%	Percent change 2006-2030	10.7%	12.5%
Annualized change 2006-2030	0.12%	0.19%	Annualized change 2006-2030	0.42%	0.49%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 211 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,379	114.4	2010	337	27.9
2015	1,405	116.4	2015	343	28.4
2020	1,408	116.8	2020	342	28.3
2025	1,391	116.0	2025	333	27.8
2030	1,362	114.9	2030	319	26.9
Percent change 2006-2030	2.9%	4.6%	Percent change 2006-2030	-2.6%	-1.0%
Annualized change 2006-2030	0.12%	0.19%	Annualized change 2006-2030	-0.11%	-0.04%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	733	60.8	2010	309	25.7
2015	744	61.6	2015	317	26.3
2020	744	61.7	2020	323	26.8
2025	733	61.1	2025	326	27.2
2030	715	60.3	2030	328	27.6
Percent change 2006-2030	2.5%	4.1%	Percent change 2006-2030	10.0%	11.8%
Annualized change 2006-2030	0.10%	0.17%	Annualized change 2006-2030	0.40%	0.47%

Non-Primary Care Specialties

Figure 212 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	107	8.8
2015	114	9.5
2020	121	10.0
2025	125	10.4
2030	130	10.9
Percent change 2006-2030	27.3%	29.3%
Annualized change 2006-2030	1.01%	1.08%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	479	39.7
2015	525	43.5
2020	564	46.8
2025	595	49.6
2030	624	52.6
Percent change 2006-2030	39.5%	41.8%
Annualized change 2006-2030	1.40%	1.47%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	203	16.9
2015	207	17.2
2020	207	17.2
2025	205	17.1
2030	202	17.0
Percent change 2006-2030	2.1%	3.8%
Annualized change 2006-2030	0.09%	0.15%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.1
2015	91	7.6
2020	86	7.1
2025	80	6.7
2030	74	6.3
Percent change 2006-2030	-27.2%	-26.0%
Annualized change 2006-2030	-1.31%	-1.25%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	208	17.2
2015	203	16.8
2020	193	16.0
2025	183	15.2
2030	174	14.7
Percent change 2006-2030	-17.5%	-16.1%
Annualized change 2006-2030	-0.80%	-0.73%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	235	19.5
2015	235	19.5
2020	242	20.0
2025	244	20.4
2030	244	20.6
Percent change 2006-2030	7.4%	9.1%
Annualized change 2006-2030	0.30%	0.37%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	220	18.2
2015	229	19.0
2020	234	19.4
2025	236	19.7
2030	238	20.1
Percent change 2006-2030	15.6%	17.4%
Annualized change 2006-2030	0.60%	0.67%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	170	14.1
2015	191	15.8
2020	209	17.4
2025	225	18.7
2030	237	20.0
Percent change 2006-2030	52.8%	55.2%
Annualized change 2006-2030	1.78%	1.85%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	134	11.1
2015	140	11.6
2020	142	11.8
2025	144	12.0
2030	146	12.3
Percent change 2006-2030	13.9%	15.8%
Annualized change 2006-2030	0.54%	0.61%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	77	6.4
2020	73	6.1
2025	69	5.8
2030	65	5.5
Percent change 2006-2030	-21.2%	-20.0%
Annualized change 2006-2030	-0.99%	-0.92%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	44	3.6
2015	44	3.6
2020	43	3.5
2025	42	3.5
2030	40	3.4
Percent change 2006-2030	-8.7%	-7.2%
Annualized change 2006-2030	-0.38%	-0.31%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	136	11.3
2020	138	11.4
2025	139	11.6
2030	139	11.8
Percent change 2006-2030	7.2%	9.0%
Annualized change 2006-2030	0.29%	0.36%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.2
2020	37	3.0
2025	35	2.9
2030	33	2.8
Percent change 2006-2030	-21.1%	-19.8%
Annualized change 2006-2030	-0.98%	-0.92%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.3
2015	50	4.1
2020	48	4.0
2025	46	3.9
2030	44	3.7
Percent change 2006-2030	-15.6%	-14.2%
Annualized change 2006-2030	-0.70%	-0.64%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	384	31.8
2015	389	32.2
2020	386	32.1
2025	380	31.7
2030	375	31.6
Percent change 2006-2030	0.8%	2.4%
Annualized change 2006-2030	0.03%	0.10%

Finger Lakes Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 213 – Finger Lakes Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,823	317.2
2010	3,932	326.1
2015	3,992	330.7
2020	3,997	331.5
2025	3,954	329.8
2030	3,878	326.9
Percent change 2006-2030	1.4%	3.1%
Annualized change 2006-2030	0.06%	0.13%

Figure 214 – Finger Lakes Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,367	113.3	2010	2,566	212.7
2015	1,380	114.3	2015	2,612	216.4
2020	1,370	113.6	2020	2,627	217.9
2025	1,337	111.5	2025	2,617	218.3
2030	1,289	108.7	2030	2,589	218.2
Percent change 2006-2030	-2.6%	-1.1%	Percent change 2006-2030	3.6%	5.3%
Annualized change 2006-2030	-0.11%	-0.04%	Annualized change 2006-2030	0.15%	0.21%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 215 – Finger Lakes Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,367	113.3	2010	336	27.8
2015	1,380	114.3	2015	341	28.2
2020	1,370	113.6	2020	337	28.0
2025	1,337	111.5	2025	326	27.2
2030	1,289	108.7	2030	310	26.2
Percent change 2006-2030	-2.6%	-1.1%	Percent change 2006-2030	-5.4%	-3.9%
Annualized change 2006-2030	-0.11%	-0.04%	Annualized change 2006-2030	-0.23%	-0.16%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	726	60.2	2010	305	25.3
2015	726	60.2	2015	313	25.9
2020	717	59.4	2020	316	26.2
2025	695	58.0	2025	315	26.3
2030	667	56.2	2030	312	26.3
Percent change 2006-2030	-4.5%	-2.9%	Percent change 2006-2030	4.8%	6.5%
Annualized change 2006-2030	-0.19%	-0.12%	Annualized change 2006-2030	0.19%	0.26%

Non-Primary Care Specialties

Figure 216 – Finger Lakes Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	105	8.7
2015	112	9.3
2020	117	9.7
2025	119	10.0
2030	121	10.2
Percent change 2006-2030	18.7%	20.7%
Annualized change 2006-2030	0.72%	0.79%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	447	37.1
2010	474	39.3
2015	512	42.4
2020	542	45.0
2025	563	46.9
2030	578	48.7
Percent change 2006-2030	29.3%	31.4%
Annualized change 2006-2030	1.08%	1.15%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	198	16.4
2010	202	16.8
2015	202	16.7
2020	199	16.5
2025	194	16.2
2030	188	15.9
Percent change 2006-2030	-4.9%	-3.4%
Annualized change 2006-2030	-0.21%	-0.14%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	102	8.5
2010	97	8.0
2015	90	7.4
2020	83	6.9
2025	77	6.4
2030	70	5.9
Percent change 2006-2030	-31.6%	-30.5%
Annualized change 2006-2030	-1.57%	-1.51%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	211	17.5
2010	205	17.0
2015	196	16.2
2020	183	15.2
2025	170	14.2
2030	159	13.4
Percent change 2006-2030	-24.7%	-23.5%
Annualized change 2006-2030	-1.18%	-1.11%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	227	18.8
2010	233	19.3
2015	230	19.1
2020	235	19.5
2025	235	19.6
2030	231	19.5
Percent change 2006-2030	1.7%	3.3%
Annualized change 2006-2030	0.07%	0.14%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	206	17.1
2010	218	18.1
2015	225	18.6
2020	227	18.9
2025	228	19.0
2030	226	19.1
Percent change 2006-2030	9.8%	11.6%
Annualized change 2006-2030	0.39%	0.46%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	155	12.9
2010	169	14.0
2015	187	15.5
2020	203	16.8
2025	215	17.9
2030	223	18.8
Percent change 2006-2030	43.8%	46.1%
Annualized change 2006-2030	1.53%	1.59%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	128	10.6
2010	133	11.0
2015	137	11.4
2020	137	11.4
2025	138	11.5
2030	137	11.5
Percent change 2006-2030	6.9%	8.7%
Annualized change 2006-2030	0.28%	0.35%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	83	6.9
2010	81	6.7
2015	76	6.3
2020	71	5.9
2025	66	5.5
2030	62	5.2
Percent change 2006-2030	-25.1%	-23.9%
Annualized change 2006-2030	-1.20%	-1.13%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	44	3.7
2010	43	3.6
2015	43	3.6
2020	41	3.4
2025	40	3.3
2030	38	3.2
Percent change 2006-2030	-14.1%	-12.7%
Annualized change 2006-2030	-0.63%	-0.57%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	134	11.1
2020	134	11.1
2025	134	11.1
2030	133	11.2
Percent change 2006-2030	2.1%	3.7%
Annualized change 2006-2030	0.08%	0.15%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	42	3.5
2010	41	3.4
2015	39	3.2
2020	35	2.9
2025	34	2.8
2030	32	2.7
Percent change 2006-2030	-24.8%	-23.6%
Annualized change 2006-2030	-1.18%	-1.11%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	52	4.3
2010	51	4.2
2015	49	4.1
2020	47	3.9
2025	44	3.6
2030	41	3.5
Percent change 2006-2030	-20.5%	-19.2%
Annualized change 2006-2030	-0.95%	-0.88%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	372	30.9
2010	380	31.5
2015	380	31.5
2020	372	30.8
2025	362	30.2
2030	351	29.5
Percent change 2006-2030	-5.8%	-4.2%
Annualized change 2006-2030	-0.25%	-0.18%

Hudson Valley Physician Supply, 2006 – 2030
Hudson Valley Supply Scenario 1: Baseline (Supply Not Responsive to Demand)

Figure 217 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,569	371.0
2015	8,818	376.1
2020	8,950	376.5
2025	8,987	374.2
2030	8,977	371.7
Percent change 2006-2030	8.5%	2.5%
Annualized change 2006-2030	0.34%	0.10%

Figure 218 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,908	125.9	2010	5,661	245.1
2015	2,973	126.8	2015	5,846	249.3
2020	2,992	125.9	2020	5,959	250.7
2025	2,970	123.6	2025	6,017	250.5
2030	2,922	121.0	2030	6,055	250.7
Percent change 2006-2030	4.8%	-1.0%	Percent change 2006-2030	10.4%	4.2%
Annualized change 2006-2030	0.20%	-0.04%	Annualized change 2006-2030	0.41%	0.17%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 219 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,908	125.9	2010	574	24.8
2015	2,973	126.8	2015	587	25.0
2020	2,992	125.9	2020	586	24.6
2025	2,970	123.6	2025	573	23.9
2030	2,922	121.0	2030	551	22.8
Percent change 2006-2030	4.8%	-1.0%	Percent change 2006-2030	-1.2%	-6.6%
Annualized change 2006-2030	0.20%	-0.04%	Annualized change 2006-2030	-0.05%	-0.29%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,618	70.1	2010	716	31.0
2015	1,649	70.3	2015	737	31.4
2020	1,654	69.6	2020	752	31.6
2025	1,635	68.1	2025	762	31.7
2030	1,601	66.3	2030	769	31.8
Percent change 2006-2030	4.0%	-1.8%	Percent change 2006-2030	11.6%	5.5%
Annualized change 2006-2030	0.16%	-0.07%	Annualized change 2006-2030	0.46%	0.22%

Non-Primary Care Specialties

Figure 220 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	235	10.2
2015	254	10.8
2020	269	11.3
2025	281	11.7
2030	293	12.1
Percent change 2006-2030	31.0%	23.7%
Annualized change 2006-2030	1.13%	0.89%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	951	41.2
2015	1,050	44.8
2020	1,137	47.8
2025	1,207	50.3
2030	1,273	52.7
Percent change 2006-2030	43.6%	35.7%
Annualized change 2006-2030	1.52%	1.28%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	416	18.0
2015	427	18.2
2020	430	18.1
2025	429	17.8
2030	425	17.6
Percent change 2006-2030	5.1%	-0.7%
Annualized change 2006-2030	0.21%	-0.03%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	162	7.0
2015	154	6.6
2020	145	6.1
2025	137	5.7
2030	127	5.3
Percent change 2006-2030	-25.0%	-29.2%
Annualized change 2006-2030	-1.19%	-1.43%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	826	35.8
2015	812	34.6
2020	779	32.8
2025	742	30.9
2030	711	29.4
Percent change 2006-2030	-15.0%	-19.7%
Annualized change 2006-2030	-0.68%	-0.91%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	436	18.9
2015	439	18.7
2020	455	19.2
2025	464	19.3
2030	465	19.3
Percent change 2006-2030	10.6%	4.4%
Annualized change 2006-2030	0.42%	0.18%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	388	16.8
2015	407	17.4
2020	419	17.6
2025	426	17.7
2030	432	17.9
Percent change 2006-2030	19.0%	12.4%
Annualized change 2006-2030	0.73%	0.49%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	265	11.5
2015	300	12.8
2020	331	13.9
2025	357	14.9
2030	379	15.7
Percent change 2006-2030	57.2%	48.5%
Annualized change 2006-2030	1.90%	1.66%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	282	12.2
2015	295	12.6
2020	302	12.7
2025	309	12.9
2030	314	13.0
Percent change 2006-2030	17.3%	10.8%
Annualized change 2006-2030	0.67%	0.43%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	241	10.4
2015	232	9.9
2020	222	9.3
2025	210	8.7
2030	200	8.3
Percent change 2006-2030	-18.9%	-23.4%
Annualized change 2006-2030	-0.87%	-1.10%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	103	4.5
2015	104	4.4
2020	102	4.3
2025	100	4.2
2030	97	4.0
Percent change 2006-2030	-6.0%	-11.2%
Annualized change 2006-2030	-0.26%	-0.49%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	205	8.9
2015	210	8.9
2020	214	9.0
2025	216	9.0
2030	219	9.0
Percent change 2006-2030	10.4%	4.3%
Annualized change 2006-2030	0.41%	0.17%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	96	4.1
2020	91	3.8
2025	88	3.6
2030	84	3.5
Percent change 2006-2030	-18.8%	-23.3%
Annualized change 2006-2030	-0.86%	-1.10%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	141	6.1
2015	137	5.9
2020	134	5.6
2025	129	5.4
2030	123	5.1
Percent change 2006-2030	-13.1%	-17.9%
Annualized change 2006-2030	-0.59%	-0.82%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	910	39.4
2015	929	39.6
2020	929	39.1
2025	921	38.4
2030	913	37.8
Percent change 2006-2030	3.8%	-2.0%
Annualized change 2006-2030	0.15%	-0.08%

Hudson Valley Supply Scenario 1: Baseline (Supply Responsive to Demand)

Figure 221 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,595	372.1
2015	8,834	376.8
2020	8,945	376.3
2025	8,961	373.1
2030	8,923	369.4
Percent change 2006-2030	7.8%	1.9%
Annualized change 2006-2030	0.32%	0.08%

Figure 222 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,913	126.1	2010	5,682	246.0
2015	2,975	126.9	2015	5,859	249.9
2020	2,994	125.9	2020	5,951	250.4
2025	2,973	123.8	2025	5,988	249.3
2030	2,921	120.9	2030	6,002	248.5
Percent change 2006-2030	4.8%	-1.0%	Percent change 2006-2030	9.4%	3.3%
Annualized change 2006-2030	0.20%	-0.04%	Annualized change 2006-2030	0.37%	0.14%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 223 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,913	126.1	2010	579	25.1
2015	2,975	126.9	2015	596	25.4
2020	2,994	125.9	2020	599	25.2
2025	2,973	123.8	2025	590	24.5
2030	2,921	120.9	2030	571	23.6
Percent change 2006-2030	4.8%	-1.0%	Percent change 2006-2030	2.3%	-3.4%
Annualized change 2006-2030	0.20%	-0.04%	Annualized change 2006-2030	0.09%	-0.14%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,625	70.4	2010	709	30.7
2015	1,651	70.4	2015	728	31.0
2020	1,648	69.3	2020	747	31.4
2025	1,622	67.5	2025	761	31.7
2030	1,579	65.4	2030	771	31.9
Percent change 2006-2030	2.6%	-3.1%	Percent change 2006-2030	11.9%	5.7%
Annualized change 2006-2030	0.11%	-0.13%	Annualized change 2006-2030	0.47%	0.23%

Non-Primary Care Specialties

Figure 224 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	236	10.2
2015	254	10.8
2020	267	11.2
2025	278	11.6
2030	289	11.9
Percent change 2006-2030	28.8%	21.7%
Annualized change 2006-2030	1.06%	0.82%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	954	41.3
2015	1,050	44.8
2020	1,128	47.4
2025	1,193	49.7
2030	1,249	51.7
Percent change 2006-2030	41.0%	33.2%
Annualized change 2006-2030	1.44%	1.20%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	418	18.1
2015	431	18.4
2020	436	18.3
2025	434	18.1
2030	430	17.8
Percent change 2006-2030	6.5%	0.6%
Annualized change 2006-2030	0.26%	0.03%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	163	7.1
2015	155	6.6
2020	146	6.1
2025	137	5.7
2030	127	5.3
Percent change 2006-2030	-25.2%	-29.4%
Annualized change 2006-2030	-1.20%	-1.44%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	826	35.8
2015	809	34.5
2020	772	32.5
2025	731	30.4
2030	696	28.8
Percent change 2006-2030	-16.8%	-21.4%
Annualized change 2006-2030	-0.77%	-1.00%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	438	19.0
2015	441	18.8
2020	456	19.2
2025	464	19.3
2030	464	19.2
Percent change 2006-2030	10.2%	4.1%
Annualized change 2006-2030	0.41%	0.17%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	390	16.9
2015	410	17.5
2020	420	17.7
2025	426	17.8
2030	431	17.8
Percent change 2006-2030	18.7%	12.1%
Annualized change 2006-2030	0.72%	0.48%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	266	11.5
2015	301	12.8
2020	332	14.0
2025	358	14.9
2030	379	15.7
Percent change 2006-2030	57.3%	48.6%
Annualized change 2006-2030	1.91%	1.66%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	283	12.2
2015	296	12.6
2020	301	12.7
2025	308	12.8
2030	312	12.9
Percent change 2006-2030	16.4%	9.9%
Annualized change 2006-2030	0.63%	0.39%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	242	10.5
2015	233	9.9
2020	221	9.3
2025	209	8.7
2030	199	8.2
Percent change 2006-2030	-19.6%	-24.1%
Annualized change 2006-2030	-0.91%	-1.14%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	104	4.5
2015	104	4.4
2020	102	4.3
2025	100	4.2
2030	96	4.0
Percent change 2006-2030	-7.2%	-12.3%
Annualized change 2006-2030	-0.31%	-0.55%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	206	8.9
2015	211	9.0
2020	216	9.1
2025	218	9.1
2030	220	9.1
Percent change 2006-2030	11.2%	5.0%
Annualized change 2006-2030	0.44%	0.20%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	96	4.1
2020	91	3.8
2025	87	3.6
2030	83	3.4
Percent change 2006-2030	-19.5%	-23.9%
Annualized change 2006-2030	-0.90%	-1.13%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	141	6.1
2015	138	5.9
2020	134	5.6
2025	129	5.4
2030	123	5.1
Percent change 2006-2030	-13.6%	-18.4%
Annualized change 2006-2030	-0.61%	-0.84%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	914	39.6
2015	931	39.7
2020	929	39.1
2025	918	38.2
2030	905	37.5
Percent change 2006-2030	2.9%	-2.8%
Annualized change 2006-2030	0.12%	-0.12%

Hudson Valley Supply Scenario 2a: NP/PA High Growth (Supply Not Responsive to Demand)

Figure 225 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,759	379.2
2015	9,246	394.4
2020	9,613	404.4
2025	9,880	411.4
2030	10,108	418.4
Percent change 2006-2030	22.2%	15.4%
Annualized change 2006-2030	0.84%	0.60%

Figure 226 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,992	129.6	2010	5,767	249.7
2015	3,159	134.8	2015	6,087	259.6
2020	3,277	137.9	2020	6,336	266.5
2025	3,353	139.6	2025	6,527	271.7
2030	3,408	141.1	2030	6,700	277.4
Percent change 2006-2030	22.3%	15.5%	Percent change 2006-2030	22.1%	15.3%
Annualized change 2006-2030	0.84%	0.60%	Annualized change 2006-2030	0.84%	0.60%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 227 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,992	129.6	2010	590	25.6
2015	3,159	134.8	2015	624	26.6
2020	3,277	137.9	2020	642	27.0
2025	3,353	139.6	2025	647	26.9
2030	3,408	141.1	2030	643	26.6
Percent change 2006-2030	22.3%	15.5%	Percent change 2006-2030	15.2%	8.9%
Annualized change 2006-2030	0.84%	0.60%	Annualized change 2006-2030	0.59%	0.35%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,665	72.1	2010	737	31.9
2015	1,752	74.7	2015	783	33.4
2020	1,812	76.2	2020	824	34.7
2025	1,846	76.9	2025	860	35.8
2030	1,868	77.3	2030	897	37.1
Percent change 2006-2030	21.3%	14.6%	Percent change 2006-2030	30.2%	23.0%
Annualized change 2006-2030	0.81%	0.57%	Annualized change 2006-2030	1.11%	0.87%

Non-Primary Care Specialties

Figure 228 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	239	10.4
2015	264	11.3
2020	286	12.0
2025	305	12.7
2030	325	13.4
Percent change 2006-2030	44.9%	36.9%
Annualized change 2006-2030	1.56%	1.32%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	969	41.9
2015	1,093	46.6
2020	1,208	50.8
2025	1,310	54.5
2030	1,408	58.3
Percent change 2006-2030	58.9%	50.1%
Annualized change 2006-2030	1.95%	1.71%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	424	18.3
2015	444	18.9
2020	457	19.2
2025	465	19.4
2030	470	19.4
Percent change 2006-2030	16.3%	9.8%
Annualized change 2006-2030	0.63%	0.39%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	165	7.2
2015	160	6.8
2020	155	6.5
2025	148	6.2
2030	141	5.8
Percent change 2006-2030	-17.1%	-21.7%
Annualized change 2006-2030	-0.78%	-1.01%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	842	36.4
2015	846	36.1
2020	828	34.8
2025	805	33.5
2030	787	32.6
Percent change 2006-2030	-6.0%	-11.2%
Annualized change 2006-2030	-0.26%	-0.49%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	445	19.2
2015	458	19.5
2020	484	20.4
2025	503	21.0
2030	515	21.3
Percent change 2006-2030	22.3%	15.6%
Annualized change 2006-2030	0.84%	0.60%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	395	17.1
2015	424	18.1
2020	445	18.7
2025	462	19.2
2030	478	19.8
Percent change 2006-2030	31.6%	24.3%
Annualized change 2006-2030	1.15%	0.91%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	270	11.7
2015	312	13.3
2020	352	14.8
2025	388	16.1
2030	419	17.4
Percent change 2006-2030	74.0%	64.4%
Annualized change 2006-2030	2.33%	2.09%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	287	12.4
2015	307	13.1
2020	321	13.5
2025	335	14.0
2030	348	14.4
Percent change 2006-2030	29.7%	22.6%
Annualized change 2006-2030	1.09%	0.85%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	245	10.6
2015	241	10.3
2020	236	9.9
2025	228	9.5
2030	222	9.2
Percent change 2006-2030	-10.3%	-15.2%
Annualized change 2006-2030	-0.45%	-0.69%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	105	4.6
2015	108	4.6
2020	108	4.6
2025	109	4.5
2030	107	4.4
Percent change 2006-2030	4.0%	-1.8%
Annualized change 2006-2030	0.16%	-0.07%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	209	9.0
2015	218	9.3
2020	227	9.6
2025	234	9.8
2030	242	10.0
Percent change 2006-2030	22.1%	15.4%
Annualized change 2006-2030	0.84%	0.60%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	102	4.4
2015	100	4.3
2020	97	4.1
2025	95	4.0
2030	93	3.8
Percent change 2006-2030	-10.1%	-15.1%
Annualized change 2006-2030	-0.44%	-0.68%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	143	6.2
2015	143	6.1
2020	143	6.0
2025	140	5.8
2030	136	5.7
Percent change 2006-2030	-3.9%	-9.2%
Annualized change 2006-2030	-0.17%	-0.40%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	927	40.1
2015	967	41.2
2020	988	41.6
2025	999	41.6
2030	1,010	41.8
Percent change 2006-2030	14.8%	8.4%
Annualized change 2006-2030	0.58%	0.34%

Hudson Valley Supply Scenario 2a: NP/PA High Growth (Supply Responsive to Demand)

Figure 229 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,769	379.6
2015	9,218	393.2
2020	9,535	401.1
2025	9,754	406.1
2030	9,927	411.0
Percent change 2006-2030	20.0%	13.3%
Annualized change 2006-2030	0.76%	0.52%

Figure 230 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,998	129.8	2010	5,771	249.9
2015	3,162	134.9	2015	6,056	258.3
2020	3,280	138.0	2020	6,255	263.1
2025	3,359	139.8	2025	6,395	266.3
2030	3,410	141.2	2030	6,517	269.8
Percent change 2006-2030	22.3%	15.6%	Percent change 2006-2030	18.8%	12.2%
Annualized change 2006-2030	0.84%	0.60%	Annualized change 2006-2030	0.72%	0.48%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 231 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,998	129.8	2010	596	25.8
2015	3,162	134.9	2015	634	27.0
2020	3,280	138.0	2020	657	27.6
2025	3,359	139.8	2025	666	27.7
2030	3,410	141.2	2030	666	27.6
Percent change 2006-2030	22.3%	15.6%	Percent change 2006-2030	19.4%	12.8%
Annualized change 2006-2030	0.84%	0.60%	Annualized change 2006-2030	0.74%	0.50%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,672	72.4	2010	730	31.6
2015	1,755	74.9	2015	773	33.0
2020	1,805	76.0	2020	818	34.4
2025	1,833	76.3	2025	860	35.8
2030	1,844	76.3	2030	900	37.3
Percent change 2006-2030	19.7%	13.1%	Percent change 2006-2030	30.6%	23.4%
Annualized change 2006-2030	0.75%	0.51%	Annualized change 2006-2030	1.12%	0.88%

Non-Primary Care Specialties

Figure 232 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	240	10.4
2015	263	11.2
2020	281	11.8
2025	297	12.4
2030	313	13.0
Percent change 2006-2030	39.9%	32.1%
Annualized change 2006-2030	1.41%	1.17%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	969	42.0
2015	1,085	46.3
2020	1,185	49.9
2025	1,274	53.0
2030	1,356	56.1
Percent change 2006-2030	53.1%	44.6%
Annualized change 2006-2030	1.79%	1.55%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	425	18.4
2015	445	19.0
2020	458	19.3
2025	463	19.3
2030	467	19.3
Percent change 2006-2030	15.7%	9.3%
Annualized change 2006-2030	0.61%	0.37%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	166	7.2
2015	160	6.8
2020	154	6.5
2025	146	6.1
2030	138	5.7
Percent change 2006-2030	-18.8%	-23.3%
Annualized change 2006-2030	-0.86%	-1.10%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	839	36.3
2015	836	35.7
2020	811	34.1
2025	781	32.5
2030	756	31.3
Percent change 2006-2030	-9.7%	-14.7%
Annualized change 2006-2030	-0.42%	-0.66%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	445	19.3
2015	456	19.5
2020	480	20.2
2025	495	20.6
2030	504	20.9
Percent change 2006-2030	19.7%	13.1%
Annualized change 2006-2030	0.75%	0.51%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	396	17.2
2015	423	18.1
2020	441	18.6
2025	455	19.0
2030	468	19.4
Percent change 2006-2030	28.9%	21.7%
Annualized change 2006-2030	1.06%	0.82%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	271	11.7
2015	311	13.3
2020	349	14.7
2025	382	15.9
2030	412	17.0
Percent change 2006-2030	70.8%	61.3%
Annualized change 2006-2030	2.26%	2.01%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	287	12.4
2015	306	13.1
2020	317	13.3
2025	329	13.7
2030	339	14.0
Percent change 2006-2030	26.3%	19.3%
Annualized change 2006-2030	0.98%	0.74%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	246	10.6
2015	240	10.3
2020	233	9.8
2025	223	9.3
2030	216	8.9
Percent change 2006-2030	-12.7%	-17.6%
Annualized change 2006-2030	-0.57%	-0.80%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	105	4.6
2015	107	4.6
2020	107	4.5
2025	106	4.4
2030	104	4.3
Percent change 2006-2030	0.7%	-4.8%
Annualized change 2006-2030	0.03%	-0.21%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	209	9.1
2015	219	9.3
2020	227	9.5
2025	233	9.7
2030	239	9.9
Percent change 2006-2030	20.7%	14.0%
Annualized change 2006-2030	0.79%	0.55%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	102	4.4
2015	99	4.2
2020	96	4.0
2025	93	3.9
2030	90	3.7
Percent change 2006-2030	-12.5%	-17.4%
Annualized change 2006-2030	-0.56%	-0.79%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	144	6.2
2015	143	6.1
2020	140	5.9
2025	138	5.7
2030	133	5.5
Percent change 2006-2030	-6.2%	-11.4%
Annualized change 2006-2030	-0.27%	-0.50%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	928	40.2
2015	962	41.0
2020	976	41.1
2025	980	40.8
2030	983	40.7
Percent change 2006-2030	11.7%	5.5%
Annualized change 2006-2030	0.46%	0.22%

Hudson Valley Supply Scenario 2b: NP/PA Lower Growth (Supply Not Responsive to Demand)

Figure 233 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,711	377.2
2015	9,078	387.2
2020	9,324	392.2
2025	9,470	394.3
2030	9,577	396.5
Percent change 2006-2030	15.8%	9.3%
Annualized change 2006-2030	0.61%	0.37%

Figure 234 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,969	128.6	2010	5,742	248.6
2015	3,079	131.3	2015	5,999	255.9
2020	3,140	132.1	2020	6,184	260.1
2025	3,158	131.5	2025	6,312	262.8
2030	3,155	130.6	2030	6,422	265.9
Percent change 2006-2030	13.2%	7.0%	Percent change 2006-2030	17.0%	10.6%
Annualized change 2006-2030	0.52%	0.28%	Annualized change 2006-2030	0.66%	0.42%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 235 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,969	128.6	2010	586	25.4
2015	3,079	131.3	2015	608	25.9
2020	3,140	132.1	2020	615	25.9
2025	3,158	131.5	2025	609	25.4
2030	3,155	130.6	2030	595	24.7
Percent change 2006-2030	13.2%	7.0%	Percent change 2006-2030	6.7%	0.8%
Annualized change 2006-2030	0.52%	0.28%	Annualized change 2006-2030	0.27%	0.03%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,653	71.6	2010	731	31.7
2015	1,708	72.8	2015	763	32.6
2020	1,736	73.0	2020	789	33.2
2025	1,739	72.4	2025	810	33.7
2030	1,729	71.6	2030	831	34.4
Percent change 2006-2030	12.3%	6.1%	Percent change 2006-2030	20.6%	13.9%
Annualized change 2006-2030	0.48%	0.25%	Annualized change 2006-2030	0.78%	0.54%

Non-Primary Care Specialties

Figure 236 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	238	10.3
2015	260	11.1
2020	279	11.8
2025	295	12.3
2030	311	12.9
Percent change 2006-2030	38.9%	31.2%
Annualized change 2006-2030	1.38%	1.14%

Obstetrics and Gynecology

Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	422	18.3
2015	438	18.7
2020	446	18.8
2025	450	18.7
2030	450	18.6
Percent change 2006-2030	11.5%	5.3%
Annualized change 2006-2030	0.45%	0.21%

Psychiatry

Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	838	36.3
2015	834	35.6
2020	808	34.0
2025	779	32.4
2030	754	31.2
Percent change 2006-2030	-9.9%	-14.9%
Annualized change 2006-2030	-0.43%	-0.67%

Radiology

Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	394	17.0
2015	418	17.8
2020	434	18.3
2025	447	18.6
2030	458	19.0
Percent change 2006-2030	26.2%	19.2%
Annualized change 2006-2030	0.97%	0.73%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	286	12.4
2015	303	12.9
2020	313	13.2
2025	324	13.5
2030	333	13.8
Percent change 2006-2030	24.4%	17.5%
Annualized change 2006-2030	0.91%	0.67%

Other Internal Medicine Subspecialties

Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	964	41.8
2015	1,077	46.0
2020	1,179	49.6
2025	1,267	52.7
2030	1,350	55.9
Percent change 2006-2030	52.3%	43.9%
Annualized change 2006-2030	1.77%	1.53%

Pathology

Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	164	7.1
2015	158	6.7
2020	151	6.3
2025	143	6.0
2030	135	5.6
Percent change 2006-2030	-20.5%	-24.9%
Annualized change 2006-2030	-0.95%	-1.19%

Anesthesiology

Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	443	19.2
2015	451	19.2
2020	473	19.9
2025	487	20.3
2030	494	20.4
Percent change 2006-2030	17.3%	10.8%
Annualized change 2006-2030	0.67%	0.43%

Emergency Medicine

Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	269	11.7
2015	308	13.1
2020	343	14.4
2025	375	15.6
2030	402	16.6
Percent change 2006-2030	66.8%	57.5%
Annualized change 2006-2030	2.15%	1.91%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	244	10.6
2015	238	10.1
2020	230	9.7
2025	220	9.2
2030	212	8.8
Percent change 2006-2030	-14.0%	-18.8%
Annualized change 2006-2030	-0.63%	-0.86%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	105	4.5
2015	107	4.5
2020	106	4.4
2025	105	4.4
2030	103	4.2
Percent change 2006-2030	-0.3%	-5.9%
Annualized change 2006-2030	-0.01%	-0.25%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	208	9.0
2015	215	9.2
2020	222	9.3
2025	227	9.4
2030	232	9.6
Percent change 2006-2030	17.1%	10.6%
Annualized change 2006-2030	0.66%	0.42%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	102	4.4
2015	98	4.2
2020	95	4.0
2025	92	3.8
2030	89	3.7
Percent change 2006-2030	-13.8%	-18.6%
Annualized change 2006-2030	-0.62%	-0.85%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	143	6.2
2015	141	6.0
2020	139	5.9
2025	135	5.6
2030	131	5.4
Percent change 2006-2030	-7.9%	-13.0%
Annualized change 2006-2030	-0.34%	-0.58%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	923	40.0
2015	953	40.6
2020	964	40.6
2025	966	40.2
2030	968	40.1
Percent change 2006-2030	10.0%	3.9%
Annualized change 2006-2030	0.40%	0.16%

Hudson Valley Supply Scenario 2b: NP/PA Lower Growth (Supply Responsive to Demand)

Figure 237 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,720	377.6
2015	9,050	386.0
2020	9,248	389.0
2025	9,348	389.2
2030	9,404	389.3
Percent change 2006-2030	13.7%	7.4%
Annualized change 2006-2030	0.53%	0.30%

Figure 238 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,975	128.8	2010	5,746	248.8
2015	3,082	131.4	2015	5,968	254.6
2020	3,143	132.2	2020	6,105	256.8
2025	3,163	131.7	2025	6,185	257.5
2030	3,157	130.7	2030	6,247	258.6
Percent change 2006-2030	13.3%	7.0%	Percent change 2006-2030	13.8%	7.5%
Annualized change 2006-2030	0.52%	0.28%	Annualized change 2006-2030	0.54%	0.30%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 239 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,975	128.8	2010	591	25.6
2015	3,082	131.4	2015	618	26.3
2020	3,143	132.2	2020	629	26.5
2025	3,163	131.7	2025	627	26.1
2030	3,157	130.7	2030	617	25.5
Percent change 2006-2030	13.3%	7.0%	Percent change 2006-2030	10.6%	4.4%
Annualized change 2006-2030	0.52%	0.28%	Annualized change 2006-2030	0.42%	0.18%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,660	71.9	2010	724	31.4
2015	1,710	73.0	2015	754	32.1
2020	1,730	72.8	2020	784	33.0
2025	1,726	71.9	2025	810	33.7
2030	1,707	70.7	2030	833	34.5
Percent change 2006-2030	10.8%	4.7%	Percent change 2006-2030	20.9%	14.2%
Annualized change 2006-2030	0.43%	0.19%	Annualized change 2006-2030	0.79%	0.56%

Non-Primary Care Specialties

Figure 240 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	239	10.3
2015	259	11.0
2020	274	11.5
2025	287	12.0
2030	300	12.4
Percent change 2006-2030	34.1%	26.6%
Annualized change 2006-2030	1.23%	0.99%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	965	41.8
2015	1,069	45.6
2020	1,157	48.7
2025	1,232	51.3
2030	1,300	53.8
Percent change 2006-2030	46.7%	38.6%
Annualized change 2006-2030	1.61%	1.37%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	423	18.3
2015	439	18.7
2020	447	18.8
2025	448	18.7
2030	448	18.5
Percent change 2006-2030	10.9%	4.7%
Annualized change 2006-2030	0.43%	0.19%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	165	7.1
2015	158	6.7
2020	150	6.3
2025	141	5.9
2030	132	5.5
Percent change 2006-2030	-22.2%	-26.5%
Annualized change 2006-2030	-1.04%	-1.27%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	835	36.2
2015	824	35.1
2020	792	33.3
2025	755	31.4
2030	724	30.0
Percent change 2006-2030	-13.4%	-18.2%
Annualized change 2006-2030	-0.60%	-0.84%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	443	19.2
2015	450	19.2
2020	468	19.7
2025	479	19.9
2030	483	20.0
Percent change 2006-2030	14.7%	8.4%
Annualized change 2006-2030	0.57%	0.34%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	394	17.1
2015	417	17.8
2020	431	18.1
2025	440	18.3
2030	448	18.6
Percent change 2006-2030	23.5%	16.7%
Annualized change 2006-2030	0.88%	0.64%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	269	11.7
2015	306	13.1
2020	341	14.3
2025	370	15.4
2030	395	16.3
Percent change 2006-2030	63.7%	54.6%
Annualized change 2006-2030	2.07%	1.83%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	286	12.4
2015	302	12.9
2020	309	13.0
2025	318	13.2
2030	325	13.4
Percent change 2006-2030	21.1%	14.4%
Annualized change 2006-2030	0.80%	0.56%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	245	10.6
2015	237	10.1
2020	227	9.6
2025	216	9.0
2030	207	8.6
Percent change 2006-2030	-16.4%	-21.0%
Annualized change 2006-2030	-0.74%	-0.98%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	105	4.5
2015	106	4.5
2020	105	4.4
2025	103	4.3
2030	99	4.1
Percent change 2006-2030	-3.4%	-8.8%
Annualized change 2006-2030	-0.15%	-0.38%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	208	9.0
2015	215	9.2
2020	221	9.3
2025	225	9.4
2030	229	9.5
Percent change 2006-2030	15.7%	9.3%
Annualized change 2006-2030	0.61%	0.37%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	102	4.4
2015	98	4.2
2020	93	3.9
2025	90	3.7
2030	86	3.6
Percent change 2006-2030	-16.2%	-20.8%
Annualized change 2006-2030	-0.73%	-0.97%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	143	6.2
2015	141	6.0
2020	137	5.8
2025	133	5.5
2030	128	5.3
Percent change 2006-2030	-10.1%	-15.1%
Annualized change 2006-2030	-0.44%	-0.68%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	924	40.0
2015	948	40.5
2020	953	40.1
2025	948	39.5
2030	942	39.0
Percent change 2006-2030	7.1%	1.2%
Annualized change 2006-2030	0.29%	0.05%

Hudson Valley Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 241 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,580	371.5
2015	8,884	378.9
2020	9,071	381.6
2025	9,162	381.5
2030	9,197	380.7
Percent change 2006-2030	11.2%	5.0%
Annualized change 2006-2030	0.44%	0.20%

Figure 242 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,911	126.1	2010	5,668	245.4
2015	2,995	127.7	2015	5,889	251.2
2020	3,032	127.5	2020	6,039	254.1
2025	3,028	126.1	2025	6,134	255.4
2030	2,995	124.0	2030	6,201	256.7
Percent change 2006-2030	7.5%	1.5%	Percent change 2006-2030	13.0%	6.8%
Annualized change 2006-2030	0.30%	0.06%	Annualized change 2006-2030	0.51%	0.27%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 243– Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,911	126.1	2010	574	24.9
2015	2,995	127.7	2015	591	25.2
2020	3,032	127.5	2020	594	25.0
2025	3,028	126.1	2025	584	24.3
2030	2,995	124.0	2030	565	23.4
Percent change 2006-2030	7.5%	1.5%	Percent change 2006-2030	1.3%	-4.3%
Annualized change 2006-2030	0.30%	0.06%	Annualized change 2006-2030	0.05%	-0.18%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,620	70.2	2010	717	31.0
2015	1,661	70.9	2015	743	31.7
2020	1,676	70.5	2020	762	32.1
2025	1,667	69.4	2025	776	32.3
2030	1,641	68.0	2030	788	32.6
Percent change 2006-2030	6.6%	0.7%	Percent change 2006-2030	14.4%	8.1%
Annualized change 2006-2030	0.27%	0.03%	Annualized change 2006-2030	0.56%	0.33%

Non-Primary Care Specialties

Figure 244 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	235	10.2
2015	256	10.9
2020	273	11.5
2025	287	11.9
2030	300	12.4
Percent change 2006-2030	34.2%	26.7%
Annualized change 2006-2030	1.23%	0.99%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	952	41.2
2015	1,058	45.1
2020	1,152	48.5
2025	1,231	51.2
2030	1,303	54.0
Percent change 2006-2030	47.1%	39.0%
Annualized change 2006-2030	1.62%	1.38%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	416	18.0
2015	430	18.3
2020	436	18.3
2025	437	18.2
2030	435	18.0
Percent change 2006-2030	7.6%	1.7%
Annualized change 2006-2030	0.31%	0.07%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	162	7.0
2015	155	6.6
2020	147	6.2
2025	139	5.8
2030	130	5.4
Percent change 2006-2030	-23.2%	-27.5%
Annualized change 2006-2030	-1.10%	-1.33%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	827	35.8
2015	818	34.9
2020	789	33.2
2025	757	31.5
2030	728	30.1
Percent change 2006-2030	-13.0%	-17.8%
Annualized change 2006-2030	-0.58%	-0.81%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	437	18.9
2015	443	18.9
2020	462	19.4
2025	473	19.7
2030	477	19.7
Percent change 2006-2030	13.2%	7.0%
Annualized change 2006-2030	0.52%	0.28%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	389	16.8
2015	410	17.5
2020	424	17.8
2025	434	18.1
2030	442	18.3
Percent change 2006-2030	21.8%	15.1%
Annualized change 2006-2030	0.83%	0.59%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	266	11.5
2015	302	12.9
2020	335	14.1
2025	364	15.2
2030	388	16.1
Percent change 2006-2030	61.0%	52.1%
Annualized change 2006-2030	2.01%	1.76%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	282	12.2
2015	297	12.7
2020	306	12.9
2025	315	13.1
2030	322	13.3
Percent change 2006-2030	20.1%	13.4%
Annualized change 2006-2030	0.77%	0.53%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	241	10.4
2015	233	10.0
2020	225	9.5
2025	214	8.9
2030	205	8.5
Percent change 2006-2030	-17.0%	-21.6%
Annualized change 2006-2030	-0.77%	-1.01%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	103	4.5
2015	105	4.5
2020	103	4.3
2025	102	4.3
2030	99	4.1
Percent change 2006-2030	-3.8%	-9.1%
Annualized change 2006-2030	-0.16%	-0.40%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	205	8.9
2015	211	9.0
2020	217	9.1
2025	220	9.2
2030	224	9.3
Percent change 2006-2030	13.1%	6.8%
Annualized change 2006-2030	0.51%	0.27%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	97	4.1
2020	93	3.9
2025	89	3.7
2030	86	3.5
Percent change 2006-2030	-16.8%	-21.4%
Annualized change 2006-2030	-0.76%	-1.00%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	141	6.1
2015	138	5.9
2020	136	5.7
2025	132	5.5
2030	126	5.2
Percent change 2006-2030	-11.0%	-16.0%
Annualized change 2006-2030	-0.49%	-0.72%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	911	39.4
2015	936	39.9
2020	942	39.6
2025	939	39.1
2030	935	38.7
Percent change 2006-2030	6.3%	0.4%
Annualized change 2006-2030	0.25%	0.02%

Hudson Valley Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 245 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,606	372.6
2015	8,899	379.6
2020	9,063	381.3
2025	9,133	380.2
2030	9,138	378.3
Percent change 2006-2030	10.4%	4.3%
Annualized change 2006-2030	0.41%	0.18%

Figure 246 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,917	126.3	2010	5,689	246.3
2015	2,997	127.8	2015	5,902	251.7
2020	3,033	127.6	2020	6,030	253.7
2025	3,030	126.2	2025	6,103	254.1
2030	2,992	123.9	2030	6,146	254.4
Percent change 2006-2030	7.4%	1.4%	Percent change 2006-2030	12.0%	5.8%
Annualized change 2006-2030	0.30%	0.06%	Annualized change 2006-2030	0.47%	0.24%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 247– Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,917	126.3	2010	580	25.1
2015	2,997	127.8	2015	601	25.6
2020	3,033	127.6	2020	607	25.5
2025	3,030	126.2	2025	601	25.0
2030	2,992	123.9	2030	585	24.2
Percent change 2006-2030	7.4%	1.4%	Percent change 2006-2030	4.8%	-1.0%
Annualized change 2006-2030	0.30%	0.06%	Annualized change 2006-2030	0.20%	-0.04%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,627	70.5	2010	710	30.7
2015	1,663	70.9	2015	733	31.3
2020	1,670	70.2	2020	756	31.8
2025	1,653	68.8	2025	776	32.3
2030	1,618	67.0	2030	790	32.7
Percent change 2006-2030	5.1%	-0.7%	Percent change 2006-2030	14.6%	8.3%
Annualized change 2006-2030	0.21%	-0.03%	Annualized change 2006-2030	0.57%	0.33%

Non-Primary Care Specialties

Figure 248 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	236	10.2
2015	256	10.9
2020	271	11.4
2025	284	11.8
2030	295	12.2
Percent change 2006-2030	31.9%	24.6%
Annualized change 2006-2030	1.16%	0.92%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	955	41.4
2015	1,057	45.1
2020	1,143	48.1
2025	1,215	50.6
2030	1,279	52.9
Percent change 2006-2030	44.4%	36.4%
Annualized change 2006-2030	1.54%	1.30%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	419	18.1
2015	434	18.5
2020	442	18.6
2025	442	18.4
2030	441	18.2
Percent change 2006-2030	9.1%	3.0%
Annualized change 2006-2030	0.36%	0.12%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	163	7.1
2015	156	6.7
2020	148	6.2
2025	139	5.8
2030	130	5.4
Percent change 2006-2030	-23.4%	-27.7%
Annualized change 2006-2030	-1.11%	-1.34%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	827	35.8
2015	815	34.7
2020	782	32.9
2025	745	31.0
2030	713	29.5
Percent change 2006-2030	-14.8%	-19.6%
Annualized change 2006-2030	-0.67%	-0.90%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	439	19.0
2015	445	19.0
2020	462	19.5
2025	473	19.7
2030	475	19.7
Percent change 2006-2030	12.9%	6.6%
Annualized change 2006-2030	0.51%	0.27%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	391	16.9
2015	413	17.6
2020	426	17.9
2025	435	18.1
2030	441	18.3
Percent change 2006-2030	21.5%	14.8%
Annualized change 2006-2030	0.82%	0.58%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	267	11.5
2015	303	12.9
2020	336	14.1
2025	365	15.2
2030	388	16.1
Percent change 2006-2030	61.1%	52.1%
Annualized change 2006-2030	2.01%	1.76%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	283	12.2
2015	298	12.7
2020	305	12.8
2025	314	13.1
2030	319	13.2
Percent change 2006-2030	19.1%	12.5%
Annualized change 2006-2030	0.73%	0.49%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	242	10.5
2015	234	10.0
2020	224	9.4
2025	213	8.9
2030	203	8.4
Percent change 2006-2030	-17.7%	-22.3%
Annualized change 2006-2030	-0.81%	-1.04%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	104	4.5
2015	105	4.5
2020	103	4.3
2025	102	4.2
2030	98	4.1
Percent change 2006-2030	-5.0%	-10.3%
Annualized change 2006-2030	-0.21%	-0.45%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	206	8.9
2015	213	9.1
2020	218	9.2
2025	222	9.2
2030	225	9.3
Percent change 2006-2030	13.8%	7.5%
Annualized change 2006-2030	0.54%	0.30%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	101	4.4
2015	97	4.1
2020	92	3.9
2025	88	3.7
2030	85	3.5
Percent change 2006-2030	-17.5%	-22.1%
Annualized change 2006-2030	-0.80%	-1.04%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	142	6.1
2015	139	5.9
2020	135	5.7
2025	131	5.5
2030	126	5.2
Percent change 2006-2030	-11.6%	-16.5%
Annualized change 2006-2030	-0.51%	-0.75%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	915	39.6
2015	938	40.0
2020	941	39.6
2025	935	38.9
2030	927	38.4
Percent change 2006-2030	5.4%	-0.5%
Annualized change 2006-2030	0.22%	-0.02%

Hudson Valley Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 249 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,580	371.5
2015	8,884	378.9
2020	9,071	381.6
2025	9,162	381.5
2030	9,197	380.7
Percent change 2006-2030	11.2%	5.0%
Annualized change 2006-2030	0.44%	0.20%

Figure 250 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,911	126.0	2010	5,669	245.5
2015	2,989	127.5	2015	5,895	251.4
2020	3,022	127.1	2020	6,049	254.5
2025	3,014	125.5	2025	6,149	256.0
2030	2,977	123.2	2030	6,220	257.5
Percent change 2006-2030	6.8%	0.9%	Percent change 2006-2030	13.4%	7.1%
Annualized change 2006-2030	0.28%	0.04%	Annualized change 2006-2030	0.52%	0.29%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 251– Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,911	126.0	2010	574	24.9
2015	2,989	127.5	2015	590	25.2
2020	3,022	127.1	2020	592	24.9
2025	3,014	125.5	2025	582	24.2
2030	2,977	123.2	2030	562	23.3
Percent change 2006-2030	6.8%	0.9%	Percent change 2006-2030	0.7%	-4.9%
Annualized change 2006-2030	0.28%	0.04%	Annualized change 2006-2030	0.03%	-0.21%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,620	70.1	2010	717	31.0
2015	1,658	70.7	2015	741	31.6
2020	1,670	70.3	2020	760	32.0
2025	1,659	69.1	2025	773	32.2
2030	1,632	67.5	2030	784	32.4
Percent change 2006-2030	5.9%	0.1%	Percent change 2006-2030	13.7%	7.4%
Annualized change 2006-2030	0.24%	0.00%	Annualized change 2006-2030	0.54%	0.30%

Non-Primary Care Specialties

Figure 252 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	235	10.2
2015	256	10.9
2020	273	11.5
2025	287	12.0
2030	301	12.5
Percent change 2006-2030	34.5%	27.1%
Annualized change 2006-2030	1.24%	1.00%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	952	41.2
2015	1,059	45.2
2020	1,154	48.5
2025	1,234	51.4
2030	1,307	54.1
Percent change 2006-2030	47.5%	39.4%
Annualized change 2006-2030	1.63%	1.39%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	416	18.0
2015	430	18.3
2020	437	18.4
2025	438	18.2
2030	436	18.1
Percent change 2006-2030	7.9%	2.0%
Annualized change 2006-2030	0.32%	0.08%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	162	7.0
2015	155	6.6
2020	148	6.2
2025	140	5.8
2030	131	5.4
Percent change 2006-2030	-23.0%	-27.3%
Annualized change 2006-2030	-1.08%	-1.32%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	827	35.8
2015	819	34.9
2020	791	33.3
2025	759	31.6
2030	730	30.2
Percent change 2006-2030	-12.7%	-17.6%
Annualized change 2006-2030	-0.57%	-0.80%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	437	18.9
2015	443	18.9
2020	462	19.5
2025	474	19.7
2030	478	19.8
Percent change 2006-2030	13.6%	7.3%
Annualized change 2006-2030	0.53%	0.29%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	389	16.8
2015	411	17.5
2020	425	17.9
2025	435	18.1
2030	444	18.4
Percent change 2006-2030	22.2%	15.4%
Annualized change 2006-2030	0.84%	0.60%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	266	11.5
2015	303	12.9
2020	336	14.1
2025	365	15.2
2030	389	16.1
Percent change 2006-2030	61.5%	52.6%
Annualized change 2006-2030	2.02%	1.78%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	282	12.2
2015	298	12.7
2020	307	12.9
2025	316	13.1
2030	323	13.4
Percent change 2006-2030	20.4%	13.8%
Annualized change 2006-2030	0.78%	0.54%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	241	10.4
2015	234	10.0
2020	225	9.5
2025	215	8.9
2030	206	8.5
Percent change 2006-2030	-16.7%	-21.3%
Annualized change 2006-2030	-0.76%	-0.99%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	103	4.5
2015	105	4.5
2020	103	4.3
2025	103	4.3
2030	99	4.1
Percent change 2006-2030	-3.5%	-8.8%
Annualized change 2006-2030	-0.15%	-0.38%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	205	8.9
2015	212	9.0
2020	217	9.1
2025	221	9.2
2030	225	9.3
Percent change 2006-2030	13.4%	7.1%
Annualized change 2006-2030	0.52%	0.29%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	97	4.1
2020	93	3.9
2025	89	3.7
2030	86	3.6
Percent change 2006-2030	-16.6%	-21.2%
Annualized change 2006-2030	-0.75%	-0.99%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	141	6.1
2015	139	5.9
2020	136	5.7
2025	132	5.5
2030	127	5.2
Percent change 2006-2030	-10.8%	-15.7%
Annualized change 2006-2030	-0.47%	-0.71%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	911	39.5
2015	936	39.9
2020	943	39.7
2025	941	39.2
2030	938	38.8
Percent change 2006-2030	6.6%	0.7%
Annualized change 2006-2030	0.27%	0.03%

Hudson Valley Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 253 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,606	372.6
2015	8,899	379.6
2020	9,063	381.3
2025	9,133	380.2
2030	9,138	378.3
Percent change 2006-2030	10.4%	4.3%
Annualized change 2006-2030	0.41%	0.18%

Figure 254 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,916	126.3	2010	5,690	246.4
2015	2,991	127.6	2015	5,907	252.0
2020	3,023	127.2	2020	6,040	254.1
2025	3,016	125.6	2025	6,117	254.7
2030	2,975	123.1	2030	6,163	255.2
Percent change 2006-2030	6.7%	0.8%	Percent change 2006-2030	12.3%	6.1%
Annualized change 2006-2030	0.27%	0.03%	Annualized change 2006-2030	0.49%	0.25%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 255– Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,916	126.3	2010	579	25.1
2015	2,991	127.6	2015	600	25.6
2020	3,023	127.2	2020	605	25.5
2025	3,016	125.6	2025	598	24.9
2030	2,975	123.1	2030	581	24.1
Percent change 2006-2030	6.7%	0.8%	Percent change 2006-2030	4.2%	-1.6%
Annualized change 2006-2030	0.27%	0.03%	Annualized change 2006-2030	0.17%	-0.07%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,627	70.4	2010	710	30.7
2015	1,660	70.8	2015	731	31.2
2020	1,664	70.0	2020	754	31.7
2025	1,646	68.5	2025	772	32.2
2030	1,608	66.6	2030	785	32.5
Percent change 2006-2030	4.4%	-1.3%	Percent change 2006-2030	13.9%	7.6%
Annualized change 2006-2030	0.18%	-0.06%	Annualized change 2006-2030	0.55%	0.31%

Non-Primary Care Specialties

Figure 256 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	236	10.2
2015	256	10.9
2020	271	11.4
2025	284	11.8
2030	296	12.3
Percent change 2006-2030	32.3%	25.0%
Annualized change 2006-2030	1.17%	0.93%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	956	41.4
2015	1,058	45.1
2020	1,145	48.2
2025	1,218	50.7
2030	1,283	53.1
Percent change 2006-2030	44.8%	36.8%
Annualized change 2006-2030	1.55%	1.31%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	419	18.1
2015	434	18.5
2020	443	18.6
2025	443	18.4
2030	442	18.3
Percent change 2006-2030	9.4%	3.3%
Annualized change 2006-2030	0.37%	0.14%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	163	7.1
2015	156	6.7
2020	148	6.2
2025	139	5.8
2030	131	5.4
Percent change 2006-2030	-23.2%	-27.5%
Annualized change 2006-2030	-1.10%	-1.33%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	827	35.8
2015	815	34.8
2020	783	33.0
2025	747	31.1
2030	715	29.6
Percent change 2006-2030	-14.6%	-19.3%
Annualized change 2006-2030	-0.66%	-0.89%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	439	19.0
2015	445	19.0
2020	463	19.5
2025	474	19.7
2030	477	19.7
Percent change 2006-2030	13.2%	6.9%
Annualized change 2006-2030	0.52%	0.28%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	391	16.9
2015	413	17.6
2020	426	17.9
2025	436	18.1
2030	442	18.3
Percent change 2006-2030	21.9%	15.1%
Annualized change 2006-2030	0.83%	0.59%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	267	11.5
2015	303	12.9
2020	337	14.2
2025	366	15.2
2030	389	16.1
Percent change 2006-2030	61.5%	52.6%
Annualized change 2006-2030	2.02%	1.78%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	283	12.2
2015	299	12.7
2020	306	12.9
2025	314	13.1
2030	320	13.3
Percent change 2006-2030	19.5%	12.9%
Annualized change 2006-2030	0.74%	0.51%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	242	10.5
2015	235	10.0
2020	225	9.5
2025	214	8.9
2030	204	8.4
Percent change 2006-2030	-17.5%	-22.0%
Annualized change 2006-2030	-0.80%	-1.03%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	104	4.5
2015	105	4.5
2020	103	4.4
2025	102	4.2
2030	98	4.1
Percent change 2006-2030	-4.7%	-10.0%
Annualized change 2006-2030	-0.20%	-0.44%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	206	8.9
2015	213	9.1
2020	219	9.2
2025	222	9.3
2030	226	9.4
Percent change 2006-2030	14.1%	7.8%
Annualized change 2006-2030	0.55%	0.31%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	101	4.4
2015	97	4.1
2020	92	3.9
2025	89	3.7
2030	85	3.5
Percent change 2006-2030	-17.3%	-21.9%
Annualized change 2006-2030	-0.79%	-1.02%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	142	6.1
2015	139	5.9
2020	136	5.7
2025	132	5.5
2030	126	5.2
Percent change 2006-2030	-11.3%	-16.2%
Annualized change 2006-2030	-0.50%	-0.74%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	915	39.6
2015	939	40.0
2020	943	39.7
2025	937	39.0
2030	930	38.5
Percent change 2006-2030	5.7%	-0.2%
Annualized change 2006-2030	0.23%	-0.01%

Hudson Valley Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 257 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,580	371.5
2015	8,884	378.9
2020	9,071	381.6
2025	9,162	381.5
2030	9,197	380.7
Percent change 2006-2030	11.2%	5.0%
Annualized change 2006-2030	0.44%	0.20%

Figure 258 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,910	126.0	2010	5,670	245.5
2015	2,986	127.4	2015	5,898	251.6
2020	3,016	126.9	2020	6,055	254.7
2025	3,005	125.1	2025	6,157	256.4
2030	2,966	122.8	2030	6,231	257.9
Percent change 2006-2030	6.4%	0.5%	Percent change 2006-2030	13.6%	7.3%
Annualized change 2006-2030	0.26%	0.02%	Annualized change 2006-2030	0.53%	0.29%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 259 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,910	126.0	2010	574	24.8
2015	2,986	127.4	2015	589	25.1
2020	3,016	126.9	2020	590	24.8
2025	3,005	125.1	2025	580	24.1
2030	2,966	122.8	2030	560	23.2
Percent change 2006-2030	6.4%	0.5%	Percent change 2006-2030	0.3%	-5.2%
Annualized change 2006-2030	0.26%	0.02%	Annualized change 2006-2030	0.01%	-0.22%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,620	70.1	2010	716	31.0
2015	1,656	70.6	2015	740	31.6
2020	1,667	70.1	2020	758	31.9
2025	1,655	68.9	2025	770	32.1
2030	1,625	67.3	2030	781	32.3
Percent change 2006-2030	5.6%	-0.3%	Percent change 2006-2030	13.3%	7.1%
Annualized change 2006-2030	0.23%	-0.01%	Annualized change 2006-2030	0.52%	0.28%

Non-Primary Care Specialties

Figure 260 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	235	10.2
2015	256	10.9
2020	274	11.5
2025	288	12.0
2030	302	12.5
Percent change 2006-2030	34.8%	27.3%
Annualized change 2006-2030	1.25%	1.01%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	952	41.2
2015	1,059	45.2
2020	1,155	48.6
2025	1,236	51.4
2030	1,309	54.2
Percent change 2006-2030	47.8%	39.6%
Annualized change 2006-2030	1.64%	1.40%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	416	18.0
2015	430	18.4
2020	437	18.4
2025	438	18.3
2030	437	18.1
Percent change 2006-2030	8.1%	2.2%
Annualized change 2006-2030	0.33%	0.09%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	162	7.0
2015	155	6.6
2020	148	6.2
2025	140	5.8
2030	131	5.4
Percent change 2006-2030	-22.9%	-27.1%
Annualized change 2006-2030	-1.08%	-1.31%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	827	35.8
2015	820	35.0
2020	791	33.3
2025	760	31.6
2030	732	30.3
Percent change 2006-2030	-12.6%	-17.4%
Annualized change 2006-2030	-0.56%	-0.79%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	437	18.9
2015	443	18.9
2020	463	19.5
2025	475	19.8
2030	479	19.8
Percent change 2006-2030	13.8%	7.5%
Annualized change 2006-2030	0.54%	0.30%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	389	16.8
2015	411	17.5
2020	425	17.9
2025	436	18.2
2030	444	18.4
Percent change 2006-2030	22.4%	15.6%
Annualized change 2006-2030	0.85%	0.61%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	266	11.5
2015	303	12.9
2020	336	14.1
2025	366	15.2
2030	390	16.1
Percent change 2006-2030	61.8%	52.8%
Annualized change 2006-2030	2.03%	1.78%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	282	12.2
2015	298	12.7
2020	307	12.9
2025	316	13.2
2030	323	13.4
Percent change 2006-2030	20.7%	14.0%
Annualized change 2006-2030	0.79%	0.55%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	241	10.4
2015	234	10.0
2020	226	9.5
2025	215	8.9
2030	206	8.5
Percent change 2006-2030	-16.6%	-21.2%
Annualized change 2006-2030	-0.75%	-0.99%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	103	4.5
2015	105	4.5
2020	103	4.3
2025	103	4.3
2030	100	4.1
Percent change 2006-2030	-3.3%	-8.7%
Annualized change 2006-2030	-0.14%	-0.38%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	205	8.9
2015	212	9.0
2020	217	9.1
2025	221	9.2
2030	225	9.3
Percent change 2006-2030	13.6%	7.3%
Annualized change 2006-2030	0.53%	0.29%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	97	4.1
2020	93	3.9
2025	90	3.7
2030	86	3.6
Percent change 2006-2030	-16.4%	-21.0%
Annualized change 2006-2030	-0.74%	-0.98%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	141	6.1
2015	139	5.9
2020	136	5.7
2025	132	5.5
2030	127	5.3
Percent change 2006-2030	-10.6%	-15.6%
Annualized change 2006-2030	-0.47%	-0.70%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	911	39.5
2015	937	40.0
2020	944	39.7
2025	943	39.3
2030	939	38.9
Percent change 2006-2030	6.8%	0.8%
Annualized change 2006-2030	0.27%	0.04%

Hudson Valley Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 261 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,606	372.6
2015	8,899	379.6
2020	9,063	381.3
2025	9,133	380.2
2030	9,138	378.3
Percent change 2006-2030	10.4%	4.3%
Annualized change 2006-2030	0.41%	0.18%

Figure 262 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,916	126.2	2010	5,691	246.4
2015	2,988	127.5	2015	5,910	252.1
2020	3,017	126.9	2020	6,046	254.3
2025	3,007	125.2	2025	6,125	255.0
2030	2,964	122.7	2030	6,174	255.6
Percent change 2006-2030	6.3%	0.5%	Percent change 2006-2030	12.5%	6.3%
Annualized change 2006-2030	0.26%	0.02%	Annualized change 2006-2030	0.49%	0.25%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 263 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,916	126.2	2010	579	25.1
2015	2,988	127.5	2015	599	25.5
2020	3,017	126.9	2020	604	25.4
2025	3,007	125.2	2025	596	24.8
2030	2,964	122.7	2030	579	24.0
Percent change 2006-2030	6.3%	0.5%	Percent change 2006-2030	3.8%	-2.0%
Annualized change 2006-2030	0.26%	0.02%	Annualized change 2006-2030	0.16%	-0.08%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,627	70.4	2010	710	30.7
2015	1,658	70.7	2015	731	31.2
2020	1,661	69.9	2020	753	31.7
2025	1,641	68.3	2025	770	32.1
2030	1,603	66.3	2030	782	32.4
Percent change 2006-2030	4.1%	-1.7%	Percent change 2006-2030	13.5%	7.2%
Annualized change 2006-2030	0.17%	-0.07%	Annualized change 2006-2030	0.53%	0.29%

Non-Primary Care Specialties

Figure 263 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	236	10.2
2015	256	10.9
2020	272	11.4
2025	285	11.8
2030	297	12.3
Percent change 2006-2030	32.5%	25.2%
Annualized change 2006-2030	1.18%	0.94%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	956	41.4
2015	1,059	45.2
2020	1,146	48.2
2025	1,220	50.8
2030	1,285	53.2
Percent change 2006-2030	45.0%	37.0%
Annualized change 2006-2030	1.56%	1.32%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	419	18.1
2015	434	18.5
2020	443	18.6
2025	444	18.5
2030	443	18.3
Percent change 2006-2030	9.6%	3.5%
Annualized change 2006-2030	0.38%	0.14%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	163	7.1
2015	156	6.7
2020	148	6.2
2025	140	5.8
2030	131	5.4
Percent change 2006-2030	-23.1%	-27.3%
Annualized change 2006-2030	-1.09%	-1.32%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	827	35.8
2015	816	34.8
2020	784	33.0
2025	748	31.1
2030	716	29.6
Percent change 2006-2030	-14.5%	-19.2%
Annualized change 2006-2030	-0.65%	-0.88%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	439	19.0
2015	445	19.0
2020	464	19.5
2025	474	19.8
2030	477	19.8
Percent change 2006-2030	13.4%	7.1%
Annualized change 2006-2030	0.52%	0.29%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	391	16.9
2015	413	17.6
2020	427	17.9
2025	436	18.2
2030	443	18.3
Percent change 2006-2030	22.1%	15.3%
Annualized change 2006-2030	0.83%	0.60%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	267	11.5
2015	303	12.9
2020	337	14.2
2025	366	15.2
2030	390	16.1
Percent change 2006-2030	61.8%	52.8%
Annualized change 2006-2030	2.03%	1.78%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	283	12.2
2015	299	12.7
2020	306	12.9
2025	315	13.1
2030	321	13.3
Percent change 2006-2030	19.7%	13.1%
Annualized change 2006-2030	0.75%	0.51%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	242	10.5
2015	235	10.0
2020	225	9.5
2025	214	8.9
2030	204	8.5
Percent change 2006-2030	-17.3%	-21.9%
Annualized change 2006-2030	-0.79%	-1.02%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	104	4.5
2015	105	4.5
2020	104	4.4
2025	102	4.2
2030	98	4.1
Percent change 2006-2030	-4.6%	-9.8%
Annualized change 2006-2030	-0.19%	-0.43%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	206	8.9
2015	213	9.1
2020	219	9.2
2025	223	9.3
2030	226	9.4
Percent change 2006-2030	14.3%	8.0%
Annualized change 2006-2030	0.56%	0.32%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	101	4.4
2015	97	4.1
2020	92	3.9
2025	89	3.7
2030	85	3.5
Percent change 2006-2030	-17.1%	-21.7%
Annualized change 2006-2030	-0.78%	-1.02%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	142	6.1
2015	139	5.9
2020	136	5.7
2025	132	5.5
2030	126	5.2
Percent change 2006-2030	-11.2%	-16.1%
Annualized change 2006-2030	-0.49%	-0.73%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	915	39.6
2015	939	40.1
2020	944	39.7
2025	939	39.1
2030	931	38.6
Percent change 2006-2030	5.8%	0.0%
Annualized change 2006-2030	0.24%	0.00%

Hudson Valley Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 265 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,558	370.5
2015	8,753	373.3
2020	8,830	371.5
2025	8,812	366.9
2030	8,758	362.6
Percent change 2006-2030	5.9%	0.0%
Annualized change 2006-2030	0.24%	0.00%

Figure 266 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,904	125.7	2010	5,654	244.8
2015	2,951	125.9	2015	5,802	247.5
2020	2,952	124.2	2020	5,878	247.3
2025	2,911	121.2	2025	5,900	245.6
2030	2,849	118.0	2030	5,909	244.6
Percent change 2006-2030	2.2%	-3.4%	Percent change 2006-2030	7.7%	1.7%
Annualized change 2006-2030	0.09%	-0.15%	Annualized change 2006-2030	0.31%	0.07%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 267 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,904	125.7	2010	573	24.8
2015	2,951	125.9	2015	582	24.8
2020	2,952	124.2	2020	578	24.3
2025	2,911	121.2	2025	562	23.4
2030	2,849	118.0	2030	538	22.3
Percent change 2006-2030	2.2%	-3.4%	Percent change 2006-2030	-3.6%	-9.0%
Annualized change 2006-2030	0.09%	-0.15%	Annualized change 2006-2030	-0.15%	-0.39%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,616	70.0	2010	715	31.0
2015	1,637	69.8	2015	732	31.2
2020	1,632	68.6	2020	742	31.2
2025	1,603	66.7	2025	747	31.1
2030	1,561	64.6	2030	750	31.1
Percent change 2006-2030	1.4%	-4.2%	Percent change 2006-2030	8.9%	2.8%
Annualized change 2006-2030	0.06%	-0.18%	Annualized change 2006-2030	0.35%	0.12%

Non-Primary Care Specialties

Figure 268 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	234	10.1
2015	252	10.7
2020	266	11.2
2025	276	11.5
2030	286	11.9
Percent change 2006-2030	27.8%	20.8%
Annualized change 2006-2030	1.03%	0.79%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	950	41.1
2015	1,042	44.4
2020	1,121	47.2
2025	1,184	49.3
2030	1,242	51.4
Percent change 2006-2030	40.2%	32.4%
Annualized change 2006-2030	1.42%	1.18%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	415	18.0
2015	423	18.1
2020	424	17.8
2025	420	17.5
2030	414	17.2
Percent change 2006-2030	2.6%	-3.1%
Annualized change 2006-2030	0.11%	-0.13%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	162	7.0
2015	153	6.5
2020	143	6.0
2025	134	5.6
2030	124	5.1
Percent change 2006-2030	-26.9%	-30.9%
Annualized change 2006-2030	-1.29%	-1.53%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	825	35.7
2015	806	34.4
2020	768	32.3
2025	728	30.3
2030	694	28.7
Percent change 2006-2030	-17.1%	-21.7%
Annualized change 2006-2030	-0.78%	-1.01%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	436	18.9
2015	436	18.6
2020	449	18.9
2025	455	18.9
2030	454	18.8
Percent change 2006-2030	7.9%	1.9%
Annualized change 2006-2030	0.32%	0.08%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	388	16.8
2015	404	17.2
2020	413	17.4
2025	418	17.4
2030	421	17.4
Percent change 2006-2030	16.1%	9.7%
Annualized change 2006-2030	0.62%	0.39%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	265	11.5
2015	298	12.7
2020	326	13.7
2025	350	14.6
2030	370	15.3
Percent change 2006-2030	53.5%	45.0%
Annualized change 2006-2030	1.80%	1.56%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	281	12.2
2015	293	12.5
2020	298	12.5
2025	303	12.6
2030	307	12.7
Percent change 2006-2030	14.4%	8.1%
Annualized change 2006-2030	0.56%	0.33%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	240	10.4
2015	230	9.8
2020	219	9.2
2025	206	8.6
2030	195	8.1
Percent change 2006-2030	-20.9%	-25.3%
Annualized change 2006-2030	-0.97%	-1.21%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	103	4.5
2015	103	4.4
2020	100	4.2
2025	98	4.1
2030	94	3.9
Percent change 2006-2030	-8.3%	-13.4%
Annualized change 2006-2030	-0.36%	-0.60%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	205	8.9
2015	208	8.9
2020	211	8.9
2025	212	8.8
2030	213	8.8
Percent change 2006-2030	7.7%	1.8%
Annualized change 2006-2030	0.31%	0.07%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	95	4.1
2020	90	3.8
2025	86	3.6
2030	82	3.4
Percent change 2006-2030	-20.7%	-25.1%
Annualized change 2006-2030	-0.96%	-1.20%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	140	6.1
2015	136	5.8
2020	132	5.6
2025	127	5.3
2030	120	5.0
Percent change 2006-2030	-15.2%	-19.9%
Annualized change 2006-2030	-0.69%	-0.92%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	909	39.3
2015	922	39.3
2020	917	38.6
2025	903	37.6
2030	891	36.9
Percent change 2006-2030	1.2%	-4.4%
Annualized change 2006-2030	0.05%	-0.19%

Hudson Valley Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 269 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,585	371.7
2015	8,769	374.1
2020	8,827	371.3
2025	8,789	365.9
2030	8,708	360.5
Percent change 2006-2030	5.2%	-0.6%
Annualized change 2006-2030	0.21%	-0.02%

Figure 270 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,910	126.0	2010	5,675	245.7
2015	2,954	126.0	2015	5,816	248.1
2020	2,954	124.3	2020	5,872	247.0
2025	2,916	121.4	2025	5,873	244.5
2030	2,849	118.0	2030	5,859	242.5
Percent change 2006-2030	2.2%	-3.4%	Percent change 2006-2030	6.8%	0.9%
Annualized change 2006-2030	0.09%	-0.15%	Annualized change 2006-2030	0.27%	0.04%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 271 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,910	126.0	2010	578	25.0
2015	2,954	126.0	2015	592	25.3
2020	2,954	124.3	2020	591	24.9
2025	2,916	121.4	2025	578	24.1
2030	2,849	118.0	2030	557	23.0
Percent change 2006-2030	2.2%	-3.4%	Percent change 2006-2030	-0.2%	-5.7%
Annualized change 2006-2030	0.09%	-0.15%	Annualized change 2006-2030	-0.01%	-0.25%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,623	70.3	2010	708	30.7
2015	1,639	69.9	2015	722	30.8
2020	1,626	68.4	2020	737	31.0
2025	1,591	66.2	2025	747	31.1
2030	1,541	63.8	2030	752	31.1
Percent change 2006-2030	0.0%	-5.5%	Percent change 2006-2030	9.1%	3.1%
Annualized change 2006-2030	0.00%	-0.24%	Annualized change 2006-2030	0.36%	0.13%

Non-Primary Care Specialties

Figure 272 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	236	10.2
2015	252	10.8
2020	264	11.1
2025	273	11.4
2030	282	11.7
Percent change 2006-2030	25.7%	18.8%
Annualized change 2006-2030	0.96%	0.72%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	953	41.3
2015	1,042	44.4
2020	1,113	46.8
2025	1,170	48.7
2030	1,219	50.5
Percent change 2006-2030	37.6%	30.0%
Annualized change 2006-2030	1.34%	1.10%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	418	18.1
2015	427	18.2
2020	430	18.1
2025	425	17.7
2030	420	17.4
Percent change 2006-2030	4.0%	-1.8%
Annualized change 2006-2030	0.16%	-0.08%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	163	7.0
2015	154	6.6
2020	144	6.1
2025	134	5.6
2030	124	5.1
Percent change 2006-2030	-27.0%	-31.1%
Annualized change 2006-2030	-1.30%	-1.54%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	825	35.7
2015	803	34.2
2020	762	32.0
2025	717	29.9
2030	679	28.1
Percent change 2006-2030	-18.8%	-23.3%
Annualized change 2006-2030	-0.87%	-1.10%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	438	19.0
2015	438	18.7
2020	450	18.9
2025	455	18.9
2030	453	18.8
Percent change 2006-2030	7.6%	1.6%
Annualized change 2006-2030	0.31%	0.07%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	390	16.9
2015	407	17.3
2020	414	17.4
2025	418	17.4
2030	421	17.4
Percent change 2006-2030	15.8%	9.4%
Annualized change 2006-2030	0.61%	0.38%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	266	11.5
2015	299	12.7
2020	328	13.8
2025	351	14.6
2030	370	15.3
Percent change 2006-2030	53.5%	45.0%
Annualized change 2006-2030	1.80%	1.56%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	282	12.2
2015	294	12.5
2020	297	12.5
2025	302	12.6
2030	304	12.6
Percent change 2006-2030	13.6%	7.3%
Annualized change 2006-2030	0.53%	0.29%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	242	10.5
2015	231	9.8
2020	218	9.2
2025	205	8.5
2030	194	8.0
Percent change 2006-2030	-21.6%	-25.9%
Annualized change 2006-2030	-1.01%	-1.24%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	104	4.5
2015	103	4.4
2020	101	4.2
2025	98	4.1
2030	93	3.9
Percent change 2006-2030	-9.4%	-14.4%
Annualized change 2006-2030	-0.41%	-0.65%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	206	8.9
2015	210	9.0
2020	213	8.9
2025	214	8.9
2030	215	8.9
Percent change 2006-2030	8.5%	2.5%
Annualized change 2006-2030	0.34%	0.10%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	95	4.1
2020	90	3.8
2025	85	3.5
2030	81	3.4
Percent change 2006-2030	-21.4%	-25.7%
Annualized change 2006-2030	-1.00%	-1.23%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	141	6.1
2015	137	5.8
2020	132	5.5
2025	126	5.3
2030	120	5.0
Percent change 2006-2030	-15.7%	-20.4%
Annualized change 2006-2030	-0.71%	-0.94%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	913	39.5
2015	924	39.4
2020	917	38.6
2025	900	37.5
2030	884	36.6
Percent change 2006-2030	0.4%	-5.1%
Annualized change 2006-2030	0.02%	-0.22%

Hudson Valley Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 273 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,558	370.5
2015	8,753	373.3
2020	8,830	371.5
2025	8,812	366.9
2030	8,758	362.6
Percent change 2006-2030	5.9%	0.0%
Annualized change 2006-2030	0.24%	0.00%

Figure 274 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,905	125.8	2010	5,653	244.7
2015	2,956	126.1	2015	5,796	247.2
2020	2,962	124.6	2020	5,868	246.9
2025	2,926	121.8	2025	5,886	245.0
2030	2,867	118.7	2030	5,891	243.9
Percent change 2006-2030	2.9%	-2.8%	Percent change 2006-2030	7.4%	1.4%
Annualized change 2006-2030	0.12%	-0.12%	Annualized change 2006-2030	0.30%	0.06%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 275 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,905	125.8	2010	573	24.8
2015	2,956	126.1	2015	583	24.9
2020	2,962	124.6	2020	580	24.4
2025	2,926	121.8	2025	565	23.5
2030	2,867	118.7	2030	541	22.4
Percent change 2006-2030	2.9%	-2.8%	Percent change 2006-2030	-3.0%	-8.4%
Annualized change 2006-2030	0.12%	-0.12%	Annualized change 2006-2030	-0.13%	-0.36%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,617	70.0	2010	715	31.0
2015	1,640	69.9	2015	733	31.3
2020	1,637	68.9	2020	745	31.3
2025	1,611	67.1	2025	750	31.2
2030	1,571	65.1	2030	755	31.2
Percent change 2006-2030	2.0%	-3.6%	Percent change 2006-2030	9.6%	3.5%
Annualized change 2006-2030	0.08%	-0.15%	Annualized change 2006-2030	0.38%	0.14%

Non-Primary Care Specialties

Figure 276 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	234	10.1
2015	252	10.7
2020	265	11.2
2025	275	11.5
2030	285	11.8
Percent change 2006-2030	27.4%	20.4%
Annualized change 2006-2030	1.02%	0.78%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	949	41.1
2015	1,041	44.4
2020	1,119	47.1
2025	1,181	49.2
2030	1,238	51.3
Percent change 2006-2030	39.7%	32.0%
Annualized change 2006-2030	1.40%	1.16%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	415	18.0
2015	423	18.0
2020	424	17.8
2025	419	17.5
2030	413	17.1
Percent change 2006-2030	2.2%	-3.4%
Annualized change 2006-2030	0.09%	-0.14%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	162	7.0
2015	152	6.5
2020	143	6.0
2025	134	5.6
2030	124	5.1
Percent change 2006-2030	-27.1%	-31.1%
Annualized change 2006-2030	-1.31%	-1.54%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	825	35.7
2015	805	34.4
2020	767	32.3
2025	726	30.2
2030	692	28.6
Percent change 2006-2030	-17.4%	-21.9%
Annualized change 2006-2030	-0.79%	-1.03%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	436	18.9
2015	436	18.6
2020	449	18.9
2025	454	18.9
2030	453	18.7
Percent change 2006-2030	7.6%	1.6%
Annualized change 2006-2030	0.30%	0.07%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	387	16.8
2015	404	17.2
2020	412	17.3
2025	417	17.4
2030	420	17.4
Percent change 2006-2030	15.7%	9.3%
Annualized change 2006-2030	0.61%	0.37%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	265	11.5
2015	298	12.7
2020	326	13.7
2025	350	14.6
2030	369	15.3
Percent change 2006-2030	53.0%	44.5%
Annualized change 2006-2030	1.79%	1.55%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	281	12.2
2015	293	12.5
2020	297	12.5
2025	302	12.6
2030	306	12.7
Percent change 2006-2030	14.1%	7.8%
Annualized change 2006-2030	0.55%	0.31%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	240	10.4
2015	230	9.8
2020	219	9.2
2025	205	8.6
2030	195	8.1
Percent change 2006-2030	-21.1%	-25.5%
Annualized change 2006-2030	-0.98%	-1.22%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	103	4.5
2015	103	4.4
2020	100	4.2
2025	98	4.1
2030	94	3.9
Percent change 2006-2030	-8.6%	-13.6%
Annualized change 2006-2030	-0.37%	-0.61%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	205	8.9
2015	208	8.9
2020	210	8.9
2025	211	8.8
2030	213	8.8
Percent change 2006-2030	7.4%	1.4%
Annualized change 2006-2030	0.30%	0.06%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	95	4.1
2020	90	3.8
2025	86	3.6
2030	81	3.4
Percent change 2006-2030	-21.0%	-25.3%
Annualized change 2006-2030	-0.98%	-1.21%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	140	6.1
2015	136	5.8
2020	132	5.6
2025	126	5.3
2030	120	5.0
Percent change 2006-2030	-15.5%	-20.2%
Annualized change 2006-2030	-0.70%	-0.93%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	909	39.3
2015	921	39.3
2020	915	38.5
2025	901	37.5
2030	888	36.8
Percent change 2006-2030	0.9%	-4.7%
Annualized change 2006-2030	0.04%	-0.20%

Hudson Valley Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 277 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,585	371.7
2015	8,769	374.1
2020	8,827	371.3
2025	8,789	365.9
2030	8,708	360.5
Percent change 2006-2030	5.2%	-0.6%
Annualized change 2006-2030	0.21%	-0.02%

Figure 278 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,911	126.0	2010	5,674	245.7
2015	2,959	126.2	2015	5,810	247.8
2020	2,964	124.7	2020	5,863	246.6
2025	2,930	122.0	2025	5,859	243.9
2030	2,867	118.7	2030	5,841	241.8
Percent change 2006-2030	2.9%	-2.8%	Percent change 2006-2030	6.4%	0.6%
Annualized change 2006-2030	0.12%	-0.12%	Annualized change 2006-2030	0.26%	0.02%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 279 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,911	126.0	2010	578	25.0
2015	2,959	126.2	2015	593	25.3
2020	2,964	124.7	2020	593	25.0
2025	2,930	122.0	2025	581	24.2
2030	2,867	118.7	2030	560	23.2
Percent change 2006-2030	2.9%	-2.8%	Percent change 2006-2030	0.4%	-5.2%
Annualized change 2006-2030	0.12%	-0.12%	Annualized change 2006-2030	0.02%	-0.22%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,624	70.3	2010	709	30.7
2015	1,642	70.1	2015	724	30.9
2020	1,631	68.6	2020	740	31.1
2025	1,599	66.6	2025	750	31.2
2030	1,550	64.2	2030	757	31.3
Percent change 2006-2030	0.7%	-4.9%	Percent change 2006-2030	9.8%	3.7%
Annualized change 2006-2030	0.03%	-0.21%	Annualized change 2006-2030	0.39%	0.15%

Non-Primary Care Specialties

Figure 280 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	236	10.2
2015	252	10.8
2020	263	11.1
2025	272	11.3
2030	281	11.6
Percent change 2006-2030	25.4%	18.4%
Annualized change 2006-2030	0.95%	0.71%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	953	41.3
2015	1,041	44.4
2020	1,111	46.7
2025	1,167	48.6
2030	1,216	50.3
Percent change 2006-2030	37.2%	29.6%
Annualized change 2006-2030	1.33%	1.09%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	418	18.1
2015	427	18.2
2020	430	18.1
2025	424	17.7
2030	419	17.3
Percent change 2006-2030	3.7%	-2.1%
Annualized change 2006-2030	0.15%	-0.09%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	163	7.0
2015	154	6.5
2020	144	6.1
2025	134	5.6
2030	124	5.1
Percent change 2006-2030	-27.2%	-31.3%
Annualized change 2006-2030	-1.32%	-1.55%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	825	35.7
2015	802	34.2
2020	760	32.0
2025	715	29.8
2030	677	28.0
Percent change 2006-2030	-19.1%	-23.6%
Annualized change 2006-2030	-0.88%	-1.11%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	438	19.0
2015	438	18.7
2020	450	18.9
2025	454	18.9
2030	452	18.7
Percent change 2006-2030	7.3%	1.3%
Annualized change 2006-2030	0.29%	0.05%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	390	16.9
2015	406	17.3
2020	414	17.4
2025	417	17.4
2030	419	17.4
Percent change 2006-2030	15.5%	9.1%
Annualized change 2006-2030	0.60%	0.36%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	266	11.5
2015	298	12.7
2020	327	13.8
2025	350	14.6
2030	369	15.3
Percent change 2006-2030	53.1%	44.6%
Annualized change 2006-2030	1.79%	1.55%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	282	12.2
2015	294	12.5
2020	297	12.5
2025	301	12.5
2030	303	12.6
Percent change 2006-2030	13.2%	7.0%
Annualized change 2006-2030	0.52%	0.28%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	242	10.5
2015	231	9.8
2020	218	9.2
2025	205	8.5
2030	193	8.0
Percent change 2006-2030	-21.8%	-26.1%
Annualized change 2006-2030	-1.02%	-1.25%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	104	4.5
2015	103	4.4
2020	100	4.2
2025	98	4.1
2030	93	3.9
Percent change 2006-2030	-9.7%	-14.7%
Annualized change 2006-2030	-0.42%	-0.66%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	206	8.9
2015	210	8.9
2020	212	8.9
2025	213	8.9
2030	214	8.9
Percent change 2006-2030	8.2%	2.2%
Annualized change 2006-2030	0.33%	0.09%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	95	4.1
2020	90	3.8
2025	85	3.5
2030	81	3.3
Percent change 2006-2030	-21.6%	-26.0%
Annualized change 2006-2030	-1.01%	-1.24%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	141	6.1
2015	137	5.8
2020	132	5.5
2025	126	5.2
2030	119	4.9
Percent change 2006-2030	-16.0%	-20.6%
Annualized change 2006-2030	-0.72%	-0.96%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	912	39.5
2015	923	39.4
2020	915	38.5
2025	898	37.4
2030	881	36.5
Percent change 2006-2030	0.1%	-5.4%
Annualized change 2006-2030	0.01%	-0.23%

Hudson Valley Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 281 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,558	370.5
2015	8,753	373.3
2020	8,830	371.5
2025	8,812	366.9
2030	8,758	362.6
Percent change 2006-2030	5.9%	0.0%
Annualized change 2006-2030	0.24%	0.00%

Figure 282 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,906	125.8	2010	5,652	244.7
2015	2,960	126.2	2015	5,793	247.1
2020	2,968	124.8	2020	5,862	246.6
2025	2,935	122.2	2025	5,877	244.7
2030	2,878	119.2	2030	5,880	243.4
Percent change 2006-2030	3.3%	-2.4%	Percent change 2006-2030	7.2%	1.2%
Annualized change 2006-2030	0.13%	-0.10%	Annualized change 2006-2030	0.29%	0.05%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 283 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,906	125.8	2010	573	24.8
2015	2,960	126.2	2015	584	24.9
2020	2,968	124.8	2020	581	24.4
2025	2,935	122.2	2025	566	23.6
2030	2,878	119.2	2030	543	22.5
Percent change 2006-2030	3.3%	-2.4%	Percent change 2006-2030	-2.7%	-8.0%
Annualized change 2006-2030	0.13%	-0.10%	Annualized change 2006-2030	-0.11%	-0.35%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,617	70.0	2010	715	31.0
2015	1,642	70.0	2015	734	31.3
2020	1,640	69.0	2020	746	31.4
2025	1,616	67.3	2025	753	31.3
2030	1,577	65.3	2030	758	31.4
Percent change 2006-2030	2.4%	-3.2%	Percent change 2006-2030	10.0%	3.9%
Annualized change 2006-2030	0.10%	-0.14%	Annualized change 2006-2030	0.40%	0.16%

Non-Primary Care Specialties

Figure 284 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	234	10.1
2015	251	10.7
2020	265	11.1
2025	275	11.4
2030	285	11.8
Percent change 2006-2030	27.2%	20.2%
Annualized change 2006-2030	1.01%	0.77%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	949	41.1
2015	1,040	44.4
2020	1,118	47.0
2025	1,179	49.1
2030	1,236	51.2
Percent change 2006-2030	39.5%	31.7%
Annualized change 2006-2030	1.40%	1.16%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	415	18.0
2015	423	18.0
2020	423	17.8
2025	419	17.4
2030	412	17.1
Percent change 2006-2030	2.0%	-3.6%
Annualized change 2006-2030	0.08%	-0.15%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	162	7.0
2015	152	6.5
2020	143	6.0
2025	133	5.6
2030	124	5.1
Percent change 2006-2030	-27.2%	-31.2%
Annualized change 2006-2030	-1.32%	-1.55%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	825	35.7
2015	805	34.3
2020	766	32.2
2025	725	30.2
2030	690	28.6
Percent change 2006-2030	-17.5%	-22.1%
Annualized change 2006-2030	-0.80%	-1.03%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	436	18.9
2015	435	18.6
2020	448	18.9
2025	453	18.9
2030	452	18.7
Percent change 2006-2030	7.4%	1.4%
Annualized change 2006-2030	0.30%	0.06%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	387	16.8
2015	404	17.2
2020	412	17.3
2025	416	17.3
2030	419	17.4
Percent change 2006-2030	15.5%	9.1%
Annualized change 2006-2030	0.60%	0.36%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	265	11.5
2015	297	12.7
2020	325	13.7
2025	349	14.5
2030	368	15.2
Percent change 2006-2030	52.7%	44.2%
Annualized change 2006-2030	1.78%	1.54%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	281	12.2
2015	293	12.5
2020	297	12.5
2025	302	12.6
2030	305	12.6
Percent change 2006-2030	13.9%	7.6%
Annualized change 2006-2030	0.54%	0.30%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	240	10.4
2015	230	9.8
2020	218	9.2
2025	205	8.5
2030	194	8.1
Percent change 2006-2030	-21.3%	-25.6%
Annualized change 2006-2030	-0.99%	-1.23%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	103	4.5
2015	103	4.4
2020	100	4.2
2025	98	4.1
2030	94	3.9
Percent change 2006-2030	-8.7%	-13.8%
Annualized change 2006-2030	-0.38%	-0.62%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	205	8.9
2015	208	8.9
2020	210	8.8
2025	211	8.8
2030	212	8.8
Percent change 2006-2030	7.2%	1.3%
Annualized change 2006-2030	0.29%	0.05%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	95	4.1
2020	90	3.8
2025	85	3.6
2030	81	3.4
Percent change 2006-2030	-21.1%	-25.5%
Annualized change 2006-2030	-0.98%	-1.22%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	140	6.1
2015	136	5.8
2020	132	5.5
2025	126	5.2
2030	120	5.0
Percent change 2006-2030	-15.7%	-20.3%
Annualized change 2006-2030	-0.71%	-0.94%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	909	39.3
2015	920	39.3
2020	914	38.5
2025	900	37.5
2030	887	36.7
Percent change 2006-2030	0.7%	-4.8%
Annualized change 2006-2030	0.03%	-0.21%

Hudson Valley Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 285 – Hudson Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	8,274	362.6
2010	8,585	371.7
2015	8,769	374.1
2020	8,827	371.3
2025	8,789	365.9
2030	8,708	360.5
Percent change 2006-2030	5.2%	-0.6%
Annualized change 2006-2030	0.21%	-0.02%

Figure 286 – Hudson Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,911	126.0	2010	5,673	245.6
2015	2,962	126.4	2015	5,807	247.7
2020	2,970	124.9	2020	5,857	246.4
2025	2,938	122.3	2025	5,850	243.6
2030	2,878	119.1	2030	5,830	241.4
Percent change 2006-2030	3.3%	-2.5%	Percent change 2006-2030	6.3%	0.4%
Annualized change 2006-2030	0.13%	-0.10%	Annualized change 2006-2030	0.25%	0.02%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 287 – Hudson Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,911	126.0	2010	578	25.0
2015	2,962	126.4	2015	594	25.3
2020	2,970	124.9	2020	594	25.0
2025	2,938	122.3	2025	583	24.3
2030	2,878	119.1	2030	562	23.3
Percent change 2006-2030	3.3%	-2.5%	Percent change 2006-2030	0.8%	-4.8%
Annualized change 2006-2030	0.13%	-0.10%	Annualized change 2006-2030	0.03%	-0.20%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,624	70.3	2010	709	30.7
2015	1,644	70.1	2015	724	30.9
2020	1,635	68.8	2020	741	31.2
2025	1,603	66.7	2025	752	31.3
2030	1,556	64.4	2030	759	31.4
Percent change 2006-2030	1.0%	-4.6%	Percent change 2006-2030	10.2%	4.1%
Annualized change 2006-2030	0.04%	-0.19%	Annualized change 2006-2030	0.41%	0.17%

Non-Primary Care Specialties

Figure 288 – Hudson Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	224	9.8
2010	236	10.2
2015	252	10.7
2020	263	11.1
2025	272	11.3
2030	280	11.6
Percent change 2006-2030	25.1%	18.2%
Annualized change 2006-2030	0.94%	0.70%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	886	38.8
2010	953	41.2
2015	1,040	44.4
2020	1,110	46.7
2025	1,165	48.5
2030	1,213	50.2
Percent change 2006-2030	36.9%	29.4%
Annualized change 2006-2030	1.32%	1.08%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	404	17.7
2010	418	18.1
2015	427	18.2
2020	429	18.1
2025	424	17.6
2030	418	17.3
Percent change 2006-2030	3.5%	-2.3%
Annualized change 2006-2030	0.14%	-0.10%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	170	7.5
2010	163	7.0
2015	153	6.5
2020	144	6.0
2025	133	5.6
2030	123	5.1
Percent change 2006-2030	-27.4%	-31.4%
Annualized change 2006-2030	-1.32%	-1.56%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	837	36.7
2010	824	35.7
2015	802	34.2
2020	760	32.0
2025	714	29.7
2030	676	28.0
Percent change 2006-2030	-19.2%	-23.7%
Annualized change 2006-2030	-0.89%	-1.12%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	421	18.4
2010	438	18.9
2015	437	18.7
2020	449	18.9
2025	453	18.9
2030	451	18.7
Percent change 2006-2030	7.1%	1.1%
Annualized change 2006-2030	0.28%	0.05%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	363	15.9
2010	389	16.9
2015	406	17.3
2020	413	17.4
2025	417	17.3
2030	418	17.3
Percent change 2006-2030	15.3%	8.9%
Annualized change 2006-2030	0.59%	0.36%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	241	10.6
2010	266	11.5
2015	298	12.7
2020	327	13.7
2025	350	14.6
2030	368	15.2
Percent change 2006-2030	52.8%	44.3%
Annualized change 2006-2030	1.78%	1.54%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	268	11.7
2010	282	12.2
2015	294	12.5
2020	296	12.5
2025	301	12.5
2030	303	12.5
Percent change 2006-2030	13.0%	6.8%
Annualized change 2006-2030	0.51%	0.27%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	247	10.8
2010	242	10.5
2015	231	9.8
2020	218	9.2
2025	204	8.5
2030	193	8.0
Percent change 2006-2030	-21.9%	-26.3%
Annualized change 2006-2030	-1.03%	-1.26%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	104	4.5
2015	103	4.4
2020	100	4.2
2025	97	4.1
2030	93	3.8
Percent change 2006-2030	-9.9%	-14.9%
Annualized change 2006-2030	-0.43%	-0.67%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	198	8.7
2010	206	8.9
2015	210	8.9
2020	212	8.9
2025	213	8.9
2030	214	8.9
Percent change 2006-2030	8.0%	2.0%
Annualized change 2006-2030	0.32%	0.08%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	103	4.5
2010	100	4.3
2015	95	4.1
2020	90	3.8
2025	85	3.5
2030	81	3.3
Percent change 2006-2030	-21.8%	-26.1%
Annualized change 2006-2030	-1.02%	-1.25%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	6.2
2010	141	6.1
2015	137	5.8
2020	131	5.5
2025	126	5.2
2030	119	4.9
Percent change 2006-2030	-16.1%	-20.8%
Annualized change 2006-2030	-0.73%	-0.97%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	880	38.6
2010	912	39.5
2015	923	39.4
2020	914	38.5
2025	897	37.3
2030	879	36.4
Percent change 2006-2030	-0.1%	-5.6%
Annualized change 2006-2030	0.00%	-0.24%

Long Island Physician Supply, 2006 – 2030
Long Island Supply Scenario 1: Baseline (Supply Not Responsive to Demand)

Figure 289 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,554	408.1
2015	11,953	422.2
2020	12,205	431.2
2025	12,321	437.1
2030	12,370	443.5
Percent change 2006-2030	11.2%	12.9%
Annualized change 2006-2030	0.44%	0.51%

Figure 290 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,589	126.7	2010	7,966	281.3
2015	3,670	129.6	2015	8,283	292.6
2020	3,694	130.5	2020	8,510	300.6
2025	3,668	130.1	2025	8,653	307.0
2030	3,609	129.4	2030	8,760	314.1
Percent change 2006-2030	4.8%	6.4%	Percent change 2006-2030	14.1%	15.8%
Annualized change 2006-2030	0.20%	0.26%	Annualized change 2006-2030	0.55%	0.61%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 291 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,589	126.7	2010	833	29.4
2015	3,670	129.6	2015	852	30.1
2020	3,694	130.5	2020	850	30.0
2025	3,668	130.1	2025	832	29.5
2030	3,609	129.4	2030	800	28.7
Percent change 2006-2030	4.8%	6.4%	Percent change 2006-2030	-1.2%	0.3%
Annualized change 2006-2030	0.20%	0.26%	Annualized change 2006-2030	-0.05%	0.01%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,797	63.5	2010	959	33.9
2015	1,831	64.7	2015	987	34.9
2020	1,836	64.9	2020	1,008	35.6
2025	1,816	64.4	2025	1,020	36.2
2030	1,778	63.8	2030	1,030	36.9
Percent change 2006-2030	4.0%	5.6%	Percent change 2006-2030	11.6%	13.3%
Annualized change 2006-2030	0.16%	0.23%	Annualized change 2006-2030	0.46%	0.52%

Non-Primary Care Specialties

Figure 292 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	490	17.3
2015	530	18.7
2020	562	19.9
2025	588	20.8
2030	613	22.0
Percent change 2006-2030	31.0%	33.0%
Annualized change 2006-2030	1.13%	1.19%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,584	55.9
2015	1,749	61.8
2020	1,893	66.9
2025	2,011	71.4
2030	2,120	76.0
Percent change 2006-2030	43.6%	45.8%
Annualized change 2006-2030	1.52%	1.58%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	581	20.5
2015	595	21.0
2020	600	21.2
2025	598	21.2
2030	593	21.2
Percent change 2006-2030	5.1%	6.7%
Annualized change 2006-2030	0.21%	0.27%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	246	8.7
2015	233	8.2
2020	221	7.8
2025	207	7.4
2030	193	6.9
Percent change 2006-2030	-25.0%	-23.9%
Annualized change 2006-2030	-1.19%	-1.13%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	646	22.8
2015	636	22.5
2020	609	21.5
2025	581	20.6
2030	556	19.9
Percent change 2006-2030	-15.0%	-13.8%
Annualized change 2006-2030	-0.68%	-0.62%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	707	25.0
2015	712	25.1
2020	738	26.1
2025	752	26.7
2030	754	27.0
Percent change 2006-2030	10.6%	12.2%
Annualized change 2006-2030	0.42%	0.48%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	627	22.2
2015	659	23.3
2020	677	23.9
2025	689	24.4
2030	698	25.0
Percent change 2006-2030	19.0%	20.7%
Annualized change 2006-2030	0.73%	0.79%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	436	15.4
2015	493	17.4
2020	544	19.2
2025	587	20.8
2030	623	22.3
Percent change 2006-2030	57.2%	59.6%
Annualized change 2006-2030	1.90%	1.97%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	390	13.8
2015	409	14.4
2020	418	14.8
2025	428	15.2
2030	435	15.6
Percent change 2006-2030	17.3%	19.0%
Annualized change 2006-2030	0.67%	0.73%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	287	10.2
2015	277	9.8
2020	265	9.4
2025	251	8.9
2030	239	8.6
Percent change 2006-2030	-18.9%	-17.7%
Annualized change 2006-2030	-0.87%	-0.81%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	114	4.0
2020	112	3.9
2025	110	3.9
2030	106	3.8
Percent change 2006-2030	-6.0%	-4.6%
Annualized change 2006-2030	-0.26%	-0.20%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	316	11.2
2015	323	11.4
2020	329	11.6
2025	333	11.8
2030	337	12.1
Percent change 2006-2030	10.4%	12.0%
Annualized change 2006-2030	0.41%	0.48%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	161	5.7
2015	154	5.4
2020	146	5.2
2025	140	5.0
2030	134	4.8
Percent change 2006-2030	-18.8%	-17.5%
Annualized change 2006-2030	-0.86%	-0.80%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	209	7.4
2015	204	7.2
2020	199	7.0
2025	192	6.8
2030	183	6.6
Percent change 2006-2030	-13.1%	-11.8%
Annualized change 2006-2030	-0.59%	-0.52%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,172	41.4
2015	1,196	42.2
2020	1,196	42.3
2025	1,186	42.1
2030	1,176	42.1
Percent change 2006-2030	3.8%	5.3%
Annualized change 2006-2030	0.15%	0.22%

Long Island Supply Scenario 1: Baseline (Supply Responsive to Demand)

Figure 293 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,462	404.8
2015	11,705	413.4
2020	11,795	416.7
2025	11,760	417.2
2030	11,634	417.1
Percent change 2006-2030	4.6%	6.2%
Annualized change 2006-2030	0.19%	0.25%

Figure 294 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,547	125.3	2010	7,916	279.6
2015	3,566	126.0	2015	8,138	287.4
2020	3,545	125.2	2020	8,250	291.5
2025	3,485	123.6	2025	8,275	293.6
2030	3,385	121.3	2030	8,250	295.8
Percent change 2006-2030	-1.7%	-0.2%	Percent change 2006-2030	7.4%	9.0%
Annualized change 2006-2030	-0.07%	-0.01%	Annualized change 2006-2030	0.30%	0.36%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 295 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,547	125.3	2010	830	29.3
2015	3,566	126.0	2015	843	29.8
2020	3,545	125.2	2020	836	29.5
2025	3,485	123.6	2025	811	28.8
2030	3,385	121.3	2030	774	27.7
Percent change 2006-2030	-1.7%	-0.2%	Percent change 2006-2030	-4.5%	-3.0%
Annualized change 2006-2030	-0.07%	-0.01%	Annualized change 2006-2030	-0.19%	-0.13%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,786	63.1	2010	931	32.9
2015	1,794	63.3	2015	929	32.8
2020	1,771	62.6	2020	938	33.1
2025	1,724	61.2	2025	950	33.7
2030	1,659	59.5	2030	952	34.1
Percent change 2006-2030	-3.0%	-1.5%	Percent change 2006-2030	3.1%	4.7%
Annualized change 2006-2030	-0.13%	-0.06%	Annualized change 2006-2030	0.13%	0.19%

Non-Primary Care Specialties

Figure 296 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	487	17.2
2015	520	18.4
2020	543	19.2
2025	559	19.8
2030	575	20.6
Percent change 2006-2030	22.9%	24.7%
Annualized change 2006-2030	0.86%	0.92%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,574	55.6
2015	1,715	60.6
2020	1,828	64.6
2025	1,914	67.9
2030	1,984	71.1
Percent change 2006-2030	34.4%	36.4%
Annualized change 2006-2030	1.24%	1.30%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	579	20.4
2015	593	20.9
2020	592	20.9
2025	581	20.6
2030	566	20.3
Percent change 2006-2030	0.3%	1.8%
Annualized change 2006-2030	0.01%	0.08%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	245	8.7
2015	230	8.1
2020	215	7.6
2025	200	7.1
2030	184	6.6
Percent change 2006-2030	-28.8%	-27.7%
Annualized change 2006-2030	-1.40%	-1.34%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	640	22.6
2015	621	21.9
2020	585	20.7
2025	548	19.4
2030	514	18.4
Percent change 2006-2030	-21.5%	-20.4%
Annualized change 2006-2030	-1.01%	-0.94%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	703	24.8
2015	700	24.7
2020	717	25.3
2025	723	25.6
2030	716	25.7
Percent change 2006-2030	4.9%	6.5%
Annualized change 2006-2030	0.20%	0.26%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	624	22.0
2015	648	22.9
2020	658	23.3
2025	663	23.5
2030	663	23.8
Percent change 2006-2030	12.9%	14.6%
Annualized change 2006-2030	0.51%	0.57%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	432	15.3
2015	482	17.0
2020	526	18.6
2025	561	19.9
2030	586	21.0
Percent change 2006-2030	48.1%	50.3%
Annualized change 2006-2030	1.65%	1.71%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	387	13.7
2015	402	14.2
2020	405	14.3
2025	408	14.5
2030	410	14.7
Percent change 2006-2030	10.4%	12.1%
Annualized change 2006-2030	0.41%	0.48%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	286	10.1
2015	272	9.6
2020	256	9.1
2025	240	8.5
2030	226	8.1
Percent change 2006-2030	-23.5%	-22.4%
Annualized change 2006-2030	-1.11%	-1.05%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	112	3.9
2020	107	3.8
2025	105	3.7
2030	100	3.6
Percent change 2006-2030	-11.7%	-10.4%
Annualized change 2006-2030	-0.52%	-0.45%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	315	11.1
2015	319	11.3
2020	321	11.4
2025	322	11.4
2030	322	11.5
Percent change 2006-2030	5.4%	7.0%
Annualized change 2006-2030	0.22%	0.28%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	159	5.6
2015	151	5.3
2020	141	5.0
2025	133	4.7
2030	126	4.5
Percent change 2006-2030	-23.6%	-22.4%
Annualized change 2006-2030	-1.11%	-1.05%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	208	7.3
2015	200	7.1
2020	193	6.8
2025	183	6.5
2030	173	6.2
Percent change 2006-2030	-18.2%	-17.0%
Annualized change 2006-2030	-0.83%	-0.77%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,164	41.1
2015	1,175	41.5
2020	1,161	41.0
2025	1,135	40.3
2030	1,107	39.7
Percent change 2006-2030	-2.3%	-0.8%
Annualized change 2006-2030	-0.10%	-0.03%

Long Island Supply Scenario 2a: NP/PA High Growth (Supply Not Responsive to Demand)

Figure 297 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,767	415.6
2015	12,422	438.7
2020	12,916	456.3
2025	13,277	471.0
2030	13,586	487.1
Percent change 2006-2030	22.2%	24.0%
Annualized change 2006-2030	0.84%	0.90%

Figure 298 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,697	130.6	2010	8,071	285.1
2015	3,903	137.8	2015	8,519	300.9
2020	4,049	143.0	2020	8,867	313.2
2025	4,143	147.0	2025	9,134	324.0
2030	4,210	150.9	2030	9,377	336.1
Percent change 2006-2030	22.3%	24.1%	Percent change 2006-2030	22.1%	23.9%
Annualized change 2006-2030	0.84%	0.90%	Annualized change 2006-2030	0.84%	0.90%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 299 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,697	130.6	2010	858	30.3
2015	3,903	137.8	2015	906	32.0
2020	4,049	143.0	2020	932	32.9
2025	4,143	147.0	2025	940	33.3
2030	4,210	150.9	2030	934	33.5
Percent change 2006-2030	22.3%	24.1%	Percent change 2006-2030	15.3%	17.0%
Annualized change 2006-2030	0.84%	0.90%	Annualized change 2006-2030	0.59%	0.66%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,851	65.4	2010	988	34.9
2015	1,947	68.8	2015	1,050	37.1
2020	2,013	71.1	2020	1,104	39.0
2025	2,051	72.8	2025	1,152	40.9
2030	2,074	74.4	2030	1,202	43.1
Percent change 2006-2030	21.3%	23.1%	Percent change 2006-2030	30.2%	32.2%
Annualized change 2006-2030	0.81%	0.87%	Annualized change 2006-2030	1.11%	1.17%

Non-Primary Care Specialties

Figure 300 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	497	17.5
2015	545	19.3
2020	586	20.7
2025	620	22.0
2030	656	23.5
Percent change 2006-2030	40.2%	42.3%
Annualized change 2006-2030	1.42%	1.48%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,605	56.7
2015	1,799	63.5
2020	1,973	69.7
2025	2,123	75.3
2030	2,269	81.3
Percent change 2006-2030	53.7%	56.0%
Annualized change 2006-2030	1.81%	1.87%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	588	20.8
2015	612	21.6
2020	626	22.1
2025	631	22.4
2030	634	22.7
Percent change 2006-2030	12.5%	14.2%
Annualized change 2006-2030	0.49%	0.55%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	249	8.8
2015	240	8.5
2020	230	8.1
2025	219	7.8
2030	207	7.4
Percent change 2006-2030	-19.8%	-18.6%
Annualized change 2006-2030	-0.91%	-0.85%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	655	23.1
2015	654	23.1
2020	635	22.4
2025	613	21.8
2030	596	21.4
Percent change 2006-2030	-9.1%	-7.7%
Annualized change 2006-2030	-0.40%	-0.33%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	716	25.3
2015	732	25.9
2020	769	27.2
2025	794	28.2
2030	807	28.9
Percent change 2006-2030	18.3%	20.1%
Annualized change 2006-2030	0.70%	0.77%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	636	22.5
2015	677	23.9
2020	705	24.9
2025	727	25.8
2030	747	26.8
Percent change 2006-2030	27.3%	29.2%
Annualized change 2006-2030	1.01%	1.07%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	442	15.6
2015	507	17.9
2020	566	20.0
2025	620	22.0
2030	666	23.9
Percent change 2006-2030	68.3%	70.8%
Annualized change 2006-2030	2.19%	2.26%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	395	14.0
2015	420	14.8
2020	436	15.4
2025	451	16.0
2030	466	16.7
Percent change 2006-2030	25.5%	27.4%
Annualized change 2006-2030	0.95%	1.01%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	291	10.3
2015	285	10.1
2020	276	9.8
2025	265	9.4
2030	256	9.2
Percent change 2006-2030	-13.2%	-11.9%
Annualized change 2006-2030	-0.59%	-0.53%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	115	4.1
2015	117	4.1
2020	116	4.1
2025	116	4.1
2030	114	4.1
Percent change 2006-2030	0.6%	2.1%
Annualized change 2006-2030	0.02%	0.09%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	320	11.3
2015	332	11.7
2020	343	12.1
2025	351	12.5
2030	360	12.9
Percent change 2006-2030	18.2%	19.9%
Annualized change 2006-2030	0.70%	0.76%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	163	5.7
2015	158	5.6
2020	152	5.4
2025	148	5.3
2030	143	5.1
Percent change 2006-2030	-13.0%	-11.7%
Annualized change 2006-2030	-0.58%	-0.52%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	212	7.5
2015	210	7.4
2020	208	7.3
2025	202	7.2
2030	196	7.0
Percent change 2006-2030	-7.0%	-5.6%
Annualized change 2006-2030	-0.30%	-0.24%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,187	41.9
2015	1,230	43.4
2020	1,246	44.0
2025	1,252	44.4
2030	1,258	45.1
Percent change 2006-2030	11.0%	12.7%
Annualized change 2006-2030	0.44%	0.50%

Long Island Supply Scenario 2a: NP/PA High Growth (Supply Responsive to Demand)

Figure 301 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,689	412.8
2015	12,203	431.0
2020	12,556	443.6
2025	12,776	453.2
2030	12,909	462.8
Percent change 2006-2030	16.1%	17.8%
Annualized change 2006-2030	0.62%	0.69%

Figure 302 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,649	128.9	2010	8,039	284.0
2015	3,790	133.9	2015	8,413	297.1
2020	3,884	137.2	2020	8,671	306.3
2025	3,938	139.7	2025	8,838	313.6
2030	3,951	141.6	2030	8,958	321.1
Percent change 2006-2030	14.7%	16.5%	Percent change 2006-2030	16.7%	18.4%
Annualized change 2006-2030	0.57%	0.64%	Annualized change 2006-2030	0.64%	0.71%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 303 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,649	128.9	2010	854	30.2
2015	3,790	133.9	2015	896	31.7
2020	3,884	137.2	2020	916	32.4
2025	3,938	139.7	2025	917	32.5
2030	3,951	141.6	2030	903	32.4
Percent change 2006-2030	14.7%	16.5%	Percent change 2006-2030	11.5%	13.2%
Annualized change 2006-2030	0.57%	0.64%	Annualized change 2006-2030	0.46%	0.52%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,838	64.9	2010	958	33.8
2015	1,906	67.3	2015	988	34.9
2020	1,941	68.6	2020	1,028	36.3
2025	1,948	69.1	2025	1,073	38.1
2030	1,937	69.4	2030	1,111	39.8
Percent change 2006-2030	13.2%	14.9%	Percent change 2006-2030	20.4%	22.2%
Annualized change 2006-2030	0.52%	0.58%	Annualized change 2006-2030	0.78%	0.84%

Non-Primary Care Specialties

Figure 304 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	495	17.5
2015	537	19.0
2020	571	20.2
2025	598	21.2
2030	624	22.4
Percent change 2006-2030	33.4%	35.4%
Annualized change 2006-2030	1.21%	1.27%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,599	56.5
2015	1,773	62.6
2020	1,922	67.9
2025	2,044	72.5
2030	2,154	77.2
Percent change 2006-2030	46.0%	48.2%
Annualized change 2006-2030	1.59%	1.65%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	588	20.8
2015	613	21.6
2020	622	22.0
2025	620	22.0
2030	614	22.0
Percent change 2006-2030	8.9%	10.6%
Annualized change 2006-2030	0.36%	0.42%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	249	8.8
2015	238	8.4
2020	226	8.0
2025	213	7.6
2030	200	7.2
Percent change 2006-2030	-22.7%	-21.5%
Annualized change 2006-2030	-1.07%	-1.00%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	650	23.0
2015	641	22.7
2020	615	21.7
2025	586	20.8
2030	558	20.0
Percent change 2006-2030	-14.8%	-13.5%
Annualized change 2006-2030	-0.67%	-0.60%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	714	25.2
2015	724	25.6
2020	753	26.6
2025	772	27.4
2030	777	27.9
Percent change 2006-2030	13.9%	15.6%
Annualized change 2006-2030	0.55%	0.61%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	634	22.4
2015	670	23.7
2020	692	24.4
2025	708	25.1
2030	720	25.8
Percent change 2006-2030	22.6%	24.4%
Annualized change 2006-2030	0.85%	0.92%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	439	15.5
2015	498	17.6
2020	553	19.5
2025	599	21.2
2030	637	22.8
Percent change 2006-2030	60.8%	63.2%
Annualized change 2006-2030	2.00%	2.06%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	393	13.9
2015	415	14.7
2020	426	15.0
2025	436	15.5
2030	445	16.0
Percent change 2006-2030	19.9%	21.7%
Annualized change 2006-2030	0.76%	0.82%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	290	10.3
2015	281	9.9
2020	269	9.5
2025	256	9.1
2030	245	8.8
Percent change 2006-2030	-17.0%	-15.7%
Annualized change 2006-2030	-0.77%	-0.71%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	114	4.0
2015	115	4.1
2020	113	4.0
2025	112	4.0
2030	108	3.9
Percent change 2006-2030	-4.1%	-2.7%
Annualized change 2006-2030	-0.17%	-0.11%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	320	11.3
2015	330	11.7
2020	338	11.9
2025	344	12.2
2030	349	12.5
Percent change 2006-2030	14.5%	16.2%
Annualized change 2006-2030	0.57%	0.63%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	162	5.7
2015	156	5.5
2020	148	5.2
2025	142	5.1
2030	137	4.9
Percent change 2006-2030	-17.0%	-15.8%
Annualized change 2006-2030	-0.77%	-0.71%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	211	7.5
2015	207	7.3
2020	203	7.2
2025	196	6.9
2030	187	6.7
Percent change 2006-2030	-11.2%	-9.9%
Annualized change 2006-2030	-0.49%	-0.43%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,183	41.8
2015	1,215	42.9
2020	1,220	43.1
2025	1,212	43.0
2030	1,202	43.1
Percent change 2006-2030	6.1%	7.7%
Annualized change 2006-2030	0.25%	0.31%

Long Island Supply Scenario 2b: NP/PA Lower Growth (Supply Not Responsive to Demand)

Figure 305 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,704	413.4
2015	12,199	430.9
2020	12,533	442.8
2025	12,735	451.8
2030	12,886	461.9
Percent change 2006-2030	15.9%	17.6%
Annualized change 2006-2030	0.62%	0.68%

Figure 306 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,668	129.6	2010	8,035	283.8
2015	3,804	134.3	2015	8,395	296.5
2020	3,879	137.0	2020	8,655	305.7
2025	3,902	138.4	2025	8,834	313.4
2030	3,898	139.7	2030	8,987	322.2
Percent change 2006-2030	13.2%	14.9%	Percent change 2006-2030	17.0%	18.8%
Annualized change 2006-2030	0.52%	0.58%	Annualized change 2006-2030	0.66%	0.72%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 307 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,668	129.6	2010	851	30.1
2015	3,804	134.3	2015	883	31.2
2020	3,879	137.0	2020	893	31.5
2025	3,902	138.4	2025	885	31.4
2030	3,898	139.7	2030	865	31.0
Percent change 2006-2030	13.2%	14.9%	Percent change 2006-2030	6.7%	8.3%
Annualized change 2006-2030	0.52%	0.58%	Annualized change 2006-2030	0.27%	0.33%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,837	64.9	2010	980	34.6
2015	1,898	67.0	2015	1,023	36.1
2020	1,928	68.1	2020	1,058	37.4
2025	1,932	68.5	2025	1,085	38.5
2030	1,921	68.9	2030	1,113	39.9
Percent change 2006-2030	12.3%	14.0%	Percent change 2006-2030	20.6%	22.4%
Annualized change 2006-2030	0.49%	0.55%	Annualized change 2006-2030	0.78%	0.85%

Non-Primary Care Specialties

Figure 308 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	495	17.5
2015	537	19.0
2020	572	20.2
2025	600	21.3
2030	629	22.5
Percent change 2006-2030	34.4%	36.4%
Annualized change 2006-2030	1.24%	1.30%

Obstetrics and Gynecology

Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	586	20.7
2015	603	21.3
2020	611	21.6
2025	611	21.7
2030	608	21.8
Percent change 2006-2030	7.8%	9.4%
Annualized change 2006-2030	0.31%	0.38%

Psychiatry

Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	652	23.0
2015	644	22.8
2020	620	21.9
2025	593	21.0
2030	571	20.5
Percent change 2006-2030	-12.8%	-11.5%
Annualized change 2006-2030	-0.57%	-0.51%

Radiology

Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	633	22.4
2015	668	23.6
2020	688	24.3
2025	704	25.0
2030	716	25.7
Percent change 2006-2030	22.0%	23.9%
Annualized change 2006-2030	0.83%	0.90%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	393	13.9
2015	414	14.6
2020	425	15.0
2025	437	15.5
2030	446	16.0
Percent change 2006-2030	20.3%	22.1%
Annualized change 2006-2030	0.77%	0.84%

Other Internal Medicine Subspecialties

Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,598	56.4
2015	1,773	62.6
2020	1,925	68.0
2025	2,053	72.8
2030	2,175	78.0
Percent change 2006-2030	47.3%	49.6%
Annualized change 2006-2030	1.63%	1.69%

Pathology

Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	248	8.8
2015	237	8.4
2020	224	7.9
2025	212	7.5
2030	198	7.1
Percent change 2006-2030	-23.1%	-22.0%
Annualized change 2006-2030	-1.09%	-1.03%

Anesthesiology

Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	713	25.2
2015	721	25.5
2020	750	26.5
2025	767	27.2
2030	774	27.7
Percent change 2006-2030	13.4%	15.1%
Annualized change 2006-2030	0.53%	0.59%

Emergency Medicine

Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	440	15.5
2015	500	17.6
2020	553	19.5
2025	599	21.3
2030	639	22.9
Percent change 2006-2030	61.3%	63.7%
Annualized change 2006-2030	2.01%	2.08%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	290	10.2
2015	280	9.9
2020	270	9.5
2025	256	9.1
2030	245	8.8
Percent change 2006-2030	-16.8%	-15.6%
Annualized change 2006-2030	-0.76%	-0.70%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	114	4.0
2015	116	4.1
2020	114	4.0
2025	112	4.0
2030	109	3.9
Percent change 2006-2030	-3.6%	-2.1%
Annualized change 2006-2030	-0.15%	-0.09%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	318	11.2
2015	328	11.6
2020	335	11.8
2025	340	12.1
2030	345	12.4
Percent change 2006-2030	13.3%	15.0%
Annualized change 2006-2030	0.52%	0.58%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	162	5.7
2015	156	5.5
2020	149	5.3
2025	143	5.1
2030	138	4.9
Percent change 2006-2030	-16.7%	-15.4%
Annualized change 2006-2030	-0.76%	-0.69%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	211	7.4
2015	207	7.3
2020	203	7.2
2025	196	6.9
2030	188	6.7
Percent change 2006-2030	-10.9%	-9.5%
Annualized change 2006-2030	-0.48%	-0.42%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,182	41.7
2015	1,212	42.8
2020	1,217	43.0
2025	1,211	43.0
2030	1,206	43.2
Percent change 2006-2030	6.4%	8.0%
Annualized change 2006-2030	0.26%	0.32%

Long Island Supply Scenario 2b: NP/PA Lower Growth (Supply Responsive to Demand)

Figure 309 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,625	410.6
2015	11,985	423.3
2020	12,185	430.5
2025	12,256	434.8
2030	12,244	439.0
Percent change 2006-2030	10.1%	11.7%
Annualized change 2006-2030	0.40%	0.46%

Figure 310 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,621	127.9	2010	8,004	282.7
2015	3,694	130.5	2015	8,291	292.8
2020	3,721	131.5	2020	8,464	299.0
2025	3,709	131.6	2025	8,548	303.2
2030	3,658	131.2	2030	8,586	307.8
Percent change 2006-2030	6.3%	7.8%	Percent change 2006-2030	11.8%	13.5%
Annualized change 2006-2030	0.25%	0.32%	Annualized change 2006-2030	0.47%	0.53%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 311 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,621	127.9	2010	847	29.9
2015	3,694	130.5	2015	874	30.9
2020	3,721	131.5	2020	878	31.0
2025	3,709	131.6	2025	863	30.6
2030	3,658	131.2	2030	836	30.0
Percent change 2006-2030	6.3%	7.8%	Percent change 2006-2030	3.3%	4.8%
Annualized change 2006-2030	0.25%	0.32%	Annualized change 2006-2030	0.13%	0.20%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,824	64.4	2010	950	33.6
2015	1,858	65.6	2015	963	34.0
2020	1,859	65.7	2020	984	34.8
2025	1,835	65.1	2025	1,011	35.8
2030	1,793	64.3	2030	1,029	36.9
Percent change 2006-2030	4.9%	6.4%	Percent change 2006-2030	11.5%	13.1%
Annualized change 2006-2030	0.20%	0.26%	Annualized change 2006-2030	0.45%	0.52%

Non-Primary Care Specialties

Figure 312 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	493	17.4
2015	529	18.7
2020	557	19.7
2025	578	20.5
2030	598	21.5
Percent change 2006-2030	27.9%	29.8%
Annualized change 2006-2030	1.03%	1.09%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,592	56.2
2015	1,747	61.7
2020	1,876	66.3
2025	1,977	70.1
2030	2,065	74.0
Percent change 2006-2030	39.9%	42.0%
Annualized change 2006-2030	1.41%	1.47%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	585	20.7
2015	604	21.3
2020	607	21.5
2025	600	21.3
2030	589	21.1
Percent change 2006-2030	4.4%	6.0%
Annualized change 2006-2030	0.18%	0.24%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	248	8.8
2015	234	8.3
2020	221	7.8
2025	206	7.3
2030	191	6.9
Percent change 2006-2030	-25.9%	-24.8%
Annualized change 2006-2030	-1.24%	-1.18%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	647	22.9
2015	632	22.3
2020	600	21.2
2025	566	20.1
2030	535	19.2
Percent change 2006-2030	-18.3%	-17.1%
Annualized change 2006-2030	-0.84%	-0.78%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	711	25.1
2015	714	25.2
2020	735	26.0
2025	747	26.5
2030	745	26.7
Percent change 2006-2030	9.2%	10.9%
Annualized change 2006-2030	0.37%	0.43%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	631	22.3
2015	660	23.3
2020	675	23.9
2025	684	24.3
2030	690	24.7
Percent change 2006-2030	17.5%	19.3%
Annualized change 2006-2030	0.67%	0.74%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	437	15.4
2015	491	17.3
2020	540	19.1
2025	579	20.6
2030	610	21.9
Percent change 2006-2030	54.1%	56.4%
Annualized change 2006-2030	1.82%	1.88%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	391	13.8
2015	409	14.4
2020	416	14.7
2025	422	15.0
2030	426	15.3
Percent change 2006-2030	14.9%	16.7%
Annualized change 2006-2030	0.58%	0.64%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	289	10.2
2015	277	9.8
2020	263	9.3
2025	248	8.8
2030	235	8.4
Percent change 2006-2030	-20.4%	-19.2%
Annualized change 2006-2030	-0.95%	-0.89%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	114	4.0
2015	114	4.0
2020	110	3.9
2025	108	3.8
2030	104	3.7
Percent change 2006-2030	-8.1%	-6.7%
Annualized change 2006-2030	-0.35%	-0.29%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	318	11.2
2015	325	11.5
2020	330	11.6
2025	332	11.8
2030	335	12.0
Percent change 2006-2030	9.7%	11.4%
Annualized change 2006-2030	0.39%	0.45%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	161	5.7
2015	153	5.4
2020	145	5.1
2025	138	4.9
2030	131	4.7
Percent change 2006-2030	-20.5%	-19.3%
Annualized change 2006-2030	-0.95%	-0.89%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	210	7.4
2015	204	7.2
2020	198	7.0
2025	189	6.7
2030	180	6.4
Percent change 2006-2030	-14.9%	-13.6%
Annualized change 2006-2030	-0.67%	-0.61%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,177	41.6
2015	1,197	42.3
2020	1,191	42.1
2025	1,173	41.6
2030	1,152	41.3
Percent change 2006-2030	1.7%	3.2%
Annualized change 2006-2030	0.07%	0.13%

Long Island Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 313 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,569	408.6
2015	12,042	425.3
2020	12,367	436.9
2025	12,557	445.5
2030	12,664	454.0
Percent change 2006-2030	13.9%	15.6%
Annualized change 2006-2030	0.54%	0.61%

Figure 314 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,594	126.9	2010	7,975	281.7
2015	3,699	130.7	2015	8,342	294.6
2020	3,748	132.4	2020	8,618	304.5
2025	3,746	132.9	2025	8,811	312.6
2030	3,707	132.9	2030	8,957	321.1
Percent change 2006-2030	7.7%	9.3%	Percent change 2006-2030	16.6%	18.4%
Annualized change 2006-2030	0.31%	0.37%	Annualized change 2006-2030	0.64%	0.71%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 315– Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,594	126.9	2010	834	29.4
2015	3,699	130.7	2015	858	30.3
2020	3,748	132.4	2020	863	30.5
2025	3,746	132.9	2025	850	30.1
2030	3,707	132.9	2030	822	29.5
Percent change 2006-2030	7.7%	9.3%	Percent change 2006-2030	1.5%	3.0%
Annualized change 2006-2030	0.31%	0.37%	Annualized change 2006-2030	0.06%	0.12%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,799	63.6	2010	960	33.9
2015	1,846	65.2	2015	995	35.2
2020	1,863	65.8	2020	1,022	36.1
2025	1,855	65.8	2025	1,042	37.0
2030	1,827	65.5	2030	1,059	37.9
Percent change 2006-2030	6.8%	8.4%	Percent change 2006-2030	14.7%	16.4%
Annualized change 2006-2030	0.28%	0.34%	Annualized change 2006-2030	0.57%	0.63%

Non-Primary Care Specialties

Figure 316 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	491	17.3
2015	534	18.9
2020	570	20.1
2025	598	21.2
2030	627	22.5
Percent change 2006-2030	33.9%	35.9%
Annualized change 2006-2030	1.22%	1.29%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,586	56.0
2015	1,761	62.2
2020	1,917	67.7
2025	2,048	72.7
2030	2,167	77.7
Percent change 2006-2030	46.8%	49.1%
Annualized change 2006-2030	1.61%	1.68%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	581	20.5
2015	600	21.2
2020	608	21.5
2025	609	21.6
2030	606	21.7
Percent change 2006-2030	7.4%	9.1%
Annualized change 2006-2030	0.30%	0.36%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	246	8.7
2015	235	8.3
2020	223	7.9
2025	211	7.5
2030	198	7.1
Percent change 2006-2030	-23.4%	-22.2%
Annualized change 2006-2030	-1.10%	-1.04%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	647	22.9
2015	640	22.6
2020	617	21.8
2025	592	21.0
2030	569	20.4
Percent change 2006-2030	-13.1%	-11.8%
Annualized change 2006-2030	-0.59%	-0.52%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	708	25.0
2015	717	25.3
2020	747	26.4
2025	765	27.2
2030	771	27.6
Percent change 2006-2030	13.0%	14.7%
Annualized change 2006-2030	0.51%	0.57%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	628	22.2
2015	663	23.4
2020	686	24.2
2025	702	24.9
2030	714	25.6
Percent change 2006-2030	21.6%	23.5%
Annualized change 2006-2030	0.82%	0.88%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	437	15.4
2015	497	17.5
2020	550	19.4
2025	598	21.2
2030	637	22.8
Percent change 2006-2030	60.8%	63.2%
Annualized change 2006-2030	2.00%	2.06%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	390	13.8
2015	412	14.5
2020	423	15.0
2025	435	15.4
2030	445	15.9
Percent change 2006-2030	19.9%	21.7%
Annualized change 2006-2030	0.76%	0.82%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	288	10.2
2015	279	9.8
2020	268	9.5
2025	255	9.1
2030	245	8.8
Percent change 2006-2030	-17.1%	-15.9%
Annualized change 2006-2030	-0.78%	-0.72%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	115	4.1
2020	113	4.0
2025	112	4.0
2030	109	3.9
Percent change 2006-2030	-3.9%	-2.5%
Annualized change 2006-2030	-0.17%	-0.10%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	316	11.2
2015	325	11.5
2020	333	11.8
2025	339	12.0
2030	344	12.3
Percent change 2006-2030	12.9%	14.6%
Annualized change 2006-2030	0.51%	0.57%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	161	5.7
2015	155	5.5
2020	148	5.2
2025	143	5.1
2030	137	4.9
Percent change 2006-2030	-16.9%	-15.7%
Annualized change 2006-2030	-0.77%	-0.71%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	209	7.4
2015	206	7.3
2020	202	7.1
2025	195	6.9
2030	187	6.7
Percent change 2006-2030	-11.2%	-9.9%
Annualized change 2006-2030	-0.49%	-0.43%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,173	41.4
2015	1,204	42.5
2020	1,211	42.8
2025	1,208	42.8
2030	1,202	43.1
Percent change 2006-2030	6.1%	7.7%
Annualized change 2006-2030	0.25%	0.31%

Long Island Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 317 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,476	405.3
2015	11,789	416.4
2020	11,950	422.2
2025	11,985	425.2
2030	11,915	427.2
Percent change 2006-2030	7.1%	8.7%
Annualized change 2006-2030	0.29%	0.35%

Figure 318 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,551	125.4	2010	7,925	279.9
2015	3,594	127.0	2015	8,194	289.4
2020	3,596	127.1	2020	8,353	295.1
2025	3,560	126.3	2025	8,425	298.9
2030	3,478	124.7	2030	8,437	302.5
Percent change 2006-2030	1.0%	2.5%	Percent change 2006-2030	9.9%	11.5%
Annualized change 2006-2030	0.04%	0.10%	Annualized change 2006-2030	0.39%	0.46%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 319– Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,551	125.4	2010	831	29.3
2015	3,594	127.0	2015	850	30.0
2020	3,596	127.1	2020	848	30.0
2025	3,560	126.3	2025	829	29.4
2030	3,478	124.7	2030	795	28.5
Percent change 2006-2030	1.0%	2.5%	Percent change 2006-2030	-1.8%	-0.4%
Annualized change 2006-2030	0.04%	0.10%	Annualized change 2006-2030	-0.08%	-0.02%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,788	63.2	2010	932	32.9
2015	1,808	63.8	2015	937	33.1
2020	1,797	63.5	2020	951	33.6
2025	1,761	62.5	2025	970	34.4
2030	1,705	61.1	2030	978	35.1
Percent change 2006-2030	-0.3%	1.2%	Percent change 2006-2030	6.0%	7.5%
Annualized change 2006-2030	-0.01%	0.05%	Annualized change 2006-2030	0.24%	0.30%

Non-Primary Care Specialties

Figure 320 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	488	17.2
2015	523	18.5
2020	550	19.4
2025	570	20.2
2030	588	21.1
Percent change 2006-2030	25.7%	27.5%
Annualized change 2006-2030	0.96%	1.02%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,576	55.7
2015	1,727	61.0
2020	1,851	65.4
2025	1,949	69.1
2030	2,029	72.7
Percent change 2006-2030	37.5%	39.5%
Annualized change 2006-2030	1.34%	1.40%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	579	20.5
2015	597	21.1
2020	599	21.2
2025	591	21.0
2030	579	20.7
Percent change 2006-2030	2.6%	4.1%
Annualized change 2006-2030	0.11%	0.17%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	245	8.7
2015	232	8.2
2020	218	7.7
2025	203	7.2
2030	188	6.7
Percent change 2006-2030	-27.2%	-26.1%
Annualized change 2006-2030	-1.31%	-1.25%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	641	22.6
2015	625	22.1
2020	593	20.9
2025	558	19.8
2030	526	18.8
Percent change 2006-2030	-19.8%	-18.6%
Annualized change 2006-2030	-0.91%	-0.85%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	704	24.9
2015	705	24.9
2020	726	25.6
2025	736	26.1
2030	732	26.2
Percent change 2006-2030	7.3%	8.9%
Annualized change 2006-2030	0.29%	0.36%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	625	22.1
2015	652	23.0
2020	666	23.5
2025	675	23.9
2030	678	24.3
Percent change 2006-2030	15.5%	17.2%
Annualized change 2006-2030	0.60%	0.66%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	433	15.3
2015	486	17.1
2020	533	18.8
2025	571	20.3
2030	600	21.5
Percent change 2006-2030	51.4%	53.7%
Annualized change 2006-2030	1.74%	1.81%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	387	13.7
2015	404	14.3
2020	410	14.5
2025	416	14.7
2030	419	15.0
Percent change 2006-2030	13.0%	14.6%
Annualized change 2006-2030	0.51%	0.57%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	286	10.1
2015	274	9.7
2020	260	9.2
2025	244	8.7
2030	231	8.3
Percent change 2006-2030	-21.8%	-20.6%
Annualized change 2006-2030	-1.02%	-0.96%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	112	4.0
2020	109	3.8
2025	107	3.8
2030	102	3.7
Percent change 2006-2030	-9.7%	-8.3%
Annualized change 2006-2030	-0.42%	-0.36%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	315	11.1
2015	321	11.4
2020	325	11.5
2025	328	11.6
2030	329	11.8
Percent change 2006-2030	7.8%	9.5%
Annualized change 2006-2030	0.31%	0.38%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	159	5.6
2015	152	5.4
2020	143	5.0
2025	136	4.8
2030	129	4.6
Percent change 2006-2030	-21.8%	-20.7%
Annualized change 2006-2030	-1.02%	-0.96%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	208	7.3
2015	202	7.1
2020	195	6.9
2025	186	6.6
2030	176	6.3
Percent change 2006-2030	-16.4%	-15.1%
Annualized change 2006-2030	-0.74%	-0.68%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,166	41.2
2015	1,183	41.8
2020	1,175	41.5
2025	1,156	41.0
2030	1,132	40.6
Percent change 2006-2030	-0.1%	1.4%
Annualized change 2006-2030	0.00%	0.06%

Long Island Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 321 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,569	408.6
2015	12,042	425.3
2020	12,367	436.9
2025	12,557	445.5
2030	12,664	454.0
Percent change 2006-2030	13.9%	15.6%
Annualized change 2006-2030	0.54%	0.61%

Figure 322 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,592	126.9	2010	7,977	281.7
2015	3,692	130.4	2015	8,349	294.9
2020	3,735	131.9	2020	8,632	304.9
2025	3,727	132.2	2025	8,830	313.3
2030	3,683	132.0	2030	8,981	322.0
Percent change 2006-2030	7.0%	8.6%	Percent change 2006-2030	17.0%	18.7%
Annualized change 2006-2030	0.28%	0.34%	Annualized change 2006-2030	0.65%	0.72%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 323– Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,592	126.9	2010	833	29.4
2015	3,692	130.4	2015	857	30.3
2020	3,735	131.9	2020	860	30.4
2025	3,727	132.2	2025	845	30.0
2030	3,683	132.0	2030	817	29.3
Percent change 2006-2030	7.0%	8.6%	Percent change 2006-2030	0.8%	2.4%
Annualized change 2006-2030	0.28%	0.34%	Annualized change 2006-2030	0.03%	0.10%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,799	63.5	2010	960	33.9
2015	1,842	65.1	2015	993	35.1
2020	1,857	65.6	2020	1,019	36.0
2025	1,845	65.5	2025	1,037	36.8
2030	1,815	65.1	2030	1,052	37.7
Percent change 2006-2030	6.1%	7.7%	Percent change 2006-2030	13.9%	15.6%
Annualized change 2006-2030	0.25%	0.31%	Annualized change 2006-2030	0.54%	0.61%

Non-Primary Care Specialties

Figure 324 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	491	17.3
2015	534	18.9
2020	570	20.2
2025	600	21.3
2030	628	22.5
Percent change 2006-2030	34.3%	36.3%
Annualized change 2006-2030	1.24%	1.30%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,586	56.0
2015	1,763	62.3
2020	1,920	67.8
2025	2,053	72.8
2030	2,173	77.9
Percent change 2006-2030	47.2%	49.5%
Annualized change 2006-2030	1.63%	1.69%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	581	20.5
2015	600	21.2
2020	609	21.5
2025	610	21.7
2030	608	21.8
Percent change 2006-2030	7.7%	9.4%
Annualized change 2006-2030	0.31%	0.37%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	246	8.7
2015	235	8.3
2020	224	7.9
2025	211	7.5
2030	198	7.1
Percent change 2006-2030	-23.2%	-22.0%
Annualized change 2006-2030	-1.09%	-1.03%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	647	22.9
2015	641	22.6
2020	618	21.8
2025	593	21.0
2030	570	20.5
Percent change 2006-2030	-12.9%	-11.6%
Annualized change 2006-2030	-0.57%	-0.51%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	708	25.0
2015	718	25.3
2020	748	26.4
2025	767	27.2
2030	773	27.7
Percent change 2006-2030	13.3%	15.1%
Annualized change 2006-2030	0.52%	0.59%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	628	22.2
2015	664	23.5
2020	687	24.3
2025	703	24.9
2030	716	25.7
Percent change 2006-2030	22.0%	23.8%
Annualized change 2006-2030	0.83%	0.89%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	437	15.4
2015	497	17.6
2020	551	19.5
2025	599	21.3
2030	638	22.9
Percent change 2006-2030	61.2%	63.6%
Annualized change 2006-2030	2.01%	2.07%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	390	13.8
2015	412	14.5
2020	424	15.0
2025	436	15.5
2030	446	16.0
Percent change 2006-2030	20.2%	22.0%
Annualized change 2006-2030	0.77%	0.83%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	288	10.2
2015	279	9.9
2020	269	9.5
2025	256	9.1
2030	245	8.8
Percent change 2006-2030	-16.9%	-15.6%
Annualized change 2006-2030	-0.77%	-0.71%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	115	4.1
2020	113	4.0
2025	112	4.0
2030	109	3.9
Percent change 2006-2030	-3.7%	-2.2%
Annualized change 2006-2030	-0.16%	-0.09%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	316	11.2
2015	326	11.5
2020	334	11.8
2025	340	12.1
2030	345	12.4
Percent change 2006-2030	13.2%	14.9%
Annualized change 2006-2030	0.52%	0.58%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	161	5.7
2015	155	5.5
2020	148	5.2
2025	143	5.1
2030	137	4.9
Percent change 2006-2030	-16.7%	-15.5%
Annualized change 2006-2030	-0.76%	-0.70%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	209	7.4
2015	206	7.3
2020	202	7.1
2025	196	6.9
2030	188	6.7
Percent change 2006-2030	-10.9%	-9.6%
Annualized change 2006-2030	-0.48%	-0.42%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,173	41.4
2015	1,205	42.6
2020	1,213	42.9
2025	1,210	42.9
2030	1,205	43.2
Percent change 2006-2030	6.4%	8.0%
Annualized change 2006-2030	0.26%	0.32%

Long Island Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 325 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,476	405.3
2015	11,789	416.4
2020	11,950	422.2
2025	11,985	425.2
2030	11,915	427.2
Percent change 2006-2030	7.1%	8.7%
Annualized change 2006-2030	0.29%	0.35%

Figure 326 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,550	125.4	2010	7,926	280.0
2015	3,587	126.7	2015	8,201	289.7
2020	3,584	126.6	2020	8,366	295.6
2025	3,541	125.6	2025	8,444	299.5
2030	3,455	123.8	2030	8,460	303.3
Percent change 2006-2030	0.3%	1.8%	Percent change 2006-2030	10.2%	11.8%
Annualized change 2006-2030	0.01%	0.08%	Annualized change 2006-2030	0.40%	0.47%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 327– Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,550	125.4	2010	831	29.3
2015	3,587	126.7	2015	848	30.0
2020	3,584	126.6	2020	845	29.9
2025	3,541	125.6	2025	824	29.2
2030	3,455	123.8	2030	790	28.3
Percent change 2006-2030	0.3%	1.8%	Percent change 2006-2030	-2.5%	-1.0%
Annualized change 2006-2030	0.01%	0.08%	Annualized change 2006-2030	-0.11%	-0.04%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,788	63.1	2010	932	32.9
2015	1,804	63.7	2015	935	33.0
2020	1,791	63.3	2020	948	33.5
2025	1,752	62.2	2025	965	34.2
2030	1,693	60.7	2030	971	34.8
Percent change 2006-2030	-1.0%	0.5%	Percent change 2006-2030	5.3%	6.8%
Annualized change 2006-2030	-0.04%	0.02%	Annualized change 2006-2030	0.21%	0.28%

Non-Primary Care Specialties

Figure 328 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	488	17.2
2015	524	18.5
2020	551	19.5
2025	571	20.3
2030	590	21.1
Percent change 2006-2030	26.0%	27.9%
Annualized change 2006-2030	0.97%	1.03%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,576	55.7
2015	1,728	61.0
2020	1,854	65.5
2025	1,953	69.3
2030	2,035	72.9
Percent change 2006-2030	37.9%	39.9%
Annualized change 2006-2030	1.35%	1.41%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	579	20.5
2015	597	21.1
2020	600	21.2
2025	593	21.0
2030	580	20.8
Percent change 2006-2030	2.9%	4.4%
Annualized change 2006-2030	0.12%	0.18%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	245	8.7
2015	232	8.2
2020	218	7.7
2025	204	7.2
2030	188	6.8
Percent change 2006-2030	-27.0%	-25.9%
Annualized change 2006-2030	-1.30%	-1.24%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	641	22.6
2015	625	22.1
2020	593	21.0
2025	559	19.8
2030	527	18.9
Percent change 2006-2030	-19.5%	-18.3%
Annualized change 2006-2030	-0.90%	-0.84%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	704	24.9
2015	706	24.9
2020	727	25.7
2025	738	26.2
2030	734	26.3
Percent change 2006-2030	7.6%	9.2%
Annualized change 2006-2030	0.31%	0.37%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	625	22.1
2015	653	23.1
2020	668	23.6
2025	676	24.0
2030	680	24.4
Percent change 2006-2030	15.8%	17.5%
Annualized change 2006-2030	0.61%	0.68%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	433	15.3
2015	486	17.2
2020	534	18.9
2025	572	20.3
2030	601	21.6
Percent change 2006-2030	51.9%	54.1%
Annualized change 2006-2030	1.76%	1.82%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	387	13.7
2015	405	14.3
2020	411	14.5
2025	417	14.8
2030	420	15.1
Percent change 2006-2030	13.3%	15.0%
Annualized change 2006-2030	0.52%	0.58%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	286	10.1
2015	274	9.7
2020	260	9.2
2025	245	8.7
2030	231	8.3
Percent change 2006-2030	-21.6%	-20.4%
Annualized change 2006-2030	-1.01%	-0.95%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	113	4.0
2020	109	3.8
2025	107	3.8
2030	102	3.7
Percent change 2006-2030	-9.4%	-8.1%
Annualized change 2006-2030	-0.41%	-0.35%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	315	11.1
2015	322	11.4
2020	326	11.5
2025	328	11.6
2030	330	11.8
Percent change 2006-2030	8.1%	9.8%
Annualized change 2006-2030	0.33%	0.39%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	159	5.6
2015	152	5.4
2020	143	5.1
2025	136	4.8
2030	129	4.6
Percent change 2006-2030	-21.6%	-20.5%
Annualized change 2006-2030	-1.01%	-0.95%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	208	7.4
2015	202	7.1
2020	196	6.9
2025	187	6.6
2030	177	6.3
Percent change 2006-2030	-16.1%	-14.9%
Annualized change 2006-2030	-0.73%	-0.67%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,166	41.2
2015	1,184	41.8
2020	1,177	41.6
2025	1,158	41.1
2030	1,135	40.7
Percent change 2006-2030	0.2%	1.7%
Annualized change 2006-2030	0.01%	0.07%

Long Island Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 329 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,569	408.6
2015	12,042	425.3
2020	12,367	436.9
2025	12,557	445.5
2030	12,664	454.0
Percent change 2006-2030	13.9%	15.6%
Annualized change 2006-2030	0.54%	0.61%

Figure 330 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,592	126.9	2010	7,977	281.8
2015	3,688	130.2	2015	8,354	295.1
2020	3,727	131.7	2020	8,640	305.2
2025	3,715	131.8	2025	8,842	313.7
2030	3,668	131.5	2030	8,996	322.5
Percent change 2006-2030	6.5%	8.1%	Percent change 2006-2030	17.2%	18.9%
Annualized change 2006-2030	0.26%	0.33%	Annualized change 2006-2030	0.66%	0.72%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 331 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,592	126.9	2010	833	29.4
2015	3,688	130.2	2015	856	30.2
2020	3,727	131.7	2020	858	30.3
2025	3,715	131.8	2025	843	29.9
2030	3,668	131.5	2030	814	29.2
Percent change 2006-2030	6.5%	8.1%	Percent change 2006-2030	0.4%	1.9%
Annualized change 2006-2030	0.26%	0.33%	Annualized change 2006-2030	0.02%	0.08%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,798	63.5	2010	960	33.9
2015	1,840	65.0	2015	992	35.0
2020	1,853	65.4	2020	1,016	35.9
2025	1,839	65.2	2025	1,033	36.7
2030	1,807	64.8	2030	1,047	37.5
Percent change 2006-2030	5.7%	7.3%	Percent change 2006-2030	13.5%	15.2%
Annualized change 2006-2030	0.23%	0.29%	Annualized change 2006-2030	0.53%	0.59%

Non-Primary Care Specialties

Figure 332 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	491	17.3
2015	535	18.9
2020	571	20.2
2025	600	21.3
2030	630	22.6
Percent change 2006-2030	34.5%	36.5%
Annualized change 2006-2030	1.24%	1.31%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,586	56.0
2015	1,764	62.3
2020	1,922	67.9
2025	2,055	72.9
2030	2,177	78.0
Percent change 2006-2030	47.5%	49.7%
Annualized change 2006-2030	1.63%	1.70%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	581	20.5
2015	601	21.2
2020	610	21.5
2025	611	21.7
2030	609	21.8
Percent change 2006-2030	7.9%	9.5%
Annualized change 2006-2030	0.32%	0.38%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	246	8.7
2015	235	8.3
2020	224	7.9
2025	212	7.5
2030	199	7.1
Percent change 2006-2030	-23.0%	-21.9%
Annualized change 2006-2030	-1.08%	-1.02%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	647	22.9
2015	641	22.6
2020	619	21.9
2025	594	21.1
2030	571	20.5
Percent change 2006-2030	-12.8%	-11.4%
Annualized change 2006-2030	-0.57%	-0.51%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	708	25.0
2015	718	25.4
2020	749	26.5
2025	768	27.3
2030	774	27.8
Percent change 2006-2030	13.5%	15.2%
Annualized change 2006-2030	0.53%	0.59%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	628	22.2
2015	664	23.5
2020	687	24.3
2025	704	25.0
2030	717	25.7
Percent change 2006-2030	22.2%	24.0%
Annualized change 2006-2030	0.84%	0.90%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	437	15.4
2015	497	17.6
2020	552	19.5
2025	600	21.3
2030	639	22.9
Percent change 2006-2030	61.5%	63.9%
Annualized change 2006-2030	2.02%	2.08%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	391	13.8
2015	412	14.6
2020	425	15.0
2025	437	15.5
2030	447	16.0
Percent change 2006-2030	20.4%	22.2%
Annualized change 2006-2030	0.78%	0.84%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	288	10.2
2015	279	9.9
2020	269	9.5
2025	256	9.1
2030	246	8.8
Percent change 2006-2030	-16.7%	-15.5%
Annualized change 2006-2030	-0.76%	-0.70%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	115	4.1
2020	113	4.0
2025	112	4.0
2030	109	3.9
Percent change 2006-2030	-3.5%	-2.0%
Annualized change 2006-2030	-0.15%	-0.09%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	316	11.2
2015	326	11.5
2020	334	11.8
2025	340	12.1
2030	346	12.4
Percent change 2006-2030	13.4%	15.1%
Annualized change 2006-2030	0.52%	0.59%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	161	5.7
2015	155	5.5
2020	148	5.2
2025	143	5.1
2030	138	4.9
Percent change 2006-2030	-16.6%	-15.3%
Annualized change 2006-2030	-0.75%	-0.69%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	209	7.4
2015	206	7.3
2020	202	7.1
2025	196	7.0
2030	188	6.7
Percent change 2006-2030	-10.8%	-9.5%
Annualized change 2006-2030	-0.48%	-0.41%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,173	41.4
2015	1,206	42.6
2020	1,215	42.9
2025	1,212	43.0
2030	1,207	43.3
Percent change 2006-2030	6.5%	8.1%
Annualized change 2006-2030	0.26%	0.33%

Long Island Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 333 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,476	405.3
2015	11,789	416.4
2020	11,950	422.2
2025	11,985	425.2
2030	11,915	427.2
Percent change 2006-2030	7.1%	8.7%
Annualized change 2006-2030	0.29%	0.35%

Figure 334 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,549	125.4	2010	7,927	280.0
2015	3,583	126.6	2015	8,206	289.8
2020	3,576	126.3	2020	8,374	295.8
2025	3,530	125.2	2025	8,455	299.9
2030	3,441	123.3	2030	8,474	303.8
Percent change 2006-2030	-0.1%	1.4%	Percent change 2006-2030	10.4%	12.0%
Annualized change 2006-2030	0.00%	0.06%	Annualized change 2006-2030	0.41%	0.47%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 335 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,549	125.4	2010	830	29.3
2015	3,583	126.6	2015	847	29.9
2020	3,576	126.3	2020	843	29.8
2025	3,530	125.2	2025	822	29.2
2030	3,441	123.3	2030	787	28.2
Percent change 2006-2030	-0.1%	1.4%	Percent change 2006-2030	-2.9%	-1.4%
Annualized change 2006-2030	0.00%	0.06%	Annualized change 2006-2030	-0.12%	-0.06%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,787	63.1	2010	932	32.9
2015	1,802	63.6	2015	934	33.0
2020	1,787	63.1	2020	946	33.4
2025	1,747	62.0	2025	962	34.1
2030	1,686	60.5	2030	968	34.7
Percent change 2006-2030	-1.4%	0.1%	Percent change 2006-2030	4.8%	6.4%
Annualized change 2006-2030	-0.06%	0.00%	Annualized change 2006-2030	0.20%	0.26%

Non-Primary Care Specialties

Figure 336 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	488	17.2
2015	524	18.5
2020	551	19.5
2025	572	20.3
2030	591	21.2
Percent change 2006-2030	26.2%	28.1%
Annualized change 2006-2030	0.97%	1.04%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,576	55.7
2015	1,729	61.1
2020	1,856	65.6
2025	1,956	69.4
2030	2,038	73.1
Percent change 2006-2030	38.1%	40.2%
Annualized change 2006-2030	1.35%	1.42%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	579	20.5
2015	597	21.1
2020	601	21.2
2025	593	21.1
2030	581	20.8
Percent change 2006-2030	3.0%	4.6%
Annualized change 2006-2030	0.13%	0.19%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	245	8.7
2015	232	8.2
2020	218	7.7
2025	204	7.2
2030	189	6.8
Percent change 2006-2030	-26.8%	-25.7%
Annualized change 2006-2030	-1.29%	-1.23%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	641	22.6
2015	626	22.1
2020	594	21.0
2025	560	19.9
2030	528	18.9
Percent change 2006-2030	-19.4%	-18.2%
Annualized change 2006-2030	-0.89%	-0.83%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	704	24.9
2015	706	24.9
2020	728	25.7
2025	738	26.2
2030	735	26.4
Percent change 2006-2030	7.8%	9.4%
Annualized change 2006-2030	0.31%	0.38%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	625	22.1
2015	653	23.1
2020	668	23.6
2025	677	24.0
2030	681	24.4
Percent change 2006-2030	16.0%	17.7%
Annualized change 2006-2030	0.62%	0.68%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	433	15.3
2015	486	17.2
2020	534	18.9
2025	573	20.3
2030	602	21.6
Percent change 2006-2030	52.1%	54.4%
Annualized change 2006-2030	1.76%	1.83%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	387	13.7
2015	405	14.3
2020	411	14.5
2025	417	14.8
2030	421	15.1
Percent change 2006-2030	13.5%	15.2%
Annualized change 2006-2030	0.53%	0.59%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	286	10.1
2015	274	9.7
2020	260	9.2
2025	245	8.7
2030	232	8.3
Percent change 2006-2030	-21.5%	-20.3%
Annualized change 2006-2030	-1.00%	-0.94%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	113	4.0
2020	109	3.9
2025	107	3.8
2030	103	3.7
Percent change 2006-2030	-9.3%	-7.9%
Annualized change 2006-2030	-0.40%	-0.34%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	315	11.1
2015	322	11.4
2020	326	11.5
2025	329	11.7
2030	330	11.8
Percent change 2006-2030	8.3%	9.9%
Annualized change 2006-2030	0.33%	0.40%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	159	5.6
2015	152	5.4
2020	143	5.1
2025	136	4.8
2030	130	4.6
Percent change 2006-2030	-21.5%	-20.3%
Annualized change 2006-2030	-1.00%	-0.94%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	208	7.4
2015	202	7.1
2020	196	6.9
2025	187	6.6
2030	177	6.4
Percent change 2006-2030	-16.0%	-14.7%
Annualized change 2006-2030	-0.72%	-0.66%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,166	41.2
2015	1,185	41.8
2020	1,178	41.6
2025	1,160	41.1
2030	1,137	40.8
Percent change 2006-2030	0.4%	1.9%
Annualized change 2006-2030	0.02%	0.08%

Long Island Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 337 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,539	407.6
2015	11,865	419.1
2020	12,042	425.4
2025	12,085	428.7
2030	12,075	432.9
Percent change 2006-2030	8.6%	10.2%
Annualized change 2006-2030	0.34%	0.41%

Figure 338 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,584	126.6	2010	7,956	281.0
2015	3,641	128.6	2015	8,224	290.5
2020	3,640	128.6	2020	8,402	296.8
2025	3,589	127.3	2025	8,496	301.4
2030	3,511	125.9	2030	8,564	307.0
Percent change 2006-2030	2.0%	3.5%	Percent change 2006-2030	11.5%	13.2%
Annualized change 2006-2030	0.08%	0.14%	Annualized change 2006-2030	0.46%	0.52%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 339 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,584	126.6	2010	831	29.4
2015	3,641	128.6	2015	845	29.8
2020	3,640	128.6	2020	838	29.6
2025	3,589	127.3	2025	814	28.9
2030	3,511	125.9	2030	779	27.9
Percent change 2006-2030	2.0%	3.5%	Percent change 2006-2030	-3.9%	-2.4%
Annualized change 2006-2030	0.08%	0.14%	Annualized change 2006-2030	-0.16%	-0.10%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,795	63.4	2010	958	33.8
2015	1,816	64.1	2015	979	34.6
2020	1,809	63.9	2020	993	35.1
2025	1,777	63.0	2025	998	35.4
2030	1,730	62.0	2030	1,002	35.9
Percent change 2006-2030	1.2%	2.7%	Percent change 2006-2030	8.6%	10.2%
Annualized change 2006-2030	0.05%	0.11%	Annualized change 2006-2030	0.34%	0.41%

Non-Primary Care Specialties

Figure 340 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	490	17.3
2015	526	18.6
2020	555	19.6
2025	577	20.5
2030	599	21.5
Percent change 2006-2030	28.0%	30.0%
Annualized change 2006-2030	1.04%	1.10%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,582	55.9
2015	1,737	61.3
2020	1,869	66.0
2025	1,975	70.1
2030	2,072	74.3
Percent change 2006-2030	40.4%	42.5%
Annualized change 2006-2030	1.42%	1.49%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	580	20.5
2015	591	20.9
2020	593	20.9
2025	587	20.8
2030	579	20.8
Percent change 2006-2030	2.7%	4.3%
Annualized change 2006-2030	0.11%	0.17%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	246	8.7
2015	232	8.2
2020	218	7.7
2025	203	7.2
2030	189	6.8
Percent change 2006-2030	-26.7%	-25.6%
Annualized change 2006-2030	-1.29%	-1.23%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	646	22.8
2015	631	22.3
2020	602	21.3
2025	570	20.2
2030	544	19.5
Percent change 2006-2030	-17.0%	-15.7%
Annualized change 2006-2030	-0.77%	-0.71%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	706	24.9
2015	707	25.0
2020	729	25.7
2025	738	26.2
2030	737	26.4
Percent change 2006-2030	8.1%	9.7%
Annualized change 2006-2030	0.32%	0.39%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	627	22.1
2015	654	23.1
2020	668	23.6
2025	677	24.0
2030	683	24.5
Percent change 2006-2030	16.3%	18.0%
Annualized change 2006-2030	0.63%	0.69%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	436	15.4
2015	490	17.3
2020	537	19.0
2025	577	20.5
2030	609	21.8
Percent change 2006-2030	53.7%	56.0%
Annualized change 2006-2030	1.81%	1.87%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	389	13.8
2015	406	14.3
2020	413	14.6
2025	420	14.9
2030	425	15.2
Percent change 2006-2030	14.6%	16.4%
Annualized change 2006-2030	0.57%	0.63%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	287	10.1
2015	275	9.7
2020	262	9.2
2025	246	8.7
2030	234	8.4
Percent change 2006-2030	-20.7%	-19.5%
Annualized change 2006-2030	-0.96%	-0.90%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	113	4.0
2020	110	3.9
2025	108	3.8
2030	104	3.7
Percent change 2006-2030	-8.1%	-6.8%
Annualized change 2006-2030	-0.35%	-0.29%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	315	11.1
2015	321	11.3
2020	325	11.5
2025	327	11.6
2030	329	11.8
Percent change 2006-2030	7.9%	9.5%
Annualized change 2006-2030	0.32%	0.38%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	160	5.7
2015	153	5.4
2020	144	5.1
2025	138	4.9
2030	131	4.7
Percent change 2006-2030	-20.6%	-19.4%
Annualized change 2006-2030	-0.96%	-0.89%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	209	7.4
2015	203	7.2
2020	197	6.9
2025	188	6.7
2030	179	6.4
Percent change 2006-2030	-15.1%	-13.8%
Annualized change 2006-2030	-0.68%	-0.62%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,170	41.3
2015	1,187	41.9
2020	1,181	41.7
2025	1,165	41.3
2030	1,149	41.2
Percent change 2006-2030	1.4%	2.9%
Annualized change 2006-2030	0.06%	0.12%

Long Island Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 341 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,448	404.3
2015	11,621	410.4
2020	11,641	411.3
2025	11,536	409.2
2030	11,354	407.0
Percent change 2006-2030	2.1%	3.6%
Annualized change 2006-2030	0.09%	0.15%

Figure 342 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,542	125.1	2010	7,906	279.2
2015	3,538	125.0	2015	8,082	285.5
2020	3,494	123.4	2020	8,147	287.8
2025	3,410	121.0	2025	8,126	288.3
2030	3,291	118.0	2030	8,063	289.0
Percent change 2006-2030	-4.4%	-3.0%	Percent change 2006-2030	5.0%	6.6%
Annualized change 2006-2030	-0.19%	-0.13%	Annualized change 2006-2030	0.20%	0.27%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 343 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,542	125.1	2010	829	29.3
2015	3,538	125.0	2015	837	29.6
2020	3,494	123.4	2020	824	29.1
2025	3,410	121.0	2025	794	28.2
2030	3,291	118.0	2030	752	27.0
Percent change 2006-2030	-4.4%	-3.0%	Percent change 2006-2030	-7.1%	-5.7%
Annualized change 2006-2030	-0.19%	-0.13%	Annualized change 2006-2030	-0.31%	-0.24%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,784	63.0	2010	930	32.8
2015	1,779	62.9	2015	922	32.6
2020	1,745	61.7	2020	924	32.7
2025	1,687	59.9	2025	929	33.0
2030	1,613	57.8	2030	925	33.2
Percent change 2006-2030	-5.7%	-4.2%	Percent change 2006-2030	0.3%	1.8%
Annualized change 2006-2030	-0.24%	-0.18%	Annualized change 2006-2030	0.01%	0.07%

Non-Primary Care Specialties

Figure 344 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	487	17.2
2015	516	18.2
2020	536	18.9
2025	549	19.5
2030	562	20.1
Percent change 2006-2030	20.1%	21.9%
Annualized change 2006-2030	0.77%	0.83%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,572	55.5
2015	1,703	60.2
2020	1,806	63.8
2025	1,880	66.7
2030	1,939	69.5
Percent change 2006-2030	31.4%	33.4%
Annualized change 2006-2030	1.14%	1.21%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	578	20.4
2015	588	20.8
2020	585	20.7
2025	570	20.2
2030	553	19.8
Percent change 2006-2030	-2.0%	-0.5%
Annualized change 2006-2030	-0.08%	-0.02%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	245	8.6
2015	228	8.1
2020	213	7.5
2025	196	7.0
2030	180	6.4
Percent change 2006-2030	-30.4%	-29.4%
Annualized change 2006-2030	-1.50%	-1.44%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	639	22.6
2015	616	21.8
2020	578	20.4
2025	538	19.1
2030	502	18.0
Percent change 2006-2030	-23.3%	-22.2%
Annualized change 2006-2030	-1.10%	-1.04%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	702	24.8
2015	696	24.6
2020	708	25.0
2025	710	25.2
2030	699	25.1
Percent change 2006-2030	2.6%	4.1%
Annualized change 2006-2030	0.11%	0.17%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	623	22.0
2015	644	22.7
2020	650	23.0
2025	651	23.1
2030	648	23.2
Percent change 2006-2030	10.3%	12.0%
Annualized change 2006-2030	0.41%	0.47%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	432	15.2
2015	479	16.9
2020	520	18.4
2025	551	19.5
2030	573	20.5
Percent change 2006-2030	44.7%	46.9%
Annualized change 2006-2030	1.55%	1.62%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	386	13.6
2015	399	14.1
2020	400	14.1
2025	401	14.2
2030	400	14.4
Percent change 2006-2030	7.9%	9.6%
Annualized change 2006-2030	0.32%	0.38%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	285	10.1
2015	270	9.5
2020	253	8.9
2025	236	8.4
2030	220	7.9
Percent change 2006-2030	-25.3%	-24.2%
Annualized change 2006-2030	-1.21%	-1.15%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	112	4.0
2015	111	3.9
2020	106	3.7
2025	103	3.7
2030	98	3.5
Percent change 2006-2030	-13.7%	-12.4%
Annualized change 2006-2030	-0.61%	-0.55%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	314	11.1
2015	317	11.2
2020	317	11.2
2025	316	11.2
2030	314	11.3
Percent change 2006-2030	3.0%	4.6%
Annualized change 2006-2030	0.13%	0.19%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	159	5.6
2015	150	5.3
2020	139	4.9
2025	131	4.6
2030	123	4.4
Percent change 2006-2030	-25.3%	-24.2%
Annualized change 2006-2030	-1.21%	-1.15%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	208	7.3
2015	199	7.0
2020	190	6.7
2025	180	6.4
2030	169	6.0
Percent change 2006-2030	-20.1%	-18.9%
Annualized change 2006-2030	-0.93%	-0.87%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,163	41.1
2015	1,167	41.2
2020	1,146	40.5
2025	1,115	39.5
2030	1,082	38.8
Percent change 2006-2030	-4.5%	-3.1%
Annualized change 2006-2030	-0.19%	-0.13%

Long Island Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 345 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,539	407.6
2015	11,865	419.1
2020	12,042	425.4
2025	12,085	428.7
2030	12,075	432.9
Percent change 2006-2030	8.6%	10.2%
Annualized change 2006-2030	0.34%	0.41%

Figure 346 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,585	126.6	2010	7,955	281.0
2015	3,648	128.8	2015	8,217	290.2
2020	3,654	129.1	2020	8,389	296.4
2025	3,609	128.0	2025	8,477	300.7
2030	3,536	126.8	2030	8,539	306.1
Percent change 2006-2030	2.7%	4.2%	Percent change 2006-2030	11.2%	12.9%
Annualized change 2006-2030	0.11%	0.17%	Annualized change 2006-2030	0.44%	0.51%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 347 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,585	126.6	2010	832	29.4
2015	3,648	128.8	2015	847	29.9
2020	3,654	129.1	2020	841	29.7
2025	3,609	128.0	2025	818	29.0
2030	3,536	126.8	2030	784	28.1
Percent change 2006-2030	2.7%	4.2%	Percent change 2006-2030	-3.2%	-1.7%
Annualized change 2006-2030	0.11%	0.17%	Annualized change 2006-2030	-0.14%	-0.07%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,795	63.4	2010	958	33.8
2015	1,820	64.3	2015	981	34.7
2020	1,816	64.2	2020	997	35.2
2025	1,787	63.4	2025	1,004	35.6
2030	1,742	62.4	2030	1,009	36.2
Percent change 2006-2030	1.9%	3.4%	Percent change 2006-2030	9.4%	11.0%
Annualized change 2006-2030	0.08%	0.14%	Annualized change 2006-2030	0.37%	0.44%

Non-Primary Care Specialties

Figure 348 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	490	17.3
2015	526	18.6
2020	554	19.6
2025	576	20.4
2030	598	21.4
Percent change 2006-2030	27.7%	29.6%
Annualized change 2006-2030	1.02%	1.09%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,582	55.9
2015	1,735	61.3
2020	1,866	65.9
2025	1,970	69.9
2030	2,066	74.1
Percent change 2006-2030	40.0%	42.1%
Annualized change 2006-2030	1.41%	1.47%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	580	20.5
2015	591	20.9
2020	592	20.9
2025	586	20.8
2030	578	20.7
Percent change 2006-2030	2.4%	4.0%
Annualized change 2006-2030	0.10%	0.16%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	246	8.7
2015	232	8.2
2020	218	7.7
2025	203	7.2
2030	188	6.8
Percent change 2006-2030	-26.9%	-25.8%
Annualized change 2006-2030	-1.30%	-1.24%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	646	22.8
2015	631	22.3
2020	601	21.2
2025	569	20.2
2030	542	19.4
Percent change 2006-2030	-17.2%	-15.9%
Annualized change 2006-2030	-0.78%	-0.72%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	706	24.9
2015	706	24.9
2020	727	25.7
2025	736	26.1
2030	735	26.3
Percent change 2006-2030	7.8%	9.4%
Annualized change 2006-2030	0.31%	0.37%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	627	22.1
2015	653	23.1
2020	667	23.6
2025	675	23.9
2030	681	24.4
Percent change 2006-2030	16.0%	17.7%
Annualized change 2006-2030	0.62%	0.68%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	436	15.4
2015	489	17.3
2020	536	18.9
2025	575	20.4
2030	607	21.8
Percent change 2006-2030	53.3%	55.6%
Annualized change 2006-2030	1.80%	1.86%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	389	13.8
2015	405	14.3
2020	412	14.6
2025	419	14.9
2030	424	15.2
Percent change 2006-2030	14.3%	16.0%
Annualized change 2006-2030	0.56%	0.62%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	287	10.1
2015	275	9.7
2020	261	9.2
2025	246	8.7
2030	233	8.4
Percent change 2006-2030	-21.0%	-19.8%
Annualized change 2006-2030	-0.98%	-0.91%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	113	4.0
2020	110	3.9
2025	108	3.8
2030	104	3.7
Percent change 2006-2030	-8.4%	-7.0%
Annualized change 2006-2030	-0.36%	-0.30%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	315	11.1
2015	321	11.3
2020	324	11.5
2025	326	11.6
2030	328	11.8
Percent change 2006-2030	7.6%	9.2%
Annualized change 2006-2030	0.31%	0.37%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	160	5.7
2015	153	5.4
2020	144	5.1
2025	137	4.9
2030	131	4.7
Percent change 2006-2030	-20.8%	-19.6%
Annualized change 2006-2030	-0.97%	-0.91%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	209	7.4
2015	203	7.2
2020	196	6.9
2025	188	6.7
2030	179	6.4
Percent change 2006-2030	-15.3%	-14.1%
Annualized change 2006-2030	-0.69%	-0.63%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,170	41.3
2015	1,186	41.9
2020	1,179	41.7
2025	1,162	41.2
2030	1,146	41.1
Percent change 2006-2030	1.1%	2.7%
Annualized change 2006-2030	0.05%	0.11%

Long Island Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 349 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,448	404.3
2015	11,621	410.4
2020	11,641	411.3
2025	11,536	409.2
2030	11,354	407.0
Percent change 2006-2030	2.1%	3.6%
Annualized change 2006-2030	0.09%	0.15%

Figure 350 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,543	125.1	2010	7,905	279.2
2015	3,545	125.2	2015	8,075	285.2
2020	3,506	123.9	2020	8,135	287.4
2025	3,429	121.7	2025	8,107	287.6
2030	3,314	118.8	2030	8,039	288.2
Percent change 2006-2030	-3.7%	-2.3%	Percent change 2006-2030	4.7%	6.3%
Annualized change 2006-2030	-0.16%	-0.10%	Annualized change 2006-2030	0.19%	0.25%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 351 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,543	125.1	2010	829	29.3
2015	3,545	125.2	2015	838	29.6
2020	3,506	123.9	2020	827	29.2
2025	3,429	121.7	2025	798	28.3
2030	3,314	118.8	2030	758	27.2
Percent change 2006-2030	-3.7%	-2.3%	Percent change 2006-2030	-6.5%	-5.0%
Annualized change 2006-2030	-0.16%	-0.10%	Annualized change 2006-2030	-0.28%	-0.22%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,784	63.0	2010	930	32.8
2015	1,783	63.0	2015	924	32.6
2020	1,752	61.9	2020	928	32.8
2025	1,697	60.2	2025	934	33.1
2030	1,625	58.2	2030	932	33.4
Percent change 2006-2030	-5.0%	-3.6%	Percent change 2006-2030	1.0%	2.5%
Annualized change 2006-2030	-0.21%	-0.15%	Annualized change 2006-2030	0.04%	0.10%

Non-Primary Care Specialties

Figure 352 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	487	17.2
2015	516	18.2
2020	535	18.9
2025	548	19.4
2030	560	20.1
Percent change 2006-2030	19.7%	21.5%
Annualized change 2006-2030	0.75%	0.82%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,572	55.5
2015	1,702	60.1
2020	1,803	63.7
2025	1,875	66.5
2030	1,934	69.3
Percent change 2006-2030	31.0%	33.0%
Annualized change 2006-2030	1.13%	1.19%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	578	20.4
2015	588	20.8
2020	584	20.6
2025	569	20.2
2030	551	19.8
Percent change 2006-2030	-2.2%	-0.8%
Annualized change 2006-2030	-0.09%	-0.03%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	245	8.6
2015	228	8.1
2020	212	7.5
2025	196	6.9
2030	179	6.4
Percent change 2006-2030	-30.6%	-29.6%
Annualized change 2006-2030	-1.51%	-1.45%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	639	22.6
2015	616	21.7
2020	577	20.4
2025	537	19.1
2030	501	18.0
Percent change 2006-2030	-23.5%	-22.4%
Annualized change 2006-2030	-1.11%	-1.05%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	702	24.8
2015	695	24.5
2020	707	25.0
2025	708	25.1
2030	697	25.0
Percent change 2006-2030	2.3%	3.8%
Annualized change 2006-2030	0.09%	0.16%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	623	22.0
2015	643	22.7
2020	649	22.9
2025	649	23.0
2030	646	23.2
Percent change 2006-2030	10.0%	11.7%
Annualized change 2006-2030	0.40%	0.46%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	432	15.2
2015	478	16.9
2020	519	18.3
2025	549	19.5
2030	571	20.5
Percent change 2006-2030	44.3%	46.5%
Annualized change 2006-2030	1.54%	1.60%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	386	13.6
2015	398	14.1
2020	399	14.1
2025	400	14.2
2030	399	14.3
Percent change 2006-2030	7.6%	9.2%
Annualized change 2006-2030	0.31%	0.37%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	285	10.1
2015	270	9.5
2020	253	8.9
2025	235	8.3
2030	220	7.9
Percent change 2006-2030	-25.5%	-24.4%
Annualized change 2006-2030	-1.22%	-1.16%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	112	4.0
2015	111	3.9
2020	106	3.7
2025	103	3.7
2030	97	3.5
Percent change 2006-2030	-13.9%	-12.6%
Annualized change 2006-2030	-0.62%	-0.56%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	314	11.1
2015	317	11.2
2020	317	11.2
2025	315	11.2
2030	313	11.2
Percent change 2006-2030	2.8%	4.3%
Annualized change 2006-2030	0.11%	0.18%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	159	5.6
2015	149	5.3
2020	139	4.9
2025	131	4.6
2030	123	4.4
Percent change 2006-2030	-25.5%	-24.4%
Annualized change 2006-2030	-1.22%	-1.16%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	208	7.3
2015	199	7.0
2020	190	6.7
2025	179	6.4
2030	168	6.0
Percent change 2006-2030	-20.3%	-19.1%
Annualized change 2006-2030	-0.94%	-0.88%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,163	41.1
2015	1,166	41.2
2020	1,144	40.4
2025	1,112	39.5
2030	1,079	38.7
Percent change 2006-2030	-4.8%	-3.4%
Annualized change 2006-2030	-0.20%	-0.14%

Long Island Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 353 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,539	407.6
2015	11,865	419.1
2020	12,042	425.4
2025	12,085	428.7
2030	12,075	432.9
Percent change 2006-2030	8.6%	10.2%
Annualized change 2006-2030	0.34%	0.41%

Figure 354 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,586	126.6	2010	7,954	280.9
2015	3,652	129.0	2015	8,212	290.1
2020	3,662	129.4	2020	8,381	296.1
2025	3,621	128.4	2025	8,465	300.3
2030	3,550	127.3	2030	8,525	305.6
Percent change 2006-2030	3.1%	4.7%	Percent change 2006-2030	11.0%	12.7%
Annualized change 2006-2030	0.13%	0.19%	Annualized change 2006-2030	0.44%	0.50%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 355 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,586	126.6	2010	832	29.4
2015	3,652	129.0	2015	848	29.9
2020	3,662	129.4	2020	843	29.8
2025	3,621	128.4	2025	821	29.1
2030	3,550	127.3	2030	787	28.2
Percent change 2006-2030	3.1%	4.7%	Percent change 2006-2030	-2.8%	-1.3%
Annualized change 2006-2030	0.13%	0.19%	Annualized change 2006-2030	-0.12%	-0.06%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,796	63.4	2010	958	33.8
2015	1,822	64.4	2015	983	34.7
2020	1,820	64.3	2020	999	35.3
2025	1,792	63.6	2025	1,007	35.7
2030	1,749	62.7	2030	1,014	36.3
Percent change 2006-2030	2.3%	3.8%	Percent change 2006-2030	9.8%	11.5%
Annualized change 2006-2030	0.09%	0.16%	Annualized change 2006-2030	0.39%	0.45%

Non-Primary Care Specialties

Figure 356 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	490	17.3
2015	525	18.6
2020	554	19.6
2025	575	20.4
2030	597	21.4
Percent change 2006-2030	27.5%	29.4%
Annualized change 2006-2030	1.02%	1.08%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,582	55.9
2015	1,734	61.2
2020	1,864	65.9
2025	1,968	69.8
2030	2,063	74.0
Percent change 2006-2030	39.8%	41.9%
Annualized change 2006-2030	1.40%	1.47%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	580	20.5
2015	590	20.9
2020	591	20.9
2025	585	20.8
2030	577	20.7
Percent change 2006-2030	2.3%	3.8%
Annualized change 2006-2030	0.09%	0.16%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	246	8.7
2015	231	8.2
2020	217	7.7
2025	203	7.2
2030	188	6.7
Percent change 2006-2030	-27.1%	-26.0%
Annualized change 2006-2030	-1.31%	-1.25%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	646	22.8
2015	630	22.3
2020	600	21.2
2025	568	20.2
2030	541	19.4
Percent change 2006-2030	-17.3%	-16.1%
Annualized change 2006-2030	-0.79%	-0.73%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	706	24.9
2015	706	24.9
2020	727	25.7
2025	735	26.1
2030	734	26.3
Percent change 2006-2030	7.6%	9.2%
Annualized change 2006-2030	0.31%	0.37%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	627	22.1
2015	653	23.1
2020	667	23.5
2025	674	23.9
2030	680	24.4
Percent change 2006-2030	15.8%	17.5%
Annualized change 2006-2030	0.61%	0.67%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	436	15.4
2015	489	17.3
2020	535	18.9
2025	574	20.4
2030	606	21.7
Percent change 2006-2030	53.0%	55.3%
Annualized change 2006-2030	1.79%	1.85%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	389	13.8
2015	405	14.3
2020	412	14.5
2025	418	14.8
2030	423	15.2
Percent change 2006-2030	14.1%	15.8%
Annualized change 2006-2030	0.55%	0.61%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	287	10.1
2015	274	9.7
2020	261	9.2
2025	245	8.7
2030	233	8.3
Percent change 2006-2030	-21.1%	-19.9%
Annualized change 2006-2030	-0.98%	-0.92%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	113	4.0
2020	110	3.9
2025	108	3.8
2030	103	3.7
Percent change 2006-2030	-8.6%	-7.2%
Annualized change 2006-2030	-0.37%	-0.31%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	315	11.1
2015	320	11.3
2020	324	11.5
2025	326	11.6
2030	328	11.7
Percent change 2006-2030	7.4%	9.0%
Annualized change 2006-2030	0.30%	0.36%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	160	5.7
2015	152	5.4
2020	144	5.1
2025	137	4.9
2030	130	4.7
Percent change 2006-2030	-20.9%	-19.8%
Annualized change 2006-2030	-0.97%	-0.91%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	209	7.4
2015	203	7.2
2020	196	6.9
2025	188	6.7
2030	178	6.4
Percent change 2006-2030	-15.5%	-14.2%
Annualized change 2006-2030	-0.70%	-0.64%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,170	41.3
2015	1,185	41.9
2020	1,178	41.6
2025	1,160	41.2
2030	1,144	41.0
Percent change 2006-2030	1.0%	2.5%
Annualized change 2006-2030	0.04%	0.10%

Long Island Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 357 – Long Island Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	11,122	392.8
2010	11,448	404.3
2015	11,621	410.4
2020	11,641	411.3
2025	11,536	409.2
2030	11,354	407.0
Percent change 2006-2030	2.1%	3.6%
Annualized change 2006-2030	0.09%	0.15%

Figure 358 – Long Island Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,544	125.2	2010	7,904	279.2
2015	3,550	125.4	2015	8,071	285.1
2020	3,514	124.1	2020	8,127	287.1
2025	3,440	122.0	2025	8,096	287.2
2030	3,328	119.3	2030	8,025	287.7
Percent change 2006-2030	-3.3%	-1.9%	Percent change 2006-2030	4.5%	6.1%
Annualized change 2006-2030	-0.14%	-0.08%	Annualized change 2006-2030	0.18%	0.25%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 359 – Long Island Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,544	125.2	2010	829	29.3
2015	3,550	125.4	2015	839	29.7
2020	3,514	124.1	2020	829	29.3
2025	3,440	122.0	2025	801	28.4
2030	3,328	119.3	2030	761	27.3
Percent change 2006-2030	-3.3%	-1.9%	Percent change 2006-2030	-6.1%	-4.6%
Annualized change 2006-2030	-0.14%	-0.08%	Annualized change 2006-2030	-0.26%	-0.20%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,785	63.0	2010	930	32.8
2015	1,785	63.0	2015	925	32.7
2020	1,756	62.0	2020	930	32.8
2025	1,702	60.4	2025	937	33.3
2030	1,631	58.5	2030	936	33.6
Percent change 2006-2030	-4.6%	-3.2%	Percent change 2006-2030	1.4%	2.9%
Annualized change 2006-2030	-0.20%	-0.13%	Annualized change 2006-2030	0.06%	0.12%

Non-Primary Care Specialties

Figure 360 – Long Island Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	468	16.5
2010	487	17.2
2015	515	18.2
2020	535	18.9
2025	547	19.4
2030	559	20.1
Percent change 2006-2030	19.5%	21.3%
Annualized change 2006-2030	0.75%	0.81%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	1,476	52.1
2010	1,572	55.5
2015	1,701	60.1
2020	1,801	63.6
2025	1,873	66.4
2030	1,930	69.2
Percent change 2006-2030	30.8%	32.7%
Annualized change 2006-2030	1.12%	1.19%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	564	19.9
2010	578	20.4
2015	588	20.8
2020	583	20.6
2025	568	20.2
2030	550	19.7
Percent change 2006-2030	-2.4%	-0.9%
Annualized change 2006-2030	-0.10%	-0.04%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	258	9.1
2010	245	8.6
2015	228	8.1
2020	212	7.5
2025	195	6.9
2030	179	6.4
Percent change 2006-2030	-30.7%	-29.7%
Annualized change 2006-2030	-1.52%	-1.46%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	655	23.1
2010	639	22.6
2015	615	21.7
2020	576	20.4
2025	536	19.0
2030	500	17.9
Percent change 2006-2030	-23.7%	-22.5%
Annualized change 2006-2030	-1.12%	-1.06%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	682	24.1
2010	702	24.8
2015	695	24.5
2020	706	24.9
2025	707	25.1
2030	696	25.0
Percent change 2006-2030	2.1%	3.6%
Annualized change 2006-2030	0.09%	0.15%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	587	20.7
2010	623	22.0
2015	643	22.7
2020	648	22.9
2025	648	23.0
2030	645	23.1
Percent change 2006-2030	9.8%	11.5%
Annualized change 2006-2030	0.39%	0.45%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	396	14.0
2010	432	15.2
2015	478	16.9
2020	518	18.3
2025	549	19.5
2030	570	20.4
Percent change 2006-2030	44.0%	46.2%
Annualized change 2006-2030	1.53%	1.60%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	371	13.1
2010	386	13.6
2015	398	14.1
2020	399	14.1
2025	400	14.2
2030	399	14.3
Percent change 2006-2030	7.4%	9.1%
Annualized change 2006-2030	0.30%	0.36%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	295	10.4
2010	285	10.1
2015	270	9.5
2020	253	8.9
2025	235	8.3
2030	219	7.9
Percent change 2006-2030	-25.6%	-24.5%
Annualized change 2006-2030	-1.23%	-1.16%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	113	4.0
2010	112	4.0
2015	111	3.9
2020	106	3.7
2025	103	3.6
2030	97	3.5
Percent change 2006-2030	-14.1%	-12.8%
Annualized change 2006-2030	-0.63%	-0.57%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	305	10.8
2010	314	11.1
2015	317	11.2
2020	317	11.2
2025	315	11.2
2030	313	11.2
Percent change 2006-2030	2.6%	4.1%
Annualized change 2006-2030	0.11%	0.17%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	165	5.8
2010	159	5.6
2015	149	5.3
2020	139	4.9
2025	130	4.6
2030	123	4.4
Percent change 2006-2030	-25.7%	-24.5%
Annualized change 2006-2030	-1.23%	-1.17%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	211	7.5
2010	208	7.3
2015	199	7.0
2020	190	6.7
2025	179	6.4
2030	168	6.0
Percent change 2006-2030	-20.4%	-19.3%
Annualized change 2006-2030	-0.95%	-0.89%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	1,133	40.0
2010	1,163	41.1
2015	1,165	41.2
2020	1,143	40.4
2025	1,111	39.4
2030	1,077	38.6
Percent change 2006-2030	-4.9%	-3.5%
Annualized change 2006-2030	-0.21%	-0.15%

Mohawk Valley Physician Supply, 2006 – 2030

Mohawk Valley Supply Scenario 1: Baseline (Supply Not Responsive to Demand)

Figure 361 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	901	179.4
2015	927	186.8
2020	939	192.0
2025	939	195.7
2030	933	199.0
Percent change 2006-2030	7.1%	15.9%
Annualized change 2006-2030	0.29%	0.62%

Figure 362 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	385	76.6	2010	517	102.8
2015	393	79.3	2015	533	107.5
2020	394	80.7	2020	544	111.3
2025	389	81.1	2025	550	114.6
2030	379	80.9	2030	554	118.1
Percent change 2006-2030	2.2%	10.5%	Percent change 2006-2030	10.8%	19.8%
Annualized change 2006-2030	0.09%	0.42%	Annualized change 2006-2030	0.43%	0.76%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 363 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	385	76.6	2010	204	40.5
2015	393	79.3	2015	208	42.0
2020	394	80.7	2020	208	42.5
2025	389	81.1	2025	203	42.4
2030	379	80.9	2030	196	41.7
Percent change 2006-2030	2.2%	10.5%	Percent change 2006-2030	-1.2%	6.9%
Annualized change 2006-2030	0.09%	0.42%	Annualized change 2006-2030	-0.05%	0.28%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	132	26.4	2010	49	9.7
2015	135	27.2	2015	50	10.1
2020	135	27.7	2020	51	10.5
2025	134	27.9	2025	52	10.8
2030	131	27.9	2030	52	11.2
Percent change 2006-2030	4.0%	12.5%	Percent change 2006-2030	11.6%	20.8%
Annualized change 2006-2030	0.16%	0.49%	Annualized change 2006-2030	0.46%	0.79%

Non-Primary Care Specialties

Figure 364 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	26	5.2
2015	28	5.7
2020	30	6.1
2025	31	6.5
2030	33	7.0
Percent change 2006-2030	31.0%	41.7%
Annualized change 2006-2030	1.13%	1.46%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	57	11.3
2015	63	12.7
2020	68	13.9
2025	72	15.0
2030	76	16.2
Percent change 2006-2030	43.6%	55.4%
Annualized change 2006-2030	1.52%	1.85%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.6
2015	39	7.9
2020	39	8.1
2025	39	8.2
2030	39	8.3
Percent change 2006-2030	5.1%	13.7%
Annualized change 2006-2030	0.21%	0.54%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	4.0
2015	19	3.8
2020	18	3.7
2025	17	3.5
2030	16	3.4
Percent change 2006-2030	-25.0%	-18.9%
Annualized change 2006-2030	-1.19%	-0.87%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	62	12.4
2015	61	12.3
2020	59	12.0
2025	56	11.6
2030	54	11.4
Percent change 2006-2030	-15.0%	-8.1%
Annualized change 2006-2030	-0.68%	-0.35%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.7
2015	49	9.9
2020	51	10.4
2025	52	10.8
2030	52	11.1
Percent change 2006-2030	10.6%	19.6%
Annualized change 2006-2030	0.42%	0.75%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	50	10.0
2015	53	10.6
2020	54	11.1
2025	55	11.5
2030	56	11.9
Percent change 2006-2030	19.0%	28.7%
Annualized change 2006-2030	0.73%	1.06%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	40	8.0
2020	44	9.0
2025	47	9.9
2030	50	10.7
Percent change 2006-2030	57.2%	70.1%
Annualized change 2006-2030	1.90%	2.24%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	33	6.5
2015	34	6.9
2020	35	7.1
2025	36	7.4
2030	36	7.8
Percent change 2006-2030	17.3%	26.8%
Annualized change 2006-2030	0.67%	1.00%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	19	3.7
2015	18	3.6
2020	17	3.5
2025	16	3.4
2030	15	3.3
Percent change 2006-2030	-18.9%	-12.3%
Annualized change 2006-2030	-0.87%	-0.55%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.6
2030	8	1.6
Percent change 2006-2030	-6.0%	1.6%
Annualized change 2006-2030	-0.26%	0.07%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.8
2015	35	7.0
2020	36	7.3
2025	36	7.5
2030	36	7.8
Percent change 2006-2030	10.4%	19.4%
Annualized change 2006-2030	0.41%	0.74%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	13	2.5
2015	12	2.4
2020	12	2.4
2025	11	2.3
2030	11	2.3
Percent change 2006-2030	-18.8%	-12.1%
Annualized change 2006-2030	-0.86%	-0.54%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.5
2025	7	1.5
2030	7	1.5
Percent change 2006-2030	-13.1%	-6.0%
Annualized change 2006-2030	-0.59%	-0.26%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	65	13.0
2015	66	13.4
2020	67	13.6
2025	66	13.7
2030	65	13.9
Percent change 2006-2030	3.8%	12.2%
Annualized change 2006-2030	0.15%	0.48%

Mohawk Valley Supply Scenario 1: Baseline (Supply Responsive to Demand)

Figure 365 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	882	175.5
2015	883	178.0
2020	876	179.2
2025	854	177.9
2030	829	176.7
Percent change 2006-2030	-4.9%	2.9%
Annualized change 2006-2030	-0.21%	0.12%

Figure 366 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	376	74.8	2010	506	100.7
2015	376	75.8	2015	507	102.2
2020	369	75.4	2020	507	103.8
2025	355	74.0	2025	499	103.9
2030	338	72.0	2030	491	104.7
Percent change 2006-2030	-9.0%	-1.5%	Percent change 2006-2030	-1.8%	6.2%
Annualized change 2006-2030	-0.39%	-0.06%	Annualized change 2006-2030	-0.08%	0.25%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 367 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	376	74.8	2010	199	39.7
2015	376	75.8	2015	199	40.2
2020	369	75.4	2020	195	40.0
2025	355	74.0	2025	188	39.1
2030	338	72.0	2030	176	37.6
Percent change 2006-2030	-9.0%	-1.5%	Percent change 2006-2030	-11.0%	-3.7%
Annualized change 2006-2030	-0.39%	-0.06%	Annualized change 2006-2030	-0.48%	-0.16%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	129	25.7	2010	48	9.5
2015	127	25.6	2015	49	10.0
2020	124	25.4	2020	49	10.0
2025	120	24.9	2025	48	10.0
2030	114	24.4	2030	47	10.1
Percent change 2006-2030	-9.2%	-1.8%	Percent change 2006-2030	0.4%	8.6%
Annualized change 2006-2030	-0.40%	-0.08%	Annualized change 2006-2030	0.02%	0.34%

Non-Primary Care Specialties

Figure 368 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	25	5.0
2015	27	5.4
2020	28	5.7
2025	29	6.0
2030	29	6.2
Percent change 2006-2030	15.4%	24.8%
Annualized change 2006-2030	0.60%	0.93%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	55	11.0
2015	59	12.0
2020	63	12.9
2025	65	13.6
2030	67	14.3
Percent change 2006-2030	26.3%	36.6%
Annualized change 2006-2030	0.98%	1.31%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.5
2015	38	7.6
2020	37	7.5
2025	36	7.4
2030	34	7.3
Percent change 2006-2030	-7.1%	0.5%
Annualized change 2006-2030	-0.31%	0.02%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	3.9
2015	18	3.6
2020	16	3.4
2025	15	3.1
2030	14	2.9
Percent change 2006-2030	-34.1%	-28.8%
Annualized change 2006-2030	-1.73%	-1.40%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	61	12.1
2015	58	11.6
2020	54	11.1
2025	50	10.4
2030	47	9.9
Percent change 2006-2030	-26.2%	-20.2%
Annualized change 2006-2030	-1.26%	-0.93%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	48	9.5
2015	47	9.5
2020	48	9.8
2025	48	10.0
2030	47	9.9
Percent change 2006-2030	-0.9%	7.2%
Annualized change 2006-2030	-0.04%	0.29%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.8
2015	50	10.1
2020	50	10.3
2025	50	10.4
2030	50	10.7
Percent change 2006-2030	6.8%	15.6%
Annualized change 2006-2030	0.28%	0.60%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	38	7.6
2020	41	8.4
2025	44	9.1
2030	46	9.8
Percent change 2006-2030	43.4%	55.2%
Annualized change 2006-2030	1.51%	1.85%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	32	6.3
2015	33	6.7
2020	33	6.7
2025	32	6.7
2030	32	6.8
Percent change 2006-2030	3.2%	11.6%
Annualized change 2006-2030	0.13%	0.46%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.6
2015	17	3.3
2020	16	3.3
2025	14	3.0
2030	14	3.0
Percent change 2006-2030	-27.1%	-21.2%
Annualized change 2006-2030	-1.31%	-0.99%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	7	1.5
2025	7	1.5
2030	7	1.4
Percent change 2006-2030	-15.4%	-8.5%
Annualized change 2006-2030	-0.70%	-0.37%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.7
2015	33	6.7
2020	34	6.9
2025	33	6.8
2030	32	6.9
Percent change 2006-2030	-2.3%	5.7%
Annualized change 2006-2030	-0.10%	0.23%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	12	2.5
2015	11	2.3
2020	11	2.2
2025	10	2.1
2030	9	2.0
Percent change 2006-2030	-28.5%	-22.7%
Annualized change 2006-2030	-1.39%	-1.07%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.5
2015	7	1.5
2020	7	1.4
2025	6	1.3
2030	6	1.3
Percent change 2006-2030	-26.6%	-20.6%
Annualized change 2006-2030	-1.28%	-0.96%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	64	12.7
2015	63	12.7
2020	62	12.7
2025	60	12.4
2030	58	12.3
Percent change 2006-2030	-8.6%	-1.1%
Annualized change 2006-2030	-0.37%	-0.05%

Mohawk Valley Supply Scenario 2a: NP/PA High Growth (Supply Not Responsive to Demand)

Figure 369 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	924	183.9
2015	975	196.6
2020	1,014	207.4
2025	1,041	216.9
2030	1,064	226.9
Percent change 2006-2030	22.2%	32.2%
Annualized change 2006-2030	0.84%	1.17%

Figure 370 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	398	79.3	2010	526	104.6
2015	421	84.8	2015	555	111.8
2020	436	89.3	2020	577	118.1
2025	446	93.0	2025	595	123.9
2030	454	96.7	2030	611	130.2
Percent change 2006-2030	22.3%	32.3%	Percent change 2006-2030	22.1%	32.1%
Annualized change 2006-2030	0.84%	1.17%	Annualized change 2006-2030	0.84%	1.17%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 371 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	398	79.3	2010	211	41.9
2015	421	84.8	2015	223	44.9
2020	436	89.3	2020	230	47.0
2025	446	93.0	2025	233	48.6
2030	454	96.7	2030	234	49.9
Percent change 2006-2030	22.3%	32.3%	Percent change 2006-2030	18.2%	27.9%
Annualized change 2006-2030	0.84%	1.17%	Annualized change 2006-2030	0.70%	1.03%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	137	27.3	2010	51	10.1
2015	144	29.1	2015	54	10.8
2020	150	30.6	2020	57	11.6
2025	154	32.0	2025	60	12.4
2030	157	33.4	2030	63	13.4
Percent change 2006-2030	24.4%	34.6%	Percent change 2006-2030	33.6%	44.5%
Annualized change 2006-2030	0.91%	1.24%	Annualized change 2006-2030	1.21%	1.54%

Non-Primary Care Specialties

Figure 372 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	27	5.3
2015	29	5.9
2020	32	6.5
2025	34	7.1
2030	36	7.7
Percent change 2006-2030	44.4%	56.2%
Annualized change 2006-2030	1.54%	1.88%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	58	11.5
2015	65	13.2
2020	72	14.8
2025	78	16.3
2030	84	17.9
Percent change 2006-2030	58.3%	71.3%
Annualized change 2006-2030	1.93%	2.27%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	39	7.7
2015	41	8.2
2020	42	8.6
2025	42	8.8
2030	43	9.1
Percent change 2006-2030	15.9%	25.3%
Annualized change 2006-2030	0.62%	0.94%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	4.1
2015	20	4.0
2020	19	3.9
2025	18	3.8
2030	17	3.7
Percent change 2006-2030	-17.4%	-10.6%
Annualized change 2006-2030	-0.79%	-0.47%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	63	12.6
2015	64	12.8
2020	62	12.7
2025	60	12.6
2030	59	12.6
Percent change 2006-2030	-6.3%	1.3%
Annualized change 2006-2030	-0.27%	0.05%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	50	9.9
2015	51	10.3
2020	54	11.0
2025	56	11.7
2030	57	12.2
Percent change 2006-2030	21.9%	31.8%
Annualized change 2006-2030	0.83%	1.16%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	51	10.2
2015	55	11.1
2020	58	11.8
2025	60	12.4
2030	62	13.1
Percent change 2006-2030	31.2%	41.9%
Annualized change 2006-2030	1.14%	1.47%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	36	7.1
2015	41	8.4
2020	47	9.5
2025	51	10.7
2030	55	11.8
Percent change 2006-2030	73.4%	87.5%
Annualized change 2006-2030	2.32%	2.65%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	33	6.6
2015	36	7.2
2020	37	7.6
2025	39	8.1
2030	40	8.5
Percent change 2006-2030	29.3%	39.8%
Annualized change 2006-2030	1.08%	1.41%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	19	3.7
2015	19	3.7
2020	18	3.7
2025	17	3.6
2030	17	3.6
Percent change 2006-2030	-10.6%	-3.3%
Annualized change 2006-2030	-0.47%	-0.14%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.7
2020	8	1.7
2025	8	1.8
2030	8	1.8
Percent change 2006-2030	3.6%	12.1%
Annualized change 2006-2030	0.15%	0.48%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	35	6.9
2015	36	7.3
2020	38	7.7
2025	39	8.1
2030	40	8.6
Percent change 2006-2030	21.7%	31.6%
Annualized change 2006-2030	0.82%	1.15%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	13	2.6
2015	13	2.5
2020	12	2.5
2025	12	2.5
2030	12	2.5
Percent change 2006-2030	-10.4%	-3.1%
Annualized change 2006-2030	-0.46%	-0.13%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.6
2030	8	1.6
Percent change 2006-2030	-4.2%	3.6%
Annualized change 2006-2030	-0.18%	0.15%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	66	13.2
2015	69	13.9
2020	71	14.4
2025	71	14.9
2030	72	15.4
Percent change 2006-2030	14.4%	23.7%
Annualized change 2006-2030	0.56%	0.89%

Mohawk Valley Supply Scenario 2a: NP/PA High Growth (Supply Responsive to Demand)

Figure 373 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	900	179.3
2015	924	186.2
2020	937	191.7
2025	934	194.6
2030	927	197.7
Percent change 2006-2030	6.5%	15.1%
Annualized change 2006-2030	0.26%	0.59%

Figure 374 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	387	77.0	2010	514	102.2
2015	400	80.6	2015	524	105.6
2020	404	82.6	2020	533	109.1
2025	401	83.6	2025	533	111.0
2030	394	84.1	2030	533	113.7
Percent change 2006-2030	6.3%	15.0%	Percent change 2006-2030	6.6%	15.3%
Annualized change 2006-2030	0.25%	0.58%	Annualized change 2006-2030	0.27%	0.59%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 375 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	387	77.0	2010	205	40.8
2015	400	80.6	2015	212	42.7
2020	404	82.6	2020	214	43.8
2025	401	83.6	2025	212	44.2
2030	394	84.1	2030	206	43.9
Percent change 2006-2030	6.3%	15.0%	Percent change 2006-2030	3.9%	12.4%
Annualized change 2006-2030	0.25%	0.58%	Annualized change 2006-2030	0.16%	0.49%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	133	26.4	2010	49	9.8
2015	135	27.3	2015	52	10.6
2020	136	27.9	2020	54	10.9
2025	135	28.2	2025	54	11.3
2030	133	28.5	2030	55	11.7
Percent change 2006-2030	5.9%	14.6%	Percent change 2006-2030	17.2%	26.8%
Annualized change 2006-2030	0.24%	0.57%	Annualized change 2006-2030	0.66%	0.99%

Non-Primary Care Specialties

Figure 376 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	26	5.1
2015	28	5.6
2020	30	6.0
2025	31	6.4
2030	31	6.7
Percent change 2006-2030	25.3%	35.6%
Annualized change 2006-2030	0.94%	1.28%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	56	11.2
2015	61	12.4
2020	66	13.5
2025	70	14.5
2030	73	15.5
Percent change 2006-2030	37.1%	48.3%
Annualized change 2006-2030	1.32%	1.66%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.6
2015	39	7.8
2020	39	7.9
2025	38	7.9
2030	37	8.0
Percent change 2006-2030	0.9%	9.1%
Annualized change 2006-2030	0.04%	0.37%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	4.0
2015	19	3.7
2020	17	3.5
2025	16	3.4
2030	15	3.2
Percent change 2006-2030	-28.5%	-22.7%
Annualized change 2006-2030	-1.39%	-1.06%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	62	12.3
2015	60	12.0
2020	57	11.7
2025	53	11.1
2030	50	10.8
Percent change 2006-2030	-19.8%	-13.3%
Annualized change 2006-2030	-0.92%	-0.59%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	48	9.6
2015	49	9.9
2020	50	10.3
2025	51	10.6
2030	51	10.8
Percent change 2006-2030	7.6%	16.4%
Annualized change 2006-2030	0.31%	0.64%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	50	10.0
2015	52	10.4
2020	53	10.8
2025	54	11.1
2030	55	11.6
Percent change 2006-2030	16.0%	25.5%
Annualized change 2006-2030	0.62%	0.95%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.1
2015	39	7.9
2020	43	8.8
2025	47	9.7
2030	50	10.6
Percent change 2006-2030	55.8%	68.5%
Annualized change 2006-2030	1.86%	2.20%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	32	6.4
2015	34	6.9
2020	34	7.0
2025	34	7.2
2030	35	7.4
Percent change 2006-2030	12.0%	21.2%
Annualized change 2006-2030	0.47%	0.80%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.6
2015	17	3.5
2020	17	3.4
2025	15	3.2
2030	15	3.2
Percent change 2006-2030	-20.9%	-14.4%
Annualized change 2006-2030	-0.97%	-0.65%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.6
2030	7	1.6
Percent change 2006-2030	-8.2%	-0.7%
Annualized change 2006-2030	-0.35%	-0.03%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.8
2015	34	6.9
2020	35	7.2
2025	35	7.3
2030	35	7.5
Percent change 2006-2030	6.1%	14.8%
Annualized change 2006-2030	0.25%	0.58%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	13	2.5
2015	12	2.3
2020	12	2.4
2025	11	2.2
2030	10	2.2
Percent change 2006-2030	-22.4%	-16.1%
Annualized change 2006-2030	-1.05%	-0.73%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	7	1.5
2020	7	1.5
2025	7	1.4
2030	6	1.4
Percent change 2006-2030	-20.3%	-13.8%
Annualized change 2006-2030	-0.94%	-0.62%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	65	12.9
2015	65	13.1
2020	65	13.3
2025	64	13.2
2030	63	13.3
Percent change 2006-2030	-0.7%	7.4%
Annualized change 2006-2030	-0.03%	0.30%

Mohawk Valley Supply Scenario 2b: NP/PA Lower Growth (Supply Not Responsive to Demand)

Figure 377 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	918	182.8
2015	957	192.8
2020	981	200.8
2025	996	207.4
2030	1,005	214.4
Percent change 2006-2030	15.4%	24.8%
Annualized change 2006-2030	0.60%	0.93%

Figure 378 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	395	78.7	2010	523	104.2
2015	410	82.6	2015	547	110.2
2020	418	85.5	2020	564	115.3
2025	420	87.6	2025	575	119.8
2030	420	89.6	2030	585	124.8
Percent change 2006-2030	13.2%	22.5%	Percent change 2006-2030	17.0%	26.6%
Annualized change 2006-2030	0.52%	0.85%	Annualized change 2006-2030	0.66%	0.99%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 379 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	395	78.7	2010	209	41.6
2015	410	82.6	2015	217	43.7
2020	418	85.5	2020	220	45.1
2025	420	87.6	2025	220	45.8
2030	420	89.6	2030	217	46.2
Percent change 2006-2030	13.2%	22.5%	Percent change 2006-2030	9.5%	18.4%
Annualized change 2006-2030	0.52%	0.85%	Annualized change 2006-2030	0.38%	0.71%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	136	27.1	2010	50	10.0
2015	141	28.3	2015	52	10.6
2020	143	29.3	2020	54	11.1
2025	145	30.1	2025	56	11.7
2030	145	31.0	2030	58	12.4
Percent change 2006-2030	15.2%	24.6%	Percent change 2006-2030	23.7%	33.8%
Annualized change 2006-2030	0.59%	0.92%	Annualized change 2006-2030	0.89%	1.22%

Non-Primary Care Specialties

Figure 380 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	27	5.3
2015	29	5.8
2020	31	6.4
2025	33	6.8
2030	35	7.4
Percent change 2006-2030	38.4%	49.7%
Annualized change 2006-2030	1.36%	1.70%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	58	11.5
2015	64	13.0
2020	70	14.4
2025	76	15.7
2030	80	17.2
Percent change 2006-2030	51.8%	64.2%
Annualized change 2006-2030	1.75%	2.09%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	39	7.7
2015	40	8.1
2020	41	8.3
2025	41	8.6
2030	41	8.8
Percent change 2006-2030	11.1%	20.1%
Annualized change 2006-2030	0.44%	0.77%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	4.0
2015	19	3.9
2020	19	3.8
2025	18	3.7
2030	17	3.5
Percent change 2006-2030	-20.8%	-14.3%
Annualized change 2006-2030	-0.97%	-0.64%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	63	12.5
2015	63	12.6
2020	61	12.4
2025	58	12.2
2030	57	12.1
Percent change 2006-2030	-10.2%	-2.9%
Annualized change 2006-2030	-0.45%	-0.12%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.8
2015	50	10.1
2020	53	10.8
2025	54	11.3
2030	55	11.7
Percent change 2006-2030	16.8%	26.4%
Annualized change 2006-2030	0.65%	0.98%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	51	10.1
2015	54	10.9
2020	56	11.5
2025	58	12.0
2030	59	12.6
Percent change 2006-2030	25.7%	36.0%
Annualized change 2006-2030	0.96%	1.29%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	36	7.1
2015	41	8.2
2020	45	9.3
2025	50	10.3
2030	53	11.3
Percent change 2006-2030	66.2%	79.7%
Annualized change 2006-2030	2.14%	2.47%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	33	6.6
2015	35	7.1
2020	36	7.4
2025	37	7.8
2030	38	8.2
Percent change 2006-2030	23.9%	34.0%
Annualized change 2006-2030	0.90%	1.23%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	19	3.7
2015	18	3.7
2020	18	3.6
2025	17	3.5
2030	16	3.5
Percent change 2006-2030	-14.3%	-7.3%
Annualized change 2006-2030	-0.64%	-0.32%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.7
2020	8	1.7
2025	8	1.7
2030	8	1.7
Percent change 2006-2030	-0.7%	7.4%
Annualized change 2006-2030	-0.03%	0.30%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	35	6.9
2015	36	7.2
2020	37	7.5
2025	38	7.8
2030	38	8.2
Percent change 2006-2030	16.7%	26.2%
Annualized change 2006-2030	0.64%	0.97%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	13	2.6
2015	12	2.5
2020	12	2.4
2025	12	2.4
2030	11	2.4
Percent change 2006-2030	-14.2%	-7.1%
Annualized change 2006-2030	-0.63%	-0.31%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.6
2030	7	1.6
Percent change 2006-2030	-8.2%	-0.7%
Annualized change 2006-2030	-0.36%	-0.03%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	66	13.1
2015	68	13.7
2020	69	14.1
2025	69	14.4
2030	69	14.7
Percent change 2006-2030	9.6%	18.6%
Annualized change 2006-2030	0.38%	0.71%

Mohawk Valley Supply Scenario 2b: NP/PA Lower Growth (Supply Responsive to Demand)

Figure 381 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	895	178.2
2015	906	182.6
2020	907	185.6
2025	893	186.1
2030	876	186.8
Percent change 2006-2030	0.6%	8.8%
Annualized change 2006-2030	0.02%	0.35%

Figure 382 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	384	76.4	2010	511	101.8
2015	390	78.5	2015	516	104.1
2020	387	79.2	2020	520	106.5
2025	378	78.8	2025	515	107.3
2030	365	77.9	2030	511	108.9
Percent change 2006-2030	-1.6%	6.4%	Percent change 2006-2030	2.2%	10.5%
Annualized change 2006-2030	-0.07%	0.26%	Annualized change 2006-2030	0.09%	0.42%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 383 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	384	76.4	2010	204	40.5
2015	390	78.5	2015	207	41.6
2020	387	79.2	2020	205	42.0
2025	378	78.8	2025	200	41.6
2030	365	77.9	2030	190	40.6
Percent change 2006-2030	-1.6%	6.4%	Percent change 2006-2030	-3.8%	4.1%
Annualized change 2006-2030	-0.07%	0.26%	Annualized change 2006-2030	-0.16%	0.17%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	132	26.2	2010	49	9.7
2015	132	26.6	2015	51	10.3
2020	131	26.7	2020	51	10.5
2025	127	26.5	2025	51	10.6
2030	124	26.4	2030	51	10.9
Percent change 2006-2030	-1.9%	6.1%	Percent change 2006-2030	8.5%	17.4%
Annualized change 2006-2030	-0.08%	0.25%	Annualized change 2006-2030	0.34%	0.67%

Non-Primary Care Specialties

Figure 384 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	26	5.1
2015	27	5.5
2020	29	5.9
2025	30	6.2
2030	30	6.4
Percent change 2006-2030	20.1%	29.9%
Annualized change 2006-2030	0.77%	1.10%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	56	11.1
2015	61	12.2
2020	64	13.2
2025	67	14.0
2030	70	14.9
Percent change 2006-2030	31.4%	42.2%
Annualized change 2006-2030	1.15%	1.48%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.6
2015	38	7.7
2020	38	7.7
2025	37	7.7
2030	36	7.6
Percent change 2006-2030	-3.3%	4.6%
Annualized change 2006-2030	-0.14%	0.19%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	3.9
2015	18	3.7
2020	17	3.5
2025	16	3.2
2030	14	3.1
Percent change 2006-2030	-31.5%	-25.9%
Annualized change 2006-2030	-1.56%	-1.24%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	62	12.3
2015	59	11.9
2020	56	11.4
2025	52	10.8
2030	48	10.3
Percent change 2006-2030	-23.2%	-16.9%
Annualized change 2006-2030	-1.09%	-0.77%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	48	9.6
2015	48	9.7
2020	49	10.1
2025	49	10.3
2030	48	10.3
Percent change 2006-2030	3.2%	11.6%
Annualized change 2006-2030	0.13%	0.46%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	50	9.9
2015	51	10.3
2020	52	10.6
2025	52	10.8
2030	52	11.1
Percent change 2006-2030	11.2%	20.3%
Annualized change 2006-2030	0.44%	0.77%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	38	7.8
2020	42	8.6
2025	45	9.4
2030	48	10.2
Percent change 2006-2030	49.3%	61.5%
Annualized change 2006-2030	1.68%	2.02%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	32	6.4
2015	34	6.8
2020	33	6.8
2025	33	6.9
2030	33	7.1
Percent change 2006-2030	7.4%	16.1%
Annualized change 2006-2030	0.30%	0.63%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.6
2015	17	3.4
2020	16	3.3
2025	15	3.1
2030	14	3.1
Percent change 2006-2030	-24.1%	-17.9%
Annualized change 2006-2030	-1.14%	-0.82%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	7	1.5
2030	7	1.5
Percent change 2006-2030	-12.0%	-4.8%
Annualized change 2006-2030	-0.53%	-0.20%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.7
2015	34	6.8
2020	34	7.1
2025	34	7.0
2030	34	7.2
Percent change 2006-2030	1.7%	10.0%
Annualized change 2006-2030	0.07%	0.40%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	12	2.5
2015	11	2.3
2020	11	2.3
2025	10	2.2
2030	10	2.1
Percent change 2006-2030	-25.6%	-19.5%
Annualized change 2006-2030	-1.23%	-0.90%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.5
2015	7	1.5
2020	7	1.4
2025	6	1.4
2030	6	1.3
Percent change 2006-2030	-23.6%	-17.3%
Annualized change 2006-2030	-1.11%	-0.79%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	64	12.8
2015	64	12.9
2020	64	13.0
2025	61	12.8
2030	60	12.8
Percent change 2006-2030	-4.8%	2.9%
Annualized change 2006-2030	-0.21%	0.12%

Mohawk Valley Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 385 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	902	179.7
2015	934	188.2
2020	951	194.6
2025	958	199.5
2030	956	203.9
Percent change 2006-2030	9.8%	18.7%
Annualized change 2006-2030	0.39%	0.72%

Figure 386 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	385	76.7	2010	517	103.0
2015	396	79.7	2015	538	108.4
2020	399	81.6	2020	553	113.0
2025	395	82.4	2025	562	117.2
2030	387	82.5	2030	569	121.4
Percent change 2006-2030	4.3%	12.8%	Percent change 2006-2030	13.8%	23.1%
Annualized change 2006-2030	0.17%	0.50%	Annualized change 2006-2030	0.54%	0.87%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 387– Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	385	76.7	2010	204	40.6
2015	396	79.7	2015	209	42.2
2020	399	81.6	2020	210	43.0
2025	395	82.4	2025	207	43.0
2030	387	82.5	2030	200	42.6
Percent change 2006-2030	4.3%	12.8%	Percent change 2006-2030	0.8%	9.1%
Annualized change 2006-2030	0.17%	0.50%	Annualized change 2006-2030	0.03%	0.36%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	133	26.4	2010	49	9.7
2015	136	27.4	2015	51	10.2
2020	137	28.0	2020	52	10.6
2025	136	28.3	2025	53	11.0
2030	134	28.5	2030	54	11.4
Percent change 2006-2030	6.1%	14.8%	Percent change 2006-2030	13.9%	23.2%
Annualized change 2006-2030	0.25%	0.58%	Annualized change 2006-2030	0.54%	0.87%

Non-Primary Care Specialties

Figure 388 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	26	5.2
2015	29	5.8
2020	31	6.2
2025	32	6.7
2030	34	7.2
Percent change 2006-2030	34.6%	45.6%
Annualized change 2006-2030	1.25%	1.58%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	57	11.3
2015	63	12.8
2020	69	14.1
2025	74	15.4
2030	78	16.7
Percent change 2006-2030	47.6%	59.7%
Annualized change 2006-2030	1.64%	1.97%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.6
2015	39	7.9
2020	40	8.2
2025	40	8.4
2030	40	8.5
Percent change 2006-2030	8.0%	16.8%
Annualized change 2006-2030	0.32%	0.65%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	4.0
2015	19	3.9
2020	18	3.7
2025	17	3.6
2030	16	3.5
Percent change 2006-2030	-23.0%	-16.7%
Annualized change 2006-2030	-1.08%	-0.76%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	62	12.4
2015	62	12.4
2020	60	12.2
2025	57	11.9
2030	55	11.7
Percent change 2006-2030	-12.7%	-5.6%
Annualized change 2006-2030	-0.56%	-0.24%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.7
2015	49	10.0
2020	52	10.6
2025	53	11.0
2030	53	11.4
Percent change 2006-2030	13.6%	22.9%
Annualized change 2006-2030	0.53%	0.86%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	50	10.0
2015	53	10.7
2020	55	11.3
2025	56	11.8
2030	57	12.3
Percent change 2006-2030	22.3%	32.2%
Annualized change 2006-2030	0.84%	1.17%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	40	8.1
2020	45	9.1
2025	49	10.1
2030	52	11.0
Percent change 2006-2030	61.6%	74.8%
Annualized change 2006-2030	2.02%	2.35%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	33	6.5
2015	34	6.9
2020	35	7.3
2025	37	7.6
2030	37	8.0
Percent change 2006-2030	20.5%	30.4%
Annualized change 2006-2030	0.78%	1.11%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	19	3.7
2015	18	3.6
2020	17	3.5
2025	17	3.4
2030	16	3.4
Percent change 2006-2030	-16.7%	-9.9%
Annualized change 2006-2030	-0.76%	-0.43%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.7
2030	8	1.6
Percent change 2006-2030	-3.4%	4.5%
Annualized change 2006-2030	-0.14%	0.18%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.8
2015	35	7.1
2020	36	7.4
2025	37	7.7
2030	37	8.0
Percent change 2006-2030	13.5%	22.7%
Annualized change 2006-2030	0.53%	0.86%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	13	2.5
2015	12	2.5
2020	12	2.4
2025	11	2.4
2030	11	2.3
Percent change 2006-2030	-16.5%	-9.7%
Annualized change 2006-2030	-0.75%	-0.42%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	7	1.5
2030	7	1.5
Percent change 2006-2030	-10.7%	-3.4%
Annualized change 2006-2030	-0.47%	-0.15%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	65	13.0
2015	67	13.5
2020	68	13.8
2025	67	14.1
2030	67	14.3
Percent change 2006-2030	6.6%	15.3%
Annualized change 2006-2030	0.27%	0.60%

Mohawk Valley Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 389 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	883	175.7
2015	889	179.2
2020	887	181.5
2025	870	181.3
2030	849	181.0
Percent change 2006-2030	-2.6%	5.4%
Annualized change 2006-2030	-0.11%	0.22%

Figure 390 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	376	74.9	2010	506	100.8
2015	378	76.2	2015	511	103.0
2020	372	76.2	2020	515	105.3
2025	361	75.1	2025	509	106.1
2030	344	73.5	2030	504	107.5
Percent change 2006-2030	-7.2%	0.4%	Percent change 2006-2030	0.8%	9.1%
Annualized change 2006-2030	-0.31%	0.02%	Annualized change 2006-2030	0.03%	0.36%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 391– Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	376	74.9	2010	200	39.7
2015	378	76.2	2015	201	40.4
2020	372	76.2	2020	197	40.4
2025	361	75.1	2025	191	39.7
2030	344	73.5	2030	180	38.3
Percent change 2006-2030	-7.2%	0.4%	Percent change 2006-2030	-9.2%	-1.8%
Annualized change 2006-2030	-0.31%	0.02%	Annualized change 2006-2030	-0.40%	-0.08%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	129	25.7	2010	48	9.5
2015	128	25.8	2015	50	10.0
2020	126	25.7	2020	49	10.1
2025	121	25.3	2025	49	10.1
2030	117	24.9	2030	48	10.3
Percent change 2006-2030	-7.5%	0.1%	Percent change 2006-2030	2.4%	10.7%
Annualized change 2006-2030	-0.32%	0.00%	Annualized change 2006-2030	0.10%	0.43%

Non-Primary Care Specialties

Figure 392 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	25	5.1
2015	27	5.5
2020	28	5.8
2025	29	6.1
2030	30	6.3
Percent change 2006-2030	18.6%	28.2%
Annualized change 2006-2030	0.71%	1.04%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	55	11.0
2015	60	12.1
2020	64	13.0
2025	67	13.9
2030	69	14.7
Percent change 2006-2030	29.7%	40.3%
Annualized change 2006-2030	1.09%	1.42%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.5
2015	38	7.6
2020	37	7.7
2025	36	7.6
2030	35	7.5
Percent change 2006-2030	-4.5%	3.2%
Annualized change 2006-2030	-0.19%	0.13%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	3.9
2015	18	3.6
2020	17	3.4
2025	15	3.2
2030	14	3.0
Percent change 2006-2030	-32.4%	-26.8%
Annualized change 2006-2030	-1.62%	-1.29%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	61	12.2
2015	58	11.7
2020	55	11.3
2025	51	10.7
2030	48	10.2
Percent change 2006-2030	-24.2%	-18.0%
Annualized change 2006-2030	-1.15%	-0.82%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	48	9.5
2015	48	9.6
2020	49	10.0
2025	49	10.2
2030	48	10.2
Percent change 2006-2030	1.8%	10.1%
Annualized change 2006-2030	0.08%	0.40%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.8
2015	50	10.2
2020	51	10.5
2025	51	10.7
2030	52	11.0
Percent change 2006-2030	9.7%	18.7%
Annualized change 2006-2030	0.39%	0.72%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	38	7.7
2020	42	8.5
2025	45	9.3
2030	47	10.1
Percent change 2006-2030	47.3%	59.4%
Annualized change 2006-2030	1.63%	1.96%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	32	6.3
2015	33	6.7
2020	33	6.8
2025	33	6.9
2030	33	7.0
Percent change 2006-2030	6.0%	14.6%
Annualized change 2006-2030	0.24%	0.57%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.6
2015	17	3.4
2020	16	3.3
2025	15	3.0
2030	14	3.0
Percent change 2006-2030	-25.1%	-19.0%
Annualized change 2006-2030	-1.20%	-0.88%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.5
2025	7	1.5
2030	7	1.5
Percent change 2006-2030	-13.1%	-6.0%
Annualized change 2006-2030	-0.58%	-0.26%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.7
2015	33	6.7
2020	34	7.0
2025	33	7.0
2030	33	7.1
Percent change 2006-2030	0.4%	8.6%
Annualized change 2006-2030	0.02%	0.34%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	12	2.5
2015	11	2.3
2020	11	2.3
2025	10	2.1
2030	10	2.0
Percent change 2006-2030	-26.6%	-20.6%
Annualized change 2006-2030	-1.28%	-0.96%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.5
2015	7	1.5
2020	7	1.4
2025	6	1.3
2030	6	1.3
Percent change 2006-2030	-24.6%	-18.4%
Annualized change 2006-2030	-1.17%	-0.84%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	64	12.7
2015	63	12.8
2020	63	12.9
2025	61	12.7
2030	59	12.6
Percent change 2006-2030	-6.1%	1.6%
Annualized change 2006-2030	-0.26%	0.07%

Mohawk Valley Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 393 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	902	179.7
2015	934	188.2
2020	951	194.6
2025	958	199.5
2030	956	203.9
Percent change 2006-2030	9.8%	18.7%
Annualized change 2006-2030	0.39%	0.72%

Figure 394 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	385	76.7	2010	517	103.0
2015	395	79.6	2015	538	108.5
2020	398	81.3	2020	554	113.3
2025	394	82.0	2025	564	117.5
2030	385	82.1	2030	571	121.8
Percent change 2006-2030	3.8%	12.2%	Percent change 2006-2030	14.2%	23.5%
Annualized change 2006-2030	0.15%	0.48%	Annualized change 2006-2030	0.56%	0.88%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 395– Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	385	76.7	2010	204	40.5
2015	395	79.6	2015	209	42.1
2020	398	81.3	2020	210	42.9
2025	394	82.0	2025	206	42.9
2030	385	82.1	2030	199	42.4
Percent change 2006-2030	3.8%	12.2%	Percent change 2006-2030	0.3%	8.5%
Annualized change 2006-2030	0.15%	0.48%	Annualized change 2006-2030	0.01%	0.34%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	133	26.4	2010	49	9.7
2015	136	27.3	2015	51	10.2
2020	136	27.9	2020	52	10.6
2025	135	28.2	2025	53	11.0
2030	133	28.4	2030	53	11.4
Percent change 2006-2030	5.6%	14.2%	Percent change 2006-2030	13.3%	22.6%
Annualized change 2006-2030	0.23%	0.55%	Annualized change 2006-2030	0.52%	0.85%

Non-Primary Care Specialties

Figure 396 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	26	5.2
2015	29	5.8
2020	31	6.3
2025	32	6.7
2030	34	7.2
Percent change 2006-2030	35.1%	46.1%
Annualized change 2006-2030	1.26%	1.59%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	57	11.3
2015	63	12.8
2020	69	14.2
2025	74	15.4
2030	79	16.7
Percent change 2006-2030	48.1%	60.2%
Annualized change 2006-2030	1.65%	1.98%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.6
2015	39	7.9
2020	40	8.2
2025	40	8.4
2030	40	8.6
Percent change 2006-2030	8.4%	17.2%
Annualized change 2006-2030	0.34%	0.66%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	4.0
2015	19	3.9
2020	18	3.7
2025	17	3.6
2030	16	3.5
Percent change 2006-2030	-22.7%	-16.4%
Annualized change 2006-2030	-1.07%	-0.74%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	62	12.4
2015	62	12.4
2020	60	12.2
2025	57	11.9
2030	55	11.8
Percent change 2006-2030	-12.4%	-5.2%
Annualized change 2006-2030	-0.55%	-0.22%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.7
2015	50	10.0
2020	52	10.6
2025	53	11.1
2030	54	11.4
Percent change 2006-2030	14.0%	23.3%
Annualized change 2006-2030	0.55%	0.88%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	50	10.0
2015	53	10.7
2020	55	11.3
2025	57	11.8
2030	58	12.3
Percent change 2006-2030	22.7%	32.7%
Annualized change 2006-2030	0.86%	1.19%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	40	8.1
2020	45	9.1
2025	49	10.1
2030	52	11.1
Percent change 2006-2030	62.2%	75.4%
Annualized change 2006-2030	2.03%	2.37%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	33	6.5
2015	34	6.9
2020	36	7.3
2025	37	7.6
2030	37	8.0
Percent change 2006-2030	20.9%	30.8%
Annualized change 2006-2030	0.79%	1.13%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	19	3.7
2015	18	3.6
2020	17	3.6
2025	17	3.5
2030	16	3.4
Percent change 2006-2030	-16.4%	-9.6%
Annualized change 2006-2030	-0.74%	-0.42%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.7
2030	8	1.7
Percent change 2006-2030	-3.1%	4.8%
Annualized change 2006-2030	-0.13%	0.20%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.8
2015	35	7.1
2020	36	7.4
2025	37	7.7
2030	38	8.0
Percent change 2006-2030	13.8%	23.1%
Annualized change 2006-2030	0.54%	0.87%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	13	2.5
2015	12	2.5
2020	12	2.4
2025	11	2.4
2030	11	2.3
Percent change 2006-2030	-16.2%	-9.4%
Annualized change 2006-2030	-0.73%	-0.41%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	7	1.6
2030	7	1.5
Percent change 2006-2030	-10.4%	-3.1%
Annualized change 2006-2030	-0.46%	-0.13%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	65	13.0
2015	67	13.5
2020	68	13.8
2025	68	14.1
2030	67	14.4
Percent change 2006-2030	7.0%	15.7%
Annualized change 2006-2030	0.28%	0.61%

Mohawk Valley Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 397 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	883	175.7
2015	889	179.2
2020	887	181.5
2025	870	181.3
2030	849	181.0
Percent change 2006-2030	-2.6%	5.4%
Annualized change 2006-2030	-0.11%	0.22%

Figure 398 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	376	74.9	2010	506	100.8
2015	378	76.1	2015	511	103.1
2020	371	76.0	2020	516	105.5
2025	359	74.9	2025	511	106.4
2030	343	73.1	2030	506	107.9
Percent change 2006-2030	-7.6%	-0.1%	Percent change 2006-2030	1.2%	9.4%
Annualized change 2006-2030	-0.33%	0.00%	Annualized change 2006-2030	0.05%	0.38%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 399– Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	376	74.9	2010	199	39.7
2015	378	76.1	2015	200	40.4
2020	371	76.0	2020	197	40.3
2025	359	74.9	2025	190	39.6
2030	343	73.1	2030	179	38.1
Percent change 2006-2030	-7.6%	-0.1%	Percent change 2006-2030	-9.7%	-2.3%
Annualized change 2006-2030	-0.33%	0.00%	Annualized change 2006-2030	-0.42%	-0.10%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	129	25.7	2010	48	9.5
2015	128	25.8	2015	50	10.0
2020	125	25.6	2020	49	10.1
2025	121	25.2	2025	48	10.1
2030	116	24.7	2030	48	10.2
Percent change 2006-2030	-7.9%	-0.4%	Percent change 2006-2030	1.9%	10.2%
Annualized change 2006-2030	-0.34%	-0.02%	Annualized change 2006-2030	0.08%	0.41%

Non-Primary Care Specialties

Figure 400 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	25	5.1
2015	27	5.5
2020	29	5.8
2025	29	6.1
2030	30	6.3
Percent change 2006-2030	18.9%	28.7%
Annualized change 2006-2030	0.73%	1.06%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	55	11.0
2015	60	12.1
2020	64	13.1
2025	67	13.9
2030	69	14.7
Percent change 2006-2030	30.2%	40.8%
Annualized change 2006-2030	1.10%	1.44%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.5
2015	38	7.7
2020	37	7.7
2025	37	7.6
2030	35	7.6
Percent change 2006-2030	-4.2%	3.6%
Annualized change 2006-2030	-0.18%	0.15%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	3.9
2015	18	3.7
2020	17	3.4
2025	15	3.2
2030	14	3.0
Percent change 2006-2030	-32.1%	-26.6%
Annualized change 2006-2030	-1.60%	-1.28%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	61	12.2
2015	58	11.7
2020	55	11.3
2025	51	10.7
2030	48	10.2
Percent change 2006-2030	-23.9%	-17.7%
Annualized change 2006-2030	-1.13%	-0.81%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	48	9.5
2015	48	9.6
2020	49	10.0
2025	49	10.2
2030	48	10.2
Percent change 2006-2030	2.2%	10.5%
Annualized change 2006-2030	0.09%	0.42%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.8
2015	50	10.2
2020	51	10.5
2025	51	10.7
2030	52	11.0
Percent change 2006-2030	10.1%	19.1%
Annualized change 2006-2030	0.40%	0.73%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	38	7.7
2020	42	8.5
2025	45	9.3
2030	47	10.1
Percent change 2006-2030	47.8%	59.9%
Annualized change 2006-2030	1.64%	1.97%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	32	6.3
2015	33	6.7
2020	33	6.8
2025	33	6.9
2030	33	7.0
Percent change 2006-2030	6.3%	15.0%
Annualized change 2006-2030	0.26%	0.58%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.6
2015	17	3.4
2020	16	3.3
2025	15	3.1
2030	14	3.0
Percent change 2006-2030	-24.9%	-18.8%
Annualized change 2006-2030	-1.19%	-0.86%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.5
2025	7	1.5
2030	7	1.5
Percent change 2006-2030	-12.8%	-5.7%
Annualized change 2006-2030	-0.57%	-0.25%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.7
2015	34	6.8
2020	34	7.0
2025	34	7.0
2030	33	7.1
Percent change 2006-2030	0.7%	8.9%
Annualized change 2006-2030	0.03%	0.36%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	12	2.5
2015	11	2.3
2020	11	2.3
2025	10	2.1
2030	10	2.0
Percent change 2006-2030	-26.3%	-20.3%
Annualized change 2006-2030	-1.27%	-0.94%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.5
2015	7	1.5
2020	7	1.4
2025	6	1.3
2030	6	1.3
Percent change 2006-2030	-24.3%	-18.2%
Annualized change 2006-2030	-1.15%	-0.83%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	64	12.7
2015	64	12.8
2020	63	12.9
2025	61	12.7
2030	59	12.7
Percent change 2006-2030	-5.8%	1.9%
Annualized change 2006-2030	-0.25%	0.08%

Mohawk Valley Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 401 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	902	179.7
2015	934	188.2
2020	951	194.6
2025	958	199.5
2030	956	203.9
Percent change 2006-2030	9.8%	18.7%
Annualized change 2006-2030	0.39%	0.72%

Figure 402 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	385	76.6	2010	517	103.0
2015	395	79.6	2015	539	108.6
2020	397	81.2	2020	554	113.4
2025	393	81.8	2025	565	117.7
2030	384	81.8	2030	572	122.0
Percent change 2006-2030	3.4%	11.9%	Percent change 2006-2030	14.4%	23.8%
Annualized change 2006-2030	0.14%	0.47%	Annualized change 2006-2030	0.56%	0.89%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 403 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	385	76.6	2010	204	40.5
2015	395	79.6	2015	209	42.1
2020	397	81.2	2020	209	42.8
2025	393	81.8	2025	205	42.8
2030	384	81.8	2030	198	42.2
Percent change 2006-2030	3.4%	11.9%	Percent change 2006-2030	0.0%	8.2%
Annualized change 2006-2030	0.14%	0.47%	Annualized change 2006-2030	0.00%	0.33%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	132	26.4	2010	49	9.7
2015	135	27.3	2015	50	10.2
2020	136	27.9	2020	52	10.6
2025	135	28.1	2025	52	10.9
2030	133	28.3	2030	53	11.3
Percent change 2006-2030	5.3%	13.9%	Percent change 2006-2030	13.0%	22.2%
Annualized change 2006-2030	0.21%	0.54%	Annualized change 2006-2030	0.51%	0.84%

Non-Primary Care Specialties

Figure 404 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	26	5.2
2015	29	5.8
2020	31	6.3
2025	32	6.7
2030	34	7.2
Percent change 2006-2030	35.4%	46.4%
Annualized change 2006-2030	1.27%	1.60%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	57	11.3
2015	63	12.8
2020	69	14.2
2025	74	15.5
2030	79	16.8
Percent change 2006-2030	48.4%	60.5%
Annualized change 2006-2030	1.66%	1.99%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.6
2015	39	8.0
2020	40	8.2
2025	40	8.4
2030	40	8.6
Percent change 2006-2030	8.6%	17.5%
Annualized change 2006-2030	0.34%	0.67%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	4.0
2015	19	3.9
2020	18	3.7
2025	17	3.6
2030	16	3.5
Percent change 2006-2030	-22.5%	-16.2%
Annualized change 2006-2030	-1.06%	-0.73%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	62	12.4
2015	62	12.5
2020	60	12.2
2025	57	12.0
2030	55	11.8
Percent change 2006-2030	-12.2%	-5.0%
Annualized change 2006-2030	-0.54%	-0.22%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.7
2015	50	10.0
2020	52	10.6
2025	53	11.1
2030	54	11.5
Percent change 2006-2030	14.2%	23.6%
Annualized change 2006-2030	0.56%	0.89%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	50	10.0
2015	53	10.7
2020	55	11.3
2025	57	11.8
2030	58	12.3
Percent change 2006-2030	22.9%	33.0%
Annualized change 2006-2030	0.86%	1.19%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	40	8.1
2020	45	9.2
2025	49	10.2
2030	52	11.1
Percent change 2006-2030	62.5%	75.8%
Annualized change 2006-2030	2.04%	2.38%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	33	6.5
2015	34	7.0
2020	36	7.3
2025	37	7.6
2030	38	8.0
Percent change 2006-2030	21.2%	31.1%
Annualized change 2006-2030	0.80%	1.13%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	19	3.7
2015	18	3.6
2020	17	3.6
2025	17	3.5
2030	16	3.4
Percent change 2006-2030	-16.2%	-9.4%
Annualized change 2006-2030	-0.73%	-0.41%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.7
2030	8	1.7
Percent change 2006-2030	-2.9%	5.0%
Annualized change 2006-2030	-0.12%	0.20%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.8
2015	35	7.1
2020	36	7.4
2025	37	7.7
2030	38	8.0
Percent change 2006-2030	14.1%	23.4%
Annualized change 2006-2030	0.55%	0.88%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	13	2.5
2015	12	2.5
2020	12	2.4
2025	11	2.4
2030	11	2.3
Percent change 2006-2030	-16.1%	-9.2%
Annualized change 2006-2030	-0.73%	-0.40%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	7	1.6
2030	7	1.5
Percent change 2006-2030	-10.2%	-2.9%
Annualized change 2006-2030	-0.45%	-0.12%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	65	13.0
2015	67	13.5
2020	68	13.9
2025	68	14.1
2030	68	14.4
Percent change 2006-2030	7.2%	16.0%
Annualized change 2006-2030	0.29%	0.62%

Mohawk Valley Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 405 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	883	175.7
2015	889	179.2
2020	887	181.5
2025	870	181.3
2030	849	181.0
Percent change 2006-2030	-2.6%	5.4%
Annualized change 2006-2030	-0.11%	0.22%

Figure 406 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	376	74.9	2010	506	100.8
2015	377	76.0	2015	512	103.1
2020	371	75.9	2020	516	105.6
2025	358	74.7	2025	511	106.6
2030	342	72.9	2030	507	108.1
Percent change 2006-2030	-7.9%	-0.4%	Percent change 2006-2030	1.4%	9.6%
Annualized change 2006-2030	-0.34%	-0.01%	Annualized change 2006-2030	0.06%	0.38%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 407 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	376	74.9	2010	199	39.7
2015	377	76.0	2015	200	40.3
2020	371	75.9	2020	197	40.2
2025	358	74.7	2025	189	39.5
2030	342	72.9	2030	178	38.0
Percent change 2006-2030	-7.9%	-0.4%	Percent change 2006-2030	-9.9%	-2.6%
Annualized change 2006-2030	-0.34%	-0.01%	Annualized change 2006-2030	-0.44%	-0.11%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	129	25.7	2010	48	9.5
2015	128	25.7	2015	50	10.0
2020	125	25.6	2020	49	10.0
2025	121	25.2	2025	48	10.1
2030	116	24.7	2030	48	10.2
Percent change 2006-2030	-8.2%	-0.7%	Percent change 2006-2030	1.6%	9.9%
Annualized change 2006-2030	-0.35%	-0.03%	Annualized change 2006-2030	0.07%	0.39%

Non-Primary Care Specialties

Figure 408 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	25	5.1
2015	27	5.5
2020	29	5.8
2025	29	6.1
2030	30	6.4
Percent change 2006-2030	19.2%	28.9%
Annualized change 2006-2030	0.73%	1.06%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	55	11.0
2015	60	12.1
2020	64	13.1
2025	67	14.0
2030	69	14.7
Percent change 2006-2030	30.4%	41.1%
Annualized change 2006-2030	1.11%	1.44%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.5
2015	38	7.7
2020	38	7.7
2025	37	7.6
2030	36	7.6
Percent change 2006-2030	-4.0%	3.8%
Annualized change 2006-2030	-0.17%	0.16%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	3.9
2015	18	3.7
2020	17	3.4
2025	15	3.2
2030	14	3.0
Percent change 2006-2030	-32.0%	-26.4%
Annualized change 2006-2030	-1.59%	-1.27%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	61	12.2
2015	58	11.8
2020	55	11.3
2025	51	10.7
2030	48	10.2
Percent change 2006-2030	-23.8%	-17.6%
Annualized change 2006-2030	-1.12%	-0.80%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	48	9.5
2015	48	9.6
2020	49	10.0
2025	49	10.2
2030	48	10.3
Percent change 2006-2030	2.4%	10.7%
Annualized change 2006-2030	0.10%	0.43%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.8
2015	50	10.2
2020	51	10.5
2025	51	10.7
2030	52	11.1
Percent change 2006-2030	10.3%	19.3%
Annualized change 2006-2030	0.41%	0.74%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	38	7.7
2020	42	8.5
2025	45	9.3
2030	47	10.1
Percent change 2006-2030	48.1%	60.2%
Annualized change 2006-2030	1.65%	1.98%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	32	6.3
2015	33	6.7
2020	33	6.8
2025	33	6.9
2030	33	7.0
Percent change 2006-2030	6.5%	15.2%
Annualized change 2006-2030	0.26%	0.59%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.6
2015	17	3.4
2020	16	3.3
2025	15	3.1
2030	14	3.0
Percent change 2006-2030	-24.7%	-18.6%
Annualized change 2006-2030	-1.18%	-0.85%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.5
2025	7	1.5
2030	7	1.5
Percent change 2006-2030	-12.7%	-5.5%
Annualized change 2006-2030	-0.56%	-0.24%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.7
2015	34	6.8
2020	34	7.0
2025	34	7.0
2030	33	7.1
Percent change 2006-2030	0.9%	9.2%
Annualized change 2006-2030	0.04%	0.37%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	12	2.5
2015	11	2.3
2020	11	2.3
2025	10	2.1
2030	10	2.0
Percent change 2006-2030	-26.2%	-20.2%
Annualized change 2006-2030	-1.26%	-0.93%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.5
2015	7	1.5
2020	7	1.4
2025	6	1.3
2030	6	1.3
Percent change 2006-2030	-24.2%	-18.0%
Annualized change 2006-2030	-1.15%	-0.82%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	64	12.7
2015	64	12.8
2020	63	12.9
2025	61	12.7
2030	59	12.7
Percent change 2006-2030	-5.6%	2.1%
Annualized change 2006-2030	-0.24%	0.09%

Mohawk Valley Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 409 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	900	179.2
2015	920	185.4
2020	926	189.4
2025	921	191.8
2030	910	194.0
Percent change 2006-2030	4.5%	13.0%
Annualized change 2006-2030	0.18%	0.51%

Figure 410 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	384	76.5	2010	516	102.7
2015	391	78.8	2015	529	106.6
2020	390	79.8	2020	536	109.6
2025	383	79.8	2025	538	112.0
2030	371	79.2	2030	538	114.8
Percent change 2006-2030	0.1%	8.3%	Percent change 2006-2030	7.7%	16.5%
Annualized change 2006-2030	0.01%	0.33%	Annualized change 2006-2030	0.31%	0.64%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 411 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	384	76.5	2010	203	40.5
2015	391	78.8	2015	207	41.7
2020	390	79.8	2020	206	42.1
2025	383	79.8	2025	200	41.7
2030	371	79.2	2030	192	40.9
Percent change 2006-2030	0.1%	8.3%	Percent change 2006-2030	-3.2%	4.7%
Annualized change 2006-2030	0.01%	0.33%	Annualized change 2006-2030	-0.13%	0.19%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	132	26.3	2010	49	9.7
2015	134	27.0	2015	50	10.1
2020	134	27.4	2020	51	10.4
2025	132	27.4	2025	51	10.7
2030	128	27.4	2030	51	11.0
Percent change 2006-2030	1.9%	10.2%	Percent change 2006-2030	9.4%	18.3%
Annualized change 2006-2030	0.08%	0.41%	Annualized change 2006-2030	0.37%	0.70%

Non-Primary Care Specialties

Figure 412 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	26	5.2
2015	28	5.7
2020	30	6.1
2025	31	6.4
2030	32	6.8
Percent change 2006-2030	27.3%	37.7%
Annualized change 2006-2030	1.01%	1.34%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	57	11.3
2015	62	12.5
2020	67	13.7
2025	71	14.7
2030	74	15.8
Percent change 2006-2030	39.6%	51.0%
Annualized change 2006-2030	1.40%	1.73%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.6
2015	39	7.8
2020	39	7.9
2025	38	8.0
2030	38	8.1
Percent change 2006-2030	2.2%	10.5%
Annualized change 2006-2030	0.09%	0.42%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	4.0
2015	19	3.8
2020	18	3.6
2025	16	3.4
2030	15	3.3
Percent change 2006-2030	-27.1%	-21.2%
Annualized change 2006-2030	-1.31%	-0.99%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	62	12.4
2015	61	12.2
2020	58	11.8
2025	55	11.4
2030	52	11.1
Percent change 2006-2030	-17.4%	-10.7%
Annualized change 2006-2030	-0.79%	-0.47%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.7
2015	49	9.8
2020	50	10.2
2025	51	10.6
2030	51	10.8
Percent change 2006-2030	7.5%	16.3%
Annualized change 2006-2030	0.30%	0.63%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	50	10.0
2015	52	10.5
2020	53	10.9
2025	54	11.2
2030	54	11.6
Percent change 2006-2030	15.7%	25.1%
Annualized change 2006-2030	0.61%	0.94%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	39	8.0
2020	43	8.8
2025	46	9.7
2030	49	10.4
Percent change 2006-2030	52.9%	65.4%
Annualized change 2006-2030	1.78%	2.12%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	33	6.5
2015	34	6.8
2020	34	7.0
2025	35	7.3
2030	35	7.5
Percent change 2006-2030	14.0%	23.3%
Annualized change 2006-2030	0.55%	0.88%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.7
2015	18	3.6
2020	17	3.4
2025	16	3.3
2030	15	3.2
Percent change 2006-2030	-21.2%	-14.7%
Annualized change 2006-2030	-0.99%	-0.66%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.6
2030	7	1.6
Percent change 2006-2030	-8.6%	-1.2%
Annualized change 2006-2030	-0.38%	-0.05%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.8
2015	35	7.0
2020	35	7.2
2025	35	7.3
2030	35	7.6
Percent change 2006-2030	7.3%	16.1%
Annualized change 2006-2030	0.29%	0.62%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	13	2.5
2015	12	2.4
2020	11	2.3
2025	11	2.3
2030	10	2.2
Percent change 2006-2030	-21.0%	-14.6%
Annualized change 2006-2030	-0.98%	-0.65%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.5
2020	7	1.5
2025	7	1.5
2030	7	1.4
Percent change 2006-2030	-15.6%	-8.7%
Annualized change 2006-2030	-0.70%	-0.38%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	65	12.9
2015	66	13.3
2020	65	13.4
2025	64	13.4
2030	64	13.6
Percent change 2006-2030	0.9%	9.1%
Annualized change 2006-2030	0.04%	0.36%

Mohawk Valley Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 413 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	881	175.3
2015	877	176.8
2020	865	177.0
2025	838	174.6
2030	809	172.4
Percent change 2006-2030	-7.2%	0.4%
Annualized change 2006-2030	-0.31%	0.02%

Figure 414 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	376	74.8	2010	505	100.5
2015	374	75.4	2015	503	101.4
2020	365	74.7	2020	500	102.3
2025	350	72.9	2025	488	101.7
2030	331	70.6	2030	478	101.8
Percent change 2006-2030	-10.7%	-3.5%	Percent change 2006-2030	-4.5%	3.3%
Annualized change 2006-2030	-0.47%	-0.15%	Annualized change 2006-2030	-0.19%	0.14%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 415 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	376	74.8	2010	199	39.7
2015	374	75.4	2015	198	40.0
2020	365	74.7	2020	194	39.6
2025	350	72.9	2025	185	38.5
2030	331	70.6	2030	173	36.8
Percent change 2006-2030	-10.7%	-3.5%	Percent change 2006-2030	-12.7%	-5.6%
Annualized change 2006-2030	-0.47%	-0.15%	Annualized change 2006-2030	-0.57%	-0.24%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	129	25.6	2010	48	9.5
2015	127	25.5	2015	49	9.9
2020	123	25.2	2020	48	9.9
2025	118	24.6	2025	47	9.8
2030	112	23.9	2030	46	9.9
Percent change 2006-2030	-11.0%	-3.8%	Percent change 2006-2030	-1.6%	6.5%
Annualized change 2006-2030	-0.49%	-0.16%	Annualized change 2006-2030	-0.07%	0.26%

Non-Primary Care Specialties

Figure 416 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	25	5.0
2015	27	5.4
2020	28	5.7
2025	28	5.9
2030	28	6.0
Percent change 2006-2030	12.3%	21.5%
Annualized change 2006-2030	0.48%	0.81%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	55	11.0
2015	59	11.9
2020	62	12.7
2025	64	13.3
2030	65	13.9
Percent change 2006-2030	22.9%	32.9%
Annualized change 2006-2030	0.86%	1.19%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.5
2015	37	7.5
2020	36	7.4
2025	35	7.3
2030	33	7.1
Percent change 2006-2030	-9.6%	-2.2%
Annualized change 2006-2030	-0.42%	-0.09%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	3.9
2015	18	3.6
2020	16	3.3
2025	15	3.1
2030	13	2.9
Percent change 2006-2030	-35.9%	-30.7%
Annualized change 2006-2030	-1.84%	-1.52%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	61	12.1
2015	57	11.6
2020	54	11.0
2025	49	10.2
2030	45	9.6
Percent change 2006-2030	-28.2%	-22.3%
Annualized change 2006-2030	-1.37%	-1.05%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	48	9.5
2015	47	9.5
2020	47	9.7
2025	47	9.7
2030	45	9.7
Percent change 2006-2030	-3.6%	4.3%
Annualized change 2006-2030	-0.15%	0.18%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.8
2015	50	10.0
2020	50	10.2
2025	49	10.2
2030	49	10.4
Percent change 2006-2030	3.9%	12.4%
Annualized change 2006-2030	0.16%	0.49%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	6.9
2015	37	7.5
2020	40	8.3
2025	43	8.9
2030	45	9.5
Percent change 2006-2030	39.6%	50.9%
Annualized change 2006-2030	1.40%	1.73%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	32	6.3
2015	33	6.6
2020	32	6.6
2025	31	6.6
2030	31	6.6
Percent change 2006-2030	0.4%	8.6%
Annualized change 2006-2030	0.02%	0.34%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.6
2015	16	3.3
2020	16	3.2
2025	14	2.9
2030	13	2.9
Percent change 2006-2030	-29.1%	-23.3%
Annualized change 2006-2030	-1.42%	-1.10%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	7	1.5
2025	7	1.5
2030	7	1.4
Percent change 2006-2030	-17.7%	-11.0%
Annualized change 2006-2030	-0.81%	-0.48%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	33	6.7
2015	33	6.6
2020	33	6.8
2025	32	6.7
2030	31	6.7
Percent change 2006-2030	-4.9%	2.8%
Annualized change 2006-2030	-0.21%	0.12%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	12	2.4
2015	11	2.2
2020	11	2.2
2025	10	2.0
2030	9	1.9
Percent change 2006-2030	-30.5%	-24.8%
Annualized change 2006-2030	-1.50%	-1.18%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.5
2015	7	1.4
2020	7	1.4
2025	6	1.3
2030	6	1.2
Percent change 2006-2030	-28.6%	-22.7%
Annualized change 2006-2030	-1.39%	-1.07%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	64	12.7
2015	62	12.6
2020	61	12.5
2025	58	12.1
2030	56	12.0
Percent change 2006-2030	-11.1%	-3.8%
Annualized change 2006-2030	-0.49%	-0.16%

Mohawk Valley Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 417 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	900	179.2
2015	920	185.4
2020	926	189.4
2025	921	191.8
2030	910	194.0
Percent change 2006-2030	4.5%	13.0%
Annualized change 2006-2030	0.18%	0.51%

Figure 418 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	384	76.5	2010	516	102.7
2015	392	78.9	2015	528	106.4
2020	391	80.0	2020	535	109.4
2025	384	80.1	2025	536	111.7
2030	373	79.6	2030	536	114.4
Percent change 2006-2030	0.6%	8.9%	Percent change 2006-2030	7.3%	16.1%
Annualized change 2006-2030	0.03%	0.35%	Annualized change 2006-2030	0.29%	0.62%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 419 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	384	76.5	2010	203	40.5
2015	392	78.9	2015	207	41.8
2020	391	80.0	2020	206	42.2
2025	384	80.1	2025	201	41.9
2030	373	79.6	2030	193	41.1
Percent change 2006-2030	0.6%	8.9%	Percent change 2006-2030	-2.7%	5.3%
Annualized change 2006-2030	0.03%	0.35%	Annualized change 2006-2030	-0.11%	0.21%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	132	26.3	2010	49	9.7
2015	134	27.1	2015	50	10.1
2020	134	27.5	2020	51	10.4
2025	132	27.5	2025	51	10.7
2030	129	27.5	2030	52	11.0
Percent change 2006-2030	2.4%	10.8%	Percent change 2006-2030	9.9%	18.9%
Annualized change 2006-2030	0.10%	0.43%	Annualized change 2006-2030	0.40%	0.72%

Non-Primary Care Specialties

Figure 420 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	26	5.2
2015	28	5.7
2020	30	6.0
2025	31	6.4
2030	32	6.8
Percent change 2006-2030	26.9%	37.3%
Annualized change 2006-2030	1.00%	1.33%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	57	11.3
2015	62	12.5
2020	67	13.7
2025	70	14.7
2030	74	15.7
Percent change 2006-2030	39.1%	50.5%
Annualized change 2006-2030	1.39%	1.72%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.6
2015	39	7.8
2020	39	7.9
2025	38	8.0
2030	38	8.0
Percent change 2006-2030	1.8%	10.1%
Annualized change 2006-2030	0.07%	0.40%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	4.0
2015	19	3.8
2020	18	3.6
2025	16	3.4
2030	15	3.3
Percent change 2006-2030	-27.4%	-21.5%
Annualized change 2006-2030	-1.32%	-1.00%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	62	12.4
2015	61	12.2
2020	58	11.8
2025	54	11.4
2030	52	11.1
Percent change 2006-2030	-17.7%	-11.0%
Annualized change 2006-2030	-0.81%	-0.48%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.7
2015	49	9.8
2020	50	10.2
2025	51	10.5
2030	50	10.7
Percent change 2006-2030	7.1%	15.8%
Annualized change 2006-2030	0.29%	0.61%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	50	10.0
2015	52	10.5
2020	53	10.9
2025	54	11.2
2030	54	11.6
Percent change 2006-2030	15.2%	24.7%
Annualized change 2006-2030	0.59%	0.92%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	39	8.0
2020	43	8.8
2025	46	9.6
2030	49	10.4
Percent change 2006-2030	52.3%	64.8%
Annualized change 2006-2030	1.77%	2.10%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	33	6.5
2015	34	6.8
2020	34	7.0
2025	35	7.3
2030	35	7.5
Percent change 2006-2030	13.6%	22.9%
Annualized change 2006-2030	0.53%	0.86%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.7
2015	18	3.6
2020	17	3.4
2025	16	3.3
2030	15	3.2
Percent change 2006-2030	-21.5%	-15.0%
Annualized change 2006-2030	-1.00%	-0.68%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.6
2030	7	1.6
Percent change 2006-2030	-9.0%	-1.5%
Annualized change 2006-2030	-0.39%	-0.06%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.8
2015	35	7.0
2020	35	7.2
2025	35	7.3
2030	35	7.5
Percent change 2006-2030	6.9%	15.7%
Annualized change 2006-2030	0.28%	0.61%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	13	2.5
2015	12	2.4
2020	11	2.3
2025	11	2.2
2030	10	2.2
Percent change 2006-2030	-21.3%	-14.9%
Annualized change 2006-2030	-0.99%	-0.67%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.5
2020	7	1.5
2025	7	1.5
2030	7	1.4
Percent change 2006-2030	-15.9%	-9.0%
Annualized change 2006-2030	-0.72%	-0.39%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	65	12.9
2015	66	13.3
2020	65	13.4
2025	64	13.4
2030	63	13.5
Percent change 2006-2030	0.5%	8.7%
Annualized change 2006-2030	0.02%	0.35%

Mohawk Valley Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 421 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	881	175.3
2015	877	176.8
2020	865	177.0
2025	838	174.6
2030	809	172.4
Percent change 2006-2030	-7.2%	0.4%
Annualized change 2006-2030	-0.31%	0.02%

Figure 422 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	376	74.8	2010	505	100.5
2015	375	75.5	2015	502	101.3
2020	366	74.9	2020	499	102.1
2025	351	73.2	2025	487	101.4
2030	333	71.0	2030	476	101.5
Percent change 2006-2030	-10.3%	-3.0%	Percent change 2006-2030	-4.8%	2.9%
Annualized change 2006-2030	-0.45%	-0.13%	Annualized change 2006-2030	-0.21%	0.12%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 423 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	376	74.8	2010	199	39.7
2015	375	75.5	2015	199	40.0
2020	366	74.9	2020	194	39.7
2025	351	73.2	2025	186	38.7
2030	333	71.0	2030	174	37.0
Percent change 2006-2030	-10.3%	-3.0%	Percent change 2006-2030	-12.3%	-5.2%
Annualized change 2006-2030	-0.45%	-0.13%	Annualized change 2006-2030	-0.55%	-0.22%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	129	25.6	2010	48	9.5
2015	127	25.5	2015	49	9.9
2020	123	25.3	2020	48	9.9
2025	118	24.6	2025	47	9.9
2030	113	24.0	2030	46	9.9
Percent change 2006-2030	-10.6%	-3.3%	Percent change 2006-2030	-1.1%	7.0%
Annualized change 2006-2030	-0.47%	-0.14%	Annualized change 2006-2030	-0.04%	0.28%

Non-Primary Care Specialties

Figure 424 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	25	5.0
2015	27	5.4
2020	28	5.7
2025	28	5.8
2030	28	6.0
Percent change 2006-2030	11.9%	21.0%
Annualized change 2006-2030	0.47%	0.80%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	55	11.0
2015	59	11.9
2020	62	12.6
2025	64	13.3
2030	65	13.8
Percent change 2006-2030	22.4%	32.4%
Annualized change 2006-2030	0.85%	1.18%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.5
2015	37	7.5
2020	36	7.4
2025	35	7.3
2030	33	7.1
Percent change 2006-2030	-9.9%	-2.6%
Annualized change 2006-2030	-0.43%	-0.11%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	3.9
2015	18	3.6
2020	16	3.3
2025	15	3.1
2030	13	2.9
Percent change 2006-2030	-36.2%	-30.9%
Annualized change 2006-2030	-1.85%	-1.53%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	61	12.1
2015	57	11.5
2020	53	10.9
2025	49	10.2
2030	45	9.6
Percent change 2006-2030	-28.4%	-22.6%
Annualized change 2006-2030	-1.38%	-1.06%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	48	9.5
2015	47	9.4
2020	47	9.7
2025	47	9.7
2030	45	9.6
Percent change 2006-2030	-3.9%	4.0%
Annualized change 2006-2030	-0.17%	0.16%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.8
2015	50	10.0
2020	50	10.1
2025	49	10.2
2030	49	10.4
Percent change 2006-2030	3.6%	12.0%
Annualized change 2006-2030	0.15%	0.47%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	6.9
2015	37	7.5
2020	40	8.3
2025	43	8.9
2030	45	9.5
Percent change 2006-2030	39.1%	50.4%
Annualized change 2006-2030	1.38%	1.72%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	32	6.3
2015	33	6.6
2020	32	6.6
2025	31	6.5
2030	31	6.6
Percent change 2006-2030	0.0%	8.2%
Annualized change 2006-2030	0.00%	0.33%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.6
2015	16	3.3
2020	16	3.2
2025	14	2.9
2030	13	2.9
Percent change 2006-2030	-29.3%	-23.6%
Annualized change 2006-2030	-1.44%	-1.11%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	7	1.5
2025	7	1.4
2030	7	1.4
Percent change 2006-2030	-18.0%	-11.3%
Annualized change 2006-2030	-0.82%	-0.50%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	33	6.7
2015	33	6.6
2020	33	6.8
2025	32	6.7
2030	31	6.7
Percent change 2006-2030	-5.2%	2.5%
Annualized change 2006-2030	-0.22%	0.10%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	12	2.4
2015	11	2.2
2020	11	2.2
2025	10	2.0
2030	9	1.9
Percent change 2006-2030	-30.7%	-25.1%
Annualized change 2006-2030	-1.52%	-1.19%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.5
2015	7	1.4
2020	7	1.4
2025	6	1.3
2030	6	1.2
Percent change 2006-2030	-28.8%	-23.0%
Annualized change 2006-2030	-1.41%	-1.08%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	64	12.7
2015	62	12.6
2020	61	12.5
2025	58	12.1
2030	56	11.9
Percent change 2006-2030	-11.4%	-4.1%
Annualized change 2006-2030	-0.50%	-0.18%

Mohawk Valley Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 425 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	900	179.2
2015	920	185.4
2020	926	189.4
2025	921	191.8
2030	910	194.0
Percent change 2006-2030	4.5%	13.0%
Annualized change 2006-2030	0.18%	0.51%

Figure 426 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	385	76.5	2010	516	102.7
2015	392	79.0	2015	528	106.4
2020	392	80.2	2020	534	109.2
2025	385	80.3	2025	535	111.5
2030	375	79.9	2030	535	114.2
Percent change 2006-2030	1.0%	9.2%	Percent change 2006-2030	7.1%	15.8%
Annualized change 2006-2030	0.04%	0.37%	Annualized change 2006-2030	0.28%	0.61%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 427 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	385	76.5	2010	203	40.5
2015	392	79.0	2015	207	41.8
2020	392	80.2	2020	206	42.2
2025	385	80.3	2025	201	42.0
2030	375	79.9	2030	193	41.2
Percent change 2006-2030	1.0%	9.2%	Percent change 2006-2030	-2.4%	5.6%
Annualized change 2006-2030	0.04%	0.37%	Annualized change 2006-2030	-0.10%	0.23%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	132	26.3	2010	49	9.7
2015	134	27.1	2015	50	10.1
2020	134	27.5	2020	51	10.4
2025	133	27.6	2025	51	10.7
2030	129	27.6	2030	52	11.1
Percent change 2006-2030	2.7%	11.1%	Percent change 2006-2030	10.3%	19.3%
Annualized change 2006-2030	0.11%	0.44%	Annualized change 2006-2030	0.41%	0.74%

Non-Primary Care Specialties

Figure 428 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	26	5.2
2015	28	5.6
2020	29	6.0
2025	31	6.4
2030	32	6.8
Percent change 2006-2030	26.6%	37.0%
Annualized change 2006-2030	0.99%	1.32%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	57	11.3
2015	62	12.5
2020	67	13.6
2025	70	14.6
2030	74	15.7
Percent change 2006-2030	38.8%	50.2%
Annualized change 2006-2030	1.38%	1.71%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.6
2015	39	7.8
2020	39	7.9
2025	38	8.0
2030	38	8.0
Percent change 2006-2030	1.6%	9.9%
Annualized change 2006-2030	0.07%	0.39%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	4.0
2015	19	3.8
2020	18	3.6
2025	16	3.4
2030	15	3.2
Percent change 2006-2030	-27.5%	-21.6%
Annualized change 2006-2030	-1.33%	-1.01%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	62	12.4
2015	61	12.2
2020	58	11.8
2025	54	11.3
2030	52	11.0
Percent change 2006-2030	-17.9%	-11.2%
Annualized change 2006-2030	-0.82%	-0.49%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.7
2015	49	9.8
2020	50	10.2
2025	50	10.5
2030	50	10.7
Percent change 2006-2030	6.9%	15.6%
Annualized change 2006-2030	0.28%	0.61%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	50	10.0
2015	52	10.5
2020	53	10.9
2025	54	11.2
2030	54	11.5
Percent change 2006-2030	15.0%	24.4%
Annualized change 2006-2030	0.58%	0.91%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	7.0
2015	39	7.9
2020	43	8.8
2025	46	9.6
2030	49	10.4
Percent change 2006-2030	52.0%	64.4%
Annualized change 2006-2030	1.76%	2.09%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	33	6.5
2015	34	6.8
2020	34	7.0
2025	35	7.2
2030	35	7.5
Percent change 2006-2030	13.4%	22.6%
Annualized change 2006-2030	0.52%	0.85%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.7
2015	18	3.6
2020	17	3.4
2025	16	3.3
2030	15	3.2
Percent change 2006-2030	-21.6%	-15.2%
Annualized change 2006-2030	-1.01%	-0.69%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.6
2030	7	1.5
Percent change 2006-2030	-9.2%	-1.7%
Annualized change 2006-2030	-0.40%	-0.07%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	34	6.8
2015	35	7.0
2020	35	7.1
2025	35	7.3
2030	35	7.5
Percent change 2006-2030	6.7%	15.4%
Annualized change 2006-2030	0.27%	0.60%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	13	2.5
2015	12	2.4
2020	11	2.3
2025	11	2.2
2030	10	2.2
Percent change 2006-2030	-21.5%	-15.1%
Annualized change 2006-2030	-1.00%	-0.68%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.5
2020	7	1.5
2025	7	1.5
2030	7	1.4
Percent change 2006-2030	-16.0%	-9.2%
Annualized change 2006-2030	-0.73%	-0.40%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	65	12.9
2015	66	13.3
2020	65	13.4
2025	64	13.4
2030	63	13.5
Percent change 2006-2030	0.3%	8.5%
Annualized change 2006-2030	0.01%	0.34%

Mohawk Valley Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 429 – Mohawk Valley Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	871	171.7
2010	881	175.3
2015	877	176.8
2020	865	177.0
2025	838	174.6
2030	809	172.4
Percent change 2006-2030	-7.2%	0.4%
Annualized change 2006-2030	-0.31%	0.02%

Figure 430 – Mohawk Valley Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	376	74.8	2010	505	100.5
2015	375	75.6	2015	502	101.2
2020	366	75.0	2020	498	102.0
2025	352	73.4	2025	486	101.2
2030	334	71.2	2030	475	101.3
Percent change 2006-2030	-10.0%	-2.7%	Percent change 2006-2030	-5.0%	2.7%
Annualized change 2006-2030	-0.44%	-0.11%	Annualized change 2006-2030	-0.21%	0.11%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 431 – Mohawk Valley Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	376	74.8	2010	199	39.7
2015	375	75.6	2015	199	40.1
2020	366	75.0	2020	194	39.7
2025	352	73.4	2025	186	38.8
2030	334	71.2	2030	174	37.1
Percent change 2006-2030	-10.0%	-2.7%	Percent change 2006-2030	-12.0%	-4.9%
Annualized change 2006-2030	-0.44%	-0.11%	Annualized change 2006-2030	-0.53%	-0.21%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	129	25.6	2010	48	9.5
2015	127	25.6	2015	49	9.9
2020	124	25.3	2020	49	9.9
2025	119	24.7	2025	47	9.9
2030	113	24.1	2030	47	9.9
Percent change 2006-2030	-10.3%	-3.0%	Percent change 2006-2030	-0.8%	7.3%
Annualized change 2006-2030	-0.45%	-0.13%	Annualized change 2006-2030	-0.03%	0.29%

Non-Primary Care Specialties

Figure 432 – Mohawk Valley Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	25	4.9
2010	25	5.0
2015	27	5.4
2020	28	5.6
2025	28	5.8
2030	28	6.0
Percent change 2006-2030	11.7%	20.8%
Annualized change 2006-2030	0.46%	0.79%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	53	10.4
2010	55	11.0
2015	59	11.9
2020	62	12.6
2025	64	13.3
2030	65	13.8
Percent change 2006-2030	22.2%	32.2%
Annualized change 2006-2030	0.84%	1.17%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	37	7.3
2010	38	7.5
2015	37	7.5
2020	36	7.4
2025	35	7.2
2030	33	7.1
Percent change 2006-2030	-10.1%	-2.8%
Annualized change 2006-2030	-0.44%	-0.12%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	21	4.1
2010	20	3.9
2015	18	3.6
2020	16	3.3
2025	15	3.1
2030	13	2.9
Percent change 2006-2030	-36.3%	-31.1%
Annualized change 2006-2030	-1.86%	-1.54%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	61	12.1
2015	57	11.5
2020	53	10.9
2025	49	10.2
2030	45	9.6
Percent change 2006-2030	-28.6%	-22.8%
Annualized change 2006-2030	-1.39%	-1.07%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	48	9.5
2015	47	9.4
2020	47	9.6
2025	47	9.7
2030	45	9.6
Percent change 2006-2030	-4.1%	3.7%
Annualized change 2006-2030	-0.17%	0.15%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	47	9.3
2010	49	9.8
2015	50	10.0
2020	50	10.1
2025	49	10.2
2030	49	10.4
Percent change 2006-2030	3.4%	11.8%
Annualized change 2006-2030	0.14%	0.47%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	32	6.3
2010	35	6.9
2015	37	7.5
2020	40	8.2
2025	43	8.9
2030	44	9.5
Percent change 2006-2030	38.8%	50.1%
Annualized change 2006-2030	1.37%	1.71%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	31	6.1
2010	32	6.3
2015	33	6.6
2020	32	6.5
2025	31	6.5
2030	31	6.6
Percent change 2006-2030	-0.2%	8.0%
Annualized change 2006-2030	-0.01%	0.32%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	19	3.7
2010	18	3.6
2015	16	3.3
2020	16	3.2
2025	14	2.9
2030	13	2.9
Percent change 2006-2030	-29.5%	-23.7%
Annualized change 2006-2030	-1.44%	-1.12%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	7	1.5
2025	7	1.4
2030	7	1.4
Percent change 2006-2030	-18.2%	-11.5%
Annualized change 2006-2030	-0.83%	-0.51%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	33	6.5
2010	33	6.7
2015	33	6.6
2020	33	6.8
2025	32	6.6
2030	31	6.7
Percent change 2006-2030	-5.4%	2.3%
Annualized change 2006-2030	-0.23%	0.09%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	13	2.6
2010	12	2.4
2015	11	2.2
2020	11	2.2
2025	10	2.0
2030	9	1.9
Percent change 2006-2030	-30.9%	-25.2%
Annualized change 2006-2030	-1.53%	-1.20%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	8	1.6
2010	8	1.5
2015	7	1.4
2020	7	1.4
2025	6	1.3
2030	6	1.2
Percent change 2006-2030	-29.0%	-23.2%
Annualized change 2006-2030	-1.41%	-1.09%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	63	12.4
2010	64	12.7
2015	62	12.6
2020	61	12.5
2025	58	12.1
2030	56	11.9
Percent change 2006-2030	-11.5%	-4.3%
Annualized change 2006-2030	-0.51%	-0.18%

New York City Physician Supply, 2006 – 2030

New York City Supply Scenario 1: Baseline (Supply Not Responsive to Demand)

Figure 433 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,040	495.1
2015	42,337	497.6
2020	43,071	493.9
2025	43,343	486.4
2030	43,394	478.3
Percent change 2006-2030	9.7%	-1.8%
Annualized change 2006-2030	0.39%	-0.08%

Figure 434 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,954	168.3	2010	27,087	326.8
2015	14,260	167.6	2015	28,078	330.0
2020	14,354	164.6	2020	28,717	329.3
2025	14,256	160.0	2025	29,087	326.4
2030	14,040	154.7	2030	29,354	323.5
Percent change 2006-2030	5.2%	-5.9%	Percent change 2006-2030	12.1%	0.3%
Annualized change 2006-2030	0.21%	-0.25%	Annualized change 2006-2030	0.48%	0.01%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 435 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,954	168.3	2010	1,784	21.5
2015	14,260	167.6	2015	1,825	21.5
2020	14,354	164.6	2020	1,822	20.9
2025	14,256	160.0	2025	1,783	20.0
2030	14,040	154.7	2030	1,716	18.9
Percent change 2006-2030	5.2%	-5.9%	Percent change 2006-2030	-1.2%	-11.6%
Annualized change 2006-2030	0.21%	-0.25%	Annualized change 2006-2030	-0.05%	-0.51%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,848	106.7	2010	3,321	40.1
2015	9,016	106.0	2015	3,419	40.2
2020	9,042	103.7	2020	3,489	40.0
2025	8,941	100.3	2025	3,532	39.6
2030	8,756	96.5	2030	3,568	39.3
Percent change 2006-2030	4.0%	-6.9%	Percent change 2006-2030	11.6%	-0.1%
Annualized change 2006-2030	0.16%	-0.30%	Annualized change 2006-2030	0.46%	0.00%

Non-Primary Care Specialties

Figure 436 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,220	14.7
2015	1,318	15.5
2020	1,399	16.0
2025	1,462	16.4
2030	1,525	16.8
Percent change 2006-2030	31.0%	17.2%
Annualized change 2006-2030	1.13%	0.66%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,244	63.3
2015	5,791	68.1
2020	6,269	71.9
2025	6,660	74.7
2030	7,019	77.4
Percent change 2006-2030	43.6%	28.5%
Annualized change 2006-2030	1.52%	1.05%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,092	25.2
2015	2,145	25.2
2020	2,163	24.8
2025	2,155	24.2
2030	2,135	23.5
Percent change 2006-2030	5.1%	-6.0%
Annualized change 2006-2030	0.21%	-0.26%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	824	9.9
2015	782	9.2
2020	739	8.5
2025	694	7.8
2030	648	7.1
Percent change 2006-2030	-25.0%	-32.9%
Annualized change 2006-2030	-1.19%	-1.65%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,716	44.8
2015	3,654	42.9
2020	3,503	40.2
2025	3,340	37.5
2030	3,199	35.3
Percent change 2006-2030	-15.0%	-24.0%
Annualized change 2006-2030	-0.68%	-1.14%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,818	21.9
2015	1,831	21.5
2020	1,898	21.8
2025	1,933	21.7
2030	1,939	21.4
Percent change 2006-2030	10.6%	-1.1%
Annualized change 2006-2030	0.42%	-0.04%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,804	21.8
2015	1,894	22.3
2020	1,947	22.3
2025	1,982	22.2
2030	2,008	22.1
Percent change 2006-2030	19.0%	6.5%
Annualized change 2006-2030	0.73%	0.26%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,433	17.3
2015	1,620	19.0
2020	1,786	20.5
2025	1,929	21.7
2030	2,046	22.5
Percent change 2006-2030	57.2%	40.7%
Annualized change 2006-2030	1.90%	1.43%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,476	17.8
2015	1,546	18.2
2020	1,582	18.1
2025	1,619	18.2
2030	1,646	18.1
Percent change 2006-2030	17.3%	4.9%
Annualized change 2006-2030	0.67%	0.20%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	981	11.8
2015	945	11.1
2020	905	10.4
2025	856	9.6
2030	817	9.0
Percent change 2006-2030	-18.9%	-27.4%
Annualized change 2006-2030	-0.87%	-1.33%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	414	5.0
2015	417	4.9
2020	408	4.7
2025	402	4.5
2030	388	4.3
Percent change 2006-2030	-6.0%	-15.9%
Annualized change 2006-2030	-0.26%	-0.72%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	910	11.0
2015	931	10.9
2020	949	10.9
2025	959	10.8
2030	970	10.7
Percent change 2006-2030	10.4%	-1.2%
Annualized change 2006-2030	0.41%	-0.05%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	414	5.0
2015	396	4.7
2020	377	4.3
2025	361	4.1
2030	345	3.8
Percent change 2006-2030	-18.8%	-27.3%
Annualized change 2006-2030	-0.86%	-1.32%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	690	8.3
2015	675	7.9
2020	658	7.5
2025	633	7.1
2030	605	6.7
Percent change 2006-2030	-13.1%	-22.3%
Annualized change 2006-2030	-0.59%	-1.04%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,050	48.9
2015	4,133	48.6
2020	4,136	47.4
2025	4,101	46.0
2030	4,064	44.8
Percent change 2006-2030	3.8%	-7.2%
Annualized change 2006-2030	0.15%	-0.31%

New York City Supply Scenario 1: Baseline (Supply Responsive to Demand)

Figure 437 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,382	499.2
2015	43,208	507.9
2020	44,465	509.9
2025	45,239	507.7
2030	45,851	505.4
Percent change 2006-2030	15.9%	3.7%
Annualized change 2006-2030	0.62%	0.15%

Figure 438 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,087	169.9	2010	27,295	329.3
2015	14,569	171.2	2015	28,639	336.6
2020	14,816	169.9	2020	29,648	340.0
2025	14,853	166.7	2025	30,387	341.0
2030	14,789	163.0	2030	31,063	342.4
Percent change 2006-2030	10.8%	-0.9%	Percent change 2006-2030	18.6%	6.1%
Annualized change 2006-2030	0.43%	-0.04%	Annualized change 2006-2030	0.71%	0.25%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 439 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,087	169.9	2010	1,806	21.8
2015	14,569	171.2	2015	1,881	22.1
2020	14,816	169.9	2020	1,911	21.9
2025	14,853	166.7	2025	1,901	21.3
2030	14,789	163.0	2030	1,863	20.5
Percent change 2006-2030	10.8%	-0.9%	Percent change 2006-2030	7.3%	-3.9%
Annualized change 2006-2030	0.43%	-0.04%	Annualized change 2006-2030	0.30%	-0.17%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,902	107.4	2010	3,379	40.8
2015	9,166	107.7	2015	3,521	41.4
2020	9,289	106.5	2020	3,617	41.5
2025	9,274	104.1	2025	3,678	41.3
2030	9,177	101.1	2030	3,749	41.3
Percent change 2006-2030	9.0%	-2.5%	Percent change 2006-2030	17.3%	5.0%
Annualized change 2006-2030	0.36%	-0.10%	Annualized change 2006-2030	0.67%	0.20%

Non-Primary Care Specialties

Figure 440 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,229	14.8
2015	1,348	15.8
2020	1,451	16.6
2025	1,536	17.2
2030	1,625	17.9
Percent change 2006-2030	39.6%	24.9%
Annualized change 2006-2030	1.40%	0.93%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,283	63.7
2015	5,903	69.4
2020	6,470	74.2
2025	6,954	78.0
2030	7,423	81.8
Percent change 2006-2030	51.9%	35.9%
Annualized change 2006-2030	1.76%	1.29%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,103	25.4
2015	2,176	25.6
2020	2,218	25.4
2025	2,237	25.1
2030	2,242	24.7
Percent change 2006-2030	10.3%	-1.3%
Annualized change 2006-2030	0.41%	-0.05%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	831	10.0
2015	797	9.4
2020	764	8.8
2025	727	8.2
2030	688	7.6
Percent change 2006-2030	-20.4%	-28.8%
Annualized change 2006-2030	-0.95%	-1.40%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,739	45.1
2015	3,712	43.6
2020	3,592	41.2
2025	3,456	38.8
2030	3,342	36.8
Percent change 2006-2030	-11.2%	-20.6%
Annualized change 2006-2030	-0.49%	-0.95%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,832	22.1
2015	1,870	22.0
2020	1,962	22.5
2025	2,022	22.7
2030	2,057	22.7
Percent change 2006-2030	17.3%	4.9%
Annualized change 2006-2030	0.67%	0.20%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,820	22.0
2015	1,939	22.8
2020	2,017	23.1
2025	2,077	23.3
2030	2,134	23.5
Percent change 2006-2030	26.4%	13.1%
Annualized change 2006-2030	0.98%	0.52%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,449	17.5
2015	1,660	19.5
2020	1,853	21.2
2025	2,029	22.8
2030	2,181	24.0
Percent change 2006-2030	67.7%	50.0%
Annualized change 2006-2030	2.18%	1.70%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,488	18.0
2015	1,579	18.6
2020	1,638	18.8
2025	1,697	19.0
2030	1,749	19.3
Percent change 2006-2030	24.6%	11.5%
Annualized change 2006-2030	0.92%	0.45%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	988	11.9
2015	964	11.3
2020	933	10.7
2025	892	10.0
2030	861	9.5
Percent change 2006-2030	-14.5%	-23.5%
Annualized change 2006-2030	-0.65%	-1.11%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	418	5.0
2015	426	5.0
2020	422	4.8
2025	421	4.7
2030	412	4.5
Percent change 2006-2030	-0.3%	-10.8%
Annualized change 2006-2030	-0.01%	-0.47%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	918	11.1
2015	953	11.2
2020	984	11.3
2025	1,009	11.3
2030	1,035	11.4
Percent change 2006-2030	17.7%	5.4%
Annualized change 2006-2030	0.68%	0.22%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	419	5.1
2015	407	4.8
2020	393	4.5
2025	382	4.3
2030	371	4.1
Percent change 2006-2030	-12.7%	-21.9%
Annualized change 2006-2030	-0.56%	-1.02%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	697	8.4
2015	690	8.1
2020	683	7.8
2025	667	7.5
2030	647	7.1
Percent change 2006-2030	-7.2%	-16.9%
Annualized change 2006-2030	-0.31%	-0.77%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,081	49.2
2015	4,216	49.6
2020	4,268	48.9
2025	4,281	48.0
2030	4,296	47.3
Percent change 2006-2030	9.7%	-1.9%
Annualized change 2006-2030	0.39%	-0.08%

New York City Supply Scenario 2a: NP/PA High Growth (Supply Not Responsive to Demand)

Figure 441 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,869	505.1
2015	44,198	519.5
2020	45,950	526.9
2025	47,227	530.0
2030	48,314	532.5
Percent change 2006-2030	22.2%	9.3%
Annualized change 2006-2030	0.84%	0.37%

Figure 442 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,335	172.9	2010	27,533	332.2
2015	15,135	177.9	2015	29,062	341.6
2020	15,701	180.0	2020	30,249	346.9
2025	16,066	180.3	2025	31,161	349.7
2030	16,326	179.9	2030	31,988	352.6
Percent change 2006-2030	22.3%	9.4%	Percent change 2006-2030	22.1%	9.3%
Annualized change 2006-2030	0.84%	0.38%	Annualized change 2006-2030	0.84%	0.37%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 443 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,335	172.9	2010	1,833	22.1
2015	15,135	177.9	2015	1,937	22.8
2020	15,701	180.0	2020	1,993	22.9
2025	16,066	180.3	2025	2,009	22.5
2030	16,326	179.9	2030	1,995	22.0
Percent change 2006-2030	22.3%	9.4%	Percent change 2006-2030	14.9%	2.8%
Annualized change 2006-2030	0.84%	0.38%	Annualized change 2006-2030	0.58%	0.12%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	9,091	109.7	2010	3,412	41.2
2015	9,569	112.5	2015	3,629	42.7
2020	9,891	113.4	2020	3,817	43.8
2025	10,076	113.1	2025	3,981	44.7
2030	10,182	112.2	2030	4,149	45.7
Percent change 2006-2030	20.9%	8.2%	Percent change 2006-2030	29.8%	16.2%
Annualized change 2006-2030	0.79%	0.33%	Annualized change 2006-2030	1.09%	0.63%

Non-Primary Care Specialties

Figure 444 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,240	15.0
2015	1,364	16.0
2020	1,473	16.9
2025	1,566	17.6
2030	1,662	18.3
Percent change 2006-2030	42.7%	27.7%
Annualized change 2006-2030	1.49%	1.03%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,331	64.3
2015	5,994	70.5
2020	6,603	75.7
2025	7,135	80.1
2030	7,649	84.3
Percent change 2006-2030	56.5%	40.1%
Annualized change 2006-2030	1.88%	1.41%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,126	25.6
2015	2,221	26.1
2020	2,278	26.1
2025	2,309	25.9
2030	2,327	25.6
Percent change 2006-2030	14.5%	2.5%
Annualized change 2006-2030	0.57%	0.10%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	838	10.1
2015	809	9.5
2020	778	8.9
2025	744	8.3
2030	706	7.8
Percent change 2006-2030	-18.3%	-26.9%
Annualized change 2006-2030	-0.84%	-1.30%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,777	45.6
2015	3,782	44.5
2020	3,690	42.3
2025	3,578	40.2
2030	3,486	38.4
Percent change 2006-2030	-7.4%	-17.2%
Annualized change 2006-2030	-0.32%	-0.78%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,848	22.3
2015	1,895	22.3
2020	1,999	22.9
2025	2,071	23.2
2030	2,113	23.3
Percent change 2006-2030	20.5%	7.8%
Annualized change 2006-2030	0.78%	0.31%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,834	22.1
2015	1,961	23.0
2020	2,050	23.5
2025	2,123	23.8
2030	2,188	24.1
Percent change 2006-2030	29.6%	16.0%
Annualized change 2006-2030	1.09%	0.62%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,457	17.6
2015	1,677	19.7
2020	1,881	21.6
2025	2,067	23.2
2030	2,229	24.6
Percent change 2006-2030	71.4%	53.3%
Annualized change 2006-2030	2.27%	1.80%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,500	18.1
2015	1,601	18.8
2020	1,667	19.1
2025	1,734	19.5
2030	1,794	19.8
Percent change 2006-2030	27.8%	14.4%
Annualized change 2006-2030	1.03%	0.56%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	997	12.0
2015	978	11.5
2020	953	10.9
2025	917	10.3
2030	890	9.8
Percent change 2006-2030	-11.6%	-20.9%
Annualized change 2006-2030	-0.51%	-0.97%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	421	5.1
2015	431	5.1
2020	430	4.9
2025	431	4.8
2030	423	4.7
Percent change 2006-2030	2.4%	-8.4%
Annualized change 2006-2030	0.10%	-0.36%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	925	11.2
2015	964	11.3
2020	999	11.5
2025	1,028	11.5
2030	1,057	11.7
Percent change 2006-2030	20.3%	7.6%
Annualized change 2006-2030	0.77%	0.31%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	421	5.1
2015	410	4.8
2020	397	4.5
2025	387	4.3
2030	376	4.1
Percent change 2006-2030	-11.5%	-20.8%
Annualized change 2006-2030	-0.51%	-0.97%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	702	8.5
2015	698	8.2
2020	693	7.9
2025	679	7.6
2030	660	7.3
Percent change 2006-2030	-5.3%	-15.3%
Annualized change 2006-2030	-0.23%	-0.69%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,117	49.7
2015	4,278	50.3
2020	4,356	50.0
2025	4,393	49.3
2030	4,429	48.8
Percent change 2006-2030	13.1%	1.2%
Annualized change 2006-2030	0.51%	0.05%

New York City Supply Scenario 2a: NP/PA High Growth (Supply Responsive to Demand)

Figure 445 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	42,217	509.3
2015	45,089	530.0
2020	47,396	543.5
2025	49,235	552.5
2030	50,991	562.0
Percent change 2006-2030	28.9%	15.4%
Annualized change 2006-2030	1.06%	0.60%

Figure 446 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,495	174.9	2010	27,722	334.4
2015	15,484	182.0	2015	29,605	348.0
2020	16,235	186.2	2020	31,161	357.3
2025	16,780	188.3	2025	32,455	364.2
2030	17,263	190.3	2030	33,728	371.7
Percent change 2006-2030	29.3%	15.7%	Percent change 2006-2030	28.7%	15.2%
Annualized change 2006-2030	1.08%	0.61%	Annualized change 2006-2030	1.06%	0.59%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 447 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,495	174.9	2010	1,859	22.4
2015	15,484	182.0	2015	1,999	23.5
2020	16,235	186.2	2020	2,094	24.0
2025	16,780	188.3	2025	2,148	24.1
2030	17,263	190.3	2030	2,175	24.0
Percent change 2006-2030	29.3%	15.7%	Percent change 2006-2030	25.3%	12.1%
Annualized change 2006-2030	1.08%	0.61%	Annualized change 2006-2030	0.94%	0.48%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	9,160	110.5	2010	3,476	41.9
2015	9,742	114.5	2015	3,742	44.0
2020	10,178	116.7	2020	3,963	45.4
2025	10,477	117.6	2025	4,156	46.6
2030	10,712	118.1	2030	4,376	48.2
Percent change 2006-2030	27.2%	13.8%	Percent change 2006-2030	36.9%	22.5%
Annualized change 2006-2030	1.01%	0.54%	Annualized change 2006-2030	1.32%	0.85%

Non-Primary Care Specialties

Figure 448 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,249	15.1
2015	1,393	16.4
2020	1,525	17.5
2025	1,640	18.4
2030	1,765	19.4
Percent change 2006-2030	51.6%	35.7%
Annualized change 2006-2030	1.75%	1.28%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,366	64.7
2015	6,103	71.7
2020	6,801	78.0
2025	7,427	83.3
2030	8,060	88.8
Percent change 2006-2030	64.9%	47.6%
Annualized change 2006-2030	2.11%	1.64%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,136	25.8
2015	2,249	26.4
2020	2,331	26.7
2025	2,389	26.8
2030	2,435	26.8
Percent change 2006-2030	19.8%	7.2%
Annualized change 2006-2030	0.76%	0.29%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	844	10.2
2015	824	9.7
2020	803	9.2
2025	777	8.7
2030	747	8.2
Percent change 2006-2030	-13.6%	-22.7%
Annualized change 2006-2030	-0.61%	-1.07%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,798	45.8
2015	3,837	45.1
2020	3,775	43.3
2025	3,691	41.4
2030	3,629	40.0
Percent change 2006-2030	-3.6%	-13.7%
Annualized change 2006-2030	-0.15%	-0.61%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,861	22.5
2015	1,933	22.7
2020	2,062	23.6
2025	2,160	24.2
2030	2,233	24.6
Percent change 2006-2030	27.3%	13.9%
Annualized change 2006-2030	1.01%	0.54%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,849	22.3
2015	2,004	23.6
2020	2,120	24.3
2025	2,218	24.9
2030	2,317	25.5
Percent change 2006-2030	37.3%	22.8%
Annualized change 2006-2030	1.33%	0.86%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,471	17.7
2015	1,716	20.2
2020	1,947	22.3
2025	2,167	24.3
2030	2,368	26.1
Percent change 2006-2030	82.0%	62.9%
Annualized change 2006-2030	2.53%	2.05%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,512	18.2
2015	1,632	19.2
2020	1,721	19.7
2025	1,812	20.3
2030	1,899	20.9
Percent change 2006-2030	35.3%	21.0%
Annualized change 2006-2030	1.27%	0.80%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	1,004	12.1
2015	996	11.7
2020	981	11.2
2025	953	10.7
2030	935	10.3
Percent change 2006-2030	-7.1%	-16.9%
Annualized change 2006-2030	-0.31%	-0.77%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	424	5.1
2015	441	5.2
2020	444	5.1
2025	450	5.0
2030	447	4.9
Percent change 2006-2030	8.3%	-3.1%
Annualized change 2006-2030	0.33%	-0.13%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	932	11.2
2015	986	11.6
2020	1,034	11.9
2025	1,077	12.1
2030	1,124	12.4
Percent change 2006-2030	27.9%	14.4%
Annualized change 2006-2030	1.03%	0.56%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	425	5.1
2015	420	4.9
2020	413	4.7
2025	408	4.6
2030	403	4.4
Percent change 2006-2030	-5.2%	-15.2%
Annualized change 2006-2030	-0.22%	-0.68%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	708	8.5
2015	714	8.4
2020	718	8.2
2025	713	8.0
2030	702	7.7
Percent change 2006-2030	0.8%	-9.8%
Annualized change 2006-2030	0.03%	-0.43%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,144	50.0
2015	4,358	51.2
2020	4,486	51.4
2025	4,573	51.3
2030	4,665	51.4
Percent change 2006-2030	19.1%	6.6%
Annualized change 2006-2030	0.73%	0.27%

New York City Supply Scenario 2b: NP/PA Lower Growth (Supply Not Responsive to Demand)

Figure 449 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,638	502.3
2015	43,391	510.0
2020	44,567	511.0
2025	45,268	508.0
2030	45,778	504.5
Percent change 2006-2030	15.7%	3.6%
Annualized change 2006-2030	0.61%	0.15%

Figure 450 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,226	171.6	2010	27,413	330.7
2015	14,751	173.4	2015	28,640	336.6
2020	15,042	172.5	2020	29,525	338.6
2025	15,132	169.8	2025	30,136	338.2
2030	15,117	166.6	2030	30,661	337.9
Percent change 2006-2030	13.2%	1.3%	Percent change 2006-2030	17.0%	4.7%
Annualized change 2006-2030	0.52%	0.05%	Annualized change 2006-2030	0.66%	0.19%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 451 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,226	171.6	2010	1,819	21.9
2015	14,751	173.4	2015	1,888	22.2
2020	15,042	172.5	2020	1,909	21.9
2025	15,132	169.8	2025	1,892	21.2
2030	15,117	166.6	2030	1,847	20.4
Percent change 2006-2030	13.2%	1.3%	Percent change 2006-2030	6.4%	-4.8%
Annualized change 2006-2030	0.52%	0.05%	Annualized change 2006-2030	0.26%	-0.20%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	9,021	108.8	2010	3,386	40.8
2015	9,326	109.6	2015	3,537	41.6
2020	9,476	108.7	2020	3,657	41.9
2025	9,490	106.5	2025	3,749	42.1
2030	9,428	103.9	2030	3,842	42.3
Percent change 2006-2030	12.0%	0.2%	Percent change 2006-2030	20.2%	7.6%
Annualized change 2006-2030	0.47%	0.01%	Annualized change 2006-2030	0.77%	0.30%

Non-Primary Care Specialties

Figure 452 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,234	14.9
2015	1,345	15.8
2020	1,438	16.5
2025	1,514	17.0
2030	1,593	17.6
Percent change 2006-2030	36.8%	22.4%
Annualized change 2006-2030	1.31%	0.85%

Obstetrics and Gynecology

Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,117	25.5
2015	2,188	25.7
2020	2,224	25.5
2025	2,233	25.1
2030	2,231	24.6
Percent change 2006-2030	9.8%	-1.8%
Annualized change 2006-2030	0.39%	-0.07%

Psychiatry

Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,761	45.4
2015	3,727	43.8
2020	3,602	41.3
2025	3,460	38.8
2030	3,341	36.8
Percent change 2006-2030	-11.3%	-20.6%
Annualized change 2006-2030	-0.50%	-0.96%

Radiology

Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,826	22.0
2015	1,932	22.7
2020	2,001	22.9
2025	2,053	23.0
2030	2,097	23.1
Percent change 2006-2030	24.3%	11.2%
Annualized change 2006-2030	0.91%	0.44%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,493	18.0
2015	1,577	18.5
2020	1,627	18.7
2025	1,677	18.8
2030	1,720	19.0
Percent change 2006-2030	22.5%	9.6%
Annualized change 2006-2030	0.85%	0.38%

Other Internal Medicine Subspecialties

Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,308	64.0
2015	5,907	69.4
2020	6,445	73.9
2025	6,900	77.4
2030	7,331	80.8
Percent change 2006-2030	50.0%	34.2%
Annualized change 2006-2030	1.70%	1.23%

Pathology

Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	834	10.1
2015	797	9.4
2020	760	8.7
2025	719	8.1
2030	676	7.5
Percent change 2006-2030	-21.7%	-29.9%
Annualized change 2006-2030	-1.01%	-1.47%

Anesthesiology

Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,840	22.2
2015	1,867	21.9
2020	1,951	22.4
2025	2,003	22.5
2030	2,026	22.3
Percent change 2006-2030	15.5%	3.3%
Annualized change 2006-2030	0.60%	0.14%

Emergency Medicine

Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,450	17.5
2015	1,652	19.4
2020	1,836	21.1
2025	1,999	22.4
2030	2,137	23.6
Percent change 2006-2030	64.2%	47.0%
Annualized change 2006-2030	2.09%	1.62%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	993	12.0
2015	964	11.3
2020	930	10.7
2025	887	10.0
2030	853	9.4
Percent change 2006-2030	-15.3%	-24.2%
Annualized change 2006-2030	-0.69%	-1.15%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	419	5.1
2015	425	5.0
2020	419	4.8
2025	417	4.7
2030	405	4.5
Percent change 2006-2030	-1.8%	-12.2%
Annualized change 2006-2030	-0.08%	-0.54%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	921	11.1
2015	950	11.2
2020	975	11.2
2025	994	11.2
2030	1,014	11.2
Percent change 2006-2030	15.3%	3.2%
Annualized change 2006-2030	0.60%	0.13%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	419	5.1
2015	404	4.7
2020	387	4.4
2025	374	4.2
2030	361	4.0
Percent change 2006-2030	-15.1%	-24.1%
Annualized change 2006-2030	-0.68%	-1.14%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	699	8.4
2015	688	8.1
2020	677	7.8
2025	656	7.4
2030	632	7.0
Percent change 2006-2030	-9.3%	-18.8%
Annualized change 2006-2030	-0.40%	-0.86%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,099	49.5
2015	4,216	49.6
2020	4,252	48.8
2025	4,249	47.7
2030	4,245	46.8
Percent change 2006-2030	8.4%	-3.0%
Annualized change 2006-2030	0.34%	-0.13%

New York City Supply Scenario 2b: NP/PA Lower Growth (Supply Responsive to Demand)

Figure 453 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,984	506.5
2015	44,265	520.3
2020	45,969	527.1
2025	47,192	529.6
2030	48,314	532.5
Percent change 2006-2030	22.2%	9.3%
Annualized change 2006-2030	0.84%	0.37%

Figure 454 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,384	173.5	2010	27,601	333.0
2015	15,090	177.4	2015	29,175	342.9
2020	15,553	178.3	2020	30,415	348.8
2025	15,805	177.4	2025	31,387	352.2
2030	15,985	176.2	2030	32,329	356.3
Percent change 2006-2030	19.7%	7.1%	Percent change 2006-2030	23.4%	10.4%
Annualized change 2006-2030	0.75%	0.29%	Annualized change 2006-2030	0.88%	0.41%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 455 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,384	173.5	2010	1,844	22.2
2015	15,090	177.4	2015	1,949	22.9
2020	15,553	178.3	2020	2,006	23.0
2025	15,805	177.4	2025	2,023	22.7
2030	15,985	176.2	2030	2,014	22.2
Percent change 2006-2030	19.7%	7.1%	Percent change 2006-2030	16.0%	3.8%
Annualized change 2006-2030	0.75%	0.29%	Annualized change 2006-2030	0.62%	0.16%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	9,090	109.7	2010	3,450	41.6
2015	9,494	111.6	2015	3,647	42.9
2020	9,751	111.8	2020	3,797	43.5
2025	9,868	110.7	2025	3,914	43.9
2030	9,919	109.3	2030	4,052	44.7
Percent change 2006-2030	17.8%	5.4%	Percent change 2006-2030	26.8%	13.4%
Annualized change 2006-2030	0.69%	0.22%	Annualized change 2006-2030	0.99%	0.53%

Non-Primary Care Specialties

Figure 456 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,243	15.0
2015	1,373	16.1
2020	1,489	17.1
2025	1,586	17.8
2030	1,691	18.6
Percent change 2006-2030	45.3%	30.0%
Annualized change 2006-2030	1.57%	1.10%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,342	64.4
2015	6,014	70.7
2020	6,638	76.1
2025	7,182	80.6
2030	7,725	85.1
Percent change 2006-2030	58.1%	41.5%
Annualized change 2006-2030	1.93%	1.46%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,127	25.7
2015	2,217	26.1
2020	2,275	26.1
2025	2,311	25.9
2030	2,334	25.7
Percent change 2006-2030	14.8%	2.8%
Annualized change 2006-2030	0.58%	0.11%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	840	10.1
2015	812	9.5
2020	784	9.0
2025	751	8.4
2030	716	7.9
Percent change 2006-2030	-17.2%	-25.9%
Annualized change 2006-2030	-0.78%	-1.24%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,781	45.6
2015	3,781	44.4
2020	3,685	42.3
2025	3,570	40.1
2030	3,479	38.3
Percent change 2006-2030	-7.6%	-17.3%
Annualized change 2006-2030	-0.33%	-0.79%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,853	22.4
2015	1,905	22.4
2020	2,012	23.1
2025	2,089	23.4
2030	2,140	23.6
Percent change 2006-2030	22.0%	9.2%
Annualized change 2006-2030	0.83%	0.37%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,841	22.2
2015	1,975	23.2
2020	2,069	23.7
2025	2,145	24.1
2030	2,221	24.5
Percent change 2006-2030	31.6%	17.7%
Annualized change 2006-2030	1.15%	0.68%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,465	17.7
2015	1,691	19.9
2020	1,901	21.8
2025	2,096	23.5
2030	2,270	25.0
Percent change 2006-2030	74.5%	56.1%
Annualized change 2006-2030	2.35%	1.87%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,505	18.2
2015	1,609	18.9
2020	1,680	19.3
2025	1,753	19.7
2030	1,820	20.1
Percent change 2006-2030	29.6%	16.0%
Annualized change 2006-2030	1.09%	0.62%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	999	12.1
2015	982	11.5
2020	957	11.0
2025	922	10.3
2030	896	9.9
Percent change 2006-2030	-11.0%	-20.3%
Annualized change 2006-2030	-0.48%	-0.94%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	422	5.1
2015	434	5.1
2020	433	5.0
2025	435	4.9
2030	429	4.7
Percent change 2006-2030	3.8%	-7.1%
Annualized change 2006-2030	0.16%	-0.31%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	928	11.2
2015	971	11.4
2020	1,009	11.6
2025	1,042	11.7
2030	1,077	11.9
Percent change 2006-2030	22.5%	9.7%
Annualized change 2006-2030	0.85%	0.39%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	423	5.1
2015	414	4.9
2020	403	4.6
2025	395	4.4
2030	386	4.3
Percent change 2006-2030	-9.2%	-18.7%
Annualized change 2006-2030	-0.40%	-0.86%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	704	8.5
2015	703	8.3
2020	701	8.0
2025	689	7.7
2030	673	7.4
Percent change 2006-2030	-3.4%	-13.6%
Annualized change 2006-2030	-0.14%	-0.61%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,126	49.8
2015	4,295	50.5
2020	4,379	50.2
2025	4,422	49.6
2030	4,471	49.3
Percent change 2006-2030	14.1%	2.1%
Annualized change 2006-2030	0.55%	0.09%

New York City Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 457 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,092	495.7
2015	42,652	501.3
2020	43,647	500.5
2025	44,181	495.8
2030	44,442	489.8
Percent change 2006-2030	12.4%	0.6%
Annualized change 2006-2030	0.49%	0.02%

Figure 458 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,971	168.5	2010	27,121	327.2
2015	14,364	168.8	2015	28,287	332.5
2020	14,545	166.8	2020	29,102	333.7
2025	14,535	163.1	2025	29,646	332.7
2030	14,389	158.6	2030	30,053	331.2
Percent change 2006-2030	7.8%	-3.6%	Percent change 2006-2030	14.7%	2.7%
Annualized change 2006-2030	0.31%	-0.15%	Annualized change 2006-2030	0.57%	0.11%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 459– New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,971	168.5	2010	1,787	21.6
2015	14,364	168.8	2015	1,839	21.6
2020	14,545	166.8	2020	1,847	21.2
2025	14,535	163.1	2025	1,818	20.4
2030	14,389	158.6	2030	1,758	19.4
Percent change 2006-2030	7.8%	-3.6%	Percent change 2006-2030	1.3%	-9.4%
Annualized change 2006-2030	0.31%	-0.15%	Annualized change 2006-2030	0.05%	-0.41%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,859	106.9	2010	3,325	40.1
2015	9,082	106.7	2015	3,444	40.5
2020	9,163	105.1	2020	3,535	40.5
2025	9,116	102.3	2025	3,601	40.4
2030	8,974	98.9	2030	3,657	40.3
Percent change 2006-2030	6.6%	-4.6%	Percent change 2006-2030	14.4%	2.4%
Annualized change 2006-2030	0.27%	-0.20%	Annualized change 2006-2030	0.56%	0.10%

Non-Primary Care Specialties

Figure 460 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,221	14.7
2015	1,328	15.6
2020	1,417	16.3
2025	1,490	16.7
2030	1,561	17.2
Percent change 2006-2030	34.1%	20.0%
Annualized change 2006-2030	1.23%	0.76%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,251	63.3
2015	5,834	68.6
2020	6,353	72.8
2025	6,788	76.2
2030	7,186	79.2
Percent change 2006-2030	47.0%	31.6%
Annualized change 2006-2030	1.62%	1.15%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,094	25.3
2015	2,161	25.4
2020	2,192	25.1
2025	2,197	24.7
2030	2,186	24.1
Percent change 2006-2030	7.6%	-3.7%
Annualized change 2006-2030	0.31%	-0.16%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	825	10.0
2015	787	9.3
2020	749	8.6
2025	707	7.9
2030	663	7.3
Percent change 2006-2030	-23.3%	-31.3%
Annualized change 2006-2030	-1.10%	-1.55%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,721	44.9
2015	3,681	43.3
2020	3,550	40.7
2025	3,404	38.2
2030	3,275	36.1
Percent change 2006-2030	-13.0%	-22.2%
Annualized change 2006-2030	-0.58%	-1.04%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,821	22.0
2015	1,844	21.7
2020	1,923	22.1
2025	1,971	22.1
2030	1,985	21.9
Percent change 2006-2030	13.2%	1.3%
Annualized change 2006-2030	0.52%	0.05%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,807	21.8
2015	1,908	22.4
2020	1,973	22.6
2025	2,020	22.7
2030	2,056	22.7
Percent change 2006-2030	21.8%	9.0%
Annualized change 2006-2030	0.82%	0.36%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,435	17.3
2015	1,632	19.2
2020	1,810	20.8
2025	1,966	22.1
2030	2,095	23.1
Percent change 2006-2030	61.0%	44.1%
Annualized change 2006-2030	2.00%	1.53%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,478	17.8
2015	1,558	18.3
2020	1,604	18.4
2025	1,650	18.5
2030	1,686	18.6
Percent change 2006-2030	20.1%	7.4%
Annualized change 2006-2030	0.76%	0.30%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	983	11.9
2015	952	11.2
2020	917	10.5
2025	873	9.8
2030	836	9.2
Percent change 2006-2030	-17.0%	-25.7%
Annualized change 2006-2030	-0.77%	-1.23%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	414	5.0
2015	420	4.9
2020	413	4.7
2025	410	4.6
2030	397	4.4
Percent change 2006-2030	-3.8%	-13.9%
Annualized change 2006-2030	-0.16%	-0.62%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	911	11.0
2015	938	11.0
2020	961	11.0
2025	978	11.0
2030	993	10.9
Percent change 2006-2030	13.0%	1.1%
Annualized change 2006-2030	0.51%	0.05%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	414	5.0
2015	399	4.7
2020	382	4.4
2025	368	4.1
2030	353	3.9
Percent change 2006-2030	-16.8%	-25.6%
Annualized change 2006-2030	-0.76%	-1.22%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	691	8.3
2015	680	8.0
2020	667	7.6
2025	646	7.2
2030	620	6.8
Percent change 2006-2030	-11.1%	-20.4%
Annualized change 2006-2030	-0.49%	-0.95%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,056	48.9
2015	4,164	48.9
2020	4,191	48.1
2025	4,180	46.9
2030	4,161	45.9
Percent change 2006-2030	6.2%	-4.9%
Annualized change 2006-2030	0.25%	-0.21%

New York City Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 461 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,438	499.9
2015	43,539	511.8
2020	45,073	516.8
2025	46,124	517.6
2030	46,957	517.5
Percent change 2006-2030	18.7%	6.2%
Annualized change 2006-2030	0.72%	0.25%

Figure 462 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,105	170.2	2010	27,332	329.7
2015	14,679	172.5	2015	28,860	339.2
2020	15,019	172.2	2020	30,054	344.6
2025	15,147	170.0	2025	30,977	347.6
2030	15,157	167.1	2030	31,800	350.5
Percent change 2006-2030	13.5%	1.6%	Percent change 2006-2030	21.4%	8.6%
Annualized change 2006-2030	0.53%	0.07%	Annualized change 2006-2030	0.81%	0.35%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 463– New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,105	170.2	2010	1,809	21.8
2015	14,679	172.5	2015	1,896	22.3
2020	15,019	172.2	2020	1,937	22.2
2025	15,147	170.0	2025	1,939	21.8
2030	15,157	167.1	2030	1,910	21.0
Percent change 2006-2030	13.5%	1.6%	Percent change 2006-2030	10.0%	-1.6%
Annualized change 2006-2030	0.53%	0.07%	Annualized change 2006-2030	0.40%	-0.07%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,914	107.5	2010	3,383	40.8
2015	9,236	108.6	2015	3,548	41.7
2020	9,416	108.0	2020	3,666	42.0
2025	9,458	106.1	2025	3,751	42.1
2030	9,405	103.7	2030	3,842	42.3
Percent change 2006-2030	11.7%	0.0%	Percent change 2006-2030	20.2%	7.6%
Annualized change 2006-2030	0.46%	0.00%	Annualized change 2006-2030	0.77%	0.30%

Non-Primary Care Specialties

Figure 464 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,231	14.9
2015	1,358	16.0
2020	1,471	16.9
2025	1,566	17.6
2030	1,664	18.3
Percent change 2006-2030	42.9%	27.9%
Annualized change 2006-2030	1.50%	1.03%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,290	63.8
2015	5,949	69.9
2020	6,559	75.2
2025	7,089	79.6
2030	7,599	83.8
Percent change 2006-2030	55.5%	39.1%
Annualized change 2006-2030	1.86%	1.39%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,106	25.4
2015	2,193	25.8
2020	2,248	25.8
2025	2,280	25.6
2030	2,296	25.3
Percent change 2006-2030	13.0%	1.1%
Annualized change 2006-2030	0.51%	0.05%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	832	10.0
2015	803	9.4
2020	775	8.9
2025	741	8.3
2030	704	7.8
Percent change 2006-2030	-18.5%	-27.1%
Annualized change 2006-2030	-0.85%	-1.31%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,744	45.2
2015	3,741	44.0
2020	3,641	41.8
2025	3,523	39.5
2030	3,422	37.7
Percent change 2006-2030	-9.1%	-18.7%
Annualized change 2006-2030	-0.40%	-0.86%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,835	22.1
2015	1,884	22.1
2020	1,989	22.8
2025	2,061	23.1
2030	2,105	23.2
Percent change 2006-2030	20.0%	7.4%
Annualized change 2006-2030	0.76%	0.30%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,823	22.0
2015	1,954	23.0
2020	2,044	23.4
2025	2,117	23.8
2030	2,185	24.1
Percent change 2006-2030	29.4%	15.8%
Annualized change 2006-2030	1.08%	0.61%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,450	17.5
2015	1,672	19.7
2020	1,878	21.5
2025	2,068	23.2
2030	2,233	24.6
Percent change 2006-2030	71.6%	53.6%
Annualized change 2006-2030	2.28%	1.80%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,490	18.0
2015	1,591	18.7
2020	1,660	19.0
2025	1,730	19.4
2030	1,791	19.7
Percent change 2006-2030	27.5%	14.1%
Annualized change 2006-2030	1.02%	0.55%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	990	11.9
2015	971	11.4
2020	946	10.8
2025	910	10.2
2030	882	9.7
Percent change 2006-2030	-12.4%	-21.6%
Annualized change 2006-2030	-0.55%	-1.01%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	418	5.0
2015	430	5.0
2020	428	4.9
2025	429	4.8
2030	422	4.6
Percent change 2006-2030	2.1%	-8.6%
Annualized change 2006-2030	0.09%	-0.38%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	919	11.1
2015	961	11.3
2020	997	11.4
2025	1,028	11.5
2030	1,060	11.7
Percent change 2006-2030	20.5%	7.9%
Annualized change 2006-2030	0.78%	0.32%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	419	5.1
2015	410	4.8
2020	398	4.6
2025	389	4.4
2030	380	4.2
Percent change 2006-2030	-10.6%	-20.0%
Annualized change 2006-2030	-0.47%	-0.93%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	698	8.4
2015	696	8.2
2020	693	7.9
2025	680	7.6
2030	662	7.3
Percent change 2006-2030	-5.0%	-15.0%
Annualized change 2006-2030	-0.21%	-0.67%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,086	49.3
2015	4,248	49.9
2020	4,327	49.6
2025	4,364	49.0
2030	4,398	48.5
Percent change 2006-2030	12.3%	0.5%
Annualized change 2006-2030	0.48%	0.02%

New York City Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 465 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,092	495.7
2015	42,652	501.3
2020	43,647	500.5
2025	44,181	495.8
2030	44,442	489.8
Percent change 2006-2030	12.4%	0.6%
Annualized change 2006-2030	0.49%	0.02%

Figure 466 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,967	168.5	2010	27,126	327.2
2015	14,338	168.5	2015	28,313	332.8
2020	14,498	166.2	2020	29,149	334.2
2025	14,466	162.3	2025	29,715	333.5
2030	14,302	157.6	2030	30,140	332.2
Percent change 2006-2030	7.1%	-4.1%	Percent change 2006-2030	15.1%	3.0%
Annualized change 2006-2030	0.29%	-0.18%	Annualized change 2006-2030	0.59%	0.12%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 467– New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,967	168.5	2010	1,786	21.5
2015	14,338	168.5	2015	1,835	21.6
2020	14,498	166.2	2020	1,841	21.1
2025	14,466	162.3	2025	1,809	20.3
2030	14,302	157.6	2030	1,748	19.3
Percent change 2006-2030	7.1%	-4.1%	Percent change 2006-2030	0.7%	-9.9%
Annualized change 2006-2030	0.29%	-0.18%	Annualized change 2006-2030	0.03%	-0.43%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,857	106.8	2010	3,324	40.1
2015	9,065	106.6	2015	3,438	40.4
2020	9,133	104.7	2020	3,524	40.4
2025	9,073	101.8	2025	3,584	40.2
2030	8,919	98.3	2030	3,635	40.1
Percent change 2006-2030	5.9%	-5.2%	Percent change 2006-2030	13.7%	1.8%
Annualized change 2006-2030	0.24%	-0.22%	Annualized change 2006-2030	0.54%	0.07%

Non-Primary Care Specialties

Figure 468 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,221	14.7
2015	1,329	15.6
2020	1,420	16.3
2025	1,493	16.8
2030	1,566	17.3
Percent change 2006-2030	34.5%	20.4%
Annualized change 2006-2030	1.24%	0.77%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,252	63.4
2015	5,840	68.6
2020	6,363	73.0
2025	6,804	76.4
2030	7,207	79.4
Percent change 2006-2030	47.5%	32.0%
Annualized change 2006-2030	1.63%	1.16%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,095	25.3
2015	2,163	25.4
2020	2,196	25.2
2025	2,202	24.7
2030	2,193	24.2
Percent change 2006-2030	7.9%	-3.4%
Annualized change 2006-2030	0.32%	-0.15%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	825	10.0
2015	788	9.3
2020	750	8.6
2025	709	8.0
2030	665	7.3
Percent change 2006-2030	-23.0%	-31.1%
Annualized change 2006-2030	-1.09%	-1.54%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,721	44.9
2015	3,685	43.3
2020	3,556	40.8
2025	3,412	38.3
2030	3,284	36.2
Percent change 2006-2030	-12.8%	-21.9%
Annualized change 2006-2030	-0.57%	-1.03%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,821	22.0
2015	1,846	21.7
2020	1,926	22.1
2025	1,975	22.2
2030	1,991	21.9
Percent change 2006-2030	13.5%	1.6%
Annualized change 2006-2030	0.53%	0.07%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,807	21.8
2015	1,910	22.5
2020	1,976	22.7
2025	2,025	22.7
2030	2,062	22.7
Percent change 2006-2030	22.1%	9.3%
Annualized change 2006-2030	0.84%	0.37%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,435	17.3
2015	1,633	19.2
2020	1,813	20.8
2025	1,971	22.1
2030	2,101	23.2
Percent change 2006-2030	61.5%	44.5%
Annualized change 2006-2030	2.02%	1.55%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,478	17.8
2015	1,559	18.3
2020	1,606	18.4
2025	1,654	18.6
2030	1,690	18.6
Percent change 2006-2030	20.4%	7.7%
Annualized change 2006-2030	0.78%	0.31%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	983	11.9
2015	953	11.2
2020	919	10.5
2025	875	9.8
2030	838	9.2
Percent change 2006-2030	-16.7%	-25.5%
Annualized change 2006-2030	-0.76%	-1.22%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	414	5.0
2015	420	4.9
2020	414	4.7
2025	411	4.6
2030	398	4.4
Percent change 2006-2030	-3.5%	-13.7%
Annualized change 2006-2030	-0.15%	-0.61%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	911	11.0
2015	939	11.0
2020	963	11.0
2025	980	11.0
2030	996	11.0
Percent change 2006-2030	13.3%	1.4%
Annualized change 2006-2030	0.52%	0.06%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	414	5.0
2015	399	4.7
2020	382	4.4
2025	369	4.1
2030	355	3.9
Percent change 2006-2030	-16.6%	-25.4%
Annualized change 2006-2030	-0.75%	-1.21%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	691	8.3
2015	680	8.0
2020	668	7.7
2025	647	7.3
2030	622	6.9
Percent change 2006-2030	-10.8%	-20.2%
Annualized change 2006-2030	-0.48%	-0.94%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,056	48.9
2015	4,168	49.0
2020	4,198	48.1
2025	4,190	47.0
2030	4,173	46.0
Percent change 2006-2030	6.5%	-4.7%
Annualized change 2006-2030	0.26%	-0.20%

New York City Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 469 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,438	499.9
2015	43,539	511.8
2020	45,073	516.8
2025	46,124	517.6
2030	46,957	517.5
Percent change 2006-2030	18.7%	6.2%
Annualized change 2006-2030	0.72%	0.25%

Figure 470 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,101	170.1	2010	27,337	329.8
2015	14,652	172.2	2015	28,888	339.5
2020	14,968	171.6	2020	30,105	345.2
2025	15,074	169.2	2025	31,050	348.5
2030	15,065	166.0	2030	31,892	351.5
Percent change 2006-2030	12.8%	1.0%	Percent change 2006-2030	21.7%	8.9%
Annualized change 2006-2030	0.50%	0.04%	Annualized change 2006-2030	0.82%	0.36%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 471– New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,101	170.1	2010	1,808	21.8
2015	14,652	172.2	2015	1,892	22.2
2020	14,968	171.6	2020	1,931	22.1
2025	15,074	169.2	2025	1,929	21.6
2030	15,065	166.0	2030	1,898	20.9
Percent change 2006-2030	12.8%	1.0%	Percent change 2006-2030	9.3%	-2.2%
Annualized change 2006-2030	0.50%	0.04%	Annualized change 2006-2030	0.37%	-0.09%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,911	107.5	2010	3,382	40.8
2015	9,218	108.4	2015	3,541	41.6
2020	9,384	107.6	2020	3,653	41.9
2025	9,412	105.6	2025	3,733	41.9
2030	9,348	103.0	2030	3,819	42.1
Percent change 2006-2030	11.0%	-0.6%	Percent change 2006-2030	19.5%	6.9%
Annualized change 2006-2030	0.44%	-0.03%	Annualized change 2006-2030	0.74%	0.28%

Non-Primary Care Specialties

Figure 472 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,231	14.9
2015	1,359	16.0
2020	1,474	16.9
2025	1,569	17.6
2030	1,669	18.4
Percent change 2006-2030	43.3%	28.3%
Annualized change 2006-2030	1.51%	1.04%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,291	63.8
2015	5,955	70.0
2020	6,570	75.3
2025	7,105	79.7
2030	7,621	84.0
Percent change 2006-2030	55.9%	39.5%
Annualized change 2006-2030	1.87%	1.40%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,106	25.4
2015	2,195	25.8
2020	2,252	25.8
2025	2,286	25.7
2030	2,302	25.4
Percent change 2006-2030	13.3%	1.4%
Annualized change 2006-2030	0.52%	0.06%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	832	10.0
2015	804	9.4
2020	776	8.9
2025	743	8.3
2030	706	7.8
Percent change 2006-2030	-18.3%	-26.9%
Annualized change 2006-2030	-0.84%	-1.30%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,745	45.2
2015	3,744	44.0
2020	3,647	41.8
2025	3,531	39.6
2030	3,432	37.8
Percent change 2006-2030	-8.9%	-18.4%
Annualized change 2006-2030	-0.39%	-0.85%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,835	22.1
2015	1,886	22.2
2020	1,992	22.8
2025	2,066	23.2
2030	2,111	23.3
Percent change 2006-2030	20.4%	7.7%
Annualized change 2006-2030	0.78%	0.31%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,823	22.0
2015	1,956	23.0
2020	2,048	23.5
2025	2,122	23.8
2030	2,191	24.1
Percent change 2006-2030	29.8%	16.1%
Annualized change 2006-2030	1.09%	0.63%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,451	17.5
2015	1,674	19.7
2020	1,881	21.6
2025	2,073	23.3
2030	2,239	24.7
Percent change 2006-2030	72.1%	54.0%
Annualized change 2006-2030	2.29%	1.82%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,491	18.0
2015	1,593	18.7
2020	1,663	19.1
2025	1,734	19.5
2030	1,796	19.8
Percent change 2006-2030	27.9%	14.5%
Annualized change 2006-2030	1.03%	0.56%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	990	11.9
2015	972	11.4
2020	947	10.9
2025	912	10.2
2030	884	9.7
Percent change 2006-2030	-12.2%	-21.4%
Annualized change 2006-2030	-0.54%	-1.00%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	418	5.0
2015	430	5.1
2020	429	4.9
2025	430	4.8
2030	423	4.7
Percent change 2006-2030	2.4%	-8.4%
Annualized change 2006-2030	0.10%	-0.36%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	919	11.1
2015	962	11.3
2020	999	11.5
2025	1,031	11.6
2030	1,063	11.7
Percent change 2006-2030	20.9%	8.2%
Annualized change 2006-2030	0.79%	0.33%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	419	5.1
2015	410	4.8
2020	399	4.6
2025	390	4.4
2030	381	4.2
Percent change 2006-2030	-10.4%	-19.8%
Annualized change 2006-2030	-0.46%	-0.92%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	698	8.4
2015	696	8.2
2020	694	8.0
2025	682	7.7
2030	664	7.3
Percent change 2006-2030	-4.7%	-14.7%
Annualized change 2006-2030	-0.20%	-0.66%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,087	49.3
2015	4,252	50.0
2020	4,334	49.7
2025	4,375	49.1
2030	4,411	48.6
Percent change 2006-2030	12.6%	0.8%
Annualized change 2006-2030	0.50%	0.03%

New York City Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 473 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,092	495.7
2015	42,652	501.3
2020	43,647	500.5
2025	44,181	495.8
2030	44,442	489.8
Percent change 2006-2030	12.4%	0.6%
Annualized change 2006-2030	0.49%	0.02%

Figure 474 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,964	168.5	2010	27,128	327.3
2015	14,323	168.3	2015	28,329	333.0
2020	14,469	165.9	2020	29,178	334.6
2025	14,424	161.9	2025	29,757	333.9
2030	14,249	157.1	2030	30,193	332.8
Percent change 2006-2030	6.7%	-4.5%	Percent change 2006-2030	15.3%	3.1%
Annualized change 2006-2030	0.27%	-0.19%	Annualized change 2006-2030	0.59%	0.13%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 475 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,964	168.5	2010	1,786	21.5
2015	14,323	168.3	2015	1,833	21.5
2020	14,469	165.9	2020	1,837	21.1
2025	14,424	161.9	2025	1,804	20.2
2030	14,249	157.1	2030	1,741	19.2
Percent change 2006-2030	6.7%	-4.5%	Percent change 2006-2030	0.3%	-10.2%
Annualized change 2006-2030	0.27%	-0.19%	Annualized change 2006-2030	0.01%	-0.45%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,855	106.8	2010	3,323	40.1
2015	9,055	106.4	2015	3,434	40.4
2020	9,115	104.5	2020	3,517	40.3
2025	9,046	101.5	2025	3,574	40.1
2030	8,887	97.9	2030	3,621	39.9
Percent change 2006-2030	5.5%	-5.6%	Percent change 2006-2030	13.3%	1.4%
Annualized change 2006-2030	0.23%	-0.24%	Annualized change 2006-2030	0.52%	0.06%

Non-Primary Care Specialties

Figure 476 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,221	14.7
2015	1,330	15.6
2020	1,421	16.3
2025	1,495	16.8
2030	1,568	17.3
Percent change 2006-2030	34.7%	20.6%
Annualized change 2006-2030	1.25%	0.78%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,252	63.4
2015	5,843	68.7
2020	6,369	73.0
2025	6,814	76.5
2030	7,219	79.6
Percent change 2006-2030	47.7%	32.2%
Annualized change 2006-2030	1.64%	1.17%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,095	25.3
2015	2,164	25.4
2020	2,198	25.2
2025	2,205	24.7
2030	2,196	24.2
Percent change 2006-2030	8.1%	-3.3%
Annualized change 2006-2030	0.32%	-0.14%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	825	10.0
2015	789	9.3
2020	751	8.6
2025	710	8.0
2030	666	7.3
Percent change 2006-2030	-22.9%	-31.0%
Annualized change 2006-2030	-1.08%	-1.53%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,722	44.9
2015	3,687	43.3
2020	3,560	40.8
2025	3,417	38.3
2030	3,290	36.3
Percent change 2006-2030	-12.6%	-21.8%
Annualized change 2006-2030	-0.56%	-1.02%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,821	22.0
2015	1,847	21.7
2020	1,928	22.1
2025	1,978	22.2
2030	1,995	22.0
Percent change 2006-2030	13.7%	1.8%
Annualized change 2006-2030	0.54%	0.07%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,807	21.8
2015	1,911	22.5
2020	1,978	22.7
2025	2,027	22.8
2030	2,065	22.8
Percent change 2006-2030	22.4%	9.5%
Annualized change 2006-2030	0.84%	0.38%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,435	17.3
2015	1,634	19.2
2020	1,815	20.8
2025	1,974	22.1
2030	2,104	23.2
Percent change 2006-2030	61.7%	44.7%
Annualized change 2006-2030	2.02%	1.55%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,478	17.8
2015	1,560	18.3
2020	1,608	18.4
2025	1,656	18.6
2030	1,693	18.7
Percent change 2006-2030	20.6%	7.9%
Annualized change 2006-2030	0.78%	0.32%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	983	11.9
2015	953	11.2
2020	919	10.5
2025	876	9.8
2030	840	9.3
Percent change 2006-2030	-16.6%	-25.4%
Annualized change 2006-2030	-0.75%	-1.21%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	414	5.0
2015	420	4.9
2020	414	4.8
2025	412	4.6
2030	399	4.4
Percent change 2006-2030	-3.3%	-13.5%
Annualized change 2006-2030	-0.14%	-0.60%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	911	11.0
2015	940	11.0
2020	964	11.1
2025	982	11.0
2030	998	11.0
Percent change 2006-2030	13.5%	1.6%
Annualized change 2006-2030	0.53%	0.07%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	414	5.0
2015	400	4.7
2020	383	4.4
2025	369	4.1
2030	355	3.9
Percent change 2006-2030	-16.4%	-25.2%
Annualized change 2006-2030	-0.75%	-1.20%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	691	8.3
2015	681	8.0
2020	669	7.7
2025	648	7.3
2030	623	6.9
Percent change 2006-2030	-10.7%	-20.0%
Annualized change 2006-2030	-0.47%	-0.93%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,057	48.9
2015	4,170	49.0
2020	4,202	48.2
2025	4,195	47.1
2030	4,180	46.1
Percent change 2006-2030	6.7%	-4.5%
Annualized change 2006-2030	0.27%	-0.19%

New York City Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 477 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,438	499.9
2015	43,539	511.8
2020	45,073	516.8
2025	46,124	517.6
2030	46,957	517.5
Percent change 2006-2030	18.7%	6.2%
Annualized change 2006-2030	0.72%	0.25%

Figure 478 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,098	170.1	2010	27,339	329.8
2015	14,635	172.0	2015	28,904	339.7
2020	14,938	171.3	2020	30,135	345.5
2025	15,030	168.7	2025	31,094	349.0
2030	15,010	165.4	2030	31,947	352.1
Percent change 2006-2030	12.4%	0.6%	Percent change 2006-2030	22.0%	9.1%
Annualized change 2006-2030	0.49%	0.02%	Annualized change 2006-2030	0.83%	0.36%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 479 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,098	170.1	2010	1,808	21.8
2015	14,635	172.0	2015	1,890	22.2
2020	14,938	171.3	2020	1,927	22.1
2025	15,030	168.7	2025	1,923	21.6
2030	15,010	165.4	2030	1,891	20.8
Percent change 2006-2030	12.4%	0.6%	Percent change 2006-2030	8.9%	-2.5%
Annualized change 2006-2030	0.49%	0.02%	Annualized change 2006-2030	0.36%	-0.11%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,909	107.5	2010	3,381	40.8
2015	9,208	108.2	2015	3,537	41.6
2020	9,365	107.4	2020	3,646	41.8
2025	9,384	105.3	2025	3,722	41.8
2030	9,314	102.7	2030	3,805	41.9
Percent change 2006-2030	10.6%	-1.0%	Percent change 2006-2030	19.0%	6.5%
Annualized change 2006-2030	0.42%	-0.04%	Annualized change 2006-2030	0.73%	0.26%

Non-Primary Care Specialties

Figure 480 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,231	14.9
2015	1,360	16.0
2020	1,475	16.9
2025	1,572	17.6
2030	1,671	18.4
Percent change 2006-2030	43.6%	28.5%
Annualized change 2006-2030	1.52%	1.05%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,292	63.8
2015	5,958	70.0
2020	6,577	75.4
2025	7,116	79.9
2030	7,634	84.1
Percent change 2006-2030	56.2%	39.8%
Annualized change 2006-2030	1.88%	1.41%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,106	25.4
2015	2,196	25.8
2020	2,254	25.8
2025	2,289	25.7
2030	2,306	25.4
Percent change 2006-2030	13.5%	1.6%
Annualized change 2006-2030	0.53%	0.06%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	832	10.0
2015	804	9.5
2020	777	8.9
2025	744	8.4
2030	707	7.8
Percent change 2006-2030	-18.2%	-26.8%
Annualized change 2006-2030	-0.83%	-1.29%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,745	45.2
2015	3,746	44.0
2020	3,651	41.9
2025	3,537	39.7
2030	3,438	37.9
Percent change 2006-2030	-8.7%	-18.3%
Annualized change 2006-2030	-0.38%	-0.84%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,835	22.1
2015	1,887	22.2
2020	1,994	22.9
2025	2,069	23.2
2030	2,115	23.3
Percent change 2006-2030	20.6%	7.9%
Annualized change 2006-2030	0.78%	0.32%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,823	22.0
2015	1,957	23.0
2020	2,050	23.5
2025	2,125	23.8
2030	2,195	24.2
Percent change 2006-2030	30.0%	16.4%
Annualized change 2006-2030	1.10%	0.63%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,451	17.5
2015	1,675	19.7
2020	1,883	21.6
2025	2,076	23.3
2030	2,243	24.7
Percent change 2006-2030	72.4%	54.3%
Annualized change 2006-2030	2.30%	1.82%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,491	18.0
2015	1,594	18.7
2020	1,665	19.1
2025	1,736	19.5
2030	1,799	19.8
Percent change 2006-2030	28.1%	14.6%
Annualized change 2006-2030	1.04%	0.57%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	990	11.9
2015	972	11.4
2020	948	10.9
2025	913	10.2
2030	886	9.8
Percent change 2006-2030	-12.0%	-21.3%
Annualized change 2006-2030	-0.53%	-0.99%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	418	5.0
2015	430	5.1
2020	429	4.9
2025	431	4.8
2030	424	4.7
Percent change 2006-2030	2.6%	-8.2%
Annualized change 2006-2030	0.11%	-0.36%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	919	11.1
2015	962	11.3
2020	1,000	11.5
2025	1,032	11.6
2030	1,064	11.7
Percent change 2006-2030	21.1%	8.4%
Annualized change 2006-2030	0.80%	0.34%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	419	5.1
2015	410	4.8
2020	399	4.6
2025	391	4.4
2030	382	4.2
Percent change 2006-2030	-10.2%	-19.7%
Annualized change 2006-2030	-0.45%	-0.91%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	698	8.4
2015	697	8.2
2020	695	8.0
2025	683	7.7
2030	665	7.3
Percent change 2006-2030	-4.5%	-14.6%
Annualized change 2006-2030	-0.19%	-0.65%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,087	49.3
2015	4,255	50.0
2020	4,338	49.7
2025	4,381	49.2
2030	4,418	48.7
Percent change 2006-2030	12.8%	0.9%
Annualized change 2006-2030	0.50%	0.04%

New York City Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 481 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	40,988	494.5
2015	42,023	493.9
2020	42,495	487.3
2025	42,505	477.0
2030	42,346	466.7
Percent change 2006-2030	7.1%	-4.2%
Annualized change 2006-2030	0.29%	-0.18%

Figure 482 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,936	168.1	2010	27,052	326.3
2015	14,155	166.4	2015	27,868	327.6
2020	14,162	162.4	2020	28,333	324.9
2025	13,977	156.9	2025	28,528	320.1
2030	13,691	150.9	2030	28,655	315.8
Percent change 2006-2030	2.5%	-8.2%	Percent change 2006-2030	9.4%	-2.1%
Annualized change 2006-2030	0.10%	-0.36%	Annualized change 2006-2030	0.37%	-0.09%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 483 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,936	168.1	2010	1,782	21.5
2015	14,155	166.4	2015	1,812	21.3
2020	14,162	162.4	2020	1,798	20.6
2025	13,977	156.9	2025	1,748	19.6
2030	13,691	150.9	2030	1,673	18.4
Percent change 2006-2030	2.5%	-8.2%	Percent change 2006-2030	-3.6%	-13.8%
Annualized change 2006-2030	0.10%	-0.36%	Annualized change 2006-2030	-0.15%	-0.62%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,837	106.6	2010	3,317	40.0
2015	8,949	105.2	2015	3,394	39.9
2020	8,921	102.3	2020	3,443	39.5
2025	8,766	98.4	2025	3,463	38.9
2030	8,538	94.1	2030	3,480	38.4
Percent change 2006-2030	1.4%	-9.3%	Percent change 2006-2030	8.9%	-2.6%
Annualized change 2006-2030	0.06%	-0.40%	Annualized change 2006-2030	0.35%	-0.11%

Non-Primary Care Specialties

Figure 484 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,218	14.7
2015	1,308	15.4
2020	1,380	15.8
2025	1,433	16.1
2030	1,488	16.4
Percent change 2006-2030	27.9%	14.4%
Annualized change 2006-2030	1.03%	0.56%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,238	63.2
2015	5,748	67.6
2020	6,185	70.9
2025	6,532	73.3
2030	6,852	75.5
Percent change 2006-2030	40.2%	25.5%
Annualized change 2006-2030	1.42%	0.95%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,089	25.2
2015	2,129	25.0
2020	2,134	24.5
2025	2,114	23.7
2030	2,085	23.0
Percent change 2006-2030	2.6%	-8.2%
Annualized change 2006-2030	0.11%	-0.36%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	823	9.9
2015	776	9.1
2020	729	8.4
2025	681	7.6
2030	632	7.0
Percent change 2006-2030	-26.8%	-34.5%
Annualized change 2006-2030	-1.29%	-1.75%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,711	44.8
2015	3,627	42.6
2020	3,456	39.6
2025	3,275	36.8
2030	3,122	34.4
Percent change 2006-2030	-17.1%	-25.8%
Annualized change 2006-2030	-0.78%	-1.23%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,816	21.9
2015	1,817	21.4
2020	1,872	21.5
2025	1,896	21.3
2030	1,893	20.9
Percent change 2006-2030	7.9%	-3.4%
Annualized change 2006-2030	0.32%	-0.14%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,802	21.7
2015	1,880	22.1
2020	1,920	22.0
2025	1,944	21.8
2030	1,960	21.6
Percent change 2006-2030	16.1%	3.9%
Annualized change 2006-2030	0.62%	0.16%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,431	17.3
2015	1,608	18.9
2020	1,762	20.2
2025	1,892	21.2
2030	1,997	22.0
Percent change 2006-2030	53.5%	37.4%
Annualized change 2006-2030	1.80%	1.33%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,474	17.8
2015	1,535	18.0
2020	1,561	17.9
2025	1,587	17.8
2030	1,607	17.7
Percent change 2006-2030	14.5%	2.4%
Annualized change 2006-2030	0.56%	0.10%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	980	11.8
2015	938	11.0
2020	893	10.2
2025	840	9.4
2030	797	8.8
Percent change 2006-2030	-20.8%	-29.2%
Annualized change 2006-2030	-0.97%	-1.43%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	413	5.0
2015	413	4.9
2020	402	4.6
2025	395	4.4
2030	379	4.2
Percent change 2006-2030	-8.3%	-17.9%
Annualized change 2006-2030	-0.36%	-0.82%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	909	11.0
2015	924	10.9
2020	936	10.7
2025	941	10.6
2030	947	10.4
Percent change 2006-2030	7.8%	-3.6%
Annualized change 2006-2030	0.31%	-0.15%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	413	5.0
2015	393	4.6
2020	372	4.3
2025	354	4.0
2030	337	3.7
Percent change 2006-2030	-20.7%	-29.0%
Annualized change 2006-2030	-0.96%	-1.42%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	689	8.3
2015	670	7.9
2020	649	7.4
2025	621	7.0
2030	591	6.5
Percent change 2006-2030	-15.2%	-24.1%
Annualized change 2006-2030	-0.68%	-1.14%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,045	48.8
2015	4,102	48.2
2020	4,080	46.8
2025	4,022	45.1
2030	3,967	43.7
Percent change 2006-2030	1.3%	-9.4%
Annualized change 2006-2030	0.05%	-0.41%

New York City Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 485 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,327	498.5
2015	42,876	504.0
2020	43,857	502.9
2025	44,355	497.8
2030	44,746	493.2
Percent change 2006-2030	13.1%	1.2%
Annualized change 2006-2030	0.52%	0.05%

Figure 486 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,069	169.7	2010	27,258	328.8
2015	14,458	169.9	2015	28,418	334.0
2020	14,614	167.6	2020	29,243	335.3
2025	14,558	163.4	2025	29,797	334.4
2030	14,421	158.9	2030	30,325	334.2
Percent change 2006-2030	8.0%	-3.4%	Percent change 2006-2030	15.8%	3.6%
Annualized change 2006-2030	0.32%	-0.14%	Annualized change 2006-2030	0.61%	0.15%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 487 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,069	169.7	2010	1,804	21.8
2015	14,458	169.9	2015	1,867	21.9
2020	14,614	167.6	2020	1,885	21.6
2025	14,558	163.4	2025	1,863	20.9
2030	14,421	158.9	2030	1,817	20.0
Percent change 2006-2030	8.0%	-3.4%	Percent change 2006-2030	4.7%	-6.3%
Annualized change 2006-2030	0.32%	-0.14%	Annualized change 2006-2030	0.19%	-0.27%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,890	107.2	2010	3,374	40.7
2015	9,097	106.9	2015	3,495	41.1
2020	9,161	105.0	2020	3,568	40.9
2025	9,090	102.0	2025	3,605	40.5
2030	8,948	98.6	2030	3,655	40.3
Percent change 2006-2030	6.3%	-4.9%	Percent change 2006-2030	14.4%	2.3%
Annualized change 2006-2030	0.25%	-0.21%	Annualized change 2006-2030	0.56%	0.10%

Non-Primary Care Specialties

Figure 488 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,228	14.8
2015	1,337	15.7
2020	1,431	16.4
2025	1,506	16.9
2030	1,587	17.5
Percent change 2006-2030	36.3%	22.0%
Annualized change 2006-2030	1.30%	0.83%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,276	63.6
2015	5,858	68.9
2020	6,382	73.2
2025	6,819	76.5
2030	7,247	79.9
Percent change 2006-2030	48.3%	32.7%
Annualized change 2006-2030	1.66%	1.19%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,100	25.3
2015	2,159	25.4
2020	2,187	25.1
2025	2,194	24.6
2030	2,189	24.1
Percent change 2006-2030	7.7%	-3.6%
Annualized change 2006-2030	0.31%	-0.15%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	830	10.0
2015	791	9.3
2020	754	8.6
2025	713	8.0
2030	671	7.4
Percent change 2006-2030	-22.3%	-30.5%
Annualized change 2006-2030	-1.05%	-1.50%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,734	45.0
2015	3,683	43.3
2020	3,543	40.6
2025	3,389	38.0
2030	3,263	36.0
Percent change 2006-2030	-13.3%	-22.4%
Annualized change 2006-2030	-0.59%	-1.05%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,830	22.1
2015	1,855	21.8
2020	1,935	22.2
2025	1,983	22.3
2030	2,008	22.1
Percent change 2006-2030	14.5%	2.4%
Annualized change 2006-2030	0.56%	0.10%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,818	21.9
2015	1,924	22.6
2020	1,989	22.8
2025	2,036	22.9
2030	2,083	23.0
Percent change 2006-2030	23.4%	10.4%
Annualized change 2006-2030	0.88%	0.41%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,447	17.5
2015	1,647	19.4
2020	1,827	21.0
2025	1,990	22.3
2030	2,129	23.5
Percent change 2006-2030	63.7%	46.5%
Annualized change 2006-2030	2.07%	1.60%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,486	17.9
2015	1,567	18.4
2020	1,615	18.5
2025	1,664	18.7
2030	1,707	18.8
Percent change 2006-2030	21.6%	8.8%
Annualized change 2006-2030	0.82%	0.35%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	987	11.9
2015	956	11.2
2020	920	10.6
2025	875	9.8
2030	841	9.3
Percent change 2006-2030	-16.5%	-25.3%
Annualized change 2006-2030	-0.75%	-1.21%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	417	5.0
2015	423	5.0
2020	417	4.8
2025	413	4.6
2030	402	4.4
Percent change 2006-2030	-2.6%	-12.9%
Annualized change 2006-2030	-0.11%	-0.57%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	916	11.1
2015	946	11.1
2020	971	11.1
2025	989	11.1
2030	1,010	11.1
Percent change 2006-2030	15.0%	2.9%
Annualized change 2006-2030	0.58%	0.12%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	418	5.0
2015	404	4.7
2020	387	4.4
2025	375	4.2
2030	362	4.0
Percent change 2006-2030	-14.8%	-23.7%
Annualized change 2006-2030	-0.66%	-1.12%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	696	8.4
2015	685	8.1
2020	674	7.7
2025	654	7.3
2030	632	7.0
Percent change 2006-2030	-9.4%	-18.9%
Annualized change 2006-2030	-0.41%	-0.87%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,075	49.2
2015	4,183	49.2
2020	4,210	48.3
2025	4,198	47.1
2030	4,194	46.2
Percent change 2006-2030	7.1%	-4.2%
Annualized change 2006-2030	0.28%	-0.18%

New York City Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 489 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	40,988	494.5
2015	42,023	493.9
2020	42,495	487.3
2025	42,505	477.0
2030	42,346	466.7
Percent change 2006-2030	7.1%	-4.2%
Annualized change 2006-2030	0.29%	-0.18%

Figure 490 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,940	168.2	2010	27,047	326.3
2015	14,181	166.7	2015	27,842	327.3
2020	14,210	162.9	2020	28,285	324.3
2025	14,047	157.6	2025	28,458	319.4
2030	13,778	151.9	2030	28,569	314.9
Percent change 2006-2030	3.2%	-7.7%	Percent change 2006-2030	9.1%	-2.4%
Annualized change 2006-2030	0.13%	-0.33%	Annualized change 2006-2030	0.36%	-0.10%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 491 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,940	168.2	2010	1,783	21.5
2015	14,181	166.7	2015	1,815	21.3
2020	14,210	162.9	2020	1,804	20.7
2025	14,047	157.6	2025	1,757	19.7
2030	13,778	151.9	2030	1,684	18.6
Percent change 2006-2030	3.2%	-7.7%	Percent change 2006-2030	-3.0%	-13.2%
Annualized change 2006-2030	0.13%	-0.33%	Annualized change 2006-2030	-0.13%	-0.59%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,840	106.6	2010	3,318	40.0
2015	8,966	105.4	2015	3,400	40.0
2020	8,951	102.6	2020	3,455	39.6
2025	8,810	98.9	2025	3,480	39.1
2030	8,593	94.7	2030	3,502	38.6
Percent change 2006-2030	2.1%	-8.7%	Percent change 2006-2030	9.6%	-2.0%
Annualized change 2006-2030	0.08%	-0.38%	Annualized change 2006-2030	0.38%	-0.08%

Non-Primary Care Specialties

Figure 492 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,218	14.7
2015	1,307	15.4
2020	1,378	15.8
2025	1,430	16.0
2030	1,484	16.4
Percent change 2006-2030	27.5%	14.1%
Annualized change 2006-2030	1.02%	0.55%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,237	63.2
2015	5,742	67.5
2020	6,174	70.8
2025	6,516	73.1
2030	6,831	75.3
Percent change 2006-2030	39.8%	25.1%
Annualized change 2006-2030	1.41%	0.94%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,088	25.2
2015	2,127	25.0
2020	2,130	24.4
2025	2,109	23.7
2030	2,078	22.9
Percent change 2006-2030	2.3%	-8.5%
Annualized change 2006-2030	0.09%	-0.37%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	823	9.9
2015	775	9.1
2020	728	8.3
2025	679	7.6
2030	630	6.9
Percent change 2006-2030	-27.1%	-34.7%
Annualized change 2006-2030	-1.31%	-1.76%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,711	44.8
2015	3,623	42.6
2020	3,451	39.6
2025	3,267	36.7
2030	3,113	34.3
Percent change 2006-2030	-17.3%	-26.0%
Annualized change 2006-2030	-0.79%	-1.25%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,816	21.9
2015	1,815	21.3
2020	1,869	21.4
2025	1,892	21.2
2030	1,887	20.8
Percent change 2006-2030	7.6%	-3.7%
Annualized change 2006-2030	0.31%	-0.16%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,802	21.7
2015	1,878	22.1
2020	1,917	22.0
2025	1,939	21.8
2030	1,954	21.5
Percent change 2006-2030	15.8%	3.6%
Annualized change 2006-2030	0.61%	0.15%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,431	17.3
2015	1,606	18.9
2020	1,759	20.2
2025	1,888	21.2
2030	1,991	21.9
Percent change 2006-2030	53.0%	37.0%
Annualized change 2006-2030	1.79%	1.32%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,473	17.8
2015	1,533	18.0
2020	1,559	17.9
2025	1,584	17.8
2030	1,602	17.7
Percent change 2006-2030	14.1%	2.1%
Annualized change 2006-2030	0.55%	0.09%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	980	11.8
2015	937	11.0
2020	891	10.2
2025	838	9.4
2030	795	8.8
Percent change 2006-2030	-21.1%	-29.4%
Annualized change 2006-2030	-0.98%	-1.44%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	413	5.0
2015	413	4.9
2020	402	4.6
2025	394	4.4
2030	378	4.2
Percent change 2006-2030	-8.5%	-18.2%
Annualized change 2006-2030	-0.37%	-0.83%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	909	11.0
2015	923	10.9
2020	934	10.7
2025	939	10.5
2030	944	10.4
Percent change 2006-2030	7.4%	-3.9%
Annualized change 2006-2030	0.30%	-0.16%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	413	5.0
2015	393	4.6
2020	371	4.3
2025	353	4.0
2030	336	3.7
Percent change 2006-2030	-20.9%	-29.2%
Annualized change 2006-2030	-0.97%	-1.43%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	689	8.3
2015	669	7.9
2020	648	7.4
2025	620	7.0
2030	589	6.5
Percent change 2006-2030	-15.5%	-24.4%
Annualized change 2006-2030	-0.70%	-1.16%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,045	48.8
2015	4,099	48.2
2020	4,074	46.7
2025	4,012	45.0
2030	3,955	43.6
Percent change 2006-2030	1.0%	-9.6%
Annualized change 2006-2030	0.04%	-0.42%

New York City Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 493 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,327	498.5
2015	42,876	504.0
2020	43,857	502.9
2025	44,355	497.8
2030	44,746	493.2
Percent change 2006-2030	13.1%	1.2%
Annualized change 2006-2030	0.52%	0.05%

Figure 494 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,073	169.8	2010	27,254	328.8
2015	14,486	170.3	2015	28,390	333.7
2020	14,664	168.2	2020	29,192	334.7
2025	14,632	164.2	2025	29,723	333.6
2030	14,512	160.0	2030	30,234	333.2
Percent change 2006-2030	8.7%	-2.7%	Percent change 2006-2030	15.4%	3.3%
Annualized change 2006-2030	0.35%	-0.12%	Annualized change 2006-2030	0.60%	0.13%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 495 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,073	169.8	2010	1,805	21.8
2015	14,486	170.3	2015	1,871	22.0
2020	14,664	168.2	2020	1,892	21.7
2025	14,632	164.2	2025	1,873	21.0
2030	14,512	160.0	2030	1,829	20.2
Percent change 2006-2030	8.7%	-2.7%	Percent change 2006-2030	5.3%	-5.7%
Annualized change 2006-2030	0.35%	-0.12%	Annualized change 2006-2030	0.22%	-0.25%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,893	107.3	2010	3,375	40.7
2015	9,114	107.1	2015	3,501	41.2
2020	9,193	105.4	2020	3,580	41.0
2025	9,136	102.5	2025	3,623	40.7
2030	9,005	99.3	2030	3,678	40.5
Percent change 2006-2030	7.0%	-4.3%	Percent change 2006-2030	15.1%	3.0%
Annualized change 2006-2030	0.28%	-0.18%	Annualized change 2006-2030	0.59%	0.12%

Non-Primary Care Specialties

Figure 496 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,227	14.8
2015	1,336	15.7
2020	1,429	16.4
2025	1,502	16.9
2030	1,582	17.4
Percent change 2006-2030	35.9%	21.6%
Annualized change 2006-2030	1.29%	0.82%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,275	63.6
2015	5,852	68.8
2020	6,371	73.1
2025	6,802	76.3
2030	7,225	79.6
Percent change 2006-2030	47.8%	32.3%
Annualized change 2006-2030	1.64%	1.17%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,100	25.3
2015	2,157	25.4
2020	2,183	25.0
2025	2,188	24.6
2030	2,182	24.1
Percent change 2006-2030	7.4%	-3.9%
Annualized change 2006-2030	0.30%	-0.17%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	830	10.0
2015	790	9.3
2020	753	8.6
2025	711	8.0
2030	669	7.4
Percent change 2006-2030	-22.5%	-30.7%
Annualized change 2006-2030	-1.06%	-1.52%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,734	45.0
2015	3,680	43.3
2020	3,537	40.6
2025	3,381	37.9
2030	3,253	35.9
Percent change 2006-2030	-13.6%	-22.7%
Annualized change 2006-2030	-0.61%	-1.07%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,830	22.1
2015	1,853	21.8
2020	1,931	22.1
2025	1,978	22.2
2030	2,002	22.1
Percent change 2006-2030	14.1%	2.1%
Annualized change 2006-2030	0.55%	0.09%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,818	21.9
2015	1,922	22.6
2020	1,986	22.8
2025	2,031	22.8
2030	2,077	22.9
Percent change 2006-2030	23.0%	10.1%
Annualized change 2006-2030	0.87%	0.40%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,446	17.4
2015	1,645	19.3
2020	1,824	20.9
2025	1,985	22.3
2030	2,123	23.4
Percent change 2006-2030	63.2%	46.0%
Annualized change 2006-2030	2.06%	1.59%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,486	17.9
2015	1,565	18.4
2020	1,613	18.5
2025	1,660	18.6
2030	1,702	18.8
Percent change 2006-2030	21.2%	8.5%
Annualized change 2006-2030	0.81%	0.34%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	987	11.9
2015	955	11.2
2020	919	10.5
2025	873	9.8
2030	838	9.2
Percent change 2006-2030	-16.8%	-25.5%
Annualized change 2006-2030	-0.76%	-1.22%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	417	5.0
2015	423	5.0
2020	416	4.8
2025	412	4.6
2030	401	4.4
Percent change 2006-2030	-2.9%	-13.1%
Annualized change 2006-2030	-0.12%	-0.59%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	916	11.1
2015	945	11.1
2020	969	11.1
2025	987	11.1
2030	1,007	11.1
Percent change 2006-2030	14.6%	2.6%
Annualized change 2006-2030	0.57%	0.11%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	418	5.0
2015	403	4.7
2020	387	4.4
2025	374	4.2
2030	361	4.0
Percent change 2006-2030	-15.0%	-24.0%
Annualized change 2006-2030	-0.68%	-1.14%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	696	8.4
2015	684	8.0
2020	673	7.7
2025	653	7.3
2030	630	6.9
Percent change 2006-2030	-9.7%	-19.2%
Annualized change 2006-2030	-0.42%	-0.88%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,074	49.2
2015	4,179	49.1
2020	4,202	48.2
2025	4,188	47.0
2030	4,181	46.1
Percent change 2006-2030	6.7%	-4.5%
Annualized change 2006-2030	0.27%	-0.19%

New York City Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 497 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	40,988	494.5
2015	42,023	493.9
2020	42,495	487.3
2025	42,505	477.0
2030	42,346	466.7
Percent change 2006-2030	7.1%	-4.2%
Annualized change 2006-2030	0.29%	-0.18%

Figure 498 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,943	168.2	2010	27,045	326.3
2015	14,197	166.9	2015	27,826	327.1
2020	14,238	163.3	2020	28,256	324.0
2025	14,089	158.1	2025	28,416	318.9
2030	13,830	152.4	2030	28,516	314.3
Percent change 2006-2030	3.6%	-7.3%	Percent change 2006-2030	8.9%	-2.6%
Annualized change 2006-2030	0.15%	-0.32%	Annualized change 2006-2030	0.35%	-0.11%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 499 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,943	168.2	2010	1,783	21.5
2015	14,197	166.9	2015	1,817	21.4
2020	14,238	163.3	2020	1,807	20.7
2025	14,089	158.1	2025	1,762	19.8
2030	13,830	152.4	2030	1,690	18.6
Percent change 2006-2030	3.6%	-7.3%	Percent change 2006-2030	-2.7%	-12.9%
Annualized change 2006-2030	0.15%	-0.32%	Annualized change 2006-2030	-0.11%	-0.57%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,842	106.7	2010	3,318	40.0
2015	8,976	105.5	2015	3,404	40.0
2020	8,969	102.8	2020	3,462	39.7
2025	8,836	99.2	2025	3,491	39.2
2030	8,625	95.1	2030	3,515	38.7
Percent change 2006-2030	2.4%	-8.3%	Percent change 2006-2030	10.0%	-1.6%
Annualized change 2006-2030	0.10%	-0.36%	Annualized change 2006-2030	0.40%	-0.07%

Non-Primary Care Specialties

Figure 500 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,218	14.7
2015	1,306	15.4
2020	1,376	15.8
2025	1,428	16.0
2030	1,481	16.3
Percent change 2006-2030	27.2%	13.9%
Annualized change 2006-2030	1.01%	0.54%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,236	63.2
2015	5,739	67.5
2020	6,168	70.7
2025	6,506	73.0
2030	6,819	75.2
Percent change 2006-2030	39.5%	24.9%
Annualized change 2006-2030	1.40%	0.93%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,088	25.2
2015	2,126	25.0
2020	2,128	24.4
2025	2,106	23.6
2030	2,074	22.9
Percent change 2006-2030	2.1%	-8.6%
Annualized change 2006-2030	0.09%	-0.38%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	823	9.9
2015	775	9.1
2020	727	8.3
2025	678	7.6
2030	629	6.9
Percent change 2006-2030	-27.2%	-34.8%
Annualized change 2006-2030	-1.31%	-1.77%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,710	44.8
2015	3,621	42.6
2020	3,447	39.5
2025	3,263	36.6
2030	3,107	34.2
Percent change 2006-2030	-17.5%	-26.1%
Annualized change 2006-2030	-0.80%	-1.25%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,815	21.9
2015	1,814	21.3
2020	1,867	21.4
2025	1,889	21.2
2030	1,884	20.8
Percent change 2006-2030	7.4%	-3.9%
Annualized change 2006-2030	0.30%	-0.17%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,802	21.7
2015	1,877	22.1
2020	1,915	22.0
2025	1,936	21.7
2030	1,951	21.5
Percent change 2006-2030	15.6%	3.4%
Annualized change 2006-2030	0.60%	0.14%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,431	17.3
2015	1,605	18.9
2020	1,757	20.1
2025	1,885	21.2
2030	1,987	21.9
Percent change 2006-2030	52.8%	36.7%
Annualized change 2006-2030	1.78%	1.31%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,473	17.8
2015	1,532	18.0
2020	1,557	17.9
2025	1,581	17.7
2030	1,599	17.6
Percent change 2006-2030	13.9%	1.9%
Annualized change 2006-2030	0.54%	0.08%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	980	11.8
2015	936	11.0
2020	890	10.2
2025	837	9.4
2030	793	8.7
Percent change 2006-2030	-21.2%	-29.5%
Annualized change 2006-2030	-0.99%	-1.45%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	413	5.0
2015	413	4.9
2020	401	4.6
2025	393	4.4
2030	377	4.2
Percent change 2006-2030	-8.7%	-18.3%
Annualized change 2006-2030	-0.38%	-0.84%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	908	11.0
2015	923	10.8
2020	933	10.7
2025	937	10.5
2030	943	10.4
Percent change 2006-2030	7.2%	-4.0%
Annualized change 2006-2030	0.29%	-0.17%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	413	5.0
2015	392	4.6
2020	371	4.2
2025	353	4.0
2030	335	3.7
Percent change 2006-2030	-21.1%	-29.4%
Annualized change 2006-2030	-0.98%	-1.44%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	689	8.3
2015	669	7.9
2020	648	7.4
2025	619	6.9
2030	588	6.5
Percent change 2006-2030	-15.6%	-24.5%
Annualized change 2006-2030	-0.71%	-1.16%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,044	48.8
2015	4,096	48.1
2020	4,069	46.7
2025	4,006	45.0
2030	3,948	43.5
Percent change 2006-2030	0.8%	-9.8%
Annualized change 2006-2030	0.03%	-0.43%

New York City Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 501 – New York City Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	39,549	487.1
2010	41,327	498.5
2015	42,876	504.0
2020	43,857	502.9
2025	44,355	497.8
2030	44,746	493.2
Percent change 2006-2030	13.1%	1.2%
Annualized change 2006-2030	0.52%	0.05%

Figure 502 – New York City Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	14,076	169.8	2010	27,251	328.7
2015	14,502	170.5	2015	28,374	333.5
2020	14,695	168.5	2020	29,162	334.4
2025	14,676	164.7	2025	29,679	333.1
2030	14,568	160.6	2030	30,178	332.6
Percent change 2006-2030	9.1%	-2.4%	Percent change 2006-2030	15.2%	3.1%
Annualized change 2006-2030	0.36%	-0.10%	Annualized change 2006-2030	0.59%	0.13%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 503 – New York City Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	14,076	169.8	2010	1,805	21.8
2015	14,502	170.5	2015	1,873	22.0
2020	14,695	168.5	2020	1,895	21.7
2025	14,676	164.7	2025	1,878	21.1
2030	14,568	160.6	2030	1,835	20.2
Percent change 2006-2030	9.1%	-2.4%	Percent change 2006-2030	5.7%	-5.4%
Annualized change 2006-2030	0.36%	-0.10%	Annualized change 2006-2030	0.23%	-0.23%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,895	107.3	2010	3,376	40.7
2015	9,124	107.2	2015	3,505	41.2
2020	9,212	105.6	2020	3,587	41.1
2025	9,163	102.8	2025	3,634	40.8
2030	9,040	99.6	2030	3,692	40.7
Percent change 2006-2030	7.4%	-3.9%	Percent change 2006-2030	15.5%	3.4%
Annualized change 2006-2030	0.30%	-0.17%	Annualized change 2006-2030	0.60%	0.14%

Non-Primary Care Specialties

Figure 504 – New York City Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	1,164	14.3
2010	1,227	14.8
2015	1,335	15.7
2020	1,427	16.4
2025	1,500	16.8
2030	1,579	17.4
Percent change 2006-2030	35.6%	21.4%
Annualized change 2006-2030	1.28%	0.81%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	4,887	60.2
2010	5,275	63.6
2015	5,849	68.7
2020	6,364	73.0
2025	6,792	76.2
2030	7,211	79.5
Percent change 2006-2030	47.6%	32.1%
Annualized change 2006-2030	1.63%	1.17%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	2,032	25.0
2010	2,100	25.3
2015	2,156	25.3
2020	2,181	25.0
2025	2,185	24.5
2030	2,178	24.0
Percent change 2006-2030	7.2%	-4.1%
Annualized change 2006-2030	0.29%	-0.17%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	864	10.6
2010	830	10.0
2015	790	9.3
2020	752	8.6
2025	710	8.0
2030	668	7.4
Percent change 2006-2030	-22.7%	-30.8%
Annualized change 2006-2030	-1.07%	-1.52%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	3,765	46.4
2010	3,733	45.0
2015	3,677	43.2
2020	3,533	40.5
2025	3,376	37.9
2030	3,247	35.8
Percent change 2006-2030	-13.8%	-22.8%
Annualized change 2006-2030	-0.61%	-1.07%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,754	21.6
2010	1,830	22.1
2015	1,852	21.8
2020	1,929	22.1
2025	1,975	22.2
2030	1,998	22.0
Percent change 2006-2030	13.9%	1.9%
Annualized change 2006-2030	0.54%	0.08%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	1,688	20.8
2010	1,817	21.9
2015	1,921	22.6
2020	1,984	22.7
2025	2,028	22.8
2030	2,073	22.9
Percent change 2006-2030	22.8%	9.9%
Annualized change 2006-2030	0.86%	0.39%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	1,301	16.0
2010	1,446	17.4
2015	1,644	19.3
2020	1,822	20.9
2025	1,982	22.2
2030	2,119	23.4
Percent change 2006-2030	62.9%	45.8%
Annualized change 2006-2030	2.05%	1.58%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	1,404	17.3
2010	1,486	17.9
2015	1,565	18.4
2020	1,611	18.5
2025	1,657	18.6
2030	1,699	18.7
Percent change 2006-2030	21.0%	8.3%
Annualized change 2006-2030	0.80%	0.33%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	1,007	12.4
2010	987	11.9
2015	955	11.2
2020	918	10.5
2025	871	9.8
2030	837	9.2
Percent change 2006-2030	-16.9%	-25.6%
Annualized change 2006-2030	-0.77%	-1.23%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	413	5.1
2010	417	5.0
2015	422	5.0
2020	415	4.8
2025	411	4.6
2030	400	4.4
Percent change 2006-2030	-3.1%	-13.3%
Annualized change 2006-2030	-0.13%	-0.59%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	879	10.8
2010	916	11.1
2015	945	11.1
2020	968	11.1
2025	985	11.1
2030	1,006	11.1
Percent change 2006-2030	14.4%	2.4%
Annualized change 2006-2030	0.56%	0.10%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	425	5.2
2010	418	5.0
2015	403	4.7
2020	386	4.4
2025	373	4.2
2030	360	4.0
Percent change 2006-2030	-15.2%	-24.1%
Annualized change 2006-2030	-0.68%	-1.14%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	697	8.6
2010	695	8.4
2015	684	8.0
2020	672	7.7
2025	652	7.3
2030	628	6.9
Percent change 2006-2030	-9.8%	-19.3%
Annualized change 2006-2030	-0.43%	-0.89%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	3,917	48.2
2010	4,074	49.1
2015	4,177	49.1
2020	4,198	48.1
2025	4,182	46.9
2030	4,174	46.0
Percent change 2006-2030	6.5%	-4.7%
Annualized change 2006-2030	0.26%	-0.20%

North Country Physician Supply, 2006 – 2030

North Country Supply Scenario 1: Baseline (Supply Not Responsive to Demand)

Figure 505 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	784	182.5
2015	811	186.2
2020	826	187.7
2025	832	187.3
2030	832	186.1
Percent change 2006-2030	10.2%	4.9%
Annualized change 2006-2030	0.41%	0.20%

Figure 506 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	281	65.5	2010	503	117.0
2015	288	66.0	2015	523	120.1
2020	289	65.6	2020	537	122.0
2025	286	64.3	2025	547	123.0
2030	280	62.5	2030	553	123.6
Percent change 2006-2030	3.2%	-1.8%	Percent change 2006-2030	14.2%	8.7%
Annualized change 2006-2030	0.13%	-0.08%	Annualized change 2006-2030	0.56%	0.35%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 507 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	281	65.5	2010	122	28.5
2015	288	66.0	2015	125	28.7
2020	289	65.6	2020	125	28.4
2025	286	64.3	2025	122	27.5
2030	280	62.5	2030	118	26.3
Percent change 2006-2030	3.2%	-1.8%	Percent change 2006-2030	-1.2%	-6.0%
Annualized change 2006-2030	0.13%	-0.08%	Annualized change 2006-2030	-0.05%	-0.26%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	106	24.7	2010	53	12.3
2015	108	24.8	2015	55	12.5
2020	108	24.6	2020	56	12.6
2025	107	24.1	2025	56	12.7
2030	105	23.5	2030	57	12.7
Percent change 2006-2030	4.0%	-1.1%	Percent change 2006-2030	11.6%	6.2%
Annualized change 2006-2030	0.16%	-0.04%	Annualized change 2006-2030	0.46%	0.25%

Non-Primary Care Specialties

Figure 508 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	2.0
2015	9	2.1
2020	10	2.2
2025	10	2.3
2030	10	2.3
Percent change 2006-2030	31.0%	24.6%
Annualized change 2006-2030	1.13%	0.92%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.7
2015	60	13.9
2020	65	14.9
2025	70	15.6
2030	73	16.4
Percent change 2006-2030	43.6%	36.7%
Annualized change 2006-2030	1.52%	1.31%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	12.0
2015	53	12.1
2020	53	12.1
2025	53	11.9
2030	53	11.7
Percent change 2006-2030	5.1%	0.0%
Annualized change 2006-2030	0.21%	0.00%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.1
2015	13	2.9
2020	12	2.7
2025	11	2.5
2030	10	2.3
Percent change 2006-2030	-25.0%	-28.7%
Annualized change 2006-2030	-1.19%	-1.40%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	49	11.1
2020	47	10.6
2025	44	10.0
2030	42	9.5
Percent change 2006-2030	-15.0%	-19.2%
Annualized change 2006-2030	-0.68%	-0.88%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	8.0
2015	34	7.9
2020	36	8.1
2025	36	8.2
2030	36	8.2
Percent change 2006-2030	10.6%	5.2%
Annualized change 2006-2030	0.42%	0.21%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.6
2020	52	11.8
2025	53	11.9
2030	54	12.0
Percent change 2006-2030	19.0%	13.2%
Annualized change 2006-2030	0.73%	0.52%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	16.9
2015	82	18.9
2020	91	20.6
2025	98	22.0
2030	104	23.2
Percent change 2006-2030	57.2%	49.6%
Annualized change 2006-2030	1.90%	1.69%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.3
2015	33	7.6
2020	34	7.7
2025	35	7.8
2030	35	7.9
Percent change 2006-2030	17.3%	11.6%
Annualized change 2006-2030	0.67%	0.46%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.5
2015	19	4.3
2020	18	4.1
2025	17	3.8
2030	16	3.6
Percent change 2006-2030	-18.9%	-22.9%
Annualized change 2006-2030	-0.87%	-1.08%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	12	2.7
2025	12	2.6
2030	11	2.5
Percent change 2006-2030	-6.0%	-10.6%
Annualized change 2006-2030	-0.26%	-0.47%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.5
2015	29	6.6
2020	29	6.6
2025	29	6.6
2030	30	6.7
Percent change 2006-2030	10.4%	5.0%
Annualized change 2006-2030	0.41%	0.20%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	10	2.4
2020	10	2.2
2025	9	2.1
2030	9	2.0
Percent change 2006-2030	-18.8%	-22.7%
Annualized change 2006-2030	-0.86%	-1.07%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.6
2020	7	1.5
2025	6	1.4
2030	6	1.4
Percent change 2006-2030	-13.1%	-17.4%
Annualized change 2006-2030	-0.59%	-0.79%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.4
2015	63	14.5
2020	63	14.4
2025	63	14.1
2030	62	13.9
Percent change 2006-2030	3.8%	-1.3%
Annualized change 2006-2030	0.15%	-0.05%

North Country Supply Scenario 1: Baseline (Supply Responsive to Demand)

Figure 509 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	781	181.8
2015	807	185.3
2020	819	185.9
2025	821	184.8
2030	820	183.3
Percent change 2006-2030	8.6%	3.3%
Annualized change 2006-2030	0.34%	0.14%

Figure 510 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	281	65.3	2010	500	116.4
2015	289	66.3	2015	519	119.0
2020	288	65.5	2020	530	120.4
2025	285	64.1	2025	536	120.7
2030	278	62.2	2030	542	121.1
Percent change 2006-2030	2.6%	-2.4%	Percent change 2006-2030	11.9%	6.5%
Annualized change 2006-2030	0.11%	-0.10%	Annualized change 2006-2030	0.47%	0.26%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 511 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	281	65.3	2010	122	28.5
2015	289	66.3	2015	126	28.8
2020	288	65.5	2020	124	28.2
2025	285	64.1	2025	123	27.6
2030	278	62.2	2030	118	26.4
Percent change 2006-2030	2.6%	-2.4%	Percent change 2006-2030	-0.8%	-5.6%
Annualized change 2006-2030	0.11%	-0.10%	Annualized change 2006-2030	-0.03%	-0.24%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	105	24.5	2010	53	12.3
2015	106	24.4	2015	57	13.1
2020	105	23.9	2020	59	13.4
2025	103	23.2	2025	59	13.3
2030	100	22.5	2030	60	13.3
Percent change 2006-2030	-0.5%	-5.3%	Percent change 2006-2030	16.8%	11.1%
Annualized change 2006-2030	-0.02%	-0.23%	Annualized change 2006-2030	0.65%	0.44%

Non-Primary Care Specialties

Figure 512 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.1
2020	9	2.1
2025	9	2.1
2030	10	2.3
Percent change 2006-2030	28.8%	22.6%
Annualized change 2006-2030	1.06%	0.85%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	54	12.6
2015	59	13.6
2020	64	14.5
2025	68	15.2
2030	71	15.8
Percent change 2006-2030	38.3%	31.6%
Annualized change 2006-2030	1.36%	1.15%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	11.9
2015	52	12.0
2020	52	11.7
2025	53	11.8
2030	52	11.6
Percent change 2006-2030	4.2%	-0.9%
Annualized change 2006-2030	0.17%	-0.04%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.0
2015	13	2.9
2020	12	2.7
2025	11	2.4
2030	10	2.2
Percent change 2006-2030	-29.4%	-32.9%
Annualized change 2006-2030	-1.44%	-1.65%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	48	10.9
2020	46	10.3
2025	43	9.6
2030	41	9.2
Percent change 2006-2030	-17.8%	-21.8%
Annualized change 2006-2030	-0.82%	-1.02%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	8.0
2015	34	7.9
2020	35	8.0
2025	35	8.0
2030	35	7.9
Percent change 2006-2030	7.3%	2.1%
Annualized change 2006-2030	0.29%	0.09%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.5
2020	51	11.7
2025	52	11.7
2030	52	11.7
Percent change 2006-2030	16.0%	10.4%
Annualized change 2006-2030	0.62%	0.41%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	17.0
2015	83	19.0
2020	91	20.7
2025	99	22.2
2030	105	23.5
Percent change 2006-2030	59.3%	51.6%
Annualized change 2006-2030	1.96%	1.75%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.4
2015	33	7.6
2020	34	7.6
2025	33	7.5
2030	34	7.6
Percent change 2006-2030	13.3%	7.8%
Annualized change 2006-2030	0.52%	0.31%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.4
2015	18	4.2
2020	18	4.0
2025	16	3.7
2030	16	3.5
Percent change 2006-2030	-20.9%	-24.7%
Annualized change 2006-2030	-0.97%	-1.18%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.7
2020	12	2.7
2025	12	2.6
2030	11	2.5
Percent change 2006-2030	-8.4%	-12.8%
Annualized change 2006-2030	-0.36%	-0.57%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	27	6.4
2015	28	6.5
2020	29	6.5
2025	29	6.5
2030	29	6.6
Percent change 2006-2030	8.9%	3.6%
Annualized change 2006-2030	0.36%	0.15%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	10	2.4
2015	10	2.4
2020	9	2.1
2025	9	2.1
2030	9	1.9
Percent change 2006-2030	-21.6%	-25.4%
Annualized change 2006-2030	-1.01%	-1.21%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	6	1.4
2020	7	1.5
2025	6	1.4
2030	6	1.3
Percent change 2006-2030	-16.1%	-20.2%
Annualized change 2006-2030	-0.73%	-0.93%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.3
2015	62	14.2
2020	62	14.1
2025	61	13.8
2030	60	13.5
Percent change 2006-2030	0.5%	-4.4%
Annualized change 2006-2030	0.02%	-0.19%

North Country Supply Scenario 2a: NP/PA High Growth (Supply Not Responsive to Demand)

Figure 513 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	800	186.0
2015	844	193.7
2020	878	199.3
2025	902	203.0
2030	922	206.2
Percent change 2006-2030	22.2%	16.2%
Annualized change 2006-2030	0.84%	0.63%

Figure 514 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	291	67.7	2010	509	118.3
2015	307	70.5	2015	537	123.2
2020	319	72.4	2020	559	126.9
2025	326	73.4	2025	576	129.6
2030	331	74.1	2030	591	132.1
Percent change 2006-2030	22.3%	16.3%	Percent change 2006-2030	22.1%	16.2%
Annualized change 2006-2030	0.84%	0.63%	Annualized change 2006-2030	0.84%	0.63%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 515 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	291	67.7	2010	126	29.4
2015	307	70.5	2015	134	30.6
2020	319	72.4	2020	138	31.3
2025	326	73.4	2025	139	31.4
2030	331	74.1	2030	139	31.2
Percent change 2006-2030	22.3%	16.3%	Percent change 2006-2030	17.1%	11.4%
Annualized change 2006-2030	0.84%	0.63%	Annualized change 2006-2030	0.66%	0.45%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	110	25.5	2010	55	12.7
2015	115	26.5	2015	58	13.4
2020	120	27.2	2020	61	13.9
2025	122	27.5	2025	64	14.5
2030	124	27.8	2030	67	15.1
Percent change 2006-2030	23.3%	17.3%	Percent change 2006-2030	32.3%	25.9%
Annualized change 2006-2030	0.87%	0.67%	Annualized change 2006-2030	1.17%	0.96%

Non-Primary Care Specialties

Figure 516 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	2.0
2015	9	2.1
2020	10	2.3
2025	11	2.4
2030	11	2.5
Percent change 2006-2030	40.0%	33.2%
Annualized change 2006-2030	1.41%	1.20%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.9
2015	62	14.2
2020	68	15.4
2025	73	16.5
2030	78	17.5
Percent change 2006-2030	53.6%	46.1%
Annualized change 2006-2030	1.80%	1.59%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	52	12.1
2015	54	12.4
2020	55	12.6
2025	56	12.6
2030	56	12.6
Percent change 2006-2030	12.4%	6.9%
Annualized change 2006-2030	0.49%	0.28%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	14	3.1
2015	13	3.0
2020	12	2.8
2025	12	2.7
2030	11	2.5
Percent change 2006-2030	-19.9%	-23.8%
Annualized change 2006-2030	-0.92%	-1.12%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	50	11.6
2015	50	11.4
2020	48	11.0
2025	47	10.5
2030	45	10.2
Percent change 2006-2030	-9.2%	-13.6%
Annualized change 2006-2030	-0.40%	-0.61%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	35	8.0
2015	35	8.1
2020	37	8.4
2025	38	8.6
2030	39	8.7
Percent change 2006-2030	18.2%	12.5%
Annualized change 2006-2030	0.70%	0.49%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	49	11.3
2015	52	11.9
2020	54	12.3
2025	56	12.5
2030	57	12.8
Percent change 2006-2030	27.2%	21.0%
Annualized change 2006-2030	1.01%	0.80%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	74	17.1
2015	84	19.3
2020	94	21.4
2025	103	23.2
2030	111	24.8
Percent change 2006-2030	68.1%	60.0%
Annualized change 2006-2030	2.19%	1.98%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.4
2015	34	7.8
2020	35	8.0
2025	36	8.2
2030	38	8.4
Percent change 2006-2030	25.4%	19.3%
Annualized change 2006-2030	0.95%	0.74%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	20	4.6
2015	19	4.4
2020	19	4.2
2025	18	4.0
2030	17	3.9
Percent change 2006-2030	-13.3%	-17.5%
Annualized change 2006-2030	-0.59%	-0.80%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	12	2.8
2025	12	2.8
2030	12	2.7
Percent change 2006-2030	0.5%	-4.4%
Annualized change 2006-2030	0.02%	-0.19%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.6
2015	29	6.7
2020	30	6.9
2025	31	7.0
2030	32	7.1
Percent change 2006-2030	18.0%	12.3%
Annualized change 2006-2030	0.69%	0.48%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	11	2.4
2020	10	2.3
2025	10	2.2
2030	10	2.1
Percent change 2006-2030	-13.1%	-17.4%
Annualized change 2006-2030	-0.59%	-0.79%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.6
2020	7	1.6
2025	7	1.5
2030	7	1.5
Percent change 2006-2030	-7.1%	-11.6%
Annualized change 2006-2030	-0.31%	-0.51%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	63	14.6
2015	65	14.9
2020	66	15.0
2025	66	14.9
2030	67	14.9
Percent change 2006-2030	10.9%	5.5%
Annualized change 2006-2030	0.43%	0.22%

North Country Supply Scenario 2a: NP/PA High Growth (Supply Responsive to Demand)

Figure 517 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	797	185.5
2015	843	193.5
2020	873	198.3
2025	894	201.3
2030	913	204.1
Percent change 2006-2030	20.9%	15.0%
Annualized change 2006-2030	0.79%	0.59%

Figure 518 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	289	67.2	2010	508	118.3
2015	307	70.4	2015	536	123.0
2020	316	71.7	2020	557	126.5
2025	322	72.5	2025	573	128.9
2030	325	72.6	2030	588	131.5
Percent change 2006-2030	19.8%	14.0%	Percent change 2006-2030	21.5%	15.6%
Annualized change 2006-2030	0.76%	0.55%	Annualized change 2006-2030	0.82%	0.61%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 519 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	289	67.2	2010	126	29.3
2015	307	70.4	2015	133	30.6
2020	316	71.7	2020	136	30.9
2025	322	72.5	2025	139	31.2
2030	325	72.6	2030	138	30.8
Percent change 2006-2030	19.8%	14.0%	Percent change 2006-2030	15.8%	10.2%
Annualized change 2006-2030	0.76%	0.55%	Annualized change 2006-2030	0.61%	0.41%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	108	25.2	2010	55	12.7
2015	113	25.9	2015	61	13.9
2020	115	26.1	2020	64	14.6
2025	117	26.2	2025	67	15.0
2030	117	26.2	2030	70	15.5
Percent change 2006-2030	16.1%	10.5%	Percent change 2006-2030	36.3%	29.7%
Annualized change 2006-2030	0.63%	0.42%	Annualized change 2006-2030	1.30%	1.09%

Non-Primary Care Specialties

Figure 520 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	10	2.2
2020	10	2.2
2025	10	2.2
2030	11	2.5
Percent change 2006-2030	39.9%	33.1%
Annualized change 2006-2030	1.41%	1.20%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.8
2015	61	14.1
2020	67	15.3
2025	72	16.3
2030	77	17.1
Percent change 2006-2030	50.1%	42.9%
Annualized change 2006-2030	1.71%	1.50%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	52	12.1
2015	54	12.4
2020	54	12.3
2025	56	12.6
2030	57	12.6
Percent change 2006-2030	13.1%	7.6%
Annualized change 2006-2030	0.52%	0.31%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.1
2015	13	3.0
2020	12	2.8
2025	12	2.6
2030	11	2.4
Percent change 2006-2030	-23.4%	-27.1%
Annualized change 2006-2030	-1.10%	-1.31%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	50	11.7
2015	49	11.3
2020	48	10.9
2025	46	10.3
2030	45	10.0
Percent change 2006-2030	-10.8%	-15.1%
Annualized change 2006-2030	-0.47%	-0.68%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	35	8.2
2015	36	8.2
2020	37	8.4
2025	38	8.5
2030	38	8.6
Percent change 2006-2030	16.5%	10.9%
Annualized change 2006-2030	0.64%	0.43%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	49	11.4
2015	52	11.9
2020	54	12.3
2025	56	12.5
2030	57	12.7
Percent change 2006-2030	26.0%	19.9%
Annualized change 2006-2030	0.97%	0.76%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	74	17.3
2015	86	19.6
2020	96	21.8
2025	105	23.7
2030	114	25.5
Percent change 2006-2030	73.0%	64.6%
Annualized change 2006-2030	2.31%	2.10%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.5
2015	34	7.8
2020	35	8.0
2025	35	8.0
2030	37	8.2
Percent change 2006-2030	23.0%	17.0%
Annualized change 2006-2030	0.87%	0.66%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.5
2015	19	4.4
2020	18	4.2
2025	18	4.0
2030	17	3.8
Percent change 2006-2030	-14.1%	-18.2%
Annualized change 2006-2030	-0.63%	-0.84%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	13	2.9
2025	12	2.8
2030	12	2.7
Percent change 2006-2030	-0.5%	-5.3%
Annualized change 2006-2030	-0.02%	-0.23%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.5
2015	29	6.7
2020	30	6.8
2025	31	6.9
2030	32	7.1
Percent change 2006-2030	18.3%	12.5%
Annualized change 2006-2030	0.70%	0.49%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	11	2.5
2020	10	2.2
2025	10	2.2
2030	9	2.1
Percent change 2006-2030	-14.8%	-19.0%
Annualized change 2006-2030	-0.67%	-0.87%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.5
2020	7	1.6
2025	7	1.5
2030	6	1.4
Percent change 2006-2030	-8.9%	-13.3%
Annualized change 2006-2030	-0.39%	-0.59%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	63	14.6
2015	64	14.7
2020	65	14.8
2025	66	14.8
2030	65	14.6
Percent change 2006-2030	9.1%	3.8%
Annualized change 2006-2030	0.36%	0.16%

North Country Supply Scenario 2b: NP/PA Lower Growth (Supply Not Responsive to Demand)

Figure 521 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	795	185.0
2015	829	190.1
2020	851	193.2
2025	864	194.4
2030	873	195.2
Percent change 2006-2030	15.7%	10.1%
Annualized change 2006-2030	0.61%	0.40%

Figure 522 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	289	67.2	2010	506	117.8
2015	299	68.7	2015	529	121.4
2020	305	69.3	2020	545	123.9
2025	307	69.1	2025	557	125.3
2030	307	68.6	2030	566	126.6
Percent change 2006-2030	13.2%	7.7%	Percent change 2006-2030	17.0%	11.4%
Annualized change 2006-2030	0.52%	0.31%	Annualized change 2006-2030	0.66%	0.45%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 523 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	289	67.2	2010	125	29.2
2015	299	68.7	2015	130	29.9
2020	305	69.3	2020	132	30.0
2025	307	69.1	2025	131	29.6
2030	307	68.6	2030	129	28.9
Percent change 2006-2030	13.2%	7.7%	Percent change 2006-2030	8.5%	3.2%
Annualized change 2006-2030	0.52%	0.31%	Annualized change 2006-2030	0.34%	0.13%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	109	25.3	2010	54	12.6
2015	112	25.8	2015	57	13.0
2020	115	26.0	2020	59	13.4
2025	115	25.9	2025	61	13.6
2030	115	25.8	2030	62	14.0
Percent change 2006-2030	14.1%	8.6%	Percent change 2006-2030	22.5%	16.6%
Annualized change 2006-2030	0.55%	0.34%	Annualized change 2006-2030	0.85%	0.64%

Non-Primary Care Specialties

Figure 524 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	2.0
2015	9	2.1
2020	10	2.2
2025	10	2.3
2030	11	2.4
Percent change 2006-2030	34.2%	27.7%
Annualized change 2006-2030	1.23%	1.02%

Obstetrics and Gynecology

Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	52	12.1
2015	53	12.2
2020	54	12.3
2025	54	12.2
2030	54	12.0
Percent change 2006-2030	7.7%	2.5%
Annualized change 2006-2030	0.31%	0.10%

Psychiatry

Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	50	11.6
2015	49	11.3
2020	47	10.7
2025	45	10.2
2030	44	9.7
Percent change 2006-2030	-12.9%	-17.2%
Annualized change 2006-2030	-0.58%	-0.78%

Radiology

Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.3
2015	51	11.7
2020	53	12.0
2025	54	12.1
2030	55	12.3
Percent change 2006-2030	21.9%	16.0%
Annualized change 2006-2030	0.83%	0.62%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.4
2015	33	7.7
2020	34	7.8
2025	35	7.9
2030	36	8.1
Percent change 2006-2030	20.2%	14.3%
Annualized change 2006-2030	0.77%	0.56%

Other Internal Medicine Subspecialties

Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.8
2015	61	14.0
2020	66	15.1
2025	71	15.9
2030	75	16.8
Percent change 2006-2030	47.2%	40.0%
Annualized change 2006-2030	1.62%	1.41%

Pathology

Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.1
2015	13	2.9
2020	12	2.8
2025	11	2.6
2030	11	2.4
Percent change 2006-2030	-23.2%	-26.9%
Annualized change 2006-2030	-1.09%	-1.30%

Anesthesiology

Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	8.0
2015	35	8.0
2020	36	8.2
2025	37	8.3
2030	37	8.4
Percent change 2006-2030	13.3%	7.8%
Annualized change 2006-2030	0.52%	0.31%

Emergency Medicine

Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	17.0
2015	83	19.1
2020	92	20.9
2025	100	22.4
2030	106	23.8
Percent change 2006-2030	61.1%	53.3%
Annualized change 2006-2030	2.01%	1.80%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	20	4.6
2015	19	4.4
2020	18	4.1
2025	17	3.9
2030	17	3.7
Percent change 2006-2030	-16.9%	-20.9%
Annualized change 2006-2030	-0.77%	-0.97%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	12	2.7
2025	12	2.7
2030	12	2.6
Percent change 2006-2030	-3.7%	-8.4%
Annualized change 2006-2030	-0.16%	-0.36%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.5
2015	29	6.6
2020	30	6.7
2025	30	6.8
2030	31	6.8
Percent change 2006-2030	13.1%	7.6%
Annualized change 2006-2030	0.52%	0.31%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	10	2.4
2020	10	2.2
2025	10	2.1
2030	9	2.0
Percent change 2006-2030	-16.8%	-20.8%
Annualized change 2006-2030	-0.76%	-0.97%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.6
2020	7	1.5
2025	6	1.5
2030	6	1.4
Percent change 2006-2030	-11.0%	-15.3%
Annualized change 2006-2030	-0.48%	-0.69%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.5
2015	64	14.7
2020	64	14.6
2025	64	14.4
2030	64	14.3
Percent change 2006-2030	6.3%	1.2%
Annualized change 2006-2030	0.26%	0.05%

North Country Supply Scenario 2b: NP/PA Lower Growth (Supply Responsive to Demand)

Figure 525 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	793	184.4
2015	828	189.9
2020	847	192.2
2025	857	192.9
2030	864	193.2
Percent change 2006-2030	14.5%	8.9%
Annualized change 2006-2030	0.57%	0.36%

Figure 526 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	287	66.7	2010	506	117.7
2015	299	68.7	2015	528	121.2
2020	303	68.7	2020	544	123.5
2025	303	68.2	2025	554	124.6
2030	301	67.2	2030	564	126.0
Percent change 2006-2030	10.9%	5.5%	Percent change 2006-2030	16.5%	10.8%
Annualized change 2006-2030	0.43%	0.23%	Annualized change 2006-2030	0.64%	0.43%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 527 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	287	66.7	2010	125	29.1
2015	299	68.7	2015	130	29.8
2020	303	68.7	2020	131	29.6
2025	303	68.2	2025	130	29.4
2030	301	67.2	2030	128	28.5
Percent change 2006-2030	10.9%	5.5%	Percent change 2006-2030	7.3%	2.0%
Annualized change 2006-2030	0.43%	0.23%	Annualized change 2006-2030	0.29%	0.08%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	108	25.0	2010	54	12.6
2015	110	25.2	2015	59	13.6
2020	110	25.0	2020	62	14.0
2025	110	24.7	2025	63	14.1
2030	109	24.3	2030	64	14.4
Percent change 2006-2030	7.5%	2.3%	Percent change 2006-2030	26.2%	20.1%
Annualized change 2006-2030	0.30%	0.10%	Annualized change 2006-2030	0.97%	0.77%

Non-Primary Care Specialties

Figure 528 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	10	2.2
2020	10	2.2
2025	10	2.1
2030	11	2.4
Percent change 2006-2030	34.1%	27.6%
Annualized change 2006-2030	1.23%	1.02%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.7
2015	61	13.9
2020	66	14.9
2025	70	15.7
2030	73	16.4
Percent change 2006-2030	43.9%	36.9%
Annualized change 2006-2030	1.53%	1.32%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	52	12.0
2015	53	12.2
2020	53	12.0
2025	54	12.2
2030	54	12.1
Percent change 2006-2030	8.4%	3.2%
Annualized change 2006-2030	0.34%	0.13%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.1
2015	13	3.0
2020	12	2.7
2025	11	2.5
2030	10	2.3
Percent change 2006-2030	-26.6%	-30.1%
Annualized change 2006-2030	-1.28%	-1.48%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	50	11.6
2015	48	11.1
2020	47	10.6
2025	44	9.9
2030	43	9.6
Percent change 2006-2030	-14.5%	-18.6%
Annualized change 2006-2030	-0.65%	-0.86%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	35	8.1
2015	35	8.1
2020	36	8.2
2025	37	8.2
2030	37	8.2
Percent change 2006-2030	11.7%	6.3%
Annualized change 2006-2030	0.46%	0.25%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	49	11.3
2015	51	11.7
2020	53	12.0
2025	54	12.1
2030	54	12.1
Percent change 2006-2030	20.8%	14.9%
Annualized change 2006-2030	0.79%	0.58%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	74	17.2
2015	84	19.4
2020	94	21.3
2025	102	22.9
2030	109	24.5
Percent change 2006-2030	65.8%	57.7%
Annualized change 2006-2030	2.13%	1.92%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.5
2015	34	7.7
2020	34	7.8
2025	34	7.7
2030	35	7.9
Percent change 2006-2030	17.9%	12.2%
Annualized change 2006-2030	0.69%	0.48%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.5
2015	19	4.3
2020	18	4.1
2025	17	3.8
2030	16	3.7
Percent change 2006-2030	-17.6%	-21.6%
Annualized change 2006-2030	-0.81%	-1.01%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.7
2020	12	2.8
2025	12	2.7
2030	11	2.6
Percent change 2006-2030	-4.6%	-9.3%
Annualized change 2006-2030	-0.20%	-0.40%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.4
2015	29	6.6
2020	29	6.7
2025	30	6.7
2030	31	6.8
Percent change 2006-2030	13.4%	7.9%
Annualized change 2006-2030	0.52%	0.32%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	11	2.4
2020	10	2.2
2025	10	2.2
2030	9	2.0
Percent change 2006-2030	-18.4%	-22.3%
Annualized change 2006-2030	-0.84%	-1.05%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	6	1.5
2020	7	1.6
2025	6	1.5
2030	6	1.4
Percent change 2006-2030	-12.7%	-16.9%
Annualized change 2006-2030	-0.56%	-0.77%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.5
2015	63	14.5
2020	64	14.4
2025	63	14.3
2030	63	14.0
Percent change 2006-2030	4.6%	-0.5%
Annualized change 2006-2030	0.19%	-0.02%

North Country Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 529 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	785	182.7
2015	817	187.5
2020	837	190.2
2025	848	190.9
2030	852	190.5
Percent change 2006-2030	12.9%	7.4%
Annualized change 2006-2030	0.51%	0.30%

Figure 530 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	282	65.6	2010	504	117.2
2015	290	66.5	2015	527	121.0
2020	293	66.5	2020	545	123.7
2025	291	65.5	2025	557	125.4
2030	286	64.0	2030	566	126.6
Percent change 2006-2030	5.6%	0.5%	Percent change 2006-2030	17.0%	11.3%
Annualized change 2006-2030	0.23%	0.02%	Annualized change 2006-2030	0.66%	0.45%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 531– North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	282	65.6	2010	122	28.5
2015	290	66.5	2015	126	28.9
2020	293	66.5	2020	126	28.7
2025	291	65.5	2025	124	28.0
2030	286	64.0	2030	120	26.9
Percent change 2006-2030	5.6%	0.5%	Percent change 2006-2030	1.2%	-3.7%
Annualized change 2006-2030	0.23%	0.02%	Annualized change 2006-2030	0.05%	-0.16%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	106	24.7	2010	53	12.3
2015	109	25.0	2015	55	12.6
2020	110	24.9	2020	56	12.8
2025	109	24.6	2025	57	12.9
2030	108	24.0	2030	58	13.0
Percent change 2006-2030	6.5%	1.3%	Percent change 2006-2030	14.3%	8.8%
Annualized change 2006-2030	0.26%	0.05%	Annualized change 2006-2030	0.56%	0.35%

Non-Primary Care Specialties

Figure 532 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	2.0
2015	9	2.1
2020	10	2.2
2025	10	2.3
2030	11	2.4
Percent change 2006-2030	34.1%	27.6%
Annualized change 2006-2030	1.23%	1.02%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.7
2015	61	14.0
2020	66	15.1
2025	71	15.9
2030	75	16.8
Percent change 2006-2030	47.1%	40.0%
Annualized change 2006-2030	1.62%	1.41%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	52	12.0
2015	53	12.2
2020	54	12.3
2025	54	12.2
2030	54	12.0
Percent change 2006-2030	7.6%	2.4%
Annualized change 2006-2030	0.31%	0.10%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.1
2015	13	2.9
2020	12	2.8
2025	11	2.6
2030	11	2.4
Percent change 2006-2030	-23.2%	-27.0%
Annualized change 2006-2030	-1.10%	-1.30%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	49	11.2
2020	47	10.7
2025	45	10.2
2030	44	9.7
Percent change 2006-2030	-13.0%	-17.2%
Annualized change 2006-2030	-0.58%	-0.78%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	8.0
2015	35	8.0
2020	36	8.2
2025	37	8.3
2030	37	8.4
Percent change 2006-2030	13.2%	7.7%
Annualized change 2006-2030	0.52%	0.31%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	51	11.7
2020	53	11.9
2025	54	12.1
2030	55	12.3
Percent change 2006-2030	21.8%	15.9%
Annualized change 2006-2030	0.83%	0.62%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	16.9
2015	83	19.0
2020	92	20.9
2025	100	22.5
2030	106	23.8
Percent change 2006-2030	61.0%	53.2%
Annualized change 2006-2030	2.01%	1.79%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.3
2015	33	7.6
2020	34	7.8
2025	35	7.9
2030	36	8.1
Percent change 2006-2030	20.1%	14.3%
Annualized change 2006-2030	0.77%	0.56%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	20	4.5
2015	19	4.3
2020	18	4.1
2025	17	3.9
2030	17	3.7
Percent change 2006-2030	-17.0%	-21.0%
Annualized change 2006-2030	-0.77%	-0.98%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	12	2.7
2025	12	2.7
2030	12	2.6
Percent change 2006-2030	-3.8%	-8.4%
Annualized change 2006-2030	-0.16%	-0.37%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.5
2015	29	6.6
2020	30	6.7
2025	30	6.8
2030	31	6.8
Percent change 2006-2030	13.1%	7.6%
Annualized change 2006-2030	0.51%	0.30%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	10	2.4
2020	10	2.2
2025	10	2.1
2030	9	2.0
Percent change 2006-2030	-16.8%	-20.8%
Annualized change 2006-2030	-0.76%	-0.97%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.6
2020	7	1.5
2025	6	1.5
2030	6	1.4
Percent change 2006-2030	-11.0%	-15.4%
Annualized change 2006-2030	-0.49%	-0.69%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.5
2015	64	14.6
2020	64	14.6
2025	64	14.4
2030	64	14.3
Percent change 2006-2030	6.3%	1.1%
Annualized change 2006-2030	0.25%	0.05%

North Country Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 533 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	782	182.0
2015	813	186.7
2020	829	188.3
2025	837	188.3
2030	840	187.7
Percent change 2006-2030	11.2%	5.8%
Annualized change 2006-2030	0.44%	0.24%

Figure 534 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	281	65.4	2010	501	116.6
2015	291	66.7	2015	523	119.9
2020	292	66.3	2020	538	122.1
2025	290	65.3	2025	547	123.0
2030	285	63.6	2030	555	124.0
Percent change 2006-2030	5.1%	0.0%	Percent change 2006-2030	14.6%	9.1%
Annualized change 2006-2030	0.21%	0.00%	Annualized change 2006-2030	0.57%	0.36%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 535– North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	281	65.4	2010	123	28.5
2015	291	66.7	2015	126	29.0
2020	292	66.3	2020	126	28.6
2025	290	65.3	2025	125	28.1
2030	285	63.6	2030	121	27.0
Percent change 2006-2030	5.1%	0.0%	Percent change 2006-2030	1.6%	-3.4%
Annualized change 2006-2030	0.21%	0.00%	Annualized change 2006-2030	0.07%	-0.14%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	105	24.5	2010	53	12.3
2015	107	24.5	2015	57	13.2
2020	106	24.2	2020	60	13.5
2025	105	23.7	2025	60	13.5
2030	103	23.0	2030	61	13.6
Percent change 2006-2030	1.9%	-3.1%	Percent change 2006-2030	19.5%	13.7%
Annualized change 2006-2030	0.08%	-0.13%	Annualized change 2006-2030	0.75%	0.54%

Non-Primary Care Specialties

Figure 536 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.2
2020	9	2.2
2025	9	2.1
2030	11	2.4
Percent change 2006-2030	32.0%	25.5%
Annualized change 2006-2030	1.16%	0.95%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	54	12.6
2015	60	13.8
2020	65	14.7
2025	69	15.5
2030	72	16.1
Percent change 2006-2030	41.6%	34.8%
Annualized change 2006-2030	1.46%	1.25%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	11.9
2015	53	12.1
2020	52	11.9
2025	54	12.1
2030	53	11.9
Percent change 2006-2030	6.7%	1.6%
Annualized change 2006-2030	0.27%	0.06%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.0
2015	13	3.0
2020	12	2.7
2025	11	2.5
2030	10	2.3
Percent change 2006-2030	-27.7%	-31.2%
Annualized change 2006-2030	-1.34%	-1.55%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	48	11.0
2020	46	10.5
2025	44	9.8
2030	42	9.4
Percent change 2006-2030	-15.8%	-19.9%
Annualized change 2006-2030	-0.72%	-0.92%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	35	8.0
2015	35	8.0
2020	36	8.1
2025	36	8.1
2030	36	8.1
Percent change 2006-2030	9.9%	4.6%
Annualized change 2006-2030	0.39%	0.19%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.6
2020	52	11.8
2025	53	12.0
2030	53	12.0
Percent change 2006-2030	18.9%	13.1%
Annualized change 2006-2030	0.72%	0.51%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	17.0
2015	83	19.1
2020	92	21.0
2025	101	22.6
2030	108	24.1
Percent change 2006-2030	63.2%	55.3%
Annualized change 2006-2030	2.06%	1.85%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.4
2015	33	7.6
2020	34	7.7
2025	34	7.6
2030	35	7.8
Percent change 2006-2030	16.0%	10.4%
Annualized change 2006-2030	0.62%	0.41%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.4
2015	19	4.2
2020	18	4.0
2025	17	3.8
2030	16	3.6
Percent change 2006-2030	-18.9%	-22.9%
Annualized change 2006-2030	-0.87%	-1.08%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.7
2020	12	2.8
2025	12	2.7
2030	11	2.5
Percent change 2006-2030	-6.1%	-10.7%
Annualized change 2006-2030	-0.26%	-0.47%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	27	6.4
2015	28	6.5
2020	29	6.6
2025	29	6.6
2030	30	6.7
Percent change 2006-2030	11.6%	6.2%
Annualized change 2006-2030	0.46%	0.25%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	10	2.4
2015	10	2.4
2020	10	2.2
2025	10	2.1
2030	9	2.0
Percent change 2006-2030	-19.7%	-23.6%
Annualized change 2006-2030	-0.91%	-1.11%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	6	1.5
2020	7	1.6
2025	6	1.4
2030	6	1.3
Percent change 2006-2030	-14.0%	-18.2%
Annualized change 2006-2030	-0.63%	-0.83%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.4
2015	62	14.3
2020	63	14.3
2025	63	14.1
2030	62	13.8
Percent change 2006-2030	3.0%	-2.0%
Annualized change 2006-2030	0.12%	-0.09%

North Country Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 537 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	785	182.7
2015	817	187.5
2020	837	190.2
2025	848	190.9
2030	852	190.5
Percent change 2006-2030	12.9%	7.4%
Annualized change 2006-2030	0.51%	0.30%

Figure 538 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	282	65.5	2010	504	117.2
2015	289	66.4	2015	528	121.1
2020	292	66.3	2020	546	123.9
2025	290	65.2	2025	559	125.7
2030	285	63.6	2030	568	126.9
Percent change 2006-2030	5.0%	-0.1%	Percent change 2006-2030	17.3%	11.6%
Annualized change 2006-2030	0.20%	0.00%	Annualized change 2006-2030	0.67%	0.46%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 539– North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	282	65.5	2010	122	28.5
2015	289	66.4	2015	126	28.9
2020	292	66.3	2020	126	28.6
2025	290	65.2	2025	124	27.9
2030	285	63.6	2030	120	26.8
Percent change 2006-2030	5.0%	-0.1%	Percent change 2006-2030	0.6%	-4.3%
Annualized change 2006-2030	0.20%	0.00%	Annualized change 2006-2030	0.02%	-0.18%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	106	24.7	2010	53	12.3
2015	109	24.9	2015	55	12.6
2020	109	24.9	2020	56	12.8
2025	109	24.5	2025	57	12.9
2030	107	23.9	2030	58	13.0
Percent change 2006-2030	5.9%	0.7%	Percent change 2006-2030	13.6%	8.1%
Annualized change 2006-2030	0.24%	0.03%	Annualized change 2006-2030	0.53%	0.33%

Non-Primary Care Specialties

Figure 540 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	2.0
2015	9	2.1
2020	10	2.2
2025	10	2.3
2030	11	2.4
Percent change 2006-2030	34.5%	28.0%
Annualized change 2006-2030	1.24%	1.03%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.8
2015	61	14.0
2020	66	15.1
2025	71	16.0
2030	75	16.8
Percent change 2006-2030	47.5%	40.4%
Annualized change 2006-2030	1.63%	1.42%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	52	12.0
2015	53	12.2
2020	54	12.3
2025	54	12.2
2030	54	12.1
Percent change 2006-2030	7.9%	2.7%
Annualized change 2006-2030	0.32%	0.11%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.1
2015	13	2.9
2020	12	2.8
2025	11	2.6
2030	11	2.4
Percent change 2006-2030	-23.0%	-26.7%
Annualized change 2006-2030	-1.08%	-1.29%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	49	11.2
2020	47	10.7
2025	45	10.2
2030	44	9.8
Percent change 2006-2030	-12.7%	-17.0%
Annualized change 2006-2030	-0.57%	-0.77%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	8.0
2015	35	8.0
2020	36	8.2
2025	37	8.4
2030	37	8.4
Percent change 2006-2030	13.6%	8.0%
Annualized change 2006-2030	0.53%	0.32%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	51	11.7
2020	53	12.0
2025	54	12.2
2030	55	12.3
Percent change 2006-2030	22.2%	16.3%
Annualized change 2006-2030	0.84%	0.63%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	16.9
2015	83	19.0
2020	92	20.9
2025	100	22.5
2030	107	23.8
Percent change 2006-2030	61.5%	53.7%
Annualized change 2006-2030	2.02%	1.81%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.3
2015	33	7.6
2020	34	7.8
2025	35	8.0
2030	36	8.1
Percent change 2006-2030	20.4%	14.6%
Annualized change 2006-2030	0.78%	0.57%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	20	4.5
2015	19	4.3
2020	18	4.1
2025	17	3.9
2030	17	3.7
Percent change 2006-2030	-16.7%	-20.8%
Annualized change 2006-2030	-0.76%	-0.96%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	12	2.7
2025	12	2.7
2030	12	2.6
Percent change 2006-2030	-3.5%	-8.2%
Annualized change 2006-2030	-0.15%	-0.35%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.5
2015	29	6.6
2020	30	6.7
2025	30	6.8
2030	31	6.8
Percent change 2006-2030	13.4%	7.9%
Annualized change 2006-2030	0.52%	0.32%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	10	2.4
2020	10	2.2
2025	10	2.2
2030	9	2.1
Percent change 2006-2030	-16.6%	-20.6%
Annualized change 2006-2030	-0.75%	-0.96%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.6
2020	7	1.5
2025	7	1.5
2030	6	1.4
Percent change 2006-2030	-10.8%	-15.1%
Annualized change 2006-2030	-0.47%	-0.68%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.5
2015	64	14.7
2020	64	14.6
2025	64	14.4
2030	64	14.3
Percent change 2006-2030	6.6%	1.4%
Annualized change 2006-2030	0.27%	0.06%

North Country Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 541 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	782	182.0
2015	813	186.7
2020	829	188.3
2025	837	188.3
2030	840	187.7
Percent change 2006-2030	11.2%	5.8%
Annualized change 2006-2030	0.44%	0.24%

Figure 542 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	281	65.4	2010	501	116.6
2015	290	66.6	2015	523	120.0
2020	291	66.1	2020	538	122.3
2025	289	65.0	2025	548	123.3
2030	283	63.3	2030	556	124.4
Percent change 2006-2030	4.5%	-0.6%	Percent change 2006-2030	15.0%	9.4%
Annualized change 2006-2030	0.18%	-0.03%	Annualized change 2006-2030	0.58%	0.37%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 543– North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	281	65.4	2010	123	28.5
2015	290	66.6	2015	126	29.0
2020	291	66.1	2020	126	28.5
2025	289	65.0	2025	124	28.0
2030	283	63.3	2030	120	26.9
Percent change 2006-2030	4.5%	-0.6%	Percent change 2006-2030	1.0%	-3.9%
Annualized change 2006-2030	0.18%	-0.03%	Annualized change 2006-2030	0.04%	-0.17%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	105	24.5	2010	53	12.3
2015	107	24.5	2015	57	13.2
2020	106	24.1	2020	59	13.5
2025	105	23.6	2025	60	13.5
2030	102	22.9	2030	61	13.5
Percent change 2006-2030	1.3%	-3.6%	Percent change 2006-2030	18.8%	13.1%
Annualized change 2006-2030	0.05%	-0.15%	Annualized change 2006-2030	0.72%	0.51%

Non-Primary Care Specialties

Figure 544 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.2
2020	10	2.2
2025	9	2.1
2030	11	2.4
Percent change 2006-2030	32.3%	25.9%
Annualized change 2006-2030	1.17%	0.96%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	54	12.6
2015	60	13.8
2020	65	14.8
2025	69	15.6
2030	72	16.2
Percent change 2006-2030	42.1%	35.2%
Annualized change 2006-2030	1.47%	1.26%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	11.9
2015	53	12.1
2020	52	11.9
2025	54	12.1
2030	54	12.0
Percent change 2006-2030	7.0%	1.9%
Annualized change 2006-2030	0.28%	0.08%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.0
2015	13	3.0
2020	12	2.7
2025	11	2.5
2030	10	2.3
Percent change 2006-2030	-27.5%	-31.0%
Annualized change 2006-2030	-1.33%	-1.54%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	48	11.0
2020	46	10.5
2025	44	9.8
2030	42	9.4
Percent change 2006-2030	-15.6%	-19.7%
Annualized change 2006-2030	-0.70%	-0.91%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	35	8.0
2015	35	8.0
2020	36	8.1
2025	36	8.1
2030	36	8.1
Percent change 2006-2030	10.2%	4.9%
Annualized change 2006-2030	0.41%	0.20%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.6
2020	52	11.9
2025	53	12.0
2030	54	12.0
Percent change 2006-2030	19.2%	13.4%
Annualized change 2006-2030	0.74%	0.53%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	17.0
2015	84	19.2
2020	93	21.0
2025	101	22.7
2030	108	24.1
Percent change 2006-2030	63.7%	55.7%
Annualized change 2006-2030	2.07%	1.86%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.4
2015	33	7.6
2020	34	7.7
2025	34	7.6
2030	35	7.8
Percent change 2006-2030	16.4%	10.7%
Annualized change 2006-2030	0.63%	0.43%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.4
2015	19	4.2
2020	18	4.0
2025	17	3.8
2030	16	3.6
Percent change 2006-2030	-18.7%	-22.6%
Annualized change 2006-2030	-0.86%	-1.06%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.7
2020	12	2.8
2025	12	2.7
2030	11	2.5
Percent change 2006-2030	-5.9%	-10.4%
Annualized change 2006-2030	-0.25%	-0.46%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	27	6.4
2015	28	6.5
2020	29	6.6
2025	30	6.6
2030	30	6.8
Percent change 2006-2030	11.9%	6.5%
Annualized change 2006-2030	0.47%	0.26%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	10	2.4
2015	10	2.4
2020	10	2.2
2025	10	2.1
2030	9	2.0
Percent change 2006-2030	-19.4%	-23.3%
Annualized change 2006-2030	-0.90%	-1.10%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	6	1.5
2020	7	1.6
2025	6	1.4
2030	6	1.3
Percent change 2006-2030	-13.8%	-18.0%
Annualized change 2006-2030	-0.62%	-0.82%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.4
2015	63	14.3
2020	63	14.3
2025	63	14.1
2030	62	13.8
Percent change 2006-2030	3.3%	-1.8%
Annualized change 2006-2030	0.13%	-0.07%

North Country Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 545 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	785	182.7
2015	817	187.5
2020	837	190.2
2025	848	190.9
2030	852	190.5
Percent change 2006-2030	12.9%	7.4%
Annualized change 2006-2030	0.51%	0.30%

Figure 546 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	282	65.5	2010	504	117.2
2015	289	66.3	2015	528	121.2
2020	291	66.1	2020	546	124.0
2025	289	65.1	2025	559	125.9
2030	284	63.4	2030	569	127.1
Percent change 2006-2030	4.6%	-0.4%	Percent change 2006-2030	17.5%	11.8%
Annualized change 2006-2030	0.19%	-0.02%	Annualized change 2006-2030	0.67%	0.47%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 547 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	282	65.5	2010	122	28.5
2015	289	66.3	2015	126	28.8
2020	291	66.1	2020	126	28.6
2025	289	65.1	2025	124	27.8
2030	284	63.4	2030	119	26.7
Percent change 2006-2030	4.6%	-0.4%	Percent change 2006-2030	0.2%	-4.6%
Annualized change 2006-2030	0.19%	-0.02%	Annualized change 2006-2030	0.01%	-0.20%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	106	24.7	2010	53	12.3
2015	109	24.9	2015	55	12.6
2020	109	24.8	2020	56	12.7
2025	108	24.4	2025	57	12.8
2030	107	23.8	2030	58	12.9
Percent change 2006-2030	5.5%	0.4%	Percent change 2006-2030	13.2%	7.7%
Annualized change 2006-2030	0.22%	0.01%	Annualized change 2006-2030	0.52%	0.31%

Non-Primary Care Specialties

Figure 548 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	2.0
2015	9	2.1
2020	10	2.2
2025	10	2.3
2030	11	2.4
Percent change 2006-2030	34.8%	28.2%
Annualized change 2006-2030	1.25%	1.04%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.8
2015	61	14.0
2020	66	15.1
2025	71	16.0
2030	75	16.8
Percent change 2006-2030	47.8%	40.6%
Annualized change 2006-2030	1.64%	1.43%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	52	12.0
2015	53	12.2
2020	54	12.3
2025	54	12.2
2030	54	12.1
Percent change 2006-2030	8.1%	2.9%
Annualized change 2006-2030	0.33%	0.12%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.1
2015	13	2.9
2020	12	2.8
2025	12	2.6
2030	11	2.4
Percent change 2006-2030	-22.9%	-26.6%
Annualized change 2006-2030	-1.08%	-1.28%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	49	11.2
2020	47	10.7
2025	45	10.2
2030	44	9.8
Percent change 2006-2030	-12.6%	-16.8%
Annualized change 2006-2030	-0.56%	-0.76%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	8.0
2015	35	8.0
2020	36	8.2
2025	37	8.4
2030	38	8.4
Percent change 2006-2030	13.8%	8.2%
Annualized change 2006-2030	0.54%	0.33%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	51	11.7
2020	53	12.0
2025	54	12.2
2030	55	12.3
Percent change 2006-2030	22.4%	16.5%
Annualized change 2006-2030	0.85%	0.64%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	16.9
2015	83	19.0
2020	92	20.9
2025	100	22.5
2030	107	23.9
Percent change 2006-2030	61.8%	53.9%
Annualized change 2006-2030	2.03%	1.81%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.3
2015	33	7.7
2020	34	7.8
2025	35	8.0
2030	36	8.1
Percent change 2006-2030	20.7%	14.8%
Annualized change 2006-2030	0.79%	0.58%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	20	4.5
2015	19	4.3
2020	18	4.1
2025	17	3.9
2030	17	3.7
Percent change 2006-2030	-16.6%	-20.6%
Annualized change 2006-2030	-0.75%	-0.96%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	12	2.7
2025	12	2.7
2030	12	2.6
Percent change 2006-2030	-3.3%	-8.0%
Annualized change 2006-2030	-0.14%	-0.35%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.5
2015	29	6.6
2020	30	6.7
2025	30	6.8
2030	31	6.9
Percent change 2006-2030	13.6%	8.1%
Annualized change 2006-2030	0.53%	0.32%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	10	2.4
2020	10	2.2
2025	10	2.2
2030	9	2.1
Percent change 2006-2030	-16.4%	-20.5%
Annualized change 2006-2030	-0.74%	-0.95%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.6
2020	7	1.5
2025	7	1.5
2030	6	1.4
Percent change 2006-2030	-10.6%	-15.0%
Annualized change 2006-2030	-0.47%	-0.67%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.5
2015	64	14.7
2020	64	14.6
2025	64	14.5
2030	64	14.3
Percent change 2006-2030	6.8%	1.6%
Annualized change 2006-2030	0.27%	0.07%

North Country Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 549 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	782	182.0
2015	813	186.7
2020	829	188.3
2025	837	188.3
2030	840	187.7
Percent change 2006-2030	11.2%	5.8%
Annualized change 2006-2030	0.44%	0.24%

Figure 550 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	281	65.4	2010	501	116.6
2015	290	66.6	2015	523	120.1
2020	290	66.0	2020	539	122.4
2025	288	64.8	2025	549	123.5
2030	282	63.1	2030	557	124.6
Percent change 2006-2030	4.1%	-1.0%	Percent change 2006-2030	15.2%	9.6%
Annualized change 2006-2030	0.17%	-0.04%	Annualized change 2006-2030	0.59%	0.38%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 551 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	281	65.4	2010	123	28.5
2015	290	66.6	2015	126	28.9
2020	290	66.0	2020	125	28.5
2025	288	64.8	2025	124	27.9
2030	282	63.1	2030	120	26.8
Percent change 2006-2030	4.1%	-1.0%	Percent change 2006-2030	0.6%	-4.2%
Annualized change 2006-2030	0.17%	-0.04%	Annualized change 2006-2030	0.03%	-0.18%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	105	24.5	2010	53	12.3
2015	107	24.5	2015	57	13.1
2020	106	24.0	2020	59	13.5
2025	104	23.5	2025	60	13.4
2030	102	22.8	2030	60	13.5
Percent change 2006-2030	0.9%	-4.0%	Percent change 2006-2030	18.4%	12.7%
Annualized change 2006-2030	0.04%	-0.17%	Annualized change 2006-2030	0.71%	0.50%

Non-Primary Care Specialties

Figure 552 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.2
2020	10	2.2
2025	9	2.1
2030	11	2.4
Percent change 2006-2030	32.6%	26.1%
Annualized change 2006-2030	1.18%	0.97%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	54	12.6
2015	60	13.8
2020	65	14.8
2025	69	15.6
2030	73	16.2
Percent change 2006-2030	42.3%	35.4%
Annualized change 2006-2030	1.48%	1.27%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	11.9
2015	53	12.1
2020	52	11.9
2025	54	12.1
2030	54	12.0
Percent change 2006-2030	7.2%	2.0%
Annualized change 2006-2030	0.29%	0.08%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.0
2015	13	3.0
2020	12	2.7
2025	11	2.5
2030	10	2.3
Percent change 2006-2030	-27.4%	-30.9%
Annualized change 2006-2030	-1.32%	-1.53%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	48	11.0
2020	46	10.5
2025	44	9.8
2030	42	9.5
Percent change 2006-2030	-15.4%	-19.5%
Annualized change 2006-2030	-0.70%	-0.90%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	35	8.0
2015	35	8.0
2020	36	8.1
2025	36	8.2
2030	36	8.1
Percent change 2006-2030	10.4%	5.1%
Annualized change 2006-2030	0.41%	0.21%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.6
2020	52	11.9
2025	53	12.0
2030	54	12.0
Percent change 2006-2030	19.4%	13.6%
Annualized change 2006-2030	0.74%	0.53%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	17.0
2015	84	19.2
2020	93	21.1
2025	101	22.7
2030	108	24.2
Percent change 2006-2030	63.9%	56.0%
Annualized change 2006-2030	2.08%	1.87%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.4
2015	33	7.6
2020	34	7.8
2025	34	7.6
2030	35	7.8
Percent change 2006-2030	16.6%	10.9%
Annualized change 2006-2030	0.64%	0.43%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.4
2015	19	4.3
2020	18	4.0
2025	17	3.8
2030	16	3.6
Percent change 2006-2030	-18.6%	-22.5%
Annualized change 2006-2030	-0.85%	-1.06%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.7
2020	12	2.8
2025	12	2.7
2030	11	2.5
Percent change 2006-2030	-5.7%	-10.3%
Annualized change 2006-2030	-0.24%	-0.45%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	27	6.4
2015	28	6.5
2020	29	6.6
2025	30	6.7
2030	30	6.8
Percent change 2006-2030	12.1%	6.7%
Annualized change 2006-2030	0.48%	0.27%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	10	2.4
2015	10	2.4
2020	10	2.2
2025	10	2.1
2030	9	2.0
Percent change 2006-2030	-19.3%	-23.2%
Annualized change 2006-2030	-0.89%	-1.09%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	6	1.5
2020	7	1.6
2025	6	1.4
2030	6	1.4
Percent change 2006-2030	-13.6%	-17.8%
Annualized change 2006-2030	-0.61%	-0.81%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.4
2015	63	14.4
2020	63	14.3
2025	63	14.1
2030	62	13.9
Percent change 2006-2030	3.4%	-1.6%
Annualized change 2006-2030	0.14%	-0.07%

North Country Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 553 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	783	182.3
2015	805	184.8
2020	815	185.2
2025	816	183.7
2030	812	181.6
Percent change 2006-2030	7.6%	2.4%
Annualized change 2006-2030	0.31%	0.10%

Figure 554 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	281	65.4	2010	502	116.9
2015	286	65.6	2015	519	119.2
2020	285	64.8	2020	530	120.4
2025	281	63.1	2025	536	120.6
2030	273	61.0	2030	539	120.6
Percent change 2006-2030	0.7%	-4.2%	Percent change 2006-2030	11.5%	6.0%
Annualized change 2006-2030	0.03%	-0.18%	Annualized change 2006-2030	0.45%	0.24%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 555 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	281	65.4	2010	122	28.4
2015	286	65.6	2015	124	28.5
2020	285	64.8	2020	123	28.0
2025	281	63.1	2025	120	27.0
2030	273	61.0	2030	115	25.7
Percent change 2006-2030	0.7%	-4.2%	Percent change 2006-2030	-3.5%	-8.2%
Annualized change 2006-2030	0.03%	-0.18%	Annualized change 2006-2030	-0.15%	-0.36%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	106	24.7	2010	53	12.3
2015	107	24.6	2015	54	12.4
2020	107	24.3	2020	55	12.5
2025	105	23.7	2025	55	12.5
2030	103	22.9	2030	56	12.4
Percent change 2006-2030	1.5%	-3.4%	Percent change 2006-2030	9.0%	3.7%
Annualized change 2006-2030	0.06%	-0.14%	Annualized change 2006-2030	0.36%	0.15%

Non-Primary Care Specialties

Figure 556 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.1
2020	9	2.2
2025	10	2.2
2030	10	2.3
Percent change 2006-2030	27.8%	21.6%
Annualized change 2006-2030	1.03%	0.82%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.7
2015	60	13.8
2020	65	14.7
2025	68	15.3
2030	71	16.0
Percent change 2006-2030	40.2%	33.4%
Annualized change 2006-2030	1.42%	1.21%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	12.0
2015	52	12.0
2020	52	11.9
2025	52	11.7
2030	51	11.5
Percent change 2006-2030	2.6%	-2.4%
Annualized change 2006-2030	0.11%	-0.10%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.1
2015	13	2.9
2020	12	2.7
2025	11	2.5
2030	10	2.3
Percent change 2006-2030	-26.9%	-30.4%
Annualized change 2006-2030	-1.29%	-1.50%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	48	11.1
2020	46	10.4
2025	43	9.8
2030	41	9.3
Percent change 2006-2030	-17.1%	-21.1%
Annualized change 2006-2030	-0.78%	-0.98%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	7.9
2015	34	7.8
2020	35	8.0
2025	36	8.0
2030	36	8.0
Percent change 2006-2030	7.9%	2.7%
Annualized change 2006-2030	0.32%	0.11%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.5
2020	51	11.6
2025	52	11.7
2030	52	11.7
Percent change 2006-2030	16.1%	10.5%
Annualized change 2006-2030	0.62%	0.42%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	16.9
2015	82	18.7
2020	89	20.3
2025	96	21.6
2030	101	22.6
Percent change 2006-2030	53.5%	46.0%
Annualized change 2006-2030	1.80%	1.59%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	31	7.3
2015	33	7.5
2020	33	7.6
2025	34	7.6
2030	34	7.7
Percent change 2006-2030	14.4%	8.9%
Annualized change 2006-2030	0.56%	0.36%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.5
2015	19	4.3
2020	18	4.0
2025	17	3.8
2030	16	3.5
Percent change 2006-2030	-20.9%	-24.7%
Annualized change 2006-2030	-0.97%	-1.18%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	12	2.7
2025	11	2.6
2030	11	2.5
Percent change 2006-2030	-8.3%	-12.7%
Annualized change 2006-2030	-0.36%	-0.57%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.5
2015	28	6.5
2020	29	6.5
2025	29	6.5
2030	29	6.5
Percent change 2006-2030	7.7%	2.5%
Annualized change 2006-2030	0.31%	0.10%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	10	2.3
2020	10	2.2
2025	9	2.1
2030	9	1.9
Percent change 2006-2030	-20.7%	-24.6%
Annualized change 2006-2030	-0.96%	-1.17%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.5
2020	7	1.5
2025	6	1.4
2030	6	1.3
Percent change 2006-2030	-15.2%	-19.3%
Annualized change 2006-2030	-0.69%	-0.89%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.4
2015	63	14.4
2020	62	14.2
2025	62	13.9
2030	61	13.6
Percent change 2006-2030	1.2%	-3.7%
Annualized change 2006-2030	0.05%	-0.16%

North Country Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 557 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	780	181.5
2015	802	183.9
2020	808	183.4
2025	805	181.2
2030	800	178.8
Percent change 2006-2030	6.0%	0.8%
Annualized change 2006-2030	0.24%	0.03%

Figure 558 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	280	65.3	2010	500	116.3
2015	287	65.8	2015	515	118.1
2020	285	64.6	2020	523	118.8
2025	280	62.9	2025	526	118.3
2030	272	60.7	2030	528	118.1
Percent change 2006-2030	0.2%	-4.7%	Percent change 2006-2030	9.2%	3.9%
Annualized change 2006-2030	0.01%	-0.20%	Annualized change 2006-2030	0.37%	0.16%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 559 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	280	65.3	2010	122	28.5
2015	287	65.8	2015	125	28.6
2020	285	64.6	2020	123	27.9
2025	280	62.9	2025	120	27.1
2030	272	60.7	2030	115	25.8
Percent change 2006-2030	0.2%	-4.7%	Percent change 2006-2030	-3.1%	-7.8%
Annualized change 2006-2030	0.01%	-0.20%	Annualized change 2006-2030	-0.13%	-0.34%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	105	24.5	2010	53	12.3
2015	105	24.2	2015	57	13.0
2020	104	23.6	2020	58	13.2
2025	101	22.8	2025	58	13.1
2030	98	21.9	2030	58	13.0
Percent change 2006-2030	-2.9%	-7.6%	Percent change 2006-2030	14.0%	8.5%
Annualized change 2006-2030	-0.12%	-0.33%	Annualized change 2006-2030	0.55%	0.34%

Non-Primary Care Specialties

Figure 560 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.1
2020	9	2.1
2025	9	2.0
2030	10	2.2
Percent change 2006-2030	25.7%	19.6%
Annualized change 2006-2030	0.96%	0.75%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	54	12.6
2015	59	13.5
2020	63	14.3
2025	66	14.9
2030	69	15.4
Percent change 2006-2030	34.9%	28.4%
Annualized change 2006-2030	1.26%	1.05%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	11.9
2015	52	11.9
2020	51	11.6
2025	51	11.6
2030	51	11.4
Percent change 2006-2030	1.7%	-3.3%
Annualized change 2006-2030	0.07%	-0.14%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.0
2015	13	2.9
2020	12	2.6
2025	11	2.4
2030	10	2.2
Percent change 2006-2030	-31.2%	-34.5%
Annualized change 2006-2030	-1.54%	-1.75%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	47	10.8
2020	45	10.2
2025	42	9.4
2030	40	9.0
Percent change 2006-2030	-19.8%	-23.7%
Annualized change 2006-2030	-0.92%	-1.12%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	8.0
2015	34	7.9
2020	35	7.9
2025	35	7.8
2030	35	7.7
Percent change 2006-2030	4.7%	-0.4%
Annualized change 2006-2030	0.19%	-0.02%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.4
2020	51	11.5
2025	51	11.5
2030	51	11.4
Percent change 2006-2030	13.2%	7.7%
Annualized change 2006-2030	0.52%	0.31%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	17.0
2015	82	18.9
2020	90	20.4
2025	97	21.8
2030	103	22.9
Percent change 2006-2030	55.4%	47.9%
Annualized change 2006-2030	1.85%	1.64%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.4
2015	33	7.5
2020	33	7.5
2025	33	7.3
2030	33	7.4
Percent change 2006-2030	10.5%	5.1%
Annualized change 2006-2030	0.42%	0.21%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.4
2015	18	4.2
2020	17	3.9
2025	16	3.6
2030	15	3.5
Percent change 2006-2030	-22.8%	-26.5%
Annualized change 2006-2030	-1.07%	-1.28%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.7
2020	12	2.7
2025	11	2.6
2030	11	2.4
Percent change 2006-2030	-10.6%	-14.9%
Annualized change 2006-2030	-0.47%	-0.67%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	27	6.4
2015	28	6.4
2020	28	6.4
2025	28	6.4
2030	29	6.4
Percent change 2006-2030	6.3%	1.1%
Annualized change 2006-2030	0.25%	0.05%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	10	2.4
2015	10	2.4
2020	9	2.1
2025	9	2.1
2030	8	1.9
Percent change 2006-2030	-23.5%	-27.2%
Annualized change 2006-2030	-1.11%	-1.31%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	6	1.4
2020	7	1.5
2025	6	1.4
2030	6	1.3
Percent change 2006-2030	-18.1%	-22.1%
Annualized change 2006-2030	-0.83%	-1.04%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.3
2015	62	14.1
2020	61	13.9
2025	60	13.5
2030	59	13.2
Percent change 2006-2030	-1.9%	-6.7%
Annualized change 2006-2030	-0.08%	-0.29%

North Country Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 561 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	783	182.3
2015	805	184.8
2020	815	185.2
2025	816	183.7
2030	812	181.6
Percent change 2006-2030	7.6%	2.4%
Annualized change 2006-2030	0.31%	0.10%

Figure 562 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	281	65.4	2010	502	116.8
2015	286	65.7	2015	519	119.1
2020	286	65.0	2020	529	120.2
2025	282	63.4	2025	535	120.3
2030	275	61.4	2030	538	120.2
Percent change 2006-2030	1.3%	-3.6%	Percent change 2006-2030	11.1%	5.7%
Annualized change 2006-2030	0.05%	-0.15%	Annualized change 2006-2030	0.44%	0.23%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 563 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	281	65.4	2010	122	28.4
2015	286	65.7	2015	124	28.6
2020	286	65.0	2020	124	28.1
2025	282	63.4	2025	121	27.1
2030	275	61.4	2030	115	25.8
Percent change 2006-2030	1.3%	-3.6%	Percent change 2006-2030	-2.9%	-7.7%
Annualized change 2006-2030	0.05%	-0.15%	Annualized change 2006-2030	-0.12%	-0.33%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	106	24.7	2010	53	12.3
2015	108	24.7	2015	54	12.5
2020	107	24.4	2020	55	12.5
2025	106	23.8	2025	56	12.5
2030	103	23.1	2030	56	12.5
Percent change 2006-2030	2.1%	-2.8%	Percent change 2006-2030	9.6%	4.3%
Annualized change 2006-2030	0.09%	-0.12%	Annualized change 2006-2030	0.38%	0.18%

Non-Primary Care Specialties

Figure 564 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.1
2020	9	2.1
2025	10	2.2
2030	10	2.3
Percent change 2006-2030	27.4%	21.2%
Annualized change 2006-2030	1.02%	0.81%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.7
2015	60	13.7
2020	64	14.6
2025	68	15.3
2030	71	15.9
Percent change 2006-2030	39.7%	32.9%
Annualized change 2006-2030	1.40%	1.19%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	12.0
2015	52	12.0
2020	52	11.9
2025	52	11.7
2030	51	11.4
Percent change 2006-2030	2.2%	-2.7%
Annualized change 2006-2030	0.09%	-0.11%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.1
2015	13	2.9
2020	12	2.7
2025	11	2.5
2030	10	2.3
Percent change 2006-2030	-27.1%	-30.6%
Annualized change 2006-2030	-1.31%	-1.51%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	48	11.0
2020	46	10.4
2025	43	9.8
2030	41	9.2
Percent change 2006-2030	-17.4%	-21.4%
Annualized change 2006-2030	-0.79%	-1.00%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	7.9
2015	34	7.8
2020	35	8.0
2025	36	8.0
2030	35	7.9
Percent change 2006-2030	7.6%	2.3%
Annualized change 2006-2030	0.30%	0.10%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.5
2020	51	11.6
2025	52	11.6
2030	52	11.6
Percent change 2006-2030	15.7%	10.1%
Annualized change 2006-2030	0.61%	0.40%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	16.9
2015	81	18.7
2020	89	20.3
2025	96	21.5
2030	101	22.6
Percent change 2006-2030	53.0%	45.6%
Annualized change 2006-2030	1.79%	1.58%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	31	7.3
2015	33	7.5
2020	33	7.6
2025	34	7.6
2030	34	7.7
Percent change 2006-2030	14.1%	8.5%
Annualized change 2006-2030	0.55%	0.34%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.5
2015	19	4.3
2020	18	4.0
2025	17	3.7
2030	16	3.5
Percent change 2006-2030	-21.1%	-24.9%
Annualized change 2006-2030	-0.98%	-1.19%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	12	2.7
2025	11	2.6
2030	11	2.5
Percent change 2006-2030	-8.6%	-13.0%
Annualized change 2006-2030	-0.37%	-0.58%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.5
2015	28	6.5
2020	29	6.5
2025	29	6.5
2030	29	6.5
Percent change 2006-2030	7.4%	2.2%
Annualized change 2006-2030	0.30%	0.09%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	10	2.3
2020	10	2.2
2025	9	2.1
2030	9	1.9
Percent change 2006-2030	-21.0%	-24.8%
Annualized change 2006-2030	-0.98%	-1.18%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.5
2020	7	1.5
2025	6	1.4
2030	6	1.3
Percent change 2006-2030	-15.5%	-19.6%
Annualized change 2006-2030	-0.70%	-0.90%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.4
2015	63	14.4
2020	62	14.2
2025	61	13.8
2030	61	13.5
Percent change 2006-2030	0.9%	-4.0%
Annualized change 2006-2030	0.04%	-0.17%

North Country Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 565 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	780	181.5
2015	802	183.9
2020	808	183.4
2025	805	181.2
2030	800	178.8
Percent change 2006-2030	6.0%	0.8%
Annualized change 2006-2030	0.24%	0.03%

Figure 566 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	281	65.3	2010	500	116.3
2015	287	65.9	2015	514	118.0
2020	286	64.8	2020	522	118.6
2025	281	63.2	2025	524	118.0
2030	273	61.1	2030	527	117.8
Percent change 2006-2030	0.8%	-4.1%	Percent change 2006-2030	8.9%	3.6%
Annualized change 2006-2030	0.03%	-0.17%	Annualized change 2006-2030	0.35%	0.15%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 567 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	281	65.3	2010	122	28.5
2015	287	65.9	2015	125	28.7
2020	286	64.8	2020	123	28.0
2025	281	63.2	2025	121	27.2
2030	273	61.1	2030	116	25.9
Percent change 2006-2030	0.8%	-4.1%	Percent change 2006-2030	-2.5%	-7.3%
Annualized change 2006-2030	0.03%	-0.17%	Annualized change 2006-2030	-0.11%	-0.31%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	105	24.5	2010	53	12.3
2015	106	24.2	2015	57	13.0
2020	104	23.6	2020	58	13.2
2025	102	22.9	2025	58	13.1
2030	99	22.1	2030	58	13.1
Percent change 2006-2030	-2.3%	-7.0%	Percent change 2006-2030	14.7%	9.1%
Annualized change 2006-2030	-0.10%	-0.30%	Annualized change 2006-2030	0.57%	0.36%

Non-Primary Care Specialties

Figure 568 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.1
2020	9	2.1
2025	9	2.0
2030	10	2.2
Percent change 2006-2030	25.3%	19.2%
Annualized change 2006-2030	0.94%	0.73%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	54	12.6
2015	59	13.5
2020	63	14.3
2025	66	14.9
2030	69	15.3
Percent change 2006-2030	34.5%	28.0%
Annualized change 2006-2030	1.24%	1.03%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	11.9
2015	52	11.9
2020	51	11.5
2025	51	11.6
2030	51	11.3
Percent change 2006-2030	1.3%	-3.6%
Annualized change 2006-2030	0.06%	-0.15%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.0
2015	13	2.9
2020	12	2.6
2025	11	2.4
2030	10	2.1
Percent change 2006-2030	-31.4%	-34.7%
Annualized change 2006-2030	-1.56%	-1.76%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	47	10.8
2020	45	10.2
2025	42	9.4
2030	40	8.9
Percent change 2006-2030	-20.1%	-24.0%
Annualized change 2006-2030	-0.93%	-1.14%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	8.0
2015	34	7.8
2020	35	7.9
2025	35	7.8
2030	34	7.7
Percent change 2006-2030	4.4%	-0.7%
Annualized change 2006-2030	0.18%	-0.03%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.4
2020	51	11.5
2025	51	11.5
2030	51	11.4
Percent change 2006-2030	12.9%	7.4%
Annualized change 2006-2030	0.51%	0.30%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	17.0
2015	82	18.8
2020	90	20.4
2025	96	21.7
2030	102	22.9
Percent change 2006-2030	54.9%	47.4%
Annualized change 2006-2030	1.84%	1.63%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.4
2015	33	7.5
2020	33	7.5
2025	32	7.3
2030	33	7.4
Percent change 2006-2030	10.2%	4.8%
Annualized change 2006-2030	0.40%	0.20%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.4
2015	18	4.2
2020	17	3.9
2025	16	3.6
2030	15	3.4
Percent change 2006-2030	-23.0%	-26.8%
Annualized change 2006-2030	-1.08%	-1.29%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.7
2020	12	2.7
2025	11	2.5
2030	11	2.4
Percent change 2006-2030	-10.9%	-15.2%
Annualized change 2006-2030	-0.48%	-0.69%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	27	6.4
2015	28	6.4
2020	28	6.4
2025	28	6.4
2030	29	6.4
Percent change 2006-2030	5.9%	0.8%
Annualized change 2006-2030	0.24%	0.03%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	10	2.4
2015	10	2.4
2020	9	2.1
2025	9	2.1
2030	8	1.9
Percent change 2006-2030	-23.7%	-27.4%
Annualized change 2006-2030	-1.12%	-1.33%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	6	1.4
2020	7	1.5
2025	6	1.4
2030	6	1.3
Percent change 2006-2030	-18.4%	-22.3%
Annualized change 2006-2030	-0.84%	-1.05%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.3
2015	61	14.1
2020	61	13.9
2025	60	13.5
2030	59	13.1
Percent change 2006-2030	-2.2%	-7.0%
Annualized change 2006-2030	-0.09%	-0.30%

North Country Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 569 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	783	182.3
2015	805	184.8
2020	815	185.2
2025	816	183.7
2030	812	181.6
Percent change 2006-2030	7.6%	2.4%
Annualized change 2006-2030	0.31%	0.10%

Figure 570 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	281	65.4	2010	502	116.8
2015	287	65.8	2015	519	119.0
2020	287	65.1	2020	529	120.0
2025	283	63.6	2025	534	120.1
2030	276	61.6	2030	537	120.0
Percent change 2006-2030	1.7%	-3.2%	Percent change 2006-2030	10.9%	5.5%
Annualized change 2006-2030	0.07%	-0.14%	Annualized change 2006-2030	0.43%	0.22%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 571 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	281	65.4	2010	122	28.4
2015	287	65.8	2015	125	28.6
2020	287	65.1	2020	124	28.1
2025	283	63.6	2025	121	27.2
2030	276	61.6	2030	116	25.9
Percent change 2006-2030	1.7%	-3.2%	Percent change 2006-2030	-2.6%	-7.3%
Annualized change 2006-2030	0.07%	-0.14%	Annualized change 2006-2030	-0.11%	-0.32%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	106	24.7	2010	53	12.3
2015	108	24.7	2015	54	12.5
2020	108	24.4	2020	55	12.5
2025	106	23.9	2025	56	12.5
2030	104	23.1	2030	56	12.5
Percent change 2006-2030	2.5%	-2.5%	Percent change 2006-2030	10.0%	4.7%
Annualized change 2006-2030	0.10%	-0.10%	Annualized change 2006-2030	0.40%	0.19%

Non-Primary Care Specialties

Figure 572 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.1
2020	9	2.1
2025	10	2.2
2030	10	2.3
Percent change 2006-2030	27.2%	21.0%
Annualized change 2006-2030	1.01%	0.80%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	55	12.7
2015	60	13.7
2020	64	14.6
2025	68	15.3
2030	71	15.9
Percent change 2006-2030	39.5%	32.7%
Annualized change 2006-2030	1.40%	1.19%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	12.0
2015	52	12.0
2020	52	11.9
2025	52	11.7
2030	51	11.4
Percent change 2006-2030	2.0%	-2.9%
Annualized change 2006-2030	0.08%	-0.12%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.1
2015	13	2.9
2020	12	2.7
2025	11	2.5
2030	10	2.3
Percent change 2006-2030	-27.2%	-30.7%
Annualized change 2006-2030	-1.31%	-1.52%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	48	11.0
2020	46	10.4
2025	43	9.7
2030	41	9.2
Percent change 2006-2030	-17.5%	-21.5%
Annualized change 2006-2030	-0.80%	-1.00%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	7.9
2015	34	7.8
2020	35	8.0
2025	36	8.0
2030	35	7.9
Percent change 2006-2030	7.4%	2.1%
Annualized change 2006-2030	0.30%	0.09%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.5
2020	51	11.6
2025	52	11.6
2030	52	11.6
Percent change 2006-2030	15.5%	9.9%
Annualized change 2006-2030	0.60%	0.39%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	16.9
2015	81	18.7
2020	89	20.2
2025	96	21.5
2030	101	22.5
Percent change 2006-2030	52.7%	45.3%
Annualized change 2006-2030	1.78%	1.57%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	31	7.3
2015	33	7.5
2020	33	7.6
2025	34	7.6
2030	34	7.6
Percent change 2006-2030	13.9%	8.3%
Annualized change 2006-2030	0.54%	0.33%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.5
2015	19	4.3
2020	18	4.0
2025	17	3.7
2030	16	3.5
Percent change 2006-2030	-21.3%	-25.1%
Annualized change 2006-2030	-0.99%	-1.20%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	12	2.6
2025	11	2.6
2030	11	2.4
Percent change 2006-2030	-8.7%	-13.2%
Annualized change 2006-2030	-0.38%	-0.59%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	28	6.5
2015	28	6.5
2020	29	6.5
2025	29	6.5
2030	29	6.5
Percent change 2006-2030	7.2%	2.0%
Annualized change 2006-2030	0.29%	0.08%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	10	2.3
2020	10	2.2
2025	9	2.1
2030	9	1.9
Percent change 2006-2030	-21.1%	-24.9%
Annualized change 2006-2030	-0.98%	-1.19%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.5
2020	7	1.5
2025	6	1.4
2030	6	1.3
Percent change 2006-2030	-15.7%	-19.7%
Annualized change 2006-2030	-0.71%	-0.91%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.4
2015	63	14.4
2020	62	14.1
2025	61	13.8
2030	60	13.5
Percent change 2006-2030	0.7%	-4.1%
Annualized change 2006-2030	0.03%	-0.18%

North Country Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 573 – North Country Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	755	177.4
2010	780	181.5
2015	802	183.9
2020	808	183.4
2025	805	181.2
2030	800	178.8
Percent change 2006-2030	6.0%	0.8%
Annualized change 2006-2030	0.24%	0.03%

Figure 574 – North Country Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	281	65.3	2010	500	116.3
2015	288	66.0	2015	514	117.9
2020	286	65.0	2020	522	118.4
2025	282	63.4	2025	523	117.8
2030	274	61.3	2030	526	117.5
Percent change 2006-2030	1.2%	-3.7%	Percent change 2006-2030	8.6%	3.4%
Annualized change 2006-2030	0.05%	-0.16%	Annualized change 2006-2030	0.35%	0.14%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 575 – North Country Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	281	65.3	2010	122	28.5
2015	288	66.0	2015	125	28.7
2020	286	65.0	2020	123	28.0
2025	282	63.4	2025	121	27.3
2030	274	61.3	2030	116	26.0
Percent change 2006-2030	1.2%	-3.7%	Percent change 2006-2030	-2.2%	-6.9%
Annualized change 2006-2030	0.05%	-0.16%	Annualized change 2006-2030	-0.09%	-0.30%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	105	24.5	2010	53	12.3
2015	106	24.3	2015	57	13.0
2020	104	23.7	2020	58	13.3
2025	102	23.0	2025	58	13.1
2030	99	22.1	2030	59	13.1
Percent change 2006-2030	-1.9%	-6.7%	Percent change 2006-2030	15.1%	9.5%
Annualized change 2006-2030	-0.08%	-0.29%	Annualized change 2006-2030	0.59%	0.38%

Non-Primary Care Specialties

Figure 576 – North Country Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.1
2020	9	2.1
2025	9	2.0
2030	10	2.2
Percent change 2006-2030	25.1%	19.0%
Annualized change 2006-2030	0.94%	0.73%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	51	12.0
2010	54	12.6
2015	59	13.5
2020	63	14.3
2025	66	14.9
2030	68	15.3
Percent change 2006-2030	34.2%	27.7%
Annualized change 2006-2030	1.23%	1.02%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	51	11.9
2015	52	11.9
2020	51	11.5
2025	51	11.5
2030	51	11.3
Percent change 2006-2030	1.2%	-3.8%
Annualized change 2006-2030	0.05%	-0.16%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	14	3.3
2010	13	3.0
2015	13	2.9
2020	12	2.6
2025	11	2.4
2030	10	2.1
Percent change 2006-2030	-31.5%	-34.8%
Annualized change 2006-2030	-1.56%	-1.77%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	50	11.7
2010	49	11.5
2015	47	10.8
2020	45	10.2
2025	42	9.4
2030	40	8.9
Percent change 2006-2030	-20.2%	-24.1%
Annualized change 2006-2030	-0.94%	-1.14%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	33	7.8
2010	34	8.0
2015	34	7.8
2020	35	7.9
2025	35	7.8
2030	34	7.7
Percent change 2006-2030	4.2%	-0.9%
Annualized change 2006-2030	0.17%	-0.04%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	45	10.6
2010	48	11.2
2015	50	11.4
2020	51	11.5
2025	51	11.5
2030	51	11.3
Percent change 2006-2030	12.7%	7.2%
Annualized change 2006-2030	0.50%	0.29%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	66	15.5
2010	73	17.0
2015	82	18.8
2020	90	20.4
2025	96	21.7
2030	102	22.8
Percent change 2006-2030	54.6%	47.1%
Annualized change 2006-2030	1.83%	1.62%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	30	7.0
2010	32	7.4
2015	33	7.5
2020	33	7.5
2025	32	7.3
2030	33	7.4
Percent change 2006-2030	10.0%	4.6%
Annualized change 2006-2030	0.40%	0.19%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	20	4.7
2010	19	4.4
2015	18	4.2
2020	17	3.9
2025	16	3.6
2030	15	3.4
Percent change 2006-2030	-23.2%	-26.9%
Annualized change 2006-2030	-1.09%	-1.30%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.6
2020	12	2.7
2025	11	2.5
2030	11	2.4
Percent change 2006-2030	-11.1%	-15.4%
Annualized change 2006-2030	-0.49%	-0.69%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	27	6.3
2010	27	6.4
2015	28	6.4
2020	28	6.4
2025	28	6.4
2030	29	6.4
Percent change 2006-2030	5.7%	0.6%
Annualized change 2006-2030	0.23%	0.03%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	11	2.6
2010	10	2.4
2015	10	2.4
2020	9	2.1
2025	9	2.0
2030	8	1.9
Percent change 2006-2030	-23.9%	-27.6%
Annualized change 2006-2030	-1.13%	-1.33%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	6	1.4
2020	7	1.5
2025	6	1.4
2030	6	1.3
Percent change 2006-2030	-18.5%	-22.5%
Annualized change 2006-2030	-0.85%	-1.06%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	60	14.1
2010	62	14.3
2015	61	14.1
2020	61	13.8
2025	60	13.5
2030	59	13.1
Percent change 2006-2030	-2.4%	-7.2%
Annualized change 2006-2030	-0.10%	-0.31%

Southern Tier Physician Supply, 2006 – 2030
Southern Tier Supply Scenario 1: Baseline (Supply Not Responsive to Demand)

Figure 577 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,896	265.0
2015	1,956	275.1
2020	1,989	282.4
2025	1,999	287.4
2030	1,995	291.4
Percent change 2006-2030	9.3%	14.8%
Annualized change 2006-2030	0.37%	0.58%

Figure 578 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	712	99.6	2010	1,183	165.4
2015	728	102.4	2015	1,228	172.7
2020	731	103.8	2020	1,258	178.7
2025	722	103.8	2025	1,277	183.6
2030	705	103.0	2030	1,290	188.4
Percent change 2006-2030	3.0%	8.2%	Percent change 2006-2030	13.0%	18.7%
Annualized change 2006-2030	0.12%	0.33%	Annualized change 2006-2030	0.51%	0.72%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 579 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	712	99.6	2010	280	39.1
2015	728	102.4	2015	286	40.2
2020	731	103.8	2020	285	40.5
2025	722	103.8	2025	279	40.2
2030	705	103.0	2030	269	39.3
Percent change 2006-2030	3.0%	8.2%	Percent change 2006-2030	-1.2%	3.8%
Annualized change 2006-2030	0.12%	0.33%	Annualized change 2006-2030	-0.05%	0.16%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	337	47.2	2010	96	13.4
2015	344	48.3	2015	98	13.8
2020	345	49.0	2020	100	14.3
2025	341	49.0	2025	102	14.6
2030	334	48.8	2030	103	15.0
Percent change 2006-2030	4.0%	9.2%	Percent change 2006-2030	11.6%	17.3%
Annualized change 2006-2030	0.16%	0.37%	Annualized change 2006-2030	0.46%	0.67%

Non-Primary Care Specialties

Figure 580 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	57	7.9
2015	61	8.6
2020	65	9.2
2025	68	9.8
2030	71	10.3
Percent change 2006-2030	31.0%	37.6%
Annualized change 2006-2030	1.13%	1.34%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	161	22.5
2015	178	25.0
2020	192	27.3
2025	204	29.4
2030	215	31.5
Percent change 2006-2030	43.6%	50.9%
Annualized change 2006-2030	1.52%	1.73%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	93	13.0
2015	95	13.4
2020	96	13.6
2025	95	13.7
2030	95	13.8
Percent change 2006-2030	5.1%	10.4%
Annualized change 2006-2030	0.21%	0.41%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	31	4.3
2015	29	4.1
2020	27	3.9
2025	26	3.7
2030	24	3.5
Percent change 2006-2030	-25.0%	-21.3%
Annualized change 2006-2030	-1.19%	-0.99%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	104	14.5
2015	102	14.3
2020	98	13.9
2025	93	13.4
2030	89	13.0
Percent change 2006-2030	-15.0%	-10.7%
Annualized change 2006-2030	-0.68%	-0.47%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	96	13.5
2015	97	13.7
2020	101	14.3
2025	103	14.7
2030	103	15.0
Percent change 2006-2030	10.6%	16.2%
Annualized change 2006-2030	0.42%	0.63%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	125	17.5
2015	131	18.5
2020	135	19.2
2025	137	19.8
2030	139	20.3
Percent change 2006-2030	19.0%	25.0%
Annualized change 2006-2030	0.73%	0.93%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	98	13.7
2015	111	15.6
2020	122	17.3
2025	132	19.0
2030	140	20.4
Percent change 2006-2030	57.2%	65.2%
Annualized change 2006-2030	1.90%	2.11%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	82	11.5
2015	86	12.1
2020	88	12.5
2025	90	12.9
2030	91	13.4
Percent change 2006-2030	17.3%	23.2%
Annualized change 2006-2030	0.67%	0.87%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	45	6.3
2015	43	6.1
2020	41	5.9
2025	39	5.6
2030	37	5.4
Percent change 2006-2030	-18.9%	-14.8%
Annualized change 2006-2030	-0.87%	-0.67%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	19	2.7
2025	19	2.7
2030	18	2.6
Percent change 2006-2030	-6.0%	-1.3%
Annualized change 2006-2030	-0.26%	-0.05%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	53	7.4
2015	54	7.6
2020	55	7.8
2025	56	8.0
2030	56	8.2
Percent change 2006-2030	10.4%	16.0%
Annualized change 2006-2030	0.41%	0.62%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.8
2015	26	3.7
2020	25	3.5
2025	24	3.4
2030	23	3.3
Percent change 2006-2030	-18.8%	-14.7%
Annualized change 2006-2030	-0.86%	-0.66%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	47	6.5
2015	45	6.4
2020	44	6.3
2025	43	6.1
2030	41	6.0
Percent change 2006-2030	-13.1%	-8.7%
Annualized change 2006-2030	-0.59%	-0.38%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	147	20.5
2015	150	21.1
2020	150	21.3
2025	149	21.4
2030	147	21.5
Percent change 2006-2030	3.8%	9.0%
Annualized change 2006-2030	0.15%	0.36%

Southern Tier Supply Scenario 1: Baseline (Supply Responsive to Demand)

Figure 581 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,865	260.7
2015	1,887	265.4
2020	1,883	267.3
2025	1,860	267.5
2030	1,820	265.8
Percent change 2006-2030	-0.3%	4.7%
Annualized change 2006-2030	-0.01%	0.19%

Figure 582 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	701	98.0	2010	1,164	162.7
2015	704	99.0	2015	1,183	166.4
2020	692	98.3	2020	1,190	169.0
2025	672	96.6	2025	1,188	170.9
2030	643	93.9	2030	1,177	171.9
Percent change 2006-2030	-6.2%	-1.4%	Percent change 2006-2030	3.2%	8.4%
Annualized change 2006-2030	-0.27%	-0.06%	Annualized change 2006-2030	0.13%	0.34%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 583 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	701	98.0	2010	276	38.6
2015	704	99.0	2015	277	39.0
2020	692	98.3	2020	272	38.7
2025	672	96.6	2025	262	37.7
2030	643	93.9	2030	248	36.2
Percent change 2006-2030	-6.2%	-1.4%	Percent change 2006-2030	-8.9%	-4.3%
Annualized change 2006-2030	-0.27%	-0.06%	Annualized change 2006-2030	-0.39%	-0.18%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	330	46.2	2010	94	13.2
2015	329	46.2	2015	98	13.7
2020	321	45.6	2020	99	14.0
2025	311	44.7	2025	99	14.3
2030	297	43.4	2030	98	14.3
Percent change 2006-2030	-7.4%	-2.8%	Percent change 2006-2030	6.3%	11.6%
Annualized change 2006-2030	-0.32%	-0.12%	Annualized change 2006-2030	0.25%	0.46%

Non-Primary Care Specialties

Figure 584 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	56	7.8
2015	58	8.2
2020	60	8.6
2025	63	9.0
2030	64	9.3
Percent change 2006-2030	18.3%	24.3%
Annualized change 2006-2030	0.70%	0.91%

Other Internal Medicine Subspecialties

Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	157	22.0
2015	170	23.9
2020	181	25.6
2025	188	27.0
2030	195	28.5
Percent change 2006-2030	29.9%	36.5%
Annualized change 2006-2030	1.10%	1.30%

Obstetrics and Gynecology

Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	92	12.9
2015	93	13.1
2020	93	13.2
2025	90	13.0
2030	89	12.9
Percent change 2006-2030	-1.6%	3.4%
Annualized change 2006-2030	-0.07%	0.14%

Pathology

Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.2
2015	28	4.0
2020	26	3.7
2025	24	3.4
2030	22	3.2
Percent change 2006-2030	-32.1%	-28.7%
Annualized change 2006-2030	-1.60%	-1.40%

Psychiatry

Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	102	14.2
2015	98	13.8
2020	91	12.9
2025	85	12.3
2030	80	11.7
Percent change 2006-2030	-24.0%	-20.1%
Annualized change 2006-2030	-1.14%	-0.93%

Anesthesiology

Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	95	13.3
2015	94	13.2
2020	96	13.6
2025	96	13.7
2030	94	13.7
Percent change 2006-2030	1.2%	6.3%
Annualized change 2006-2030	0.05%	0.26%

Radiology

Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	123	17.2
2015	127	17.8
2020	128	18.2
2025	129	18.5
2030	128	18.6
Percent change 2006-2030	9.0%	14.5%
Annualized change 2006-2030	0.36%	0.57%

Emergency Medicine

Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	97	13.6
2015	108	15.2
2020	118	16.7
2025	125	18.0
2030	130	19.0
Percent change 2006-2030	46.4%	53.8%
Annualized change 2006-2030	1.60%	1.81%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	81	11.3
2015	83	11.6
2020	82	11.7
2025	83	12.0
2030	83	12.1
Percent change 2006-2030	6.3%	11.7%
Annualized change 2006-2030	0.26%	0.46%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	44	6.1
2015	41	5.8
2020	39	5.5
2025	37	5.3
2030	34	4.9
Percent change 2006-2030	-26.9%	-23.2%
Annualized change 2006-2030	-1.30%	-1.09%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.6
2015	18	2.6
2020	18	2.5
2025	18	2.6
2030	17	2.5
Percent change 2006-2030	-11.0%	-6.5%
Annualized change 2006-2030	-0.48%	-0.28%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	52	7.2
2015	52	7.4
2020	52	7.4
2025	52	7.5
2030	51	7.5
Percent change 2006-2030	0.4%	5.5%
Annualized change 2006-2030	0.02%	0.22%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.7
2015	25	3.5
2020	24	3.3
2025	22	3.2
2030	21	3.0
Percent change 2006-2030	-26.5%	-22.8%
Annualized change 2006-2030	-1.28%	-1.07%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	46	6.5
2015	44	6.2
2020	41	5.9
2025	39	5.6
2030	37	5.4
Percent change 2006-2030	-21.9%	-17.9%
Annualized change 2006-2030	-1.02%	-0.82%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	145	20.2
2015	144	20.3
2020	141	20.1
2025	138	19.8
2030	134	19.6
Percent change 2006-2030	-5.6%	-0.8%
Annualized change 2006-2030	-0.24%	-0.03%

Southern Tier Supply Scenario 2a: NP/PA High Growth (Supply Not Responsive to Demand)

Figure 585 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,935	270.5
2015	2,042	287.2
2020	2,123	301.5
2025	2,181	313.7
2030	2,231	325.9
Percent change 2006-2030	22.2%	28.3%
Annualized change 2006-2030	0.84%	1.05%

Figure 586 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	735	102.8	2010	1,199	167.7
2015	776	109.2	2015	1,266	178.0
2020	806	114.4	2020	1,317	187.1
2025	824	118.5	2025	1,357	195.2
2030	838	122.4	2030	1,393	203.5
Percent change 2006-2030	22.3%	28.5%	Percent change 2006-2030	22.1%	28.3%
Annualized change 2006-2030	0.84%	1.05%	Annualized change 2006-2030	0.84%	1.04%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 587 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	735	102.8	2010	289	40.3
2015	776	109.2	2015	305	42.9
2020	806	114.4	2020	315	44.7
2025	824	118.5	2025	319	45.9
2030	838	122.4	2030	319	46.6
Percent change 2006-2030	22.3%	28.5%	Percent change 2006-2030	17.4%	23.3%
Annualized change 2006-2030	0.84%	1.05%	Annualized change 2006-2030	0.67%	0.88%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	348	48.7	2010	99	13.8
2015	367	51.6	2015	105	14.8
2020	380	54.0	2020	111	15.7
2025	389	56.0	2025	116	16.7
2030	396	57.9	2030	122	17.8
Percent change 2006-2030	23.5%	29.7%	Percent change 2006-2030	32.6%	39.3%
Annualized change 2006-2030	0.88%	1.09%	Annualized change 2006-2030	1.18%	1.39%

Non-Primary Care Specialties

Figure 588 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	57	8.0
2015	63	8.9
2020	68	9.6
2025	72	10.4
2030	76	11.2
Percent change 2006-2030	41.5%	48.7%
Annualized change 2006-2030	1.46%	1.67%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	163	22.8
2015	183	25.8
2020	202	28.6
2025	217	31.2
2030	233	34.0
Percent change 2006-2030	55.2%	63.0%
Annualized change 2006-2030	1.85%	2.06%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	94	13.1
2015	98	13.8
2020	100	14.2
2025	101	14.6
2030	102	14.9
Percent change 2006-2030	13.5%	19.3%
Annualized change 2006-2030	0.53%	0.74%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	31	4.3
2015	30	4.2
2020	29	4.1
2025	27	3.9
2030	26	3.8
Percent change 2006-2030	-19.0%	-14.9%
Annualized change 2006-2030	-0.88%	-0.67%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	105	14.7
2015	105	14.8
2020	102	14.5
2025	99	14.2
2030	96	14.1
Percent change 2006-2030	-8.2%	-3.6%
Annualized change 2006-2030	-0.36%	-0.15%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	98	13.7
2015	100	14.1
2020	105	15.0
2025	109	15.7
2030	111	16.2
Percent change 2006-2030	19.4%	25.5%
Annualized change 2006-2030	0.74%	0.95%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	127	17.7
2015	135	19.0
2020	141	20.1
2025	146	21.0
2030	150	22.0
Percent change 2006-2030	28.5%	35.0%
Annualized change 2006-2030	1.05%	1.26%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	99	13.9
2015	114	16.1
2020	128	18.2
2025	140	20.2
2030	151	22.1
Percent change 2006-2030	69.9%	78.5%
Annualized change 2006-2030	2.23%	2.44%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	83	11.6
2015	89	12.5
2020	92	13.1
2025	96	13.7
2030	99	14.4
Percent change 2006-2030	26.7%	33.1%
Annualized change 2006-2030	0.99%	1.20%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	45	6.4
2015	44	6.3
2020	43	6.1
2025	42	6.0
2030	40	5.9
Percent change 2006-2030	-12.4%	-8.0%
Annualized change 2006-2030	-0.55%	-0.35%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	20	2.8
2020	20	2.8
2025	20	2.8
2030	19	2.8
Percent change 2006-2030	1.5%	6.6%
Annualized change 2006-2030	0.06%	0.27%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	54	7.5
2015	56	7.8
2020	58	8.2
2025	59	8.5
2030	61	8.9
Percent change 2006-2030	19.3%	25.3%
Annualized change 2006-2030	0.74%	0.94%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	28	3.9
2015	27	3.8
2020	26	3.7
2025	25	3.6
2030	25	3.6
Percent change 2006-2030	-12.2%	-7.8%
Annualized change 2006-2030	-0.54%	-0.34%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	47	6.6
2015	47	6.6
2020	46	6.6
2025	45	6.5
2030	44	6.4
Percent change 2006-2030	-6.2%	-1.4%
Annualized change 2006-2030	-0.26%	-0.06%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	149	20.8
2015	154	21.7
2020	157	22.3
2025	158	22.7
2030	159	23.2
Percent change 2006-2030	12.1%	17.7%
Annualized change 2006-2030	0.48%	0.68%

Southern Tier Supply Scenario 2a: NP/PA High Growth (Supply Responsive to Demand)

Figure 589 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,904	266.1
2015	1,971	277.2
2020	2,010	285.4
2025	2,029	291.7
2030	2,028	296.3
Percent change 2006-2030	11.1%	16.7%
Annualized change 2006-2030	0.44%	0.65%

Figure 590 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	721	100.8	2010	1,182	165.3
2015	748	105.2	2015	1,223	172.0
2020	759	107.7	2020	1,251	177.6
2025	759	109.2	2025	1,269	182.5
2030	750	109.6	2030	1,278	186.7
Percent change 2006-2030	9.5%	15.1%	Percent change 2006-2030	12.0%	17.7%
Annualized change 2006-2030	0.38%	0.59%	Annualized change 2006-2030	0.47%	0.68%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 591 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	721	100.8	2010	284	39.7
2015	748	105.2	2015	295	41.5
2020	759	107.7	2020	299	42.4
2025	759	109.2	2025	296	42.6
2030	750	109.6	2030	289	42.3
Percent change 2006-2030	9.5%	15.1%	Percent change 2006-2030	6.3%	11.7%
Annualized change 2006-2030	0.38%	0.59%	Annualized change 2006-2030	0.26%	0.46%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	340	47.5	2010	97	13.6
2015	349	49.1	2015	104	14.6
2020	352	50.0	2020	108	15.4
2025	351	50.4	2025	112	16.1
2030	347	50.7	2030	114	16.7
Percent change 2006-2030	8.1%	13.5%	Percent change 2006-2030	24.0%	30.3%
Annualized change 2006-2030	0.32%	0.53%	Annualized change 2006-2030	0.90%	1.11%

Non-Primary Care Specialties

Figure 592 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	57	7.9
2015	60	8.4
2020	63	9.0
2025	67	9.6
2030	69	10.1
Percent change 2006-2030	28.5%	35.0%
Annualized change 2006-2030	1.05%	1.26%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	160	22.3
2015	175	24.7
2020	190	26.9
2025	200	28.8
2030	212	30.9
Percent change 2006-2030	41.0%	48.2%
Annualized change 2006-2030	1.44%	1.65%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	93	13.1
2015	96	13.5
2020	97	13.8
2025	96	13.9
2030	96	14.0
Percent change 2006-2030	6.9%	12.3%
Annualized change 2006-2030	0.28%	0.48%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.2
2015	29	4.1
2020	27	3.9
2025	25	3.6
2030	24	3.4
Percent change 2006-2030	-26.3%	-22.5%
Annualized change 2006-2030	-1.26%	-1.06%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	103	14.4
2015	101	14.2
2020	96	13.6
2025	91	13.1
2030	87	12.7
Percent change 2006-2030	-17.4%	-13.3%
Annualized change 2006-2030	-0.80%	-0.59%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	97	13.5
2015	97	13.6
2020	101	14.3
2025	102	14.7
2030	102	14.9
Percent change 2006-2030	9.9%	15.4%
Annualized change 2006-2030	0.39%	0.60%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	125	17.4
2015	131	18.4
2020	135	19.1
2025	138	19.8
2030	138	20.2
Percent change 2006-2030	18.4%	24.3%
Annualized change 2006-2030	0.70%	0.91%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	99	13.8
2015	112	15.8
2020	124	17.6
2025	134	19.3
2030	141	20.7
Percent change 2006-2030	59.0%	67.0%
Annualized change 2006-2030	1.95%	2.16%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	82	11.5
2015	85	12.0
2020	87	12.3
2025	89	12.8
2030	90	13.2
Percent change 2006-2030	15.5%	21.3%
Annualized change 2006-2030	0.60%	0.81%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	44	6.2
2015	42	6.0
2020	41	5.8
2025	39	5.6
2030	37	5.3
Percent change 2006-2030	-20.6%	-16.6%
Annualized change 2006-2030	-0.96%	-0.75%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	18	2.6
2025	19	2.7
2030	18	2.7
Percent change 2006-2030	-3.3%	1.6%
Annualized change 2006-2030	-0.14%	0.06%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	53	7.4
2015	54	7.6
2020	55	7.8
2025	56	8.0
2030	56	8.1
Percent change 2006-2030	9.1%	14.6%
Annualized change 2006-2030	0.36%	0.57%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.8
2015	26	3.6
2020	25	3.5
2025	24	3.4
2030	22	3.3
Percent change 2006-2030	-20.2%	-16.2%
Annualized change 2006-2030	-0.94%	-0.73%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	47	6.6
2015	46	6.4
2020	44	6.2
2025	42	6.0
2030	40	5.8
Percent change 2006-2030	-15.2%	-10.9%
Annualized change 2006-2030	-0.68%	-0.48%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	147	20.5
2015	149	20.9
2020	149	21.1
2025	147	21.1
2030	146	21.3
Percent change 2006-2030	2.5%	7.7%
Annualized change 2006-2030	0.10%	0.31%

Southern Tier Supply Scenario 2b: NP/PA Lower Growth (Supply Not Responsive to Demand)

Figure 593 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,924	268.9
2015	2,004	281.9
2020	2,058	292.2
2025	2,089	300.4
2030	2,111	308.4
Percent change 2006-2030	15.6%	21.5%
Annualized change 2006-2030	0.61%	0.81%

Figure 594 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	730	102.0	2010	1,194	166.9
2015	757	106.4	2015	1,247	175.4
2020	772	109.6	2020	1,286	182.6
2025	776	111.6	2025	1,313	188.7
2030	776	113.3	2030	1,335	195.1
Percent change 2006-2030	13.2%	18.9%	Percent change 2006-2030	17.0%	23.0%
Annualized change 2006-2030	0.52%	0.73%	Annualized change 2006-2030	0.66%	0.86%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 595 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	730	102.0	2010	286	40.0
2015	757	106.4	2015	297	41.8
2020	772	109.6	2020	302	42.8
2025	776	111.6	2025	300	43.2
2030	776	113.3	2030	296	43.2
Percent change 2006-2030	13.2%	18.9%	Percent change 2006-2030	8.7%	14.2%
Annualized change 2006-2030	0.52%	0.73%	Annualized change 2006-2030	0.35%	0.55%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	346	48.3	2010	98	13.7
2015	357	50.2	2015	102	14.4
2020	364	51.7	2020	106	15.1
2025	367	52.7	2025	109	15.7
2030	367	53.6	2030	113	16.5
Percent change 2006-2030	14.3%	20.1%	Percent change 2006-2030	22.8%	29.0%
Annualized change 2006-2030	0.56%	0.77%	Annualized change 2006-2030	0.86%	1.07%

Non-Primary Care Specialties

Figure 596 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	57	8.0
2015	62	8.7
2020	66	9.4
2025	70	10.0
2030	73	10.7
Percent change 2006-2030	35.6%	42.5%
Annualized change 2006-2030	1.28%	1.49%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	162	22.7
2015	181	25.4
2020	197	27.9
2025	210	30.2
2030	223	32.6
Percent change 2006-2030	48.7%	56.2%
Annualized change 2006-2030	1.67%	1.88%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	93	13.1
2015	97	13.6
2020	98	13.9
2025	98	14.1
2030	98	14.3
Percent change 2006-2030	8.8%	14.3%
Annualized change 2006-2030	0.35%	0.56%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	31	4.3
2015	29	4.1
2020	28	4.0
2025	26	3.8
2030	25	3.6
Percent change 2006-2030	-22.4%	-18.5%
Annualized change 2006-2030	-1.05%	-0.85%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	105	14.6
2015	104	14.6
2020	100	14.2
2025	96	13.8
2030	92	13.5
Percent change 2006-2030	-12.0%	-7.6%
Annualized change 2006-2030	-0.53%	-0.33%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	97	13.6
2015	99	13.9
2020	103	14.6
2025	105	15.2
2030	106	15.6
Percent change 2006-2030	14.5%	20.3%
Annualized change 2006-2030	0.56%	0.77%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	126	17.6
2015	133	18.8
2020	138	19.6
2025	141	20.3
2030	144	21.1
Percent change 2006-2030	23.2%	29.4%
Annualized change 2006-2030	0.87%	1.08%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	99	13.8
2015	113	15.8
2020	125	17.7
2025	136	19.5
2030	145	21.2
Percent change 2006-2030	62.8%	71.1%
Annualized change 2006-2030	2.05%	2.26%

General Surgery		
Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	83	11.6
2015	87	12.3
2020	90	12.8
2025	92	13.3
2030	95	13.8
Percent change 2006-2030	21.4%	27.6%
Annualized change 2006-2030	0.81%	1.02%

Ophthalmology		
Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	45	6.3
2015	44	6.2
2020	42	6.0
2025	40	5.8
2030	39	5.6
Percent change 2006-2030	-16.0%	-11.8%
Annualized change 2006-2030	-0.73%	-0.52%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	19	2.7
2025	19	2.7
2030	18	2.7
Percent change 2006-2030	-2.7%	2.2%
Annualized change 2006-2030	-0.11%	0.09%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	53	7.4
2015	55	7.7
2020	56	8.0
2025	57	8.2
2030	58	8.5
Percent change 2006-2030	14.3%	20.1%
Annualized change 2006-2030	0.56%	0.77%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	28	3.8
2015	27	3.7
2020	25	3.6
2025	24	3.5
2030	24	3.4
Percent change 2006-2030	-15.9%	-11.6%
Annualized change 2006-2030	-0.72%	-0.51%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	47	6.6
2015	46	6.5
2020	45	6.4
2025	44	6.3
2030	42	6.2
Percent change 2006-2030	-10.1%	-5.5%
Annualized change 2006-2030	-0.44%	-0.24%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	148	20.7
2015	152	21.4
2020	153	21.8
2025	153	22.0
2030	153	22.3
Percent change 2006-2030	7.4%	12.9%
Annualized change 2006-2030	0.30%	0.51%

Southern Tier Supply Scenario 2b: NP/PA Lower Growth (Supply Responsive to Demand)

Figure 597 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,893	264.6
2015	1,934	272.0
2020	1,948	276.6
2025	1,943	279.3
2030	1,920	280.4
Percent change 2006-2030	5.1%	10.4%
Annualized change 2006-2030	0.21%	0.41%

Figure 598 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	716	100.1	2010	1,177	164.6
2015	729	102.5	2015	1,205	169.5
2020	727	103.2	2020	1,221	173.4
2025	715	102.8	2025	1,228	176.5
2030	695	101.5	2030	1,225	178.9
Percent change 2006-2030	1.4%	6.5%	Percent change 2006-2030	7.4%	12.8%
Annualized change 2006-2030	0.06%	0.26%	Annualized change 2006-2030	0.30%	0.50%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 599 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	716	100.1	2010	282	39.4
2015	729	102.5	2015	287	40.4
2020	727	103.2	2020	286	40.6
2025	715	102.8	2025	279	40.1
2030	695	101.5	2030	268	39.1
Percent change 2006-2030	1.4%	6.5%	Percent change 2006-2030	-1.5%	3.4%
Annualized change 2006-2030	0.06%	0.26%	Annualized change 2006-2030	-0.06%	0.14%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	337	47.2	2010	96	13.5
2015	340	47.9	2015	101	14.2
2020	337	47.9	2020	104	14.7
2025	330	47.5	2025	106	15.2
2030	321	46.9	2030	106	15.4
Percent change 2006-2030	0.1%	5.1%	Percent change 2006-2030	14.9%	20.7%
Annualized change 2006-2030	0.00%	0.21%	Annualized change 2006-2030	0.58%	0.79%

Non-Primary Care Specialties

Figure 600 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	56	7.9
2015	59	8.3
2020	62	8.8
2025	65	9.3
2030	66	9.7
Percent change 2006-2030	23.1%	29.4%
Annualized change 2006-2030	0.87%	1.08%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	159	22.2
2015	173	24.3
2020	185	26.3
2025	194	27.9
2030	203	29.6
Percent change 2006-2030	35.2%	42.0%
Annualized change 2006-2030	1.26%	1.47%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	93	13.0
2015	95	13.3
2020	95	13.5
2025	93	13.4
2030	92	13.5
Percent change 2006-2030	2.4%	7.6%
Annualized change 2006-2030	0.10%	0.31%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.2
2015	29	4.0
2020	27	3.8
2025	24	3.5
2030	23	3.3
Percent change 2006-2030	-29.3%	-25.7%
Annualized change 2006-2030	-1.44%	-1.23%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	103	14.4
2015	100	14.0
2020	93	13.3
2025	88	12.7
2030	83	12.1
Percent change 2006-2030	-20.9%	-16.9%
Annualized change 2006-2030	-0.97%	-0.77%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	96	13.5
2015	95	13.4
2020	98	14.0
2025	99	14.2
2030	98	14.3
Percent change 2006-2030	5.3%	10.7%
Annualized change 2006-2030	0.22%	0.42%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	124	17.3
2015	129	18.1
2020	131	18.7
2025	133	19.1
2030	133	19.4
Percent change 2006-2030	13.4%	19.2%
Annualized change 2006-2030	0.53%	0.73%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	98	13.7
2015	110	15.5
2020	121	17.1
2025	130	18.6
2030	136	19.8
Percent change 2006-2030	52.4%	60.1%
Annualized change 2006-2030	1.77%	1.98%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	82	11.4
2015	84	11.8
2020	85	12.0
2025	86	12.4
2030	86	12.6
Percent change 2006-2030	10.7%	16.3%
Annualized change 2006-2030	0.42%	0.63%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	44	6.2
2015	42	5.9
2020	40	5.7
2025	38	5.4
2030	35	5.1
Percent change 2006-2030	-23.9%	-20.1%
Annualized change 2006-2030	-1.13%	-0.93%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.6
2020	18	2.6
2025	18	2.6
2030	18	2.6
Percent change 2006-2030	-7.3%	-2.7%
Annualized change 2006-2030	-0.32%	-0.11%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	52	7.3
2015	53	7.5
2020	54	7.6
2025	54	7.7
2030	53	7.8
Percent change 2006-2030	4.5%	9.8%
Annualized change 2006-2030	0.19%	0.39%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.7
2015	26	3.6
2020	24	3.4
2025	23	3.3
2030	21	3.1
Percent change 2006-2030	-23.5%	-19.7%
Annualized change 2006-2030	-1.11%	-0.91%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	47	6.5
2015	45	6.3
2020	43	6.0
2025	41	5.8
2030	38	5.6
Percent change 2006-2030	-18.7%	-14.6%
Annualized change 2006-2030	-0.86%	-0.66%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	146	20.4
2015	147	20.6
2020	145	20.6
2025	142	20.4
2030	140	20.4
Percent change 2006-2030	-1.7%	3.3%
Annualized change 2006-2030	-0.07%	0.13%

Southern Tier Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 601 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,898	265.3
2015	1,970	277.1
2020	2,015	286.2
2025	2,037	293.0
2030	2,043	298.5
Percent change 2006-2030	11.9%	17.6%
Annualized change 2006-2030	0.47%	0.68%

Figure 602 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	713	99.7	2010	1,185	165.6
2015	733	103.1	2015	1,237	174.0
2020	740	105.0	2020	1,276	181.2
2025	735	105.7	2025	1,303	187.3
2030	721	105.4	2030	1,322	193.1
Percent change 2006-2030	5.3%	10.6%	Percent change 2006-2030	15.9%	21.7%
Annualized change 2006-2030	0.22%	0.42%	Annualized change 2006-2030	0.62%	0.82%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 603– Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	713	99.7	2010	280	39.1
2015	733	103.1	2015	288	40.5
2020	740	105.0	2020	289	41.0
2025	735	105.7	2025	284	40.9
2030	721	105.4	2030	275	40.2
Percent change 2006-2030	5.3%	10.6%	Percent change 2006-2030	1.1%	6.2%
Annualized change 2006-2030	0.22%	0.42%	Annualized change 2006-2030	0.04%	0.25%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	338	47.2	2010	96	13.4
2015	346	48.7	2015	99	13.9
2020	349	49.5	2020	102	14.4
2025	347	49.9	2025	103	14.9
2030	341	49.9	2030	105	15.3
Percent change 2006-2030	6.4%	11.7%	Percent change 2006-2030	14.2%	20.0%
Annualized change 2006-2030	0.26%	0.46%	Annualized change 2006-2030	0.55%	0.76%

Non-Primary Care Specialties

Figure 604 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	57	7.9
2015	62	8.7
2020	66	9.3
2025	69	9.9
2030	73	10.6
Percent change 2006-2030	34.3%	41.1%
Annualized change 2006-2030	1.24%	1.44%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	161	22.5
2015	179	25.2
2020	195	27.7
2025	209	30.0
2030	221	32.3
Percent change 2006-2030	47.2%	54.7%
Annualized change 2006-2030	1.62%	1.83%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	93	13.0
2015	96	13.5
2020	97	13.8
2025	97	14.0
2030	97	14.2
Percent change 2006-2030	7.7%	13.2%
Annualized change 2006-2030	0.31%	0.52%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	31	4.3
2015	29	4.1
2020	28	3.9
2025	26	3.8
2030	25	3.6
Percent change 2006-2030	-23.2%	-19.3%
Annualized change 2006-2030	-1.09%	-0.89%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	104	14.5
2015	103	14.4
2020	99	14.1
2025	95	13.7
2030	91	13.4
Percent change 2006-2030	-12.9%	-8.5%
Annualized change 2006-2030	-0.57%	-0.37%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	97	13.5
2015	98	13.8
2020	102	14.5
2025	105	15.0
2030	105	15.4
Percent change 2006-2030	13.3%	19.1%
Annualized change 2006-2030	0.52%	0.73%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	125	17.5
2015	132	18.6
2020	137	19.4
2025	140	20.2
2030	143	20.8
Percent change 2006-2030	21.9%	28.1%
Annualized change 2006-2030	0.83%	1.04%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	98	13.7
2015	112	15.7
2020	124	17.6
2025	135	19.4
2030	143	21.0
Percent change 2006-2030	61.2%	69.3%
Annualized change 2006-2030	2.01%	2.22%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	82	11.5
2015	87	12.2
2020	89	12.7
2025	92	13.2
2030	94	13.7
Percent change 2006-2030	20.2%	26.3%
Annualized change 2006-2030	0.77%	0.98%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	45	6.3
2015	43	6.1
2020	42	6.0
2025	40	5.7
2030	38	5.6
Percent change 2006-2030	-16.9%	-12.7%
Annualized change 2006-2030	-0.77%	-0.56%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	19	2.7
2025	19	2.7
2030	18	2.7
Percent change 2006-2030	-3.7%	1.2%
Annualized change 2006-2030	-0.16%	0.05%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	53	7.4
2015	54	7.7
2020	56	7.9
2025	57	8.2
2030	58	8.4
Percent change 2006-2030	13.2%	18.9%
Annualized change 2006-2030	0.52%	0.72%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.8
2015	26	3.7
2020	25	3.6
2025	24	3.5
2030	23	3.4
Percent change 2006-2030	-16.7%	-12.5%
Annualized change 2006-2030	-0.76%	-0.56%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	47	6.5
2015	46	6.4
2020	45	6.4
2025	44	6.3
2030	42	6.1
Percent change 2006-2030	-11.0%	-6.5%
Annualized change 2006-2030	-0.48%	-0.28%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	147	20.6
2015	151	21.2
2020	152	21.6
2025	152	21.8
2030	151	22.1
Percent change 2006-2030	6.3%	11.7%
Annualized change 2006-2030	0.26%	0.46%

Southern Tier Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 605 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,867	261.0
2015	1,900	267.2
2020	1,907	270.8
2025	1,896	272.6
2030	1,864	272.2
Percent change 2006-2030	2.1%	7.2%
Annualized change 2006-2030	0.08%	0.29%

Figure 606 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	702	98.1	2010	1,165	162.9
2015	708	99.6	2015	1,192	167.6
2020	700	99.5	2020	1,206	171.3
2025	684	98.3	2025	1,212	174.3
2030	657	96.0	2030	1,206	176.2
Percent change 2006-2030	-4.0%	0.8%	Percent change 2006-2030	5.7%	11.1%
Annualized change 2006-2030	-0.17%	0.03%	Annualized change 2006-2030	0.23%	0.44%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 607– Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	702	98.1	2010	277	38.7
2015	708	99.6	2015	279	39.3
2020	700	99.5	2020	276	39.1
2025	684	98.3	2025	267	38.4
2030	657	96.0	2030	253	37.0
Percent change 2006-2030	-4.0%	0.8%	Percent change 2006-2030	-6.8%	-2.1%
Annualized change 2006-2030	-0.17%	0.03%	Annualized change 2006-2030	-0.29%	-0.09%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	331	46.2	2010	94	13.2
2015	331	46.5	2015	98	13.8
2020	325	46.1	2020	100	14.2
2025	316	45.4	2025	101	14.5
2030	304	44.4	2030	100	14.6
Percent change 2006-2030	-5.3%	-0.5%	Percent change 2006-2030	8.7%	14.2%
Annualized change 2006-2030	-0.23%	-0.02%	Annualized change 2006-2030	0.35%	0.55%

Non-Primary Care Specialties

Figure 608 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	56	7.8
2015	59	8.2
2020	61	8.7
2025	64	9.2
2030	65	9.6
Percent change 2006-2030	21.3%	27.4%
Annualized change 2006-2030	0.81%	1.01%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	157	22.0
2015	171	24.0
2020	183	26.0
2025	191	27.5
2030	200	29.2
Percent change 2006-2030	33.1%	39.9%
Annualized change 2006-2030	1.20%	1.41%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	92	12.9
2015	94	13.2
2020	94	13.3
2025	92	13.2
2030	91	13.3
Percent change 2006-2030	0.9%	6.0%
Annualized change 2006-2030	0.04%	0.24%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.2
2015	28	4.0
2020	26	3.7
2025	24	3.5
2030	22	3.3
Percent change 2006-2030	-30.4%	-26.9%
Annualized change 2006-2030	-1.50%	-1.30%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	102	14.2
2015	99	13.9
2020	92	13.1
2025	87	12.5
2030	82	12.0
Percent change 2006-2030	-22.1%	-18.1%
Annualized change 2006-2030	-1.03%	-0.83%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	95	13.4
2015	94	13.3
2020	97	13.8
2025	97	14.0
2030	96	14.1
Percent change 2006-2030	3.7%	9.0%
Annualized change 2006-2030	0.15%	0.36%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	123	17.2
2015	128	17.9
2020	130	18.4
2025	131	18.9
2030	131	19.1
Percent change 2006-2030	11.7%	17.4%
Annualized change 2006-2030	0.46%	0.67%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	97	13.6
2015	109	15.4
2020	119	16.9
2025	128	18.4
2030	134	19.5
Percent change 2006-2030	50.1%	57.6%
Annualized change 2006-2030	1.71%	1.91%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	81	11.3
2015	83	11.7
2020	84	11.9
2025	85	12.2
2030	85	12.4
Percent change 2006-2030	9.0%	14.5%
Annualized change 2006-2030	0.36%	0.57%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	44	6.1
2015	41	5.8
2020	40	5.6
2025	37	5.4
2030	34	5.0
Percent change 2006-2030	-25.1%	-21.3%
Annualized change 2006-2030	-1.20%	-0.99%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.6
2015	19	2.6
2020	18	2.5
2025	18	2.6
2030	17	2.5
Percent change 2006-2030	-8.8%	-4.1%
Annualized change 2006-2030	-0.38%	-0.18%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	52	7.2
2015	53	7.4
2020	53	7.5
2025	53	7.6
2030	53	7.7
Percent change 2006-2030	2.9%	8.1%
Annualized change 2006-2030	0.12%	0.33%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.7
2015	25	3.6
2020	24	3.4
2025	23	3.3
2030	21	3.1
Percent change 2006-2030	-24.7%	-20.9%
Annualized change 2006-2030	-1.17%	-0.97%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	46	6.5
2015	45	6.3
2020	42	6.0
2025	40	5.8
2030	38	5.5
Percent change 2006-2030	-19.9%	-15.9%
Annualized change 2006-2030	-0.92%	-0.72%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	145	20.2
2015	145	20.4
2020	143	20.4
2025	140	20.2
2030	137	20.1
Percent change 2006-2030	-3.2%	1.7%
Annualized change 2006-2030	-0.14%	0.07%

Southern Tier Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 609 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,898	265.3
2015	1,970	277.1
2020	2,015	286.2
2025	2,037	293.0
2030	2,043	298.5
Percent change 2006-2030	11.9%	17.6%
Annualized change 2006-2030	0.47%	0.68%

Figure 610 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	713	99.7	2010	1,185	165.7
2015	732	102.9	2015	1,239	174.2
2020	737	104.7	2020	1,278	181.5
2025	732	105.2	2025	1,306	187.8
2030	717	104.8	2030	1,326	193.7
Percent change 2006-2030	4.7%	10.0%	Percent change 2006-2030	16.2%	22.1%
Annualized change 2006-2030	0.19%	0.40%	Annualized change 2006-2030	0.63%	0.84%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 611– Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	713	99.7	2010	280	39.1
2015	732	102.9	2015	287	40.4
2020	737	104.7	2020	288	40.9
2025	732	105.2	2025	283	40.7
2030	717	104.8	2030	273	39.9
Percent change 2006-2030	4.7%	10.0%	Percent change 2006-2030	0.5%	5.6%
Annualized change 2006-2030	0.19%	0.40%	Annualized change 2006-2030	0.02%	0.23%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	338	47.2	2010	96	13.4
2015	345	48.6	2015	99	13.9
2020	348	49.4	2020	101	14.4
2025	345	49.7	2025	103	14.8
2030	340	49.6	2030	104	15.3
Percent change 2006-2030	5.8%	11.1%	Percent change 2006-2030	13.6%	19.3%
Annualized change 2006-2030	0.23%	0.44%	Annualized change 2006-2030	0.53%	0.74%

Non-Primary Care Specialties

Figure 612 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	57	7.9
2015	62	8.7
2020	66	9.4
2025	69	10.0
2030	73	10.6
Percent change 2006-2030	34.7%	41.5%
Annualized change 2006-2030	1.25%	1.46%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	161	22.5
2015	179	25.2
2020	195	27.8
2025	209	30.1
2030	221	32.4
Percent change 2006-2030	47.7%	55.1%
Annualized change 2006-2030	1.64%	1.85%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	93	13.0
2015	96	13.5
2020	97	13.8
2025	98	14.0
2030	97	14.2
Percent change 2006-2030	8.0%	13.5%
Annualized change 2006-2030	0.32%	0.53%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	31	4.3
2015	29	4.1
2020	28	3.9
2025	26	3.8
2030	25	3.6
Percent change 2006-2030	-22.9%	-19.0%
Annualized change 2006-2030	-1.08%	-0.88%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	104	14.5
2015	103	14.5
2020	99	14.1
2025	95	13.7
2030	92	13.4
Percent change 2006-2030	-12.7%	-8.2%
Annualized change 2006-2030	-0.56%	-0.36%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	97	13.5
2015	98	13.8
2020	102	14.5
2025	105	15.1
2030	106	15.4
Percent change 2006-2030	13.7%	19.4%
Annualized change 2006-2030	0.54%	0.74%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	125	17.5
2015	132	18.6
2020	137	19.5
2025	140	20.2
2030	143	20.9
Percent change 2006-2030	22.3%	28.5%
Annualized change 2006-2030	0.84%	1.05%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	98	13.7
2015	112	15.7
2020	124	17.6
2025	135	19.4
2030	144	21.0
Percent change 2006-2030	61.7%	69.8%
Annualized change 2006-2030	2.02%	2.23%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	82	11.5
2015	87	12.2
2020	89	12.7
2025	92	13.2
2030	94	13.7
Percent change 2006-2030	20.6%	26.7%
Annualized change 2006-2030	0.78%	0.99%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	45	6.3
2015	44	6.1
2020	42	6.0
2025	40	5.8
2030	38	5.6
Percent change 2006-2030	-16.6%	-12.4%
Annualized change 2006-2030	-0.76%	-0.55%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	19	2.7
2025	19	2.7
2030	18	2.7
Percent change 2006-2030	-3.4%	1.5%
Annualized change 2006-2030	-0.14%	0.06%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	53	7.4
2015	55	7.7
2020	56	7.9
2025	57	8.2
2030	58	8.5
Percent change 2006-2030	13.5%	19.2%
Annualized change 2006-2030	0.53%	0.74%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.8
2015	26	3.7
2020	25	3.6
2025	24	3.5
2030	23	3.4
Percent change 2006-2030	-16.5%	-12.3%
Annualized change 2006-2030	-0.75%	-0.54%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	47	6.5
2015	46	6.5
2020	45	6.4
2025	44	6.3
2030	42	6.1
Percent change 2006-2030	-10.7%	-6.2%
Annualized change 2006-2030	-0.47%	-0.27%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	147	20.6
2015	151	21.3
2020	152	21.6
2025	152	21.9
2030	151	22.1
Percent change 2006-2030	6.7%	12.1%
Annualized change 2006-2030	0.27%	0.48%

Southern Tier Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 613 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,867	261.0
2015	1,900	267.2
2020	1,907	270.8
2025	1,896	272.6
2030	1,864	272.2
Percent change 2006-2030	2.1%	7.2%
Annualized change 2006-2030	0.08%	0.29%

Figure 614 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	702	98.1	2010	1,166	163.0
2015	707	99.4	2015	1,193	167.8
2020	698	99.2	2020	1,208	171.6
2025	681	97.9	2025	1,215	174.7
2030	654	95.5	2030	1,210	176.7
Percent change 2006-2030	-4.6%	0.3%	Percent change 2006-2030	6.0%	11.4%
Annualized change 2006-2030	-0.19%	0.01%	Annualized change 2006-2030	0.24%	0.45%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 615– Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	702	98.1	2010	276	38.7
2015	707	99.4	2015	279	39.2
2020	698	99.2	2020	275	39.0
2025	681	97.9	2025	266	38.2
2030	654	95.5	2030	252	36.8
Percent change 2006-2030	-4.6%	0.3%	Percent change 2006-2030	-7.3%	-2.7%
Annualized change 2006-2030	-0.19%	0.01%	Annualized change 2006-2030	-0.32%	-0.11%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	331	46.2	2010	94	13.2
2015	330	46.4	2015	98	13.8
2020	324	46.0	2020	100	14.1
2025	315	45.2	2025	100	14.5
2030	302	44.1	2030	99	14.5
Percent change 2006-2030	-5.9%	-1.1%	Percent change 2006-2030	8.1%	13.5%
Annualized change 2006-2030	-0.25%	-0.05%	Annualized change 2006-2030	0.32%	0.53%

Non-Primary Care Specialties

Figure 616 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	56	7.8
2015	59	8.2
2020	61	8.7
2025	64	9.2
2030	66	9.6
Percent change 2006-2030	21.6%	27.8%
Annualized change 2006-2030	0.82%	1.03%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	158	22.0
2015	171	24.1
2020	183	26.0
2025	192	27.6
2030	200	29.3
Percent change 2006-2030	33.5%	40.3%
Annualized change 2006-2030	1.21%	1.42%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	92	12.9
2015	94	13.2
2020	94	13.4
2025	92	13.3
2030	91	13.3
Percent change 2006-2030	1.2%	6.3%
Annualized change 2006-2030	0.05%	0.25%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.2
2015	28	4.0
2020	26	3.7
2025	24	3.5
2030	22	3.3
Percent change 2006-2030	-30.2%	-26.7%
Annualized change 2006-2030	-1.49%	-1.28%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	102	14.2
2015	99	13.9
2020	92	13.1
2025	87	12.5
2030	82	12.0
Percent change 2006-2030	-21.8%	-17.9%
Annualized change 2006-2030	-1.02%	-0.82%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	96	13.4
2015	94	13.3
2020	97	13.8
2025	98	14.1
2030	97	14.1
Percent change 2006-2030	4.0%	9.3%
Annualized change 2006-2030	0.16%	0.37%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	123	17.2
2015	128	18.0
2020	130	18.5
2025	132	18.9
2030	131	19.2
Percent change 2006-2030	12.1%	17.7%
Annualized change 2006-2030	0.48%	0.68%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	97	13.6
2015	109	15.4
2020	119	17.0
2025	128	18.4
2030	134	19.6
Percent change 2006-2030	50.5%	58.1%
Annualized change 2006-2030	1.72%	1.93%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	81	11.3
2015	83	11.7
2020	84	11.9
2025	85	12.3
2030	85	12.5
Percent change 2006-2030	9.3%	14.8%
Annualized change 2006-2030	0.37%	0.58%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	44	6.1
2015	41	5.8
2020	40	5.6
2025	37	5.4
2030	35	5.1
Percent change 2006-2030	-24.8%	-21.0%
Annualized change 2006-2030	-1.18%	-0.98%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.6
2015	19	2.6
2020	18	2.5
2025	18	2.6
2030	17	2.5
Percent change 2006-2030	-8.5%	-3.9%
Annualized change 2006-2030	-0.37%	-0.16%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	52	7.2
2015	53	7.4
2020	53	7.6
2025	53	7.6
2030	53	7.7
Percent change 2006-2030	3.3%	8.5%
Annualized change 2006-2030	0.13%	0.34%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.7
2015	25	3.6
2020	24	3.4
2025	23	3.3
2030	21	3.1
Percent change 2006-2030	-24.5%	-20.7%
Annualized change 2006-2030	-1.16%	-0.96%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	46	6.5
2015	45	6.3
2020	42	6.0
2025	40	5.8
2030	38	5.5
Percent change 2006-2030	-19.7%	-15.6%
Annualized change 2006-2030	-0.91%	-0.71%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	145	20.2
2015	145	20.4
2020	144	20.4
2025	141	20.2
2030	138	20.1
Percent change 2006-2030	-2.9%	2.0%
Annualized change 2006-2030	-0.12%	0.08%

Southern Tier Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 617 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,898	265.3
2015	1,970	277.1
2020	2,015	286.2
2025	2,037	293.0
2030	2,043	298.5
Percent change 2006-2030	11.9%	17.6%
Annualized change 2006-2030	0.47%	0.68%

Figure 618 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	713	99.7	2010	1,185	165.7
2015	731	102.8	2015	1,239	174.3
2020	736	104.5	2020	1,279	181.7
2025	730	104.9	2025	1,308	188.0
2030	715	104.5	2030	1,328	194.1
Percent change 2006-2030	4.4%	9.7%	Percent change 2006-2030	16.4%	22.3%
Annualized change 2006-2030	0.18%	0.38%	Annualized change 2006-2030	0.64%	0.84%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 619 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	713	99.7	2010	280	39.1
2015	731	102.8	2015	287	40.4
2020	736	104.5	2020	288	40.8
2025	730	104.9	2025	282	40.6
2030	715	104.5	2030	272	39.8
Percent change 2006-2030	4.4%	9.7%	Percent change 2006-2030	0.2%	5.2%
Annualized change 2006-2030	0.18%	0.38%	Annualized change 2006-2030	0.01%	0.21%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	338	47.2	2010	96	13.4
2015	345	48.5	2015	99	13.9
2020	347	49.3	2020	101	14.4
2025	345	49.5	2025	103	14.8
2030	338	49.4	2030	104	15.2
Percent change 2006-2030	5.4%	10.7%	Percent change 2006-2030	13.2%	18.9%
Annualized change 2006-2030	0.22%	0.43%	Annualized change 2006-2030	0.52%	0.72%

Non-Primary Care Specialties

Figure 620 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	57	7.9
2015	62	8.7
2020	66	9.4
2025	69	10.0
2030	73	10.6
Percent change 2006-2030	34.9%	41.7%
Annualized change 2006-2030	1.26%	1.46%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	161	22.5
2015	179	25.2
2020	196	27.8
2025	209	30.1
2030	222	32.4
Percent change 2006-2030	47.9%	55.4%
Annualized change 2006-2030	1.65%	1.85%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	93	13.0
2015	96	13.5
2020	97	13.8
2025	98	14.1
2030	97	14.2
Percent change 2006-2030	8.2%	13.7%
Annualized change 2006-2030	0.33%	0.54%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	31	4.3
2015	29	4.1
2020	28	4.0
2025	26	3.8
2030	25	3.6
Percent change 2006-2030	-22.8%	-18.9%
Annualized change 2006-2030	-1.07%	-0.87%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	104	14.5
2015	103	14.5
2020	99	14.1
2025	95	13.7
2030	92	13.4
Percent change 2006-2030	-12.5%	-8.1%
Annualized change 2006-2030	-0.55%	-0.35%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	97	13.5
2015	98	13.8
2020	102	14.5
2025	105	15.1
2030	106	15.5
Percent change 2006-2030	13.9%	19.6%
Annualized change 2006-2030	0.54%	0.75%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	125	17.5
2015	133	18.6
2020	137	19.5
2025	141	20.2
2030	143	20.9
Percent change 2006-2030	22.5%	28.7%
Annualized change 2006-2030	0.85%	1.06%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	98	13.7
2015	112	15.7
2020	124	17.6
2025	135	19.4
2030	144	21.1
Percent change 2006-2030	62.0%	70.2%
Annualized change 2006-2030	2.03%	2.24%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	82	11.5
2015	87	12.2
2020	89	12.7
2025	92	13.2
2030	94	13.8
Percent change 2006-2030	20.8%	26.9%
Annualized change 2006-2030	0.79%	1.00%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	45	6.3
2015	44	6.1
2020	42	6.0
2025	40	5.8
2030	38	5.6
Percent change 2006-2030	-16.5%	-12.3%
Annualized change 2006-2030	-0.75%	-0.54%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	19	2.7
2025	19	2.7
2030	18	2.7
Percent change 2006-2030	-3.2%	1.7%
Annualized change 2006-2030	-0.14%	0.07%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	53	7.4
2015	55	7.7
2020	56	7.9
2025	57	8.2
2030	58	8.5
Percent change 2006-2030	13.7%	19.5%
Annualized change 2006-2030	0.54%	0.74%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.8
2015	26	3.7
2020	25	3.6
2025	24	3.5
2030	23	3.4
Percent change 2006-2030	-16.3%	-12.1%
Annualized change 2006-2030	-0.74%	-0.54%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	47	6.5
2015	46	6.5
2020	45	6.4
2025	44	6.3
2030	42	6.1
Percent change 2006-2030	-10.5%	-6.0%
Annualized change 2006-2030	-0.46%	-0.26%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	147	20.6
2015	151	21.3
2020	152	21.7
2025	152	21.9
2030	152	22.2
Percent change 2006-2030	6.9%	12.3%
Annualized change 2006-2030	0.28%	0.48%

Southern Tier Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 621 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,867	261.0
2015	1,900	267.2
2020	1,907	270.8
2025	1,896	272.6
2030	1,864	272.2
Percent change 2006-2030	2.1%	7.2%
Annualized change 2006-2030	0.08%	0.29%

Figure 622 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	701	98.1	2010	1,166	163.0
2015	706	99.3	2015	1,194	167.9
2020	697	99.0	2020	1,210	171.8
2025	679	97.6	2025	1,217	174.9
2030	651	95.2	2030	1,212	177.1
Percent change 2006-2030	-4.9%	-0.1%	Percent change 2006-2030	6.2%	11.6%
Annualized change 2006-2030	-0.21%	0.00%	Annualized change 2006-2030	0.25%	0.46%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 623 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	701	98.1	2010	276	38.6
2015	706	99.3	2015	278	39.2
2020	697	99.0	2020	274	39.0
2025	679	97.6	2025	265	38.1
2030	651	95.2	2030	251	36.7
Percent change 2006-2030	-4.9%	-0.1%	Percent change 2006-2030	-7.7%	-3.0%
Annualized change 2006-2030	-0.21%	0.00%	Annualized change 2006-2030	-0.33%	-0.13%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	331	46.2	2010	94	13.2
2015	330	46.4	2015	98	13.8
2020	323	45.9	2020	99	14.1
2025	314	45.1	2025	100	14.4
2030	301	44.0	2030	99	14.5
Percent change 2006-2030	-6.2%	-1.4%	Percent change 2006-2030	7.7%	13.2%
Annualized change 2006-2030	-0.26%	-0.06%	Annualized change 2006-2030	0.31%	0.52%

Non-Primary Care Specialties

Figure 624 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	56	7.8
2015	59	8.2
2020	61	8.7
2025	64	9.2
2030	66	9.6
Percent change 2006-2030	21.8%	28.0%
Annualized change 2006-2030	0.83%	1.03%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	158	22.0
2015	171	24.1
2020	183	26.1
2025	192	27.6
2030	201	29.3
Percent change 2006-2030	33.8%	40.5%
Annualized change 2006-2030	1.22%	1.43%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	92	12.9
2015	94	13.2
2020	94	13.4
2025	92	13.3
2030	91	13.3
Percent change 2006-2030	1.3%	6.5%
Annualized change 2006-2030	0.06%	0.26%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.2
2015	28	4.0
2020	26	3.7
2025	24	3.5
2030	22	3.3
Percent change 2006-2030	-30.1%	-26.5%
Annualized change 2006-2030	-1.48%	-1.28%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	102	14.2
2015	99	13.9
2020	93	13.1
2025	87	12.6
2030	82	12.0
Percent change 2006-2030	-21.7%	-17.7%
Annualized change 2006-2030	-1.01%	-0.81%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	96	13.4
2015	94	13.3
2020	98	13.9
2025	98	14.1
2030	97	14.2
Percent change 2006-2030	4.2%	9.5%
Annualized change 2006-2030	0.17%	0.38%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	123	17.2
2015	128	18.0
2020	130	18.5
2025	132	19.0
2030	131	19.2
Percent change 2006-2030	12.3%	17.9%
Annualized change 2006-2030	0.48%	0.69%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	97	13.6
2015	109	15.4
2020	120	17.0
2025	128	18.5
2030	134	19.6
Percent change 2006-2030	50.8%	58.4%
Annualized change 2006-2030	1.73%	1.94%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	81	11.3
2015	83	11.7
2020	84	11.9
2025	85	12.3
2030	85	12.5
Percent change 2006-2030	9.5%	15.1%
Annualized change 2006-2030	0.38%	0.59%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	44	6.1
2015	41	5.8
2020	40	5.6
2025	37	5.4
2030	35	5.1
Percent change 2006-2030	-24.7%	-20.9%
Annualized change 2006-2030	-1.18%	-0.97%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.6
2015	19	2.6
2020	18	2.5
2025	18	2.6
2030	17	2.5
Percent change 2006-2030	-8.3%	-3.7%
Annualized change 2006-2030	-0.36%	-0.16%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	52	7.2
2015	53	7.4
2020	53	7.6
2025	53	7.7
2030	53	7.7
Percent change 2006-2030	3.4%	8.7%
Annualized change 2006-2030	0.14%	0.35%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.7
2015	25	3.6
2020	24	3.4
2025	23	3.3
2030	21	3.1
Percent change 2006-2030	-24.3%	-20.5%
Annualized change 2006-2030	-1.16%	-0.95%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	46	6.5
2015	45	6.3
2020	42	6.0
2025	40	5.8
2030	38	5.5
Percent change 2006-2030	-19.6%	-15.5%
Annualized change 2006-2030	-0.90%	-0.70%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	145	20.2
2015	145	20.4
2020	144	20.4
2025	141	20.3
2030	138	20.2
Percent change 2006-2030	-2.7%	2.2%
Annualized change 2006-2030	-0.12%	0.09%

Southern Tier Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 625 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,893	264.7
2015	1,941	273.0
2020	1,962	278.6
2025	1,960	281.8
2030	1,947	284.4
Percent change 2006-2030	6.6%	12.0%
Annualized change 2006-2030	0.27%	0.47%

Figure 626 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	712	99.5	2010	1,182	165.2
2015	723	101.7	2015	1,218	171.3
2020	722	102.5	2020	1,240	176.1
2025	709	102.0	2025	1,251	179.9
2030	689	100.7	2030	1,257	183.7
Percent change 2006-2030	0.6%	5.7%	Percent change 2006-2030	10.2%	15.8%
Annualized change 2006-2030	0.03%	0.23%	Annualized change 2006-2030	0.41%	0.61%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 627 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	712	99.5	2010	279	39.0
2015	723	101.7	2015	284	40.0
2020	722	102.5	2020	282	40.0
2025	709	102.0	2025	274	39.5
2030	689	100.7	2030	263	38.4
Percent change 2006-2030	0.6%	5.7%	Percent change 2006-2030	-3.4%	1.5%
Annualized change 2006-2030	0.03%	0.23%	Annualized change 2006-2030	-0.15%	0.06%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	337	47.1	2010	95	13.3
2015	341	48.0	2015	98	13.7
2020	341	48.4	2020	99	14.1
2025	335	48.1	2025	100	14.4
2030	326	47.7	2030	100	14.7
Percent change 2006-2030	1.6%	6.8%	Percent change 2006-2030	9.1%	14.6%
Annualized change 2006-2030	0.07%	0.27%	Annualized change 2006-2030	0.36%	0.57%

Non-Primary Care Specialties

Figure 628 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	57	7.9
2015	61	8.5
2020	64	9.1
2025	66	9.6
2030	69	10.1
Percent change 2006-2030	27.7%	34.2%
Annualized change 2006-2030	1.02%	1.23%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	161	22.5
2015	176	24.8
2020	190	26.9
2025	200	28.8
2030	210	30.7
Percent change 2006-2030	40.0%	47.1%
Annualized change 2006-2030	1.41%	1.62%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	93	12.9
2015	94	13.3
2020	94	13.4
2025	94	13.4
2030	92	13.5
Percent change 2006-2030	2.5%	7.6%
Annualized change 2006-2030	0.10%	0.31%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.3
2015	29	4.0
2020	27	3.8
2025	25	3.6
2030	23	3.4
Percent change 2006-2030	-26.9%	-23.2%
Annualized change 2006-2030	-1.30%	-1.10%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	103	14.5
2015	101	14.2
2020	96	13.7
2025	91	13.1
2030	87	12.7
Percent change 2006-2030	-17.2%	-13.0%
Annualized change 2006-2030	-0.78%	-0.58%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	96	13.5
2015	96	13.5
2020	99	14.1
2025	100	14.4
2030	100	14.6
Percent change 2006-2030	7.8%	13.2%
Annualized change 2006-2030	0.31%	0.52%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	125	17.5
2015	130	18.3
2020	133	18.9
2025	135	19.4
2030	136	19.8
Percent change 2006-2030	16.0%	21.8%
Annualized change 2006-2030	0.62%	0.83%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	98	13.7
2015	110	15.5
2020	120	17.1
2025	129	18.6
2030	136	19.9
Percent change 2006-2030	53.3%	61.1%
Annualized change 2006-2030	1.80%	2.01%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	82	11.4
2015	85	12.0
2020	87	12.3
2025	88	12.7
2030	89	13.0
Percent change 2006-2030	14.3%	20.1%
Annualized change 2006-2030	0.56%	0.77%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	45	6.3
2015	43	6.0
2020	41	5.8
2025	38	5.5
2030	36	5.3
Percent change 2006-2030	-20.9%	-16.9%
Annualized change 2006-2030	-0.97%	-0.77%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	19	2.6
2025	18	2.6
2030	17	2.5
Percent change 2006-2030	-8.4%	-3.7%
Annualized change 2006-2030	-0.36%	-0.16%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	53	7.4
2015	54	7.5
2020	54	7.7
2025	55	7.8
2030	55	8.0
Percent change 2006-2030	7.6%	13.1%
Annualized change 2006-2030	0.31%	0.51%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.8
2015	26	3.6
2020	24	3.5
2025	23	3.4
2030	22	3.2
Percent change 2006-2030	-20.8%	-16.8%
Annualized change 2006-2030	-0.97%	-0.76%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	46	6.5
2015	45	6.3
2020	44	6.2
2025	42	6.0
2030	40	5.8
Percent change 2006-2030	-15.3%	-11.0%
Annualized change 2006-2030	-0.69%	-0.49%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	147	20.5
2015	149	20.9
2020	148	21.0
2025	146	20.9
2030	144	21.0
Percent change 2006-2030	1.2%	6.3%
Annualized change 2006-2030	0.05%	0.25%

Southern Tier Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 629 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,863	260.4
2015	1,874	263.5
2020	1,858	263.9
2025	1,825	262.5
2030	1,776	259.4
Percent change 2006-2030	-2.8%	2.2%
Annualized change 2006-2030	-0.12%	0.09%

Figure 630 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	700	97.9	2010	1,163	162.5
2015	699	98.4	2015	1,174	165.2
2020	684	97.2	2020	1,174	166.7
2025	660	94.9	2025	1,165	167.5
2030	628	91.8	2030	1,148	167.7
Percent change 2006-2030	-8.3%	-3.7%	Percent change 2006-2030	0.6%	5.7%
Annualized change 2006-2030	-0.36%	-0.16%	Annualized change 2006-2030	0.02%	0.23%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 631 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	700	97.9	2010	276	38.6
2015	699	98.4	2015	276	38.8
2020	684	97.2	2020	269	38.2
2025	660	94.9	2025	258	37.1
2030	628	91.8	2030	242	35.4
Percent change 2006-2030	-8.3%	-3.7%	Percent change 2006-2030	-11.0%	-6.5%
Annualized change 2006-2030	-0.36%	-0.16%	Annualized change 2006-2030	-0.48%	-0.28%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	330	46.1	2010	94	13.2
2015	327	45.9	2015	97	13.6
2020	317	45.1	2020	98	13.9
2025	305	43.9	2025	97	14.0
2030	290	42.4	2030	96	14.0
Percent change 2006-2030	-9.5%	-5.0%	Percent change 2006-2030	3.8%	9.1%
Annualized change 2006-2030	-0.42%	-0.21%	Annualized change 2006-2030	0.16%	0.36%

Non-Primary Care Specialties

Figure 632 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	56	7.8
2015	58	8.1
2020	60	8.5
2025	61	8.8
2030	62	9.1
Percent change 2006-2030	15.4%	21.2%
Annualized change 2006-2030	0.60%	0.80%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	157	22.0
2015	168	23.7
2020	178	25.3
2025	184	26.5
2030	190	27.8
Percent change 2006-2030	26.7%	33.1%
Annualized change 2006-2030	0.99%	1.20%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	92	12.8
2015	92	13.0
2020	91	13.0
2025	89	12.7
2030	86	12.6
Percent change 2006-2030	-4.0%	0.8%
Annualized change 2006-2030	-0.17%	0.03%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.2
2015	28	3.9
2020	26	3.6
2025	23	3.3
2030	21	3.1
Percent change 2006-2030	-33.8%	-30.4%
Annualized change 2006-2030	-1.70%	-1.50%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	102	14.2
2015	97	13.7
2020	90	12.8
2025	84	12.0
2030	78	11.4
Percent change 2006-2030	-25.9%	-22.1%
Annualized change 2006-2030	-1.24%	-1.04%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	95	13.3
2015	93	13.1
2020	95	13.4
2025	94	13.5
2030	92	13.4
Percent change 2006-2030	-1.3%	3.7%
Annualized change 2006-2030	-0.06%	0.15%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	123	17.1
2015	126	17.7
2020	126	17.9
2025	126	18.2
2030	124	18.2
Percent change 2006-2030	6.3%	11.7%
Annualized change 2006-2030	0.25%	0.46%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	97	13.6
2015	108	15.1
2020	116	16.5
2025	123	17.7
2030	127	18.6
Percent change 2006-2030	42.8%	50.0%
Annualized change 2006-2030	1.49%	1.70%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	81	11.3
2015	82	11.5
2020	81	11.5
2025	82	11.8
2030	81	11.8
Percent change 2006-2030	3.7%	8.9%
Annualized change 2006-2030	0.15%	0.36%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	44	6.1
2015	41	5.7
2020	38	5.5
2025	36	5.1
2030	33	4.8
Percent change 2006-2030	-28.7%	-25.1%
Annualized change 2006-2030	-1.40%	-1.20%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.6
2015	18	2.6
2020	17	2.5
2025	17	2.5
2030	16	2.4
Percent change 2006-2030	-13.2%	-8.8%
Annualized change 2006-2030	-0.59%	-0.38%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	52	7.2
2015	52	7.3
2020	52	7.3
2025	51	7.3
2030	50	7.3
Percent change 2006-2030	-2.1%	2.9%
Annualized change 2006-2030	-0.09%	0.12%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	26	3.7
2015	25	3.5
2020	23	3.3
2025	22	3.1
2030	20	2.9
Percent change 2006-2030	-28.4%	-24.7%
Annualized change 2006-2030	-1.38%	-1.18%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	46	6.4
2015	44	6.2
2020	41	5.8
2025	39	5.5
2030	36	5.2
Percent change 2006-2030	-23.8%	-20.0%
Annualized change 2006-2030	-1.13%	-0.92%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	144	20.2
2015	143	20.1
2020	140	19.8
2025	135	19.4
2030	131	19.1
Percent change 2006-2030	-7.9%	-3.3%
Annualized change 2006-2030	-0.34%	-0.14%

Southern Tier Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 633 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,893	264.7
2015	1,941	273.0
2020	1,962	278.6
2025	1,960	281.8
2030	1,947	284.4
Percent change 2006-2030	6.6%	12.0%
Annualized change 2006-2030	0.27%	0.47%

Figure 634 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	712	99.5	2010	1,181	165.2
2015	724	101.9	2015	1,217	171.1
2020	724	102.8	2020	1,238	175.8
2025	712	102.4	2025	1,248	179.4
2030	693	101.3	2030	1,253	183.1
Percent change 2006-2030	1.2%	6.3%	Percent change 2006-2030	9.9%	15.4%
Annualized change 2006-2030	0.05%	0.26%	Annualized change 2006-2030	0.39%	0.60%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 635 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	712	99.5	2010	279	39.1
2015	724	101.9	2015	285	40.0
2020	724	102.8	2020	283	40.2
2025	712	102.4	2025	276	39.6
2030	693	101.3	2030	264	38.6
Percent change 2006-2030	1.2%	6.3%	Percent change 2006-2030	-2.9%	2.0%
Annualized change 2006-2030	0.05%	0.26%	Annualized change 2006-2030	-0.12%	0.08%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	337	47.1	2010	96	13.4
2015	342	48.1	2015	98	13.8
2020	342	48.5	2020	100	14.1
2025	336	48.4	2025	100	14.4
2030	328	47.9	2030	101	14.7
Percent change 2006-2030	2.2%	7.4%	Percent change 2006-2030	9.7%	15.3%
Annualized change 2006-2030	0.09%	0.30%	Annualized change 2006-2030	0.39%	0.59%

Non-Primary Care Specialties

Figure 636 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	56	7.9
2015	61	8.5
2020	64	9.1
2025	66	9.5
2030	69	10.0
Percent change 2006-2030	27.3%	33.7%
Annualized change 2006-2030	1.01%	1.22%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	161	22.5
2015	176	24.8
2020	189	26.9
2025	200	28.7
2030	209	30.6
Percent change 2006-2030	39.6%	46.6%
Annualized change 2006-2030	1.40%	1.61%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	92	12.9
2015	94	13.2
2020	94	13.4
2025	93	13.4
2030	92	13.4
Percent change 2006-2030	2.1%	7.3%
Annualized change 2006-2030	0.09%	0.29%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.3
2015	29	4.0
2020	27	3.8
2025	25	3.6
2030	23	3.4
Percent change 2006-2030	-27.2%	-23.5%
Annualized change 2006-2030	-1.31%	-1.11%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	103	14.5
2015	101	14.2
2020	96	13.7
2025	91	13.1
2030	87	12.7
Percent change 2006-2030	-17.4%	-13.3%
Annualized change 2006-2030	-0.80%	-0.59%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	96	13.5
2015	96	13.5
2020	99	14.1
2025	100	14.4
2030	100	14.6
Percent change 2006-2030	7.4%	12.9%
Annualized change 2006-2030	0.30%	0.51%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	125	17.5
2015	130	18.3
2020	133	18.9
2025	134	19.3
2030	135	19.8
Percent change 2006-2030	15.6%	21.5%
Annualized change 2006-2030	0.61%	0.81%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	98	13.7
2015	110	15.4
2020	120	17.1
2025	129	18.5
2030	136	19.9
Percent change 2006-2030	52.8%	60.6%
Annualized change 2006-2030	1.78%	1.99%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	82	11.4
2015	85	12.0
2020	87	12.3
2025	88	12.6
2030	89	13.0
Percent change 2006-2030	14.0%	19.7%
Annualized change 2006-2030	0.55%	0.75%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	45	6.3
2015	43	6.0
2020	41	5.8
2025	38	5.5
2030	36	5.3
Percent change 2006-2030	-21.2%	-17.2%
Annualized change 2006-2030	-0.99%	-0.78%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	18	2.6
2025	18	2.6
2030	17	2.5
Percent change 2006-2030	-8.7%	-4.1%
Annualized change 2006-2030	-0.38%	-0.17%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	53	7.4
2015	54	7.5
2020	54	7.7
2025	54	7.8
2030	55	8.0
Percent change 2006-2030	7.3%	12.7%
Annualized change 2006-2030	0.29%	0.50%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.8
2015	26	3.6
2020	24	3.5
2025	23	3.3
2030	22	3.2
Percent change 2006-2030	-21.0%	-17.1%
Annualized change 2006-2030	-0.98%	-0.78%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	46	6.5
2015	45	6.3
2020	44	6.2
2025	42	6.0
2030	40	5.8
Percent change 2006-2030	-15.6%	-11.3%
Annualized change 2006-2030	-0.70%	-0.50%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	147	20.5
2015	149	20.9
2020	148	21.0
2025	145	20.9
2030	143	20.9
Percent change 2006-2030	0.8%	5.9%
Annualized change 2006-2030	0.03%	0.24%

Southern Tier Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 637 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,863	260.4
2015	1,874	263.5
2020	1,858	263.9
2025	1,825	262.5
2030	1,776	259.4
Percent change 2006-2030	-2.8%	2.2%
Annualized change 2006-2030	-0.12%	0.09%

Figure 638 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	700	97.9	2010	1,162	162.5
2015	700	98.5	2015	1,173	165.0
2020	686	97.5	2020	1,172	166.5
2025	663	95.4	2025	1,162	167.1
2030	632	92.3	2030	1,144	167.1
Percent change 2006-2030	-7.8%	-3.1%	Percent change 2006-2030	0.3%	5.3%
Annualized change 2006-2030	-0.34%	-0.13%	Annualized change 2006-2030	0.01%	0.22%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 639 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	700	97.9	2010	276	38.6
2015	700	98.5	2015	276	38.8
2020	686	97.5	2020	270	38.4
2025	663	95.4	2025	259	37.2
2030	632	92.3	2030	244	35.6
Percent change 2006-2030	-7.8%	-3.1%	Percent change 2006-2030	-10.5%	-5.9%
Annualized change 2006-2030	-0.34%	-0.13%	Annualized change 2006-2030	-0.46%	-0.25%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	330	46.2	2010	94	13.2
2015	327	46.0	2015	97	13.7
2020	318	45.2	2020	98	13.9
2025	306	44.1	2025	98	14.1
2030	292	42.7	2030	96	14.0
Percent change 2006-2030	-9.0%	-4.4%	Percent change 2006-2030	4.4%	9.7%
Annualized change 2006-2030	-0.39%	-0.19%	Annualized change 2006-2030	0.18%	0.39%

Non-Primary Care Specialties

Figure 640 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	56	7.8
2015	58	8.1
2020	59	8.4
2025	61	8.8
2030	62	9.1
Percent change 2006-2030	15.0%	20.8%
Annualized change 2006-2030	0.58%	0.79%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	157	22.0
2015	168	23.7
2020	178	25.3
2025	184	26.4
2030	189	27.7
Percent change 2006-2030	26.3%	32.6%
Annualized change 2006-2030	0.98%	1.18%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	92	12.8
2015	92	13.0
2020	91	13.0
2025	88	12.7
2030	86	12.6
Percent change 2006-2030	-4.3%	0.5%
Annualized change 2006-2030	-0.18%	0.02%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.2
2015	28	3.9
2020	26	3.6
2025	23	3.3
2030	21	3.1
Percent change 2006-2030	-34.0%	-30.6%
Annualized change 2006-2030	-1.72%	-1.51%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	101	14.2
2015	97	13.6
2020	90	12.7
2025	83	12.0
2030	78	11.3
Percent change 2006-2030	-26.1%	-22.4%
Annualized change 2006-2030	-1.25%	-1.05%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	95	13.3
2015	93	13.1
2020	95	13.4
2025	93	13.4
2030	91	13.4
Percent change 2006-2030	-1.6%	3.3%
Annualized change 2006-2030	-0.07%	0.14%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	123	17.1
2015	126	17.7
2020	126	17.9
2025	126	18.1
2030	124	18.1
Percent change 2006-2030	6.0%	11.3%
Annualized change 2006-2030	0.24%	0.45%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	97	13.6
2015	107	15.1
2020	116	16.5
2025	123	17.6
2030	127	18.5
Percent change 2006-2030	42.3%	49.5%
Annualized change 2006-2030	1.48%	1.69%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	81	11.3
2015	82	11.5
2020	81	11.5
2025	82	11.7
2030	81	11.8
Percent change 2006-2030	3.4%	8.6%
Annualized change 2006-2030	0.14%	0.34%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	44	6.1
2015	41	5.7
2020	38	5.5
2025	36	5.1
2030	33	4.8
Percent change 2006-2030	-28.9%	-25.3%
Annualized change 2006-2030	-1.41%	-1.21%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.6
2015	18	2.6
2020	17	2.5
2025	17	2.5
2030	16	2.4
Percent change 2006-2030	-13.5%	-9.1%
Annualized change 2006-2030	-0.60%	-0.40%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	52	7.2
2015	52	7.3
2020	52	7.3
2025	51	7.3
2030	50	7.3
Percent change 2006-2030	-2.4%	2.6%
Annualized change 2006-2030	-0.10%	0.11%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	26	3.7
2015	25	3.5
2020	23	3.3
2025	22	3.1
2030	20	2.9
Percent change 2006-2030	-28.6%	-25.0%
Annualized change 2006-2030	-1.39%	-1.19%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	46	6.4
2015	44	6.2
2020	41	5.8
2025	38	5.5
2030	36	5.2
Percent change 2006-2030	-24.1%	-20.2%
Annualized change 2006-2030	-1.14%	-0.94%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	144	20.2
2015	143	20.1
2020	139	19.8
2025	135	19.3
2030	130	19.0
Percent change 2006-2030	-8.2%	-3.6%
Annualized change 2006-2030	-0.36%	-0.15%

Southern Tier Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 641 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,893	264.7
2015	1,941	273.0
2020	1,962	278.6
2025	1,960	281.8
2030	1,947	284.4
Percent change 2006-2030	6.6%	12.0%
Annualized change 2006-2030	0.27%	0.47%

Figure 642 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	712	99.5	2010	1,181	165.1
2015	725	102.0	2015	1,216	171.0
2020	725	103.0	2020	1,237	175.6
2025	714	102.7	2025	1,246	179.1
2030	696	101.6	2030	1,251	182.8
Percent change 2006-2030	1.6%	6.7%	Percent change 2006-2030	9.6%	15.2%
Annualized change 2006-2030	0.06%	0.27%	Annualized change 2006-2030	0.38%	0.59%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 643 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	712	99.5	2010	279	39.1
2015	725	102.0	2015	285	40.1
2020	725	103.0	2020	283	40.2
2025	714	102.7	2025	276	39.7
2030	696	101.6	2030	265	38.7
Percent change 2006-2030	1.6%	6.7%	Percent change 2006-2030	-2.5%	2.4%
Annualized change 2006-2030	0.06%	0.27%	Annualized change 2006-2030	-0.11%	0.10%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	337	47.1	2010	96	13.4
2015	342	48.1	2015	98	13.8
2020	342	48.6	2020	100	14.2
2025	337	48.5	2025	101	14.5
2030	329	48.1	2030	101	14.8
Percent change 2006-2030	2.6%	7.8%	Percent change 2006-2030	10.1%	15.7%
Annualized change 2006-2030	0.11%	0.31%	Annualized change 2006-2030	0.40%	0.61%

Non-Primary Care Specialties

Figure 644 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	56	7.9
2015	61	8.5
2020	64	9.1
2025	66	9.5
2030	69	10.0
Percent change 2006-2030	27.1%	33.5%
Annualized change 2006-2030	1.00%	1.21%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	161	22.5
2015	176	24.8
2020	189	26.9
2025	199	28.7
2030	209	30.5
Percent change 2006-2030	39.3%	46.4%
Annualized change 2006-2030	1.39%	1.60%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	92	12.9
2015	94	13.2
2020	94	13.4
2025	93	13.4
2030	92	13.4
Percent change 2006-2030	1.9%	7.1%
Annualized change 2006-2030	0.08%	0.29%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.3
2015	29	4.0
2020	27	3.8
2025	25	3.6
2030	23	3.4
Percent change 2006-2030	-27.3%	-23.6%
Annualized change 2006-2030	-1.32%	-1.12%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	103	14.5
2015	101	14.2
2020	96	13.6
2025	91	13.1
2030	87	12.6
Percent change 2006-2030	-17.6%	-13.4%
Annualized change 2006-2030	-0.80%	-0.60%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	96	13.5
2015	96	13.5
2020	99	14.0
2025	100	14.4
2030	100	14.6
Percent change 2006-2030	7.2%	12.7%
Annualized change 2006-2030	0.29%	0.50%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	125	17.5
2015	130	18.3
2020	133	18.8
2025	134	19.3
2030	135	19.7
Percent change 2006-2030	15.4%	21.2%
Annualized change 2006-2030	0.60%	0.81%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	98	13.7
2015	110	15.4
2020	120	17.1
2025	129	18.5
2030	136	19.8
Percent change 2006-2030	52.5%	60.2%
Annualized change 2006-2030	1.77%	1.98%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	82	11.4
2015	85	12.0
2020	86	12.3
2025	88	12.6
2030	89	13.0
Percent change 2006-2030	13.7%	19.5%
Annualized change 2006-2030	0.54%	0.74%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	45	6.3
2015	43	6.0
2020	41	5.8
2025	38	5.5
2030	36	5.3
Percent change 2006-2030	-21.3%	-17.4%
Annualized change 2006-2030	-1.00%	-0.79%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	18	2.6
2025	18	2.6
2030	17	2.5
Percent change 2006-2030	-8.8%	-4.2%
Annualized change 2006-2030	-0.39%	-0.18%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	53	7.4
2015	54	7.5
2020	54	7.7
2025	54	7.8
2030	55	8.0
Percent change 2006-2030	7.1%	12.5%
Annualized change 2006-2030	0.29%	0.49%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	27	3.8
2015	26	3.6
2020	24	3.5
2025	23	3.3
2030	22	3.2
Percent change 2006-2030	-21.2%	-17.2%
Annualized change 2006-2030	-0.99%	-0.78%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	46	6.5
2015	45	6.3
2020	44	6.2
2025	42	6.0
2030	40	5.8
Percent change 2006-2030	-15.7%	-11.5%
Annualized change 2006-2030	-0.71%	-0.51%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	147	20.5
2015	148	20.9
2020	147	20.9
2025	145	20.9
2030	143	20.9
Percent change 2006-2030	0.6%	5.7%
Annualized change 2006-2030	0.03%	0.23%

Southern Tier Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 645 – Southern Tier Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	1,826	253.9
2010	1,863	260.4
2015	1,874	263.5
2020	1,858	263.9
2025	1,825	262.5
2030	1,776	259.4
Percent change 2006-2030	-2.8%	2.2%
Annualized change 2006-2030	-0.12%	0.09%

Figure 646 – Southern Tier Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	701	97.9	2010	1,162	162.5
2015	701	98.6	2015	1,173	164.9
2020	687	97.6	2020	1,171	166.3
2025	665	95.6	2025	1,160	166.9
2030	634	92.6	2030	1,142	166.8
Percent change 2006-2030	-7.5%	-2.8%	Percent change 2006-2030	0.1%	5.1%
Annualized change 2006-2030	-0.32%	-0.12%	Annualized change 2006-2030	0.00%	0.21%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 647 – Southern Tier Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	701	97.9	2010	276	38.6
2015	701	98.6	2015	276	38.9
2020	687	97.6	2020	271	38.4
2025	665	95.6	2025	260	37.3
2030	634	92.6	2030	244	35.7
Percent change 2006-2030	-7.5%	-2.8%	Percent change 2006-2030	-10.1%	-5.6%
Annualized change 2006-2030	-0.32%	-0.12%	Annualized change 2006-2030	-0.44%	-0.24%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	330	46.2	2010	94	13.2
2015	327	46.0	2015	97	13.7
2020	319	45.3	2020	98	13.9
2025	307	44.2	2025	98	14.1
2030	293	42.8	2030	96	14.1
Percent change 2006-2030	-8.7%	-4.1%	Percent change 2006-2030	4.8%	10.1%
Annualized change 2006-2030	-0.38%	-0.17%	Annualized change 2006-2030	0.20%	0.40%

Non-Primary Care Specialties

Figure 648 – Southern Tier Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	54	7.5
2010	56	7.8
2015	58	8.1
2020	59	8.4
2025	61	8.8
2030	62	9.1
Percent change 2006-2030	14.8%	20.6%
Annualized change 2006-2030	0.58%	0.78%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	150	20.9
2010	157	22.0
2015	168	23.6
2020	178	25.2
2025	183	26.4
2030	189	27.6
Percent change 2006-2030	26.0%	32.4%
Annualized change 2006-2030	0.97%	1.18%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	90	12.5
2010	92	12.8
2015	92	13.0
2020	91	13.0
2025	88	12.7
2030	86	12.6
Percent change 2006-2030	-4.5%	0.3%
Annualized change 2006-2030	-0.19%	0.01%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	32	4.4
2010	30	4.2
2015	28	3.9
2020	26	3.6
2025	23	3.3
2030	21	3.1
Percent change 2006-2030	-34.1%	-30.8%
Annualized change 2006-2030	-1.72%	-1.52%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	105	14.6
2010	101	14.2
2015	97	13.6
2020	90	12.7
2025	83	12.0
2030	77	11.3
Percent change 2006-2030	-26.2%	-22.5%
Annualized change 2006-2030	-1.26%	-1.06%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	93	12.9
2010	95	13.3
2015	93	13.0
2020	94	13.4
2025	93	13.4
2030	91	13.3
Percent change 2006-2030	-1.8%	3.1%
Annualized change 2006-2030	-0.08%	0.13%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	117	16.3
2010	122	17.1
2015	125	17.6
2020	126	17.9
2025	126	18.1
2030	124	18.1
Percent change 2006-2030	5.8%	11.1%
Annualized change 2006-2030	0.23%	0.44%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	89	12.4
2010	97	13.6
2015	107	15.1
2020	116	16.4
2025	122	17.6
2030	126	18.5
Percent change 2006-2030	42.0%	49.2%
Annualized change 2006-2030	1.47%	1.68%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	78	10.8
2010	81	11.3
2015	82	11.5
2020	81	11.5
2025	82	11.7
2030	80	11.8
Percent change 2006-2030	3.2%	8.4%
Annualized change 2006-2030	0.13%	0.34%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	46	6.4
2010	44	6.1
2015	41	5.7
2020	38	5.5
2025	36	5.1
2030	33	4.8
Percent change 2006-2030	-29.1%	-25.5%
Annualized change 2006-2030	-1.42%	-1.22%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	19	2.6
2010	19	2.6
2015	18	2.6
2020	17	2.5
2025	17	2.5
2030	16	2.4
Percent change 2006-2030	-13.6%	-9.3%
Annualized change 2006-2030	-0.61%	-0.40%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	51	7.1
2010	52	7.2
2015	52	7.3
2020	52	7.3
2025	51	7.3
2030	50	7.3
Percent change 2006-2030	-2.5%	2.4%
Annualized change 2006-2030	-0.11%	0.10%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	28	3.9
2010	26	3.7
2015	25	3.5
2020	23	3.3
2025	22	3.1
2030	20	2.9
Percent change 2006-2030	-28.7%	-25.1%
Annualized change 2006-2030	-1.40%	-1.20%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	47	6.5
2010	46	6.4
2015	44	6.2
2020	41	5.8
2025	38	5.5
2030	36	5.2
Percent change 2006-2030	-24.2%	-20.4%
Annualized change 2006-2030	-1.15%	-0.95%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	142	19.7
2010	144	20.2
2015	143	20.1
2020	139	19.8
2025	134	19.3
2030	130	19.0
Percent change 2006-2030	-8.4%	-3.7%
Annualized change 2006-2030	-0.36%	-0.16%

Western New York Physician Supply, 2006 – 2030

Western New York Supply Scenario 1: Baseline (Supply Not Responsive to Demand)

Figure 649 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,118	294.3
2015	4,253	309.9
2020	4,333	322.3
2025	4,364	332.3
2030	4,368	342.0
Percent change 2006-2030	10.2%	22.5%
Annualized change 2006-2030	0.40%	0.85%

Figure 650 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,424	101.8	2010	2,694	192.6
2015	1,455	106.0	2015	2,798	203.8
2020	1,463	108.8	2020	2,870	213.5
2025	1,449	110.3	2025	2,915	222.0
2030	1,420	111.2	2030	2,947	230.8
Percent change 2006-2030	3.9%	15.5%	Percent change 2006-2030	13.4%	26.2%
Annualized change 2006-2030	0.16%	0.60%	Annualized change 2006-2030	0.53%	0.97%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 651 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,424	101.8	2010	434	31.0
2015	1,455	106.0	2015	444	32.3
2020	1,463	108.8	2020	443	32.9
2025	1,449	110.3	2025	433	33.0
2030	1,420	111.2	2030	417	32.7
Percent change 2006-2030	3.9%	15.5%	Percent change 2006-2030	-1.2%	9.9%
Annualized change 2006-2030	0.16%	0.60%	Annualized change 2006-2030	-0.05%	0.39%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	709	50.7	2010	281	20.1
2015	723	52.7	2015	289	21.0
2020	725	53.9	2020	295	21.9
2025	717	54.6	2025	298	22.7
2030	702	55.0	2030	301	23.6
Percent change 2006-2030	4.0%	15.6%	Percent change 2006-2030	11.6%	24.2%
Annualized change 2006-2030	0.16%	0.61%	Annualized change 2006-2030	0.46%	0.91%

Non-Primary Care Specialties

Figure 652 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	118	8.3
2010	124	8.8
2015	134	9.7
2020	142	10.5
2025	148	11.3
2030	155	12.1
Percent change 2006-2030	31.0%	45.7%
Annualized change 2006-2030	1.13%	1.58%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	429	30.2
2010	460	32.9
2015	508	37.0
2020	550	40.9
2025	585	44.5
2030	616	48.2
Percent change 2006-2030	43.6%	59.7%
Annualized change 2006-2030	1.52%	1.97%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	206	14.5
2010	212	15.2
2015	217	15.8
2020	219	16.3
2025	218	16.6
2030	216	17.0
Percent change 2006-2030	5.1%	16.9%
Annualized change 2006-2030	0.21%	0.65%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	109	7.7
2010	104	7.4
2015	99	7.2
2020	93	6.9
2025	88	6.7
2030	82	6.4
Percent change 2006-2030	-25.0%	-16.7%
Annualized change 2006-2030	-1.19%	-0.76%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	167	11.8
2010	165	11.8
2015	162	11.8
2020	155	11.6
2025	148	11.3
2030	142	11.1
Percent change 2006-2030	-15.0%	-5.5%
Annualized change 2006-2030	-0.68%	-0.24%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	192	13.5
2010	199	14.2
2015	200	14.6
2020	208	15.5
2025	212	16.1
2030	212	16.6
Percent change 2006-2030	10.6%	22.9%
Annualized change 2006-2030	0.42%	0.86%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	207	14.6
2010	221	15.8
2015	232	16.9
2020	239	17.8
2025	243	18.5
2030	246	19.3
Percent change 2006-2030	19.0%	32.3%
Annualized change 2006-2030	0.73%	1.17%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	168	11.8
2010	185	13.2
2015	209	15.2
2020	231	17.2
2025	249	19.0
2030	264	20.7
Percent change 2006-2030	57.2%	74.9%
Annualized change 2006-2030	1.90%	2.36%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	172	12.3
2015	181	13.2
2020	185	13.7
2025	189	14.4
2030	192	15.1
Percent change 2006-2030	17.3%	30.4%
Annualized change 2006-2030	0.67%	1.11%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	96	6.9
2015	93	6.8
2020	89	6.6
2025	84	6.4
2030	80	6.3
Percent change 2006-2030	-18.9%	-9.8%
Annualized change 2006-2030	-0.87%	-0.43%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	38	2.7
2015	38	2.8
2020	38	2.8
2025	37	2.8
2030	36	2.8
Percent change 2006-2030	-6.0%	4.5%
Annualized change 2006-2030	-0.26%	0.18%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	134	9.5
2015	137	10.0
2020	139	10.4
2025	141	10.7
2030	142	11.2
Percent change 2006-2030	10.4%	22.8%
Annualized change 2006-2030	0.41%	0.86%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	61	4.4
2015	59	4.3
2020	56	4.2
2025	54	4.1
2030	51	4.0
Percent change 2006-2030	-18.8%	-9.7%
Annualized change 2006-2030	-0.86%	-0.42%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	94	6.7
2015	92	6.7
2020	90	6.7
2025	86	6.6
2030	83	6.5
Percent change 2006-2030	-13.1%	-3.4%
Annualized change 2006-2030	-0.59%	-0.14%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	428	30.6
2015	437	31.8
2020	437	32.5
2025	433	33.0
2030	430	33.6
Percent change 2006-2030	3.8%	15.4%
Annualized change 2006-2030	0.15%	0.60%

Western New York Supply Scenario 1: Baseline (Supply Responsive to Demand)

Figure 653 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	3,995	285.5
2015	3,969	289.2
2020	3,906	290.5
2025	3,814	290.4
2030	3,694	289.2
Percent change 2006-2030	-6.8%	3.6%
Annualized change 2006-2030	-0.29%	0.15%

Figure 654 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,384	98.9	2010	2,611	186.6
2015	1,363	99.3	2015	2,606	189.9
2020	1,327	98.7	2020	2,580	191.9
2025	1,275	97.1	2025	2,538	193.3
2030	1,213	95.0	2030	2,481	194.3
Percent change 2006-2030	-11.3%	-1.3%	Percent change 2006-2030	-4.5%	6.2%
Annualized change 2006-2030	-0.50%	-0.06%	Annualized change 2006-2030	-0.19%	0.25%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 655 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,384	98.9	2010	424	30.3
2015	1,363	99.3	2015	420	30.6
2020	1,327	98.7	2020	409	30.4
2025	1,275	97.1	2025	391	29.7
2030	1,213	95.0	2030	367	28.7
Percent change 2006-2030	-11.3%	-1.3%	Percent change 2006-2030	-13.1%	-3.4%
Annualized change 2006-2030	-0.50%	-0.06%	Annualized change 2006-2030	-0.58%	-0.14%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	686	49.1	2010	274	19.5
2015	669	48.8	2015	273	19.9
2020	646	48.0	2020	272	20.2
2025	618	47.1	2025	266	20.3
2030	586	45.9	2030	261	20.4
Percent change 2006-2030	-13.2%	-3.5%	Percent change 2006-2030	-3.4%	7.4%
Annualized change 2006-2030	-0.59%	-0.15%	Annualized change 2006-2030	-0.15%	0.30%

Non-Primary Care Specialties

Figure 656 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	118	8.3
2010	120	8.5
2015	123	9.0
2020	126	9.4
2025	128	9.8
2030	129	10.1
Percent change 2006-2030	9.2%	21.4%
Annualized change 2006-2030	0.37%	0.81%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	429	30.2
2010	445	31.8
2015	471	34.3
2020	491	36.5
2025	506	38.5
2030	514	40.2
Percent change 2006-2030	19.8%	33.2%
Annualized change 2006-2030	0.76%	1.20%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	206	14.5
2010	207	14.8
2015	205	14.9
2020	199	14.8
2025	191	14.6
2030	183	14.4
Percent change 2006-2030	-11.0%	-1.0%
Annualized change 2006-2030	-0.48%	-0.04%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	109	7.7
2010	101	7.2
2015	92	6.7
2020	84	6.3
2025	76	5.8
2030	69	5.4
Percent change 2006-2030	-36.6%	-29.5%
Annualized change 2006-2030	-1.88%	-1.44%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	167	11.8
2010	160	11.4
2015	151	11.0
2020	138	10.3
2025	127	9.7
2030	117	9.2
Percent change 2006-2030	-29.9%	-22.1%
Annualized change 2006-2030	-1.47%	-1.03%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	192	13.5
2010	193	13.8
2015	186	13.6
2020	187	13.9
2025	185	14.1
2030	180	14.1
Percent change 2006-2030	-6.3%	4.2%
Annualized change 2006-2030	-0.27%	0.17%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	207	14.6
2010	215	15.4
2015	216	15.7
2020	214	15.9
2025	213	16.2
2030	209	16.4
Percent change 2006-2030	0.9%	12.2%
Annualized change 2006-2030	0.04%	0.48%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	168	11.8
2010	180	12.9
2015	197	14.4
2020	210	15.6
2025	220	16.7
2030	225	17.6
Percent change 2006-2030	34.0%	49.0%
Annualized change 2006-2030	1.23%	1.67%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	167	11.9
2015	168	12.3
2020	167	12.4
2025	165	12.6
2030	162	12.7
Percent change 2006-2030	-1.3%	9.8%
Annualized change 2006-2030	-0.05%	0.39%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	93	6.7
2015	86	6.2
2020	80	5.9
2025	73	5.6
2030	67	5.3
Percent change 2006-2030	-32.1%	-24.4%
Annualized change 2006-2030	-1.60%	-1.16%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	37	2.6
2015	36	2.6
2020	34	2.5
2025	32	2.4
2030	30	2.4
Percent change 2006-2030	-19.9%	-10.9%
Annualized change 2006-2030	-0.92%	-0.48%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	130	9.3
2015	128	9.3
2020	126	9.3
2025	123	9.4
2030	121	9.5
Percent change 2006-2030	-5.9%	4.7%
Annualized change 2006-2030	-0.25%	0.19%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	60	4.3
2015	55	4.0
2020	50	3.7
2025	47	3.6
2030	44	3.4
Percent change 2006-2030	-30.5%	-22.7%
Annualized change 2006-2030	-1.50%	-1.07%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	91	6.5
2015	86	6.2
2020	81	6.0
2025	75	5.7
2030	70	5.5
Percent change 2006-2030	-26.6%	-18.3%
Annualized change 2006-2030	-1.28%	-0.84%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	414	29.6
2015	406	29.6
2020	391	29.1
2025	376	28.6
2030	360	28.2
Percent change 2006-2030	-13.0%	-3.3%
Annualized change 2006-2030	-0.58%	-0.14%

Western New York Supply Scenario 2a: NP/PA High Growth (Supply Not Responsive to Demand)

Figure 657 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,198	300.1
2015	4,432	322.9
2020	4,607	342.7
2025	4,735	360.6
2030	4,844	379.3
Percent change 2006-2030	22.2%	35.8%
Annualized change 2006-2030	0.84%	1.28%

Figure 658 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,468	104.9	2010	2,731	195.2
2015	1,550	112.9	2015	2,882	210.0
2020	1,608	119.6	2020	3,000	223.1
2025	1,645	125.2	2025	3,090	235.3
2030	1,671	130.9	2030	3,172	248.4
Percent change 2006-2030	22.3%	36.0%	Percent change 2006-2030	22.1%	35.8%
Annualized change 2006-2030	0.84%	1.29%	Annualized change 2006-2030	0.84%	1.28%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 659 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,468	104.9	2010	447	32.0
2015	1,550	112.9	2015	472	34.4
2020	1,608	119.6	2020	487	36.2
2025	1,645	125.2	2025	492	37.5
2030	1,671	130.9	2030	491	38.4
Percent change 2006-2030	22.3%	36.0%	Percent change 2006-2030	16.3%	29.3%
Annualized change 2006-2030	0.84%	1.29%	Annualized change 2006-2030	0.63%	1.08%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	731	52.3	2010	289	20.7
2015	770	56.1	2015	308	22.4
2020	797	59.3	2020	324	24.1
2025	814	62.0	2025	339	25.8
2030	826	64.7	2030	355	27.8
Percent change 2006-2030	22.4%	36.1%	Percent change 2006-2030	31.4%	46.1%
Annualized change 2006-2030	0.84%	1.29%	Annualized change 2006-2030	1.14%	1.59%

Non-Primary Care Specialties

Figure 660 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	118	8.3
2010	125	9.0
2015	138	10.0
2020	148	11.0
2025	157	12.0
2030	166	13.0
Percent change 2006-2030	41.0%	56.8%
Annualized change 2006-2030	1.44%	1.89%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	429	30.2
2010	467	33.3
2015	524	38.1
2020	575	42.8
2025	620	47.2
2030	663	51.9
Percent change 2006-2030	54.6%	71.9%
Annualized change 2006-2030	1.83%	2.28%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	206	14.5
2010	215	15.4
2015	224	16.3
2020	229	17.0
2025	232	17.6
2030	233	18.2
Percent change 2006-2030	13.1%	25.8%
Annualized change 2006-2030	0.51%	0.96%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	109	7.7
2010	105	7.5
2015	102	7.4
2020	97	7.2
2025	93	7.1
2030	88	6.9
Percent change 2006-2030	-19.3%	-10.3%
Annualized change 2006-2030	-0.89%	-0.45%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	167	11.8
2010	167	11.9
2015	167	12.2
2020	162	12.1
2025	157	12.0
2030	153	12.0
Percent change 2006-2030	-8.6%	1.7%
Annualized change 2006-2030	-0.37%	0.07%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	192	13.5
2010	202	14.4
2015	206	15.0
2020	217	16.1
2025	224	17.1
2030	228	17.9
Percent change 2006-2030	19.0%	32.3%
Annualized change 2006-2030	0.73%	1.17%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	207	14.6
2010	224	16.0
2015	239	17.4
2020	249	18.6
2025	258	19.6
2030	265	20.8
Percent change 2006-2030	28.0%	42.4%
Annualized change 2006-2030	1.04%	1.48%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	168	11.8
2010	188	13.4
2015	215	15.7
2020	241	17.9
2025	264	20.1
2030	284	22.3
Percent change 2006-2030	69.2%	88.2%
Annualized change 2006-2030	2.22%	2.67%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	175	12.5
2015	186	13.6
2020	193	14.4
2025	200	15.3
2030	207	16.2
Percent change 2006-2030	26.2%	40.3%
Annualized change 2006-2030	0.97%	1.42%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	98	7.0
2015	96	7.0
2020	93	6.9
2025	89	6.8
2030	86	6.8
Percent change 2006-2030	-12.7%	-3.0%
Annualized change 2006-2030	-0.57%	-0.12%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	39	2.8
2015	39	2.9
2020	39	2.9
2025	39	3.0
2030	38	3.0
Percent change 2006-2030	1.1%	12.5%
Annualized change 2006-2030	0.05%	0.49%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	135	9.7
2015	141	10.3
2020	145	10.8
2025	149	11.4
2030	153	12.0
Percent change 2006-2030	18.8%	32.1%
Annualized change 2006-2030	0.72%	1.17%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	62	4.4
2015	60	4.4
2020	58	4.3
2025	57	4.3
2030	55	4.3
Percent change 2006-2030	-12.6%	-2.8%
Annualized change 2006-2030	-0.56%	-0.12%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	95	6.8
2015	95	6.9
2020	94	7.0
2025	92	7.0
2030	89	7.0
Percent change 2006-2030	-6.5%	4.0%
Annualized change 2006-2030	-0.28%	0.16%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	434	31.0
2015	450	32.8
2020	457	34.0
2025	459	35.0
2030	462	36.2
Percent change 2006-2030	11.7%	24.2%
Annualized change 2006-2030	0.46%	0.91%

Western New York Supply Scenario 2a: NP/PA High Growth (Supply Responsive to Demand)

Figure 661 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,076	291.3
2015	4,143	301.8
2020	4,165	309.8
2025	4,152	316.2
2030	4,110	321.8
Percent change 2006-2030	3.7%	15.3%
Annualized change 2006-2030	0.15%	0.59%

Figure 662 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,424	101.8	2010	2,652	189.5
2015	1,448	105.5	2015	2,694	196.3
2020	1,454	108.1	2020	2,711	201.6
2025	1,441	109.7	2025	2,711	206.4
2030	1,416	110.9	2030	2,694	210.9
Percent change 2006-2030	3.6%	15.2%	Percent change 2006-2030	3.7%	15.3%
Annualized change 2006-2030	0.15%	0.59%	Annualized change 2006-2030	0.15%	0.59%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 663 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,424	101.8	2010	436	31.2
2015	1,448	105.5	2015	447	32.5
2020	1,454	108.1	2020	448	33.3
2025	1,441	109.7	2025	441	33.6
2030	1,416	110.9	2030	428	33.5
Percent change 2006-2030	3.6%	15.2%	Percent change 2006-2030	1.5%	12.8%
Annualized change 2006-2030	0.15%	0.59%	Annualized change 2006-2030	0.06%	0.50%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	706	50.5	2010	281	20.1
2015	711	51.8	2015	290	21.2
2020	708	52.6	2020	298	22.2
2025	699	53.2	2025	301	22.9
2030	684	53.5	2030	304	23.8
Percent change 2006-2030	1.3%	12.6%	Percent change 2006-2030	12.7%	25.3%
Annualized change 2006-2030	0.05%	0.50%	Annualized change 2006-2030	0.50%	0.95%

Non-Primary Care Specialties

Figure 664 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	118	8.3	2006	429	30.2
2010	121	8.7	2010	452	32.3
2015	128	9.3	2015	487	35.5
2020	132	9.8	2020	516	38.4
2025	137	10.4	2025	540	41.1
2030	140	11.0	2030	558	43.7
Percent change 2006-2030	18.5%	31.8%	Percent change 2006-2030	30.1%	44.7%
Annualized change 2006-2030	0.71%	1.16%	Annualized change 2006-2030	1.10%	1.55%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	206	14.5	2006	109	7.7
2010	210	15.0	2010	102	7.3
2015	212	15.4	2015	95	7.0
2020	209	15.6	2020	88	6.6
2025	204	15.5	2025	81	6.2
2030	199	15.6	2030	75	5.9
Percent change 2006-2030	-3.3%	7.5%	Percent change 2006-2030	-31.1%	-23.4%
Annualized change 2006-2030	-0.14%	0.30%	Annualized change 2006-2030	-1.54%	-1.10%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	167	11.8	2006	192	13.5
2010	162	11.6	2010	196	14.0
2015	156	11.4	2015	192	14.0
2020	145	10.8	2020	197	14.6
2025	136	10.3	2025	198	15.1
2030	127	10.0	2030	195	15.3
Percent change 2006-2030	-23.9%	-15.4%	Percent change 2006-2030	1.7%	13.1%
Annualized change 2006-2030	-1.13%	-0.69%	Annualized change 2006-2030	0.07%	0.51%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	207	14.6	2006	168	11.8
2010	218	15.6	2010	183	13.1
2015	223	16.3	2015	204	14.9
2020	225	16.7	2020	221	16.4
2025	227	17.3	2025	235	17.9
2030	227	17.8	2030	244	19.1
Percent change 2006-2030	9.6%	21.8%	Percent change 2006-2030	45.5%	61.8%
Annualized change 2006-2030	0.38%	0.83%	Annualized change 2006-2030	1.57%	2.02%

General Surgery			Ophthalmology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	164	11.5	2006	99	7.0
2010	169	12.1	2010	95	6.8
2015	174	12.7	2015	89	6.5
2020	175	13.0	2020	84	6.2
2025	176	13.4	2025	78	5.9
2030	176	13.8	2030	73	5.7
Percent change 2006-2030	7.2%	19.2%	Percent change 2006-2030	-26.2%	-18.0%
Annualized change 2006-2030	0.29%	0.73%	Annualized change 2006-2030	-1.26%	-0.82%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	37	2.7
2015	37	2.7
2020	36	2.7
2025	34	2.6
2030	33	2.6
Percent change 2006-2030	-13.0%	-3.3%
Annualized change 2006-2030	-0.58%	-0.14%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	132	9.4
2015	132	9.6
2020	132	9.8
2025	132	10.0
2030	132	10.3
Percent change 2006-2030	2.2%	13.7%
Annualized change 2006-2030	0.09%	0.53%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	61	4.3
2015	56	4.1
2020	53	3.9
2025	51	3.8
2030	48	3.7
Percent change 2006-2030	-24.5%	-16.1%
Annualized change 2006-2030	-1.16%	-0.73%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	93	6.6
2015	89	6.5
2020	85	6.3
2025	81	6.1
2030	76	5.9
Percent change 2006-2030	-20.3%	-11.3%
Annualized change 2006-2030	-0.94%	-0.50%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	421	30.1
2015	420	30.6
2020	411	30.6
2025	401	30.5
2030	391	30.6
Percent change 2006-2030	-5.6%	5.0%
Annualized change 2006-2030	-0.24%	0.20%

Western New York Supply Scenario 2b: NP/PA Lower Growth (Supply Not Responsive to Demand)

Figure 665 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,175	298.4
2015	4,351	316.9
2020	4,468	332.3
2025	4,538	345.5
2030	4,588	359.3
Percent change 2006-2030	15.7%	28.7%
Annualized change 2006-2030	0.61%	1.06%

Figure 666 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,456	104.1	2010	2,719	194.3
2015	1,510	110.0	2015	2,840	206.9
2020	1,540	114.5	2020	2,928	217.8
2025	1,549	118.0	2025	2,989	227.6
2030	1,548	121.2	2030	3,041	238.1
Percent change 2006-2030	13.2%	25.9%	Percent change 2006-2030	17.0%	30.2%
Annualized change 2006-2030	0.52%	0.96%	Annualized change 2006-2030	0.66%	1.10%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 667 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,456	104.1	2010	444	31.7
2015	1,510	110.0	2015	460	33.5
2020	1,540	114.5	2020	466	34.7
2025	1,549	118.0	2025	463	35.3
2030	1,548	121.2	2030	454	35.6
Percent change 2006-2030	13.2%	25.9%	Percent change 2006-2030	7.7%	19.7%
Annualized change 2006-2030	0.52%	0.96%	Annualized change 2006-2030	0.31%	0.75%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	726	51.9	2010	287	20.5
2015	750	54.6	2015	300	21.8
2020	763	56.8	2020	310	23.1
2025	767	58.4	2025	319	24.3
2030	765	59.9	2030	328	25.7
Percent change 2006-2030	13.3%	26.0%	Percent change 2006-2030	21.7%	35.3%
Annualized change 2006-2030	0.52%	0.97%	Annualized change 2006-2030	0.82%	1.27%

Non-Primary Care Specialties

Figure 668 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physicians	Physicians per 100,000 Population
2006	118	8.3
2010	125	8.9
2015	136	9.9
2020	145	10.8
2025	152	11.6
2030	159	12.5
Percent change 2006-2030	35.1%	50.3%
Annualized change 2006-2030	1.26%	1.71%

Obstetrics and Gynecology

Year	Physicians	Physicians per 100,000 Population
2006	206	14.5
2010	214	15.3
2015	221	16.1
2020	224	16.6
2025	224	17.1
2030	223	17.5
Percent change 2006-2030	8.4%	20.6%
Annualized change 2006-2030	0.34%	0.78%

Psychiatry

Year	Physicians	Physicians per 100,000 Population
2006	167	11.8
2010	166	11.9
2015	165	12.0
2020	159	11.8
2025	152	11.6
2030	146	11.5
Percent change 2006-2030	-12.4%	-2.5%
Annualized change 2006-2030	-0.55%	-0.11%

Radiology

Year	Physicians	Physicians per 100,000 Population
2006	207	14.6
2010	223	16.0
2015	236	17.2
2020	244	18.1
2025	249	19.0
2030	254	19.9
Percent change 2006-2030	22.7%	36.5%
Annualized change 2006-2030	0.86%	1.30%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	174	12.4
2015	183	13.4
2020	189	14.0
2025	194	14.8
2030	198	15.5
Percent change 2006-2030	21.0%	34.5%
Annualized change 2006-2030	0.80%	1.24%

Other Internal Medicine Subspecialties

Year	Physicians	Physicians per 100,000 Population
2006	429	30.2
2010	465	33.2
2015	516	37.6
2020	561	41.8
2025	599	45.6
2030	636	49.8
Percent change 2006-2030	48.2%	64.8%
Annualized change 2006-2030	1.65%	2.10%

Pathology

Year	Physicians	Physicians per 100,000 Population
2006	109	7.7
2010	105	7.5
2015	100	7.3
2020	95	7.1
2025	90	6.8
2030	84	6.6
Percent change 2006-2030	-22.7%	-14.0%
Annualized change 2006-2030	-1.07%	-0.63%

Anesthesiology

Year	Physicians	Physicians per 100,000 Population
2006	192	13.5
2010	201	14.4
2015	203	14.8
2020	212	15.8
2025	217	16.5
2030	219	17.1
Percent change 2006-2030	14.1%	26.8%
Annualized change 2006-2030	0.55%	1.00%

Emergency Medicine

Year	Physicians	Physicians per 100,000 Population
2006	168	11.8
2010	187	13.3
2015	212	15.5
2020	235	17.5
2025	255	19.4
2030	273	21.3
Percent change 2006-2030	62.2%	80.4%
Annualized change 2006-2030	2.04%	2.49%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	97	7.0
2015	94	6.9
2020	91	6.8
2025	86	6.6
2030	83	6.5
Percent change 2006-2030	-16.4%	-7.0%
Annualized change 2006-2030	-0.74%	-0.30%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	38	2.7
2015	39	2.8
2020	38	2.8
2025	38	2.9
2030	37	2.9
Percent change 2006-2030	-3.1%	7.8%
Annualized change 2006-2030	-0.13%	0.31%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	135	9.6
2015	139	10.1
2020	142	10.6
2025	144	11.0
2030	147	11.5
Percent change 2006-2030	13.9%	26.6%
Annualized change 2006-2030	0.54%	0.99%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	62	4.4
2015	60	4.3
2020	57	4.2
2025	55	4.2
2030	53	4.1
Percent change 2006-2030	-16.2%	-6.8%
Annualized change 2006-2030	-0.73%	-0.29%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	95	6.8
2015	93	6.8
2020	92	6.8
2025	89	6.7
2030	85	6.7
Percent change 2006-2030	-10.4%	-0.4%
Annualized change 2006-2030	-0.46%	-0.01%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	432	30.9
2015	443	32.3
2020	446	33.2
2025	444	33.8
2030	443	34.7
Percent change 2006-2030	7.0%	19.0%
Annualized change 2006-2030	0.28%	0.73%

Western New York Supply Scenario 2b: NP/PA Lower Growth (Supply Responsive to Demand)

Figure 669 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,053	289.7
2015	4,067	296.3
2020	4,039	300.4
2025	3,979	303.0
2030	3,893	304.8
Percent change 2006-2030	-1.8%	9.2%
Annualized change 2006-2030	-0.08%	0.37%

Figure 670 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,413	101.0	2010	2,640	188.7
2015	1,412	102.8	2015	2,655	193.4
2020	1,393	103.6	2020	2,646	196.8
2025	1,357	103.3	2025	2,622	199.7
2030	1,311	102.7	2030	2,582	202.2
Percent change 2006-2030	-4.1%	6.7%	Percent change 2006-2030	-0.6%	10.5%
Annualized change 2006-2030	-0.17%	0.27%	Annualized change 2006-2030	-0.03%	0.42%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 671 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,413	101.0	2010	433	30.9
2015	1,412	102.8	2015	435	31.7
2020	1,393	103.6	2020	429	31.9
2025	1,357	103.3	2025	416	31.6
2030	1,311	102.7	2030	396	31.0
Percent change 2006-2030	-4.1%	6.7%	Percent change 2006-2030	-6.1%	4.5%
Annualized change 2006-2030	-0.17%	0.27%	Annualized change 2006-2030	-0.26%	0.18%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	701	50.1	2010	279	20.0
2015	693	50.5	2015	283	20.6
2020	678	50.4	2020	285	21.2
2025	658	50.1	2025	283	21.6
2030	633	49.6	2030	282	22.1
Percent change 2006-2030	-6.2%	4.3%	Percent change 2006-2030	4.4%	16.1%
Annualized change 2006-2030	-0.27%	0.17%	Annualized change 2006-2030	0.18%	0.62%

Non-Primary Care Specialties

Figure 672 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	118	8.3
2010	121	8.6
2015	126	9.2
2020	129	9.6
2025	133	10.1
2030	134	10.5
Percent change 2006-2030	13.6%	26.3%
Annualized change 2006-2030	0.53%	0.98%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	429	30.2
2010	450	32.1
2015	480	35.0
2020	504	37.5
2025	523	39.8
2030	535	41.9
Percent change 2006-2030	24.7%	38.7%
Annualized change 2006-2030	0.92%	1.37%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	206	14.5
2010	209	14.9
2015	209	15.2
2020	204	15.2
2025	197	15.0
2030	191	14.9
Percent change 2006-2030	-7.4%	3.0%
Annualized change 2006-2030	-0.32%	0.12%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	109	7.7
2010	102	7.3
2015	94	6.9
2020	86	6.4
2025	79	6.0
2030	72	5.6
Percent change 2006-2030	-34.0%	-26.6%
Annualized change 2006-2030	-1.71%	-1.28%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	167	11.8
2010	162	11.5
2015	154	11.2
2020	142	10.6
2025	131	10.0
2030	122	9.5
Percent change 2006-2030	-27.1%	-18.9%
Annualized change 2006-2030	-1.31%	-0.87%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	192	13.5
2010	195	13.9
2015	190	13.8
2020	192	14.3
2025	192	14.6
2030	187	14.7
Percent change 2006-2030	-2.5%	8.4%
Annualized change 2006-2030	-0.11%	0.34%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	207	14.6
2010	217	15.5
2015	220	16.0
2020	220	16.3
2025	220	16.7
2030	217	17.0
Percent change 2006-2030	5.0%	16.8%
Annualized change 2006-2030	0.20%	0.65%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	168	11.8
2010	182	13.0
2015	201	14.6
2020	216	16.0
2025	227	17.3
2030	234	18.3
Percent change 2006-2030	39.4%	55.1%
Annualized change 2006-2030	1.39%	1.84%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	169	12.1
2015	171	12.5
2020	171	12.7
2025	170	13.0
2030	169	13.2
Percent change 2006-2030	2.7%	14.3%
Annualized change 2006-2030	0.11%	0.56%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	94	6.7
2015	87	6.4
2020	82	6.1
2025	75	5.7
2030	70	5.5
Percent change 2006-2030	-29.3%	-21.4%
Annualized change 2006-2030	-1.43%	-1.00%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	37	2.6
2015	37	2.7
2020	35	2.6
2025	33	2.5
2030	32	2.5
Percent change 2006-2030	-16.6%	-7.3%
Annualized change 2006-2030	-0.75%	-0.31%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	131	9.4
2015	130	9.5
2020	129	9.6
2025	127	9.7
2030	126	9.9
Percent change 2006-2030	-2.0%	8.9%
Annualized change 2006-2030	-0.09%	0.36%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	60	4.3
2015	56	4.0
2020	51	3.8
2025	49	3.7
2030	46	3.6
Percent change 2006-2030	-27.6%	-19.5%
Annualized change 2006-2030	-1.34%	-0.90%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	92	6.6
2015	87	6.4
2020	83	6.2
2025	78	5.9
2030	73	5.7
Percent change 2006-2030	-23.6%	-15.0%
Annualized change 2006-2030	-1.11%	-0.68%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	419	30.0
2015	414	30.1
2020	401	29.9
2025	388	29.5
2030	375	29.3
Percent change 2006-2030	-9.5%	0.6%
Annualized change 2006-2030	-0.41%	0.03%

Western New York Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 673 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,123	294.7
2015	4,285	312.2
2020	4,391	326.6
2025	4,448	338.7
2030	4,473	350.2
Percent change 2006-2030	12.8%	25.4%
Annualized change 2006-2030	0.50%	0.95%

Figure 674 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,425	101.9	2010	2,698	192.8
2015	1,466	106.8	2015	2,819	205.4
2020	1,482	110.2	2020	2,909	216.3
2025	1,477	112.4	2025	2,971	226.2
2030	1,455	114.0	2030	3,017	236.3
Percent change 2006-2030	6.5%	18.4%	Percent change 2006-2030	16.1%	29.2%
Annualized change 2006-2030	0.26%	0.71%	Annualized change 2006-2030	0.63%	1.07%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 675– Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,425	101.9	2010	434	31.0
2015	1,466	106.8	2015	447	32.6
2020	1,482	110.2	2020	449	33.4
2025	1,477	112.4	2025	442	33.6
2030	1,455	114.0	2030	427	33.5
Percent change 2006-2030	6.5%	18.4%	Percent change 2006-2030	1.3%	12.6%
Annualized change 2006-2030	0.26%	0.71%	Annualized change 2006-2030	0.05%	0.50%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	710	50.8	2010	281	20.1
2015	728	53.0	2015	291	21.2
2020	734	54.6	2020	299	22.2
2025	731	55.6	2025	304	23.2
2030	719	56.3	2030	309	24.2
Percent change 2006-2030	6.6%	18.5%	Percent change 2006-2030	14.4%	27.2%
Annualized change 2006-2030	0.26%	0.71%	Annualized change 2006-2030	0.56%	1.01%

Non-Primary Care Specialties

Figure 676 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	118	8.3	2006	429	30.2
2010	124	8.8	2010	461	32.9
2015	135	9.8	2015	512	37.3
2020	144	10.7	2020	558	41.5
2025	151	11.5	2025	596	45.4
2030	158	12.4	2030	631	49.4
Percent change 2006-2030	34.1%	49.1%	Percent change 2006-2030	47.0%	63.5%
Annualized change 2006-2030	1.23%	1.68%	Annualized change 2006-2030	1.62%	2.07%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	206	14.5	2006	109	7.7
2010	212	15.2	2010	104	7.4
2015	219	16.0	2015	99	7.2
2020	222	16.5	2020	94	7.0
2025	223	17.0	2025	89	6.8
2030	222	17.4	2030	84	6.5
Percent change 2006-2030	7.6%	19.6%	Percent change 2006-2030	-23.3%	-14.7%
Annualized change 2006-2030	0.31%	0.75%	Annualized change 2006-2030	-1.10%	-0.66%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	167	11.8	2006	192	13.5
2010	165	11.8	2010	199	14.2
2015	163	11.9	2015	202	14.7
2020	157	11.7	2020	211	15.7
2025	151	11.5	2025	216	16.4
2030	145	11.4	2030	217	17.0
Percent change 2006-2030	-13.0%	-3.3%	Percent change 2006-2030	13.2%	25.9%
Annualized change 2006-2030	-0.58%	-0.14%	Annualized change 2006-2030	0.52%	0.96%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	207	14.6	2006	168	11.8
2010	222	15.8	2010	185	13.2
2015	234	17.1	2015	211	15.4
2020	242	18.0	2020	234	17.4
2025	248	18.9	2025	254	19.3
2030	252	19.7	2030	270	21.2
Percent change 2006-2030	21.8%	35.4%	Percent change 2006-2030	61.0%	79.0%
Annualized change 2006-2030	0.82%	1.27%	Annualized change 2006-2030	2.00%	2.46%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	173	12.3
2015	182	13.3
2020	187	13.9
2025	193	14.7
2030	197	15.4
Percent change 2006-2030	20.1%	33.5%
Annualized change 2006-2030	0.76%	1.21%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	97	6.9
2015	94	6.8
2020	90	6.7
2025	86	6.5
2030	82	6.4
Percent change 2006-2030	-17.0%	-7.7%
Annualized change 2006-2030	-0.77%	-0.33%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	38	2.7
2015	39	2.8
2020	38	2.8
2025	38	2.9
2030	37	2.9
Percent change 2006-2030	-3.8%	7.0%
Annualized change 2006-2030	-0.16%	0.28%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	134	9.6
2015	138	10.0
2020	141	10.5
2025	144	10.9
2030	146	11.4
Percent change 2006-2030	13.0%	25.7%
Annualized change 2006-2030	0.51%	0.96%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	61	4.4
2015	59	4.3
2020	57	4.2
2025	55	4.2
2030	52	4.1
Percent change 2006-2030	-16.8%	-7.5%
Annualized change 2006-2030	-0.76%	-0.32%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	94	6.7
2015	93	6.8
2020	91	6.8
2025	88	6.7
2030	84	6.6
Percent change 2006-2030	-11.1%	-1.1%
Annualized change 2006-2030	-0.49%	-0.05%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	429	30.6
2015	440	32.1
2020	443	32.9
2025	442	33.6
2030	440	34.4
Percent change 2006-2030	6.2%	18.1%
Annualized change 2006-2030	0.25%	0.70%

Western New York Supply Scenario 3a: Increase in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 677 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	3,999	285.8
2015	3,996	291.1
2020	3,955	294.2
2025	3,885	295.8
2030	3,783	296.2
Percent change 2006-2030	-4.6%	6.1%
Annualized change 2006-2030	-0.20%	0.25%

Figure 678 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,385	99.0	2010	2,614	186.8
2015	1,372	99.9	2015	2,624	191.2
2020	1,343	99.9	2020	2,612	194.3
2025	1,299	98.9	2025	2,586	196.9
2030	1,243	97.3	2030	2,540	198.9
Percent change 2006-2030	-9.1%	1.1%	Percent change 2006-2030	-2.2%	8.7%
Annualized change 2006-2030	-0.40%	0.05%	Annualized change 2006-2030	-0.09%	0.35%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 679– Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,385	99.0	2010	424	30.3
2015	1,372	99.9	2015	423	30.8
2020	1,343	99.9	2020	414	30.8
2025	1,299	98.9	2025	398	30.3
2030	1,243	97.3	2030	376	29.4
Percent change 2006-2030	-9.1%	1.1%	Percent change 2006-2030	-11.0%	-1.0%
Annualized change 2006-2030	-0.40%	0.05%	Annualized change 2006-2030	-0.48%	-0.04%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	687	49.1	2010	274	19.6
2015	674	49.1	2015	275	20.0
2020	654	48.6	2020	275	20.5
2025	630	48.0	2025	271	20.7
2030	600	47.0	2030	267	20.9
Percent change 2006-2030	-11.1%	-1.2%	Percent change 2006-2030	-1.1%	10.0%
Annualized change 2006-2030	-0.49%	-0.05%	Annualized change 2006-2030	-0.05%	0.40%

Non-Primary Care Specialties

Figure 680 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	118	8.3
2010	120	8.6
2015	124	9.1
2020	127	9.5
2025	131	10.0
2030	132	10.3
Percent change 2006-2030	11.8%	24.3%
Annualized change 2006-2030	0.47%	0.91%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	429	30.2
2010	445	31.8
2015	475	34.6
2020	498	37.0
2025	515	39.2
2030	526	41.2
Percent change 2006-2030	22.7%	36.4%
Annualized change 2006-2030	0.86%	1.30%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	206	14.5
2010	207	14.8
2015	206	15.0
2020	202	15.0
2025	195	14.8
2030	188	14.7
Percent change 2006-2030	-8.8%	1.4%
Annualized change 2006-2030	-0.39%	0.06%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	109	7.7
2010	101	7.2
2015	93	6.8
2020	85	6.3
2025	78	5.9
2030	71	5.5
Percent change 2006-2030	-35.0%	-27.8%
Annualized change 2006-2030	-1.78%	-1.35%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	167	11.8
2010	160	11.4
2015	152	11.1
2020	140	10.4
2025	130	9.9
2030	120	9.4
Percent change 2006-2030	-28.2%	-20.2%
Annualized change 2006-2030	-1.37%	-0.94%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	192	13.5
2010	193	13.8
2015	187	13.7
2020	189	14.1
2025	189	14.4
2030	184	14.4
Percent change 2006-2030	-4.1%	6.7%
Annualized change 2006-2030	-0.17%	0.27%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	207	14.6
2010	215	15.4
2015	217	15.8
2020	217	16.1
2025	217	16.5
2030	214	16.7
Percent change 2006-2030	3.3%	14.9%
Annualized change 2006-2030	0.14%	0.58%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	168	11.8
2010	180	12.9
2015	199	14.5
2020	213	15.8
2025	224	17.1
2030	230	18.0
Percent change 2006-2030	37.2%	52.5%
Annualized change 2006-2030	1.33%	1.78%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	167	11.9
2015	169	12.3
2020	169	12.6
2025	168	12.8
2030	166	13.0
Percent change 2006-2030	1.1%	12.4%
Annualized change 2006-2030	0.05%	0.49%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	93	6.7
2015	86	6.3
2020	81	6.0
2025	74	5.7
2030	69	5.4
Percent change 2006-2030	-30.4%	-22.6%
Annualized change 2006-2030	-1.50%	-1.06%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	37	2.6
2015	36	2.6
2020	35	2.6
2025	33	2.5
2030	31	2.4
Percent change 2006-2030	-18.0%	-8.8%
Annualized change 2006-2030	-0.82%	-0.38%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	130	9.3
2015	129	9.4
2020	127	9.5
2025	126	9.6
2030	124	9.7
Percent change 2006-2030	-3.6%	7.2%
Annualized change 2006-2030	-0.15%	0.29%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	60	4.3
2015	55	4.0
2020	51	3.8
2025	48	3.7
2030	45	3.5
Percent change 2006-2030	-28.8%	-20.8%
Annualized change 2006-2030	-1.41%	-0.97%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	92	6.5
2015	86	6.3
2020	82	6.1
2025	77	5.9
2030	71	5.6
Percent change 2006-2030	-24.8%	-16.4%
Annualized change 2006-2030	-1.18%	-0.74%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	415	29.7
2015	409	29.8
2020	396	29.5
2025	383	29.1
2030	369	28.9
Percent change 2006-2030	-11.0%	-1.0%
Annualized change 2006-2030	-0.48%	-0.04%

Western New York Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 681 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,123	294.7
2015	4,285	312.2
2020	4,391	326.6
2025	4,448	338.7
2030	4,473	350.2
Percent change 2006-2030	12.8%	25.4%
Annualized change 2006-2030	0.50%	0.95%

Figure 682 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,425	101.8	2010	2,698	192.8
2015	1,463	106.6	2015	2,822	205.6
2020	1,477	109.9	2020	2,914	216.7
2025	1,470	111.9	2025	2,978	226.8
2030	1,447	113.3	2030	3,026	237.0
Percent change 2006-2030	5.8%	17.7%	Percent change 2006-2030	16.5%	29.5%
Annualized change 2006-2030	0.24%	0.68%	Annualized change 2006-2030	0.64%	1.08%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 683– Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,425	101.8	2010	434	31.0
2015	1,463	106.6	2015	446	32.5
2020	1,477	109.9	2020	447	33.3
2025	1,470	111.9	2025	440	33.5
2030	1,447	113.3	2030	425	33.3
Percent change 2006-2030	5.8%	17.7%	Percent change 2006-2030	0.7%	11.9%
Annualized change 2006-2030	0.24%	0.68%	Annualized change 2006-2030	0.03%	0.47%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	710	50.7	2010	281	20.1
2015	727	52.9	2015	290	21.2
2020	732	54.4	2020	298	22.1
2025	727	55.4	2025	303	23.1
2030	715	56.0	2030	307	24.0
Percent change 2006-2030	5.9%	17.8%	Percent change 2006-2030	13.7%	26.4%
Annualized change 2006-2030	0.24%	0.68%	Annualized change 2006-2030	0.54%	0.98%

Non-Primary Care Specialties

Figure 684 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	118	8.3	2006	429	30.2
2010	124	8.8	2010	461	33.0
2015	135	9.8	2015	513	37.3
2020	144	10.7	2020	559	41.5
2025	151	11.5	2025	597	45.5
2030	159	12.4	2030	633	49.5
Percent change 2006-2030	34.5%	49.6%	Percent change 2006-2030	47.5%	64.0%
Annualized change 2006-2030	1.24%	1.69%	Annualized change 2006-2030	1.63%	2.08%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	206	14.5	2006	109	7.7
2010	212	15.2	2010	104	7.4
2015	219	16.0	2015	99	7.2
2020	223	16.6	2020	95	7.0
2025	223	17.0	2025	89	6.8
2030	222	17.4	2030	84	6.6
Percent change 2006-2030	7.9%	20.0%	Percent change 2006-2030	-23.0%	-14.4%
Annualized change 2006-2030	0.32%	0.76%	Annualized change 2006-2030	-1.09%	-0.65%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	167	11.8	2006	192	13.5
2010	165	11.8	2010	199	14.2
2015	163	11.9	2015	202	14.7
2020	158	11.7	2020	211	15.7
2025	151	11.5	2025	216	16.5
2030	146	11.4	2030	218	17.1
Percent change 2006-2030	-12.8%	-3.0%	Percent change 2006-2030	13.5%	26.2%
Annualized change 2006-2030	-0.57%	-0.13%	Annualized change 2006-2030	0.53%	0.98%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	207	14.6	2006	168	11.8
2010	222	15.8	2010	185	13.2
2015	234	17.1	2015	211	15.4
2020	242	18.0	2020	234	17.4
2025	248	18.9	2025	255	19.4
2030	253	19.8	2030	271	21.2
Percent change 2006-2030	22.1%	35.8%	Percent change 2006-2030	61.5%	79.5%
Annualized change 2006-2030	0.84%	1.28%	Annualized change 2006-2030	2.02%	2.47%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	173	12.3
2015	182	13.3
2020	188	14.0
2025	193	14.7
2030	197	15.5
Percent change 2006-2030	20.4%	33.9%
Annualized change 2006-2030	0.78%	1.22%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	97	6.9
2015	94	6.8
2020	90	6.7
2025	86	6.5
2030	82	6.5
Percent change 2006-2030	-16.7%	-7.4%
Annualized change 2006-2030	-0.76%	-0.32%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	38	2.7
2015	39	2.8
2020	38	2.8
2025	38	2.9
2030	37	2.9
Percent change 2006-2030	-3.5%	7.3%
Annualized change 2006-2030	-0.15%	0.29%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	134	9.6
2015	138	10.0
2020	141	10.5
2025	144	11.0
2030	146	11.4
Percent change 2006-2030	13.3%	26.0%
Annualized change 2006-2030	0.52%	0.97%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	61	4.4
2015	59	4.3
2020	57	4.2
2025	55	4.2
2030	53	4.1
Percent change 2006-2030	-16.6%	-7.2%
Annualized change 2006-2030	-0.75%	-0.31%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	94	6.7
2015	93	6.8
2020	91	6.8
2025	88	6.7
2030	85	6.6
Percent change 2006-2030	-10.8%	-0.8%
Annualized change 2006-2030	-0.48%	-0.03%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	429	30.6
2015	441	32.1
2020	444	33.0
2025	443	33.7
2030	441	34.5
Percent change 2006-2030	6.5%	18.5%
Annualized change 2006-2030	0.26%	0.71%

Western New York Supply Scenario 3a: Increase in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 685 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	3,999	285.8
2015	3,996	291.1
2020	3,955	294.2
2025	3,885	295.8
2030	3,783	296.2
Percent change 2006-2030	-4.6%	6.1%
Annualized change 2006-2030	-0.20%	0.25%

Figure 686 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,385	99.0	2010	2,614	186.9
2015	1,369	99.8	2015	2,626	191.3
2020	1,339	99.6	2020	2,616	194.6
2025	1,293	98.5	2025	2,592	197.4
2030	1,235	96.7	2030	2,548	199.5
Percent change 2006-2030	-9.6%	0.5%	Percent change 2006-2030	-1.9%	9.0%
Annualized change 2006-2030	-0.42%	0.02%	Annualized change 2006-2030	-0.08%	0.36%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 687– Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,385	99.0	2010	424	30.3
2015	1,369	99.8	2015	422	30.8
2020	1,339	99.6	2020	412	30.7
2025	1,293	98.5	2025	396	30.2
2030	1,235	96.7	2030	373	29.2
Percent change 2006-2030	-9.6%	0.5%	Percent change 2006-2030	-11.5%	-1.6%
Annualized change 2006-2030	-0.42%	0.02%	Annualized change 2006-2030	-0.51%	-0.07%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	687	49.1	2010	274	19.6
2015	673	49.0	2015	275	20.0
2020	652	48.5	2020	274	20.4
2025	627	47.7	2025	270	20.6
2030	596	46.7	2030	265	20.8
Percent change 2006-2030	-11.6%	-1.8%	Percent change 2006-2030	-1.7%	9.3%
Annualized change 2006-2030	-0.51%	-0.07%	Annualized change 2006-2030	-0.07%	0.37%

Non-Primary Care Specialties

Figure 688 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	118	8.3	2006	429	30.2
2010	120	8.6	2010	445	31.8
2015	124	9.1	2015	475	34.6
2020	128	9.5	2020	498	37.1
2025	131	10.0	2025	517	39.3
2030	132	10.4	2030	528	41.3
Percent change 2006-2030	12.1%	24.7%	Percent change 2006-2030	23.0%	36.8%
Annualized change 2006-2030	0.48%	0.92%	Annualized change 2006-2030	0.87%	1.31%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	206	14.5	2006	109	7.7
2010	207	14.8	2010	101	7.2
2015	206	15.0	2015	93	6.8
2020	202	15.0	2020	85	6.3
2025	195	14.9	2025	78	5.9
2030	188	14.7	2030	71	5.6
Percent change 2006-2030	-8.6%	1.7%	Percent change 2006-2030	-34.9%	-27.6%
Annualized change 2006-2030	-0.37%	0.07%	Annualized change 2006-2030	-1.77%	-1.33%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	167	11.8	2006	192	13.5
2010	160	11.4	2010	193	13.8
2015	152	11.1	2015	188	13.7
2020	140	10.4	2020	190	14.1
2025	130	9.9	2025	189	14.4
2030	120	9.4	2030	185	14.5
Percent change 2006-2030	-28.0%	-20.0%	Percent change 2006-2030	-3.8%	7.0%
Annualized change 2006-2030	-1.36%	-0.92%	Annualized change 2006-2030	-0.16%	0.28%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	207	14.6	2006	168	11.8
2010	215	15.4	2010	180	12.9
2015	218	15.9	2015	199	14.5
2020	217	16.2	2020	213	15.9
2025	217	16.5	2025	224	17.1
2030	215	16.8	2030	231	18.1
Percent change 2006-2030	3.6%	15.2%	Percent change 2006-2030	37.6%	53.0%
Annualized change 2006-2030	0.15%	0.59%	Annualized change 2006-2030	1.34%	1.79%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	167	11.9
2015	170	12.4
2020	169	12.6
2025	168	12.8
2030	166	13.0
Percent change 2006-2030	1.4%	12.7%
Annualized change 2006-2030	0.06%	0.50%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	93	6.7
2015	86	6.3
2020	81	6.0
2025	75	5.7
2030	69	5.4
Percent change 2006-2030	-30.2%	-22.4%
Annualized change 2006-2030	-1.49%	-1.05%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	37	2.6
2015	36	2.6
2020	35	2.6
2025	33	2.5
2030	31	2.4
Percent change 2006-2030	-17.7%	-8.5%
Annualized change 2006-2030	-0.81%	-0.37%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	130	9.3
2015	129	9.4
2020	127	9.5
2025	126	9.6
2030	125	9.8
Percent change 2006-2030	-3.3%	7.5%
Annualized change 2006-2030	-0.14%	0.30%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	60	4.3
2015	55	4.0
2020	51	3.8
2025	48	3.7
2030	45	3.5
Percent change 2006-2030	-28.6%	-20.6%
Annualized change 2006-2030	-1.39%	-0.96%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	92	6.5
2015	86	6.3
2020	82	6.1
2025	77	5.9
2030	72	5.6
Percent change 2006-2030	-24.6%	-16.1%
Annualized change 2006-2030	-1.17%	-0.73%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	415	29.7
2015	409	29.8
2020	397	29.5
2025	384	29.2
2030	370	28.9
Percent change 2006-2030	-10.7%	-0.7%
Annualized change 2006-2030	-0.47%	-0.03%

Western New York Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 689 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,123	294.7
2015	4,285	312.2
2020	4,391	326.6
2025	4,448	338.7
2030	4,473	350.2
Percent change 2006-2030	12.8%	25.4%
Annualized change 2006-2030	0.50%	0.95%

Figure 690 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,425	101.8	2010	2,698	192.9
2015	1,462	106.5	2015	2,823	205.7
2020	1,474	109.6	2020	2,916	216.9
2025	1,465	111.6	2025	2,982	227.1
2030	1,441	112.9	2030	3,031	237.4
Percent change 2006-2030	5.4%	17.3%	Percent change 2006-2030	16.7%	29.8%
Annualized change 2006-2030	0.22%	0.67%	Annualized change 2006-2030	0.64%	1.09%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 691 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,425	101.8	2010	434	31.0
2015	1,462	106.5	2015	446	32.5
2020	1,474	109.6	2020	446	33.2
2025	1,465	111.6	2025	438	33.4
2030	1,441	112.9	2030	423	33.1
Percent change 2006-2030	5.4%	17.3%	Percent change 2006-2030	0.3%	11.5%
Annualized change 2006-2030	0.22%	0.67%	Annualized change 2006-2030	0.01%	0.46%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	710	50.7	2010	281	20.1
2015	726	52.9	2015	290	21.1
2020	731	54.3	2020	297	22.1
2025	725	55.2	2025	302	23.0
2030	712	55.8	2030	306	24.0
Percent change 2006-2030	5.5%	17.4%	Percent change 2006-2030	13.3%	26.0%
Annualized change 2006-2030	0.22%	0.67%	Annualized change 2006-2030	0.52%	0.97%

Non-Primary Care Specialties

Figure 692 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	118	8.3
2010	124	8.9
2015	135	9.8
2020	144	10.7
2025	152	11.5
2030	159	12.4
Percent change 2006-2030	34.7%	49.8%
Annualized change 2006-2030	1.25%	1.70%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	429	30.2
2010	461	33.0
2015	513	37.4
2020	559	41.6
2025	598	45.5
2030	634	49.6
Percent change 2006-2030	47.7%	64.3%
Annualized change 2006-2030	1.64%	2.09%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	206	14.5
2010	212	15.2
2015	219	16.0
2020	223	16.6
2025	224	17.0
2030	223	17.4
Percent change 2006-2030	8.1%	20.2%
Annualized change 2006-2030	0.32%	0.77%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	109	7.7
2010	104	7.4
2015	99	7.2
2020	95	7.0
2025	90	6.8
2030	84	6.6
Percent change 2006-2030	-22.9%	-14.3%
Annualized change 2006-2030	-1.08%	-0.64%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	167	11.8
2010	165	11.8
2015	164	11.9
2020	158	11.7
2025	152	11.5
2030	146	11.4
Percent change 2006-2030	-12.6%	-2.8%
Annualized change 2006-2030	-0.56%	-0.12%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	192	13.5
2010	199	14.2
2015	202	14.7
2020	211	15.7
2025	217	16.5
2030	218	17.1
Percent change 2006-2030	13.7%	26.5%
Annualized change 2006-2030	0.54%	0.98%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	207	14.6
2010	222	15.8
2015	234	17.1
2020	243	18.0
2025	249	18.9
2030	253	19.8
Percent change 2006-2030	22.4%	36.1%
Annualized change 2006-2030	0.84%	1.29%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	168	11.8
2010	185	13.2
2015	211	15.4
2020	234	17.4
2025	255	19.4
2030	272	21.3
Percent change 2006-2030	61.7%	79.9%
Annualized change 2006-2030	2.02%	2.48%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	173	12.3
2015	182	13.3
2020	188	14.0
2025	193	14.7
2030	198	15.5
Percent change 2006-2030	20.6%	34.1%
Annualized change 2006-2030	0.78%	1.23%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	97	6.9
2015	94	6.8
2020	90	6.7
2025	86	6.6
2030	83	6.5
Percent change 2006-2030	-16.6%	-7.3%
Annualized change 2006-2030	-0.75%	-0.31%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	38	2.7
2015	39	2.8
2020	38	2.8
2025	38	2.9
2030	37	2.9
Percent change 2006-2030	-3.3%	7.5%
Annualized change 2006-2030	-0.14%	0.30%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	134	9.6
2015	138	10.0
2020	141	10.5
2025	144	11.0
2030	146	11.5
Percent change 2006-2030	13.5%	26.3%
Annualized change 2006-2030	0.53%	0.98%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	61	4.4
2015	59	4.3
2020	57	4.2
2025	55	4.2
2030	53	4.1
Percent change 2006-2030	-16.4%	-7.1%
Annualized change 2006-2030	-0.75%	-0.31%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	94	6.7
2015	93	6.8
2020	91	6.8
2025	88	6.7
2030	85	6.6
Percent change 2006-2030	-10.7%	-0.7%
Annualized change 2006-2030	-0.47%	-0.03%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	429	30.6
2015	441	32.1
2020	444	33.0
2025	443	33.8
2030	442	34.6
Percent change 2006-2030	6.7%	18.7%
Annualized change 2006-2030	0.27%	0.72%

Western New York Supply Scenario 3a: Increase in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 693 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	3,999	285.8
2015	3,996	291.1
2020	3,955	294.2
2025	3,885	295.8
2030	3,783	296.2
Percent change 2006-2030	-4.6%	6.1%
Annualized change 2006-2030	-0.20%	0.25%

Figure 694 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,385	99.0	2010	2,615	186.9
2015	1,368	99.7	2015	2,628	191.4
2020	1,336	99.4	2020	2,619	194.8
2025	1,289	98.2	2025	2,595	197.6
2030	1,231	96.4	2030	2,552	199.8
Percent change 2006-2030	-10.0%	0.1%	Percent change 2006-2030	-1.8%	9.2%
Annualized change 2006-2030	-0.44%	0.01%	Annualized change 2006-2030	-0.07%	0.37%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 695 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,385	99.0	2010	424	30.3
2015	1,368	99.7	2015	422	30.7
2020	1,336	99.4	2020	412	30.6
2025	1,289	98.2	2025	395	30.1
2030	1,231	96.4	2030	372	29.1
Percent change 2006-2030	-10.0%	0.1%	Percent change 2006-2030	-11.8%	-1.9%
Annualized change 2006-2030	-0.44%	0.01%	Annualized change 2006-2030	-0.52%	-0.08%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	687	49.1	2010	274	19.6
2015	672	49.0	2015	274	20.0
2020	651	48.4	2020	274	20.4
2025	625	47.6	2025	269	20.5
2030	594	46.5	2030	265	20.7
Percent change 2006-2030	-12.0%	-2.1%	Percent change 2006-2030	-2.0%	8.9%
Annualized change 2006-2030	-0.53%	-0.09%	Annualized change 2006-2030	-0.09%	0.36%

Non-Primary Care Specialties

Figure 696 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	118	8.3
2010	120	8.6
2015	124	9.1
2020	128	9.5
2025	131	10.0
2030	133	10.4
Percent change 2006-2030	12.3%	24.9%
Annualized change 2006-2030	0.48%	0.93%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	429	30.2
2010	445	31.8
2015	475	34.6
2020	499	37.1
2025	517	39.4
2030	529	41.4
Percent change 2006-2030	23.3%	37.1%
Annualized change 2006-2030	0.87%	1.32%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	206	14.5
2010	207	14.8
2015	207	15.0
2020	202	15.0
2025	195	14.9
2030	189	14.8
Percent change 2006-2030	-8.4%	1.8%
Annualized change 2006-2030	-0.37%	0.08%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	109	7.7
2010	101	7.2
2015	93	6.8
2020	85	6.3
2025	78	5.9
2030	71	5.6
Percent change 2006-2030	-34.7%	-27.4%
Annualized change 2006-2030	-1.76%	-1.33%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	167	11.8
2010	160	11.4
2015	152	11.1
2020	141	10.5
2025	130	9.9
2030	120	9.4
Percent change 2006-2030	-27.9%	-19.8%
Annualized change 2006-2030	-1.35%	-0.92%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	192	13.5
2010	193	13.8
2015	188	13.7
2020	190	14.1
2025	190	14.4
2030	185	14.5
Percent change 2006-2030	-3.6%	7.2%
Annualized change 2006-2030	-0.15%	0.29%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	207	14.6
2010	215	15.4
2015	218	15.9
2020	217	16.2
2025	217	16.6
2030	215	16.8
Percent change 2006-2030	3.8%	15.4%
Annualized change 2006-2030	0.16%	0.60%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	168	11.8
2010	180	12.9
2015	199	14.5
2020	213	15.9
2025	225	17.1
2030	232	18.1
Percent change 2006-2030	37.8%	53.3%
Annualized change 2006-2030	1.35%	1.79%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	167	11.9
2015	170	12.4
2020	169	12.6
2025	169	12.8
2030	167	13.0
Percent change 2006-2030	1.6%	12.9%
Annualized change 2006-2030	0.06%	0.51%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	93	6.7
2015	86	6.3
2020	81	6.0
2025	75	5.7
2030	69	5.4
Percent change 2006-2030	-30.1%	-22.3%
Annualized change 2006-2030	-1.48%	-1.04%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	37	2.6
2015	36	2.6
2020	35	2.6
2025	33	2.5
2030	31	2.5
Percent change 2006-2030	-17.6%	-8.3%
Annualized change 2006-2030	-0.80%	-0.36%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	130	9.3
2015	129	9.4
2020	128	9.5
2025	126	9.6
2030	125	9.8
Percent change 2006-2030	-3.2%	7.7%
Annualized change 2006-2030	-0.13%	0.31%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	60	4.3
2015	55	4.0
2020	51	3.8
2025	48	3.7
2030	45	3.5
Percent change 2006-2030	-28.5%	-20.5%
Annualized change 2006-2030	-1.39%	-0.95%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	92	6.5
2015	86	6.3
2020	82	6.1
2025	77	5.9
2030	72	5.6
Percent change 2006-2030	-24.5%	-16.0%
Annualized change 2006-2030	-1.16%	-0.72%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	415	29.7
2015	409	29.8
2020	397	29.6
2025	384	29.2
2030	370	29.0
Percent change 2006-2030	-10.5%	-0.5%
Annualized change 2006-2030	-0.46%	-0.02%

Western New York Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Not Responsive to Demand)

Figure 697 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,113	293.9
2015	4,222	307.6
2020	4,275	318.0
2025	4,280	325.9
2030	4,263	333.8
Percent change 2006-2030	7.5%	19.6%
Annualized change 2006-2030	0.30%	0.75%

Figure 698 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,422	101.6	2010	2,691	192.3
2015	1,445	105.3	2015	2,777	202.3
2020	1,443	107.4	2020	2,832	210.6
2025	1,421	108.2	2025	2,859	217.7
2030	1,385	108.5	2030	2,877	225.3
Percent change 2006-2030	1.3%	12.7%	Percent change 2006-2030	10.8%	23.2%
Annualized change 2006-2030	0.06%	0.50%	Annualized change 2006-2030	0.43%	0.87%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 699 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,422	101.6	2010	433	31.0
2015	1,445	105.3	2015	440	32.1
2020	1,443	107.4	2020	437	32.5
2025	1,421	108.2	2025	425	32.4
2030	1,385	108.5	2030	407	31.9
Percent change 2006-2030	1.3%	12.7%	Percent change 2006-2030	-3.6%	7.2%
Annualized change 2006-2030	0.06%	0.50%	Annualized change 2006-2030	-0.15%	0.29%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	708	50.6	2010	280	20.0
2015	718	52.3	2015	287	20.9
2020	715	53.2	2020	291	21.6
2025	703	53.5	2025	293	22.3
2030	685	53.6	2030	294	23.0
Percent change 2006-2030	1.4%	12.8%	Percent change 2006-2030	8.9%	21.1%
Annualized change 2006-2030	0.06%	0.50%	Annualized change 2006-2030	0.36%	0.80%

Non-Primary Care Specialties

Figure 700 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	118	8.3	2006	429	30.2
2010	123	8.8	2010	460	32.9
2015	133	9.7	2015	505	36.8
2020	140	10.4	2020	543	40.4
2025	145	11.1	2025	573	43.7
2030	151	11.8	2030	602	47.1
Percent change 2006-2030	27.9%	42.2%	Percent change 2006-2030	40.2%	55.9%
Annualized change 2006-2030	1.03%	1.48%	Annualized change 2006-2030	1.42%	1.87%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	206	14.5	2006	109	7.7
2010	212	15.1	2010	104	7.4
2015	216	15.7	2015	98	7.1
2020	216	16.1	2020	92	6.8
2025	214	16.3	2025	86	6.5
2030	211	16.5	2030	80	6.2
Percent change 2006-2030	2.6%	14.1%	Percent change 2006-2030	-26.8%	-18.6%
Annualized change 2006-2030	0.11%	0.55%	Annualized change 2006-2030	-1.29%	-0.86%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	167	11.8	2006	192	13.5
2010	165	11.8	2010	199	14.2
2015	161	11.7	2015	199	14.5
2020	153	11.4	2020	205	15.2
2025	145	11.1	2025	208	15.8
2030	139	10.8	2030	207	16.2
Percent change 2006-2030	-17.1%	-7.8%	Percent change 2006-2030	7.9%	20.0%
Annualized change 2006-2030	-0.78%	-0.34%	Annualized change 2006-2030	0.32%	0.76%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	207	14.6	2006	168	11.8
2010	221	15.8	2010	185	13.2
2015	231	16.8	2015	208	15.1
2020	235	17.5	2020	228	16.9
2025	238	18.1	2025	244	18.6
2030	240	18.8	2030	258	20.2
Percent change 2006-2030	16.1%	29.1%	Percent change 2006-2030	53.5%	70.7%
Annualized change 2006-2030	0.63%	1.07%	Annualized change 2006-2030	1.80%	2.25%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	172	12.3
2015	179	13.1
2020	182	13.6
2025	185	14.1
2030	188	14.7
Percent change 2006-2030	14.5%	27.3%
Annualized change 2006-2030	0.56%	1.01%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	96	6.9
2015	92	6.7
2020	88	6.5
2025	83	6.3
2030	78	6.1
Percent change 2006-2030	-20.8%	-12.0%
Annualized change 2006-2030	-0.97%	-0.53%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	38	2.7
2015	38	2.8
2020	37	2.8
2025	36	2.8
2030	35	2.7
Percent change 2006-2030	-8.3%	2.0%
Annualized change 2006-2030	-0.36%	0.08%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	133	9.5
2015	136	9.9
2020	137	10.2
2025	138	10.5
2030	139	10.9
Percent change 2006-2030	7.8%	19.8%
Annualized change 2006-2030	0.31%	0.76%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	61	4.4
2015	58	4.2
2020	55	4.1
2025	53	4.0
2030	50	3.9
Percent change 2006-2030	-20.7%	-11.8%
Annualized change 2006-2030	-0.96%	-0.52%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	94	6.7
2015	91	6.6
2020	88	6.6
2025	85	6.4
2030	81	6.3
Percent change 2006-2030	-15.2%	-5.7%
Annualized change 2006-2030	-0.68%	-0.24%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	428	30.6
2015	434	31.6
2020	431	32.1
2025	425	32.4
2030	419	32.8
Percent change 2006-2030	1.3%	12.6%
Annualized change 2006-2030	0.05%	0.50%

Western New York Supply Scenario 3b: Decrease in Physician Retention (33% Primary Care/67% Non-Primary Care, Supply Responsive to Demand)

Figure 701 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	3,990	285.2
2015	3,942	287.2
2020	3,857	286.9
2025	3,742	285.0
2030	3,605	282.3
Percent change 2006-2030	-9.1%	1.1%
Annualized change 2006-2030	-0.40%	0.05%

Figure 702 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,382	98.8	2010	2,608	186.4
2015	1,354	98.6	2015	2,589	188.6
2020	1,310	97.5	2020	2,547	189.4
2025	1,252	95.3	2025	2,491	189.7
2030	1,183	92.7	2030	2,421	189.6
Percent change 2006-2030	-13.4%	-3.7%	Percent change 2006-2030	-6.8%	3.6%
Annualized change 2006-2030	-0.60%	-0.16%	Annualized change 2006-2030	-0.29%	0.15%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 703 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,382	98.8	2010	424	30.3
2015	1,354	98.6	2015	417	30.4
2020	1,310	97.5	2020	404	30.0
2025	1,252	95.3	2025	383	29.2
2030	1,183	92.7	2030	358	28.0
Percent change 2006-2030	-13.4%	-3.7%	Percent change 2006-2030	-15.2%	-5.7%
Annualized change 2006-2030	-0.60%	-0.16%	Annualized change 2006-2030	-0.69%	-0.24%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	686	49.0	2010	273	19.5
2015	665	48.4	2015	271	19.8
2020	638	47.5	2020	269	20.0
2025	607	46.2	2025	261	19.9
2030	571	44.7	2030	254	19.9
Percent change 2006-2030	-15.4%	-5.9%	Percent change 2006-2030	-5.8%	4.7%
Annualized change 2006-2030	-0.69%	-0.25%	Annualized change 2006-2030	-0.25%	0.19%

Non-Primary Care Specialties

Figure 704 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	118	8.3	2006	429	30.2
2010	119	8.5	2010	444	31.8
2015	123	8.9	2015	468	34.1
2020	124	9.2	2020	485	36.1
2025	126	9.6	2025	496	37.8
2030	126	9.8	2030	502	39.3
Percent change 2006-2030	6.6%	18.5%	Percent change 2006-2030	16.9%	30.0%
Annualized change 2006-2030	0.26%	0.71%	Annualized change 2006-2030	0.65%	1.10%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	206	14.5	2006	109	7.7
2010	206	14.7	2010	100	7.2
2015	203	14.8	2015	92	6.7
2020	197	14.6	2020	83	6.2
2025	188	14.3	2025	75	5.7
2030	179	14.0	2030	67	5.3
Percent change 2006-2030	-13.1%	-3.4%	Percent change 2006-2030	-38.1%	-31.1%
Annualized change 2006-2030	-0.58%	-0.14%	Annualized change 2006-2030	-1.98%	-1.54%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	167	11.8	2006	192	13.5
2010	160	11.4	2010	193	13.8
2015	150	10.9	2015	185	13.5
2020	137	10.2	2020	185	13.7
2025	125	9.5	2025	182	13.9
2030	114	8.9	2030	176	13.7
Percent change 2006-2030	-31.6%	-23.9%	Percent change 2006-2030	-8.6%	1.7%
Annualized change 2006-2030	-1.57%	-1.13%	Annualized change 2006-2030	-0.37%	0.07%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	207	14.6	2006	168	11.8
2010	215	15.3	2010	180	12.9
2015	215	15.6	2015	196	14.3
2020	211	15.7	2020	208	15.4
2025	209	15.9	2025	216	16.4
2030	204	16.0	2030	220	17.2
Percent change 2006-2030	-1.5%	9.5%	Percent change 2006-2030	30.8%	45.4%
Annualized change 2006-2030	-0.06%	0.38%	Annualized change 2006-2030	1.12%	1.57%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	167	11.9
2015	167	12.2
2020	165	12.3
2025	162	12.3
2030	158	12.4
Percent change 2006-2030	-3.6%	7.2%
Annualized change 2006-2030	-0.15%	0.29%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	93	6.6
2015	85	6.2
2020	79	5.8
2025	72	5.5
2030	66	5.1
Percent change 2006-2030	-33.7%	-26.3%
Annualized change 2006-2030	-1.70%	-1.26%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	36	2.6
2015	36	2.6
2020	34	2.5
2025	31	2.4
2030	30	2.3
Percent change 2006-2030	-21.8%	-13.0%
Annualized change 2006-2030	-1.02%	-0.58%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	130	9.3
2015	127	9.3
2020	124	9.2
2025	121	9.2
2030	119	9.3
Percent change 2006-2030	-8.1%	2.2%
Annualized change 2006-2030	-0.35%	0.09%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	60	4.3
2015	54	3.9
2020	50	3.7
2025	46	3.5
2030	43	3.3
Percent change 2006-2030	-32.1%	-24.5%
Annualized change 2006-2030	-1.60%	-1.17%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	91	6.5
2015	85	6.2
2020	80	6.0
2025	74	5.6
2030	68	5.3
Percent change 2006-2030	-28.3%	-20.3%
Annualized change 2006-2030	-1.38%	-0.94%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	414	29.6
2015	403	29.4
2020	386	28.7
2025	369	28.1
2030	351	27.5
Percent change 2006-2030	-15.1%	-5.6%
Annualized change 2006-2030	-0.68%	-0.24%

Western New York Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Not Responsive to Demand)

Figure 705 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,113	293.9
2015	4,222	307.6
2020	4,275	318.0
2025	4,280	325.9
2030	4,263	333.8
Percent change 2006-2030	7.5%	19.6%
Annualized change 2006-2030	0.30%	0.75%

Figure 706 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,422	101.7	2010	2,690	192.3
2015	1,447	105.4	2015	2,774	202.1
2020	1,448	107.7	2020	2,827	210.3
2025	1,428	108.7	2025	2,852	217.2
2030	1,394	109.2	2030	2,869	224.6
Percent change 2006-2030	2.0%	13.4%	Percent change 2006-2030	10.4%	22.8%
Annualized change 2006-2030	0.08%	0.53%	Annualized change 2006-2030	0.41%	0.86%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 707 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,422	101.7	2010	433	31.0
2015	1,447	105.4	2015	441	32.1
2020	1,448	107.7	2020	439	32.6
2025	1,428	108.7	2025	427	32.5
2030	1,394	109.2	2030	409	32.1
Percent change 2006-2030	2.0%	13.4%	Percent change 2006-2030	-3.0%	7.9%
Annualized change 2006-2030	0.08%	0.53%	Annualized change 2006-2030	-0.13%	0.32%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	709	50.7	2010	280	20.0
2015	719	52.4	2015	287	20.9
2020	718	53.4	2020	292	21.7
2025	706	53.8	2025	294	22.4
2030	689	53.9	2030	296	23.2
Percent change 2006-2030	2.1%	13.5%	Percent change 2006-2030	9.6%	21.9%
Annualized change 2006-2030	0.09%	0.53%	Annualized change 2006-2030	0.38%	0.83%

Non-Primary Care Specialties

Figure 708 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	118	8.3
2010	123	8.8
2015	132	9.7
2020	140	10.4
2025	145	11.0
2030	150	11.8
Percent change 2006-2030	27.5%	41.8%
Annualized change 2006-2030	1.02%	1.46%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	429	30.2
2010	460	32.9
2015	504	36.7
2020	542	40.3
2025	572	43.6
2030	600	47.0
Percent change 2006-2030	39.8%	55.4%
Annualized change 2006-2030	1.41%	1.86%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	206	14.5
2010	212	15.1
2015	216	15.7
2020	216	16.1
2025	214	16.3
2030	211	16.5
Percent change 2006-2030	2.3%	13.7%
Annualized change 2006-2030	0.09%	0.54%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	109	7.7
2010	104	7.4
2015	98	7.1
2020	92	6.8
2025	86	6.5
2030	80	6.2
Percent change 2006-2030	-27.1%	-18.9%
Annualized change 2006-2030	-1.31%	-0.87%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	167	11.8
2010	165	11.8
2015	161	11.7
2020	153	11.4
2025	145	11.0
2030	138	10.8
Percent change 2006-2030	-17.3%	-8.1%
Annualized change 2006-2030	-0.79%	-0.35%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	192	13.5
2010	199	14.2
2015	199	14.5
2020	205	15.2
2025	207	15.8
2030	207	16.2
Percent change 2006-2030	7.6%	19.7%
Annualized change 2006-2030	0.31%	0.75%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	207	14.6
2010	221	15.8
2015	230	16.8
2020	235	17.5
2025	238	18.1
2030	240	18.8
Percent change 2006-2030	15.8%	28.8%
Annualized change 2006-2030	0.61%	1.06%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	168	11.8
2010	185	13.2
2015	207	15.1
2020	227	16.9
2025	244	18.6
2030	257	20.1
Percent change 2006-2030	53.0%	70.2%
Annualized change 2006-2030	1.79%	2.24%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	172	12.3
2015	179	13.0
2020	182	13.5
2025	185	14.1
2030	187	14.7
Percent change 2006-2030	14.1%	26.9%
Annualized change 2006-2030	0.55%	1.00%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	96	6.9
2015	92	6.7
2020	88	6.5
2025	82	6.3
2030	78	6.1
Percent change 2006-2030	-21.1%	-12.2%
Annualized change 2006-2030	-0.98%	-0.54%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	38	2.7
2015	38	2.8
2020	37	2.7
2025	36	2.8
2030	35	2.7
Percent change 2006-2030	-8.5%	1.7%
Annualized change 2006-2030	-0.37%	0.07%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	133	9.5
2015	136	9.9
2020	137	10.2
2025	138	10.5
2030	139	10.9
Percent change 2006-2030	7.4%	19.5%
Annualized change 2006-2030	0.30%	0.74%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	61	4.4
2015	58	4.2
2020	55	4.1
2025	52	4.0
2030	50	3.9
Percent change 2006-2030	-20.9%	-12.1%
Annualized change 2006-2030	-0.97%	-0.53%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	94	6.7
2015	91	6.6
2020	88	6.6
2025	84	6.4
2030	80	6.3
Percent change 2006-2030	-15.5%	-6.0%
Annualized change 2006-2030	-0.70%	-0.26%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	427	30.6
2015	433	31.6
2020	431	32.0
2025	424	32.3
2030	418	32.7
Percent change 2006-2030	1.0%	12.3%
Annualized change 2006-2030	0.04%	0.48%

Western New York Supply Scenario 3b: Decrease in Physician Retention (25% Primary Care/75% Non-Primary Care, Supply Responsive to Demand)

Figure 709 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	3,990	285.2
2015	3,942	287.2
2020	3,857	286.9
2025	3,742	285.0
2030	3,605	282.3
Percent change 2006-2030	-9.1%	1.1%
Annualized change 2006-2030	-0.40%	0.05%

Figure 710 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,383	98.8	2010	2,608	186.4
2015	1,356	98.8	2015	2,586	188.4
2020	1,314	97.8	2020	2,543	189.1
2025	1,257	95.7	2025	2,485	189.2
2030	1,191	93.2	2030	2,414	189.0
Percent change 2006-2030	-12.9%	-3.1%	Percent change 2006-2030	-7.1%	3.3%
Annualized change 2006-2030	-0.57%	-0.13%	Annualized change 2006-2030	-0.31%	0.14%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 711 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,383	98.8	2010	424	30.3
2015	1,356	98.8	2015	418	30.5
2020	1,314	97.8	2020	405	30.1
2025	1,257	95.7	2025	385	29.3
2030	1,191	93.2	2030	360	28.2
Percent change 2006-2030	-12.9%	-3.1%	Percent change 2006-2030	-14.7%	-5.1%
Annualized change 2006-2030	-0.57%	-0.13%	Annualized change 2006-2030	-0.66%	-0.22%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	686	49.0	2010	273	19.5
2015	666	48.5	2015	272	19.8
2020	640	47.6	2020	269	20.0
2025	610	46.4	2025	263	20.0
2030	575	45.0	2030	256	20.0
Percent change 2006-2030	-14.8%	-5.3%	Percent change 2006-2030	-5.2%	5.4%
Annualized change 2006-2030	-0.67%	-0.23%	Annualized change 2006-2030	-0.22%	0.22%

Non-Primary Care Specialties

Figure 712 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	118	8.3	2006	429	30.2
2010	119	8.5	2010	444	31.7
2015	122	8.9	2015	468	34.1
2020	124	9.2	2020	484	36.0
2025	126	9.6	2025	495	37.7
2030	125	9.8	2030	500	39.2
Percent change 2006-2030	6.2%	18.1%	Percent change 2006-2030	16.6%	29.6%
Annualized change 2006-2030	0.25%	0.70%	Annualized change 2006-2030	0.64%	1.09%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	206	14.5	2006	109	7.7
2010	206	14.7	2010	100	7.2
2015	203	14.8	2015	92	6.7
2020	196	14.6	2020	83	6.2
2025	187	14.2	2025	75	5.7
2030	178	14.0	2030	67	5.3
Percent change 2006-2030	-13.4%	-3.7%	Percent change 2006-2030	-38.3%	-31.4%
Annualized change 2006-2030	-0.60%	-0.16%	Annualized change 2006-2030	-1.99%	-1.56%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	167	11.8	2006	192	13.5
2010	160	11.4	2010	193	13.8
2015	150	10.9	2015	185	13.5
2020	136	10.1	2020	184	13.7
2025	125	9.5	2025	182	13.8
2030	114	8.9	2030	175	13.7
Percent change 2006-2030	-31.8%	-24.2%	Percent change 2006-2030	-8.9%	1.4%
Annualized change 2006-2030	-1.58%	-1.15%	Annualized change 2006-2030	-0.39%	0.06%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	207	14.6	2006	168	11.8
2010	215	15.3	2010	180	12.9
2015	214	15.6	2015	196	14.3
2020	211	15.7	2020	207	15.4
2025	208	15.9	2025	215	16.4
2030	203	15.9	2030	219	17.1
Percent change 2006-2030	-1.8%	9.2%	Percent change 2006-2030	30.4%	45.0%
Annualized change 2006-2030	-0.08%	0.37%	Annualized change 2006-2030	1.11%	1.56%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	167	11.9
2015	167	12.2
2020	165	12.2
2025	161	12.3
2030	158	12.3
Percent change 2006-2030	-3.9%	6.8%
Annualized change 2006-2030	-0.17%	0.28%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	93	6.6
2015	85	6.2
2020	78	5.8
2025	72	5.4
2030	65	5.1
Percent change 2006-2030	-33.9%	-26.5%
Annualized change 2006-2030	-1.71%	-1.27%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	36	2.6
2015	36	2.6
2020	34	2.5
2025	31	2.4
2030	30	2.3
Percent change 2006-2030	-22.0%	-13.3%
Annualized change 2006-2030	-1.03%	-0.59%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	130	9.3
2015	127	9.2
2020	124	9.2
2025	121	9.2
2030	118	9.3
Percent change 2006-2030	-8.4%	1.9%
Annualized change 2006-2030	-0.37%	0.08%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	60	4.3
2015	54	3.9
2020	49	3.7
2025	46	3.5
2030	43	3.3
Percent change 2006-2030	-32.3%	-24.8%
Annualized change 2006-2030	-1.62%	-1.18%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	91	6.5
2015	85	6.2
2020	80	6.0
2025	74	5.6
2030	68	5.3
Percent change 2006-2030	-28.6%	-20.5%
Annualized change 2006-2030	-1.39%	-0.95%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	414	29.6
2015	403	29.3
2020	386	28.7
2025	368	28.0
2030	350	27.4
Percent change 2006-2030	-15.4%	-5.9%
Annualized change 2006-2030	-0.69%	-0.25%

Western New York Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Not Responsive to Demand)

Figure 713 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	4,113	293.9
2015	4,222	307.6
2020	4,275	318.0
2025	4,280	325.9
2030	4,263	333.8
Percent change 2006-2030	7.5%	19.6%
Annualized change 2006-2030	0.30%	0.75%

Figure 714 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,423	101.7	2010	2,690	192.3
2015	1,449	105.6	2015	2,773	202.0
2020	1,451	107.9	2020	2,824	210.0
2025	1,432	109.0	2025	2,848	216.9
2030	1,399	109.6	2030	2,863	224.2
Percent change 2006-2030	2.4%	13.8%	Percent change 2006-2030	10.2%	22.6%
Annualized change 2006-2030	0.10%	0.54%	Annualized change 2006-2030	0.41%	0.85%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 715 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,423	101.7	2010	433	31.0
2015	1,449	105.6	2015	442	32.2
2020	1,451	107.9	2020	439	32.7
2025	1,432	109.0	2025	428	32.6
2030	1,399	109.6	2030	411	32.2
Percent change 2006-2030	2.4%	13.8%	Percent change 2006-2030	-2.6%	8.3%
Annualized change 2006-2030	0.10%	0.54%	Annualized change 2006-2030	-0.11%	0.33%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	709	50.7	2010	280	20.0
2015	720	52.4	2015	288	21.0
2020	719	53.5	2020	292	21.8
2025	708	53.9	2025	295	22.5
2030	692	54.2	2030	297	23.3
Percent change 2006-2030	2.5%	13.9%	Percent change 2006-2030	10.0%	22.3%
Annualized change 2006-2030	0.10%	0.54%	Annualized change 2006-2030	0.40%	0.84%

Non-Primary Care Specialties

Figure 716 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	118	8.3	2006	429	30.2
2010	123	8.8	2010	460	32.9
2015	132	9.6	2015	504	36.7
2020	140	10.4	2020	541	40.3
2025	145	11.0	2025	571	43.5
2030	150	11.8	2030	599	46.9
Percent change 2006-2030	27.3%	41.5%	Percent change 2006-2030	39.5%	55.2%
Annualized change 2006-2030	1.01%	1.46%	Annualized change 2006-2030	1.40%	1.85%

Obstetrics and Gynecology			Pathology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	206	14.5	2006	109	7.7
2010	212	15.1	2010	104	7.4
2015	216	15.7	2015	98	7.1
2020	216	16.0	2020	92	6.8
2025	213	16.3	2025	86	6.5
2030	210	16.5	2030	79	6.2
Percent change 2006-2030	2.1%	13.5%	Percent change 2006-2030	-27.2%	-19.0%
Annualized change 2006-2030	0.09%	0.53%	Annualized change 2006-2030	-1.31%	-0.88%

Psychiatry			Anesthesiology		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	167	11.8	2006	192	13.5
2010	165	11.8	2010	199	14.2
2015	161	11.7	2015	199	14.5
2020	153	11.4	2020	204	15.2
2025	145	11.0	2025	207	15.7
2030	138	10.8	2030	206	16.1
Percent change 2006-2030	-17.5%	-8.2%	Percent change 2006-2030	7.4%	19.4%
Annualized change 2006-2030	-0.80%	-0.36%	Annualized change 2006-2030	0.30%	0.74%

Radiology			Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	207	14.6	2006	168	11.8
2010	221	15.8	2010	185	13.2
2015	230	16.8	2015	207	15.1
2020	235	17.5	2020	227	16.9
2025	237	18.1	2025	243	18.5
2030	239	18.7	2030	257	20.1
Percent change 2006-2030	15.6%	28.5%	Percent change 2006-2030	52.8%	69.9%
Annualized change 2006-2030	0.60%	1.05%	Annualized change 2006-2030	1.78%	2.23%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	172	12.3
2015	179	13.0
2020	182	13.5
2025	185	14.1
2030	187	14.6
Percent change 2006-2030	13.9%	26.7%
Annualized change 2006-2030	0.54%	0.99%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	96	6.9
2015	92	6.7
2020	88	6.5
2025	82	6.3
2030	78	6.1
Percent change 2006-2030	-21.2%	-12.4%
Annualized change 2006-2030	-0.99%	-0.55%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	38	2.7
2015	38	2.8
2020	37	2.7
2025	36	2.8
2030	35	2.7
Percent change 2006-2030	-8.7%	1.5%
Annualized change 2006-2030	-0.38%	0.06%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	133	9.5
2015	135	9.9
2020	137	10.2
2025	138	10.5
2030	138	10.8
Percent change 2006-2030	7.2%	19.3%
Annualized change 2006-2030	0.29%	0.74%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	61	4.4
2015	58	4.2
2020	55	4.1
2025	52	4.0
2030	50	3.9
Percent change 2006-2030	-21.1%	-12.2%
Annualized change 2006-2030	-0.98%	-0.54%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	94	6.7
2015	91	6.6
2020	88	6.6
2025	84	6.4
2030	80	6.3
Percent change 2006-2030	-15.6%	-6.2%
Annualized change 2006-2030	-0.70%	-0.26%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	427	30.5
2015	433	31.5
2020	430	32.0
2025	423	32.2
2030	417	32.7
Percent change 2006-2030	0.8%	12.1%
Annualized change 2006-2030	0.03%	0.48%

Western New York Supply Scenario 3b: Decrease in Physician Retention (20% Primary Care/80% Non-Primary Care, Supply Responsive to Demand)

Figure 717 – Western New York Physician Supply Forecast, 2006 – 2030

Year	Physicians	Physicians per 100,000 Population
2006	3,965	279.2
2010	3,990	285.2
2015	3,942	287.2
2020	3,857	286.9
2025	3,742	285.0
2030	3,605	282.3
Percent change 2006-2030	-9.1%	1.1%
Annualized change 2006-2030	-0.40%	0.05%

Figure 718 – Western New York Primary Care and Non-Primary Care Physician Supply Forecast, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,383	98.8	2010	2,607	186.4
2015	1,357	98.9	2015	2,585	188.3
2020	1,317	97.9	2020	2,540	188.9
2025	1,261	96.0	2025	2,481	189.0
2030	1,195	93.6	2030	2,410	188.7
Percent change 2006-2030	-12.6%	-2.8%	Percent change 2006-2030	-7.3%	3.1%
Annualized change 2006-2030	-0.56%	-0.12%	Annualized change 2006-2030	-0.31%	0.13%

Specialty-Specific Supply Forecasts

Primary Care Specialties

Figure 719 – Western New York Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,383	98.8	2010	424	30.3
2015	1,357	98.9	2015	419	30.5
2020	1,317	97.9	2020	406	30.2
2025	1,261	96.0	2025	386	29.4
2030	1,195	93.6	2030	361	28.3
Percent change 2006-2030	-12.6%	-2.8%	Percent change 2006-2030	-14.4%	-4.8%
Annualized change 2006-2030	-0.56%	-0.12%	Annualized change 2006-2030	-0.64%	-0.20%

General Internal Medicine			General Pediatrics		
Year	Physicians	Physicians per 100,000 Population	Year	Physicians	Physicians per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	686	49.0	2010	273	19.5
2015	667	48.6	2015	272	19.8
2020	641	47.7	2020	270	20.1
2025	611	46.6	2025	263	20.1
2030	577	45.2	2030	257	20.1
Percent change 2006-2030	-14.5%	-4.9%	Percent change 2006-2030	-4.9%	5.8%
Annualized change 2006-2030	-0.65%	-0.21%	Annualized change 2006-2030	-0.21%	0.23%

Non-Primary Care Specialties

Figure 720 – Western New York Non-Primary Care Physician Supply: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physicians	Physicians per 100,000 Population
2006	118	8.3
2010	119	8.5
2015	122	8.9
2020	124	9.2
2025	125	9.6
2030	125	9.8
Percent change 2006-2030	6.0%	17.9%
Annualized change 2006-2030	0.24%	0.69%

Other Internal Medicine Subspecialties		
Year	Physicians	Physicians per 100,000 Population
2006	429	30.2
2010	444	31.7
2015	468	34.1
2020	484	36.0
2025	495	37.7
2030	499	39.1
Percent change 2006-2030	16.4%	29.4%
Annualized change 2006-2030	0.63%	1.08%

Obstetrics and Gynecology		
Year	Physicians	Physicians per 100,000 Population
2006	206	14.5
2010	206	14.7
2015	203	14.8
2020	196	14.6
2025	187	14.2
2030	178	13.9
Percent change 2006-2030	-13.5%	-3.9%
Annualized change 2006-2030	-0.60%	-0.16%

Pathology		
Year	Physicians	Physicians per 100,000 Population
2006	109	7.7
2010	100	7.2
2015	92	6.7
2020	83	6.2
2025	74	5.7
2030	67	5.3
Percent change 2006-2030	-38.4%	-31.5%
Annualized change 2006-2030	-2.00%	-1.56%

Psychiatry		
Year	Physicians	Physicians per 100,000 Population
2006	167	11.8
2010	160	11.4
2015	150	10.9
2020	136	10.1
2025	124	9.5
2030	114	8.9
Percent change 2006-2030	-31.9%	-24.3%
Annualized change 2006-2030	-1.59%	-1.15%

Anesthesiology		
Year	Physicians	Physicians per 100,000 Population
2006	192	13.5
2010	193	13.8
2015	185	13.5
2020	184	13.7
2025	181	13.8
2030	175	13.7
Percent change 2006-2030	-9.0%	1.2%
Annualized change 2006-2030	-0.39%	0.05%

Radiology		
Year	Physicians	Physicians per 100,000 Population
2006	207	14.6
2010	215	15.3
2015	214	15.6
2020	211	15.7
2025	208	15.8
2030	203	15.9
Percent change 2006-2030	-2.0%	9.0%
Annualized change 2006-2030	-0.08%	0.36%

Emergency Medicine		
Year	Physicians	Physicians per 100,000 Population
2006	168	11.8
2010	180	12.9
2015	196	14.3
2020	207	15.4
2025	215	16.4
2030	219	17.1
Percent change 2006-2030	30.1%	44.7%
Annualized change 2006-2030	1.10%	1.55%

General Surgery

Year	Physicians	Physicians per 100,000 Population
2006	164	11.5
2010	167	11.9
2015	167	12.2
2020	164	12.2
2025	161	12.3
2030	157	12.3
Percent change 2006-2030	-4.1%	6.6%
Annualized change 2006-2030	-0.17%	0.27%

Ophthalmology

Year	Physicians	Physicians per 100,000 Population
2006	99	7.0
2010	93	6.6
2015	85	6.2
2020	78	5.8
2025	71	5.4
2030	65	5.1
Percent change 2006-2030	-34.0%	-26.6%
Annualized change 2006-2030	-1.72%	-1.28%

Otolaryngology

Year	Physicians	Physicians per 100,000 Population
2006	38	2.7
2010	36	2.6
2015	36	2.6
2020	34	2.5
2025	31	2.4
2030	30	2.3
Percent change 2006-2030	-22.2%	-13.5%
Annualized change 2006-2030	-1.04%	-0.60%

Orthopedic Surgery

Year	Physicians	Physicians per 100,000 Population
2006	129	9.1
2010	130	9.3
2015	127	9.2
2020	124	9.2
2025	121	9.2
2030	118	9.2
Percent change 2006-2030	-8.6%	1.7%
Annualized change 2006-2030	-0.37%	0.07%

Urology

Year	Physicians	Physicians per 100,000 Population
2006	63	4.4
2010	60	4.3
2015	54	3.9
2020	49	3.7
2025	46	3.5
2030	43	3.3
Percent change 2006-2030	-32.5%	-24.9%
Annualized change 2006-2030	-1.62%	-1.19%

Other Surgical Specialties

Year	Physicians	Physicians per 100,000 Population
2006	95	6.7
2010	91	6.5
2015	85	6.2
2020	80	5.9
2025	74	5.6
2030	68	5.3
Percent change 2006-2030	-28.7%	-20.7%
Annualized change 2006-2030	-1.40%	-0.96%

Other Specialties

Year	Physicians	Physicians per 100,000 Population
2006	414	29.2
2010	414	29.6
2015	403	29.3
2020	385	28.7
2025	367	28.0
2030	350	27.4
Percent change 2006-2030	-15.5%	-6.1%
Annualized change 2006-2030	-0.70%	-0.26%

Appendix 3: Regional Specialty-Specific Demand Forecasts

Physician Demand Forecast Scenarios and Assumptions

Forecasts of physician demand were developed under a number of scenarios. In what follows, descriptions of the scenarios as well as the forecasting results are presented.

Demand

The generic assumptions of all of the demand scenarios were that utilization rates of physician services by age, gender, insurance status, and rurality would remain constant over the forecast period; anticipated population change would follow the trends described in the previous section; and no significant changes would occur in the reimbursement of physician services.

In the first demand scenario, considered the baseline demand scenario, it was further assumed that: 1) the long-term economic health of the state would remain stable over the forecast period; 2) there would be no significant changes in the level of insurance coverage in the state; and 3) there would be no significant improvement in the identification or reduction of unnecessary/marginally-beneficial/duplicative services in the health care delivery system.

In the second demand scenario, in addition to the generic assumptions, it was assumed that: 1) there would be modest long-term economic growth in the state of an additional 1 percent annually¹ over the forecast period; 2) there would be no significant changes in the level of insurance coverage in the state; and 3) there would be no significant improvement in the identification or reduction of unnecessary/marginally-beneficial/duplicative services in the health care delivery system.

In the third demand scenario, in addition to the generic assumptions, it was assumed that: 1) the long-term economic health of the state would remain stable over the forecast period; 2) there would be a constant increase in the proportion of the population that has health insurance, and by 2020, all residents of the state would have health insurance; and 3) there would be no significant improvement in the identification or reduction of unnecessary/marginally-beneficial/duplicative services in the health care delivery system.

In the fourth demand scenario, in addition to the generic assumptions, it was assumed that: 1) the long-term economic health of the state would remain stable over the forecast period; 2) there would be no significant changes in the level of insurance coverage in the state; and 3) there would be a modest improvement in the identification and reduction of unnecessary/marginally-beneficial/duplicative non-primary care services in the delivery of physician services over the forecast period, resulting in a 5 percent efficiency gain in the provision of non-primary care services by 2030.

¹ To put this assumption into perspective, between 2003 and 2007, New York experienced an average annual growth in real gross state product of 3.2 percent (10th highest in the country). Between 1998 and 2007, the average annual growth rate was 3.1 percent (9th highest in the country). The average annual growth of real gross domestic product in the U.S. during those time periods was 2.3 percent and 2.4 percent, respectively (Source: BEA data retrieved November 2008).

Capital District Physician Demand Forecasts, 2006 – 2030

Capital District Demand Scenario 1: Baseline

Figure 1 – Capital District Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,071	288.7
2010	3,117	293.2
2015	3,196	300.7
2020	3,283	310.0
2025	3,364	320.2
2030	3,395	327.5
Percent change 2006-2030	10.6%	13.4%
Annualized change 2006-2030	0.42%	0.53%

Figure 2 – Capital District Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,029	96.8	2010	2,088	196.4
2015	1,046	98.4	2015	2,150	202.3
2020	1,067	100.7	2020	2,216	209.2
2025	1,087	103.5	2025	2,277	216.7
2030	1,091	105.2	2030	2,304	222.2
Percent change 2006-2030	6.4%	9.2%	Percent change 2006-2030	12.6%	15.5%
Annualized change 2006-2030	0.26%	0.37%	Annualized change 2006-2030	0.50%	0.60%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 3 – Capital District Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,029	96.8	2010	413	38.8
2015	1,046	98.4	2015	420	39.5
2020	1,067	100.7	2020	427	40.3
2025	1,087	103.5	2025	434	41.3
2030	1,091	105.2	2030	435	42.0
Percent change 2006-2030	6.4%	9.2%	Percent change 2006-2030	6.4%	9.1%
Annualized change 2006-2030	0.26%	0.37%	Annualized change 2006-2030	0.26%	0.36%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	410	38.6	2010	206	19.4
2015	423	39.8	2015	203	19.1
2020	438	41.4	2020	202	19.1
2025	452	43.0	2025	201	19.1
2030	459	44.3	2030	197	19.0
Percent change 2006-2030	14.5%	17.4%	Percent change 2006-2030	-8.4%	-6.0%
Annualized change 2006-2030	0.56%	0.67%	Annualized change 2006-2030	-0.36%	-0.26%

Non-Primary Care Specialties

Figure 4 – Capital District Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	101	9.5
2010	105	9.9
2015	112	10.5
2020	119	11.2
2025	125	11.9
2030	129	12.4
Percent change 2006-2030	27.7%	31.0%
Annualized change 2006-2030	1.02%	1.13%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	343	32.2
2010	353	33.2
2015	370	34.8
2020	385	36.4
2025	398	37.9
2030	404	39.0
Percent change 2006-2030	17.8%	20.8%
Annualized change 2006-2030	0.68%	0.79%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	135	12.7
2010	135	12.7
2015	133	12.5
2020	131	12.4
2025	129	12.3
2030	127	12.3
Percent change 2006-2030	-5.9%	-3.5%
Annualized change 2006-2030	-0.25%	-0.15%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	80	7.5
2010	82	7.7
2015	84	7.9
2020	86	8.1
2025	88	8.4
2030	89	8.6
Percent change 2006-2030	11.3%	14.1%
Annualized change 2006-2030	0.45%	0.55%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	188	17.7
2010	190	17.9
2015	191	18.0
2020	192	18.1
2025	193	18.4
2030	193	18.6
Percent change 2006-2030	2.7%	5.3%
Annualized change 2006-2030	0.11%	0.22%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	137	12.9
2010	140	13.2
2015	145	13.6
2020	152	14.4
2025	158	15.0
2030	161	15.5
Percent change 2006-2030	17.5%	20.6%
Annualized change 2006-2030	0.67%	0.78%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	163	15.3
2010	166	15.6
2015	172	16.2
2020	179	16.9
2025	187	17.8
2030	191	18.4
Percent change 2006-2030	17.2%	20.2%
Annualized change 2006-2030	0.66%	0.77%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	153	14.4
2010	153	14.4
2015	154	14.5
2020	155	14.6
2025	156	14.8
2030	156	15.0
Percent change 2006-2030	2.0%	4.6%
Annualized change 2006-2030	0.08%	0.19%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	9.7
2010	106	10.0
2015	109	10.3
2020	113	10.7
2025	116	11.0
2030	117	11.3
Percent change 2006-2030	13.6%	16.5%
Annualized change 2006-2030	0.53%	0.64%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	98	9.2
2010	101	9.5
2015	105	9.9
2020	111	10.5
2025	116	11.0
2030	119	11.5
Percent change 2006-2030	21.4%	24.6%
Annualized change 2006-2030	0.81%	0.92%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	35	3.3
2020	36	3.4
2025	37	3.5
2030	37	3.6
Percent change 2006-2030	8.8%	11.6%
Annualized change 2006-2030	0.35%	0.46%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	92	8.6
2010	94	8.8
2015	97	9.1
2020	100	9.4
2025	104	9.9
2030	105	10.1
Percent change 2006-2030	14.1%	17.1%
Annualized change 2006-2030	0.55%	0.66%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	53	5.0
2010	55	5.2
2015	57	5.4
2020	60	5.7
2025	63	6.0
2030	64	6.2
Percent change 2006-2030	20.8%	23.9%
Annualized change 2006-2030	0.79%	0.90%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	80	7.5
2010	82	7.7
2015	86	8.1
2020	89	8.4
2025	91	8.7
2030	92	8.9
Percent change 2006-2030	15.0%	18.0%
Annualized change 2006-2030	0.58%	0.69%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	286	26.9
2010	292	27.5
2015	300	28.2
2020	308	29.1
2025	316	30.1
2030	320	30.9
Percent change 2006-2030	11.9%	14.8%
Annualized change 2006-2030	0.47%	0.58%

Capital District Demand Scenario 2: Growing Economy

Figure 5 – Capital District Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,071	288.7
2010	3,180	299.1
2015	3,344	314.6
2020	3,523	332.6
2025	3,704	352.5
2030	3,835	370.0
Percent change 2006-2030	24.9%	28.1%
Annualized change 2006-2030	0.93%	1.04%

Figure 6 – Capital District Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,041	97.9	2010	2,139	201.1
2015	1,074	101.1	2015	2,269	213.5
2020	1,112	105.0	2020	2,411	227.6
2025	1,150	109.5	2025	2,554	243.0
2030	1,171	113.0	2030	2,664	257.0
Percent change 2006-2030	14.3%	17.3%	Percent change 2006-2030	30.2%	33.6%
Annualized change 2006-2030	0.56%	0.67%	Annualized change 2006-2030	1.11%	1.21%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 7 – Capital District Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,041	97.9	2010	418	39.3
2015	1,074	101.1	2015	431	40.6
2020	1,112	105.0	2020	445	42.0
2025	1,150	109.5	2025	459	43.7
2030	1,171	113.0	2030	467	45.1
Percent change 2006-2030	14.3%	17.3%	Percent change 2006-2030	14.2%	17.2%
Annualized change 2006-2030	0.56%	0.67%	Annualized change 2006-2030	0.55%	0.66%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	415	39.0	2010	208	19.6
2015	434	40.9	2015	208	19.6
2020	457	43.1	2020	211	19.9
2025	478	45.5	2025	213	20.2
2030	493	47.5	2030	212	20.4
Percent change 2006-2030	22.9%	26.1%	Percent change 2006-2030	-1.6%	0.9%
Annualized change 2006-2030	0.86%	0.97%	Annualized change 2006-2030	-0.07%	0.04%

Non-Primary Care Specialties

Figure 8 – Capital District Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	101	9.5
2010	108	10.1
2015	119	11.2
2020	130	12.3
2025	141	13.5
2030	151	14.5
Percent change 2006-2030	49.1%	53.0%
Annualized change 2006-2030	1.68%	1.79%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	343	32.2
2010	362	34.1
2015	392	36.9
2020	421	39.8
2025	450	42.8
2030	472	45.5
Percent change 2006-2030	37.5%	41.1%
Annualized change 2006-2030	1.34%	1.45%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	135	12.7
2010	137	12.8
2015	137	12.9
2020	137	12.9
2025	136	13.0
2030	136	13.2
Percent change 2006-2030	1.0%	3.6%
Annualized change 2006-2030	0.04%	0.15%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	80	7.5
2010	84	7.9
2015	89	8.4
2020	94	8.9
2025	99	9.5
2030	104	10.0
Percent change 2006-2030	29.9%	33.3%
Annualized change 2006-2030	1.10%	1.20%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	188	17.7
2010	195	18.3
2015	202	19.0
2020	210	19.8
2025	218	20.8
2030	225	21.7
Percent change 2006-2030	19.9%	23.0%
Annualized change 2006-2030	0.76%	0.87%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	137	12.9
2010	144	13.5
2015	154	14.5
2020	166	15.7
2025	179	17.0
2030	188	18.1
Percent change 2006-2030	37.2%	40.8%
Annualized change 2006-2030	1.33%	1.44%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	163	15.3
2010	170	16.0
2015	182	17.2
2020	196	18.5
2025	211	20.1
2030	223	21.5
Percent change 2006-2030	36.8%	40.4%
Annualized change 2006-2030	1.32%	1.42%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	153	14.4
2010	155	14.6
2015	158	14.9
2020	162	15.3
2025	165	15.7
2030	168	16.2
Percent change 2006-2030	9.5%	12.3%
Annualized change 2006-2030	0.38%	0.49%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	9.7
2010	109	10.2
2015	116	10.9
2020	124	11.7
2025	131	12.5
2030	137	13.2
Percent change 2006-2030	32.6%	36.1%
Annualized change 2006-2030	1.18%	1.29%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	98	9.2
2010	104	9.7
2015	111	10.5
2020	122	11.5
2025	131	12.5
2030	139	13.4
Percent change 2006-2030	41.8%	45.5%
Annualized change 2006-2030	1.47%	1.57%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	34	3.2
2010	35	3.3
2015	37	3.5
2020	39	3.7
2025	42	4.0
2030	43	4.2
Percent change 2006-2030	27.1%	30.4%
Annualized change 2006-2030	1.00%	1.11%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	92	8.6
2010	96	9.1
2015	103	9.7
2020	109	10.3
2025	118	11.2
2030	123	11.8
Percent change 2006-2030	33.3%	36.7%
Annualized change 2006-2030	1.20%	1.31%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	53	5.0
2010	56	5.3
2015	60	5.7
2020	66	6.2
2025	71	6.8
2030	75	7.2
Percent change 2006-2030	41.0%	44.7%
Annualized change 2006-2030	1.44%	1.55%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	80	7.5
2010	84	7.9
2015	91	8.6
2020	97	9.2
2025	103	9.8
2030	107	10.4
Percent change 2006-2030	34.3%	37.8%
Annualized change 2006-2030	1.24%	1.34%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	286	26.9
2010	300	28.2
2015	318	29.9
2020	337	31.8
2025	357	34.0
2030	374	36.0
Percent change 2006-2030	30.7%	34.0%
Annualized change 2006-2030	1.12%	1.23%

Capital District Demand Scenario 3: Universal Health Insurance by 2020

Figure 9 – Capital District Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,071	288.7
2010	3,157	296.9
2015	3,288	309.4
2020	3,433	324.1
2025	3,518	334.8
2030	3,550	342.5
Percent change 2006-2030	15.6%	18.6%
Annualized change 2006-2030	0.61%	0.71%

Figure 10 – Capital District Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,043	98.1	2010	2,114	198.8
2015	1,078	101.4	2015	2,211	208.0
2020	1,118	105.6	2020	2,315	218.5
2025	1,139	108.4	2025	2,379	226.4
2030	1,143	110.3	2030	2,407	232.2
Percent change 2006-2030	11.5%	14.4%	Percent change 2006-2030	17.6%	20.7%
Annualized change 2006-2030	0.46%	0.56%	Annualized change 2006-2030	0.68%	0.79%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 11 – Capital District Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,043	98.1	2010	417	39.2
2015	1,078	101.4	2015	429	40.4
2020	1,118	105.6	2020	441	41.7
2025	1,139	108.4	2025	449	42.7
2030	1,143	110.3	2030	450	43.4
Percent change 2006-2030	11.5%	14.4%	Percent change 2006-2030	10.0%	12.8%
Annualized change 2006-2030	0.46%	0.56%	Annualized change 2006-2030	0.40%	0.50%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	417	39.2	2010	209	19.6
2015	439	41.4	2015	209	19.7
2020	465	43.9	2020	212	20.0
2025	480	45.7	2025	211	20.0
2030	487	47.0	2030	206	19.9
Percent change 2006-2030	21.5%	24.6%	Percent change 2006-2030	-4.0%	-1.5%
Annualized change 2006-2030	0.81%	0.92%	Annualized change 2006-2030	-0.17%	-0.06%

Non-Primary Care Specialties

Figure 12 – Capital District Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	101	9.5
2010	106	10.0
2015	115	10.8
2020	124	11.7
2025	130	12.4
2030	135	13.0
Percent change 2006-2030	33.2%	36.7%
Annualized change 2006-2030	1.20%	1.31%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	343	32.2
2010	359	33.7
2015	384	36.1
2020	407	38.4
2025	421	40.1
2030	427	41.2
Percent change 2006-2030	24.5%	27.8%
Annualized change 2006-2030	0.92%	1.03%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	135	12.7
2010	137	12.9
2015	137	12.9
2020	137	13.0
2025	135	12.9
2030	133	12.8
Percent change 2006-2030	-1.4%	1.2%
Annualized change 2006-2030	-0.06%	0.05%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	80	7.5
2010	83	7.8
2015	87	8.2
2020	91	8.6
2025	93	8.9
2030	94	9.1
Percent change 2006-2030	18.0%	21.1%
Annualized change 2006-2030	0.69%	0.80%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	188	17.7
2010	193	18.1
2015	197	18.5
2020	201	19.0
2025	202	19.3
2030	202	19.5
Percent change 2006-2030	7.6%	10.4%
Annualized change 2006-2030	0.31%	0.41%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	137	12.9
2010	142	13.4
2015	150	14.1
2020	160	15.1
2025	167	15.9
2030	170	16.4
Percent change 2006-2030	23.9%	27.2%
Annualized change 2006-2030	0.90%	1.01%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	163	15.3
2010	169	15.9
2015	179	16.8
2020	190	17.9
2025	198	18.9
2030	203	19.5
Percent change 2006-2030	24.2%	27.5%
Annualized change 2006-2030	0.91%	1.02%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	153	14.4
2010	151	14.2
2015	149	14.0
2020	148	13.9
2025	149	14.1
2030	149	14.3
Percent change 2006-2030	-2.9%	-0.4%
Annualized change 2006-2030	-0.12%	-0.02%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	9.7
2010	108	10.1
2015	113	10.6
2020	119	11.2
2025	122	11.6
2030	123	11.9
Percent change 2006-2030	19.7%	22.8%
Annualized change 2006-2030	0.75%	0.86%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	98	9.2
2010	102	9.6
2015	106	10.0
2020	113	10.7
2025	118	11.3
2030	121	11.7
Percent change 2006-2030	24.0%	27.2%
Annualized change 2006-2030	0.90%	1.01%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	36	3.4
2020	37	3.5
2025	39	3.7
2030	39	3.7
Percent change 2006-2030	13.3%	16.2%
Annualized change 2006-2030	0.52%	0.63%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	92	8.6
2010	96	9.0
2015	101	9.5
2020	106	10.0
2025	111	10.5
2030	112	10.8
Percent change 2006-2030	21.4%	24.6%
Annualized change 2006-2030	0.81%	0.92%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	53	5.0
2010	56	5.3
2015	59	5.6
2020	63	6.0
2025	66	6.3
2030	68	6.5
Percent change 2006-2030	27.5%	30.8%
Annualized change 2006-2030	1.02%	1.12%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	80	7.5
2010	83	7.8
2015	89	8.4
2020	93	8.8
2025	96	9.1
2030	97	9.3
Percent change 2006-2030	20.8%	23.9%
Annualized change 2006-2030	0.79%	0.90%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	286	26.9
2010	296	27.8
2015	309	29.1
2020	323	30.5
2025	331	31.5
2030	335	32.4
Percent change 2006-2030	17.3%	20.3%
Annualized change 2006-2030	0.67%	0.77%

Capital District Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

Figure 13 – Capital District Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,071	288.7
2010	3,099	291.5
2015	3,155	296.9
2020	3,218	303.8
2025	3,273	311.5
2030	3,280	316.4
Percent change 2006-2030	6.8%	9.6%
Annualized change 2006-2030	0.27%	0.38%

Figure 14 – Capital District Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,025	96.4	2006	2,046	192.4
2010	1,029	96.8	2010	2,070	194.7
2015	1,046	98.4	2015	2,109	198.5
2020	1,067	100.7	2020	2,151	203.1
2025	1,087	103.5	2025	2,186	208.1
2030	1,091	105.2	2030	2,189	211.1
Percent change 2006-2030	6.4%	9.2%	Percent change 2006-2030	7.0%	9.8%
Annualized change 2006-2030	0.26%	0.37%	Annualized change 2006-2030	0.28%	0.39%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 15 – Capital District Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,025	96.4	2006	409	38.5
2010	1,029	96.8	2010	413	38.8
2015	1,046	98.4	2015	420	39.5
2020	1,067	100.7	2020	427	40.3
2025	1,087	103.5	2025	434	41.3
2030	1,091	105.2	2030	435	42.0
Percent change 2006-2030	6.4%	9.2%	Percent change 2006-2030	6.4%	9.1%
Annualized change 2006-2030	0.26%	0.37%	Annualized change 2006-2030	0.26%	0.36%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	401	37.7	2006	215	20.2
2010	410	38.6	2010	206	19.4
2015	423	39.8	2015	203	19.1
2020	438	41.4	2020	202	19.1
2025	452	43.0	2025	201	19.1
2030	459	44.3	2030	197	19.0
Percent change 2006-2030	14.5%	17.4%	Percent change 2006-2030	-8.4%	-6.0%
Annualized change 2006-2030	0.56%	0.67%	Annualized change 2006-2030	-0.36%	-0.26%

Non-Primary Care Specialties

Figure 16 – Capital District Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	101	9.5
2010	104	9.8
2015	110	10.3
2020	115	10.9
2025	120	11.4
2030	123	11.8
Percent change 2006-2030	21.3%	24.5%
Annualized change 2006-2030	0.81%	0.92%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	343	32.2
2010	350	32.9
2015	363	34.2
2020	374	35.3
2025	382	36.4
2030	384	37.0
Percent change 2006-2030	11.9%	14.8%
Annualized change 2006-2030	0.47%	0.58%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	135	12.7
2010	134	12.6
2015	130	12.3
2020	127	12.0
2025	124	11.8
2030	121	11.6
Percent change 2006-2030	-10.6%	-8.3%
Annualized change 2006-2030	-0.47%	-0.36%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	80	7.5
2010	81	7.6
2015	82	7.8
2020	83	7.9
2025	84	8.0
2030	85	8.2
Percent change 2006-2030	5.7%	8.4%
Annualized change 2006-2030	0.23%	0.34%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	188	17.7
2010	188	17.7
2015	187	17.6
2020	186	17.6
2025	185	17.6
2030	183	17.7
Percent change 2006-2030	-2.5%	0.1%
Annualized change 2006-2030	-0.10%	0.00%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	137	12.9
2010	139	13.1
2015	142	13.4
2020	148	13.9
2025	152	14.4
2030	153	14.8
Percent change 2006-2030	11.6%	14.5%
Annualized change 2006-2030	0.46%	0.57%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	163	15.3
2010	165	15.5
2015	169	15.9
2020	174	16.4
2025	180	17.1
2030	181	17.5
Percent change 2006-2030	11.3%	14.2%
Annualized change 2006-2030	0.45%	0.56%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	153	14.4
2010	152	14.3
2015	151	14.2
2020	150	14.2
2025	150	14.3
2030	148	14.3
Percent change 2006-2030	-3.1%	-0.6%
Annualized change 2006-2030	-0.13%	-0.03%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	9.7
2010	105	9.9
2015	107	10.1
2020	110	10.4
2025	111	10.6
2030	111	10.7
Percent change 2006-2030	7.9%	10.7%
Annualized change 2006-2030	0.32%	0.43%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	98	9.2
2010	100	9.4
2015	103	9.7
2020	108	10.2
2025	111	10.6
2030	113	10.9
Percent change 2006-2030	15.4%	18.4%
Annualized change 2006-2030	0.60%	0.70%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	34	3.2
2010	34	3.2
2015	34	3.2
2020	35	3.3
2025	36	3.4
2030	35	3.4
Percent change 2006-2030	3.4%	6.1%
Annualized change 2006-2030	0.14%	0.25%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	92	8.6
2010	93	8.8
2015	95	9.0
2020	97	9.2
2025	100	9.5
2030	100	9.6
Percent change 2006-2030	8.4%	11.2%
Annualized change 2006-2030	0.34%	0.44%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	53	5.0
2010	55	5.1
2015	56	5.3
2020	58	5.5
2025	60	5.8
2030	61	5.9
Percent change 2006-2030	14.7%	17.7%
Annualized change 2006-2030	0.57%	0.68%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	80	7.5
2010	81	7.6
2015	84	7.9
2020	86	8.2
2025	87	8.3
2030	87	8.4
Percent change 2006-2030	9.2%	12.1%
Annualized change 2006-2030	0.37%	0.48%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	286	26.9
2010	290	27.2
2015	294	27.7
2020	299	28.2
2025	303	28.9
2030	304	29.3
Percent change 2006-2030	6.3%	9.1%
Annualized change 2006-2030	0.25%	0.36%

Central New York Physician Demand Forecasts, 2006 – 2030

Central New York Demand Scenario 1: Baseline

Figure 17 – Central New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,233	311.9
2010	2,226	314.9
2015	2,224	319.5
2020	2,230	326.3
2025	2,232	334.0
2030	2,210	340.0
Percent change 2006-2030	-1.0%	9.0%
Annualized change 2006-2030	-0.04%	0.36%

Figure 18 – Central New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	658	93.1	2010	1,568	221.8
2015	656	94.2	2015	1,568	225.2
2020	657	96.1	2020	1,573	230.1
2025	657	98.3	2025	1,575	235.7
2030	651	100.1	2030	1,559	239.8
Percent change 2006-2030	-2.0%	8.0%	Percent change 2006-2030	-0.6%	9.4%
Annualized change 2006-2030	-0.08%	0.32%	Annualized change 2006-2030	-0.03%	0.38%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 19 – Central New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	658	93.1	2010	256	36.2
2015	656	94.2	2015	256	36.8
2020	657	96.1	2020	256	37.5
2025	657	98.3	2025	256	38.3
2030	651	100.1	2030	254	39.1
Percent change 2006-2030	-2.0%	8.0%	Percent change 2006-2030	-0.8%	9.3%
Annualized change 2006-2030	-0.08%	0.32%	Annualized change 2006-2030	-0.03%	0.37%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	251	35.5	2010	151	21.4
2015	253	36.3	2015	147	21.1
2020	255	37.3	2020	146	21.4
2025	258	38.6	2025	143	21.4
2030	258	39.7	2030	139	21.4
Percent change 2006-2030	3.2%	13.7%	Percent change 2006-2030	-12.0%	-3.1%
Annualized change 2006-2030	0.13%	0.54%	Annualized change 2006-2030	-0.53%	-0.13%

Non-Primary Care Specialties

Figure 20 – Central New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	71	9.9	2006	252	35.2
2010	72	10.2	2010	254	35.9
2015	73	10.5	2015	256	36.8
2020	75	11.0	2020	258	37.7
2025	77	11.5	2025	260	38.9
2030	78	12.0	2030	258	39.7
Percent change 2006-2030	9.9%	21.0%	Percent change 2006-2030	2.4%	12.8%
Annualized change 2006-2030	0.39%	0.80%	Annualized change 2006-2030	0.10%	0.50%

Obstetrics and Gynecology			Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	116	16.2	2006	66	9.2
2010	114	16.1	2010	66	9.3
2015	111	15.9	2015	66	9.5
2020	107	15.7	2020	66	9.7
2025	104	15.6	2025	66	9.9
2030	100	15.4	2030	65	10.0
Percent change 2006-2030	-13.8%	-5.0%	Percent change 2006-2030	-1.5%	8.5%
Annualized change 2006-2030	-0.62%	-0.22%	Annualized change 2006-2030	-0.06%	0.34%

Psychiatry			Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	125	17.5	2006	109	15.2
2010	124	17.5	2010	109	15.4
2015	122	17.5	2015	110	15.8
2020	120	17.6	2020	111	16.2
2025	117	17.5	2025	113	16.9
2030	114	17.5	2030	113	17.4
Percent change 2006-2030	-8.8%	0.5%	Percent change 2006-2030	3.7%	14.2%
Annualized change 2006-2030	-0.38%	0.02%	Annualized change 2006-2030	0.15%	0.55%

Radiology			Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	125	17.5	2006	111	15.5
2010	125	17.7	2010	109	15.4
2015	125	18.0	2015	108	15.5
2020	127	18.6	2020	106	15.5
2025	129	19.3	2025	104	15.6
2030	129	19.8	2030	102	15.7
Percent change 2006-2030	3.2%	13.7%	Percent change 2006-2030	-8.1%	1.2%
Annualized change 2006-2030	0.13%	0.54%	Annualized change 2006-2030	-0.35%	0.05%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	106	14.8
2010	107	15.1
2015	107	15.4
2020	108	15.8
2025	108	16.2
2030	107	16.5
Percent change 2006-2030	0.9%	11.2%
Annualized change 2006-2030	0.04%	0.44%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	8.4
2010	60	8.5
2015	61	8.8
2020	63	9.2
2025	64	9.6
2030	64	9.8
Percent change 2006-2030	6.7%	17.5%
Annualized change 2006-2030	0.27%	0.67%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	43	6.2
2020	43	6.3
2025	43	6.4
2030	42	6.5
Percent change 2006-2030	-4.5%	5.1%
Annualized change 2006-2030	-0.19%	0.21%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	87	12.2
2010	87	12.3
2015	87	12.5
2020	88	12.9
2025	89	13.3
2030	89	13.7
Percent change 2006-2030	2.3%	12.7%
Annualized change 2006-2030	0.09%	0.50%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	34	4.7
2010	34	4.8
2015	35	5.0
2020	36	5.3
2025	36	5.4
2030	36	5.5
Percent change 2006-2030	5.9%	16.6%
Annualized change 2006-2030	0.24%	0.64%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	8.4
2010	60	8.5
2015	61	8.8
2020	62	9.1
2025	62	9.3
2030	61	9.4
Percent change 2006-2030	1.7%	12.0%
Annualized change 2006-2030	0.07%	0.47%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	203	28.4
2010	203	28.7
2015	203	29.2
2020	203	29.7
2025	203	30.4
2030	201	30.9
Percent change 2006-2030	-1.0%	9.1%
Annualized change 2006-2030	-0.04%	0.36%

Central New York Demand Scenario 2: Growing Economy

Figure 21 – Central New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,233	311.9
2010	2,272	321.3
2015	2,328	334.5
2020	2,396	350.5
2025	2,461	368.2
2030	2,500	384.7
Percent change 2006-2030	12.0%	23.3%
Annualized change 2006-2030	0.47%	0.88%

Figure 22 – Central New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	666	94.2	2010	1,606	227.2
2015	674	96.8	2015	1,655	237.7
2020	685	100.2	2020	1,711	250.3
2025	695	104.0	2025	1,766	264.2
2030	699	107.5	2030	1,801	277.1
Percent change 2006-2030	5.3%	16.0%	Percent change 2006-2030	14.8%	26.5%
Annualized change 2006-2030	0.21%	0.62%	Annualized change 2006-2030	0.58%	0.98%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 23 – Central New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	666	94.2	2010	259	36.6
2015	674	96.8	2015	263	37.8
2020	685	100.2	2020	267	39.0
2025	695	104.0	2025	271	40.5
2030	699	107.5	2030	273	42.0
Percent change 2006-2030	5.3%	16.0%	Percent change 2006-2030	6.5%	17.4%
Annualized change 2006-2030	0.21%	0.62%	Annualized change 2006-2030	0.26%	0.67%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	254	35.9	2010	153	21.6
2015	260	37.3	2015	151	21.7
2020	266	38.9	2020	152	22.3
2025	273	40.8	2025	151	22.6
2030	277	42.6	2030	149	23.0
Percent change 2006-2030	10.8%	22.1%	Percent change 2006-2030	-5.5%	4.1%
Annualized change 2006-2030	0.43%	0.83%	Annualized change 2006-2030	-0.24%	0.17%

Non-Primary Care Specialties

Figure 24 – Central New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	71	9.9
2010	74	10.5
2015	77	11.1
2020	82	12.0
2025	87	13.0
2030	91	14.0
Percent change 2006-2030	28.3%	41.3%
Annualized change 2006-2030	1.04%	1.45%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	252	35.2
2010	261	36.9
2015	271	39.0
2020	282	41.3
2025	294	44.0
2030	301	46.3
Percent change 2006-2030	19.6%	31.7%
Annualized change 2006-2030	0.75%	1.15%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	116	16.2
2010	115	16.3
2015	114	16.4
2020	112	16.3
2025	110	16.5
2030	107	16.5
Percent change 2006-2030	-7.4%	2.0%
Annualized change 2006-2030	-0.32%	0.08%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	66	9.2
2010	68	9.6
2015	70	10.0
2020	72	10.6
2025	75	11.2
2030	76	11.7
Percent change 2006-2030	15.0%	26.7%
Annualized change 2006-2030	0.58%	0.99%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	125	17.5
2010	127	18.0
2015	129	18.6
2020	131	19.2
2025	132	19.8
2030	133	20.5
Percent change 2006-2030	6.5%	17.3%
Annualized change 2006-2030	0.26%	0.67%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	109	15.2
2010	112	15.8
2015	117	16.7
2020	122	17.8
2025	128	19.1
2030	132	20.3
Percent change 2006-2030	21.1%	33.3%
Annualized change 2006-2030	0.80%	1.21%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	125	17.5
2010	128	18.1
2015	132	19.0
2020	139	20.3
2025	146	21.8
2030	151	23.2
Percent change 2006-2030	20.5%	32.7%
Annualized change 2006-2030	0.78%	1.19%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	111	15.5
2010	110	15.6
2015	111	15.9
2020	110	16.2
2025	110	16.5
2030	110	16.8
Percent change 2006-2030	-1.3%	8.7%
Annualized change 2006-2030	-0.06%	0.35%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	106	14.8
2010	110	15.5
2015	113	16.3
2020	118	17.3
2025	122	18.3
2030	125	19.2
Percent change 2006-2030	17.9%	29.8%
Annualized change 2006-2030	0.69%	1.09%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	8.4
2010	62	8.7
2015	65	9.3
2020	69	10.1
2025	72	10.8
2030	75	11.5
Percent change 2006-2030	24.6%	37.2%
Annualized change 2006-2030	0.92%	1.33%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	44	6.1
2010	45	6.4
2015	46	6.5
2020	47	6.9
2025	49	7.3
2030	49	7.5
Percent change 2006-2030	11.5%	22.8%
Annualized change 2006-2030	0.45%	0.86%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	87	12.2
2010	89	12.6
2015	92	13.2
2020	96	14.1
2025	101	15.1
2030	104	16.0
Percent change 2006-2030	19.5%	31.6%
Annualized change 2006-2030	0.74%	1.15%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	34	4.7
2010	35	4.9
2015	37	5.3
2020	39	5.8
2025	41	6.1
2030	42	6.5
Percent change 2006-2030	23.6%	36.2%
Annualized change 2006-2030	0.89%	1.30%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	8.4
2010	62	8.7
2015	65	9.3
2020	68	9.9
2025	70	10.5
2030	71	11.0
Percent change 2006-2030	18.7%	30.8%
Annualized change 2006-2030	0.72%	1.12%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	203	28.4
2010	208	29.5
2015	215	30.9
2020	222	32.5
2025	230	34.3
2030	235	36.1
Percent change 2006-2030	15.6%	27.4%
Annualized change 2006-2030	0.61%	1.01%

Central New York Demand Scenario 3: Universal Health Insurance by 2020

Figure 25 – Central New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,233	311.9
2010	2,254	318.9
2015	2,289	328.8
2020	2,332	341.2
2025	2,335	349.4
2030	2,312	355.6
Percent change 2006-2030	3.5%	14.0%
Annualized change 2006-2030	0.14%	0.55%

Figure 26 – Central New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	667	94.3	2010	1,588	224.6
2015	676	97.1	2015	1,613	231.7
2020	688	100.7	2020	1,644	240.5
2025	688	103.0	2025	1,646	246.4
2030	682	104.9	2030	1,630	250.7
Percent change 2006-2030	2.7%	13.1%	Percent change 2006-2030	3.9%	14.4%
Annualized change 2006-2030	0.11%	0.52%	Annualized change 2006-2030	0.16%	0.56%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 27 – Central New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	667	94.3	2010	258	36.6
2015	676	97.1	2015	262	37.6
2020	688	100.7	2020	265	38.7
2025	688	103.0	2025	265	39.6
2030	682	104.9	2030	263	40.4
Percent change 2006-2030	2.7%	13.1%	Percent change 2006-2030	2.6%	13.0%
Annualized change 2006-2030	0.11%	0.52%	Annualized change 2006-2030	0.11%	0.51%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	255	36.1	2010	153	21.6
2015	263	37.8	2015	151	21.8
2020	271	39.6	2020	153	22.4
2025	274	41.0	2025	150	22.4
2030	274	42.1	2030	146	22.4
Percent change 2006-2030	9.5%	20.6%	Percent change 2006-2030	-7.8%	1.5%
Annualized change 2006-2030	0.38%	0.79%	Annualized change 2006-2030	-0.34%	0.06%

Non-Primary Care Specialties

Figure 28 – Central New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases			Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	71	9.9	2006	252	35.2
2010	73	10.3	2010	258	36.5
2015	75	10.8	2015	265	38.1
2020	78	11.4	2020	273	39.9
2025	80	12.0	2025	275	41.1
2030	81	12.5	2030	273	42.0
Percent change 2006-2030	14.6%	26.2%	Percent change 2006-2030	8.3%	19.2%
Annualized change 2006-2030	0.57%	0.97%	Annualized change 2006-2030	0.33%	0.74%

Obstetrics and Gynecology			Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	116	16.2	2006	66	9.2
2010	116	16.3	2010	67	9.5
2015	114	16.4	2015	69	9.8
2020	112	16.4	2020	70	10.2
2025	109	16.3	2025	70	10.5
2030	105	16.1	2030	69	10.6
Percent change 2006-2030	-9.6%	-0.5%	Percent change 2006-2030	4.5%	15.1%
Annualized change 2006-2030	-0.42%	-0.02%	Annualized change 2006-2030	0.18%	0.59%

Psychiatry			Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	125	17.5	2006	109	15.2
2010	126	17.8	2010	111	15.7
2015	126	18.1	2015	114	16.4
2020	126	18.4	2020	117	17.1
2025	123	18.4	2025	119	17.8
2030	120	18.4	2030	119	18.3
Percent change 2006-2030	-4.4%	5.3%	Percent change 2006-2030	9.3%	20.4%
Annualized change 2006-2030	-0.19%	0.22%	Annualized change 2006-2030	0.37%	0.78%

Radiology			Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	125	17.5	2006	111	15.5
2010	127	18.0	2010	107	15.2
2015	130	18.6	2015	105	15.0
2020	135	19.7	2020	101	14.8
2025	137	20.5	2025	99	14.8
2030	137	21.0	2030	97	14.9
Percent change 2006-2030	9.4%	20.5%	Percent change 2006-2030	-12.5%	-3.6%
Annualized change 2006-2030	0.38%	0.78%	Annualized change 2006-2030	-0.56%	-0.15%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	106	14.8
2010	109	15.4
2015	111	15.9
2020	114	16.7
2025	114	17.0
2030	113	17.3
Percent change 2006-2030	6.4%	17.2%
Annualized change 2006-2030	0.26%	0.66%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	8.4
2010	60	8.5
2015	62	8.9
2020	64	9.4
2025	65	9.8
2030	65	10.0
Percent change 2006-2030	8.9%	19.9%
Annualized change 2006-2030	0.36%	0.76%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	44	6.1
2010	45	6.3
2015	44	6.3
2020	45	6.5
2025	45	6.7
2030	44	6.7
Percent change 2006-2030	-0.6%	9.5%
Annualized change 2006-2030	-0.03%	0.38%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	87	12.2
2010	89	12.5
2015	91	13.0
2020	94	13.7
2025	95	14.2
2030	95	14.6
Percent change 2006-2030	8.8%	19.9%
Annualized change 2006-2030	0.35%	0.76%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	34	4.7
2010	35	4.9
2015	36	5.2
2020	38	5.6
2025	38	5.7
2030	38	5.8
Percent change 2006-2030	11.8%	23.1%
Annualized change 2006-2030	0.46%	0.87%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	8.4
2010	61	8.6
2015	63	9.0
2020	65	9.5
2025	65	9.7
2030	64	9.9
Percent change 2006-2030	6.8%	17.6%
Annualized change 2006-2030	0.27%	0.68%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	203	28.4
2010	206	29.1
2015	209	30.1
2020	213	31.1
2025	213	31.8
2030	211	32.4
Percent change 2006-2030	3.8%	14.3%
Annualized change 2006-2030	0.15%	0.56%

Central New York Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

Figure 29 – Central New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,233	311.9
2010	2,213	313.0
2015	2,194	315.2
2020	2,184	319.5
2025	2,169	324.7
2030	2,132	328.0
Percent change 2006-2030	-4.5%	5.2%
Annualized change 2006-2030	-0.19%	0.21%

Figure 30 – Central New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	664	92.7	2006	1,569	219.1
2010	658	93.1	2010	1,555	219.9
2015	656	94.2	2015	1,538	220.9
2020	657	96.1	2020	1,527	223.4
2025	657	98.3	2025	1,512	226.3
2030	651	100.1	2030	1,481	227.8
Percent change 2006-2030	-2.0%	8.0%	Percent change 2006-2030	-5.6%	4.0%
Annualized change 2006-2030	-0.08%	0.32%	Annualized change 2006-2030	-0.24%	0.16%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 31 – Central New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	664	92.7	2006	256	35.8
2010	658	93.1	2010	256	36.2
2015	656	94.2	2015	256	36.8
2020	657	96.1	2020	256	37.5
2025	657	98.3	2025	256	38.3
2030	651	100.1	2030	254	39.1
Percent change 2006-2030	-2.0%	8.0%	Percent change 2006-2030	-0.8%	9.3%
Annualized change 2006-2030	-0.08%	0.32%	Annualized change 2006-2030	-0.03%	0.37%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	250	34.9	2006	158	22.1
2010	251	35.5	2010	151	21.4
2015	253	36.3	2015	147	21.1
2020	255	37.3	2020	146	21.4
2025	258	38.6	2025	143	21.4
2030	258	39.7	2030	139	21.4
Percent change 2006-2030	3.2%	13.7%	Percent change 2006-2030	-12.0%	-3.1%
Annualized change 2006-2030	0.13%	0.54%	Annualized change 2006-2030	-0.53%	-0.13%

Non-Primary Care Specialties

Figure 32 – Central New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	71	9.9
2010	71	10.1
2015	72	10.3
2020	73	10.6
2025	74	11.1
2030	74	11.4
Percent change 2006-2030	4.4%	15.0%
Annualized change 2006-2030	0.18%	0.58%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	252	35.2
2010	252	35.6
2015	251	36.1
2020	250	36.6
2025	250	37.4
2030	245	37.7
Percent change 2006-2030	-2.7%	7.1%
Annualized change 2006-2030	-0.12%	0.29%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	116	16.2
2010	113	16.0
2015	109	15.6
2020	104	15.2
2025	100	14.9
2030	95	14.6
Percent change 2006-2030	-18.1%	-9.8%
Annualized change 2006-2030	-0.83%	-0.43%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	66	9.2
2010	65	9.3
2015	65	9.3
2020	64	9.4
2025	63	9.5
2030	62	9.5
Percent change 2006-2030	-6.4%	3.1%
Annualized change 2006-2030	-0.28%	0.13%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	125	17.5
2010	123	17.4
2015	120	17.2
2020	116	17.0
2025	112	16.8
2030	108	16.7
Percent change 2006-2030	-13.4%	-4.6%
Annualized change 2006-2030	-0.60%	-0.19%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	109	15.2
2010	108	15.3
2015	108	15.5
2020	108	15.8
2025	109	16.2
2030	107	16.5
Percent change 2006-2030	-1.5%	8.5%
Annualized change 2006-2030	-0.06%	0.34%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	125	17.5
2010	124	17.5
2015	123	17.6
2020	123	18.0
2025	124	18.5
2030	123	18.9
Percent change 2006-2030	-2.0%	8.0%
Annualized change 2006-2030	-0.08%	0.32%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	111	15.5
2010	108	15.3
2015	106	15.2
2020	103	15.1
2025	100	14.9
2030	97	14.9
Percent change 2006-2030	-12.7%	-3.8%
Annualized change 2006-2030	-0.56%	-0.16%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	106	14.8
2010	106	15.0
2015	105	15.1
2020	105	15.3
2025	104	15.5
2030	102	15.6
Percent change 2006-2030	-4.1%	5.6%
Annualized change 2006-2030	-0.17%	0.23%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	8.4
2010	59	8.4
2015	60	8.6
2020	61	8.9
2025	61	9.2
2030	61	9.4
Percent change 2006-2030	1.3%	11.6%
Annualized change 2006-2030	0.06%	0.46%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	44	6.1
2010	44	6.2
2015	42	6.1
2020	42	6.1
2025	41	6.2
2030	40	6.1
Percent change 2006-2030	-9.3%	-0.1%
Annualized change 2006-2030	-0.41%	0.00%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	87	12.2
2010	86	12.2
2015	85	12.3
2020	85	12.5
2025	85	12.8
2030	85	13.0
Percent change 2006-2030	-2.8%	7.0%
Annualized change 2006-2030	-0.12%	0.28%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	34	4.7
2010	34	4.8
2015	34	4.9
2020	35	5.1
2025	35	5.2
2030	34	5.3
Percent change 2006-2030	0.6%	10.8%
Annualized change 2006-2030	0.02%	0.43%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	8.4
2010	59	8.4
2015	60	8.6
2020	60	8.8
2025	60	8.9
2030	58	8.9
Percent change 2006-2030	-3.4%	6.4%
Annualized change 2006-2030	-0.14%	0.26%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	203	28.4
2010	201	28.5
2015	199	28.6
2020	197	28.8
2025	195	29.2
2030	191	29.4
Percent change 2006-2030	-5.9%	3.6%
Annualized change 2006-2030	-0.25%	0.15%

Finger Lakes Physician Demand Forecasts, 2006 – 2030

Finger Lakes Demand Scenario 1: Baseline

Figure 33 – Finger Lakes Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,823	317.2
2010	3,861	320.1
2015	3,931	325.7
2020	4,010	332.6
2025	4,091	341.2
2030	4,118	347.1
Percent change 2006-2030	7.7%	9.5%
Annualized change 2006-2030	0.31%	0.38%

Figure 34 – Finger Lakes Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,330	110.3	2010	2,531	209.9
2015	1,352	112.0	2015	2,579	213.7
2020	1,380	114.5	2020	2,630	218.1
2025	1,406	117.3	2025	2,685	223.9
2030	1,415	119.3	2030	2,703	227.9
Percent change 2006-2030	6.9%	8.6%	Percent change 2006-2030	8.2%	9.9%
Annualized change 2006-2030	0.28%	0.34%	Annualized change 2006-2030	0.33%	0.39%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 35 – Finger Lakes Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,330	110.3	2010	332	27.5
2015	1,352	112.0	2015	338	28.0
2020	1,380	114.5	2020	344	28.5
2025	1,406	117.3	2025	350	29.2
2030	1,415	119.3	2030	352	29.7
Percent change 2006-2030	6.9%	8.6%	Percent change 2006-2030	7.3%	9.1%
Annualized change 2006-2030	0.28%	0.34%	Annualized change 2006-2030	0.29%	0.36%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	710	58.9	2010	288	23.9
2015	728	60.3	2015	286	23.7
2020	749	62.1	2020	287	23.8
2025	770	64.2	2025	286	23.9
2030	781	65.8	2030	282	23.8
Percent change 2006-2030	11.9%	13.7%	Percent change 2006-2030	-5.4%	-3.8%
Annualized change 2006-2030	0.47%	0.54%	Annualized change 2006-2030	-0.23%	-0.16%

Non-Primary Care Specialties

Figure 36 – Finger Lakes Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	102	8.5
2010	104	8.6
2015	109	9.0
2020	114	9.5
2025	119	9.9
2030	121	10.2
Percent change 2006-2030	18.6%	20.5%
Annualized change 2006-2030	0.71%	0.78%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	447	37.1
2010	456	37.8
2015	469	38.9
2020	482	40.0
2025	494	41.2
2030	498	42.0
Percent change 2006-2030	11.4%	13.2%
Annualized change 2006-2030	0.45%	0.52%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	198	16.4
2010	198	16.4
2015	195	16.2
2020	192	15.9
2025	189	15.8
2030	186	15.7
Percent change 2006-2030	-6.1%	-4.5%
Annualized change 2006-2030	-0.26%	-0.19%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	102	8.5
2010	104	8.6
2015	106	8.8
2020	107	8.9
2025	109	9.1
2030	109	9.2
Percent change 2006-2030	6.9%	8.6%
Annualized change 2006-2030	0.28%	0.34%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	211	17.5
2010	212	17.6
2015	212	17.6
2020	212	17.6
2025	212	17.7
2030	211	17.8
Percent change 2006-2030	0.0%	1.6%
Annualized change 2006-2030	0.00%	0.07%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	227	18.8
2010	230	19.1
2015	236	19.6
2020	244	20.2
2025	252	21.0
2030	255	21.5
Percent change 2006-2030	12.3%	14.2%
Annualized change 2006-2030	0.49%	0.55%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	206	17.1
2010	208	17.2
2015	213	17.6
2020	220	18.2
2025	228	19.0
2030	232	19.6
Percent change 2006-2030	12.6%	14.4%
Annualized change 2006-2030	0.50%	0.56%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	155	12.9
2010	155	12.9
2015	155	12.8
2020	156	12.9
2025	156	13.0
2030	155	13.1
Percent change 2006-2030	0.0%	1.6%
Annualized change 2006-2030	0.00%	0.07%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	128	10.6
2010	130	10.8
2015	134	11.1
2020	137	11.4
2025	140	11.7
2030	141	11.9
Percent change 2006-2030	10.2%	11.9%
Annualized change 2006-2030	0.40%	0.47%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	83	6.9
2010	85	7.0
2015	88	7.3
2020	91	7.5
2025	95	7.9
2030	97	8.2
Percent change 2006-2030	16.9%	18.8%
Annualized change 2006-2030	0.65%	0.72%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	44	3.7
2010	44	3.6
2015	45	3.7
2020	45	3.7
2025	46	3.8
2030	46	3.9
Percent change 2006-2030	4.5%	6.2%
Annualized change 2006-2030	0.19%	0.25%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	130	10.8
2010	132	10.9
2015	134	11.1
2020	138	11.4
2025	142	11.8
2030	144	12.1
Percent change 2006-2030	10.8%	12.6%
Annualized change 2006-2030	0.43%	0.49%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	42	3.5
2010	43	3.6
2015	45	3.7
2020	46	3.8
2025	48	4.0
2030	49	4.1
Percent change 2006-2030	16.7%	18.6%
Annualized change 2006-2030	0.64%	0.71%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	52	4.3
2010	53	4.4
2015	55	4.6
2020	56	4.6
2025	57	4.8
2030	58	4.9
Percent change 2006-2030	11.5%	13.3%
Annualized change 2006-2030	0.46%	0.52%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	372	30.9
2010	377	31.3
2015	383	31.7
2020	390	32.3
2025	398	33.2
2030	401	33.8
Percent change 2006-2030	7.8%	9.5%
Annualized change 2006-2030	0.31%	0.38%

Finger Lakes Demand Scenario 2: Growing Economy

Figure 37 – Finger Lakes Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,823	317.2
2010	3,938	326.5
2015	4,110	340.5
2020	4,299	356.6
2025	4,498	375.1
2030	4,644	391.5
Percent change 2006-2030	21.5%	23.4%
Annualized change 2006-2030	0.81%	0.88%

Figure 38 – Finger Lakes Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,346	111.6	2010	2,592	214.9
2015	1,389	115.0	2015	2,722	225.5
2020	1,438	119.3	2020	2,861	237.3
2025	1,487	124.1	2025	3,011	251.1
2030	1,519	128.1	2030	3,124	263.4
Percent change 2006-2030	14.8%	16.6%	Percent change 2006-2030	25.0%	27.0%
Annualized change 2006-2030	0.58%	0.64%	Annualized change 2006-2030	0.93%	1.00%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 39 – Finger Lakes Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,346	111.6	2010	336	27.9
2015	1,389	115.0	2015	347	28.8
2020	1,438	119.3	2020	359	29.7
2025	1,487	124.1	2025	370	30.9
2030	1,519	128.1	2030	378	31.9
Percent change 2006-2030	14.8%	16.6%	Percent change 2006-2030	15.2%	17.1%
Annualized change 2006-2030	0.58%	0.64%	Annualized change 2006-2030	0.59%	0.66%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	718	59.6	2010	291	24.2
2015	748	61.9	2015	294	24.3
2020	781	64.8	2020	299	24.8
2025	815	67.9	2025	303	25.2
2030	839	70.7	2030	303	25.5
Percent change 2006-2030	20.1%	22.1%	Percent change 2006-2030	1.6%	3.3%
Annualized change 2006-2030	0.77%	0.83%	Annualized change 2006-2030	0.07%	0.13%

Non-Primary Care Specialties

Figure 40 – Finger Lakes Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	102	8.5
2010	107	8.8
2015	116	9.6
2020	125	10.4
2025	135	11.2
2030	141	11.9
Percent change 2006-2030	38.5%	40.8%
Annualized change 2006-2030	1.37%	1.43%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	447	37.1
2010	468	38.8
2015	497	41.2
2020	528	43.8
2025	559	46.6
2030	582	49.0
Percent change 2006-2030	30.1%	32.2%
Annualized change 2006-2030	1.10%	1.17%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	198	16.4
2010	200	16.6
2015	200	16.6
2020	200	16.6
2025	200	16.7
2030	200	16.8
Percent change 2006-2030	0.9%	2.5%
Annualized change 2006-2030	0.04%	0.10%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	102	8.5
2010	107	8.8
2015	112	9.3
2020	117	9.7
2025	123	10.3
2030	127	10.7
Percent change 2006-2030	24.8%	26.8%
Annualized change 2006-2030	0.93%	0.99%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	211	17.5
2010	218	18.0
2015	225	18.6
2020	232	19.2
2025	240	20.0
2030	246	20.8
Percent change 2006-2030	16.8%	18.7%
Annualized change 2006-2030	0.65%	0.72%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	227	18.8
2010	236	19.6
2015	250	20.7
2020	267	22.2
2025	285	23.8
2030	298	25.1
Percent change 2006-2030	31.2%	33.3%
Annualized change 2006-2030	1.14%	1.20%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	206	17.1
2010	213	17.7
2015	226	18.7
2020	241	20.0
2025	258	21.5
2030	271	22.8
Percent change 2006-2030	31.5%	33.6%
Annualized change 2006-2030	1.15%	1.22%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	155	12.9
2010	157	13.0
2015	159	13.2
2020	163	13.5
2025	165	13.8
2030	166	14.0
Percent change 2006-2030	7.4%	9.1%
Annualized change 2006-2030	0.30%	0.36%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	128	10.6
2010	133	11.1
2015	142	11.8
2020	150	12.4
2025	158	13.2
2030	165	13.9
Percent change 2006-2030	28.6%	30.7%
Annualized change 2006-2030	1.05%	1.12%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	83	6.9
2010	87	7.2
2015	93	7.7
2020	100	8.3
2025	107	9.0
2030	113	9.5
Percent change 2006-2030	36.5%	38.7%
Annualized change 2006-2030	1.30%	1.37%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	44	3.7
2010	45	3.7
2015	48	4.0
2020	49	4.1
2025	52	4.3
2030	54	4.5
Percent change 2006-2030	22.1%	24.1%
Annualized change 2006-2030	0.83%	0.90%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	130	10.8
2010	135	11.2
2015	142	11.8
2020	151	12.5
2025	161	13.4
2030	168	14.2
Percent change 2006-2030	29.3%	31.4%
Annualized change 2006-2030	1.08%	1.15%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	42	3.5
2010	44	3.7
2015	48	4.0
2020	50	4.2
2025	54	4.5
2030	57	4.8
Percent change 2006-2030	36.2%	38.4%
Annualized change 2006-2030	1.30%	1.36%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	52	4.3
2010	54	4.5
2015	58	4.8
2020	61	5.1
2025	64	5.4
2030	68	5.7
Percent change 2006-2030	30.2%	32.3%
Annualized change 2006-2030	1.11%	1.17%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	372	30.9
2010	387	32.1
2015	406	33.6
2020	427	35.4
2025	450	37.5
2030	468	39.5
Percent change 2006-2030	25.9%	27.9%
Annualized change 2006-2030	0.96%	1.03%

Finger Lakes Demand Scenario 3: Universal Health Insurance by 2020

Figure 41 – Finger Lakes Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,823	317.2
2010	3,913	324.4
2015	4,051	335.6
2020	4,203	348.6
2025	4,288	357.6
2030	4,317	363.9
Percent change 2006-2030	12.9%	14.7%
Annualized change 2006-2030	0.51%	0.57%

Figure 42 – Finger Lakes Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,349	111.9	2010	2,564	212.6
2015	1,396	115.7	2015	2,655	219.9
2020	1,451	120.4	2020	2,752	228.2
2025	1,479	123.3	2025	2,810	234.3
2030	1,488	125.5	2030	2,829	238.5
Percent change 2006-2030	12.4%	14.2%	Percent change 2006-2030	13.2%	15.0%
Annualized change 2006-2030	0.49%	0.56%	Annualized change 2006-2030	0.52%	0.58%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 43 – Finger Lakes Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,349	111.9	2010	335	27.8
2015	1,396	115.7	2015	345	28.6
2020	1,451	120.4	2020	356	29.5
2025	1,479	123.3	2025	362	30.2
2030	1,488	125.5	2030	364	30.7
Percent change 2006-2030	12.4%	14.2%	Percent change 2006-2030	11.0%	12.7%
Annualized change 2006-2030	0.49%	0.56%	Annualized change 2006-2030	0.43%	0.50%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	722	59.9	2010	292	24.2
2015	756	62.7	2015	295	24.4
2020	795	65.9	2020	301	24.9
2025	817	68.2	2025	300	25.0
2030	829	69.9	2030	295	24.9
Percent change 2006-2030	18.7%	20.7%	Percent change 2006-2030	-0.8%	0.8%
Annualized change 2006-2030	0.72%	0.79%	Annualized change 2006-2030	-0.04%	0.03%

Non-Primary Care Specialties

Figure 44 – Finger Lakes Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	102	8.5
2010	105	8.7
2015	112	9.3
2020	119	9.9
2025	124	10.3
2030	126	10.6
Percent change 2006-2030	23.7%	25.7%
Annualized change 2006-2030	0.89%	0.96%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	447	37.1
2010	463	38.4
2015	486	40.3
2020	510	42.3
2025	522	43.6
2030	527	44.4
Percent change 2006-2030	17.8%	19.7%
Annualized change 2006-2030	0.69%	0.75%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	198	16.4
2010	201	16.6
2015	201	16.7
2020	201	16.7
2025	198	16.5
2030	195	16.4
Percent change 2006-2030	-1.5%	0.1%
Annualized change 2006-2030	-0.06%	0.00%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	102	8.5
2010	106	8.8
2015	110	9.1
2020	113	9.4
2025	116	9.6
2030	116	9.7
Percent change 2006-2030	13.3%	15.2%
Annualized change 2006-2030	0.52%	0.59%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	211	17.5
2010	215	17.8
2015	219	18.1
2020	222	18.4
2025	222	18.5
2030	221	18.6
Percent change 2006-2030	4.8%	6.5%
Annualized change 2006-2030	0.20%	0.26%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	227	18.8
2010	234	19.4
2015	244	20.2
2020	257	21.3
2025	266	22.2
2030	269	22.7
Percent change 2006-2030	18.5%	20.4%
Annualized change 2006-2030	0.71%	0.78%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	206	17.1
2010	212	17.5
2015	221	18.3
2020	233	19.3
2025	242	20.2
2030	246	20.7
Percent change 2006-2030	19.4%	21.3%
Annualized change 2006-2030	0.74%	0.81%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	155	12.9
2010	153	12.7
2015	150	12.4
2020	149	12.3
2025	149	12.4
2030	148	12.4
Percent change 2006-2030	-4.8%	-3.3%
Annualized change 2006-2030	-0.20%	-0.14%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	128	10.6
2010	132	10.9
2015	139	11.5
2020	144	12.0
2025	148	12.3
2030	149	12.5
Percent change 2006-2030	16.1%	18.0%
Annualized change 2006-2030	0.62%	0.69%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	83	6.9
2010	86	7.1
2015	89	7.4
2020	93	7.7
2025	97	8.1
2030	99	8.3
Percent change 2006-2030	19.3%	21.2%
Annualized change 2006-2030	0.74%	0.81%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	44	3.7
2010	45	3.7
2015	46	3.8
2020	47	3.9
2025	48	4.0
2030	48	4.0
Percent change 2006-2030	8.8%	10.6%
Annualized change 2006-2030	0.35%	0.42%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	130	10.8
2010	134	11.1
2015	139	11.6
2020	147	12.2
2025	151	12.6
2030	153	12.9
Percent change 2006-2030	17.8%	19.7%
Annualized change 2006-2030	0.69%	0.75%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	42	3.5
2010	44	3.6
2015	47	3.9
2020	49	4.0
2025	51	4.2
2030	52	4.4
Percent change 2006-2030	23.1%	25.1%
Annualized change 2006-2030	0.87%	0.94%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	52	4.3
2010	54	4.5
2015	57	4.7
2020	59	4.9
2025	60	5.0
2030	61	5.1
Percent change 2006-2030	17.1%	19.0%
Annualized change 2006-2030	0.66%	0.73%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	372	30.9
2010	382	31.7
2015	395	32.7
2020	409	33.9
2025	417	34.8
2030	420	35.4
Percent change 2006-2030	13.0%	14.8%
Annualized change 2006-2030	0.51%	0.58%

Finger Lakes Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

Figure 45 – Finger Lakes Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,823	317.2
2010	3,839	318.4
2015	3,882	321.6
2020	3,932	326.2
2025	3,984	332.3
2030	3,983	335.8
Percent change 2006-2030	4.2%	5.9%
Annualized change 2006-2030	0.17%	0.24%

Figure 46 – Finger Lakes Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,324	109.8	2006	2,499	207.3
2010	1,330	110.3	2010	2,509	208.1
2015	1,352	112.0	2015	2,530	209.6
2020	1,380	114.5	2020	2,552	211.7
2025	1,406	117.3	2025	2,578	215.0
2030	1,415	119.3	2030	2,568	216.5
Percent change 2006-2030	6.9%	8.6%	Percent change 2006-2030	2.8%	4.4%
Annualized change 2006-2030	0.28%	0.34%	Annualized change 2006-2030	0.11%	0.18%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 47 – Finger Lakes Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,324	109.8	2006	328	27.2
2010	1,330	110.3	2010	332	27.5
2015	1,352	112.0	2015	338	28.0
2020	1,380	114.5	2020	344	28.5
2025	1,406	117.3	2025	350	29.2
2030	1,415	119.3	2030	352	29.7
Percent change 2006-2030	6.9%	8.6%	Percent change 2006-2030	7.3%	9.1%
Annualized change 2006-2030	0.28%	0.34%	Annualized change 2006-2030	0.29%	0.36%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	698	57.9	2006	298	24.7
2010	710	58.9	2010	288	23.9
2015	728	60.3	2015	286	23.7
2020	749	62.1	2020	287	23.8
2025	770	64.2	2025	286	23.9
2030	781	65.8	2030	282	23.8
Percent change 2006-2030	11.9%	13.7%	Percent change 2006-2030	-5.4%	-3.8%
Annualized change 2006-2030	0.47%	0.54%	Annualized change 2006-2030	-0.23%	-0.16%

Non-Primary Care Specialties

Figure 48 – Finger Lakes Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	102	8.5
2010	103	8.6
2015	107	8.9
2020	111	9.2
2025	114	9.5
2030	115	9.7
Percent change 2006-2030	12.7%	14.5%
Annualized change 2006-2030	0.50%	0.57%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	447	37.1
2010	452	37.5
2015	460	38.1
2020	468	38.8
2025	474	39.6
2030	473	39.9
Percent change 2006-2030	5.8%	7.5%
Annualized change 2006-2030	0.24%	0.30%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	198	16.4
2010	196	16.3
2015	191	15.8
2020	186	15.5
2025	181	15.1
2030	177	14.9
Percent change 2006-2030	-10.8%	-9.3%
Annualized change 2006-2030	-0.47%	-0.41%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	102	8.5
2010	103	8.6
2015	104	8.6
2020	104	8.6
2025	105	8.7
2030	104	8.7
Percent change 2006-2030	1.5%	3.2%
Annualized change 2006-2030	0.06%	0.13%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	211	17.5
2010	210	17.4
2015	208	17.2
2020	206	17.1
2025	204	17.0
2030	200	16.9
Percent change 2006-2030	-5.0%	-3.5%
Annualized change 2006-2030	-0.21%	-0.15%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	227	18.8
2010	228	18.9
2015	232	19.2
2020	237	19.6
2025	242	20.2
2030	242	20.4
Percent change 2006-2030	6.7%	8.4%
Annualized change 2006-2030	0.27%	0.34%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	206	17.1
2010	206	17.1
2015	209	17.3
2020	214	17.7
2025	219	18.3
2030	220	18.6
Percent change 2006-2030	7.0%	8.7%
Annualized change 2006-2030	0.28%	0.35%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	155	12.9
2010	154	12.7
2015	152	12.6
2020	151	12.6
2025	150	12.5
2030	147	12.4
Percent change 2006-2030	-5.0%	-3.5%
Annualized change 2006-2030	-0.21%	-0.15%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	128	10.6
2010	129	10.7
2015	131	10.9
2020	133	11.0
2025	134	11.2
2030	134	11.3
Percent change 2006-2030	4.6%	6.3%
Annualized change 2006-2030	0.19%	0.26%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	83	6.9
2010	84	7.0
2015	86	7.2
2020	88	7.3
2025	91	7.6
2030	92	7.8
Percent change 2006-2030	11.0%	12.8%
Annualized change 2006-2030	0.44%	0.50%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	44	3.7
2010	44	3.6
2015	44	3.7
2020	44	3.6
2025	44	3.7
2030	44	3.7
Percent change 2006-2030	-0.7%	0.9%
Annualized change 2006-2030	-0.03%	0.04%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	130	10.8
2010	131	10.9
2015	131	10.9
2020	134	11.1
2025	136	11.4
2030	137	11.5
Percent change 2006-2030	5.2%	6.9%
Annualized change 2006-2030	0.21%	0.28%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	42	3.5
2010	43	3.5
2015	44	3.7
2020	45	3.7
2025	46	3.8
2030	47	3.9
Percent change 2006-2030	10.8%	12.6%
Annualized change 2006-2030	0.43%	0.50%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	52	4.3
2010	53	4.4
2015	54	4.5
2020	54	4.5
2025	55	4.6
2030	55	4.6
Percent change 2006-2030	6.0%	7.7%
Annualized change 2006-2030	0.24%	0.31%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	372	30.9
2010	374	31.0
2015	376	31.1
2020	379	31.4
2025	382	31.9
2030	381	32.1
Percent change 2006-2030	2.4%	4.1%
Annualized change 2006-2030	0.10%	0.17%

Hudson Valley Physician Demand Forecasts, 2006 – 2030

Hudson Valley Demand Scenario 1: Baseline

Figure 49 – Hudson Valley Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8,274	362.6
2010	8,460	366.3
2015	8,704	371.3
2020	8,966	377.2
2025	9,236	384.5
2030	9,415	389.8
Percent change 2006-2030	13.8%	7.5%
Annualized change 2006-2030	0.54%	0.30%

Figure 50 – Hudson Valley Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,830	122.5	2010	5,630	243.8
2015	2,900	123.7	2015	5,804	247.6
2020	2,989	125.7	2020	5,977	251.4
2025	3,084	128.4	2025	6,152	256.1
2030	3,147	130.3	2030	6,268	259.5
Percent change 2006-2030	12.9%	6.7%	Percent change 2006-2030	14.2%	7.9%
Annualized change 2006-2030	0.51%	0.27%	Annualized change 2006-2030	0.56%	0.32%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 51 – Hudson Valley Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,830	122.5	2010	572	24.8
2015	2,900	123.7	2015	589	25.1
2020	2,989	125.7	2020	607	25.5
2025	3,084	128.4	2025	625	26.0
2030	3,147	130.3	2030	638	26.4
Percent change 2006-2030	12.9%	6.7%	Percent change 2006-2030	14.3%	8.0%
Annualized change 2006-2030	0.51%	0.27%	Annualized change 2006-2030	0.56%	0.32%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,589	68.8	2010	669	29.0
2015	1,648	70.3	2015	663	28.3
2020	1,709	71.9	2020	673	28.3
2025	1,776	73.9	2025	683	28.4
2030	1,823	75.5	2030	686	28.4
Percent change 2006-2030	18.4%	11.8%	Percent change 2006-2030	-0.4%	-5.9%
Annualized change 2006-2030	0.71%	0.47%	Annualized change 2006-2030	-0.02%	-0.26%

Non-Primary Care Specialties

Figure 52 – Hudson Valley Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	224	9.8
2010	233	10.1
2015	245	10.5
2020	257	10.8
2025	271	11.3
2030	280	11.6
Percent change 2006-2030	25.0%	18.1%
Annualized change 2006-2030	0.93%	0.69%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	886	38.8
2010	916	39.7
2015	953	40.6
2020	987	41.5
2025	1,023	42.6
2030	1,045	43.3
Percent change 2006-2030	17.9%	11.4%
Annualized change 2006-2030	0.69%	0.45%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	404	17.7
2010	409	17.7
2015	412	17.6
2020	414	17.4
2025	413	17.2
2030	413	17.1
Percent change 2006-2030	2.2%	-3.4%
Annualized change 2006-2030	0.09%	-0.15%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	170	7.5
2010	175	7.6
2015	181	7.7
2020	186	7.8
2025	190	7.9
2030	193	8.0
Percent change 2006-2030	13.5%	7.2%
Annualized change 2006-2030	0.53%	0.29%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	837	36.7
2010	853	36.9
2015	868	37.0
2020	881	37.1
2025	891	37.1
2030	898	37.2
Percent change 2006-2030	7.3%	1.4%
Annualized change 2006-2030	0.29%	0.06%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	421	18.4
2010	432	18.7
2015	448	19.1
2020	466	19.6
2025	485	20.2
2030	498	20.6
Percent change 2006-2030	18.3%	11.7%
Annualized change 2006-2030	0.70%	0.46%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	363	15.9
2010	372	16.1
2015	385	16.4
2020	400	16.8
2025	417	17.4
2030	429	17.8
Percent change 2006-2030	18.2%	11.6%
Annualized change 2006-2030	0.70%	0.46%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	241	10.6
2010	244	10.6
2015	247	10.5
2020	251	10.6
2025	254	10.6
2030	256	10.6
Percent change 2006-2030	6.2%	0.3%
Annualized change 2006-2030	0.25%	0.01%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	268	11.7
2010	276	11.9
2015	287	12.2
2020	296	12.5
2025	306	12.7
2030	312	12.9
Percent change 2006-2030	16.4%	10.0%
Annualized change 2006-2030	0.64%	0.40%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	247	10.8
2010	255	11.0
2015	266	11.3
2020	278	11.7
2025	292	12.2
2030	301	12.5
Percent change 2006-2030	21.9%	15.1%
Annualized change 2006-2030	0.83%	0.59%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	4.5
2010	105	4.5
2015	107	4.6
2020	110	4.6
2025	112	4.7
2030	113	4.7
Percent change 2006-2030	9.7%	3.6%
Annualized change 2006-2030	0.39%	0.15%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	198	8.7
2010	203	8.8
2015	210	9.0
2020	218	9.2
2025	226	9.4
2030	232	9.6
Percent change 2006-2030	17.2%	10.7%
Annualized change 2006-2030	0.66%	0.42%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	4.5
2010	106	4.6
2015	111	4.7
2020	116	4.9
2025	121	5.0
2030	125	5.2
Percent change 2006-2030	21.4%	14.6%
Annualized change 2006-2030	0.81%	0.57%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	142	6.2
2010	147	6.4
2015	153	6.5
2020	158	6.6
2025	164	6.8
2030	167	6.9
Percent change 2006-2030	17.6%	11.1%
Annualized change 2006-2030	0.68%	0.44%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	880	38.6
2010	904	39.1
2015	931	39.7
2020	959	40.3
2025	987	41.1
2030	1,006	41.6
Percent change 2006-2030	14.3%	8.0%
Annualized change 2006-2030	0.56%	0.32%

Hudson Valley Demand Scenario 2: Growing Economy

Figure 53 – Hudson Valley Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8,274	362.6
2010	8,632	373.7
2015	9,108	388.5
2020	9,624	404.8
2025	10,170	423.4
2030	10,635	440.3
Percent change 2006-2030	28.5%	21.4%
Annualized change 2006-2030	1.05%	0.81%

Figure 54 – Hudson Valley Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,864	124.0	2010	5,768	249.7
2015	2,978	127.0	2015	6,130	261.5
2020	3,116	131.1	2020	6,508	273.8
2025	3,263	135.8	2025	6,907	287.6
2030	3,379	139.9	2030	7,256	300.4
Percent change 2006-2030	21.2%	14.5%	Percent change 2006-2030	32.2%	24.9%
Annualized change 2006-2030	0.81%	0.57%	Annualized change 2006-2030	1.17%	0.93%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 55 – Hudson Valley Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,864	124.0	2010	579	25.1
2015	2,978	127.0	2015	605	25.8
2020	3,116	131.1	2020	633	26.6
2025	3,263	135.8	2025	661	27.5
2030	3,379	139.9	2030	685	28.4
Percent change 2006-2030	21.2%	14.5%	Percent change 2006-2030	22.8%	16.0%
Annualized change 2006-2030	0.81%	0.57%	Annualized change 2006-2030	0.86%	0.62%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,608	69.6	2010	677	29.3
2015	1,693	72.2	2015	681	29.0
2020	1,781	74.9	2020	702	29.5
2025	1,879	78.2	2025	723	30.1
2030	1,957	81.0	2030	737	30.5
Percent change 2006-2030	27.1%	20.1%	Percent change 2006-2030	6.9%	1.0%
Annualized change 2006-2030	1.00%	0.77%	Annualized change 2006-2030	0.28%	0.04%

Non-Primary Care Specialties

Figure 56 – Hudson Valley Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	224	9.8
2010	239	10.4
2015	260	11.1
2020	281	11.8
2025	306	12.8
2030	327	13.5
Percent change 2006-2030	46.0%	37.9%
Annualized change 2006-2030	1.59%	1.35%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	886	38.8
2010	940	40.7
2015	1,010	43.1
2020	1,080	45.5
2025	1,157	48.2
2030	1,220	50.5
Percent change 2006-2030	37.7%	30.1%
Annualized change 2006-2030	1.34%	1.10%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	404	17.7
2010	414	17.9
2015	423	18.0
2020	432	18.2
2025	437	18.2
2030	443	18.4
Percent change 2006-2030	9.8%	3.7%
Annualized change 2006-2030	0.39%	0.15%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	170	7.5
2010	180	7.8
2015	192	8.2
2020	204	8.6
2025	215	8.9
2030	225	9.3
Percent change 2006-2030	32.6%	25.2%
Annualized change 2006-2030	1.18%	0.94%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	837	36.7
2010	875	37.9
2015	920	39.2
2020	964	40.6
2025	1,007	41.9
2030	1,049	43.4
Percent change 2006-2030	25.3%	18.3%
Annualized change 2006-2030	0.94%	0.70%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	421	18.4
2010	443	19.2
2015	475	20.3
2020	510	21.5
2025	548	22.8
2030	582	24.1
Percent change 2006-2030	38.1%	30.5%
Annualized change 2006-2030	1.35%	1.11%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	363	15.9
2010	382	16.5
2015	408	17.4
2020	438	18.4
2025	471	19.6
2030	501	20.7
Percent change 2006-2030	38.0%	30.4%
Annualized change 2006-2030	1.35%	1.11%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	241	10.6
2010	247	10.7
2015	254	10.8
2020	262	11.0
2025	269	11.2
2030	275	11.4
Percent change 2006-2030	14.1%	7.7%
Annualized change 2006-2030	0.55%	0.31%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	268	11.7
2010	283	12.3
2015	304	13.0
2020	324	13.6
2025	346	14.4
2030	364	15.1
Percent change 2006-2030	35.9%	28.4%
Annualized change 2006-2030	1.29%	1.05%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	247	10.8
2010	262	11.3
2015	282	12.0
2020	304	12.8
2025	330	13.7
2030	351	14.6
Percent change 2006-2030	42.3%	34.4%
Annualized change 2006-2030	1.48%	1.24%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	4.5
2010	108	4.7
2015	113	4.8
2020	120	5.1
2025	127	5.3
2030	132	5.5
Percent change 2006-2030	28.1%	21.0%
Annualized change 2006-2030	1.04%	0.80%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	198	8.7
2010	208	9.0
2015	223	9.5
2020	239	10.0
2025	256	10.6
2030	271	11.2
Percent change 2006-2030	36.8%	29.3%
Annualized change 2006-2030	1.31%	1.07%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	4.5
2010	109	4.7
2015	118	5.0
2020	127	5.3
2025	137	5.7
2030	146	6.0
Percent change 2006-2030	41.7%	33.9%
Annualized change 2006-2030	1.46%	1.22%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	142	6.2
2010	151	6.5
2015	162	6.9
2020	173	7.3
2025	185	7.7
2030	195	8.1
Percent change 2006-2030	37.3%	29.7%
Annualized change 2006-2030	1.33%	1.09%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	880	38.6
2010	928	40.2
2015	987	42.1
2020	1,050	44.2
2025	1,116	46.5
2030	1,175	48.6
Percent change 2006-2030	33.5%	26.1%
Annualized change 2006-2030	1.21%	0.97%

Hudson Valley Demand Scenario 3: Universal Health Insurance by 2020

Figure 57 – Hudson Valley Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8,274	362.6
2010	8,575	371.3
2015	8,974	382.8
2020	9,403	395.6
2025	9,687	403.3
2030	9,875	408.8
Percent change 2006-2030	19.4%	12.7%
Annualized change 2006-2030	0.74%	0.50%

Figure 58 – Hudson Valley Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,872	124.3	2010	5,704	246.9
2015	2,997	127.8	2015	5,977	254.9
2020	3,146	132.4	2020	6,257	263.2
2025	3,247	135.2	2025	6,440	268.1
2030	3,313	137.2	2030	6,562	271.7
Percent change 2006-2030	18.9%	12.3%	Percent change 2006-2030	19.6%	13.0%
Annualized change 2006-2030	0.72%	0.48%	Annualized change 2006-2030	0.75%	0.51%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 59 – Hudson Valley Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,872	124.3	2010	577	25.0
2015	2,997	127.8	2015	602	25.7
2020	3,146	132.4	2020	628	26.4
2025	3,247	135.2	2025	646	26.9
2030	3,313	137.2	2030	660	27.3
Percent change 2006-2030	18.9%	12.3%	Percent change 2006-2030	18.2%	11.7%
Annualized change 2006-2030	0.72%	0.48%	Annualized change 2006-2030	0.70%	0.46%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,616	70.0	2010	678	29.4
2015	1,712	73.0	2015	683	29.1
2020	1,814	76.3	2020	705	29.7
2025	1,885	78.5	2025	716	29.8
2030	1,935	80.1	2030	719	29.8
Percent change 2006-2030	25.6%	18.7%	Percent change 2006-2030	4.3%	-1.4%
Annualized change 2006-2030	0.96%	0.72%	Annualized change 2006-2030	0.18%	-0.06%

Non-Primary Care Specialties

Figure 60 – Hudson Valley Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	224	9.8
2010	236	10.2
2015	252	10.7
2020	268	11.3
2025	283	11.8
2030	292	12.1
Percent change 2006-2030	30.4%	23.1%
Annualized change 2006-2030	1.11%	0.87%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	886	38.8
2010	931	40.3
2015	988	42.1
2020	1,044	43.9
2025	1,082	45.0
2030	1,105	45.7
Percent change 2006-2030	24.7%	17.8%
Annualized change 2006-2030	0.92%	0.69%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	404	17.7
2010	415	17.9
2015	425	18.1
2020	434	18.3
2025	433	18.0
2030	433	17.9
Percent change 2006-2030	7.2%	1.2%
Annualized change 2006-2030	0.29%	0.05%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	170	7.5
2010	178	7.7
2015	188	8.0
2020	197	8.3
2025	202	8.4
2030	205	8.5
Percent change 2006-2030	20.4%	13.7%
Annualized change 2006-2030	0.78%	0.54%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	837	36.7
2010	865	37.4
2015	895	38.2
2020	924	38.8
2025	934	38.9
2030	941	39.0
Percent change 2006-2030	12.5%	6.2%
Annualized change 2006-2030	0.49%	0.25%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	421	18.4
2010	439	19.0
2015	464	19.8
2020	491	20.7
2025	512	21.3
2030	525	21.7
Percent change 2006-2030	24.8%	17.9%
Annualized change 2006-2030	0.93%	0.69%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	363	15.9
2010	378	16.4
2015	400	17.1
2020	424	17.8
2025	442	18.4
2030	455	18.8
Percent change 2006-2030	25.3%	18.4%
Annualized change 2006-2030	0.94%	0.71%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	241	10.6
2010	241	10.4
2015	239	10.2
2020	239	10.1
2025	242	10.1
2030	244	10.1
Percent change 2006-2030	1.1%	-4.5%
Annualized change 2006-2030	0.05%	-0.19%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	268	11.7
2010	280	12.1
2015	297	12.7
2020	312	13.1
2025	323	13.4
2030	329	13.6
Percent change 2006-2030	22.7%	15.9%
Annualized change 2006-2030	0.86%	0.62%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	247	10.8
2010	257	11.1
2015	270	11.5
2020	284	11.9
2025	298	12.4
2030	307	12.7
Percent change 2006-2030	24.4%	17.5%
Annualized change 2006-2030	0.91%	0.67%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	4.5
2010	106	4.6
2015	110	4.7
2020	115	4.8
2025	117	4.9
2030	118	4.9
Percent change 2006-2030	14.2%	7.9%
Annualized change 2006-2030	0.56%	0.32%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	198	8.7
2010	207	8.9
2015	219	9.3
2020	232	9.8
2025	240	10.0
2030	247	10.2
Percent change 2006-2030	24.6%	17.7%
Annualized change 2006-2030	0.92%	0.68%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	4.5
2010	108	4.7
2015	115	4.9
2020	122	5.2
2025	128	5.3
2030	132	5.5
Percent change 2006-2030	28.1%	21.0%
Annualized change 2006-2030	1.04%	0.80%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	142	6.2
2010	149	6.5
2015	158	6.7
2020	166	7.0
2025	172	7.2
2030	175	7.3
Percent change 2006-2030	23.5%	16.7%
Annualized change 2006-2030	0.88%	0.64%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	880	38.6
2010	916	39.7
2015	960	40.9
2020	1,005	42.3
2025	1,035	43.1
2030	1,054	43.7
Percent change 2006-2030	19.8%	13.2%
Annualized change 2006-2030	0.76%	0.52%

Hudson Valley Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

Figure 61 – Hudson Valley Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8,274	362.6
2010	8,412	364.2
2015	8,593	366.5
2020	8,790	369.8
2025	8,991	374.3
2030	9,102	376.8
Percent change 2006-2030	10.0%	3.9%
Annualized change 2006-2030	0.40%	0.16%

Figure 62 – Hudson Valley Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,787	122.1	2006	5,487	240.5
2010	2,830	122.5	2010	5,582	241.7
2015	2,900	123.7	2015	5,693	242.8
2020	2,989	125.7	2020	5,801	244.0
2025	3,084	128.4	2025	5,907	245.9
2030	3,147	130.3	2030	5,955	246.5
Percent change 2006-2030	12.9%	6.7%	Percent change 2006-2030	8.5%	2.5%
Annualized change 2006-2030	0.51%	0.27%	Annualized change 2006-2030	0.34%	0.10%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 63 – Hudson Valley Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,787	122.1	2006	558	24.5
2010	2,830	122.5	2010	572	24.8
2015	2,900	123.7	2015	589	25.1
2020	2,989	125.7	2020	607	25.5
2025	3,084	128.4	2025	625	26.0
2030	3,147	130.3	2030	638	26.4
Percent change 2006-2030	12.9%	6.7%	Percent change 2006-2030	14.3%	8.0%
Annualized change 2006-2030	0.51%	0.27%	Annualized change 2006-2030	0.56%	0.32%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,540	67.5	2006	689	30.2
2010	1,589	68.8	2010	669	29.0
2015	1,648	70.3	2015	663	28.3
2020	1,709	71.9	2020	673	28.3
2025	1,776	73.9	2025	683	28.4
2030	1,823	75.5	2030	686	28.4
Percent change 2006-2030	18.4%	11.8%	Percent change 2006-2030	-0.4%	-5.9%
Annualized change 2006-2030	0.71%	0.47%	Annualized change 2006-2030	-0.02%	-0.26%

Non-Primary Care Specialties

Figure 64 – Hudson Valley Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	224	9.8
2010	231	10.0
2015	240	10.3
2020	249	10.5
2025	260	10.8
2030	266	11.0
Percent change 2006-2030	18.8%	12.2%
Annualized change 2006-2030	0.72%	0.48%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	886	38.8
2010	908	39.3
2015	935	39.9
2020	958	40.3
2025	982	40.9
2030	993	41.1
Percent change 2006-2030	12.0%	5.8%
Annualized change 2006-2030	0.48%	0.24%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	404	17.7
2010	406	17.6
2015	404	17.2
2020	402	16.9
2025	397	16.5
2030	392	16.2
Percent change 2006-2030	-2.9%	-8.3%
Annualized change 2006-2030	-0.12%	-0.36%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	170	7.5
2010	174	7.5
2015	178	7.6
2020	181	7.6
2025	182	7.6
2030	183	7.6
Percent change 2006-2030	7.9%	1.9%
Annualized change 2006-2030	0.32%	0.08%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	837	36.7
2010	846	36.6
2015	851	36.3
2020	855	36.0
2025	856	35.6
2030	853	35.3
Percent change 2006-2030	1.9%	-3.7%
Annualized change 2006-2030	0.08%	-0.16%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	421	18.4
2010	428	18.5
2015	439	18.7
2020	452	19.0
2025	466	19.4
2030	473	19.6
Percent change 2006-2030	12.4%	6.2%
Annualized change 2006-2030	0.49%	0.25%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	363	15.9
2010	369	16.0
2015	378	16.1
2020	388	16.3
2025	400	16.7
2030	408	16.9
Percent change 2006-2030	12.3%	6.1%
Annualized change 2006-2030	0.48%	0.25%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	241	10.6
2010	242	10.5
2015	242	10.3
2020	244	10.2
2025	244	10.2
2030	243	10.1
Percent change 2006-2030	0.9%	-4.7%
Annualized change 2006-2030	0.04%	-0.20%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	268	11.7
2010	274	11.8
2015	282	12.0
2020	287	12.1
2025	294	12.2
2030	296	12.3
Percent change 2006-2030	10.6%	4.5%
Annualized change 2006-2030	0.42%	0.18%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	247	10.8
2010	253	10.9
2015	261	11.1
2020	270	11.4
2025	280	11.7
2030	286	11.8
Percent change 2006-2030	15.8%	9.4%
Annualized change 2006-2030	0.61%	0.37%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	4.5
2010	104	4.5
2015	105	4.5
2020	107	4.5
2025	108	4.5
2030	107	4.4
Percent change 2006-2030	4.2%	-1.5%
Annualized change 2006-2030	0.17%	-0.06%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	198	8.7
2010	201	8.7
2015	206	8.8
2020	212	8.9
2025	217	9.0
2030	220	9.1
Percent change 2006-2030	11.3%	5.2%
Annualized change 2006-2030	0.45%	0.21%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	103	4.5
2010	105	4.6
2015	109	4.6
2020	113	4.7
2025	116	4.8
2030	119	4.9
Percent change 2006-2030	15.3%	8.9%
Annualized change 2006-2030	0.59%	0.36%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	142	6.2
2010	146	6.3
2015	150	6.4
2020	153	6.5
2025	157	6.6
2030	159	6.6
Percent change 2006-2030	11.7%	5.5%
Annualized change 2006-2030	0.46%	0.23%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	880	38.6
2010	896	38.8
2015	913	39.0
2020	931	39.2
2025	948	39.5
2030	956	39.6
Percent change 2006-2030	8.6%	2.6%
Annualized change 2006-2030	0.34%	0.11%

Long Island Physician Demand Forecasts, 2006 – 2030
Long Island Demand Scenario 1: Baseline
Figure 65 – Long Island Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	11,122	392.8
2010	11,249	397.3
2015	11,449	404.4
2020	11,679	412.6
2025	11,921	422.9
2030	12,018	430.8
Percent change 2006-2030	8.1%	9.7%
Annualized change 2006-2030	0.32%	0.39%

Figure 66 – Long Island Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,444	121.6	2010	7,805	275.7
2015	3,470	122.6	2015	7,979	281.8
2020	3,529	124.7	2020	8,150	287.9
2025	3,600	127.7	2025	8,321	295.2
2030	3,627	130.0	2030	8,391	300.8
Percent change 2006-2030	5.3%	6.9%	Percent change 2006-2030	9.3%	10.9%
Annualized change 2006-2030	0.22%	0.28%	Annualized change 2006-2030	0.37%	0.43%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 67 – Long Island Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,444	121.6	2010	820	29.0
2015	3,470	122.6	2015	833	29.4
2020	3,529	124.7	2020	847	29.9
2025	3,600	127.7	2025	860	30.5
2030	3,627	130.0	2030	865	31.0
Percent change 2006-2030	5.3%	6.9%	Percent change 2006-2030	6.8%	8.4%
Annualized change 2006-2030	0.22%	0.28%	Annualized change 2006-2030	0.27%	0.34%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,746	61.7	2010	878	31.0
2015	1,790	63.2	2015	847	29.9
2020	1,837	64.9	2020	845	29.9
2025	1,888	67.0	2025	852	30.2
2030	1,915	68.7	2030	847	30.4
Percent change 2006-2030	12.0%	13.7%	Percent change 2006-2030	-8.2%	-6.9%
Annualized change 2006-2030	0.47%	0.54%	Annualized change 2006-2030	-0.36%	-0.30%

Non-Primary Care Specialties

Figure 68 – Long Island Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	468	16.5
2010	481	17.0
2015	501	17.7
2020	522	18.4
2025	545	19.3
2030	558	20.0
Percent change 2006-2030	19.2%	21.0%
Annualized change 2006-2030	0.74%	0.80%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,476	52.1
2010	1,511	53.4
2015	1,557	55.0
2020	1,600	56.5
2025	1,642	58.3
2030	1,660	59.5
Percent change 2006-2030	12.5%	14.2%
Annualized change 2006-2030	0.49%	0.55%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	564	19.9
2010	566	20.0
2015	567	20.0
2020	562	19.9
2025	553	19.6
2030	543	19.5
Percent change 2006-2030	-3.7%	-2.3%
Annualized change 2006-2030	-0.16%	-0.10%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	258	9.1
2010	263	9.3
2015	269	9.5
2020	274	9.7
2025	278	9.9
2030	279	10.0
Percent change 2006-2030	8.1%	9.8%
Annualized change 2006-2030	0.33%	0.39%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	655	23.1
2010	661	23.3
2015	666	23.5
2020	668	23.6
2025	668	23.7
2030	663	23.8
Percent change 2006-2030	1.2%	2.7%
Annualized change 2006-2030	0.05%	0.11%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	682	24.1
2010	693	24.5
2015	711	25.1
2020	732	25.9
2025	756	26.8
2030	768	27.5
Percent change 2006-2030	12.6%	14.3%
Annualized change 2006-2030	0.50%	0.56%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	587	20.7
2010	595	21.0
2015	609	21.5
2020	627	22.2
2025	648	23.0
2030	660	23.7
Percent change 2006-2030	12.4%	14.1%
Annualized change 2006-2030	0.49%	0.55%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	396	14.0
2010	396	14.0
2015	396	14.0
2020	398	14.1
2025	398	14.1
2030	396	14.2
Percent change 2006-2030	0.0%	1.5%
Annualized change 2006-2030	0.00%	0.06%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	13.1
2010	378	13.4
2015	389	13.7
2020	398	14.1
2025	406	14.4
2030	410	14.7
Percent change 2006-2030	10.5%	12.2%
Annualized change 2006-2030	0.42%	0.48%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	295	10.4
2010	301	10.6
2015	311	11.0
2020	322	11.4
2025	335	11.9
2030	342	12.3
Percent change 2006-2030	15.9%	17.7%
Annualized change 2006-2030	0.62%	0.68%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	113	4.0
2010	114	4.0
2015	115	4.1
2020	116	4.1
2025	118	4.2
2030	118	4.2
Percent change 2006-2030	4.4%	6.0%
Annualized change 2006-2030	0.18%	0.24%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	305	10.8
2010	310	10.9
2015	317	11.2
2020	325	11.5
2025	334	11.8
2030	339	12.2
Percent change 2006-2030	11.1%	12.8%
Annualized change 2006-2030	0.44%	0.50%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	165	5.8
2010	168	5.9
2015	174	6.1
2020	180	6.4
2025	186	6.6
2030	190	6.8
Percent change 2006-2030	15.2%	16.9%
Annualized change 2006-2030	0.59%	0.65%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	211	7.5
2010	216	7.6
2015	222	7.8
2020	228	8.1
2025	233	8.3
2030	235	8.4
Percent change 2006-2030	11.4%	13.0%
Annualized change 2006-2030	0.45%	0.51%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,133	40.0
2010	1,152	40.7
2015	1,175	41.5
2020	1,198	42.3
2025	1,221	43.3
2030	1,230	44.1
Percent change 2006-2030	8.6%	10.2%
Annualized change 2006-2030	0.34%	0.41%

Long Island Demand Scenario 2: Growing Economy

Figure 69 – Long Island Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	11,122	392.8
2010	11,481	405.5
2015	11,989	423.4
2020	12,550	443.4
2025	13,147	466.4
2030	13,605	487.7
Percent change 2006-2030	22.3%	24.2%
Annualized change 2006-2030	0.84%	0.91%

Figure 70 – Long Island Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,485	123.1	2010	7,996	282.4
2015	3,564	125.9	2015	8,425	297.6
2020	3,679	130.0	2020	8,871	313.4
2025	3,809	135.1	2025	9,339	331.3
2030	3,895	139.6	2030	9,710	348.1
Percent change 2006-2030	13.1%	14.8%	Percent change 2006-2030	26.4%	28.3%
Annualized change 2006-2030	0.51%	0.58%	Annualized change 2006-2030	0.98%	1.05%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 71 – Long Island Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,485	123.1	2010	830	29.3
2015	3,564	125.9	2015	856	30.2
2020	3,679	130.0	2020	883	31.2
2025	3,809	135.1	2025	910	32.3
2030	3,895	139.6	2030	929	33.3
Percent change 2006-2030	13.1%	14.8%	Percent change 2006-2030	14.7%	16.4%
Annualized change 2006-2030	0.51%	0.58%	Annualized change 2006-2030	0.57%	0.63%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,767	62.4	2010	888	31.4
2015	1,838	64.9	2015	870	30.7
2020	1,915	67.6	2020	881	31.1
2025	1,997	70.9	2025	901	32.0
2030	2,056	73.7	2030	909	32.6
Percent change 2006-2030	20.2%	22.1%	Percent change 2006-2030	-1.5%	0.0%
Annualized change 2006-2030	0.77%	0.83%	Annualized change 2006-2030	-0.06%	0.00%

Non-Primary Care Specialties

Figure 72 – Long Island Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	468	16.5
2010	494	17.4
2015	531	18.8
2020	571	20.2
2025	616	21.9
2030	652	23.4
Percent change 2006-2030	39.2%	41.3%
Annualized change 2006-2030	1.39%	1.45%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,476	52.1
2010	1,551	54.8
2015	1,650	58.3
2020	1,751	61.9
2025	1,856	65.9
2030	1,938	69.5
Percent change 2006-2030	31.3%	33.3%
Annualized change 2006-2030	1.14%	1.20%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	564	19.9
2010	573	20.2
2015	582	20.6
2020	586	20.7
2025	585	20.8
2030	583	20.9
Percent change 2006-2030	3.4%	4.9%
Annualized change 2006-2030	0.14%	0.20%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	258	9.1
2010	270	9.5
2015	285	10.1
2020	300	10.6
2025	314	11.2
2030	326	11.7
Percent change 2006-2030	26.3%	28.2%
Annualized change 2006-2030	0.98%	1.04%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	655	23.1
2010	678	24.0
2015	706	24.9
2020	731	25.8
2025	755	26.8
2030	774	27.8
Percent change 2006-2030	18.2%	20.0%
Annualized change 2006-2030	0.70%	0.76%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	682	24.1
2010	711	25.1
2015	754	26.6
2020	801	28.3
2025	855	30.3
2030	897	32.2
Percent change 2006-2030	31.5%	33.5%
Annualized change 2006-2030	1.15%	1.21%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	587	20.7
2010	611	21.6
2015	645	22.8
2020	686	24.2
2025	733	26.0
2030	771	27.6
Percent change 2006-2030	31.3%	33.3%
Annualized change 2006-2030	1.14%	1.20%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	396	14.0
2010	401	14.2
2015	407	14.4
2020	415	14.7
2025	421	14.9
2030	425	15.2
Percent change 2006-2030	7.4%	9.0%
Annualized change 2006-2030	0.30%	0.36%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	13.1
2010	388	13.7
2015	412	14.6
2020	436	15.4
2025	459	16.3
2030	479	17.2
Percent change 2006-2030	29.0%	31.0%
Annualized change 2006-2030	1.07%	1.13%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	295	10.4
2010	309	10.9
2015	330	11.6
2020	352	12.5
2025	379	13.4
2030	399	14.3
Percent change 2006-2030	35.4%	37.4%
Annualized change 2006-2030	1.27%	1.33%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	113	4.0
2010	117	4.1
2015	122	4.3
2020	127	4.5
2025	133	4.7
2030	138	4.9
Percent change 2006-2030	21.9%	23.8%
Annualized change 2006-2030	0.83%	0.89%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	305	10.8
2010	318	11.2
2015	336	11.9
2020	356	12.6
2025	378	13.4
2030	396	14.2
Percent change 2006-2030	29.8%	31.7%
Annualized change 2006-2030	1.09%	1.16%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	165	5.8
2010	172	6.1
2015	184	6.5
2020	197	7.0
2025	210	7.5
2030	222	8.0
Percent change 2006-2030	34.5%	36.5%
Annualized change 2006-2030	1.24%	1.30%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	211	7.5
2010	222	7.8
2015	235	8.3
2020	250	8.8
2025	263	9.3
2030	274	9.8
Percent change 2006-2030	30.1%	32.0%
Annualized change 2006-2030	1.10%	1.16%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,133	40.0
2010	1,182	41.8
2015	1,245	44.0
2020	1,311	46.3
2025	1,380	49.0
2030	1,436	51.5
Percent change 2006-2030	26.8%	28.7%
Annualized change 2006-2030	0.99%	1.06%

Long Island Demand Scenario 3: Universal Health Insurance by 2020

Figure 73 – Long Island Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	11,122	392.8
2010	11,400	402.7
2015	11,800	416.8
2020	12,242	432.5
2025	12,497	443.3
2030	12,600	451.7
Percent change 2006-2030	13.3%	15.0%
Annualized change 2006-2030	0.52%	0.58%

Figure 74 – Long Island Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,494	123.4	2010	7,907	279.3
2015	3,584	126.6	2015	8,216	290.2
2020	3,711	131.1	2020	8,532	301.4
2025	3,786	134.3	2025	8,712	309.0
2030	3,814	136.7	2030	8,785	315.0
Percent change 2006-2030	10.8%	12.4%	Percent change 2006-2030	14.4%	16.1%
Annualized change 2006-2030	0.43%	0.49%	Annualized change 2006-2030	0.56%	0.62%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 75 – Long Island Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,494	123.4	2010	828	29.2
2015	3,584	126.6	2015	851	30.1
2020	3,711	131.1	2020	876	30.9
2025	3,786	134.3	2025	889	31.5
2030	3,814	136.7	2030	894	32.1
Percent change 2006-2030	10.8%	12.4%	Percent change 2006-2030	10.4%	12.1%
Annualized change 2006-2030	0.43%	0.49%	Annualized change 2006-2030	0.41%	0.48%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,776	62.7	2010	890	31.4
2015	1,860	65.7	2015	873	30.8
2020	1,950	68.9	2020	885	31.3
2025	2,004	71.1	2025	893	31.7
2030	2,032	72.9	2030	888	31.8
Percent change 2006-2030	18.9%	20.6%	Percent change 2006-2030	-3.8%	-2.4%
Annualized change 2006-2030	0.72%	0.78%	Annualized change 2006-2030	-0.16%	-0.10%

Non-Primary Care Specialties

Figure 76 – Long Island Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	468	16.5
2010	487	17.2
2015	515	18.2
2020	544	19.2
2025	568	20.2
2030	582	20.9
Percent change 2006-2030	24.3%	26.2%
Annualized change 2006-2030	0.91%	0.97%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,476	52.1
2010	1,535	54.2
2015	1,614	57.0
2020	1,692	59.8
2025	1,736	61.6
2030	1,755	62.9
Percent change 2006-2030	18.9%	20.7%
Annualized change 2006-2030	0.72%	0.79%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	564	19.9
2010	574	20.3
2015	584	20.6
2020	589	20.8
2025	580	20.6
2030	569	20.4
Percent change 2006-2030	0.9%	2.4%
Annualized change 2006-2030	0.04%	0.10%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	258	9.1
2010	267	9.4
2015	279	9.9
2020	291	10.3
2025	295	10.5
2030	296	10.6
Percent change 2006-2030	14.7%	16.4%
Annualized change 2006-2030	0.57%	0.64%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	655	23.1
2010	670	23.7
2015	686	24.2
2020	700	24.7
2025	700	24.8
2030	695	24.9
Percent change 2006-2030	6.1%	7.7%
Annualized change 2006-2030	0.25%	0.31%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	682	24.1
2010	704	24.9
2015	736	26.0
2020	772	27.3
2025	797	28.3
2030	810	29.0
Percent change 2006-2030	18.8%	20.5%
Annualized change 2006-2030	0.72%	0.78%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	587	20.7
2010	605	21.4
2015	632	22.3
2020	665	23.5
2025	687	24.4
2030	700	25.1
Percent change 2006-2030	19.2%	21.0%
Annualized change 2006-2030	0.74%	0.80%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	396	14.0
2010	390	13.8
2015	384	13.6
2020	379	13.4
2025	379	13.4
2030	377	13.5
Percent change 2006-2030	-4.8%	-3.4%
Annualized change 2006-2030	-0.20%	-0.14%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	13.1
2010	384	13.6
2015	402	14.2
2020	420	14.8
2025	428	15.2
2030	432	15.5
Percent change 2006-2030	16.5%	18.2%
Annualized change 2006-2030	0.64%	0.70%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	295	10.4
2010	303	10.7
2015	315	11.1
2020	329	11.6
2025	342	12.1
2030	349	12.5
Percent change 2006-2030	18.3%	20.1%
Annualized change 2006-2030	0.70%	0.77%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	113	4.0
2010	115	4.1
2015	118	4.2
2020	121	4.3
2025	123	4.4
2030	123	4.4
Percent change 2006-2030	8.7%	10.3%
Annualized change 2006-2030	0.35%	0.41%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	305	10.8
2010	316	11.1
2015	330	11.6
2020	346	12.2
2025	355	12.6
2030	361	12.9
Percent change 2006-2030	18.2%	20.0%
Annualized change 2006-2030	0.70%	0.76%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	165	5.8
2010	171	6.0
2015	180	6.4
2020	190	6.7
2025	196	7.0
2030	201	7.2
Percent change 2006-2030	21.5%	23.4%
Annualized change 2006-2030	0.82%	0.88%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	211	7.5
2010	219	7.7
2015	229	8.1
2020	239	8.5
2025	245	8.7
2030	247	8.8
Percent change 2006-2030	16.9%	18.7%
Annualized change 2006-2030	0.65%	0.72%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,133	40.0
2010	1,168	41.2
2015	1,211	42.8
2020	1,256	44.4
2025	1,280	45.4
2030	1,289	46.2
Percent change 2006-2030	13.8%	15.5%
Annualized change 2006-2030	0.54%	0.60%

Long Island Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

Figure 77 – Long Island Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	11,122	392.8
2010	11,183	395.0
2015	11,297	399.0
2020	11,439	404.1
2025	11,590	411.2
2030	11,598	415.8
Percent change 2006-2030	4.3%	5.8%
Annualized change 2006-2030	0.17%	0.24%

Figure 78 – Long Island Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,443	121.6	2006	7,679	271.2
2010	3,444	121.6	2010	7,739	273.3
2015	3,470	122.6	2015	7,827	276.4
2020	3,529	124.7	2020	7,910	279.4
2025	3,600	127.7	2025	7,990	283.4
2030	3,627	130.0	2030	7,971	285.8
Percent change 2006-2030	5.3%	6.9%	Percent change 2006-2030	3.8%	5.4%
Annualized change 2006-2030	0.22%	0.28%	Annualized change 2006-2030	0.16%	0.22%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 79 – Long Island Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,443	121.6	2006	810	28.6
2010	3,444	121.6	2010	820	29.0
2015	3,470	122.6	2015	833	29.4
2020	3,529	124.7	2020	847	29.9
2025	3,600	127.7	2025	860	30.5
2030	3,627	130.0	2030	865	31.0
Percent change 2006-2030	5.3%	6.9%	Percent change 2006-2030	6.8%	8.4%
Annualized change 2006-2030	0.22%	0.28%	Annualized change 2006-2030	0.27%	0.34%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,710	60.4	2006	923	32.6
2010	1,746	61.7	2010	878	31.0
2015	1,790	63.2	2015	847	29.9
2020	1,837	64.9	2020	845	29.9
2025	1,888	67.0	2025	852	30.2
2030	1,915	68.7	2030	847	30.4
Percent change 2006-2030	12.0%	13.7%	Percent change 2006-2030	-8.2%	-6.9%
Annualized change 2006-2030	0.47%	0.54%	Annualized change 2006-2030	-0.36%	-0.30%

Non-Primary Care Specialties

Figure 80 – Long Island Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	468	16.5
2010	477	16.8
2015	491	17.4
2020	507	17.9
2025	523	18.6
2030	530	19.0
Percent change 2006-2030	13.3%	15.0%
Annualized change 2006-2030	0.52%	0.58%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,476	52.1
2010	1,498	52.9
2015	1,527	53.9
2020	1,553	54.9
2025	1,577	55.9
2030	1,577	56.5
Percent change 2006-2030	6.8%	8.4%
Annualized change 2006-2030	0.28%	0.34%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	564	19.9
2010	561	19.8
2015	556	19.6
2020	545	19.3
2025	531	18.8
2030	516	18.5
Percent change 2006-2030	-8.5%	-7.2%
Annualized change 2006-2030	-0.37%	-0.31%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	258	9.1
2010	261	9.2
2015	264	9.3
2020	266	9.4
2025	267	9.5
2030	265	9.5
Percent change 2006-2030	2.7%	4.3%
Annualized change 2006-2030	0.11%	0.17%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	655	23.1
2010	655	23.1
2015	653	23.1
2020	648	22.9
2025	641	22.8
2030	630	22.6
Percent change 2006-2030	-3.8%	-2.4%
Annualized change 2006-2030	-0.16%	-0.10%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	682	24.1
2010	687	24.3
2015	697	24.6
2020	710	25.1
2025	726	25.8
2030	730	26.2
Percent change 2006-2030	7.0%	8.6%
Annualized change 2006-2030	0.28%	0.34%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	587	20.7
2010	590	20.8
2015	597	21.1
2020	609	21.5
2025	622	22.1
2030	627	22.5
Percent change 2006-2030	6.8%	8.4%
Annualized change 2006-2030	0.28%	0.34%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	396	14.0
2010	393	13.9
2015	388	13.7
2020	386	13.6
2025	382	13.6
2030	376	13.5
Percent change 2006-2030	-5.0%	-3.6%
Annualized change 2006-2030	-0.21%	-0.15%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	13.1
2010	375	13.2
2015	382	13.5
2020	386	13.6
2025	390	13.8
2030	390	14.0
Percent change 2006-2030	5.0%	6.6%
Annualized change 2006-2030	0.20%	0.27%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	295	10.4
2010	298	10.5
2015	305	10.8
2020	313	11.0
2025	322	11.4
2030	325	11.6
Percent change 2006-2030	10.1%	11.8%
Annualized change 2006-2030	0.40%	0.47%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	113	4.0
2010	113	4.0
2015	113	4.0
2020	113	4.0
2025	113	4.0
2030	112	4.0
Percent change 2006-2030	-0.8%	0.7%
Annualized change 2006-2030	-0.03%	0.03%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	305	10.8
2010	307	10.9
2015	311	11.0
2020	315	11.1
2025	321	11.4
2030	322	11.5
Percent change 2006-2030	5.6%	7.2%
Annualized change 2006-2030	0.23%	0.29%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	165	5.8
2010	167	5.9
2015	171	6.0
2020	175	6.2
2025	179	6.3
2030	181	6.5
Percent change 2006-2030	9.4%	11.0%
Annualized change 2006-2030	0.37%	0.44%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	211	7.5
2010	214	7.6
2015	218	7.7
2020	221	7.8
2025	224	7.9
2030	223	8.0
Percent change 2006-2030	5.8%	7.4%
Annualized change 2006-2030	0.24%	0.30%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,133	40.0
2010	1,142	40.3
2015	1,153	40.7
2020	1,163	41.1
2025	1,172	41.6
2030	1,169	41.9
Percent change 2006-2030	3.1%	4.7%
Annualized change 2006-2030	0.13%	0.19%

Mohawk Valley Physician Demand Forecasts, 2006 – 2030

Mohawk Valley Demand Scenario 1: Baseline

Figure 81 – Mohawk Valley Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	871	171.7
2010	868	172.8
2015	870	175.4
2020	879	179.8
2025	883	184.0
2030	881	187.9
Percent change 2006-2030	1.1%	9.4%
Annualized change 2006-2030	0.05%	0.38%

Figure 82 – Mohawk Valley Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	368	73.3	2010	500	99.5
2015	369	74.4	2015	501	101.0
2020	371	75.9	2020	508	103.9
2025	373	77.7	2025	510	106.3
2030	371	79.1	2030	510	108.8
Percent change 2006-2030	0.0%	8.2%	Percent change 2006-2030	2.0%	10.3%
Annualized change 2006-2030	0.00%	0.33%	Annualized change 2006-2030	0.08%	0.41%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 83 – Mohawk Valley Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	368	73.3	2010	197	39.2
2015	369	74.4	2015	197	39.7
2020	371	75.9	2020	198	40.5
2025	373	77.7	2025	199	41.5
2030	371	79.1	2030	197	42.0
Percent change 2006-2030	0.0%	8.2%	Percent change 2006-2030	-0.5%	7.6%
Annualized change 2006-2030	0.00%	0.33%	Annualized change 2006-2030	-0.02%	0.31%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	126	25.1	2010	45	9.0
2015	127	25.6	2015	45	9.1
2020	129	26.4	2020	44	9.0
2025	131	27.3	2025	43	9.0
2030	132	28.2	2030	42	9.0
Percent change 2006-2030	4.8%	13.3%	Percent change 2006-2030	-10.6%	-3.3%
Annualized change 2006-2030	0.19%	0.52%	Annualized change 2006-2030	-0.47%	-0.14%

Non-Primary Care Specialties

Figure 84 – Mohawk Valley Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	25	4.9
2010	25	5.0
2015	26	5.2
2020	27	5.5
2025	28	5.8
2030	28	6.0
Percent change 2006-2030	12.0%	21.1%
Annualized change 2006-2030	0.47%	0.80%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	53	10.4
2010	53	10.6
2015	54	10.9
2020	55	11.3
2025	56	11.7
2030	56	11.9
Percent change 2006-2030	5.7%	14.3%
Annualized change 2006-2030	0.23%	0.56%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	37	7.3
2010	37	7.4
2015	36	7.3
2020	35	7.2
2025	34	7.1
2030	33	7.0
Percent change 2006-2030	-10.8%	-3.5%
Annualized change 2006-2030	-0.48%	-0.15%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	21	4.1
2010	21	4.2
2015	21	4.2
2020	21	4.3
2025	21	4.4
2030	21	4.5
Percent change 2006-2030	0.0%	8.2%
Annualized change 2006-2030	0.00%	0.33%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	12.4
2010	63	12.5
2015	62	12.5
2020	62	12.7
2025	61	12.7
2030	60	12.8
Percent change 2006-2030	-4.8%	3.0%
Annualized change 2006-2030	-0.20%	0.12%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	9.3
2010	47	9.4
2015	48	9.7
2020	49	10.0
2025	50	10.4
2030	50	10.7
Percent change 2006-2030	6.4%	15.1%
Annualized change 2006-2030	0.26%	0.59%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	9.3
2010	47	9.4
2015	47	9.5
2020	48	9.8
2025	49	10.2
2030	50	10.7
Percent change 2006-2030	6.4%	15.1%
Annualized change 2006-2030	0.26%	0.59%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	32	6.3
2010	32	6.4
2015	31	6.2
2020	31	6.3
2025	31	6.5
2030	31	6.6
Percent change 2006-2030	-3.1%	4.8%
Annualized change 2006-2030	-0.13%	0.19%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	31	6.1
2010	31	6.2
2015	32	6.4
2020	32	6.5
2025	32	6.7
2030	32	6.8
Percent change 2006-2030	3.2%	11.7%
Annualized change 2006-2030	0.13%	0.46%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	19	3.7
2010	19	3.8
2015	19	3.8
2020	20	4.1
2025	20	4.2
2030	21	4.5
Percent change 2006-2030	10.5%	19.5%
Annualized change 2006-2030	0.42%	0.75%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.7
2030	8	1.7
Percent change 2006-2030	0.0%	8.2%
Annualized change 2006-2030	0.00%	0.33%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	33	6.5
2010	33	6.6
2015	33	6.7
2020	34	7.0
2025	34	7.1
2030	34	7.3
Percent change 2006-2030	3.0%	11.4%
Annualized change 2006-2030	0.12%	0.45%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	13	2.6
2010	13	2.6
2015	13	2.6
2020	14	2.9
2025	14	2.9
2030	14	3.0
Percent change 2006-2030	7.7%	16.5%
Annualized change 2006-2030	0.31%	0.64%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.7
2030	8	1.7
Percent change 2006-2030	0.0%	8.2%
Annualized change 2006-2030	0.00%	0.33%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	12.4
2010	63	12.5
2015	63	12.7
2020	64	13.1
2025	64	13.3
2030	64	13.6
Percent change 2006-2030	1.6%	9.9%
Annualized change 2006-2030	0.07%	0.39%

Mohawk Valley Demand Scenario 2: Growing Economy

Figure 85 – Mohawk Valley Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	871	171.7
2010	884	176.1
2015	908	183.0
2020	939	192.2
2025	966	201.4
2030	988	210.7
Percent change 2006-2030	13.4%	22.7%
Annualized change 2006-2030	0.53%	0.86%

Figure 86 – Mohawk Valley Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	372	74.1	2010	512	101.9
2015	379	76.4	2015	529	106.6
2020	387	79.1	2020	553	113.1
2025	395	82.2	2025	572	119.2
2030	398	85.0	2030	590	125.7
Percent change 2006-2030	7.4%	16.1%	Percent change 2006-2030	17.9%	27.5%
Annualized change 2006-2030	0.30%	0.63%	Annualized change 2006-2030	0.69%	1.02%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 87 – Mohawk Valley Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	372	74.1	2010	199	39.7
2015	379	76.4	2015	202	40.8
2020	387	79.1	2020	206	42.2
2025	395	82.2	2025	211	43.9
2030	398	85.0	2030	212	45.1
Percent change 2006-2030	7.4%	16.1%	Percent change 2006-2030	6.8%	15.6%
Annualized change 2006-2030	0.30%	0.63%	Annualized change 2006-2030	0.28%	0.60%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	128	25.4	2010	46	9.1
2015	130	26.3	2015	46	9.3
2020	134	27.5	2020	46	9.4
2025	139	28.9	2025	45	9.5
2030	142	30.2	2030	45	9.6
Percent change 2006-2030	12.5%	21.7%	Percent change 2006-2030	-4.0%	3.8%
Annualized change 2006-2030	0.49%	0.82%	Annualized change 2006-2030	-0.17%	0.15%

Non-Primary Care Specialties

Figure 88 – Mohawk Valley Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	25	4.9
2010	26	5.1
2015	28	5.6
2020	30	6.0
2025	32	6.6
2030	33	7.0
Percent change 2006-2030	30.8%	41.5%
Annualized change 2006-2030	1.12%	1.46%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	53	10.4
2010	54	10.8
2015	57	11.5
2020	60	12.3
2025	63	13.2
2030	65	13.9
Percent change 2006-2030	23.4%	33.5%
Annualized change 2006-2030	0.88%	1.21%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	37	7.3
2010	37	7.5
2015	37	7.5
2020	36	7.5
2025	36	7.5
2030	35	7.6
Percent change 2006-2030	-4.2%	3.6%
Annualized change 2006-2030	-0.18%	0.15%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	21	4.1
2010	22	4.3
2015	22	4.5
2020	23	4.7
2025	24	4.9
2030	25	5.2
Percent change 2006-2030	16.8%	26.3%
Annualized change 2006-2030	0.65%	0.98%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	12.4
2010	65	12.9
2015	66	13.2
2020	68	13.9
2025	69	14.4
2030	70	14.9
Percent change 2006-2030	11.2%	20.3%
Annualized change 2006-2030	0.44%	0.77%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	9.3
2010	48	9.6
2015	51	10.3
2020	54	11.0
2025	57	11.8
2030	58	12.5
Percent change 2006-2030	24.2%	34.4%
Annualized change 2006-2030	0.91%	1.24%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	9.3
2010	48	9.6
2015	50	10.0
2020	53	10.7
2025	55	11.5
2030	58	12.5
Percent change 2006-2030	24.2%	34.4%
Annualized change 2006-2030	0.91%	1.24%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	32	6.3
2010	32	6.4
2015	32	6.4
2020	32	6.6
2025	33	6.8
2030	33	7.1
Percent change 2006-2030	4.0%	12.5%
Annualized change 2006-2030	0.16%	0.49%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	31	6.1
2010	32	6.3
2015	34	6.8
2020	35	7.2
2025	36	7.5
2030	37	8.0
Percent change 2006-2030	20.5%	30.4%
Annualized change 2006-2030	0.78%	1.11%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	19	3.7
2010	19	3.9
2015	20	4.1
2020	22	4.5
2025	23	4.7
2030	25	5.2
Percent change 2006-2030	29.1%	39.6%
Annualized change 2006-2030	1.07%	1.40%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.7
2020	9	1.8
2025	9	1.9
2030	9	2.0
Percent change 2006-2030	16.8%	26.3%
Annualized change 2006-2030	0.65%	0.98%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	33	6.5
2010	34	6.7
2015	35	7.0
2020	37	7.6
2025	38	8.0
2030	40	8.5
Percent change 2006-2030	20.3%	30.1%
Annualized change 2006-2030	0.77%	1.10%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	13	2.6
2010	13	2.7
2015	14	2.8
2020	15	3.1
2025	16	3.3
2030	16	3.5
Percent change 2006-2030	25.8%	36.0%
Annualized change 2006-2030	0.96%	1.29%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.7
2020	9	1.8
2025	9	1.9
2030	9	2.0
Percent change 2006-2030	16.8%	26.3%
Annualized change 2006-2030	0.65%	0.98%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	12.4
2010	65	12.9
2015	67	13.5
2020	70	14.3
2025	72	15.1
2030	75	15.9
Percent change 2006-2030	18.6%	28.3%
Annualized change 2006-2030	0.71%	1.04%

Mohawk Valley Demand Scenario 3: Universal Health Insurance by 2020

Figure 89 – Mohawk Valley Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	871	171.7
2010	879	175.0
2015	895	180.4
2020	919	188.0
2025	923	192.4
2030	921	196.4
Percent change 2006-2030	5.8%	14.4%
Annualized change 2006-2030	0.23%	0.56%

Figure 90 – Mohawk Valley Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	373	74.2	2010	506	100.8
2015	380	76.5	2015	516	103.9
2020	388	79.3	2020	531	108.7
2025	390	81.2	2025	533	111.1
2030	388	82.7	2030	533	113.7
Percent change 2006-2030	4.5%	13.1%	Percent change 2006-2030	6.7%	15.4%
Annualized change 2006-2030	0.18%	0.51%	Annualized change 2006-2030	0.27%	0.60%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 91 – Mohawk Valley Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	373	74.2	2010	199	39.6
2015	380	76.5	2015	201	40.6
2020	388	79.3	2020	205	41.9
2025	390	81.2	2025	206	42.9
2030	388	82.7	2030	204	43.4
Percent change 2006-2030	4.5%	13.1%	Percent change 2006-2030	2.9%	11.3%
Annualized change 2006-2030	0.18%	0.51%	Annualized change 2006-2030	0.12%	0.45%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	128	25.5	2010	46	9.1
2015	132	26.6	2015	46	9.3
2020	137	28.0	2020	46	9.4
2025	139	29.0	2025	45	9.4
2030	140	29.9	2030	44	9.4
Percent change 2006-2030	11.2%	20.3%	Percent change 2006-2030	-6.4%	1.3%
Annualized change 2006-2030	0.44%	0.77%	Annualized change 2006-2030	-0.27%	0.05%

Non-Primary Care Specialties

Figure 92 – Mohawk Valley Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	25	4.9
2010	25	5.0
2015	27	5.4
2020	28	5.8
2025	29	6.1
2030	29	6.2
Percent change 2006-2030	16.8%	26.3%
Annualized change 2006-2030	0.65%	0.98%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	53	10.4
2010	54	10.7
2015	56	11.3
2020	58	11.9
2025	59	12.3
2030	59	12.6
Percent change 2006-2030	11.7%	20.8%
Annualized change 2006-2030	0.46%	0.79%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	37	7.3
2010	38	7.5
2015	37	7.5
2020	37	7.5
2025	36	7.4
2030	35	7.4
Percent change 2006-2030	-6.5%	1.1%
Annualized change 2006-2030	-0.28%	0.05%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	21	4.1
2010	21	4.3
2015	22	4.4
2020	22	4.6
2025	22	4.6
2030	22	4.7
Percent change 2006-2030	6.1%	14.7%
Annualized change 2006-2030	0.25%	0.57%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	12.4
2010	64	12.7
2015	64	12.9
2020	65	13.3
2025	64	13.3
2030	63	13.4
Percent change 2006-2030	-0.2%	8.0%
Annualized change 2006-2030	-0.01%	0.32%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	9.3
2010	48	9.5
2015	50	10.0
2020	52	10.6
2025	53	11.0
2030	53	11.2
Percent change 2006-2030	12.2%	21.4%
Annualized change 2006-2030	0.48%	0.81%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	9.3
2010	48	9.5
2015	49	9.8
2020	51	10.4
2025	52	10.8
2030	53	11.3
Percent change 2006-2030	12.8%	22.0%
Annualized change 2006-2030	0.50%	0.83%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	32	6.3
2010	32	6.3
2015	30	6.1
2020	30	6.0
2025	30	6.1
2030	30	6.3
Percent change 2006-2030	-7.8%	-0.2%
Annualized change 2006-2030	-0.34%	-0.01%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	31	6.1
2010	31	6.3
2015	33	6.7
2020	34	6.9
2025	34	7.0
2030	34	7.2
Percent change 2006-2030	8.8%	17.7%
Annualized change 2006-2030	0.35%	0.68%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	19	3.7
2010	19	3.8
2015	19	3.9
2020	20	4.2
2025	20	4.3
2030	21	4.6
Percent change 2006-2030	12.8%	22.0%
Annualized change 2006-2030	0.50%	0.83%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.7
2020	8	1.7
2025	8	1.7
2030	8	1.8
Percent change 2006-2030	4.1%	12.6%
Annualized change 2006-2030	0.17%	0.50%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	33	6.5
2010	34	6.7
2015	34	6.9
2020	36	7.4
2025	36	7.5
2030	36	7.7
Percent change 2006-2030	9.6%	18.5%
Annualized change 2006-2030	0.38%	0.71%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	13	2.6
2010	13	2.6
2015	13	2.7
2020	15	3.0
2025	15	3.1
2030	15	3.2
Percent change 2006-2030	13.7%	22.9%
Annualized change 2006-2030	0.54%	0.86%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.7
2020	8	1.7
2025	8	1.8
2030	8	1.8
Percent change 2006-2030	5.0%	13.6%
Annualized change 2006-2030	0.20%	0.53%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	12.4
2010	64	12.7
2015	65	13.1
2020	67	13.7
2025	67	14.0
2030	67	14.3
Percent change 2006-2030	6.5%	15.2%
Annualized change 2006-2030	0.26%	0.59%

Mohawk Valley Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

Figure 93 – Mohawk Valley Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	871	171.7
2010	864	172.0
2015	860	173.4
2020	864	176.8
2025	863	179.8
2030	856	182.4
Percent change 2006-2030	-1.8%	6.2%
Annualized change 2006-2030	-0.07%	0.25%

Figure 94 – Mohawk Valley Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	73.1	2006	500	98.6
2010	368	73.3	2010	496	98.7
2015	369	74.4	2015	491	99.1
2020	371	75.9	2020	493	100.9
2025	373	77.7	2025	490	102.0
2030	371	79.1	2030	485	103.3
Percent change 2006-2030	0.0%	8.2%	Percent change 2006-2030	-3.1%	4.8%
Annualized change 2006-2030	0.00%	0.33%	Annualized change 2006-2030	-0.13%	0.20%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 95 – Mohawk Valley Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	371	73.1	2006	198	39.0
2010	368	73.3	2010	197	39.2
2015	369	74.4	2015	197	39.7
2020	371	75.9	2020	198	40.5
2025	373	77.7	2025	199	41.5
2030	371	79.1	2030	197	42.0
Percent change 2006-2030	0.0%	8.2%	Percent change 2006-2030	-0.5%	7.6%
Annualized change 2006-2030	0.00%	0.33%	Annualized change 2006-2030	-0.02%	0.31%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	126	24.8	2006	47	9.3
2010	126	25.1	2010	45	9.0
2015	127	25.6	2015	45	9.1
2020	129	26.4	2020	44	9.0
2025	131	27.3	2025	43	9.0
2030	132	28.2	2030	42	9.0
Percent change 2006-2030	4.8%	13.3%	Percent change 2006-2030	-10.6%	-3.3%
Annualized change 2006-2030	0.19%	0.52%	Annualized change 2006-2030	-0.47%	-0.14%

Non-Primary Care Specialties

Figure 96 – Mohawk Valley Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	25	4.9
2010	25	4.9
2015	26	5.1
2020	26	5.4
2025	27	5.6
2030	27	5.7
Percent change 2006-2030	6.4%	15.1%
Annualized change 2006-2030	0.26%	0.59%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	53	10.4
2010	53	10.5
2015	53	10.7
2020	53	10.9
2025	54	11.2
2030	53	11.3
Percent change 2006-2030	0.4%	8.6%
Annualized change 2006-2030	0.02%	0.34%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	37	7.3
2010	37	7.3
2015	35	7.1
2020	34	6.9
2025	33	6.8
2030	31	6.7
Percent change 2006-2030	-15.3%	-8.4%
Annualized change 2006-2030	-0.69%	-0.36%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	21	4.1
2010	21	4.1
2015	21	4.2
2020	20	4.2
2025	20	4.2
2030	20	4.3
Percent change 2006-2030	-5.0%	2.8%
Annualized change 2006-2030	-0.21%	0.11%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	12.4
2010	62	12.4
2015	61	12.3
2020	60	12.3
2025	59	12.2
2030	57	12.2
Percent change 2006-2030	-9.5%	-2.1%
Annualized change 2006-2030	-0.42%	-0.09%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	9.3
2010	47	9.3
2015	47	9.5
2020	48	9.7
2025	48	10.0
2030	48	10.1
Percent change 2006-2030	1.1%	9.3%
Annualized change 2006-2030	0.04%	0.37%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	9.3
2010	47	9.3
2015	46	9.3
2020	47	9.5
2025	47	9.8
2030	48	10.1
Percent change 2006-2030	1.1%	9.3%
Annualized change 2006-2030	0.04%	0.37%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	32	6.3
2010	32	6.3
2015	30	6.1
2020	30	6.2
2025	30	6.2
2030	29	6.3
Percent change 2006-2030	-8.0%	-0.5%
Annualized change 2006-2030	-0.35%	-0.02%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	31	6.1
2010	31	6.1
2015	31	6.3
2020	31	6.4
2025	31	6.4
2030	30	6.5
Percent change 2006-2030	-1.9%	6.1%
Annualized change 2006-2030	-0.08%	0.25%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	19	3.7
2010	19	3.8
2015	19	3.8
2020	19	4.0
2025	19	4.0
2030	20	4.3
Percent change 2006-2030	5.0%	13.6%
Annualized change 2006-2030	0.20%	0.53%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.6
2030	8	1.6
Percent change 2006-2030	-5.0%	2.8%
Annualized change 2006-2030	-0.21%	0.11%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	33	6.5
2010	33	6.5
2015	32	6.5
2020	33	6.8
2025	33	6.8
2030	32	6.9
Percent change 2006-2030	-2.1%	5.9%
Annualized change 2006-2030	-0.09%	0.24%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	13	2.6
2010	13	2.6
2015	13	2.6
2020	14	2.8
2025	13	2.8
2030	13	2.8
Percent change 2006-2030	2.3%	10.7%
Annualized change 2006-2030	0.10%	0.42%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.6
2010	8	1.6
2015	8	1.6
2020	8	1.6
2025	8	1.6
2030	8	1.6
Percent change 2006-2030	-5.0%	2.8%
Annualized change 2006-2030	-0.21%	0.11%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	12.4
2010	62	12.4
2015	62	12.5
2020	62	12.7
2025	61	12.8
2030	61	13.0
Percent change 2006-2030	-3.5%	4.4%
Annualized change 2006-2030	-0.15%	0.18%

New York City Physician Demand Forecasts, 2006 – 2030

New York City Demand Scenario 1: Baseline

Figure 97 – New York City Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	39,549	487.1
2010	40,666	490.6
2015	42,424	498.7
2020	44,336	508.4
2025	46,309	519.7
2030	47,959	528.6
Percent change 2006-2030	21.3%	8.5%
Annualized change 2006-2030	0.81%	0.34%

Figure 98 – New York City Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,675	165.0	2010	26,991	325.6
2015	14,215	167.1	2015	28,209	331.6
2020	14,829	170.0	2020	29,507	338.3
2025	15,469	173.6	2025	30,840	346.1
2030	16,012	176.5	2030	31,947	352.1
Percent change 2006-2030	19.9%	7.3%	Percent change 2006-2030	21.9%	9.1%
Annualized change 2006-2030	0.76%	0.29%	Annualized change 2006-2030	0.83%	0.36%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 99 – New York City Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,675	165.0	2010	1,785	21.5
2015	14,215	167.1	2015	1,858	21.8
2020	14,829	170.0	2020	1,936	22.2
2025	15,469	173.6	2025	2,015	22.6
2030	16,012	176.5	2030	2,083	23.0
Percent change 2006-2030	19.9%	7.3%	Percent change 2006-2030	20.0%	7.4%
Annualized change 2006-2030	0.76%	0.29%	Annualized change 2006-2030	0.76%	0.30%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,703	105.0	2010	3,187	38.4
2015	9,148	107.5	2015	3,209	37.7
2020	9,634	110.5	2020	3,259	37.4
2025	10,154	114.0	2025	3,300	37.0
2030	10,593	116.8	2030	3,336	36.8
Percent change 2006-2030	25.8%	12.6%	Percent change 2006-2030	4.4%	-6.6%
Annualized change 2006-2030	0.96%	0.49%	Annualized change 2006-2030	0.18%	-0.28%

Non-Primary Care Specialties

Figure 100 – New York City Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,164	14.3
2010	1,213	14.6
2015	1,299	15.3
2020	1,395	16.0
2025	1,496	16.8
2030	1,577	17.4
Percent change 2006-2030	35.5%	21.2%
Annualized change 2006-2030	1.27%	0.81%

Other Internal Medicine Subspecialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	4,887	60.2
2010	5,072	61.2
2015	5,360	63.0
2020	5,662	64.9
2025	5,965	66.9
2030	6,210	68.4
Percent change 2006-2030	27.1%	13.7%
Annualized change 2006-2030	1.00%	0.54%

Obstetrics and Gynecology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,032	25.0
2010	2,057	24.8
2015	2,082	24.5
2020	2,105	24.1
2025	2,130	23.9
2030	2,152	23.7
Percent change 2006-2030	5.9%	-5.2%
Annualized change 2006-2030	0.24%	-0.22%

Pathology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	864	10.6
2010	892	10.8
2015	932	11.0
2020	973	11.2
2025	1,012	11.4
2030	1,044	11.5
Percent change 2006-2030	20.8%	8.1%
Annualized change 2006-2030	0.79%	0.33%

Psychiatry

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,765	46.4
2010	3,863	46.6
2015	3,984	46.8
2020	4,100	47.0
2025	4,211	47.3
2030	4,312	47.5
Percent change 2006-2030	14.5%	2.5%
Annualized change 2006-2030	0.57%	0.10%

Anesthesiology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,754	21.6
2010	1,806	21.8
2015	1,898	22.3
2020	2,003	23.0
2025	2,115	23.7
2030	2,207	24.3
Percent change 2006-2030	25.8%	12.6%
Annualized change 2006-2030	0.96%	0.50%

Radiology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,688	20.8
2010	1,736	20.9
2015	1,822	21.4
2020	1,921	22.0
2025	2,031	22.8
2030	2,125	23.4
Percent change 2006-2030	25.9%	12.7%
Annualized change 2006-2030	0.96%	0.50%

Emergency Medicine

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,301	16.0
2010	1,327	16.0
2015	1,363	16.0
2020	1,401	16.1
2025	1,440	16.2
2030	1,473	16.2
Percent change 2006-2030	13.2%	1.3%
Annualized change 2006-2030	0.52%	0.05%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,404	17.3
2010	1,454	17.5
2015	1,530	18.0
2020	1,609	18.4
2025	1,687	18.9
2030	1,750	19.3
Percent change 2006-2030	24.6%	11.5%
Annualized change 2006-2030	0.92%	0.46%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,007	12.4
2010	1,041	12.6
2015	1,102	13.0
2020	1,172	13.4
2025	1,246	14.0
2030	1,306	14.4
Percent change 2006-2030	29.7%	16.1%
Annualized change 2006-2030	1.09%	0.62%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	413	5.1
2010	423	5.1
2015	439	5.2
2020	456	5.2
2025	473	5.3
2030	487	5.4
Percent change 2006-2030	17.9%	5.5%
Annualized change 2006-2030	0.69%	0.22%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	879	10.8
2010	904	10.9
2015	947	11.1
2020	995	11.4
2025	1,047	11.7
2030	1,091	12.0
Percent change 2006-2030	24.1%	11.1%
Annualized change 2006-2030	0.90%	0.44%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	425	5.2
2010	442	5.3
2015	470	5.5
2020	501	5.7
2025	533	6.0
2030	559	6.2
Percent change 2006-2030	31.5%	17.7%
Annualized change 2006-2030	1.15%	0.68%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	697	8.6
2010	724	8.7
2015	765	9.0
2020	808	9.3
2025	849	9.5
2030	881	9.7
Percent change 2006-2030	26.4%	13.1%
Annualized change 2006-2030	0.98%	0.51%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,917	48.2
2010	4,037	48.7
2015	4,216	49.6
2020	4,406	50.5
2025	4,605	51.7
2030	4,773	52.6
Percent change 2006-2030	21.9%	9.0%
Annualized change 2006-2030	0.83%	0.36%

New York City Demand Scenario 2: Growing Economy

Figure 101 – New York City Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	39,549	487.1
2010	41,487	500.5
2015	44,384	521.7
2020	47,574	545.5
2025	50,974	572.0
2030	54,157	596.9
Percent change 2006-2030	36.9%	22.5%
Annualized change 2006-2030	1.32%	0.85%

Figure 102 – New York City Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,838	166.9	2010	27,649	333.5
2015	14,599	171.6	2015	29,785	350.1
2020	15,458	177.2	2020	32,117	368.3
2025	16,365	183.7	2025	34,608	388.4
2030	17,193	189.5	2030	36,964	407.4
Percent change 2006-2030	28.8%	15.2%	Percent change 2006-2030	41.1%	26.3%
Annualized change 2006-2030	1.06%	0.59%	Annualized change 2006-2030	1.44%	0.98%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 103 – New York City Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,838	166.9	2010	1,806	21.8
2015	14,599	171.6	2015	1,908	22.4
2020	15,458	177.2	2020	2,018	23.1
2025	16,365	183.7	2025	2,132	23.9
2030	17,193	189.5	2030	2,237	24.7
Percent change 2006-2030	28.8%	15.2%	Percent change 2006-2030	28.8%	15.3%
Annualized change 2006-2030	1.06%	0.59%	Annualized change 2006-2030	1.06%	0.59%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,807	106.2	2010	3,225	38.9
2015	9,395	110.4	2015	3,296	38.7
2020	10,042	115.2	2020	3,397	39.0
2025	10,742	120.6	2025	3,491	39.2
2030	11,374	125.4	2030	3,582	39.5
Percent change 2006-2030	35.1%	20.9%	Percent change 2006-2030	12.1%	0.3%
Annualized change 2006-2030	1.26%	0.79%	Annualized change 2006-2030	0.48%	0.01%

Non-Primary Care Specialties

Figure 104 – New York City Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,164	14.3
2010	1,245	15.0
2015	1,377	16.2
2020	1,527	17.5
2025	1,691	19.0
2030	1,841	20.3
Percent change 2006-2030	58.2%	41.6%
Annualized change 2006-2030	1.93%	1.46%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	4,887	60.2
2010	5,205	62.8
2015	5,681	66.8
2020	6,198	71.1
2025	6,744	75.7
2030	7,251	79.9
Percent change 2006-2030	48.4%	32.8%
Annualized change 2006-2030	1.66%	1.19%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,032	25.0
2010	2,082	25.1
2015	2,138	25.1
2020	2,194	25.2
2025	2,253	25.3
2030	2,311	25.5
Percent change 2006-2030	13.7%	1.8%
Annualized change 2006-2030	0.54%	0.07%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	864	10.6
2010	915	11.0
2015	988	11.6
2020	1,065	12.2
2025	1,144	12.8
2030	1,219	13.4
Percent change 2006-2030	41.1%	26.3%
Annualized change 2006-2030	1.44%	0.98%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,765	46.4
2010	3,964	47.8
2015	4,223	49.6
2020	4,488	51.5
2025	4,761	53.4
2030	5,035	55.5
Percent change 2006-2030	33.7%	19.7%
Annualized change 2006-2030	1.22%	0.75%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,754	21.6
2010	1,853	22.4
2015	2,012	23.6
2020	2,193	25.1
2025	2,391	26.8
2030	2,577	28.4
Percent change 2006-2030	46.9%	31.5%
Annualized change 2006-2030	1.62%	1.15%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,688	20.8
2010	1,781	21.5
2015	1,931	22.7
2020	2,103	24.1
2025	2,296	25.8
2030	2,481	27.3
Percent change 2006-2030	47.0%	31.5%
Annualized change 2006-2030	1.62%	1.15%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,301	16.0
2010	1,343	16.2
2015	1,400	16.5
2020	1,460	16.7
2025	1,523	17.1
2030	1,582	17.4
Percent change 2006-2030	21.6%	8.8%
Annualized change 2006-2030	0.82%	0.35%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,404	17.3
2010	1,492	18.0
2015	1,622	19.1
2020	1,761	20.2
2025	1,907	21.4
2030	2,043	22.5
Percent change 2006-2030	45.5%	30.2%
Annualized change 2006-2030	1.58%	1.11%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,007	12.4
2010	1,068	12.9
2015	1,168	13.7
2020	1,283	14.7
2025	1,409	15.8
2030	1,525	16.8
Percent change 2006-2030	51.4%	35.5%
Annualized change 2006-2030	1.74%	1.27%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	413	5.1
2010	434	5.2
2015	465	5.5
2020	499	5.7
2025	535	6.0
2030	569	6.3
Percent change 2006-2030	37.7%	23.2%
Annualized change 2006-2030	1.34%	0.87%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	879	10.8
2010	928	11.2
2015	1,004	11.8
2020	1,089	12.5
2025	1,184	13.3
2030	1,274	14.0
Percent change 2006-2030	44.9%	29.7%
Annualized change 2006-2030	1.56%	1.09%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	425	5.2
2010	454	5.5
2015	498	5.9
2020	548	6.3
2025	603	6.8
2030	653	7.2
Percent change 2006-2030	53.6%	37.4%
Annualized change 2006-2030	1.80%	1.33%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	697	8.6
2010	743	9.0
2015	811	9.5
2020	884	10.1
2025	960	10.8
2030	1,029	11.3
Percent change 2006-2030	47.6%	32.1%
Annualized change 2006-2030	1.64%	1.17%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,917	48.2
2010	4,143	50.0
2015	4,468	52.5
2020	4,823	55.3
2025	5,206	58.4
2030	5,573	61.4
Percent change 2006-2030	42.3%	27.3%
Annualized change 2006-2030	1.48%	1.01%

New York City Demand Scenario 3: Universal Health Insurance by 2020

Figure 105 – New York City Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	39,549	487.1
2010	41,226	497.3
2015	43,754	514.3
2020	46,523	533.5
2025	48,597	545.4
2030	50,332	554.7
Percent change 2006-2030	27.3%	13.9%
Annualized change 2006-2030	1.01%	0.54%

Figure 106 – New York City Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,884	167.5	2010	27,342	329.8
2015	14,710	172.9	2015	29,044	341.4
2020	15,641	179.4	2020	30,882	354.1
2025	16,317	183.1	2025	32,280	362.3
2030	16,891	186.2	2030	33,441	368.6
Percent change 2006-2030	26.5%	13.2%	Percent change 2006-2030	27.7%	14.2%
Annualized change 2006-2030	0.98%	0.52%	Annualized change 2006-2030	1.02%	0.56%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 107 – New York City Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,884	167.5	2010	1,802	21.7
2015	14,710	172.9	2015	1,898	22.3
2020	15,641	179.4	2020	2,002	23.0
2025	16,317	183.1	2025	2,083	23.4
2030	16,891	186.2	2030	2,154	23.7
Percent change 2006-2030	26.5%	13.2%	Percent change 2006-2030	24.1%	11.0%
Annualized change 2006-2030	0.98%	0.52%	Annualized change 2006-2030	0.90%	0.44%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,852	106.8	2010	3,230	39.0
2015	9,505	111.7	2015	3,307	38.9
2020	10,225	117.2	2020	3,415	39.2
2025	10,776	120.9	2025	3,458	38.8
2030	11,242	123.9	2030	3,496	38.5
Percent change 2006-2030	33.5%	19.5%	Percent change 2006-2030	9.4%	-2.1%
Annualized change 2006-2030	1.21%	0.74%	Annualized change 2006-2030	0.37%	-0.09%

Non-Primary Care Specialties

Figure 108 – New York City Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,164	14.3
2010	1,228	14.8
2015	1,334	15.7
2020	1,455	16.7
2025	1,560	17.5
2030	1,645	18.1
Percent change 2006-2030	41.3%	26.4%
Annualized change 2006-2030	1.45%	0.98%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	4,887	60.2
2010	5,154	62.2
2015	5,556	65.3
2020	5,987	68.7
2025	6,307	70.8
2030	6,566	72.4
Percent change 2006-2030	34.4%	20.2%
Annualized change 2006-2030	1.24%	0.77%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,032	25.0
2010	2,085	25.2
2015	2,146	25.2
2020	2,207	25.3
2025	2,233	25.1
2030	2,256	24.9
Percent change 2006-2030	11.0%	-0.7%
Annualized change 2006-2030	0.44%	-0.03%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	864	10.6
2010	907	10.9
2015	968	11.4
2020	1,032	11.8
2025	1,073	12.0
2030	1,107	12.2
Percent change 2006-2030	28.2%	14.7%
Annualized change 2006-2030	1.04%	0.57%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,765	46.4
2010	3,915	47.2
2015	4,107	48.3
2020	4,298	49.3
2025	4,414	49.5
2030	4,520	49.8
Percent change 2006-2030	20.1%	7.4%
Annualized change 2006-2030	0.76%	0.30%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,754	21.6
2010	1,834	22.1
2015	1,964	23.1
2020	2,113	24.2
2025	2,231	25.0
2030	2,328	25.7
Percent change 2006-2030	32.7%	18.8%
Annualized change 2006-2030	1.19%	0.72%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,688	20.8
2010	1,765	21.3
2015	1,892	22.2
2020	2,037	23.4
2025	2,154	24.2
2030	2,253	24.8
Percent change 2006-2030	33.5%	19.4%
Annualized change 2006-2030	1.21%	0.74%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,301	16.0
2010	1,309	15.8
2015	1,321	15.5
2020	1,334	15.3
2025	1,371	15.4
2030	1,402	15.5
Percent change 2006-2030	7.8%	-3.5%
Annualized change 2006-2030	0.31%	-0.15%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,404	17.3
2010	1,476	17.8
2015	1,583	18.6
2020	1,696	19.4
2025	1,778	20.0
2030	1,845	20.3
Percent change 2006-2030	31.4%	17.6%
Annualized change 2006-2030	1.14%	0.68%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,007	12.4
2010	1,047	12.6
2015	1,117	13.1
2020	1,196	13.7
2025	1,272	14.3
2030	1,333	14.7
Percent change 2006-2030	32.4%	18.5%
Annualized change 2006-2030	1.18%	0.71%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	413	5.1
2010	428	5.2
2015	451	5.3
2020	475	5.4
2025	492	5.5
2030	507	5.6
Percent change 2006-2030	22.8%	9.9%
Annualized change 2006-2030	0.86%	0.39%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	879	10.8
2010	920	11.1
2015	985	11.6
2020	1,058	12.1
2025	1,114	12.5
2030	1,160	12.8
Percent change 2006-2030	32.0%	18.1%
Annualized change 2006-2030	1.16%	0.70%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	425	5.2
2010	449	5.4
2015	487	5.7
2020	529	6.1
2025	563	6.3
2030	590	6.5
Percent change 2006-2030	38.8%	24.2%
Annualized change 2006-2030	1.38%	0.91%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	697	8.6
2010	734	8.9
2015	789	9.3
2020	848	9.7
2025	891	10.0
2030	925	10.2
Percent change 2006-2030	32.7%	18.8%
Annualized change 2006-2030	1.19%	0.72%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,917	48.2
2010	4,092	49.4
2015	4,346	51.1
2020	4,618	53.0
2025	4,827	54.2
2030	5,003	55.1
Percent change 2006-2030	27.7%	14.3%
Annualized change 2006-2030	1.02%	0.56%

New York City Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

Figure 109 – New York City Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	39,549	487.1
2010	40,436	487.8
2015	41,887	492.3
2020	43,466	498.4
2025	45,082	505.9
2030	46,362	511.0
Percent change 2006-2030	17.2%	4.9%
Annualized change 2006-2030	0.66%	0.20%

Figure 110 – New York City Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	13,352	164.4	2006	26,197	322.7
2010	13,675	165.0	2010	26,761	322.8
2015	14,215	167.1	2015	27,672	325.3
2020	14,829	170.0	2020	28,637	328.4
2025	15,469	173.6	2025	29,613	332.3
2030	16,012	176.5	2030	30,350	334.5
Percent change 2006-2030	19.9%	7.3%	Percent change 2006-2030	15.9%	3.7%
Annualized change 2006-2030	0.76%	0.29%	Annualized change 2006-2030	0.61%	0.15%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 111 – New York City Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	13,352	164.4	2006	1,736	21.4
2010	13,675	165.0	2010	1,785	21.5
2015	14,215	167.1	2015	1,858	21.8
2020	14,829	170.0	2020	1,936	22.2
2025	15,469	173.6	2025	2,015	22.6
2030	16,012	176.5	2030	2,083	23.0
Percent change 2006-2030	19.9%	7.3%	Percent change 2006-2030	20.0%	7.4%
Annualized change 2006-2030	0.76%	0.29%	Annualized change 2006-2030	0.76%	0.30%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	8,420	103.7	2006	3,196	39.4
2010	8,703	105.0	2010	3,187	38.4
2015	9,148	107.5	2015	3,209	37.7
2020	9,634	110.5	2020	3,259	37.4
2025	10,154	114.0	2025	3,300	37.0
2030	10,593	116.8	2030	3,336	36.8
Percent change 2006-2030	25.8%	12.6%	Percent change 2006-2030	4.4%	-6.6%
Annualized change 2006-2030	0.96%	0.49%	Annualized change 2006-2030	0.18%	-0.28%

Non-Primary Care Specialties

Figure 112 – New York City Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,164	14.3
2010	1,203	14.5
2015	1,274	15.0
2020	1,354	15.5
2025	1,436	16.1
2030	1,498	16.5
Percent change 2006-2030	28.7%	15.2%
Annualized change 2006-2030	1.06%	0.59%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	4,887	60.2
2010	5,029	60.7
2015	5,258	61.8
2020	5,495	63.0
2025	5,728	64.3
2030	5,900	65.0
Percent change 2006-2030	20.7%	8.0%
Annualized change 2006-2030	0.79%	0.32%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	2,032	25.0
2010	2,039	24.6
2015	2,042	24.0
2020	2,043	23.4
2025	2,045	23.0
2030	2,044	22.5
Percent change 2006-2030	0.6%	-10.0%
Annualized change 2006-2030	0.03%	-0.44%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	864	10.6
2010	884	10.7
2015	914	10.7
2020	944	10.8
2025	972	10.9
2030	992	10.9
Percent change 2006-2030	14.8%	2.7%
Annualized change 2006-2030	0.58%	0.11%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,765	46.4
2010	3,830	46.2
2015	3,908	45.9
2020	3,979	45.6
2025	4,043	45.4
2030	4,096	45.1
Percent change 2006-2030	8.8%	-2.6%
Annualized change 2006-2030	0.35%	-0.11%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,754	21.6
2010	1,791	21.6
2015	1,862	21.9
2020	1,944	22.3
2025	2,031	22.8
2030	2,097	23.1
Percent change 2006-2030	19.5%	7.0%
Annualized change 2006-2030	0.75%	0.28%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,688	20.8
2010	1,721	20.8
2015	1,787	21.0
2020	1,864	21.4
2025	1,950	21.9
2030	2,019	22.2
Percent change 2006-2030	19.6%	7.0%
Annualized change 2006-2030	0.75%	0.28%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,301	16.0
2010	1,316	15.9
2015	1,337	15.7
2020	1,360	15.6
2025	1,383	15.5
2030	1,399	15.4
Percent change 2006-2030	7.6%	-3.7%
Annualized change 2006-2030	0.30%	-0.16%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,404	17.3
2010	1,442	17.4
2015	1,501	17.6
2020	1,562	17.9
2025	1,620	18.2
2030	1,663	18.3
Percent change 2006-2030	18.4%	6.0%
Annualized change 2006-2030	0.71%	0.24%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,007	12.4
2010	1,032	12.5
2015	1,081	12.7
2020	1,137	13.0
2025	1,196	13.4
2030	1,241	13.7
Percent change 2006-2030	23.2%	10.3%
Annualized change 2006-2030	0.87%	0.41%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	413	5.1
2010	419	5.1
2015	431	5.1
2020	443	5.1
2025	454	5.1
2030	463	5.1
Percent change 2006-2030	12.0%	0.2%
Annualized change 2006-2030	0.47%	0.01%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	879	10.8
2010	896	10.8
2015	929	10.9
2020	966	11.1
2025	1,005	11.3
2030	1,036	11.4
Percent change 2006-2030	17.9%	5.5%
Annualized change 2006-2030	0.69%	0.22%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	425	5.2
2010	438	5.3
2015	461	5.4
2020	486	5.6
2025	512	5.7
2030	531	5.9
Percent change 2006-2030	25.0%	11.8%
Annualized change 2006-2030	0.93%	0.47%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	697	8.6
2010	718	8.7
2015	750	8.8
2020	784	9.0
2025	815	9.1
2030	837	9.2
Percent change 2006-2030	20.1%	7.5%
Annualized change 2006-2030	0.77%	0.30%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,917	48.2
2010	4,003	48.3
2015	4,136	48.6
2020	4,276	49.0
2025	4,422	49.6
2030	4,534	50.0
Percent change 2006-2030	15.8%	3.6%
Annualized change 2006-2030	0.61%	0.15%

North Country Physician Demand Forecasts, 2006 – 2030

North Country Demand Scenario 1: Baseline

Figure 113 – North Country Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	755	177.4
2010	765	178.0
2015	785	180.1
2020	804	182.6
2025	824	185.5
2030	839	187.6
Percent change 2006-2030	11.1%	5.7%
Annualized change 2006-2030	0.44%	0.23%

Figure 114 – North Country Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	274	63.7	2010	491	114.2
2015	282	64.7	2015	503	115.4
2020	288	65.4	2020	516	117.2
2025	296	66.6	2025	528	118.8
2030	301	67.3	2030	538	120.3
Percent change 2006-2030	11.1%	5.7%	Percent change 2006-2030	11.2%	5.8%
Annualized change 2006-2030	0.44%	0.23%	Annualized change 2006-2030	0.44%	0.23%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 115 – North Country Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	274	63.7	2010	121	28.2
2015	282	64.7	2015	124	28.5
2020	288	65.4	2020	126	28.6
2025	296	66.6	2025	130	29.3
2030	301	67.3	2030	132	29.5
Percent change 2006-2030	11.1%	5.7%	Percent change 2006-2030	10.9%	5.5%
Annualized change 2006-2030	0.44%	0.23%	Annualized change 2006-2030	0.43%	0.22%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	103	24.0	2010	50	11.6
2015	106	24.3	2015	52	11.9
2020	109	24.7	2020	53	12.0
2025	113	25.4	2025	53	11.9
2030	116	25.9	2030	53	11.8
Percent change 2006-2030	14.9%	9.3%	Percent change 2006-2030	3.9%	-1.1%
Annualized change 2006-2030	0.58%	0.37%	Annualized change 2006-2030	0.16%	-0.05%

Non-Primary Care Specialties

Figure 116 – North Country Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.1
2020	9	2.0
2025	9	2.0
2030	10	2.2
Percent change 2006-2030	25.0%	18.9%
Annualized change 2006-2030	0.93%	0.73%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	51	12.0
2010	52	12.1
2015	54	12.4
2020	56	12.7
2025	58	13.1
2030	59	13.2
Percent change 2006-2030	15.7%	10.1%
Annualized change 2006-2030	0.61%	0.40%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	50	11.7
2010	50	11.6
2015	50	11.5
2020	49	11.1
2025	50	11.3
2030	50	11.2
Percent change 2006-2030	0.0%	-4.9%
Annualized change 2006-2030	0.00%	-0.21%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	14	3.3
2010	14	3.3
2015	15	3.4
2020	15	3.4
2025	15	3.4
2030	15	3.4
Percent change 2006-2030	7.1%	1.9%
Annualized change 2006-2030	0.29%	0.08%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	50	11.7
2010	51	11.9
2015	51	11.7
2020	52	11.8
2025	52	11.7
2030	53	11.8
Percent change 2006-2030	6.0%	0.9%
Annualized change 2006-2030	0.24%	0.04%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	33	7.8
2010	34	7.9
2015	35	8.0
2020	36	8.2
2025	37	8.3
2030	38	8.5
Percent change 2006-2030	15.2%	9.6%
Annualized change 2006-2030	0.59%	0.38%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	45	10.6
2010	46	10.7
2015	47	10.8
2020	49	11.1
2025	51	11.5
2030	52	11.6
Percent change 2006-2030	15.6%	9.9%
Annualized change 2006-2030	0.60%	0.40%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	66	15.5
2010	67	15.6
2015	68	15.6
2020	69	15.7
2025	70	15.8
2030	71	15.9
Percent change 2006-2030	7.6%	2.4%
Annualized change 2006-2030	0.30%	0.10%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	30	7.0
2010	31	7.2
2015	32	7.3
2020	33	7.5
2025	33	7.4
2030	34	7.6
Percent change 2006-2030	13.3%	7.8%
Annualized change 2006-2030	0.52%	0.31%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	20	4.7
2010	20	4.7
2015	21	4.8
2020	22	5.0
2025	23	5.2
2030	24	5.4
Percent change 2006-2030	20.0%	14.2%
Annualized change 2006-2030	0.76%	0.55%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	13	3.0
2025	13	2.9
2030	13	2.9
Percent change 2006-2030	8.3%	3.1%
Annualized change 2006-2030	0.33%	0.13%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	27	6.3
2010	27	6.3
2015	28	6.4
2020	29	6.6
2025	30	6.8
2030	31	6.9
Percent change 2006-2030	14.8%	9.2%
Annualized change 2006-2030	0.58%	0.37%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	11	2.6
2010	11	2.6
2015	12	2.8
2020	12	2.7
2025	13	2.9
2030	13	2.9
Percent change 2006-2030	18.2%	12.4%
Annualized change 2006-2030	0.70%	0.49%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.6
2020	8	1.8
2025	8	1.8
2030	8	1.8
Percent change 2006-2030	14.3%	8.7%
Annualized change 2006-2030	0.56%	0.35%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	14.1
2010	61	14.2
2015	62	14.2
2020	64	14.5
2025	66	14.9
2030	67	15.0
Percent change 2006-2030	11.7%	6.2%
Annualized change 2006-2030	0.46%	0.25%

North Country Demand Scenario 2: Growing Economy

Figure 117 – North Country Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	755	177.4
2010	779	181.3
2015	819	187.9
2020	859	195.0
2025	901	202.9
2030	940	210.1
Percent change 2006-2030	24.5%	18.5%
Annualized change 2006-2030	0.92%	0.71%

Figure 118 – North Country Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	277	64.5	2010	502	116.8
2015	290	66.5	2015	529	121.4
2020	300	68.2	2020	559	126.9
2025	313	70.5	2025	588	132.4
2030	323	72.2	2030	617	137.9
Percent change 2006-2030	19.3%	13.5%	Percent change 2006-2030	27.5%	21.3%
Annualized change 2006-2030	0.74%	0.53%	Annualized change 2006-2030	1.02%	0.81%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 119 – North Country Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	277	64.5	2010	122	28.5
2015	290	66.5	2015	127	29.2
2020	300	68.2	2020	131	29.8
2025	313	70.5	2025	138	31.0
2030	323	72.2	2030	142	31.7
Percent change 2006-2030	19.3%	13.5%	Percent change 2006-2030	19.1%	13.3%
Annualized change 2006-2030	0.74%	0.53%	Annualized change 2006-2030	0.73%	0.52%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	104	24.2	2010	51	11.8
2015	109	25.0	2015	53	12.3
2020	114	25.8	2020	55	12.5
2025	120	26.9	2025	56	12.6
2030	125	27.8	2030	57	12.7
Percent change 2006-2030	23.3%	17.3%	Percent change 2006-2030	11.6%	6.2%
Annualized change 2006-2030	0.88%	0.67%	Annualized change 2006-2030	0.46%	0.25%

Non-Primary Care Specialties

Figure 120 – North Country Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	10	2.2
2020	10	2.2
2025	10	2.3
2030	12	2.6
Percent change 2006-2030	46.0%	38.9%
Annualized change 2006-2030	1.59%	1.38%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	51	12.0
2010	53	12.4
2015	57	13.1
2020	61	13.9
2025	66	14.8
2030	69	15.4
Percent change 2006-2030	35.1%	28.5%
Annualized change 2006-2030	1.26%	1.05%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	50	11.7
2010	51	11.8
2015	51	11.8
2020	51	11.6
2025	53	11.9
2030	54	12.0
Percent change 2006-2030	7.4%	2.2%
Annualized change 2006-2030	0.30%	0.09%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	14	3.3
2010	14	3.3
2015	16	3.6
2020	16	3.7
2025	17	3.8
2030	18	3.9
Percent change 2006-2030	25.1%	19.0%
Annualized change 2006-2030	0.94%	0.73%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	50	11.7
2010	52	12.2
2015	54	12.4
2020	57	12.9
2025	59	13.2
2030	62	13.8
Percent change 2006-2030	23.8%	17.8%
Annualized change 2006-2030	0.89%	0.68%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	33	7.8
2010	35	8.1
2015	37	8.5
2020	39	8.9
2025	42	9.4
2030	44	9.9
Percent change 2006-2030	34.5%	27.9%
Annualized change 2006-2030	1.24%	1.03%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	45	10.6
2010	47	11.0
2015	50	11.4
2020	54	12.2
2025	58	13.0
2030	61	13.6
Percent change 2006-2030	34.9%	28.4%
Annualized change 2006-2030	1.26%	1.05%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	66	15.5
2010	68	15.8
2015	70	16.0
2020	72	16.3
2025	74	16.7
2030	76	17.0
Percent change 2006-2030	15.5%	9.9%
Annualized change 2006-2030	0.60%	0.39%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	30	7.0
2010	32	7.4
2015	34	7.8
2020	36	8.2
2025	37	8.4
2030	40	8.9
Percent change 2006-2030	32.3%	25.9%
Annualized change 2006-2030	1.17%	0.96%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	20	4.7
2010	21	4.8
2015	22	5.1
2020	24	5.5
2025	26	5.9
2030	28	6.3
Percent change 2006-2030	40.1%	33.3%
Annualized change 2006-2030	1.42%	1.21%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	12	2.8
2010	12	2.9
2015	13	2.9
2020	14	3.2
2025	15	3.3
2030	15	3.4
Percent change 2006-2030	26.5%	20.4%
Annualized change 2006-2030	0.98%	0.78%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	27	6.3
2010	28	6.4
2015	30	6.8
2020	32	7.2
2025	34	7.6
2030	36	8.1
Percent change 2006-2030	34.1%	27.6%
Annualized change 2006-2030	1.23%	1.02%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	11	2.6
2010	11	2.6
2015	13	2.9
2020	13	3.0
2025	15	3.3
2030	15	3.4
Percent change 2006-2030	38.0%	31.3%
Annualized change 2006-2030	1.35%	1.14%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	7	1.6
2010	7	1.7
2015	7	1.7
2020	9	2.0
2025	9	2.0
2030	9	2.1
Percent change 2006-2030	33.5%	27.0%
Annualized change 2006-2030	1.21%	1.00%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	14.1
2010	63	14.6
2015	66	15.1
2020	70	15.9
2025	75	16.8
2030	78	17.5
Percent change 2006-2030	30.4%	24.1%
Annualized change 2006-2030	1.11%	0.90%

North Country Demand Scenario 3: Universal Health Insurance by 2020

Figure 121 – North Country Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	755	177.4
2010	774	180.0
2015	806	184.9
2020	837	190.1
2025	858	193.2
2030	874	195.3
Percent change 2006-2030	15.7%	10.1%
Annualized change 2006-2030	0.61%	0.40%

Figure 122 – North Country Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	278	64.6	2010	496	115.4
2015	290	66.6	2015	515	118.2
2020	301	68.5	2020	536	121.7
2025	310	69.7	2025	548	123.4
2030	315	70.4	2030	559	124.9
Percent change 2006-2030	16.3%	10.6%	Percent change 2006-2030	15.4%	9.8%
Annualized change 2006-2030	0.63%	0.42%	Annualized change 2006-2030	0.60%	0.39%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 123 – North Country Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	278	64.6	2010	122	28.4
2015	290	66.6	2015	127	29.1
2020	301	68.5	2020	130	29.6
2025	310	69.7	2025	134	30.3
2030	315	70.4	2030	136	30.5
Percent change 2006-2030	16.3%	10.6%	Percent change 2006-2030	14.7%	9.1%
Annualized change 2006-2030	0.63%	0.42%	Annualized change 2006-2030	0.57%	0.36%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	105	24.4	2010	51	11.8
2015	110	25.3	2015	54	12.3
2020	116	26.3	2020	56	12.6
2025	120	27.0	2025	56	12.5
2030	123	27.5	2030	56	12.4
Percent change 2006-2030	21.9%	16.0%	Percent change 2006-2030	8.9%	3.6%
Annualized change 2006-2030	0.83%	0.62%	Annualized change 2006-2030	0.36%	0.15%

Non-Primary Care Specialties

Figure 124 – North Country Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.9
2010	8	1.9
2015	9	2.1
2020	9	2.1
2025	9	2.1
2030	10	2.3
Percent change 2006-2030	30.4%	24.0%
Annualized change 2006-2030	1.11%	0.90%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	51	12.0
2010	53	12.3
2015	56	12.8
2020	59	13.4
2025	61	13.8
2030	62	13.9
Percent change 2006-2030	22.3%	16.4%
Annualized change 2006-2030	0.84%	0.63%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	50	11.7
2010	51	11.8
2015	52	11.8
2020	51	11.7
2025	52	11.8
2030	52	11.7
Percent change 2006-2030	4.8%	-0.3%
Annualized change 2006-2030	0.20%	-0.01%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	14	3.3
2010	14	3.3
2015	16	3.6
2020	16	3.6
2025	16	3.6
2030	16	3.6
Percent change 2006-2030	13.6%	8.1%
Annualized change 2006-2030	0.53%	0.33%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	50	11.7
2010	52	12.0
2015	53	12.1
2020	55	12.4
2025	55	12.3
2030	56	12.4
Percent change 2006-2030	11.1%	5.7%
Annualized change 2006-2030	0.44%	0.23%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	33	7.8
2010	35	8.0
2015	36	8.3
2020	38	8.6
2025	39	8.8
2030	40	9.0
Percent change 2006-2030	21.4%	15.6%
Annualized change 2006-2030	0.81%	0.60%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	45	10.6
2010	47	10.9
2015	49	11.2
2020	52	11.8
2025	54	12.2
2030	55	12.3
Percent change 2006-2030	22.5%	16.6%
Annualized change 2006-2030	0.85%	0.64%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	66	15.5
2010	66	15.4
2015	66	15.1
2020	66	14.9
2025	67	15.0
2030	68	15.1
Percent change 2006-2030	2.4%	-2.6%
Annualized change 2006-2030	0.10%	-0.11%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	30	7.0
2010	31	7.3
2015	33	7.6
2020	35	7.9
2025	35	7.8
2030	36	8.0
Percent change 2006-2030	19.5%	13.7%
Annualized change 2006-2030	0.74%	0.53%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	20	4.7
2010	20	4.7
2015	21	4.9
2020	22	5.1
2025	23	5.3
2030	24	5.5
Percent change 2006-2030	22.5%	16.5%
Annualized change 2006-2030	0.85%	0.64%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.8
2020	14	3.1
2025	14	3.0
2030	14	3.0
Percent change 2006-2030	12.8%	7.3%
Annualized change 2006-2030	0.50%	0.29%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	27	6.3
2010	27	6.4
2015	29	6.7
2020	31	7.0
2025	32	7.2
2030	33	7.4
Percent change 2006-2030	22.1%	16.2%
Annualized change 2006-2030	0.84%	0.63%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	11	2.6
2010	11	2.6
2015	12	2.9
2020	13	2.9
2025	14	3.1
2030	14	3.1
Percent change 2006-2030	24.7%	18.7%
Annualized change 2006-2030	0.93%	0.72%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	7	1.6
2010	7	1.7
2015	7	1.7
2020	8	1.9
2025	8	1.9
2030	8	1.9
Percent change 2006-2030	20.0%	14.2%
Annualized change 2006-2030	0.76%	0.55%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	14.1
2010	62	14.4
2015	64	14.7
2020	67	15.2
2025	69	15.6
2030	70	15.7
Percent change 2006-2030	17.0%	11.4%
Annualized change 2006-2030	0.66%	0.45%

North Country Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

Figure 125 – North Country Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	755	177.4
2010	761	177.0
2015	775	177.9
2020	789	179.1
2025	803	180.7
2030	812	181.5
Percent change 2006-2030	7.6%	2.3%
Annualized change 2006-2030	0.30%	0.10%

Figure 126 – North Country Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	271	63.7	2006	484	113.7
2010	274	63.7	2010	487	113.3
2015	282	64.7	2015	493	113.2
2020	288	65.4	2020	501	113.7
2025	296	66.6	2025	507	114.1
2030	301	67.3	2030	511	114.3
Percent change 2006-2030	11.1%	5.7%	Percent change 2006-2030	5.6%	0.5%
Annualized change 2006-2030	0.44%	0.23%	Annualized change 2006-2030	0.23%	0.02%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 127 – North Country Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	271	63.7	2006	119	28.0
2010	274	63.7	2010	121	28.2
2015	282	64.7	2015	124	28.5
2020	288	65.4	2020	126	28.6
2025	296	66.6	2025	130	29.3
2030	301	67.3	2030	132	29.5
Percent change 2006-2030	11.1%	5.7%	Percent change 2006-2030	10.9%	5.5%
Annualized change 2006-2030	0.44%	0.23%	Annualized change 2006-2030	0.43%	0.22%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	101	23.7	2006	51	12.0
2010	103	24.0	2010	50	11.6
2015	106	24.3	2015	52	11.9
2020	109	24.7	2020	53	12.0
2025	113	25.4	2025	53	11.9
2030	116	25.9	2030	53	11.8
Percent change 2006-2030	14.9%	9.3%	Percent change 2006-2030	3.9%	-1.1%
Annualized change 2006-2030	0.58%	0.37%	Annualized change 2006-2030	0.16%	-0.05%

Non-Primary Care Specialties

Figure 128 – North Country Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	8	1.9
2010	8	1.8
2015	9	2.0
2020	9	2.0
2025	9	1.9
2030	10	2.1
Percent change 2006-2030	18.8%	13.0%
Annualized change 2006-2030	0.72%	0.51%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	51	12.0
2010	52	12.0
2015	53	12.2
2020	54	12.3
2025	56	12.5
2030	56	12.5
Percent change 2006-2030	9.9%	4.6%
Annualized change 2006-2030	0.39%	0.19%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	50	11.7
2010	50	11.5
2015	49	11.3
2020	48	10.8
2025	48	10.8
2030	48	10.6
Percent change 2006-2030	-5.0%	-9.6%
Annualized change 2006-2030	-0.21%	-0.42%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	14	3.3
2010	14	3.2
2015	15	3.4
2020	15	3.3
2025	14	3.2
2030	14	3.2
Percent change 2006-2030	1.8%	-3.2%
Annualized change 2006-2030	0.07%	-0.13%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	50	11.7
2010	51	11.8
2015	50	11.5
2020	50	11.5
2025	50	11.2
2030	50	11.3
Percent change 2006-2030	0.7%	-4.2%
Annualized change 2006-2030	0.03%	-0.18%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	33	7.8
2010	34	7.8
2015	34	7.9
2020	35	7.9
2025	36	8.0
2030	36	8.1
Percent change 2006-2030	9.4%	4.1%
Annualized change 2006-2030	0.37%	0.17%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	45	10.6
2010	46	10.6
2015	46	10.6
2020	48	10.8
2025	49	11.0
2030	49	11.0
Percent change 2006-2030	9.8%	4.4%
Annualized change 2006-2030	0.39%	0.18%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	66	15.5
2010	66	15.5
2015	67	15.3
2020	67	15.2
2025	67	15.1
2030	67	15.1
Percent change 2006-2030	2.2%	-2.8%
Annualized change 2006-2030	0.09%	-0.12%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	30	7.0
2010	31	7.2
2015	31	7.2
2020	32	7.3
2025	32	7.1
2030	32	7.2
Percent change 2006-2030	7.7%	2.4%
Annualized change 2006-2030	0.31%	0.10%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	20	4.7
2010	20	4.6
2015	21	4.7
2020	21	4.8
2025	22	5.0
2030	23	5.1
Percent change 2006-2030	14.0%	8.5%
Annualized change 2006-2030	0.55%	0.34%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	12	2.8
2010	12	2.8
2015	12	2.7
2020	13	2.9
2025	12	2.8
2030	12	2.8
Percent change 2006-2030	2.9%	-2.1%
Annualized change 2006-2030	0.12%	-0.09%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	27	6.3
2010	27	6.2
2015	27	6.3
2020	28	6.4
2025	29	6.5
2030	29	6.6
Percent change 2006-2030	9.1%	3.8%
Annualized change 2006-2030	0.36%	0.15%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	11	2.6
2010	11	2.5
2015	12	2.7
2020	12	2.6
2025	12	2.8
2030	12	2.8
Percent change 2006-2030	12.3%	6.8%
Annualized change 2006-2030	0.48%	0.28%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	7	1.6
2010	7	1.6
2015	7	1.6
2020	8	1.8
2025	8	1.7
2030	8	1.7
Percent change 2006-2030	8.6%	3.3%
Annualized change 2006-2030	0.34%	0.14%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	60	14.1
2010	60	14.1
2015	61	14.0
2020	62	14.1
2025	63	14.3
2030	64	14.2
Percent change 2006-2030	6.1%	0.9%
Annualized change 2006-2030	0.25%	0.04%

Southern Tier Physician Demand Forecasts, 2006 – 2030

Southern Tier Demand Scenario 1: Baseline

Figure 129 – Southern Tier Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,826	253.9
2010	1,832	256.1
2015	1,851	260.3
2020	1,875	266.3
2025	1,904	273.8
2030	1,907	278.6
Percent change 2006-2030	4.4%	9.7%
Annualized change 2006-2030	0.18%	0.39%

Figure 130 – Southern Tier Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	685	95.8	2010	1,147	160.4
2015	691	97.2	2015	1,160	163.1
2020	698	99.1	2020	1,177	167.1
2025	707	101.7	2025	1,197	172.1
2030	707	103.3	2030	1,200	175.3
Percent change 2006-2030	3.2%	8.4%	Percent change 2006-2030	5.2%	10.5%
Annualized change 2006-2030	0.13%	0.34%	Annualized change 2006-2030	0.21%	0.42%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 131 – Southern Tier Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	685	95.8	2010	273	38.2
2015	691	97.2	2015	274	38.5
2020	698	99.1	2020	276	39.2
2025	707	101.7	2025	278	40.0
2030	707	103.3	2030	277	40.5
Percent change 2006-2030	3.2%	8.4%	Percent change 2006-2030	1.8%	7.0%
Annualized change 2006-2030	0.13%	0.34%	Annualized change 2006-2030	0.08%	0.28%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	323	45.2	2010	89	12.4
2015	328	46.1	2015	89	12.5
2020	333	47.3	2020	89	12.6
2025	340	48.9	2025	89	12.8
2030	343	50.1	2030	87	12.7
Percent change 2006-2030	6.9%	12.3%	Percent change 2006-2030	-5.4%	-0.7%
Annualized change 2006-2030	0.28%	0.48%	Annualized change 2006-2030	-0.23%	-0.03%

Non-Primary Care Specialties

Figure 132 – Southern Tier Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	54	7.5
2010	55	7.7
2015	56	7.9
2020	58	8.2
2025	61	8.8
2030	62	9.1
Percent change 2006-2030	14.8%	20.6%
Annualized change 2006-2030	0.58%	0.78%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	150	20.9
2010	151	21.1
2015	154	21.7
2020	158	22.4
2025	161	23.2
2030	163	23.8
Percent change 2006-2030	8.7%	14.2%
Annualized change 2006-2030	0.35%	0.55%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	90	12.5
2010	90	12.6
2015	89	12.5
2020	88	12.5
2025	86	12.4
2030	85	12.4
Percent change 2006-2030	-5.6%	-0.8%
Annualized change 2006-2030	-0.24%	-0.03%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	32	4.4
2010	32	4.5
2015	33	4.6
2020	33	4.7
2025	33	4.7
2030	33	4.8
Percent change 2006-2030	3.1%	8.3%
Annualized change 2006-2030	0.13%	0.33%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	105	14.6
2010	105	14.7
2015	105	14.8
2020	104	14.8
2025	104	15.0
2030	103	15.0
Percent change 2006-2030	-1.9%	3.1%
Annualized change 2006-2030	-0.08%	0.13%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	93	12.9
2010	94	13.1
2015	95	13.4
2020	98	13.9
2025	100	14.4
2030	101	14.8
Percent change 2006-2030	8.6%	14.1%
Annualized change 2006-2030	0.34%	0.55%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	117	16.3
2010	117	16.4
2015	119	16.7
2020	122	17.3
2025	126	18.1
2030	127	18.6
Percent change 2006-2030	8.5%	14.0%
Annualized change 2006-2030	0.34%	0.55%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	89	12.4
2010	89	12.4
2015	89	12.5
2020	89	12.6
2025	89	12.8
2030	88	12.9
Percent change 2006-2030	-1.1%	3.9%
Annualized change 2006-2030	-0.05%	0.16%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	78	10.8
2010	79	11.0
2015	80	11.3
2020	81	11.5
2025	83	11.9
2030	83	12.1
Percent change 2006-2030	6.4%	11.8%
Annualized change 2006-2030	0.26%	0.47%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	46	6.4
2010	46	6.4
2015	47	6.6
2020	49	7.0
2025	51	7.3
2030	51	7.5
Percent change 2006-2030	10.9%	16.5%
Annualized change 2006-2030	0.43%	0.64%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	19	2.7
2025	20	2.9
2030	20	2.9
Percent change 2006-2030	5.3%	10.6%
Annualized change 2006-2030	0.21%	0.42%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	51	7.1
2010	51	7.1
2015	52	7.3
2020	53	7.5
2025	54	7.8
2030	54	7.9
Percent change 2006-2030	5.9%	11.2%
Annualized change 2006-2030	0.24%	0.44%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	28	3.9
2010	28	3.9
2015	29	4.1
2020	30	4.3
2025	31	4.5
2030	31	4.5
Percent change 2006-2030	10.7%	16.3%
Annualized change 2006-2030	0.42%	0.63%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	6.5
2010	48	6.7
2015	49	6.9
2020	49	7.0
2025	50	7.2
2030	50	7.3
Percent change 2006-2030	6.4%	11.8%
Annualized change 2006-2030	0.26%	0.46%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	142	19.7
2010	143	20.0
2015	144	20.3
2020	146	20.7
2025	148	21.3
2030	149	21.8
Percent change 2006-2030	4.9%	10.2%
Annualized change 2006-2030	0.20%	0.41%

Southern Tier Demand Scenario 2: Growing Economy

Figure 133 – Southern Tier Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,826	253.9
2010	1,868	261.1
2015	1,933	271.9
2020	1,981	281.3
2025	2,089	300.3
2030	2,144	313.2
Percent change 2006-2030	17.4%	23.4%
Annualized change 2006-2030	0.67%	0.88%

Figure 134 – Southern Tier Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	693	96.9	2010	1,174	164.2
2015	710	99.8	2015	1,224	172.1
2020	720	102.3	2020	1,260	179.0
2025	748	107.6	2025	1,341	192.8
2030	759	110.9	2030	1,385	202.3
Percent change 2006-2030	10.8%	16.4%	Percent change 2006-2030	21.4%	27.5%
Annualized change 2006-2030	0.43%	0.64%	Annualized change 2006-2030	0.81%	1.02%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 135 – Southern Tier Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	693	96.9	2010	276	38.6
2015	710	99.8	2015	281	39.6
2020	720	102.3	2020	286	40.6
2025	748	107.6	2025	294	42.3
2030	759	110.9	2030	297	43.5
Percent change 2006-2030	10.8%	16.4%	Percent change 2006-2030	9.3%	14.9%
Annualized change 2006-2030	0.43%	0.64%	Annualized change 2006-2030	0.37%	0.58%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	327	45.7	2010	90	12.6
2015	337	47.4	2015	91	12.9
2020	342	48.6	2020	93	13.2
2025	360	51.7	2025	94	13.5
2030	368	53.8	2030	93	13.6
Percent change 2006-2030	14.7%	20.5%	Percent change 2006-2030	1.5%	6.7%
Annualized change 2006-2030	0.57%	0.78%	Annualized change 2006-2030	0.06%	0.27%

Non-Primary Care Specialties

Figure 136 – Southern Tier Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	54	7.5
2010	56	7.9
2015	59	8.3
2020	61	8.7
2025	69	9.9
2030	72	10.6
Percent change 2006-2030	34.1%	40.8%
Annualized change 2006-2030	1.23%	1.44%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	150	20.9
2010	155	21.7
2015	163	23.0
2020	169	23.9
2025	182	26.2
2030	190	27.8
Percent change 2006-2030	26.9%	33.3%
Annualized change 2006-2030	1.00%	1.21%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	90	12.5
2010	91	12.7
2015	91	12.9
2020	93	13.2
2025	91	13.1
2030	91	13.3
Percent change 2006-2030	1.4%	6.5%
Annualized change 2006-2030	0.06%	0.26%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	32	4.4
2010	33	4.6
2015	35	4.9
2020	36	5.1
2025	37	5.4
2030	39	5.6
Percent change 2006-2030	20.4%	26.5%
Annualized change 2006-2030	0.78%	0.98%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	105	14.6
2010	108	15.1
2015	111	15.7
2020	115	16.3
2025	118	16.9
2030	120	17.6
Percent change 2006-2030	14.5%	20.3%
Annualized change 2006-2030	0.57%	0.77%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	93	12.9
2010	96	13.5
2015	101	14.2
2020	104	14.8
2025	113	16.3
2030	118	17.2
Percent change 2006-2030	26.8%	33.2%
Annualized change 2006-2030	0.99%	1.20%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	117	16.3
2010	120	16.8
2015	126	17.7
2020	130	18.5
2025	142	20.5
2030	148	21.7
Percent change 2006-2030	26.8%	33.2%
Annualized change 2006-2030	0.99%	1.20%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	89	12.4
2010	90	12.6
2015	91	12.9
2020	93	13.2
2025	94	13.5
2030	94	13.8
Percent change 2006-2030	6.2%	11.5%
Annualized change 2006-2030	0.25%	0.46%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	78	10.8
2010	81	11.3
2015	85	11.9
2020	88	12.4
2025	94	13.5
2030	97	14.2
Percent change 2006-2030	24.3%	30.5%
Annualized change 2006-2030	0.91%	1.12%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	46	6.4
2010	47	6.6
2015	50	7.0
2020	51	7.3
2025	58	8.3
2030	60	8.7
Percent change 2006-2030	29.5%	36.0%
Annualized change 2006-2030	1.08%	1.29%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	20	2.8
2020	21	3.0
2025	23	3.3
2030	23	3.4
Percent change 2006-2030	22.9%	29.1%
Annualized change 2006-2030	0.86%	1.07%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	51	7.1
2010	52	7.3
2015	55	7.8
2020	57	8.1
2025	61	8.8
2030	63	9.2
Percent change 2006-2030	23.6%	29.9%
Annualized change 2006-2030	0.89%	1.10%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	28	3.9
2010	29	4.0
2015	31	4.3
2020	32	4.5
2025	35	5.0
2030	36	5.3
Percent change 2006-2030	29.3%	35.8%
Annualized change 2006-2030	1.08%	1.28%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	6.5
2010	49	6.9
2015	52	7.3
2020	54	7.6
2025	57	8.1
2030	58	8.5
Percent change 2006-2030	24.2%	30.5%
Annualized change 2006-2030	0.91%	1.12%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	142	19.7
2010	147	20.5
2015	153	21.5
2020	158	22.4
2025	167	24.1
2030	174	25.4
Percent change 2006-2030	22.5%	28.7%
Annualized change 2006-2030	0.85%	1.06%

Southern Tier Demand Scenario 3: Universal Health Insurance by 2020

Figure 137 – Southern Tier Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,826	253.9
2010	1,855	259.4
2015	1,905	267.9
2020	1,961	278.5
2025	1,991	286.4
2030	1,995	291.4
Percent change 2006-2030	9.2%	14.8%
Annualized change 2006-2030	0.37%	0.58%

Figure 138 – Southern Tier Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	694	97.1	2010	1,161	162.3
2015	712	100.2	2015	1,192	167.7
2020	732	104.0	2020	1,229	174.5
2025	742	106.6	2025	1,250	179.7
2030	742	108.3	2030	1,253	183.1
Percent change 2006-2030	8.3%	13.7%	Percent change 2006-2030	9.8%	15.4%
Annualized change 2006-2030	0.33%	0.54%	Annualized change 2006-2030	0.39%	0.60%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 139 – Southern Tier Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	694	97.1	2010	276	38.5
2015	712	100.2	2015	280	39.4
2020	732	104.0	2020	285	40.5
2025	742	106.6	2025	287	41.3
2030	742	108.3	2030	286	41.8
Percent change 2006-2030	8.3%	13.7%	Percent change 2006-2030	5.3%	10.6%
Annualized change 2006-2030	0.33%	0.54%	Annualized change 2006-2030	0.21%	0.42%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	329	45.9	2010	90	12.6
2015	341	47.9	2015	92	12.9
2020	353	50.2	2020	93	13.2
2025	361	51.9	2025	93	13.4
2030	364	53.2	2030	91	13.3
Percent change 2006-2030	13.4%	19.1%	Percent change 2006-2030	-0.9%	4.1%
Annualized change 2006-2030	0.53%	0.73%	Annualized change 2006-2030	-0.04%	0.17%

Non-Primary Care Specialties

Figure 140 – Southern Tier Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	54	7.5
2010	56	7.8
2015	58	8.1
2020	60	8.6
2025	64	9.1
2030	65	9.4
Percent change 2006-2030	19.7%	25.8%
Annualized change 2006-2030	0.75%	0.96%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	150	20.9
2010	153	21.4
2015	160	22.4
2020	167	23.7
2025	170	24.5
2030	172	25.2
Percent change 2006-2030	14.9%	20.7%
Annualized change 2006-2030	0.58%	0.79%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	90	12.5
2010	91	12.8
2015	92	12.9
2020	92	13.1
2025	90	13.0
2030	89	13.0
Percent change 2006-2030	-1.0%	4.0%
Annualized change 2006-2030	-0.04%	0.16%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	32	4.4
2010	33	4.5
2015	34	4.8
2020	35	5.0
2025	35	5.0
2030	35	5.1
Percent change 2006-2030	9.4%	14.9%
Annualized change 2006-2030	0.37%	0.58%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	105	14.6
2010	106	14.9
2015	108	15.2
2020	109	15.5
2025	109	15.7
2030	108	15.8
Percent change 2006-2030	2.8%	8.0%
Annualized change 2006-2030	0.12%	0.32%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	93	12.9
2010	95	13.3
2015	98	13.8
2020	103	14.7
2025	105	15.2
2030	107	15.6
Percent change 2006-2030	14.5%	20.3%
Annualized change 2006-2030	0.57%	0.77%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	117	16.3
2010	119	16.6
2015	124	17.4
2020	129	18.4
2025	134	19.2
2030	135	19.7
Percent change 2006-2030	15.1%	20.9%
Annualized change 2006-2030	0.59%	0.79%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	89	12.4
2010	88	12.3
2015	86	12.1
2020	85	12.0
2025	85	12.2
2030	84	12.2
Percent change 2006-2030	-5.9%	-1.1%
Annualized change 2006-2030	-0.25%	-0.05%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	78	10.8
2010	80	11.2
2015	83	11.6
2020	85	12.1
2025	87	12.6
2030	87	12.8
Percent change 2006-2030	12.2%	17.8%
Annualized change 2006-2030	0.48%	0.69%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	46	6.4
2010	46	6.5
2015	48	6.7
2020	50	7.1
2025	52	7.5
2030	52	7.6
Percent change 2006-2030	13.2%	18.9%
Annualized change 2006-2030	0.52%	0.72%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	19	2.6
2010	19	2.7
2015	19	2.7
2020	20	2.8
2025	21	3.0
2030	21	3.0
Percent change 2006-2030	9.6%	15.1%
Annualized change 2006-2030	0.38%	0.59%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	51	7.1
2010	52	7.3
2015	54	7.6
2020	56	8.0
2025	57	8.3
2030	57	8.4
Percent change 2006-2030	12.6%	18.3%
Annualized change 2006-2030	0.50%	0.70%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	28	3.9
2010	28	4.0
2015	30	4.2
2020	32	4.5
2025	33	4.7
2030	33	4.8
Percent change 2006-2030	16.9%	22.8%
Annualized change 2006-2030	0.65%	0.86%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	6.5
2010	49	6.8
2015	51	7.1
2020	51	7.3
2025	53	7.5
2030	53	7.7
Percent change 2006-2030	11.7%	17.4%
Annualized change 2006-2030	0.46%	0.67%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	142	19.7
2010	145	20.3
2015	148	20.9
2020	153	21.7
2025	155	22.3
2030	156	22.8
Percent change 2006-2030	10.0%	15.5%
Annualized change 2006-2030	0.40%	0.60%

Southern Tier Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

Figure 141 – Southern Tier Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,826	253.9
2010	1,822	254.8
2015	1,829	257.2
2020	1,840	261.3
2025	1,856	266.9
2030	1,847	269.8
Percent change 2006-2030	1.2%	6.3%
Annualized change 2006-2030	0.05%	0.25%

Figure 142 – Southern Tier Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	685	95.3	2006	1,141	158.7
2010	685	95.8	2010	1,137	159.0
2015	691	97.2	2015	1,138	160.0
2020	698	99.1	2020	1,142	162.2
2025	707	101.7	2025	1,149	165.3
2030	707	103.3	2030	1,140	166.5
Percent change 2006-2030	3.2%	8.4%	Percent change 2006-2030	-0.1%	5.0%
Annualized change 2006-2030	0.13%	0.34%	Annualized change 2006-2030	0.00%	0.20%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 143 – Southern Tier Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	685	95.3	2006	272	37.8
2010	685	95.8	2010	273	38.2
2015	691	97.2	2015	274	38.5
2020	698	99.1	2020	276	39.2
2025	707	101.7	2025	278	40.0
2030	707	103.3	2030	277	40.5
Percent change 2006-2030	3.2%	8.4%	Percent change 2006-2030	1.8%	7.0%
Annualized change 2006-2030	0.13%	0.34%	Annualized change 2006-2030	0.08%	0.28%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	321	44.6	2006	92	12.8
2010	323	45.2	2010	89	12.4
2015	328	46.1	2015	89	12.5
2020	333	47.3	2020	89	12.6
2025	340	48.9	2025	89	12.8
2030	343	50.1	2030	87	12.7
Percent change 2006-2030	6.9%	12.3%	Percent change 2006-2030	-5.4%	-0.7%
Annualized change 2006-2030	0.28%	0.48%	Annualized change 2006-2030	-0.23%	-0.03%

Non-Primary Care Specialties

Figure 144 – Southern Tier Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	54	7.5
2010	55	7.6
2015	55	7.7
2020	56	8.0
2025	59	8.4
2030	59	8.6
Percent change 2006-2030	9.1%	14.6%
Annualized change 2006-2030	0.36%	0.57%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	150	20.9
2010	150	20.9
2015	151	21.2
2020	153	21.8
2025	155	22.2
2030	155	22.6
Percent change 2006-2030	3.2%	8.5%
Annualized change 2006-2030	0.13%	0.34%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	90	12.5
2010	89	12.5
2015	87	12.3
2020	85	12.1
2025	83	11.9
2030	81	11.8
Percent change 2006-2030	-10.3%	-5.7%
Annualized change 2006-2030	-0.45%	-0.25%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	32	4.4
2010	32	4.4
2015	32	4.6
2020	32	4.5
2025	32	4.6
2030	31	4.6
Percent change 2006-2030	-2.0%	2.9%
Annualized change 2006-2030	-0.09%	0.12%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	105	14.6
2010	104	14.6
2015	103	14.5
2020	101	14.3
2025	100	14.4
2030	98	14.3
Percent change 2006-2030	-6.8%	-2.1%
Annualized change 2006-2030	-0.29%	-0.09%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	93	12.9
2010	93	13.0
2015	93	13.1
2020	95	13.5
2025	96	13.8
2030	96	14.0
Percent change 2006-2030	3.2%	8.4%
Annualized change 2006-2030	0.13%	0.34%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	117	16.3
2010	116	16.2
2015	117	16.4
2020	118	16.8
2025	121	17.4
2030	121	17.6
Percent change 2006-2030	3.1%	8.3%
Annualized change 2006-2030	0.13%	0.33%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	89	12.4
2010	88	12.3
2015	87	12.3
2020	86	12.3
2025	85	12.3
2030	84	12.2
Percent change 2006-2030	-6.1%	-1.3%
Annualized change 2006-2030	-0.26%	-0.06%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	78	10.8
2010	78	11.0
2015	78	11.0
2020	79	11.2
2025	80	11.5
2030	79	11.5
Percent change 2006-2030	1.1%	6.2%
Annualized change 2006-2030	0.05%	0.25%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	46	6.4
2010	46	6.4
2015	46	6.5
2020	48	6.8
2025	49	7.0
2030	48	7.1
Percent change 2006-2030	5.3%	10.7%
Annualized change 2006-2030	0.22%	0.42%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	19	2.6
2010	19	2.6
2015	19	2.6
2020	18	2.6
2025	19	2.8
2030	19	2.8
Percent change 2006-2030	0.0%	5.1%
Annualized change 2006-2030	0.00%	0.21%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	51	7.1
2010	51	7.1
2015	51	7.2
2020	51	7.3
2025	52	7.5
2030	51	7.5
Percent change 2006-2030	0.6%	5.7%
Annualized change 2006-2030	0.02%	0.23%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	28	3.9
2010	28	3.9
2015	28	4.0
2020	29	4.1
2025	30	4.3
2030	29	4.3
Percent change 2006-2030	5.2%	10.5%
Annualized change 2006-2030	0.21%	0.42%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	47	6.5
2010	48	6.7
2015	48	6.8
2020	48	6.8
2025	48	6.9
2030	48	6.9
Percent change 2006-2030	1.1%	6.2%
Annualized change 2006-2030	0.04%	0.25%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	142	19.7
2010	142	19.8
2015	141	19.9
2020	142	20.1
2025	142	20.4
2030	142	20.7
Percent change 2006-2030	-0.3%	4.7%
Annualized change 2006-2030	-0.01%	0.19%

Western New York Physician Demand Forecasts, 2006 – 2030

Western New York Demand Scenario 1: Baseline

Figure 145 – Western New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,965	279.2
2010	3,922	280.3
2015	3,888	283.3
2020	3,880	288.6
2025	3,886	295.9
2030	3,847	301.2
Percent change 2006-2030	-3.0%	7.9%
Annualized change 2006-2030	-0.13%	0.32%

Figure 146 – Western New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,348	96.3	2010	2,574	184.0
2015	1,332	97.0	2015	2,556	186.2
2020	1,329	98.8	2020	2,551	189.7
2025	1,330	101.3	2025	2,556	194.6
2030	1,318	103.2	2030	2,529	198.0
Percent change 2006-2030	-3.6%	7.2%	Percent change 2006-2030	-2.7%	8.2%
Annualized change 2006-2030	-0.15%	0.29%	Annualized change 2006-2030	-0.11%	0.33%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 147 – Western New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,348	96.3	2010	419	29.9
2015	1,332	97.0	2015	415	30.2
2020	1,329	98.8	2020	414	30.8
2025	1,330	101.3	2025	414	31.5
2030	1,318	103.2	2030	410	32.1
Percent change 2006-2030	-3.6%	7.2%	Percent change 2006-2030	-2.8%	8.0%
Annualized change 2006-2030	-0.15%	0.29%	Annualized change 2006-2030	-0.12%	0.32%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	671	48.0	2010	258	18.4
2015	668	48.7	2015	249	18.1
2020	670	49.8	2020	245	18.2
2025	677	51.6	2025	239	18.2
2030	676	52.9	2030	232	18.2
Percent change 2006-2030	0.1%	11.4%	Percent change 2006-2030	-14.1%	-4.4%
Annualized change 2006-2030	0.01%	0.45%	Annualized change 2006-2030	-0.63%	-0.19%

Non-Primary Care Specialties

Figure 148 – Western New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	118	8.3
2010	118	8.4
2015	119	8.7
2020	121	9.0
2025	125	9.5
2030	125	9.8
Percent change 2006-2030	5.9%	17.8%
Annualized change 2006-2030	0.24%	0.68%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	429	30.2
2010	427	30.5
2015	428	31.2
2020	430	32.0
2025	434	33.0
2030	430	33.7
Percent change 2006-2030	0.2%	11.5%
Annualized change 2006-2030	0.01%	0.45%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	206	14.5
2010	202	14.4
2015	196	14.3
2020	189	14.1
2025	182	13.9
2030	176	13.8
Percent change 2006-2030	-14.6%	-5.0%
Annualized change 2006-2030	-0.65%	-0.21%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	109	7.7
2010	108	7.7
2015	108	7.9
2020	107	8.0
2025	106	8.1
2030	105	8.2
Percent change 2006-2030	-3.7%	7.1%
Annualized change 2006-2030	-0.16%	0.29%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	167	11.8
2010	165	11.8
2015	162	11.8
2020	158	11.8
2025	155	11.8
2030	151	11.8
Percent change 2006-2030	-9.6%	0.5%
Annualized change 2006-2030	-0.42%	0.02%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	192	13.5
2010	190	13.6
2015	189	13.8
2020	191	14.2
2025	194	14.8
2030	193	15.1
Percent change 2006-2030	0.5%	11.8%
Annualized change 2006-2030	0.02%	0.47%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	207	14.6
2010	205	14.7
2015	203	14.8
2020	204	15.2
2025	208	15.8
2030	208	16.3
Percent change 2006-2030	0.5%	11.7%
Annualized change 2006-2030	0.02%	0.46%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	168	11.8
2010	165	11.8
2015	162	11.8
2020	159	11.8
2025	156	11.9
2030	152	11.9
Percent change 2006-2030	-9.5%	0.6%
Annualized change 2006-2030	-0.42%	0.03%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	164	11.5
2010	163	11.7
2015	163	11.9
2020	164	12.2
2025	164	12.5
2030	162	12.7
Percent change 2006-2030	-1.2%	9.8%
Annualized change 2006-2030	-0.05%	0.39%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	99	7.0
2010	98	7.0
2015	98	7.1
2020	100	7.4
2025	102	7.8
2030	102	8.0
Percent change 2006-2030	3.0%	14.6%
Annualized change 2006-2030	0.12%	0.57%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	38	2.7
2010	37	2.6
2015	37	2.7
2020	37	2.8
2025	36	2.7
2030	36	2.8
Percent change 2006-2030	-5.3%	5.3%
Annualized change 2006-2030	-0.23%	0.22%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	129	9.1
2010	128	9.1
2015	127	9.3
2020	127	9.4
2025	128	9.7
2030	128	10.0
Percent change 2006-2030	-0.8%	10.3%
Annualized change 2006-2030	-0.03%	0.41%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	4.4
2010	63	4.5
2015	63	4.6
2020	64	4.8
2025	66	5.0
2030	66	5.2
Percent change 2006-2030	4.8%	16.5%
Annualized change 2006-2030	0.19%	0.64%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	95	6.7
2010	95	6.8
2015	95	6.9
2020	96	7.1
2025	96	7.3
2030	95	7.4
Percent change 2006-2030	0.0%	11.2%
Annualized change 2006-2030	0.00%	0.44%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	414	29.2
2010	410	29.3
2015	406	29.6
2020	404	30.0
2025	404	30.8
2030	400	31.3
Percent change 2006-2030	-3.4%	7.4%
Annualized change 2006-2030	-0.14%	0.30%

Western New York Demand Scenario 2: Growing Economy

Figure 149 – Western New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,965	279.2
2010	4,000	285.9
2015	4,065	296.2
2020	4,160	309.4
2025	4,272	325.3
2030	4,338	339.6
Percent change 2006-2030	9.4%	21.6%
Annualized change 2006-2030	0.37%	0.82%

Figure 150 – Western New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,364	97.5	2010	2,636	188.4
2015	1,368	99.7	2015	2,697	196.5
2020	1,385	103.0	2020	2,774	206.3
2025	1,407	107.1	2025	2,865	218.2
2030	1,415	110.8	2030	2,922	228.8
Percent change 2006-2030	3.5%	15.1%	Percent change 2006-2030	12.5%	25.1%
Annualized change 2006-2030	0.14%	0.59%	Annualized change 2006-2030	0.49%	0.94%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 151 – Western New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,364	97.5	2010	424	30.3
2015	1,368	99.7	2015	426	31.1
2020	1,385	103.0	2020	432	32.1
2025	1,407	107.1	2025	438	33.4
2030	1,415	110.8	2030	440	34.5
Percent change 2006-2030	3.5%	15.1%	Percent change 2006-2030	4.3%	16.0%
Annualized change 2006-2030	0.14%	0.59%	Annualized change 2006-2030	0.18%	0.62%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	679	48.5	2010	261	18.7
2015	686	50.0	2015	256	18.6
2020	698	51.9	2020	255	19.0
2025	716	54.5	2025	253	19.3
2030	726	56.8	2030	249	19.5
Percent change 2006-2030	7.5%	19.6%	Percent change 2006-2030	-7.7%	2.6%
Annualized change 2006-2030	0.30%	0.75%	Annualized change 2006-2030	-0.33%	0.11%

Non-Primary Care Specialties

Figure 152 – Western New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	118	8.3
2010	121	8.7
2015	126	9.2
2020	132	9.9
2025	141	10.8
2030	146	11.4
Percent change 2006-2030	23.7%	37.6%
Annualized change 2006-2030	0.89%	1.34%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	429	30.2
2010	438	31.3
2015	454	33.0
2020	471	35.0
2025	491	37.4
2030	502	39.3
Percent change 2006-2030	17.0%	30.2%
Annualized change 2006-2030	0.66%	1.10%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	206	14.5
2010	204	14.6
2015	201	14.7
2020	197	14.7
2025	193	14.7
2030	189	14.8
Percent change 2006-2030	-8.3%	2.0%
Annualized change 2006-2030	-0.36%	0.08%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	109	7.7
2010	111	7.9
2015	114	8.3
2020	117	8.7
2025	120	9.1
2030	123	9.6
Percent change 2006-2030	12.5%	25.1%
Annualized change 2006-2030	0.49%	0.94%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	167	11.8
2010	169	12.1
2015	172	12.5
2020	173	12.9
2025	175	13.3
2030	176	13.8
Percent change 2006-2030	5.6%	17.4%
Annualized change 2006-2030	0.23%	0.67%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	192	13.5
2010	195	13.9
2015	200	14.6
2020	209	15.6
2025	219	16.7
2030	225	17.6
Percent change 2006-2030	17.4%	30.5%
Annualized change 2006-2030	0.67%	1.12%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	207	14.6
2010	210	15.0
2015	215	15.7
2020	223	16.6
2025	235	17.9
2030	243	19.0
Percent change 2006-2030	17.3%	30.5%
Annualized change 2006-2030	0.67%	1.11%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	168	11.8
2010	167	11.9
2015	166	12.1
2020	166	12.3
2025	165	12.6
2030	163	12.8
Percent change 2006-2030	-2.9%	8.0%
Annualized change 2006-2030	-0.12%	0.32%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	164	11.5
2010	167	12.0
2015	173	12.6
2020	180	13.4
2025	185	14.1
2030	189	14.8
Percent change 2006-2030	15.3%	28.3%
Annualized change 2006-2030	0.60%	1.04%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	99	7.0
2010	101	7.2
2015	104	7.6
2020	109	8.1
2025	115	8.8
2030	119	9.3
Percent change 2006-2030	20.3%	33.8%
Annualized change 2006-2030	0.77%	1.22%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	38	2.7
2010	38	2.7
2015	39	2.9
2020	41	3.0
2025	41	3.1
2030	42	3.3
Percent change 2006-2030	10.6%	23.0%
Annualized change 2006-2030	0.42%	0.87%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	129	9.1
2010	131	9.4
2015	135	9.8
2020	139	10.3
2025	145	11.0
2030	149	11.7
Percent change 2006-2030	15.9%	28.8%
Annualized change 2006-2030	0.62%	1.06%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	4.4
2010	65	4.6
2015	67	4.9
2020	70	5.2
2025	75	5.7
2030	77	6.0
Percent change 2006-2030	22.3%	36.0%
Annualized change 2006-2030	0.84%	1.29%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	95	6.7
2010	97	7.0
2015	101	7.3
2020	105	7.8
2025	109	8.3
2030	111	8.7
Percent change 2006-2030	16.8%	29.9%
Annualized change 2006-2030	0.65%	1.09%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	414	29.2
2010	421	30.1
2015	430	31.3
2020	442	32.9
2025	457	34.8
2030	467	36.6
Percent change 2006-2030	12.8%	25.5%
Annualized change 2006-2030	0.50%	0.95%

Western New York Demand Scenario 3: Universal Health Insurance by 2020

Figure 153 – Western New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,965	279.2
2010	3,974	284.0
2015	4,005	291.8
2020	4,063	302.2
2025	4,070	309.9
2030	4,030	315.5
Percent change 2006-2030	1.6%	13.0%
Annualized change 2006-2030	0.07%	0.51%

Figure 154 – Western New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,367	97.7	2010	2,607	186.3
2015	1,375	100.1	2015	2,630	191.6
2020	1,396	103.8	2020	2,668	198.4
2025	1,397	106.4	2025	2,673	203.5
2030	1,384	108.4	2030	2,645	207.1
Percent change 2006-2030	1.3%	12.6%	Percent change 2006-2030	1.8%	13.2%
Annualized change 2006-2030	0.05%	0.50%	Annualized change 2006-2030	0.08%	0.52%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 155 – Western New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,367	97.7	2010	423	30.2
2015	1,375	100.1	2015	424	30.9
2020	1,396	103.8	2020	428	31.8
2025	1,397	106.4	2025	428	32.6
2030	1,384	108.4	2030	424	33.2
Percent change 2006-2030	1.3%	12.6%	Percent change 2006-2030	0.4%	11.7%
Annualized change 2006-2030	0.05%	0.50%	Annualized change 2006-2030	0.02%	0.46%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	683	48.8	2010	261	18.7
2015	694	50.6	2015	257	18.7
2020	711	52.9	2020	257	19.1
2025	718	54.7	2025	250	19.1
2030	717	56.2	2030	243	19.0
Percent change 2006-2030	6.3%	18.2%	Percent change 2006-2030	-10.0%	0.1%
Annualized change 2006-2030	0.25%	0.70%	Annualized change 2006-2030	-0.44%	0.01%

Non-Primary Care Specialties

Figure 156 – Western New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	118	8.3
2010	119	8.5
2015	122	8.9
2020	126	9.4
2025	130	9.9
2030	130	10.2
Percent change 2006-2030	10.5%	22.8%
Annualized change 2006-2030	0.42%	0.86%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	429	30.2
2010	434	31.0
2015	444	32.3
2020	455	33.8
2025	459	34.9
2030	455	35.6
Percent change 2006-2030	6.0%	17.9%
Annualized change 2006-2030	0.24%	0.69%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	206	14.5
2010	205	14.6
2015	202	14.7
2020	198	14.7
2025	191	14.5
2030	184	14.4
Percent change 2006-2030	-10.4%	-0.4%
Annualized change 2006-2030	-0.46%	-0.02%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	109	7.7
2010	110	7.8
2015	112	8.2
2020	113	8.4
2025	112	8.6
2030	111	8.7
Percent change 2006-2030	2.2%	13.6%
Annualized change 2006-2030	0.09%	0.53%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	167	11.8
2010	167	12.0
2015	167	12.2
2020	166	12.3
2025	162	12.4
2030	158	12.4
Percent change 2006-2030	-5.2%	5.4%
Annualized change 2006-2030	-0.22%	0.22%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	192	13.5
2010	193	13.8
2015	196	14.2
2020	201	15.0
2025	205	15.6
2030	204	15.9
Percent change 2006-2030	6.0%	17.9%
Annualized change 2006-2030	0.24%	0.69%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	207	14.6
2010	208	14.9
2015	211	15.4
2020	216	16.1
2025	221	16.8
2030	221	17.3
Percent change 2006-2030	6.5%	18.5%
Annualized change 2006-2030	0.26%	0.71%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	168	11.8
2010	163	11.6
2015	157	11.4
2020	151	11.3
2025	149	11.3
2030	145	11.3
Percent change 2006-2030	-13.9%	-4.2%
Annualized change 2006-2030	-0.62%	-0.18%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	164	11.5
2010	165	11.8
2015	169	12.3
2020	173	12.9
2025	173	13.2
2030	171	13.4
Percent change 2006-2030	4.1%	15.8%
Annualized change 2006-2030	0.17%	0.61%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	99	7.0
2010	99	7.0
2015	99	7.2
2020	102	7.6
2025	104	7.9
2030	104	8.2
Percent change 2006-2030	5.2%	17.0%
Annualized change 2006-2030	0.21%	0.65%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	38	2.7
2010	37	2.7
2015	38	2.8
2020	39	2.9
2025	37	2.9
2030	37	2.9
Percent change 2006-2030	-1.4%	9.7%
Annualized change 2006-2030	-0.06%	0.39%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	129	9.1
2010	130	9.3
2015	132	9.6
2020	135	10.0
2025	136	10.4
2030	136	10.7
Percent change 2006-2030	5.5%	17.4%
Annualized change 2006-2030	0.23%	0.67%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	4.4
2010	64	4.6
2015	65	4.8
2020	68	5.0
2025	70	5.3
2030	70	5.5
Percent change 2006-2030	10.6%	23.0%
Annualized change 2006-2030	0.42%	0.87%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	95	6.7
2010	96	6.9
2015	98	7.1
2020	101	7.5
2025	101	7.7
2030	100	7.8
Percent change 2006-2030	5.0%	16.8%
Annualized change 2006-2030	0.20%	0.65%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	414	29.2
2010	416	29.7
2015	418	30.5
2020	423	31.5
2025	423	32.2
2030	419	32.8
Percent change 2006-2030	1.3%	12.6%
Annualized change 2006-2030	0.05%	0.50%

Western New York Demand Scenario 4: Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services

Figure 157 – Western New York Physician Demand, 2006 – 2030

Year	Physician Demand	Physician Demand per 100,000 Population
2006	3,965	279.2
2010	3,900	278.7
2015	3,839	279.7
2020	3,805	283.0
2025	3,784	288.2
2030	3,721	291.3
Percent change 2006-2030	-6.2%	4.3%
Annualized change 2006-2030	-0.26%	0.18%

Figure 158 – Western New York Primary Care and Non-Primary Care Physician Demand, 2006 – 2030

Primary Care			Non-Primary Care		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,367	96.3	2006	2,598	182.9
2010	1,348	96.3	2010	2,552	182.4
2015	1,332	97.0	2015	2,507	182.7
2020	1,329	98.8	2020	2,476	184.1
2025	1,330	101.3	2025	2,454	186.9
2030	1,318	103.2	2030	2,403	188.1
Percent change 2006-2030	-3.6%	7.2%	Percent change 2006-2030	-7.5%	2.8%
Annualized change 2006-2030	-0.15%	0.29%	Annualized change 2006-2030	-0.33%	0.12%

Specialty-Specific Demand Forecasts

Primary Care Specialties

Figure 159 – Western New York Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Primary Care			General/Family Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	1,367	96.3	2006	422	29.7
2010	1,348	96.3	2010	419	29.9
2015	1,332	97.0	2015	415	30.2
2020	1,329	98.8	2020	414	30.8
2025	1,330	101.3	2025	414	31.5
2030	1,318	103.2	2030	410	32.1
Percent change 2006-2030	-3.6%	7.2%	Percent change 2006-2030	-2.8%	8.0%
Annualized change 2006-2030	-0.15%	0.29%	Annualized change 2006-2030	-0.12%	0.32%

General Internal Medicine			General Pediatrics		
Year	Physician Demand	Physician Demand per 100,000 Population	Year	Physician Demand	Physician Demand per 100,000 Population
2006	675	47.5	2006	270	19.0
2010	671	48.0	2010	258	18.4
2015	668	48.7	2015	249	18.1
2020	670	49.8	2020	245	18.2
2025	677	51.6	2025	239	18.2
2030	676	52.9	2030	232	18.2
Percent change 2006-2030	0.1%	11.4%	Percent change 2006-2030	-14.1%	-4.4%
Annualized change 2006-2030	0.01%	0.45%	Annualized change 2006-2030	-0.63%	-0.19%

Non-Primary Care Specialties

Figure 160 – Western New York Non-Primary Care Physician Demand: Detailed Specialty Forecasts, 2006 – 2030

Cardiovascular Diseases		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	118	8.3
2010	117	8.4
2015	117	8.5
2020	117	8.7
2025	120	9.1
2030	119	9.3
Percent change 2006-2030	0.6%	11.9%
Annualized change 2006-2030	0.03%	0.47%

Other Internal Medicine Subspecialties		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	429	30.2
2010	423	30.3
2015	420	30.6
2020	417	31.0
2025	417	31.7
2030	409	32.0
Percent change 2006-2030	-4.8%	5.9%
Annualized change 2006-2030	-0.20%	0.24%

Obstetrics and Gynecology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	206	14.5
2010	200	14.3
2015	192	14.0
2020	183	13.6
2025	175	13.3
2030	167	13.1
Percent change 2006-2030	-18.8%	-9.7%
Annualized change 2006-2030	-0.87%	-0.43%

Pathology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	109	7.7
2010	107	7.7
2015	106	7.7
2020	104	7.7
2025	102	7.8
2030	100	7.8
Percent change 2006-2030	-8.5%	1.8%
Annualized change 2006-2030	-0.37%	0.07%

Psychiatry		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	167	11.8
2010	164	11.7
2015	159	11.6
2020	153	11.4
2025	149	11.3
2030	143	11.2
Percent change 2006-2030	-14.1%	-4.5%
Annualized change 2006-2030	-0.63%	-0.19%

Anesthesiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	192	13.5
2010	188	13.5
2015	185	13.5
2020	185	13.8
2025	186	14.2
2030	183	14.4
Percent change 2006-2030	-4.5%	6.2%
Annualized change 2006-2030	-0.19%	0.25%

Radiology		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	207	14.6
2010	203	14.5
2015	199	14.5
2020	198	14.7
2025	200	15.2
2030	198	15.5
Percent change 2006-2030	-4.5%	6.2%
Annualized change 2006-2030	-0.19%	0.25%

Emergency Medicine		
Year	Physician Demand	Physician Demand per 100,000 Population
2006	168	11.8
2010	164	11.7
2015	159	11.6
2020	154	11.5
2025	150	11.4
2030	144	11.3
Percent change 2006-2030	-14.0%	-4.4%
Annualized change 2006-2030	-0.63%	-0.19%

General Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	164	11.5
2010	162	11.6
2015	160	11.6
2020	159	11.8
2025	157	12.0
2030	154	12.1
Percent change 2006-2030	-6.2%	4.4%
Annualized change 2006-2030	-0.26%	0.18%

Ophthalmology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	99	7.0
2010	97	6.9
2015	96	7.0
2020	97	7.2
2025	98	7.5
2030	97	7.6
Percent change 2006-2030	-2.1%	8.8%
Annualized change 2006-2030	-0.09%	0.35%

Otolaryngology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	38	2.7
2010	37	2.6
2015	36	2.6
2020	36	2.7
2025	35	2.6
2030	34	2.7
Percent change 2006-2030	-10.0%	0.1%
Annualized change 2006-2030	-0.44%	0.00%

Orthopedic Surgery

Year	Physician Demand	Physician Demand per 100,000 Population
2006	129	9.1
2010	127	9.1
2015	125	9.1
2020	123	9.2
2025	123	9.4
2030	122	9.5
Percent change 2006-2030	-5.7%	4.8%
Annualized change 2006-2030	-0.25%	0.20%

Urology

Year	Physician Demand	Physician Demand per 100,000 Population
2006	63	4.4
2010	62	4.5
2015	62	4.5
2020	62	4.6
2025	63	4.8
2030	63	4.9
Percent change 2006-2030	-0.5%	10.7%
Annualized change 2006-2030	-0.02%	0.42%

Other Surgical Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	95	6.7
2010	94	6.7
2015	93	6.8
2020	93	6.9
2025	92	7.0
2030	90	7.1
Percent change 2006-2030	-5.0%	5.6%
Annualized change 2006-2030	-0.21%	0.23%

Other Specialties

Year	Physician Demand	Physician Demand per 100,000 Population
2006	414	29.2
2010	407	29.1
2015	398	29.0
2020	392	29.2
2025	388	29.5
2030	380	29.8
Percent change 2006-2030	-8.2%	2.1%
Annualized change 2006-2030	-0.36%	0.09%

Appendix 4: Regional Specialty-Specific Relationship between Physician Supply and Demand

In order to clearly indicate the relationship between the projected physician supply and demand in New York in 2030, in this section, the results of the supply and demand projections are compared in a side-by-side fashion. For each of the three supply scenarios, the projected gap between the growth in the supply of physicians and growth in the demand for physicians is presented in the aggregate and by specialty for each demand scenario.

Gaps between supply and demand under each scenario are presented. The gaps between supply and demand are presented as percentages. These percentages are calculated as follows:

$$[(Supply_{2030} - Demand_{2030}) \div Demand_{2030}] * 100$$

where $Supply_{2030}$ = the number of physicians forecast to be active in 2030; and
 $Demand_{2030}$ = the number of active physicians necessary to meet forecast demand in 2030

For data presented in *tables*, *negative gaps* indicate that demand for physicians in a particular specialty or group of specialties was forecast to grow at a quicker pace than the supply of physicians. *Positive gaps* indicate that the physician supply in a particular specialty or group of specialties was forecast to grow at a quicker pace than the demand for physicians.

Each supply scenario and variation of scenario is compared to each demand scenario in order to evaluate the potential gap between the changes in physician supply and demand through 2030 in each region. Also presented in the tables in this section is the number of physicians that each percentage represents.

Relationship between Physician Supply and Demand in the Capital District 2030

Capital District Supply Scenario 1: Baseline

Figure 1 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
All Physicians	-18	-0.5%	-459	-12.0%	-174	-4.9%	97	3.0%
Supply responsive to demand								
All Physicians	-133	-3.9%	-574	-15.0%	-289	-8.1%	-18	-0.6%

Figure 2 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Primary Care	-30	-2.7%	-110	-9.4%	-82	-7.2%	-30	-2.7%
Non-Primary Care	11	0.5%	-348	-13.1%	-91	-3.8%	127	5.8%
Supply responsive to demand								
Primary Care	-83	-7.6%	-163	-13.9%	-135	-11.8%	-83	-7.6%
Non-Primary Care	-50	-2.2%	-410	-15.4%	-153	-6.4%	65	3.0%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 3 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care (Overall)</i>	-30	-2.7%	-110	-9.4%	-82	-7.2%	-30	-2.7%
<i>General/Family Medicine</i>	-31	-7.1%	-63	-13.5%	-46	-10.1%	-31	-7.1%
<i>General Internal Medicine</i>	-42	-9.1%	-76	-15.4%	-70	-14.4%	-42	-9.1%
<i>General Pediatrics</i>	43	21.8%	29	13.5%	34	16.3%	43	21.8%
Supply responsive to demand								
<i>Primary Care (Overall)</i>	-83	-7.6%	-163	-13.9%	-135	-11.8%	-83	-7.6%
<i>General/Family Medicine</i>	-46	-10.5%	-78	-16.7%	-61	-13.5%	-46	-10.5%
<i>General Internal Medicine</i>	-61	-13.4%	-95	-19.3%	-89	-18.4%	-61	-13.4%
<i>General Pediatrics</i>	24	12.4%	10	4.6%	15	7.2%	24	12.4%

Non-Primary Care Specialties

Figure 4 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Cardiology	3	2.6%	-18	-12.2%	-2	-1.7%	10	8.0%
Other Internal Medicine Subspecialties	89	21.9%	21	4.4%	65	15.3%	109	28.4%
Obstetrics and Gynecology	15	11.7%	6	4.0%	9	6.6%	21	17.6%
Pathology	-29	-32.6%	-44	-42.3%	-34	-36.5%	-25	-29.1%
Supply responsive to demand								
Cardiology	4	3.1%	-18	-11.7%	-2	-1.2%	10	8.5%
Other Internal Medicine Subspecialties	79	19.5%	11	2.4%	56	13.0%	99	25.8%
Obstetrics and Gynecology	5	4.2%	-4	-3.0%	-1	-0.6%	12	9.7%
Pathology	-30	-34.1%	-45	-43.6%	-36	-37.9%	-26	-30.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Psychiatry	-33	-17.2%	-66	-29.1%	-43	-21.1%	-24	-12.9%
Anesthesiology	-10	-5.9%	-37	-19.4%	-18	-10.8%	-1	-1.0%
Radiology	3	1.5%	-29	-13.1%	-9	-4.3%	12	6.9%
Emergency Medicine	85	54.2%	73	43.6%	92	62.0%	92	62.3%
Supply responsive to demand								
Psychiatry	-43	-22.5%	-76	-33.6%	-53	-26.1%	-34	-18.4%
Anesthesiology	-11	-6.8%	-38	-20.2%	-20	-11.6%	-3	-1.9%
Radiology	1	0.4%	-31	-14.0%	-11	-5.3%	10	5.7%
Emergency Medicine	75	48.1%	63	37.9%	82	55.5%	83	55.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
General Surgery	4	3.2%	-16	-11.6%	-3	-2.1%	10	8.7%
Ophthalmology	-40	-33.2%	-59	-42.8%	-42	-34.6%	-34	-29.7%
Otolaryngology	-5	-13.6%	-11	-26.0%	-7	-17.1%	-3	-9.1%
Orthopedic Surgery	-3	-3.3%	-21	-17.2%	-10	-9.1%	2	1.8%
Supply responsive to demand								
General Surgery	0	-0.1%	-20	-14.4%	-6	-5.2%	6	5.2%
Ophthalmology	-41	-34.1%	-60	-43.5%	-43	-35.4%	-35	-30.6%
Otolaryngology	-6	-15.4%	-12	-27.6%	-7	-18.8%	-4	-11.0%
Orthopedic Surgery	-5	-5.1%	-23	-18.8%	-12	-10.8%	0	-0.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Urology	-21	-32.7%	-32	-42.4%	-24	-36.3%	-18	-29.2%
Other Surgical Subspecialties	-23	-24.5%	-38	-35.3%	-27	-28.1%	-18	-20.5%
Other Supecialties	-23	-7.3%	-77	-20.6%	-39	-11.5%	-7	-2.4%
Supply responsive to demand								
Urology	-22	-33.6%	-32	-43.2%	-25	-37.1%	-18	-30.1%
Other Surgical Subspecialties	-24	-26.6%	-40	-37.1%	-29	-30.1%	-20	-22.7%
Other Specialties	-32	-10.0%	-86	-22.9%	-47	-14.1%	-16	-5.3%

Capital District Supply Scenario 2: NP/PA High and Lower Growth

Figure 5 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	357	10.5%	-84	-2.2%	201	5.7%	472	14.4%
NP/PA Lower Growth								
<i>All Physicians</i>	160	4.7%	-280	-7.3%	5	0.1%	275	8.4%
Supply responsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	229	6.7%	-212	-5.5%	74	2.1%	344	10.5%
NP/PA Lower Growth								
<i>All Physicians</i>	40	1.2%	-400	-10.4%	-115	-3.2%	155	4.7%

Figure 6 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care	162	14.9%	82	7.0%	110	9.6%	162	14.9%
Non-Primary Care	194	8.4%	-166	-6.2%	91	3.8%	309	14.1%
NP/PA Lower Growth								
Primary Care	70	6.4%	-11	-0.9%	17	1.5%	70	6.4%
Non-Primary Care	91	3.9%	-269	-10.1%	-12	-0.5%	206	9.4%
Supply responsive to demand								
NP/PA High Growth								
Primary Care	86	7.9%	5	0.5%	34	2.9%	86	7.9%
Non-Primary Care	143	6.2%	-217	-8.1%	40	1.7%	258	11.8%
NP/PA Lower Growth								
Primary Care	-1	-0.1%	-82	-7.0%	-54	-4.7%	-1	-0.1%
Non-Primary Care	41	1.8%	-318	-12.0%	-62	-2.6%	157	7.2%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 7 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030,
 Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care (Overall)	162	14.9%	82	7.0%	110	9.6%	162	14.9%
General/Family Medicine	42	9.7%	10	2.2%	28	6.1%	42	9.7%
General Internal Medicine	33	7.3%	0	-0.1%	5	1.1%	33	7.3%
General Pediatrics	86	43.9%	72	34.0%	77	37.3%	86	43.9%
NP/PA Lower Growth								
Primary Care (Overall)	70	6.4%	-11	-0.9%	17	1.5%	70	6.4%
General/Family Medicine	7	1.6%	-25	-5.4%	-8	-1.7%	7	1.6%
General Internal Medicine	-3	-0.7%	-37	-7.5%	-31	-6.4%	-3	-0.7%
General Pediatrics	65	33.2%	51	24.1%	56	27.2%	65	33.2%
Supply responsive to demand								
NP/PA High Growth								
Primary Care (Overall)	86	7.9%	5	0.5%	34	2.9%	86	7.9%
General/Family Medicine	19	4.4%	-13	-2.8%	5	1.0%	19	4.4%
General Internal Medicine	5	1.1%	-29	-5.8%	-23	-4.7%	5	1.1%
General Pediatrics	61	31.2%	47	22.2%	52	25.2%	61	31.2%
NP/PA Lower Growth								
Primary Care (Overall)	-1	-0.1%	-82	-7.0%	-54	-4.7%	-1	-0.1%
General/Family Medicine	-14	-3.3%	-46	-9.9%	-29	-6.5%	-14	-3.3%
General Internal Medicine	-29	-6.4%	-63	-12.8%	-57	-11.8%	-29	-6.4%
General Pediatrics	42	21.5%	28	13.1%	33	15.9%	42	21.5%

Non-Primary Care Specialties

Figure 8 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Cardiology	14	10.7%	-8	-5.2%	8	6.1%	20	16.5%
Other Internal Medicine Subspecialties	128	31.6%	60	12.7%	104	24.4%	148	38.5%
Obstetrics and Gynecology	26	20.5%	17	12.3%	20	15.0%	32	26.9%
Pathology	-24	-27.3%	-39	-37.7%	-30	-31.5%	-20	-23.5%
NP/PA Lower Growth								
Cardiology	8	6.1%	-14	-9.2%	2	1.7%	14	11.6%
Other Internal Medicine Subspecialties	105	26.1%	38	8.0%	82	19.3%	126	32.7%
Obstetrics and Gynecology	20	15.5%	10	7.6%	14	10.2%	26	21.6%
Pathology	-27	-30.3%	-42	-40.3%	-32	-34.3%	-23	-26.7%
Supply responsive to demand								
NP/PA High Growth								
Cardiology	15	11.9%	-6	-4.2%	10	7.3%	22	17.8%
Other Internal Medicine Subspecialties	120	29.8%	53	11.1%	97	22.7%	141	36.6%
Obstetrics and Gynecology	17	13.1%	7	5.4%	11	7.9%	23	19.1%
Pathology	-25	-28.5%	-40	-38.8%	-31	-32.6%	-21	-24.7%
NP/PA Lower Growth								
Cardiology	9	7.3%	-12	-8.2%	4	2.8%	16	12.9%
Other Internal Medicine Subspecialties	99	24.4%	31	6.5%	75	17.7%	119	31.0%
Obstetrics and Gynecology	11	8.4%	1	1.0%	5	3.5%	17	14.1%
Pathology	-28	-31.5%	-43	-41.3%	-33	-35.4%	-24	-27.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Psychiatry	-21	-10.7%	-53	-23.5%	-30	-14.8%	-11	-6.0%
Anesthesiology	2	1.5%	-25	-13.1%	-6	-3.8%	10	6.8%
Radiology	18	9.5%	-14	-6.2%	7	3.3%	28	15.3%
Emergency Medicine	104	66.4%	92	55.0%	111	74.8%	111	75.2%
NP/PA Lower Growth								
Psychiatry	-28	-14.4%	-60	-26.7%	-37	-18.4%	-18	-9.9%
Anesthesiology	-4	-2.7%	-31	-16.7%	-13	-7.7%	4	2.4%
Radiology	10	5.0%	-22	-10.1%	-2	-1.0%	19	10.5%
Emergency Medicine	93	59.5%	81	48.5%	100	67.5%	101	67.9%
Supply responsive to demand								
NP/PA High Growth								
Psychiatry	-31	-15.8%	-63	-27.9%	-40	-19.7%	-21	-11.4%
Anesthesiology	2	1.2%	-25	-13.4%	-7	-4.1%	10	6.5%
Radiology	17	9.0%	-15	-6.6%	6	2.8%	27	14.8%
Emergency Medicine	95	60.8%	83	49.7%	102	68.9%	103	69.2%
NP/PA Lower Growth								
Psychiatry	-37	-19.3%	-70	-30.9%	-47	-23.0%	-28	-15.1%
Anesthesiology	-5	-3.0%	-32	-16.9%	-14	-8.0%	3	2.1%
Radiology	9	4.5%	-23	-10.5%	-3	-1.4%	18	10.0%
Emergency Medicine	84	54.1%	73	43.5%	92	61.9%	92	62.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
General Surgery	13	11.4%	-6	-4.6%	7	5.7%	19	17.2%
Ophthalmology	-33	-28.0%	-53	-38.3%	-36	-29.4%	-27	-24.2%
Otolaryngology	-3	-6.8%	-9	-20.2%	-4	-10.5%	-1	-1.9%
Orthopedic Surgery	5	4.4%	-13	-10.6%	-2	-1.9%	10	9.9%
NP/PA Lower Growth								
General Surgery	8	6.8%	-12	-8.6%	2	1.3%	14	12.4%
Ophthalmology	-37	-30.9%	-57	-40.9%	-39	-32.3%	-31	-27.3%
Otolaryngology	-4	-10.7%	-10	-23.5%	-5	-14.2%	-2	-6.0%
Orthopedic Surgery	0	0.0%	-18	-14.3%	-7	-6.0%	5	5.3%
Supply responsive to demand								
NP/PA High Growth								
General Surgery	10	8.5%	-10	-7.1%	4	3.0%	16	14.2%
Ophthalmology	-34	-28.4%	-54	-38.7%	-36	-29.8%	-28	-24.6%
Otolaryngology	-3	-8.2%	-9	-21.4%	-5	-11.8%	-1	-3.3%
Orthopedic Surgery	3	3.0%	-14	-11.8%	-4	-3.2%	8	8.4%
NP/PA Lower Growth								
General Surgery	5	4.0%	-15	-10.9%	-2	-1.3%	11	9.5%
Ophthalmology	-37	-31.4%	-57	-41.2%	-40	-32.8%	-31	-27.8%
Otolaryngology	-4	-12.0%	-11	-24.6%	-6	-15.4%	-3	-7.3%
Orthopedic Surgery	-1	-1.3%	-19	-15.4%	-8	-7.2%	4	3.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Urology	-18	-27.4%	-28	-37.8%	-21	-31.2%	-14	-23.6%
Other Surgical Subspecialties	-17	-18.5%	-32	-30.2%	-22	-22.4%	-12	-14.2%
Other Specialties	0	0.0%	-54	-14.3%	-15	-4.6%	16	5.3%
NP/PA Lower Growth								
Urology	-19	-30.4%	-30	-40.4%	-23	-34.1%	-16	-26.8%
Other Surgical Subspecialties	-20	-21.9%	-36	-33.1%	-25	-25.6%	-16	-17.8%
Other Specialties	-13	-4.1%	-67	-17.9%	-29	-8.5%	3	0.9%
Supply responsive to demand								
NP/PA High Growth								
Urology	-18	-27.9%	-29	-38.3%	-21	-31.7%	-15	-24.1%
Other Surgical Subspecialties	-19	-20.3%	-34	-31.7%	-23	-24.1%	-14	-16.1%
Other Specialties	-7	-2.3%	-61	-16.3%	-23	-6.8%	9	2.9%
NP/PA Lower Growth								
Urology	-20	-30.9%	-31	-40.8%	-23	-34.6%	-17	-27.3%
Other Surgical Subspecialties	-22	-23.6%	-37	-34.6%	-26	-27.2%	-17	-19.6%
Other Specialties	-20	-6.3%	-74	-19.8%	-36	-10.6%	-4	-1.4%

Capital District Supply Scenario 3a: Increased Retention of Physicians

Figure 9 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	63	1.9%	-377	-9.8%	-92	-2.6%	178	5.4%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	63	1.9%	-377	-9.8%	-92	-2.6%	178	5.4%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	63	1.9%	-377	-9.8%	-92	-2.6%	178	5.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-55	-1.6%	-495	-12.9%	-210	-5.9%	61	1.8%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-55	-1.6%	-495	-12.9%	-210	-5.9%	61	1.8%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-55	-1.6%	-495	-12.9%	-210	-5.9%	61	1.8%

Figure 10 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-3	-0.2%	-83	-7.1%	-55	-4.8%	-3	-0.2%
Non-Primary Care	66	2.9%	-294	-11.0%	-37	-1.5%	181	8.3%
25% Primary Care/75% Non-Primary Care								
Primary Care	-9	-0.9%	-90	-7.7%	-62	-5.4%	-9	-0.9%
Non-Primary Care	73	3.1%	-287	-10.8%	-30	-1.3%	188	8.6%
20% Primary Care/80% Non-Primary Care								
Primary Care	-13	-1.2%	-94	-8.0%	-66	-5.8%	-13	-1.2%
Non-Primary Care	77	3.3%	-283	-10.6%	-26	-1.1%	192	8.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-57	-5.2%	-137	-11.7%	-109	-9.5%	-57	-5.2%
Non-Primary Care	2	0.1%	-358	-13.4%	-101	-4.2%	117	5.4%
25% Primary Care/75% Non-Primary Care								
Primary Care	-63	-5.8%	-144	-12.3%	-115	-10.1%	-63	-5.8%
Non-Primary Care	9	0.4%	-351	-13.2%	-94	-3.9%	124	5.7%
20% Primary Care/80% Non-Primary Care								
Primary Care	-67	-6.2%	-148	-12.6%	-119	-10.4%	-67	-6.2%
Non-Primary Care	12	0.5%	-347	-13.0%	-90	-3.8%	128	5.8%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 11 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-3	-0.2%	-83	-7.1%	-55	-4.8%	-3	-0.2%
General/Family Medicine	-20	-4.7%	-53	-11.3%	-35	-7.8%	-20	-4.7%
General Internal Medicine	-31	-6.8%	-65	-13.2%	-59	-12.2%	-31	-6.8%
General Pediatrics	49	25.0%	35	16.4%	40	19.3%	49	25.0%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-9	-0.9%	-90	-7.7%	-62	-5.4%	-9	-0.9%
General/Family Medicine	-23	-5.3%	-55	-11.8%	-38	-8.4%	-23	-5.3%
General Internal Medicine	-34	-7.4%	-68	-13.8%	-62	-12.8%	-34	-7.4%
General Pediatrics	48	24.2%	33	15.7%	38	18.5%	48	24.2%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-13	-1.2%	-94	-8.0%	-66	-5.8%	-13	-1.2%
General/Family Medicine	-25	-5.7%	-57	-12.1%	-39	-8.7%	-25	-5.7%
General Internal Medicine	-36	-7.8%	-69	-14.1%	-64	-13.1%	-36	-7.8%
General Pediatrics	47	23.7%	32	15.2%	37	18.1%	47	23.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-57	-5.2%	-137	-11.7%	-109	-9.5%	-57	-5.2%
General/Family Medicine	-36	-8.2%	-68	-14.5%	-50	-11.2%	-36	-8.2%
General Internal Medicine	-51	-11.1%	-85	-17.2%	-79	-16.3%	-51	-11.1%
General Pediatrics	30	15.3%	16	7.4%	21	10.0%	30	15.3%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-63	-5.8%	-144	-12.3%	-115	-10.1%	-63	-5.8%
General/Family Medicine	-38	-8.8%	-70	-15.1%	-53	-11.8%	-38	-8.8%
General Internal Medicine	-54	-11.7%	-87	-17.7%	-82	-16.8%	-54	-11.7%
General Pediatrics	29	14.6%	14	6.7%	19	9.3%	29	14.6%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-67	-6.2%	-148	-12.6%	-119	-10.4%	-67	-6.2%
General/Family Medicine	-40	-9.1%	-72	-15.4%	-55	-12.1%	-40	-9.1%
General Internal Medicine	-55	-12.0%	-89	-18.1%	-83	-17.1%	-55	-12.0%
General Pediatrics	28	14.1%	13	6.3%	18	8.9%	28	14.1%

Non-Primary Care Specialties

Figure 12 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	6	5.0%	-15	-10.1%	1	0.6%	13	10.5%
Other Internal Medicine Subspecialties	100	24.8%	32	6.9%	77	18.0%	120	31.4%
Obstetrics and Gynecology	18	14.3%	9	6.5%	12	9.1%	25	20.3%
Pathology	-28	-31.0%	-43	-41.0%	-33	-35.0%	-23	-27.4%
25% Primary Care/75% Non-Primary Care								
Cardiology	7	5.3%	-15	-9.9%	1	0.9%	13	10.8%
Other Internal Medicine Subspecialties	102	25.2%	34	7.2%	78	18.4%	122	31.7%
Obstetrics and Gynecology	19	14.7%	9	6.8%	12	9.4%	25	20.7%
Pathology	-27	-30.9%	-42	-40.8%	-33	-34.8%	-23	-27.2%
20% Primary Care/80% Non-Primary Care								
Cardiology	7	5.4%	-15	-9.7%	1	1.1%	13	11.0%
Other Internal Medicine Subspecialties	102	25.4%	35	7.4%	79	18.6%	123	32.0%
Obstetrics and Gynecology	19	14.9%	9	7.0%	13	9.6%	25	20.9%
Pathology	-27	-30.7%	-42	-40.7%	-33	-34.7%	-23	-27.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	7	5.5%	-15	-9.7%	2	1.1%	13	11.0%
Other Internal Medicine Subspecialties	90	22.3%	22	4.7%	67	15.7%	110	28.8%
Obstetrics and Gynecology	8	6.6%	-1	-0.7%	2	1.7%	15	12.2%
Pathology	-29	-32.6%	-44	-42.3%	-34	-36.5%	-25	-29.1%
25% Primary Care/75% Non-Primary Care								
Cardiology	7	5.7%	-14	-9.4%	2	1.4%	14	11.3%
Other Internal Medicine Subspecialties	92	22.7%	24	5.0%	68	16.0%	112	29.1%
Obstetrics and Gynecology	9	6.9%	-1	-0.4%	3	2.0%	15	12.5%
Pathology	-29	-32.4%	-44	-42.1%	-34	-36.3%	-24	-28.9%
20% Primary Care/80% Non-Primary Care								
Cardiology	8	5.9%	-14	-9.3%	2	1.6%	14	11.5%
Other Internal Medicine Subspecialties	92	22.9%	25	5.2%	69	16.2%	113	29.3%
Obstetrics and Gynecology	9	7.1%	0	-0.3%	3	2.2%	15	12.7%
Pathology	-29	-32.3%	-44	-42.0%	-34	-36.2%	-24	-28.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-30	-15.3%	-62	-27.5%	-39	-19.2%	-20	-10.8%
Anesthesiology	-6	-3.7%	-33	-17.5%	-15	-8.7%	2	1.4%
Radiology	7	3.9%	-25	-11.0%	-4	-2.0%	17	9.4%
Emergency Medicine	90	57.8%	79	47.0%	98	65.8%	98	66.1%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-29	-15.1%	-61	-27.3%	-38	-19.0%	-19	-10.6%
Anesthesiology	-6	-3.4%	-33	-17.3%	-14	-8.4%	3	1.6%
Radiology	8	4.2%	-24	-10.8%	-4	-1.7%	18	9.7%
Emergency Medicine	91	58.3%	79	47.4%	98	66.3%	99	66.6%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-29	-14.9%	-61	-27.1%	-38	-18.8%	-19	-10.4%
Anesthesiology	-5	-3.3%	-32	-17.2%	-14	-8.3%	3	1.8%
Radiology	8	4.4%	-24	-10.6%	-3	-1.6%	18	9.9%
Emergency Medicine	91	58.6%	80	47.7%	99	66.5%	99	66.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-40	-20.7%	-72	-32.1%	-49	-24.3%	-30	-16.5%
Anesthesiology	-7	-4.6%	-34	-18.3%	-16	-9.6%	1	0.4%
Radiology	5	2.8%	-27	-12.0%	-6	-3.1%	15	8.2%
Emergency Medicine	80	51.5%	69	41.1%	88	59.2%	88	59.5%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-39	-20.5%	-72	-31.9%	-49	-24.1%	-30	-16.3%
Anesthesiology	-7	-4.4%	-34	-18.1%	-16	-9.3%	1	0.7%
Radiology	6	3.1%	-26	-11.7%	-6	-2.8%	15	8.5%
Emergency Medicine	81	52.0%	70	41.5%	89	59.6%	89	59.9%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-39	-20.3%	-72	-31.8%	-49	-24.0%	-30	-16.1%
Anesthesiology	-7	-4.2%	-34	-18.0%	-16	-9.2%	1	0.8%
Radiology	6	3.2%	-26	-11.6%	-5	-2.6%	16	8.7%
Emergency Medicine	81	52.2%	70	41.8%	89	59.9%	89	60.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	7	5.7%	-13	-9.5%	0	0.2%	12	11.2%
Ophthalmology	-38	-31.7%	-58	-41.5%	-40	-33.1%	-32	-28.1%
Otolaryngology	-4	-11.6%	-11	-24.3%	-6	-15.1%	-2	-7.0%
Orthopedic Surgery	-1	-1.0%	-19	-15.2%	-8	-6.9%	4	4.2%
25% Primary Care/75% Non-Primary Care								
General Surgery	7	6.0%	-13	-9.3%	1	0.5%	13	11.5%
Ophthalmology	-37	-31.5%	-57	-41.3%	-40	-32.9%	-31	-27.9%
Otolaryngology	-4	-11.4%	-10	-24.1%	-6	-14.9%	-2	-6.7%
Orthopedic Surgery	-1	-0.7%	-18	-15.0%	-7	-6.7%	4	4.5%
20% Primary Care/80% Non-Primary Care								
General Surgery	7	6.1%	-12	-9.1%	1	0.7%	13	11.7%
Ophthalmology	-37	-31.3%	-57	-41.2%	-40	-32.7%	-31	-27.7%
Otolaryngology	-4	-11.2%	-10	-24.0%	-6	-14.7%	-2	-6.5%
Orthopedic Surgery	-1	-0.6%	-18	-14.8%	-7	-6.5%	5	4.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	3	2.3%	-17	-12.4%	-4	-3.0%	9	7.7%
Ophthalmology	-39	-32.5%	-59	-42.2%	-41	-33.9%	-33	-29.0%
Otolaryngology	-5	-13.5%	-11	-25.9%	-6	-16.9%	-3	-8.9%
Orthopedic Surgery	-3	-2.9%	-21	-16.9%	-10	-8.7%	2	2.2%
25% Primary Care/75% Non-Primary Care								
General Surgery	3	2.6%	-17	-12.2%	-3	-2.7%	9	8.0%
Ophthalmology	-38	-32.3%	-58	-42.0%	-41	-33.7%	-33	-28.8%
Otolaryngology	-5	-13.2%	-11	-25.7%	-6	-16.6%	-3	-8.6%
Orthopedic Surgery	-3	-2.7%	-20	-16.6%	-9	-8.5%	2	2.5%
20% Primary Care/80% Non-Primary Care								
General Surgery	3	2.7%	-16	-12.0%	-3	-2.5%	9	8.1%
Ophthalmology	-38	-32.2%	-58	-41.9%	-41	-33.6%	-32	-28.6%
Otolaryngology	-5	-13.1%	-11	-25.5%	-6	-16.5%	-3	-8.5%
Orthopedic Surgery	-3	-2.5%	-20	-16.5%	-9	-8.3%	3	2.6%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-20	-31.1%	-31	-41.0%	-23	-34.8%	-17	-27.5%
Other Surgical Subspecialties	-21	-22.7%	-36	-33.8%	-25	-26.4%	-16	-18.6%
Other Specialties	-16	-5.1%	-70	-18.7%	-32	-9.5%	0	-0.1%
25% Primary Care/75% Non-Primary Care								
Urology	-20	-31.0%	-31	-40.9%	-23	-34.6%	-17	-27.3%
Other Surgical Subspecialties	-21	-22.5%	-36	-33.6%	-25	-26.2%	-16	-18.4%
Other Specialties	-15	-4.8%	-69	-18.5%	-31	-9.2%	1	0.2%
20% Primary Care/80% Non-Primary Care								
Urology	-20	-30.8%	-30	-40.8%	-23	-34.5%	-17	-27.2%
Other Surgical Subspecialties	-21	-22.3%	-36	-33.5%	-25	-26.0%	-16	-18.3%
Other Specialties	-15	-4.7%	-69	-18.4%	-30	-9.0%	1	0.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-21	-32.1%	-31	-41.8%	-24	-35.7%	-17	-28.5%
Other Surgical Subspecialties	-23	-24.9%	-38	-35.7%	-27	-28.4%	-18	-20.9%
Other Specialties	-25	-7.9%	-79	-21.1%	-41	-12.1%	-9	-3.1%
25% Primary Care/75% Non-Primary Care								
Urology	-20	-31.9%	-31	-41.7%	-24	-35.5%	-17	-28.3%
Other Surgical Subspecialties	-23	-24.7%	-38	-35.5%	-27	-28.2%	-18	-20.7%
Other Specialties	-24	-7.6%	-78	-20.9%	-40	-11.9%	-8	-2.8%
20% Primary Care/80% Non-Primary Care								
Urology	-20	-31.8%	-31	-41.6%	-24	-35.4%	-17	-28.2%
Other Surgical Subspecialties	-23	-24.5%	-38	-35.4%	-27	-28.1%	-18	-20.6%
Other Specialties	-24	-7.5%	-78	-20.8%	-39	-11.7%	-8	-2.6%

Capital District Supply Scenario 3b: Decreased Retention of Physicians

Figure 13 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-100	-2.9%	-540	-14.1%	-255	-7.2%	16	0.5%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-100	-2.9%	-540	-14.1%	-255	-7.2%	16	0.5%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-100	-2.9%	-540	-14.1%	-255	-7.2%	16	0.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-212	-6.2%	-652	-17.0%	-367	-10.3%	-97	-3.0%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-212	-6.2%	-652	-17.0%	-367	-10.3%	-97	-3.0%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-212	-6.2%	-652	-17.0%	-367	-10.3%	-97	-3.0%

Figure 14 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-57	-5.2%	-137	-11.7%	-109	-9.5%	-57	-5.2%
Non-Primary Care	-43	-1.9%	-403	-15.1%	-146	-6.1%	72	3.3%
25% Primary Care/75% Non-Primary Care								
Primary Care	-50	-4.6%	-131	-11.1%	-102	-9.0%	-50	-4.6%
Non-Primary Care	-50	-2.2%	-409	-15.4%	-153	-6.3%	66	3.0%
20% Primary Care/80% Non-Primary Care								
Primary Care	-46	-4.2%	-126	-10.8%	-98	-8.6%	-46	-4.2%
Non-Primary Care	-54	-2.3%	-413	-15.5%	-157	-6.5%	62	2.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-109	-10.0%	-190	-16.2%	-161	-14.1%	-109	-10.0%
Non-Primary Care	-103	-4.5%	-463	-17.4%	-206	-8.6%	12	0.6%
25% Primary Care/75% Non-Primary Care								
Primary Care	-103	-9.4%	-183	-15.6%	-155	-13.5%	-103	-9.4%
Non-Primary Care	-109	-4.7%	-469	-17.6%	-212	-8.8%	6	0.3%
20% Primary Care/80% Non-Primary Care								
Primary Care	-99	-9.0%	-179	-15.3%	-151	-13.2%	-99	-9.0%
Non-Primary Care	-113	-4.9%	-473	-17.8%	-216	-9.0%	2	0.1%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 15 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-57	-5.2%	-137	-11.7%	-109	-9.5%	-57	-5.2%
General/Family Medicine	-41	-9.5%	-73	-15.7%	-56	-12.4%	-41	-9.5%
General Internal Medicine	-53	-11.5%	-86	-17.5%	-81	-16.6%	-53	-11.5%
General Pediatrics	37	18.7%	22	10.6%	27	13.3%	37	18.7%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-50	-4.6%	-131	-11.1%	-102	-9.0%	-50	-4.6%
General/Family Medicine	-39	-8.9%	-71	-15.1%	-53	-11.8%	-39	-8.9%
General Internal Medicine	-50	-10.9%	-84	-17.0%	-78	-16.0%	-50	-10.9%
General Pediatrics	38	19.5%	24	11.3%	29	14.1%	38	19.5%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-46	-4.2%	-126	-10.8%	-98	-8.6%	-46	-4.2%
General/Family Medicine	-37	-8.5%	-69	-14.8%	-52	-11.5%	-37	-8.5%
General Internal Medicine	-48	-10.5%	-82	-16.7%	-77	-15.7%	-48	-10.5%
General Pediatrics	39	20.0%	25	11.7%	30	14.5%	39	20.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-109	-10.0%	-190	-16.2%	-161	-14.1%	-109	-10.0%
General/Family Medicine	-56	-12.9%	-88	-18.9%	-71	-15.7%	-56	-12.9%
General Internal Medicine	-72	-15.6%	-106	-21.4%	-100	-20.5%	-72	-15.6%
General Pediatrics	19	9.4%	4	1.9%	9	4.5%	19	9.4%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-103	-9.4%	-183	-15.6%	-155	-13.5%	-103	-9.4%
General/Family Medicine	-53	-12.3%	-86	-18.3%	-68	-15.2%	-53	-12.3%
General Internal Medicine	-69	-15.1%	-103	-20.9%	-97	-20.0%	-69	-15.1%
General Pediatrics	20	10.2%	6	2.6%	11	5.1%	20	10.2%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-99	-9.0%	-179	-15.3%	-151	-13.2%	-99	-9.0%
General/Family Medicine	-52	-11.9%	-84	-18.0%	-67	-14.8%	-52	-11.9%
General Internal Medicine	-68	-14.7%	-101	-20.6%	-96	-19.6%	-68	-14.7%
General Pediatrics	21	10.6%	6	3.0%	11	5.6%	21	10.6%

Non-Primary Care Specialties

Figure 16 – Projected Difference Between Physician Supply and Demand in the Capital District in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	0	0.2%	-21	-14.2%	-5	-4.0%	7	5.4%
Other Internal Medicine Subspecialties	77	19.1%	9	2.0%	54	12.6%	97	25.3%
Obstetrics and Gynecology	12	9.1%	2	1.6%	5	4.1%	18	14.8%
Pathology	-30	-34.2%	-45	-43.7%	-36	-38.0%	-26	-30.7%
25% Primary Care/75% Non-Primary Care								
Cardiology	0	-0.1%	-22	-14.5%	-6	-4.2%	6	5.1%
Other Internal Medicine Subspecialties	76	18.7%	8	1.7%	52	12.3%	96	25.0%
Obstetrics and Gynecology	11	8.8%	2	1.3%	5	3.8%	17	14.5%
Pathology	-31	-34.4%	-46	-43.8%	-36	-38.2%	-26	-30.9%
20% Primary Care/80% Non-Primary Care								
Cardiology	0	-0.3%	-22	-14.6%	-6	-4.4%	6	4.9%
Other Internal Medicine Subspecialties	75	18.5%	7	1.5%	52	12.1%	95	24.7%
Obstetrics and Gynecology	11	8.6%	2	1.1%	5	3.6%	17	14.3%
Pathology	-31	-34.5%	-46	-43.9%	-36	-38.3%	-26	-31.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	1	0.7%	-21	-13.8%	-5	-3.5%	7	6.0%
Other Internal Medicine Subspecialties	68	16.7%	0	0.0%	44	10.4%	88	22.9%
Obstetrics and Gynecology	2	1.8%	-7	-5.2%	-4	-2.9%	9	7.1%
Pathology	-32	-35.7%	-47	-44.9%	-37	-39.4%	-27	-32.3%
25% Primary Care/75% Non-Primary Care								
Cardiology	0	0.4%	-21	-14.1%	-5	-3.8%	7	5.6%
Other Internal Medicine Subspecialties	66	16.4%	-1	-0.3%	43	10.1%	86	22.5%
Obstetrics and Gynecology	2	1.5%	-8	-5.5%	-4	-3.2%	8	6.8%
Pathology	-32	-35.9%	-47	-45.1%	-37	-39.5%	-27	-32.5%
20% Primary Care/80% Non-Primary Care								
Cardiology	0	0.2%	-21	-14.2%	-5	-3.9%	7	5.4%
Other Internal Medicine Subspecialties	65	16.2%	-2	-0.5%	42	9.9%	86	22.3%
Obstetrics and Gynecology	2	1.3%	-8	-5.7%	-4	-3.4%	8	6.6%
Pathology	-32	-36.0%	-47	-45.2%	-37	-39.6%	-28	-32.6%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-37	-19.2%	-69	-30.8%	-46	-22.9%	-27	-14.9%
Anesthesiology	-13	-8.1%	-40	-21.3%	-22	-12.9%	-5	-3.3%
Radiology	-2	-0.9%	-34	-15.1%	-13	-6.5%	8	4.4%
Emergency Medicine	79	50.6%	67	40.3%	86	58.2%	87	58.5%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-37	-19.4%	-70	-31.0%	-47	-23.1%	-28	-15.2%
Anesthesiology	-14	-8.4%	-41	-21.6%	-22	-13.1%	-5	-3.6%
Radiology	-2	-1.2%	-34	-15.3%	-14	-6.8%	7	4.0%
Emergency Medicine	78	50.2%	67	39.8%	86	57.7%	86	58.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-38	-19.6%	-70	-31.1%	-47	-23.3%	-28	-15.3%
Anesthesiology	-14	-8.6%	-41	-21.7%	-23	-13.3%	-6	-3.8%
Radiology	-3	-1.3%	-35	-15.5%	-14	-6.9%	7	3.9%
Emergency Medicine	78	49.9%	66	39.6%	85	57.4%	86	57.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-47	-24.3%	-79	-35.2%	-56	-27.8%	-37	-20.3%
Anesthesiology	-14	-9.0%	-41	-22.1%	-23	-13.7%	-6	-4.2%
Radiology	-4	-1.9%	-36	-16.0%	-15	-7.5%	6	3.2%
Emergency Medicine	70	44.6%	58	34.7%	77	51.9%	77	52.2%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-47	-24.5%	-80	-35.4%	-57	-28.0%	-38	-20.5%
Anesthesiology	-15	-9.3%	-42	-22.3%	-24	-14.0%	-7	-4.5%
Radiology	-4	-2.2%	-36	-16.3%	-16	-7.8%	5	2.9%
Emergency Medicine	69	44.2%	57	34.3%	76	51.5%	77	51.8%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-48	-24.7%	-80	-35.5%	-57	-28.1%	-38	-20.7%
Anesthesiology	-15	-9.4%	-42	-22.4%	-24	-14.1%	-7	-4.6%
Radiology	-5	-2.4%	-37	-16.4%	-16	-7.9%	5	2.8%
Emergency Medicine	69	43.9%	57	34.1%	76	51.2%	76	51.5%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	1	0.8%	-19	-13.7%	-5	-4.4%	7	6.1%
Ophthalmology	-41	-34.8%	-61	-44.2%	-44	-36.1%	-35	-31.4%
Otolaryngology	-6	-15.7%	-12	-27.8%	-7	-19.0%	-4	-11.2%
Orthopedic Surgery	-6	-5.5%	-23	-19.1%	-13	-11.2%	-1	-0.6%
25% Primary Care/75% Non-Primary Care								
General Surgery	1	0.5%	-19	-13.9%	-6	-4.6%	6	5.8%
Ophthalmology	-42	-35.0%	-62	-44.3%	-44	-36.3%	-36	-31.6%
Otolaryngology	-6	-15.9%	-12	-28.0%	-7	-19.2%	-4	-11.5%
Orthopedic Surgery	-6	-5.8%	-24	-19.4%	-13	-11.5%	-1	-0.9%
20% Primary Care/80% Non-Primary Care								
General Surgery	0	0.3%	-19	-14.1%	-6	-4.8%	6	5.6%
Ophthalmology	-42	-35.1%	-62	-44.4%	-44	-36.4%	-36	-31.7%
Otolaryngology	-6	-16.1%	-12	-28.1%	-7	-19.4%	-4	-11.7%
Orthopedic Surgery	-6	-6.0%	-24	-19.5%	-13	-11.6%	-1	-1.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-3	-2.4%	-22	-16.4%	-9	-7.4%	3	2.8%
Ophthalmology	-42	-35.6%	-62	-44.8%	-45	-36.9%	-36	-32.2%
Otolaryngology	-6	-17.4%	-13	-29.3%	-8	-20.7%	-5	-13.0%
Orthopedic Surgery	-8	-7.3%	-25	-20.7%	-14	-12.9%	-2	-2.5%
25% Primary Care/75% Non-Primary Care								
General Surgery	-3	-2.7%	-23	-16.7%	-9	-7.7%	3	2.4%
Ophthalmology	-43	-35.8%	-63	-45.0%	-45	-37.1%	-37	-32.4%
Otolaryngology	-7	-17.6%	-13	-29.5%	-8	-20.9%	-5	-13.3%
Orthopedic Surgery	-8	-7.6%	-26	-20.9%	-15	-13.1%	-3	-2.8%
20% Primary Care/80% Non-Primary Care								
General Surgery	-3	-2.8%	-23	-16.8%	-10	-7.8%	3	2.3%
Ophthalmology	-43	-35.9%	-63	-45.1%	-45	-37.2%	-37	-32.5%
Otolaryngology	-7	-17.8%	-13	-29.6%	-8	-21.0%	-5	-13.5%
Orthopedic Surgery	-8	-7.8%	-26	-21.0%	-15	-13.3%	-3	-2.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-22	-34.3%	-33	-43.7%	-26	-37.8%	-19	-30.8%
Other Surgical Subspecialties	-24	-26.2%	-40	-36.8%	-29	-29.8%	-20	-22.4%
Other Specialties	-30	-9.4%	-84	-22.5%	-46	-13.6%	-14	-4.7%
25% Primary Care/75% Non-Primary Care								
Urology	-22	-34.5%	-33	-43.9%	-26	-37.9%	-19	-31.0%
Other Surgical Subspecialties	-24	-26.5%	-40	-37.0%	-29	-30.0%	-20	-22.6%
Other Specialties	-31	-9.7%	-85	-22.7%	-47	-13.9%	-15	-5.0%
20% Primary Care/80% Non-Primary Care								
Urology	-22	-34.6%	-33	-44.0%	-26	-38.1%	-19	-31.2%
Other Surgical Subspecialties	-24	-26.6%	-40	-37.1%	-29	-30.1%	-20	-22.7%
Other Specialties	-32	-9.9%	-85	-22.8%	-47	-14.0%	-16	-5.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-23	-35.2%	-33	-44.5%	-26	-38.6%	-19	-31.8%
Other Surgical Subspecialties	-26	-28.3%	-41	-38.6%	-31	-31.7%	-21	-24.5%
Other Specialties	-39	-12.1%	-92	-24.7%	-54	-16.1%	-23	-7.5%
25% Primary Care/75% Non-Primary Care								
Urology	-23	-35.4%	-33	-44.7%	-26	-38.8%	-19	-32.0%
Other Surgical Subspecialties	-26	-28.5%	-42	-38.8%	-31	-31.9%	-22	-24.7%
Other Specialties	-40	-12.4%	-93	-24.9%	-55	-16.4%	-24	-7.7%
20% Primary Care/80% Non-Primary Care								
Urology	-23	-35.5%	-33	-44.8%	-26	-38.9%	-20	-32.1%
Other Surgical Subspecialties	-26	-28.6%	-42	-38.9%	-31	-32.0%	-22	-24.9%
Other Specialties	-40	-12.5%	-94	-25.1%	-55	-16.5%	-24	-7.9%

Relationship between Physician Supply and Demand in Central New York 2030

Central New York Supply Scenario 1: Baseline

Figure 1 – Projected Difference Between Physician Supply and Demand in Central New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
All Physicians	256	11.6%	-34	-1.4%	155	6.7%	334	15.7%
Supply responsive to demand								
All Physicians	-74	-3.4%	-365	-14.6%	-176	-7.6%	4	0.2%

Figure 2 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Primary Care	38	5.9%	-10	-1.4%	7	1.1%	38	5.9%
Non-Primary Care	218	14.0%	-25	-1.4%	147	9.0%	296	20.0%
Supply responsive to demand								
Primary Care	-44	-6.8%	-92	-13.2%	-75	-11.0%	-44	-6.8%
Non-Primary Care	-30	-1.9%	-273	-15.1%	-101	-6.2%	48	3.2%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 3 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care (Overall)</i>	38	5.9%	-10	-1.4%	7	1.1%	38	5.9%
<i>General/Family Medicine</i>	-1	-0.4%	-20	-7.2%	-10	-3.7%	-1	-0.4%
<i>General Internal Medicine</i>	2	0.8%	-17	-6.2%	-14	-5.1%	2	0.8%
<i>General Pediatrics</i>	37	26.9%	27	18.2%	31	21.1%	37	26.9%
Supply responsive to demand								
<i>Primary Care (Overall)</i>	-44	-6.8%	-92	-13.2%	-75	-11.0%	-44	-6.8%
<i>General/Family Medicine</i>	-27	-10.5%	-46	-16.7%	-35	-13.5%	-27	-10.5%
<i>General Internal Medicine</i>	-34	-13.4%	-54	-19.3%	-50	-18.4%	-34	-13.4%
<i>General Pediatrics</i>	17	12.4%	7	4.6%	11	7.2%	17	12.4%

Non-Primary Care Specialties

Figure 4 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Cardiology	15	19.2%	2	2.1%	12	14.3%	19	25.5%
Other Internal Medicine Subspecialties	104	40.3%	61	20.1%	89	32.7%	117	47.7%
Obstetrics and Gynecology	22	21.9%	15	13.5%	17	16.3%	27	28.3%
Pathology	-16	-23.9%	-26	-34.8%	-19	-28.2%	-12	-19.9%
Supply responsive to demand								
Cardiology	2	3.1%	-11	-11.7%	-1	-1.2%	6	8.5%
Other Internal Medicine Subspecialties	50	19.5%	7	2.4%	36	13.0%	63	25.8%
Obstetrics and Gynecology	4	4.2%	-3	-3.0%	-1	-0.6%	9	9.7%
Pathology	-22	-34.1%	-33	-43.6%	-26	-37.9%	-19	-30.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Psychiatry	-8	-6.8%	-27	-20.2%	-13	-11.1%	-2	-1.9%
Anesthesiology	8	6.6%	-11	-8.7%	1	1.1%	13	12.3%
Radiology	20	15.3%	-2	-1.3%	12	8.7%	26	21.3%
Emergency Medicine	73	71.1%	65	59.4%	77	79.7%	78	80.1%
Supply responsive to demand								
Psychiatry	-26	-22.5%	-45	-33.6%	-31	-26.1%	-20	-18.4%
Anesthesiology	-8	-6.8%	-27	-20.2%	-14	-11.6%	-2	-1.9%
Radiology	1	0.4%	-21	-14.0%	-7	-5.3%	7	5.7%
Emergency Medicine	49	48.1%	42	37.9%	54	55.5%	54	55.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
General Surgery	17	16.2%	-1	-0.5%	12	10.2%	23	22.3%
Ophthalmology	-15	-24.0%	-26	-34.9%	-17	-25.5%	-12	-20.0%
Otolaryngology	-1	-1.6%	-8	-15.7%	-2	-5.4%	1	3.6%
Orthopedic Surgery	7	7.9%	-8	-7.6%	1	1.4%	11	13.6%
Supply responsive to demand								
General Surgery	0	-0.1%	-18	-14.4%	-6	-5.2%	5	5.2%
Ophthalmology	-22	-34.1%	-33	-43.5%	-23	-35.4%	-19	-30.6%
Otolaryngology	-6	-15.4%	-14	-27.6%	-8	-18.8%	-4	-11.0%
Orthopedic Surgery	-5	-5.1%	-19	-18.8%	-10	-10.8%	0	-0.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Urology	-8	-23.3%	-14	-34.3%	-10	-27.3%	-7	-19.2%
Other Surgical Subspecialties	-9	-14.6%	-19	-26.8%	-12	-18.6%	-6	-10.1%
Other Supecialties	10	4.8%	-24	-10.3%	0	0.0%	20	10.3%
Supply responsive to demand								
Urology	-12	-33.6%	-18	-43.2%	-14	-37.1%	-10	-30.1%
Other Surgical Subspecialties	-16	-26.6%	-26	-37.1%	-19	-30.1%	-13	-22.7%
Other Specialties	-20	-10.0%	-54	-22.9%	-30	-14.1%	-10	-5.3%

Central New York Supply Scenario 2: NP/PA High and Lower Growth

Figure 5 – Projected Difference Between Physician Supply and Demand in Central New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	518	23.4%	227	9.1%	416	18.0%	596	27.9%
NP/PA Lower Growth								
<i>All Physicians</i>	378	17.1%	88	3.5%	276	12.0%	456	21.4%
Supply responsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	158	7.2%	-132	-5.3%	57	2.4%	236	11.1%
NP/PA Lower Growth								
<i>All Physicians</i>	37	1.7%	-253	-10.1%	-65	-2.8%	115	5.4%

Figure 6 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care	161	24.7%	113	16.1%	130	19.0%	161	24.7%
Non-Primary Care	357	22.9%	114	6.3%	286	17.6%	435	29.4%
NP/PA Lower Growth								
Primary Care	101	15.5%	53	7.5%	70	10.2%	101	15.5%
Non-Primary Care	277	17.8%	35	1.9%	207	12.7%	355	24.0%
Supply responsive to demand								
NP/PA High Growth								
Primary Care	57	8.8%	9	1.4%	26	3.9%	57	8.8%
Non-Primary Care	101	6.5%	-142	-7.9%	30	1.9%	179	12.1%
NP/PA Lower Growth								
Primary Care	5	0.8%	-43	-6.2%	-26	-3.8%	5	0.8%
Non-Primary Care	32	2.1%	-210	-11.7%	-39	-2.4%	110	7.4%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 7 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care (Overall)	161	24.7%	113	16.1%	130	19.0%	161	24.7%
General/Family Medicine	44	17.3%	25	9.2%	35	13.5%	44	17.3%
General Internal Medicine	48	18.7%	29	10.5%	32	11.8%	48	18.7%
General Pediatrics	69	49.5%	58	39.2%	62	42.6%	69	49.5%
NP/PA Lower Growth								
Primary Care (Overall)	101	15.5%	53	7.5%	70	10.2%	101	15.5%
General/Family Medicine	22	8.6%	3	1.2%	13	5.1%	22	8.6%
General Internal Medicine	26	9.9%	6	2.3%	10	3.5%	26	9.9%
General Pediatrics	53	38.4%	43	28.9%	47	32.1%	53	38.4%
Supply responsive to demand								
NP/PA High Growth								
Primary Care (Overall)	57	8.8%	9	1.4%	26	3.9%	57	8.8%
General/Family Medicine	11	4.4%	-8	-2.8%	3	1.0%	11	4.4%
General Internal Medicine	3	1.1%	-16	-5.8%	-13	-4.7%	3	1.1%
General Pediatrics	43	31.2%	33	22.2%	37	25.2%	43	31.2%
NP/PA Lower Growth								
Primary Care (Overall)	5	0.8%	-43	-6.2%	-26	-3.8%	5	0.8%
General/Family Medicine	-8	-3.3%	-27	-9.9%	-17	-6.5%	-8	-3.3%
General Internal Medicine	-16	-6.4%	-35	-12.8%	-32	-11.8%	-16	-6.4%
General Pediatrics	30	21.5%	20	13.1%	23	15.9%	30	21.5%

Non-Primary Care Specialties

Figure 8 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Cardiology	22	28.6%	9	10.1%	19	23.3%	26	35.3%
Other Internal Medicine Subspecialties	132	51.3%	89	29.5%	117	43.0%	145	59.2%
Obstetrics and Gynecology	31	31.4%	24	22.4%	27	25.4%	36	38.4%
Pathology	-12	-17.9%	-23	-29.7%	-16	-22.6%	-8	-13.6%
NP/PA Lower Growth								
Cardiology	18	23.2%	5	5.5%	15	18.2%	22	29.7%
Other Internal Medicine Subspecialties	116	45.0%	73	24.2%	101	37.1%	129	52.6%
Obstetrics and Gynecology	26	26.0%	19	17.3%	21	20.2%	31	32.6%
Pathology	-14	-21.4%	-25	-32.6%	-18	-25.8%	-11	-17.2%
Supply responsive to demand								
NP/PA High Growth								
Cardiology	9	11.9%	-4	-4.2%	6	7.3%	13	17.8%
Other Internal Medicine Subspecialties	77	29.8%	34	11.1%	62	22.7%	90	36.6%
Obstetrics and Gynecology	13	13.1%	6	5.4%	8	7.9%	18	19.1%
Pathology	-19	-28.5%	-29	-38.8%	-22	-32.6%	-15	-24.7%
NP/PA Lower Growth								
Cardiology	6	7.3%	-7	-8.2%	2	2.8%	10	12.9%
Other Internal Medicine Subspecialties	63	24.4%	20	6.5%	48	17.7%	76	31.0%
Obstetrics and Gynecology	8	8.4%	1	1.0%	4	3.5%	13	14.1%
Pathology	-20	-31.5%	-31	-41.3%	-24	-35.4%	-17	-27.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Psychiatry	0	0.4%	-19	-14.0%	-5	-4.2%	6	5.7%
Anesthesiology	17	15.0%	-2	-1.5%	11	9.0%	23	21.0%
Radiology	31	24.3%	10	6.4%	24	17.2%	38	30.8%
Emergency Medicine	86	84.5%	79	71.8%	91	93.8%	91	94.2%
NP/PA Lower Growth								
Psychiatry	-4	-3.7%	-23	-17.6%	-10	-8.2%	1	1.3%
Anesthesiology	12	10.2%	-7	-5.6%	5	4.5%	17	16.0%
Radiology	25	19.1%	3	2.0%	17	12.3%	31	25.4%
Emergency Medicine	78	76.8%	71	64.7%	83	85.7%	83	86.2%
Supply responsive to demand								
NP/PA High Growth								
Psychiatry	-18	-15.8%	-37	-27.9%	-24	-19.7%	-12	-11.4%
Anesthesiology	1	1.2%	-18	-13.4%	-5	-4.1%	7	6.5%
Radiology	12	9.0%	-10	-6.6%	4	2.8%	18	14.8%
Emergency Medicine	62	60.8%	54	49.7%	67	68.9%	67	69.2%
NP/PA Lower Growth								
Psychiatry	-22	-19.3%	-41	-30.9%	-28	-23.0%	-16	-15.1%
Anesthesiology	-3	-3.0%	-22	-16.9%	-10	-8.0%	2	2.1%
Radiology	6	4.5%	-16	-10.5%	-2	-1.4%	12	10.0%
Emergency Medicine	55	54.1%	48	43.5%	60	61.9%	60	62.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
General Surgery	27	25.2%	9	7.3%	21	18.8%	32	31.8%
Ophthalmology	-12	-18.0%	-22	-29.8%	-13	-19.7%	-8	-13.7%
Otolaryngology	3	6.1%	-4	-9.1%	1	2.0%	5	11.7%
Orthopedic Surgery	15	16.3%	0	-0.4%	9	9.4%	19	22.5%
NP/PA Lower Growth								
General Surgery	21	20.1%	4	2.8%	16	13.9%	27	26.4%
Ophthalmology	-14	-21.4%	-24	-32.7%	-15	-23.0%	-11	-17.3%
Otolaryngology	1	1.7%	-6	-12.9%	-1	-2.3%	3	7.1%
Orthopedic Surgery	10	11.5%	-5	-4.5%	5	4.8%	15	17.4%
Supply responsive to demand								
NP/PA High Growth								
General Surgery	9	8.5%	-9	-7.1%	3	3.0%	14	14.2%
Ophthalmology	-18	-28.4%	-29	-38.7%	-19	-29.8%	-15	-24.6%
Otolaryngology	-3	-8.2%	-10	-21.4%	-5	-11.8%	-1	-3.3%
Orthopedic Surgery	3	3.0%	-12	-11.8%	-3	-3.2%	7	8.4%
NP/PA Lower Growth								
General Surgery	4	4.0%	-14	-10.9%	-1	-1.3%	10	9.5%
Ophthalmology	-20	-31.4%	-31	-41.2%	-21	-32.8%	-17	-27.8%
Otolaryngology	-5	-12.0%	-12	-24.6%	-7	-15.4%	-3	-7.3%
Orthopedic Surgery	-1	-1.3%	-16	-15.4%	-7	-7.2%	3	3.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Urology	-6	-17.3%	-12	-29.2%	-8	-21.6%	-4	-12.9%
Other Surgical Subspecialties	-5	-7.9%	-15	-21.1%	-8	-12.3%	-2	-3.0%
Other Specialties	26	13.0%	-8	-3.3%	16	7.8%	36	18.9%
NP/PA Lower Growth								
Urology	-7	-20.7%	-13	-32.1%	-9	-24.9%	-6	-16.5%
Other Surgical Subspecialties	-7	-11.7%	-17	-24.4%	-10	-15.9%	-4	-7.1%
Other Specialties	17	8.3%	-17	-7.3%	7	3.3%	27	14.0%
Supply responsive to demand								
NP/PA High Growth								
Urology	-10	-27.9%	-16	-38.3%	-12	-31.7%	-8	-24.1%
Other Surgical Subspecialties	-12	-20.3%	-23	-31.7%	-15	-24.1%	-9	-16.1%
Other Specialties	-5	-2.3%	-38	-16.3%	-14	-6.8%	5	2.9%
NP/PA Lower Growth								
Urology	-11	-30.9%	-17	-40.8%	-13	-34.6%	-9	-27.3%
Other Surgical Subspecialties	-14	-23.6%	-25	-34.6%	-17	-27.2%	-11	-19.6%
Other Specialties	-13	-6.3%	-46	-19.8%	-22	-10.6%	-3	-1.4%

Central New York Supply Scenario 3a: Increased Retention of Physicians

Figure 9 – Projected Difference Between Physician Supply and Demand in Central New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	315	14.3%	25	1.0%	214	9.2%	393	18.5%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	315	14.3%	25	1.0%	214	9.2%	393	18.5%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	315	14.3%	25	1.0%	214	9.2%	393	18.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-23	-1.0%	-313	-12.5%	-125	-5.4%	55	2.6%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-23	-1.0%	-313	-12.5%	-125	-5.4%	55	2.6%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-23	-1.0%	-313	-12.5%	-125	-5.4%	55	2.6%

Figure 10 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	58	8.9%	10	1.4%	27	4.0%	58	8.9%
Non-Primary Care	257	16.5%	15	0.8%	187	11.5%	335	22.6%
25% Primary Care/75% Non-Primary Care								
Primary Care	53	8.2%	5	0.7%	22	3.2%	53	8.2%
Non-Primary Care	262	16.8%	20	1.1%	192	11.8%	340	23.0%
20% Primary Care/80% Non-Primary Care								
Primary Care	50	7.7%	2	0.3%	19	2.8%	50	7.7%
Non-Primary Care	265	17.0%	23	1.3%	195	11.9%	343	23.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-27	-4.1%	-75	-10.7%	-58	-8.5%	-27	-4.1%
Non-Primary Care	4	0.3%	-238	-13.2%	-67	-4.1%	82	5.5%
25% Primary Care/75% Non-Primary Care								
Primary Care	-31	-4.8%	-79	-11.3%	-62	-9.1%	-31	-4.8%
Non-Primary Care	8	0.5%	-234	-13.0%	-62	-3.8%	86	5.8%
20% Primary Care/80% Non-Primary Care								
Primary Care	-34	-5.2%	-82	-11.7%	-65	-9.5%	-34	-5.2%
Non-Primary Care	11	0.7%	-232	-12.9%	-60	-3.7%	89	6.0%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 11 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	58	8.9%	10	1.4%	27	4.0%	58	8.9%
General/Family Medicine	6	2.4%	-13	-4.6%	-2	-0.9%	6	2.4%
General Internal Medicine	9	3.6%	-10	-3.5%	-6	-2.3%	9	3.6%
General Pediatrics	42	30.5%	32	21.6%	36	24.6%	42	30.5%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	53	8.2%	5	0.7%	22	3.2%	53	8.2%
General/Family Medicine	4	1.7%	-14	-5.2%	-4	-1.6%	4	1.7%
General Internal Medicine	8	2.9%	-11	-4.1%	-8	-3.0%	8	2.9%
General Pediatrics	41	29.6%	31	20.7%	35	23.7%	41	29.6%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	50	7.7%	2	0.3%	19	2.8%	50	7.7%
General/Family Medicine	3	1.3%	-15	-5.6%	-5	-2.0%	3	1.3%
General Internal Medicine	6	2.5%	-13	-4.5%	-9	-3.4%	6	2.5%
General Pediatrics	40	29.1%	30	20.2%	34	23.2%	40	29.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-27	-4.1%	-75	-10.7%	-58	-8.5%	-27	-4.1%
General/Family Medicine	-20	-8.0%	-39	-14.3%	-29	-11.0%	-20	-8.0%
General Internal Medicine	-28	-10.9%	-47	-17.0%	-44	-16.1%	-28	-10.9%
General Pediatrics	22	15.5%	11	7.6%	15	10.3%	22	15.5%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-31	-4.8%	-79	-11.3%	-62	-9.1%	-31	-4.8%
General/Family Medicine	-22	-8.6%	-41	-14.9%	-31	-11.6%	-22	-8.6%
General Internal Medicine	-30	-11.5%	-49	-17.6%	-46	-16.6%	-30	-11.5%
General Pediatrics	21	14.7%	10	6.9%	14	9.5%	21	14.7%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-34	-5.2%	-82	-11.7%	-65	-9.5%	-34	-5.2%
General/Family Medicine	-23	-9.0%	-42	-15.3%	-32	-12.0%	-23	-9.0%
General Internal Medicine	-31	-11.9%	-50	-18.0%	-47	-17.0%	-31	-11.9%
General Pediatrics	20	14.3%	10	6.4%	13	9.1%	20	14.3%

Non-Primary Care Specialties

Figure 12 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	17	21.9%	4	4.4%	14	16.9%	21	28.3%
Other Internal Medicine Subspecialties	112	43.4%	69	22.8%	97	35.6%	125	50.9%
Obstetrics and Gynecology	25	24.6%	17	16.1%	20	18.9%	30	31.2%
Pathology	-14	-22.2%	-25	-33.4%	-18	-26.6%	-11	-18.1%
25% Primary Care/75% Non-Primary Care								
Cardiology	17	22.2%	4	4.7%	14	17.2%	21	28.6%
Other Internal Medicine Subspecialties	113	43.8%	70	23.1%	98	36.0%	126	51.4%
Obstetrics and Gynecology	25	25.0%	18	16.4%	20	19.2%	30	31.5%
Pathology	-14	-22.0%	-25	-33.2%	-18	-26.5%	-11	-17.9%
20% Primary Care/80% Non-Primary Care								
Cardiology	17	22.4%	4	4.8%	14	17.4%	21	28.9%
Other Internal Medicine Subspecialties	114	44.0%	70	23.3%	99	36.2%	126	51.6%
Obstetrics and Gynecology	25	25.2%	18	16.6%	20	19.4%	30	31.7%
Pathology	-14	-21.9%	-25	-33.1%	-18	-26.3%	-11	-17.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	4	5.4%	-9	-9.8%	1	1.0%	8	10.9%
Other Internal Medicine Subspecialties	57	22.2%	14	4.7%	43	15.6%	70	28.6%
Obstetrics and Gynecology	7	6.5%	-1	-0.8%	2	1.6%	12	12.1%
Pathology	-21	-32.7%	-32	-42.3%	-25	-36.5%	-18	-29.1%
25% Primary Care/75% Non-Primary Care								
Cardiology	4	5.7%	-9	-9.5%	1	1.3%	8	11.2%
Other Internal Medicine Subspecialties	58	22.6%	15	4.9%	43	15.9%	71	29.0%
Obstetrics and Gynecology	7	6.8%	-1	-0.5%	2	1.9%	12	12.4%
Pathology	-21	-32.5%	-32	-42.2%	-25	-36.3%	-18	-28.9%
20% Primary Care/80% Non-Primary Care								
Cardiology	5	5.8%	-9	-9.4%	1	1.5%	8	11.4%
Other Internal Medicine Subspecialties	59	22.8%	15	5.1%	44	16.1%	72	29.2%
Obstetrics and Gynecology	7	7.0%	0	-0.3%	2	2.1%	12	12.6%
Pathology	-21	-32.4%	-32	-42.1%	-25	-36.2%	-18	-28.8%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-5	-4.8%	-25	-18.5%	-11	-9.2%	0	0.2%
Anesthesiology	10	9.0%	-9	-6.6%	4	3.4%	16	14.8%
Radiology	23	17.8%	1	0.9%	15	11.1%	29	24.0%
Emergency Medicine	76	74.9%	69	62.9%	81	83.7%	82	84.1%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-5	-4.5%	-24	-18.2%	-11	-8.9%	1	0.5%
Anesthesiology	11	9.3%	-8	-6.4%	4	3.6%	16	15.1%
Radiology	23	18.2%	2	1.2%	16	11.4%	30	24.4%
Emergency Medicine	77	75.4%	69	63.3%	82	84.2%	82	84.6%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-5	-4.4%	-24	-18.1%	-10	-8.8%	1	0.7%
Anesthesiology	11	9.5%	-8	-6.2%	5	3.8%	16	15.2%
Radiology	24	18.3%	2	1.3%	16	11.6%	30	24.6%
Emergency Medicine	77	75.7%	70	63.6%	82	84.5%	82	84.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-24	-20.7%	-43	-32.1%	-29	-24.4%	-18	-16.6%
Anesthesiology	-5	-4.7%	-24	-18.4%	-12	-9.7%	0	0.3%
Radiology	3	2.7%	-18	-12.1%	-4	-3.2%	10	8.1%
Emergency Medicine	52	51.4%	45	41.0%	57	59.0%	58	59.4%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-23	-20.5%	-43	-31.9%	-29	-24.2%	-18	-16.3%
Anesthesiology	-5	-4.5%	-24	-18.2%	-11	-9.4%	1	0.6%
Radiology	4	3.0%	-18	-11.8%	-4	-2.9%	10	8.4%
Emergency Medicine	53	51.8%	45	41.4%	58	59.5%	58	59.8%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-23	-20.4%	-42	-31.8%	-29	-24.1%	-18	-16.2%
Anesthesiology	-5	-4.3%	-24	-18.0%	-11	-9.3%	1	0.7%
Radiology	4	3.1%	-18	-11.7%	-4	-2.7%	10	8.6%
Emergency Medicine	53	52.1%	46	41.6%	58	59.7%	58	60.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	20	18.7%	2	1.7%	14	12.7%	25	25.0%
Ophthalmology	-14	-22.3%	-25	-33.5%	-16	-23.9%	-11	-18.2%
Otolaryngology	0	0.6%	-7	-13.8%	-1	-3.3%	2	5.9%
Orthopedic Surgery	9	10.3%	-6	-5.5%	4	3.7%	14	16.1%
25% Primary Care/75% Non-Primary Care								
General Surgery	20	19.1%	2	2.0%	15	13.0%	26	25.3%
Ophthalmology	-14	-22.1%	-25	-33.3%	-15	-23.7%	-11	-18.0%
Otolaryngology	0	0.9%	-7	-13.6%	-1	-3.1%	2	6.2%
Orthopedic Surgery	9	10.6%	-5	-5.3%	4	4.0%	14	16.4%
20% Primary Care/80% Non-Primary Care								
General Surgery	21	19.3%	3	2.1%	15	13.1%	26	25.5%
Ophthalmology	-14	-22.0%	-25	-33.2%	-15	-23.5%	-11	-17.9%
Otolaryngology	0	1.1%	-7	-13.4%	-1	-2.9%	3	6.4%
Orthopedic Surgery	10	10.8%	-5	-5.1%	4	4.1%	14	16.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	2	2.2%	-16	-12.5%	-3	-3.1%	8	7.6%
Ophthalmology	-21	-32.6%	-32	-42.3%	-22	-33.9%	-18	-29.0%
Otolaryngology	-6	-13.5%	-13	-25.9%	-7	-16.9%	-4	-9.0%
Orthopedic Surgery	-3	-3.0%	-18	-16.9%	-8	-8.8%	2	2.1%
25% Primary Care/75% Non-Primary Care								
General Surgery	3	2.5%	-15	-12.2%	-3	-2.8%	8	7.9%
Ophthalmology	-21	-32.4%	-31	-42.1%	-22	-33.8%	-18	-28.8%
Otolaryngology	-6	-13.3%	-13	-25.7%	-7	-16.7%	-3	-8.7%
Orthopedic Surgery	-2	-2.7%	-17	-16.7%	-8	-8.6%	2	2.4%
20% Primary Care/80% Non-Primary Care								
General Surgery	3	2.6%	-15	-12.1%	-3	-2.6%	8	8.0%
Ophthalmology	-21	-32.3%	-31	-42.0%	-22	-33.7%	-17	-28.7%
Otolaryngology	-6	-13.1%	-13	-25.6%	-7	-16.6%	-3	-8.6%
Orthopedic Surgery	-2	-2.6%	-17	-16.6%	-8	-8.4%	2	2.5%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-8	-21.6%	-14	-32.8%	-10	-25.7%	-6	-17.4%
Other Surgical Subspecialties	-8	-12.7%	-18	-25.2%	-11	-16.8%	-5	-8.1%
Other Specialties	14	7.1%	-19	-8.3%	5	2.2%	24	12.7%
25% Primary Care/75% Non-Primary Care								
Urology	-8	-21.4%	-14	-32.7%	-10	-25.5%	-6	-17.2%
Other Surgical Subspecialties	-8	-12.4%	-18	-25.0%	-11	-16.6%	-5	-7.8%
Other Specialties	15	7.4%	-19	-8.0%	5	2.5%	25	13.1%
20% Primary Care/80% Non-Primary Care								
Urology	-8	-21.2%	-14	-32.5%	-10	-25.4%	-6	-17.1%
Other Surgical Subspecialties	-7	-12.3%	-18	-24.9%	-11	-16.5%	-4	-7.7%
Other Specialties	15	7.6%	-18	-7.9%	6	2.6%	25	13.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-12	-32.1%	-18	-41.9%	-14	-35.7%	-10	-28.6%
Other Surgical Subspecialties	-15	-24.9%	-25	-35.7%	-18	-28.5%	-12	-21.0%
Other Specialties	-16	-8.0%	-50	-21.2%	-26	-12.2%	-6	-3.1%
25% Primary Care/75% Non-Primary Care								
Urology	-12	-32.0%	-18	-41.7%	-14	-35.5%	-10	-28.4%
Other Surgical Subspecialties	-15	-24.7%	-25	-35.5%	-18	-28.3%	-12	-20.8%
Other Specialties	-16	-7.7%	-49	-21.0%	-25	-12.0%	-5	-2.9%
20% Primary Care/80% Non-Primary Care								
Urology	-11	-31.8%	-18	-41.6%	-13	-35.4%	-10	-28.3%
Other Surgical Subspecialties	-15	-24.6%	-25	-35.4%	-18	-28.2%	-12	-20.6%
Other Specialties	-15	-7.6%	-49	-20.8%	-25	-11.8%	-5	-2.7%

Central New York Supply Scenario 3b: Decreased Retention of Physicians

Figure 13 – Projected Difference Between Physician Supply and Demand in Central New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	197	8.9%	-93	-3.7%	95	4.1%	275	12.9%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	197	8.9%	-93	-3.7%	95	4.1%	275	12.9%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	197	8.9%	-93	-3.7%	95	4.1%	275	12.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-126	-5.7%	-416	-16.7%	-228	-9.8%	-48	-2.2%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-126	-5.7%	-416	-16.7%	-228	-9.8%	-48	-2.2%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-126	-5.7%	-416	-16.7%	-228	-9.8%	-48	-2.2%

Figure 14 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	19	2.9%	-29	-4.2%	-12	-1.8%	19	2.9%
Non-Primary Care	178	11.4%	-64	-3.6%	108	6.6%	256	17.3%
25% Primary Care/75% Non-Primary Care								
Primary Care	24	3.6%	-24	-3.5%	-7	-1.1%	24	3.6%
Non-Primary Care	174	11.1%	-69	-3.8%	103	6.3%	252	17.0%
20% Primary Care/80% Non-Primary Care								
Primary Care	27	4.1%	-21	-3.1%	-5	-0.7%	27	4.1%
Non-Primary Care	171	10.9%	-72	-4.0%	100	6.1%	249	16.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-61	-9.4%	-109	-15.6%	-92	-13.5%	-61	-9.4%
Non-Primary Care	-65	-4.1%	-307	-17.0%	-135	-8.3%	13	0.9%
25% Primary Care/75% Non-Primary Care								
Primary Care	-57	-8.7%	-105	-15.0%	-88	-12.9%	-57	-8.7%
Non-Primary Care	-69	-4.4%	-311	-17.3%	-140	-8.6%	9	0.6%
20% Primary Care/80% Non-Primary Care								
Primary Care	-54	-8.4%	-102	-14.6%	-85	-12.5%	-54	-8.4%
Non-Primary Care	-71	-4.6%	-314	-17.4%	-142	-8.7%	6	0.4%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 15 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	19	2.9%	-29	-4.2%	-12	-1.8%	19	2.9%
General/Family Medicine	-8	-3.2%	-27	-9.9%	-17	-6.4%	-8	-3.2%
General Internal Medicine	-5	-2.1%	-24	-8.8%	-21	-7.8%	-5	-2.1%
General Pediatrics	32	23.3%	22	14.8%	26	17.7%	32	23.3%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	24	3.6%	-24	-3.5%	-7	-1.1%	24	3.6%
General/Family Medicine	-6	-2.5%	-25	-9.2%	-15	-5.7%	-6	-2.5%
General Internal Medicine	-4	-1.4%	-23	-8.2%	-19	-7.1%	-4	-1.4%
General Pediatrics	34	24.2%	23	15.7%	27	18.5%	34	24.2%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	27	4.1%	-21	-3.1%	-5	-0.7%	27	4.1%
General/Family Medicine	-5	-2.1%	-24	-8.8%	-14	-5.3%	-5	-2.1%
General Internal Medicine	-2	-1.0%	-22	-7.8%	-18	-6.7%	-2	-1.0%
General Pediatrics	34	24.7%	24	16.2%	28	19.0%	34	24.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-61	-9.4%	-109	-15.6%	-92	-13.5%	-61	-9.4%
General/Family Medicine	-33	-13.1%	-52	-19.0%	-42	-15.9%	-33	-13.1%
General Internal Medicine	-41	-15.8%	-60	-21.6%	-57	-20.7%	-41	-15.8%
General Pediatrics	13	9.2%	3	1.7%	6	4.2%	13	9.2%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-57	-8.7%	-105	-15.0%	-88	-12.9%	-57	-8.7%
General/Family Medicine	-32	-12.4%	-50	-18.5%	-40	-15.3%	-32	-12.4%
General Internal Medicine	-39	-15.2%	-58	-21.0%	-55	-20.1%	-39	-15.2%
General Pediatrics	14	10.0%	4	2.4%	7	5.0%	14	10.0%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-54	-8.4%	-102	-14.6%	-85	-12.5%	-54	-8.4%
General/Family Medicine	-31	-12.1%	-49	-18.1%	-39	-14.9%	-31	-12.1%
General Internal Medicine	-38	-14.8%	-57	-20.7%	-54	-19.8%	-38	-14.8%
General Pediatrics	15	10.5%	4	2.9%	8	5.4%	15	10.5%

Non-Primary Care Specialties

Figure 16 – Projected Difference Between Physician Supply and Demand in Central New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	13	16.6%	0	-0.2%	10	11.8%	17	22.7%
Other Internal Medicine Subspecialties	96	37.2%	53	17.5%	81	29.7%	109	44.4%
Obstetrics and Gynecology	19	19.2%	12	11.0%	14	13.7%	24	25.5%
Pathology	-17	-25.6%	-28	-36.3%	-21	-29.8%	-13	-21.7%
25% Primary Care/75% Non-Primary Care								
Cardiology	13	16.3%	0	-0.4%	9	11.5%	17	22.4%
Other Internal Medicine Subspecialties	95	36.8%	52	17.1%	80	29.4%	108	44.0%
Obstetrics and Gynecology	19	18.9%	11	10.7%	14	13.4%	24	25.1%
Pathology	-17	-25.8%	-28	-36.5%	-21	-30.0%	-14	-21.9%
20% Primary Care/80% Non-Primary Care								
Cardiology	13	16.1%	-1	-0.6%	9	11.3%	16	22.2%
Other Internal Medicine Subspecialties	94	36.5%	51	16.9%	79	29.1%	107	43.7%
Obstetrics and Gynecology	19	18.7%	11	10.5%	14	13.2%	24	24.9%
Pathology	-17	-25.9%	-28	-36.6%	-21	-30.2%	-14	-22.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	1	0.7%	-13	-13.7%	-3	-3.4%	4	6.0%
Other Internal Medicine Subspecialties	43	16.8%	0	0.1%	29	10.5%	56	23.0%
Obstetrics and Gynecology	2	1.9%	-6	-5.1%	-3	-2.8%	7	7.2%
Pathology	-23	-35.6%	-34	-44.9%	-27	-39.3%	-20	-32.2%
25% Primary Care/75% Non-Primary Care								
Cardiology	0	0.4%	-13	-14.0%	-3	-3.7%	4	5.7%
Other Internal Medicine Subspecialties	43	16.5%	-1	-0.2%	28	10.2%	55	22.6%
Obstetrics and Gynecology	2	1.6%	-6	-5.4%	-3	-3.1%	7	6.9%
Pathology	-23	-35.8%	-34	-45.0%	-27	-39.5%	-20	-32.4%
20% Primary Care/80% Non-Primary Care								
Cardiology	0	0.3%	-13	-14.1%	-3	-3.8%	4	5.6%
Other Internal Medicine Subspecialties	42	16.3%	-1	-0.4%	27	10.0%	55	22.4%
Obstetrics and Gynecology	1	1.4%	-6	-5.6%	-3	-3.3%	6	6.7%
Pathology	-23	-35.9%	-34	-45.1%	-27	-39.6%	-20	-32.5%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-10	-8.9%	-29	-22.0%	-16	-13.1%	-4	-4.1%
Anesthesiology	5	4.3%	-14	-10.7%	-1	-1.1%	10	9.8%
Radiology	16	12.7%	-5	-3.5%	9	6.3%	23	18.6%
Emergency Medicine	69	67.3%	61	55.8%	74	75.7%	74	76.1%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-10	-9.2%	-30	-22.2%	-16	-13.4%	-5	-4.4%
Anesthesiology	5	4.0%	-14	-11.0%	-2	-1.4%	10	9.5%
Radiology	16	12.4%	-6	-3.7%	8	6.0%	22	18.3%
Emergency Medicine	68	66.9%	61	55.4%	73	75.3%	73	75.6%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-11	-9.3%	-30	-22.4%	-16	-13.5%	-5	-4.6%
Anesthesiology	4	3.8%	-15	-11.1%	-2	-1.6%	10	9.3%
Radiology	16	12.2%	-6	-3.9%	8	5.8%	22	18.1%
Emergency Medicine	68	66.6%	60	55.1%	73	75.0%	73	75.3%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-28	-24.2%	-47	-35.1%	-33	-27.7%	-22	-20.2%
Anesthesiology	-10	-8.9%	-29	-22.0%	-16	-13.6%	-4	-4.1%
Radiology	-2	-1.8%	-24	-15.9%	-10	-7.4%	4	3.3%
Emergency Medicine	46	44.7%	38	34.8%	51	52.0%	51	52.4%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-28	-24.4%	-47	-35.3%	-33	-27.9%	-22	-20.5%
Anesthesiology	-10	-9.2%	-29	-22.2%	-17	-13.9%	-5	-4.4%
Radiology	-3	-2.1%	-24	-16.2%	-11	-7.7%	4	3.0%
Emergency Medicine	45	44.3%	38	34.4%	50	51.6%	50	51.9%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-28	-24.6%	-47	-35.4%	-34	-28.0%	-22	-20.6%
Anesthesiology	-11	-9.3%	-29	-22.3%	-17	-14.0%	-5	-4.6%
Radiology	-3	-2.3%	-25	-16.3%	-11	-7.8%	4	2.9%
Emergency Medicine	45	44.1%	37	34.2%	50	51.3%	50	51.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	15	13.6%	-3	-2.7%	9	7.8%	20	19.6%
Ophthalmology	-16	-25.7%	-27	-36.3%	-18	-27.2%	-13	-21.8%
Otolaryngology	-2	-3.7%	-9	-17.6%	-3	-7.5%	1	1.3%
Orthopedic Surgery	5	5.5%	-10	-9.6%	-1	-0.8%	9	11.1%
25% Primary Care/75% Non-Primary Care								
General Surgery	14	13.3%	-4	-3.0%	8	7.5%	20	19.2%
Ophthalmology	-17	-25.9%	-27	-36.5%	-18	-27.4%	-13	-22.0%
Otolaryngology	-2	-4.0%	-9	-17.8%	-3	-7.8%	0	1.0%
Orthopedic Surgery	5	5.2%	-10	-9.9%	-1	-1.1%	9	10.8%
20% Primary Care/80% Non-Primary Care								
General Surgery	14	13.1%	-4	-3.2%	8	7.3%	19	19.0%
Ophthalmology	-17	-26.0%	-27	-36.6%	-18	-27.5%	-13	-22.1%
Otolaryngology	-2	-4.2%	-9	-17.9%	-3	-8.0%	0	0.9%
Orthopedic Surgery	4	5.0%	-10	-10.1%	-1	-1.3%	9	10.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-2	-2.3%	-20	-16.3%	-8	-7.3%	3	2.8%
Ophthalmology	-23	-35.5%	-33	-44.8%	-24	-36.8%	-20	-32.1%
Otolaryngology	-7	-17.3%	-14	-29.2%	-9	-20.6%	-5	-13.0%
Orthopedic Surgery	-6	-7.3%	-21	-20.6%	-12	-12.8%	-2	-2.4%
25% Primary Care/75% Non-Primary Care								
General Surgery	-3	-2.6%	-21	-16.6%	-9	-7.6%	3	2.5%
Ophthalmology	-23	-35.7%	-34	-44.9%	-24	-37.0%	-20	-32.3%
Otolaryngology	-7	-17.6%	-14	-29.4%	-9	-20.8%	-5	-13.2%
Orthopedic Surgery	-7	-7.5%	-22	-20.8%	-12	-13.1%	-2	-2.7%
20% Primary Care/80% Non-Primary Care								
General Surgery	-3	-2.8%	-21	-16.7%	-9	-7.7%	2	2.4%
Ophthalmology	-23	-35.8%	-34	-45.0%	-24	-37.1%	-20	-32.5%
Otolaryngology	-7	-17.7%	-14	-29.5%	-9	-20.9%	-5	-13.4%
Orthopedic Surgery	-7	-7.7%	-22	-20.9%	-13	-13.2%	-2	-2.8%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-9	-25.0%	-15	-35.8%	-11	-28.9%	-7	-21.0%
Other Surgical Subspecialties	-10	-16.5%	-20	-28.5%	-13	-20.4%	-7	-12.1%
Other Specialties	5	2.5%	-29	-12.3%	-5	-2.3%	15	7.8%
25% Primary Care/75% Non-Primary Care								
Urology	-9	-25.2%	-15	-35.9%	-11	-29.1%	-7	-21.3%
Other Surgical Subspecialties	-10	-16.7%	-20	-28.7%	-13	-20.7%	-7	-12.3%
Other Specialties	4	2.2%	-29	-12.5%	-5	-2.5%	14	7.5%
20% Primary Care/80% Non-Primary Care								
Urology	-9	-25.3%	-15	-36.0%	-11	-29.2%	-7	-21.4%
Other Surgical Subspecialties	-10	-16.8%	-21	-28.8%	-13	-20.8%	-7	-12.5%
Other Specialties	4	2.0%	-30	-12.7%	-6	-2.7%	14	7.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-13	-35.1%	-19	-44.4%	-15	-38.5%	-11	-31.7%
Other Surgical Subspecialties	-17	-28.2%	-27	-38.5%	-20	-31.6%	-14	-24.4%
Other Specialties	-24	-12.0%	-58	-24.7%	-34	-16.1%	-14	-7.4%
25% Primary Care/75% Non-Primary Care								
Urology	-13	-35.3%	-19	-44.6%	-15	-38.7%	-11	-31.9%
Other Surgical Subspecialties	-17	-28.4%	-28	-38.7%	-20	-31.8%	-14	-24.7%
Other Specialties	-25	-12.3%	-58	-24.9%	-34	-16.3%	-15	-7.7%
20% Primary Care/80% Non-Primary Care								
Urology	-13	-35.4%	-19	-44.7%	-15	-38.8%	-11	-32.0%
Other Surgical Subspecialties	-17	-28.6%	-28	-38.8%	-20	-32.0%	-14	-24.8%
Other Specialties	-25	-12.4%	-59	-25.0%	-35	-16.4%	-15	-7.8%

Relationship between Physician Supply and Demand in Finger Lakes 2030

Finger Lakes Supply Scenario 1: Baseline

Figure 1 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>All Physicians</i>	111	2.7%	-414	-8.9%	-88	-2.0%	247	6.2%
Supply responsive to demand								
<i>All Physicians</i>	-144	-3.5%	-670	-14.4%	-343	-7.9%	-9	-0.2%

Figure 2 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care</i>	-32	-2.3%	-137	-9.0%	-106	-7.1%	-32	-2.3%
<i>Non-Primary Care</i>	144	5.3%	-278	-8.9%	18	0.6%	279	10.9%
Supply responsive to demand								
<i>Primary Care</i>	-107	-7.5%	-211	-13.9%	-180	-12.1%	-107	-7.5%
<i>Non-Primary Care</i>	-37	-1.4%	-459	-14.7%	-163	-5.8%	98	3.8%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 3 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care (Overall)</i>	-32	-2.3%	-137	-9.0%	-106	-7.1%	-32	-2.3%
<i>General/Family Medicine</i>	-28	-7.9%	-54	-14.2%	-40	-10.9%	-28	-7.9%
<i>General Internal Medicine</i>	-55	-7.1%	-113	-13.4%	-103	-12.4%	-55	-7.1%
<i>General Pediatrics</i>	51	18.0%	30	9.9%	37	12.6%	51	18.0%
Supply responsive to demand								
<i>Primary Care (Overall)</i>	-107	-7.5%	-211	-13.9%	-180	-12.1%	-107	-7.5%
<i>General/Family Medicine</i>	-37	-10.5%	-63	-16.7%	-49	-13.5%	-37	-10.5%
<i>General Internal Medicine</i>	-104	-13.4%	-162	-19.3%	-152	-18.4%	-104	-13.4%
<i>General Pediatrics</i>	35	12.4%	14	4.6%	21	7.2%	35	12.4%

Non-Primary Care Specialties

Figure 4 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Cardiology	13	10.4%	-8	-5.4%	7	5.9%	19	16.2%
Other Internal Medicine Subspecialties	144	28.9%	60	10.4%	115	21.9%	169	35.7%
Obstetrics and Gynecology	22	11.9%	8	4.2%	13	6.7%	31	17.8%
Pathology	-33	-29.9%	-51	-39.9%	-39	-33.9%	-27	-26.2%
Supply responsive to demand								
Cardiology	4	3.1%	-17	-11.7%	-1	-1.2%	10	8.5%
Other Internal Medicine Subspecialties	97	19.5%	14	2.4%	69	13.0%	122	25.8%
Obstetrics and Gynecology	8	4.2%	-6	-3.0%	-1	-0.6%	17	9.7%
Pathology	-37	-34.1%	-55	-43.6%	-44	-37.9%	-32	-30.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Psychiatry	-32	-15.0%	-67	-27.2%	-42	-19.0%	-21	-10.6%
Anesthesiology	-4	-1.6%	-47	-15.7%	-18	-6.7%	9	3.6%
Radiology	13	5.6%	-26	-9.5%	-1	-0.4%	25	11.2%
Emergency Medicine	89	57.2%	77	46.4%	96	65.2%	96	65.5%
Supply responsive to demand								
Psychiatry	-47	-22.5%	-83	-33.6%	-58	-26.1%	-37	-18.4%
Anesthesiology	-17	-6.8%	-60	-20.2%	-31	-11.6%	-5	-1.9%
Radiology	1	0.4%	-38	-14.0%	-13	-5.3%	13	5.7%
Emergency Medicine	75	48.1%	63	37.9%	82	55.5%	82	55.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
General Surgery	9	6.5%	-15	-8.8%	1	1.0%	16	12.1%
Ophthalmology	-30	-30.6%	-46	-40.6%	-32	-32.0%	-25	-27.0%
Otolaryngology	-5	-10.1%	-12	-23.0%	-7	-13.7%	-2	-5.4%
Orthopedic Surgery	0	-0.3%	-25	-14.7%	-10	-6.3%	7	4.9%
Supply responsive to demand								
General Surgery	0	-0.1%	-24	-14.4%	-8	-5.2%	7	5.2%
Ophthalmology	-33	-34.1%	-49	-43.5%	-35	-35.4%	-28	-30.6%
Otolaryngology	-7	-15.4%	-15	-27.6%	-9	-18.8%	-5	-11.0%
Orthopedic Surgery	-7	-5.1%	-32	-18.8%	-17	-10.8%	0	-0.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Urology	-15	-30.4%	-23	-40.4%	-18	-34.0%	-12	-26.7%
Other Surgical Subspecialties	-13	-22.1%	-23	-33.3%	-16	-25.8%	-10	-18.0%
Other Supecialties	-15	-3.8%	-82	-17.6%	-34	-8.2%	5	1.3%
Supply responsive to demand								
Urology	-16	-33.6%	-25	-43.2%	-19	-37.1%	-14	-30.1%
Other Surgical Subspecialties	-15	-26.6%	-25	-37.1%	-18	-30.1%	-13	-22.7%
Other Specialties	-40	-10.0%	-107	-22.9%	-59	-14.1%	-20	-5.3%

Finger Lakes Supply Scenario 2: NP/PA High and Lower Growth

Figure 5 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	552	13.4%	27	0.6%	353	8.2%	687	17.3%
NP/PA Lower Growth								
<i>All Physicians</i>	306	7.4%	-220	-4.7%	107	2.5%	441	11.1%
Supply responsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	304	7.4%	-222	-4.8%	105	2.4%	439	11.0%
NP/PA Lower Growth								
<i>All Physicians</i>	70	1.7%	-455	-9.8%	-128	-3.0%	206	5.2%

Figure 6 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care	204	14.4%	100	6.5%	131	8.8%	204	14.4%
Non-Primary Care	348	12.9%	-73	-2.3%	223	7.9%	484	18.8%
NP/PA Lower Growth								
Primary Care	84	5.9%	-20	-1.3%	11	0.7%	84	5.9%
Non-Primary Care	222	8.2%	-199	-6.4%	96	3.4%	357	13.9%
Supply responsive to demand								
NP/PA High Growth								
Primary Care	112	7.9%	8	0.5%	39	2.6%	112	7.9%
Non-Primary Care	191	7.1%	-230	-7.4%	66	2.3%	327	12.7%
NP/PA Lower Growth								
Primary Care	-1	-0.1%	-105	-6.9%	-74	-5.0%	-1	-0.1%
Non-Primary Care	71	2.6%	-350	-11.2%	-54	-1.9%	206	8.0%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 7 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care (Overall)	204	14.4%	100	6.5%	131	8.8%	204	14.4%
General/Family Medicine	28	7.8%	2	0.4%	16	4.3%	28	7.8%
General Internal Medicine	69	8.8%	11	1.3%	21	2.5%	69	8.8%
General Pediatrics	108	38.1%	87	28.6%	94	31.8%	108	38.1%
NP/PA Lower Growth								
Primary Care (Overall)	84	5.9%	-20	-1.3%	11	0.7%	84	5.9%
General/Family Medicine	-1	-0.2%	-27	-7.0%	-13	-3.4%	-1	-0.2%
General Internal Medicine	6	0.8%	-52	-6.2%	-42	-5.1%	6	0.8%
General Pediatrics	79	27.9%	58	19.1%	65	22.1%	79	27.9%
Supply responsive to demand								
NP/PA High Growth								
Primary Care (Overall)	112	7.9%	8	0.5%	39	2.6%	112	7.9%
General/Family Medicine	16	4.4%	-10	-2.8%	4	1.0%	16	4.4%
General Internal Medicine	9	1.1%	-49	-5.8%	-39	-4.7%	9	1.1%
General Pediatrics	88	31.2%	67	22.2%	74	25.2%	88	31.2%
NP/PA Lower Growth								
Primary Care (Overall)	-1	-0.1%	-105	-6.9%	-74	-5.0%	-1	-0.1%
General/Family Medicine	-12	-3.3%	-38	-9.9%	-24	-6.5%	-12	-3.3%
General Internal Medicine	-50	-6.4%	-107	-12.8%	-98	-11.8%	-50	-6.4%
General Pediatrics	61	21.5%	40	13.1%	47	15.9%	61	21.5%

Non-Primary Care Specialties

Figure 8 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Cardiology	22	18.4%	2	1.4%	17	13.5%	28	24.6%
Other Internal Medicine Subspecialties	190	38.2%	107	18.3%	162	30.7%	215	45.5%
Obstetrics and Gynecology	37	19.9%	23	11.7%	28	14.4%	46	26.2%
Pathology	-27	-24.8%	-45	-35.6%	-34	-29.1%	-22	-20.9%
NP/PA Lower Growth								
Cardiology	16	13.5%	-4	-2.8%	11	8.8%	22	19.4%
Other Internal Medicine Subspecialties	162	32.5%	78	13.4%	133	25.3%	187	39.4%
Obstetrics and Gynecology	28	14.9%	14	7.0%	19	9.7%	37	21.0%
Pathology	-30	-27.9%	-49	-38.3%	-37	-32.1%	-25	-24.1%
Supply responsive to demand								
NP/PA High Growth								
Cardiology	14	11.9%	-6	-4.2%	9	7.3%	20	17.8%
Other Internal Medicine Subspecialties	148	29.8%	65	11.1%	120	22.7%	173	36.6%
Obstetrics and Gynecology	24	13.1%	11	5.4%	15	7.9%	34	19.1%
Pathology	-31	-28.5%	-49	-38.8%	-38	-32.6%	-26	-24.7%
NP/PA Lower Growth								
Cardiology	9	7.3%	-12	-8.2%	4	2.8%	15	12.9%
Other Internal Medicine Subspecialties	122	24.4%	38	6.5%	93	17.7%	146	31.0%
Obstetrics and Gynecology	16	8.4%	2	1.0%	7	3.5%	25	14.1%
Pathology	-34	-31.5%	-53	-41.3%	-41	-35.4%	-29	-27.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Psychiatry	-19	-8.9%	-54	-22.0%	-29	-13.1%	-8	-4.1%
Anesthesiology	14	5.5%	-29	-9.7%	0	0.0%	27	11.1%
Radiology	31	13.2%	-8	-3.0%	17	6.8%	42	19.2%
Emergency Medicine	106	68.6%	95	57.0%	114	77.0%	114	77.4%
NP/PA Lower Growth								
Psychiatry	-27	-12.7%	-62	-25.2%	-37	-16.7%	-16	-8.1%
Anesthesiology	3	1.1%	-40	-13.4%	-11	-4.1%	16	6.4%
Radiology	20	8.5%	-19	-7.1%	6	2.4%	31	14.2%
Emergency Medicine	95	61.6%	84	50.5%	103	69.7%	103	70.1%
Supply responsive to demand								
NP/PA High Growth								
Psychiatry	-33	-15.8%	-69	-27.9%	-44	-19.7%	-23	-11.4%
Anesthesiology	3	1.2%	-40	-13.4%	-11	-4.1%	16	6.5%
Radiology	21	9.0%	-18	-6.6%	7	2.8%	33	14.8%
Emergency Medicine	94	60.8%	83	49.7%	102	68.9%	102	69.2%
NP/PA Lower Growth								
Psychiatry	-41	-19.3%	-76	-30.9%	-51	-23.0%	-30	-15.1%
Anesthesiology	-8	-3.0%	-50	-16.9%	-22	-8.0%	5	2.1%
Radiology	10	4.5%	-28	-10.5%	-4	-1.4%	22	10.0%
Emergency Medicine	84	54.1%	72	43.5%	91	61.9%	92	62.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
General Surgery	20	14.1%	-4	-2.3%	12	8.3%	27	20.1%
Ophthalmology	-25	-25.6%	-41	-36.3%	-27	-27.1%	-20	-21.7%
Otolaryngology	-2	-3.6%	-9	-17.5%	-4	-7.4%	1	1.4%
Orthopedic Surgery	10	6.8%	-14	-8.5%	1	0.4%	17	12.4%
NP/PA Lower Growth								
General Surgery	13	9.4%	-10	-6.3%	6	3.8%	20	15.1%
Ophthalmology	-28	-28.7%	-44	-39.0%	-30	-30.2%	-23	-25.0%
Otolaryngology	-4	-7.6%	-11	-20.9%	-5	-11.3%	-1	-2.8%
Orthopedic Surgery	3	2.4%	-21	-12.3%	-6	-3.7%	11	7.8%
Supply responsive to demand								
NP/PA High Growth								
General Surgery	12	8.5%	-12	-7.1%	4	3.0%	19	14.2%
Ophthalmology	-28	-28.4%	-44	-38.7%	-30	-29.8%	-23	-24.6%
Otolaryngology	-4	-8.2%	-11	-21.4%	-6	-11.8%	-1	-3.3%
Orthopedic Surgery	4	3.0%	-20	-11.8%	-5	-3.2%	12	8.4%
NP/PA Lower Growth								
General Surgery	6	4.0%	-18	-10.9%	-2	-1.3%	13	9.5%
Ophthalmology	-30	-31.4%	-47	-41.2%	-32	-32.8%	-26	-27.8%
Otolaryngology	-6	-12.0%	-13	-24.6%	-7	-15.4%	-3	-7.3%
Orthopedic Surgery	-2	-1.3%	-26	-15.4%	-11	-7.2%	5	3.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Urology	-12	-25.4%	-21	-36.1%	-15	-29.3%	-10	-21.4%
Other Surgical Subspecialties	-10	-16.5%	-19	-28.5%	-12	-20.5%	-7	-12.1%
Other Specialties	13	3.2%	-55	-11.6%	-7	-1.6%	33	8.6%
NP/PA Lower Growth								
Urology	-14	-28.5%	-22	-38.7%	-17	-32.2%	-11	-24.7%
Other Surgical Subspecialties	-12	-20.0%	-21	-31.5%	-14	-23.8%	-9	-15.8%
Other Specialties	-4	-1.1%	-72	-15.3%	-24	-5.7%	16	4.1%
Supply responsive to demand								
NP/PA High Growth								
Urology	-14	-27.9%	-22	-38.3%	-16	-31.7%	-11	-24.1%
Other Surgical Subspecialties	-12	-20.3%	-21	-31.7%	-15	-24.1%	-9	-16.1%
Other Specialties	-9	-2.3%	-76	-16.3%	-28	-6.8%	11	2.9%
NP/PA Lower Growth								
Urology	-15	-30.9%	-23	-40.8%	-18	-34.6%	-13	-27.3%
Other Surgical Subspecialties	-14	-23.6%	-23	-34.6%	-17	-27.2%	-11	-19.6%
Other Specialties	-25	-6.3%	-93	-19.8%	-45	-10.6%	-5	-1.4%

Finger Lakes Supply Scenario 3a: Increased Retention of Physicians

Figure 9 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	213	5.2%	-313	-6.7%	14	0.3%	348	8.7%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	213	5.2%	-313	-6.7%	14	0.3%	348	8.7%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	213	5.2%	-313	-6.7%	14	0.3%	348	8.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-48	-1.2%	-574	-12.4%	-247	-5.7%	87	2.2%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-48	-1.2%	-574	-12.4%	-247	-5.7%	87	2.2%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-48	-1.2%	-574	-12.4%	-247	-5.7%	87	2.2%

Figure 10 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	1	0.1%	-103	-6.8%	-72	-4.8%	1	0.1%
Non-Primary Care	211	7.8%	-210	-6.7%	86	3.0%	346	13.5%
25% Primary Care/75% Non-Primary Care								
Primary Care	-7	-0.5%	-111	-7.3%	-80	-5.4%	-7	-0.5%
Non-Primary Care	220	8.1%	-202	-6.5%	94	3.3%	355	13.8%
20% Primary Care/80% Non-Primary Care								
Primary Care	-12	-0.9%	-116	-7.7%	-85	-5.7%	-12	-0.9%
Non-Primary Care	225	8.3%	-197	-6.3%	99	3.5%	360	14.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-75	-5.3%	-179	-11.8%	-148	-9.9%	-75	-5.3%
Non-Primary Care	27	1.0%	-395	-12.6%	-99	-3.5%	162	6.3%
25% Primary Care/75% Non-Primary Care								
Primary Care	-83	-5.8%	-187	-12.3%	-156	-10.5%	-83	-5.8%
Non-Primary Care	35	1.3%	-387	-12.4%	-91	-3.2%	170	6.6%
20% Primary Care/80% Non-Primary Care								
Primary Care	-87	-6.2%	-192	-12.6%	-161	-10.8%	-87	-6.2%
Non-Primary Care	39	1.5%	-382	-12.2%	-86	-3.1%	174	6.8%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 11 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	1	0.1%	-103	-6.8%	-72	-4.8%	1	0.1%
General/Family Medicine	-20	-5.7%	-46	-12.1%	-32	-8.8%	-20	-5.7%
General Internal Medicine	-37	-4.8%	-95	-11.3%	-85	-10.3%	-37	-4.8%
General Pediatrics	59	20.9%	38	12.6%	45	15.3%	59	20.9%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-7	-0.5%	-111	-7.3%	-80	-5.4%	-7	-0.5%
General/Family Medicine	-22	-6.2%	-48	-12.7%	-34	-9.3%	-22	-6.2%
General Internal Medicine	-42	-5.4%	-99	-11.9%	-90	-10.8%	-42	-5.4%
General Pediatrics	57	20.1%	36	11.9%	43	14.7%	57	20.1%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-12	-0.9%	-116	-7.7%	-85	-5.7%	-12	-0.9%
General/Family Medicine	-23	-6.6%	-49	-13.0%	-35	-9.6%	-23	-6.6%
General Internal Medicine	-45	-5.7%	-102	-12.2%	-92	-11.1%	-45	-5.7%
General Pediatrics	56	19.7%	35	11.5%	42	14.2%	56	19.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-75	-5.3%	-179	-11.8%	-148	-9.9%	-75	-5.3%
General/Family Medicine	-29	-8.4%	-55	-14.7%	-41	-11.4%	-29	-8.4%
General Internal Medicine	-88	-11.3%	-146	-17.4%	-136	-16.4%	-88	-11.3%
General Pediatrics	43	15.1%	22	7.2%	29	9.9%	43	15.1%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-83	-5.8%	-187	-12.3%	-156	-10.5%	-83	-5.8%
General/Family Medicine	-31	-8.9%	-57	-15.2%	-43	-11.9%	-31	-8.9%
General Internal Medicine	-92	-11.8%	-150	-17.8%	-140	-16.9%	-92	-11.8%
General Pediatrics	41	14.4%	20	6.6%	27	9.2%	41	14.4%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-87	-6.2%	-192	-12.6%	-161	-10.8%	-87	-6.2%
General/Family Medicine	-33	-9.2%	-58	-15.5%	-44	-12.2%	-33	-9.2%
General Internal Medicine	-94	-12.1%	-152	-18.1%	-142	-17.2%	-94	-12.1%
General Pediatrics	40	14.0%	19	6.2%	26	8.8%	40	14.0%

Non-Primary Care Specialties

Figure 12 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	16	13.0%	-5	-3.2%	11	8.4%	22	19.0%
Other Internal Medicine Subspecialties	159	32.0%	76	13.0%	131	24.8%	184	38.9%
Obstetrics and Gynecology	27	14.5%	13	6.7%	18	9.3%	36	20.6%
Pathology	-31	-28.2%	-49	-38.5%	-37	-32.3%	-25	-24.4%
25% Primary Care/75% Non-Primary Care								
Cardiology	16	13.4%	-4	-2.9%	11	8.7%	22	19.3%
Other Internal Medicine Subspecialties	161	32.4%	78	13.3%	133	25.2%	186	39.3%
Obstetrics and Gynecology	28	14.9%	14	7.0%	19	9.6%	37	20.9%
Pathology	-31	-28.0%	-49	-38.3%	-37	-32.1%	-25	-24.2%
20% Primary Care/80% Non-Primary Care								
Cardiology	16	13.6%	-4	-2.7%	11	8.9%	22	19.5%
Other Internal Medicine Subspecialties	162	32.6%	79	13.5%	134	25.4%	187	39.6%
Obstetrics and Gynecology	28	15.1%	14	7.2%	19	9.8%	37	21.1%
Pathology	-30	-27.9%	-49	-38.2%	-37	-32.0%	-25	-24.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	7	5.5%	-14	-9.6%	2	1.2%	13	11.1%
Other Internal Medicine Subspecialties	112	22.4%	28	4.8%	83	15.8%	136	28.8%
Obstetrics and Gynecology	12	6.7%	-1	-0.6%	3	1.8%	22	12.3%
Pathology	-35	-32.6%	-54	-42.2%	-42	-36.4%	-30	-29.0%
25% Primary Care/75% Non-Primary Care								
Cardiology	7	5.8%	-13	-9.4%	2	1.5%	13	11.4%
Other Internal Medicine Subspecialties	113	22.8%	30	5.1%	85	16.1%	138	29.2%
Obstetrics and Gynecology	13	7.0%	-1	-0.3%	4	2.1%	22	12.6%
Pathology	-35	-32.4%	-54	-42.1%	-42	-36.2%	-30	-28.8%
20% Primary Care/80% Non-Primary Care								
Cardiology	7	6.0%	-13	-9.2%	2	1.7%	13	11.6%
Other Internal Medicine Subspecialties	114	23.0%	31	5.3%	86	16.3%	139	29.4%
Obstetrics and Gynecology	13	7.2%	0	-0.2%	4	2.3%	23	12.8%
Pathology	-35	-32.2%	-53	-42.0%	-42	-36.1%	-30	-28.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-27	-13.0%	-63	-25.5%	-38	-17.0%	-17	-8.5%
Anesthesiology	2	0.8%	-41	-13.7%	-12	-4.5%	15	6.1%
Radiology	19	8.1%	-20	-7.4%	5	2.0%	30	13.8%
Emergency Medicine	95	61.0%	83	49.9%	102	69.1%	102	69.5%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-27	-12.8%	-62	-25.3%	-37	-16.8%	-16	-8.2%
Anesthesiology	3	1.0%	-40	-13.5%	-11	-4.2%	15	6.4%
Radiology	20	8.4%	-19	-7.1%	6	2.3%	31	14.2%
Emergency Medicine	95	61.4%	84	50.4%	103	69.6%	103	69.9%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-27	-12.6%	-62	-25.2%	-37	-16.6%	-16	-8.0%
Anesthesiology	3	1.2%	-40	-13.3%	-11	-4.0%	16	6.5%
Radiology	20	8.6%	-19	-7.0%	6	2.5%	32	14.4%
Emergency Medicine	96	61.7%	84	50.6%	103	69.9%	103	70.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-44	-20.6%	-79	-32.0%	-54	-24.3%	-33	-16.5%
Anesthesiology	-12	-4.6%	-54	-18.3%	-26	-9.5%	1	0.4%
Radiology	7	2.8%	-32	-11.9%	-7	-3.0%	18	8.2%
Emergency Medicine	80	51.6%	69	41.2%	87	59.3%	88	59.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-43	-20.4%	-78	-31.8%	-53	-24.1%	-32	-16.2%
Anesthesiology	-11	-4.3%	-54	-18.0%	-25	-9.3%	2	0.7%
Radiology	7	3.1%	-32	-11.7%	-7	-2.7%	19	8.6%
Emergency Medicine	81	52.1%	69	41.6%	88	59.7%	88	60.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-43	-20.3%	-78	-31.7%	-53	-23.9%	-32	-16.1%
Anesthesiology	-11	-4.1%	-53	-17.9%	-24	-9.1%	2	0.9%
Radiology	8	3.3%	-31	-11.5%	-6	-2.6%	19	8.7%
Emergency Medicine	81	52.3%	70	41.9%	89	60.0%	89	60.4%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	13	9.0%	-11	-6.7%	5	3.4%	20	14.7%
Ophthalmology	-28	-29.0%	-44	-39.2%	-30	-30.4%	-23	-25.2%
Otolaryngology	-4	-8.0%	-11	-21.2%	-6	-11.6%	-1	-3.1%
Orthopedic Surgery	3	2.0%	-21	-12.6%	-6	-4.1%	10	7.4%
25% Primary Care/75% Non-Primary Care								
General Surgery	13	9.3%	-11	-6.4%	5	3.7%	20	15.0%
Ophthalmology	-28	-28.8%	-44	-39.0%	-30	-30.2%	-23	-25.0%
Otolaryngology	-4	-7.7%	-11	-21.0%	-5	-11.4%	-1	-2.9%
Orthopedic Surgery	3	2.3%	-21	-12.4%	-6	-3.8%	11	7.7%
20% Primary Care/80% Non-Primary Care								
General Surgery	13	9.5%	-10	-6.2%	6	3.9%	20	15.2%
Ophthalmology	-28	-28.6%	-44	-38.9%	-30	-30.1%	-23	-24.9%
Otolaryngology	-3	-7.6%	-11	-20.8%	-5	-11.2%	-1	-2.7%
Orthopedic Surgery	4	2.5%	-21	-12.2%	-6	-3.6%	11	7.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	3	2.3%	-20	-12.4%	-4	-2.9%	10	7.7%
Ophthalmology	-31	-32.5%	-48	-42.2%	-34	-33.8%	-27	-28.9%
Otolaryngology	-6	-13.4%	-14	-25.8%	-8	-16.8%	-4	-8.8%
Orthopedic Surgery	-4	-2.9%	-28	-16.8%	-13	-8.7%	3	2.3%
25% Primary Care/75% Non-Primary Care								
General Surgery	4	2.6%	-20	-12.1%	-4	-2.6%	11	8.0%
Ophthalmology	-31	-32.3%	-48	-42.0%	-33	-33.7%	-26	-28.7%
Otolaryngology	-6	-13.1%	-14	-25.6%	-8	-16.6%	-4	-8.6%
Orthopedic Surgery	-4	-2.6%	-28	-16.6%	-13	-8.4%	3	2.6%
20% Primary Care/80% Non-Primary Care								
General Surgery	4	2.8%	-20	-12.0%	-4	-2.5%	11	8.2%
Ophthalmology	-31	-32.2%	-47	-41.9%	-33	-33.5%	-26	-28.6%
Otolaryngology	-6	-13.0%	-14	-25.5%	-8	-16.4%	-4	-8.4%
Orthopedic Surgery	-3	-2.4%	-28	-16.4%	-13	-8.3%	4	2.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-14	-28.7%	-22	-39.0%	-17	-32.5%	-12	-25.0%
Other Surgical Subspecialties	-12	-20.3%	-21	-31.7%	-15	-24.1%	-9	-16.1%
Other Specialties	-6	-1.5%	-73	-15.6%	-25	-6.0%	14	3.7%
25% Primary Care/75% Non-Primary Care								
Urology	-14	-28.5%	-22	-38.8%	-17	-32.3%	-12	-24.7%
Other Surgical Subspecialties	-12	-20.0%	-21	-31.5%	-15	-23.9%	-9	-15.8%
Other Specialties	-5	-1.2%	-72	-15.4%	-24	-5.7%	15	4.0%
20% Primary Care/80% Non-Primary Care								
Urology	-14	-28.4%	-22	-38.7%	-17	-32.1%	-11	-24.6%
Other Surgical Subspecialties	-12	-19.9%	-21	-31.4%	-14	-23.7%	-9	-15.7%
Other Specialties	-4	-1.0%	-71	-15.2%	-23	-5.6%	16	4.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-16	-32.0%	-24	-41.8%	-18	-35.6%	-13	-28.5%
Other Surgical Subspecialties	-14	-24.8%	-24	-35.6%	-17	-28.4%	-11	-20.9%
Other Specialties	-31	-7.8%	-99	-21.1%	-51	-12.1%	-11	-3.0%
25% Primary Care/75% Non-Primary Care								
Urology	-16	-31.8%	-24	-41.6%	-18	-35.4%	-13	-28.3%
Other Surgical Subspecialties	-14	-24.6%	-24	-35.4%	-17	-28.2%	-11	-20.6%
Other Specialties	-30	-7.6%	-98	-20.8%	-50	-11.8%	-10	-2.7%
20% Primary Care/80% Non-Primary Care								
Urology	-16	-31.7%	-24	-41.5%	-18	-35.3%	-13	-28.1%
Other Surgical Subspecialties	-14	-24.5%	-24	-35.3%	-17	-28.1%	-11	-20.5%
Other Specialties	-30	-7.4%	-97	-20.7%	-49	-11.7%	-10	-2.5%

Finger Lakes Supply Scenario 3b: Decreased Retention of Physicians

Figure 13 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	10	0.2%	-516	-11.1%	-189	-4.4%	145	3.6%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	10	0.2%	-516	-11.1%	-189	-4.4%	145	3.6%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	10	0.2%	-516	-11.1%	-189	-4.4%	145	3.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-240	-5.8%	-765	-16.5%	-439	-10.2%	-105	-2.6%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-240	-5.8%	-765	-16.5%	-439	-10.2%	-105	-2.6%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-240	-5.8%	-765	-16.5%	-439	-10.2%	-105	-2.6%

Figure 14 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-66	-4.7%	-170	-11.2%	-139	-9.4%	-66	-4.7%
Non-Primary Care	76	2.8%	-345	-11.0%	-50	-1.8%	211	8.2%
25% Primary Care/75% Non-Primary Care								
Primary Care	-58	-4.1%	-162	-10.7%	-131	-8.8%	-58	-4.1%
Non-Primary Care	68	2.5%	-354	-11.3%	-58	-2.0%	203	7.9%
20% Primary Care/80% Non-Primary Care								
Primary Care	-53	-3.7%	-157	-10.3%	-126	-8.5%	-53	-3.7%
Non-Primary Care	63	2.3%	-359	-11.5%	-63	-2.2%	198	7.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-139	-9.8%	-243	-16.0%	-212	-14.2%	-139	-9.8%
Non-Primary Care	-101	-3.7%	-523	-16.7%	-227	-8.0%	34	1.3%
25% Primary Care/75% Non-Primary Care								
Primary Care	-131	-9.2%	-235	-15.5%	-204	-13.7%	-131	-9.2%
Non-Primary Care	-109	-4.0%	-531	-17.0%	-235	-8.3%	26	1.0%
20% Primary Care/80% Non-Primary Care								
Primary Care	-126	-8.9%	-230	-15.1%	-199	-13.4%	-126	-8.9%
Non-Primary Care	-114	-4.2%	-535	-17.1%	-240	-8.5%	21	0.8%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 15 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-66	-4.7%	-170	-11.2%	-139	-9.4%	-66	-4.7%
General/Family Medicine	-36	-10.2%	-62	-16.3%	-48	-13.1%	-36	-10.2%
General Internal Medicine	-73	-9.3%	-130	-15.6%	-121	-14.6%	-73	-9.3%
General Pediatrics	43	15.1%	22	7.2%	29	9.9%	43	15.1%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-58	-4.1%	-162	-10.7%	-131	-8.8%	-58	-4.1%
General/Family Medicine	-34	-9.6%	-60	-15.8%	-46	-12.6%	-34	-9.6%
General Internal Medicine	-68	-8.8%	-126	-15.0%	-116	-14.0%	-68	-8.8%
General Pediatrics	45	15.8%	24	7.9%	31	10.5%	45	15.8%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-53	-3.7%	-157	-10.3%	-126	-8.5%	-53	-3.7%
General/Family Medicine	-33	-9.3%	-59	-15.5%	-45	-12.2%	-33	-9.3%
General Internal Medicine	-66	-8.4%	-123	-14.7%	-114	-13.7%	-66	-8.4%
General Pediatrics	46	16.3%	25	8.3%	32	10.9%	46	16.3%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-139	-9.8%	-243	-16.0%	-212	-14.2%	-139	-9.8%
General/Family Medicine	-45	-12.7%	-71	-18.7%	-57	-15.6%	-45	-12.7%
General Internal Medicine	-121	-15.5%	-179	-21.3%	-169	-20.4%	-121	-15.5%
General Pediatrics	27	9.6%	6	2.1%	14	4.6%	27	9.6%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-131	-9.2%	-235	-15.5%	-204	-13.7%	-131	-9.2%
General/Family Medicine	-43	-12.2%	-69	-18.2%	-55	-15.1%	-43	-12.2%
General Internal Medicine	-117	-15.0%	-174	-20.8%	-165	-19.9%	-117	-15.0%
General Pediatrics	29	10.3%	8	2.7%	16	5.3%	29	10.3%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-126	-8.9%	-230	-15.1%	-199	-13.4%	-126	-8.9%
General/Family Medicine	-42	-11.9%	-68	-17.9%	-54	-14.7%	-42	-11.9%
General Internal Medicine	-114	-14.6%	-172	-20.5%	-162	-19.6%	-114	-14.6%
General Pediatrics	30	10.7%	9	3.1%	17	5.7%	30	10.7%

Non-Primary Care Specialties

Figure 16 – Projected Difference Between Physician Supply and Demand in Finger Lakes in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	9	7.8%	-11	-7.7%	4	3.4%	15	13.5%
Other Internal Medicine Subspecialties	129	25.9%	45	7.8%	100	19.0%	154	32.5%
Obstetrics and Gynecology	17	9.2%	3	1.7%	8	4.2%	26	15.0%
Pathology	-34	-31.5%	-53	-41.4%	-41	-35.4%	-29	-27.9%
25% Primary Care/75% Non-Primary Care								
Cardiology	9	7.5%	-11	-8.0%	4	3.1%	15	13.1%
Other Internal Medicine Subspecialties	127	25.5%	43	7.5%	98	18.7%	152	32.1%
Obstetrics and Gynecology	17	8.9%	3	1.4%	8	3.9%	26	14.6%
Pathology	-35	-31.7%	-53	-41.5%	-41	-35.6%	-29	-28.1%
20% Primary Care/80% Non-Primary Care								
Cardiology	9	7.3%	-11	-8.1%	4	2.9%	15	12.9%
Other Internal Medicine Subspecialties	126	25.2%	42	7.3%	97	18.4%	151	31.8%
Obstetrics and Gynecology	16	8.7%	2	1.2%	7	3.7%	25	14.4%
Pathology	-35	-31.9%	-53	-41.6%	-41	-35.8%	-29	-28.3%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	1	0.6%	-20	-13.9%	-4	-3.5%	7	5.9%
Other Internal Medicine Subspecialties	83	16.7%	-1	-0.1%	54	10.3%	108	22.8%
Obstetrics and Gynecology	3	1.7%	-11	-5.3%	-6	-3.0%	12	7.0%
Pathology	-39	-35.7%	-57	-45.0%	-46	-39.4%	-33	-32.3%
25% Primary Care/75% Non-Primary Care								
Cardiology	0	0.3%	-20	-14.1%	-5	-3.8%	6	5.6%
Other Internal Medicine Subspecialties	81	16.3%	-2	-0.4%	53	10.0%	106	22.4%
Obstetrics and Gynecology	3	1.4%	-11	-5.6%	-6	-3.3%	12	6.7%
Pathology	-39	-35.9%	-57	-45.1%	-46	-39.6%	-34	-32.5%
20% Primary Care/80% Non-Primary Care								
Cardiology	0	0.1%	-20	-14.3%	-5	-4.0%	6	5.4%
Other Internal Medicine Subspecialties	80	16.1%	-3	-0.6%	52	9.8%	105	22.2%
Obstetrics and Gynecology	2	1.2%	-11	-5.8%	-7	-3.5%	12	6.5%
Pathology	-39	-36.0%	-58	-45.2%	-46	-39.7%	-34	-32.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-36	-17.1%	-71	-29.0%	-46	-20.9%	-25	-12.7%
Anesthesiology	-10	-3.9%	-53	-17.7%	-24	-8.9%	3	1.1%
Radiology	7	3.1%	-32	-11.7%	-7	-2.7%	19	8.6%
Emergency Medicine	83	53.5%	72	43.0%	90	61.2%	91	61.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-37	-17.3%	-72	-29.2%	-47	-21.1%	-26	-13.0%
Anesthesiology	-11	-4.2%	-53	-18.0%	-25	-9.2%	2	0.8%
Radiology	7	2.8%	-32	-12.0%	-7	-3.0%	18	8.2%
Emergency Medicine	82	53.1%	71	42.5%	90	60.8%	90	61.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-37	-17.5%	-72	-29.3%	-47	-21.3%	-26	-13.1%
Anesthesiology	-11	-4.4%	-54	-18.1%	-25	-9.3%	2	0.7%
Radiology	6	2.6%	-33	-12.1%	-8	-3.2%	18	8.0%
Emergency Medicine	82	52.8%	70	42.3%	89	60.5%	90	60.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-51	-24.3%	-87	-35.2%	-62	-27.8%	-41	-20.4%
Anesthesiology	-23	-9.0%	-66	-22.1%	-37	-13.8%	-10	-4.3%
Radiology	-5	-2.0%	-44	-16.1%	-19	-7.6%	7	3.2%
Emergency Medicine	69	44.5%	58	34.6%	76	51.8%	77	52.1%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-52	-24.6%	-87	-35.4%	-62	-28.0%	-41	-20.6%
Anesthesiology	-24	-9.3%	-67	-22.4%	-38	-14.0%	-11	-4.6%
Radiology	-5	-2.3%	-44	-16.3%	-19	-7.8%	6	2.9%
Emergency Medicine	68	44.1%	57	34.2%	76	51.3%	76	51.7%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-52	-24.7%	-88	-35.5%	-62	-28.2%	-42	-20.8%
Anesthesiology	-24	-9.5%	-67	-22.5%	-38	-14.2%	-11	-4.7%
Radiology	-6	-2.5%	-45	-16.5%	-20	-8.0%	6	2.7%
Emergency Medicine	68	43.8%	56	33.9%	75	51.1%	76	51.4%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	6	3.9%	-18	-11.0%	-2	-1.4%	13	9.4%
Ophthalmology	-31	-32.3%	-48	-42.0%	-33	-33.6%	-26	-28.7%
Otolaryngology	-6	-12.2%	-13	-24.8%	-8	-15.7%	-3	-7.6%
Orthopedic Surgery	-4	-2.7%	-28	-16.7%	-13	-8.5%	3	2.4%
25% Primary Care/75% Non-Primary Care								
General Surgery	5	3.6%	-19	-11.3%	-3	-1.7%	12	9.1%
Ophthalmology	-31	-32.5%	-48	-42.2%	-34	-33.8%	-27	-28.9%
Otolaryngology	-6	-12.5%	-13	-25.1%	-8	-16.0%	-3	-7.9%
Orthopedic Surgery	-4	-3.0%	-28	-16.9%	-13	-8.8%	3	2.1%
20% Primary Care/80% Non-Primary Care								
General Surgery	5	3.4%	-19	-11.4%	-3	-1.9%	12	8.9%
Ophthalmology	-32	-32.6%	-48	-42.3%	-34	-34.0%	-27	-29.0%
Otolaryngology	-6	-12.7%	-14	-25.2%	-8	-16.1%	-4	-8.1%
Orthopedic Surgery	-5	-3.2%	-29	-17.1%	-14	-9.0%	3	1.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-3	-2.5%	-27	-16.5%	-11	-7.5%	4	2.7%
Ophthalmology	-35	-35.6%	-51	-44.9%	-37	-36.9%	-30	-32.2%
Otolaryngology	-8	-17.5%	-16	-29.3%	-10	-20.7%	-6	-13.1%
Orthopedic Surgery	-11	-7.4%	-35	-20.7%	-20	-13.0%	-3	-2.5%
25% Primary Care/75% Non-Primary Care								
General Surgery	-4	-2.8%	-28	-16.7%	-12	-7.7%	3	2.4%
Ophthalmology	-35	-35.8%	-51	-45.0%	-37	-37.1%	-30	-32.5%
Otolaryngology	-8	-17.7%	-16	-29.5%	-10	-21.0%	-6	-13.4%
Orthopedic Surgery	-11	-7.7%	-35	-20.9%	-20	-13.2%	-4	-2.8%
20% Primary Care/80% Non-Primary Care								
General Surgery	-4	-2.9%	-28	-16.9%	-12	-7.9%	3	2.2%
Ophthalmology	-35	-35.9%	-51	-45.1%	-37	-37.3%	-30	-32.6%
Otolaryngology	-8	-17.9%	-16	-29.7%	-10	-21.1%	-6	-13.5%
Orthopedic Surgery	-11	-7.9%	-35	-21.1%	-20	-13.4%	-4	-3.0%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-16	-32.0%	-24	-41.8%	-18	-35.6%	-13	-28.4%
Other Surgical Subspecialties	-14	-24.0%	-24	-34.9%	-17	-27.6%	-11	-20.0%
Other Specialties	-24	-6.0%	-91	-19.5%	-44	-10.4%	-4	-1.1%
25% Primary Care/75% Non-Primary Care								
Urology	-16	-32.2%	-24	-42.0%	-19	-35.8%	-13	-28.7%
Other Surgical Subspecialties	-14	-24.2%	-24	-35.1%	-17	-27.8%	-11	-20.2%
Other Specialties	-25	-6.3%	-93	-19.8%	-45	-10.6%	-5	-1.4%
20% Primary Care/80% Non-Primary Care								
Urology	-16	-32.3%	-24	-42.1%	-19	-35.9%	-13	-28.8%
Other Surgical Subspecialties	-14	-24.3%	-24	-35.2%	-17	-27.9%	-11	-20.4%
Other Specialties	-26	-6.5%	-93	-19.9%	-45	-10.8%	-6	-1.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-17	-35.2%	-25	-44.5%	-20	-38.6%	-15	-31.8%
Other Surgical Subspecialties	-16	-28.3%	-26	-38.6%	-19	-31.7%	-14	-24.6%
Other Specialties	-49	-12.2%	-116	-24.8%	-68	-16.2%	-29	-7.5%
25% Primary Care/75% Non-Primary Care								
Urology	-17	-35.4%	-26	-44.7%	-20	-38.8%	-15	-32.0%
Other Surgical Subspecialties	-17	-28.6%	-26	-38.8%	-19	-32.0%	-14	-24.8%
Other Specialties	-50	-12.4%	-117	-25.0%	-69	-16.4%	-30	-7.8%
20% Primary Care/80% Non-Primary Care								
Urology	-17	-35.5%	-26	-44.8%	-20	-38.9%	-15	-32.2%
Other Surgical Subspecialties	-17	-28.7%	-26	-38.9%	-20	-32.1%	-14	-24.9%
Other Specialties	-50	-12.6%	-118	-25.1%	-70	-16.6%	-30	-8.0%

Relationship between Physician Supply and Demand in Hudson Valley 2030

Hudson Valley Supply Scenario 1: Baseline

Figure 1 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>All Physicians</i>	-438	-4.6%	-1,658	-15.6%	-898	-9.1%	-124	-1.4%
Supply responsive to demand								
<i>All Physicians</i>	-492	-5.2%	-1,713	-16.1%	-952	-9.6%	-179	-2.0%

Figure 2 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care</i>	-225	-7.1%	-457	-13.5%	-391	-11.8%	-225	-7.1%
<i>Non-Primary Care</i>	-213	-3.4%	-1,201	-16.6%	-507	-7.7%	101	1.7%
Supply responsive to demand								
<i>Primary Care</i>	-226	-7.2%	-458	-13.6%	-392	-11.8%	-226	-7.2%
<i>Non-Primary Care</i>	-266	-4.2%	-1,254	-17.3%	-560	-8.5%	47	0.8%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 3 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Primary Care (Overall)	-225	-7.1%	-457	-13.5%	-391	-11.8%	-225	-7.1%
General/Family Medicine	-87	-13.6%	-134	-19.5%	-108	-16.4%	-87	-13.6%
General Internal Medicine	-222	-12.2%	-356	-18.2%	-333	-17.2%	-222	-12.2%
General Pediatrics	83	12.1%	33	4.4%	50	7.0%	83	12.1%
Supply responsive to demand								
Primary Care (Overall)	-226	-7.2%	-458	-13.6%	-392	-11.8%	-226	-7.2%
General/Family Medicine	-67	-10.5%	-114	-16.7%	-89	-13.5%	-67	-10.5%
General Internal Medicine	-244	-13.4%	-378	-19.3%	-355	-18.4%	-244	-13.4%
General Pediatrics	85	12.4%	34	4.6%	52	7.2%	85	12.4%

Non-Primary Care Specialties

Figure 4 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Cardiology	13	4.8%	-34	-10.3%	1	0.5%	27	10.3%
Other Internal Medicine Subspecialties	228	21.8%	52	4.3%	168	15.2%	280	28.2%
Obstetrics and Gynecology	12	2.8%	-19	-4.3%	-8	-1.9%	32	8.2%
Pathology	-66	-34.0%	-98	-43.5%	-77	-37.8%	-56	-30.5%
Supply responsive to demand								
Cardiology	9	3.1%	-38	-11.7%	-3	-1.2%	23	8.5%
Other Internal Medicine Subspecialties	204	19.5%	29	2.4%	144	13.0%	256	25.8%
Obstetrics and Gynecology	17	4.2%	-13	-3.0%	-3	-0.6%	38	9.7%
Pathology	-66	-34.1%	-98	-43.6%	-78	-37.9%	-56	-30.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Psychiatry	-187	-20.8%	-338	-32.2%	-230	-24.5%	-142	-16.6%
Anesthesiology	-33	-6.5%	-116	-20.0%	-60	-11.4%	-8	-1.6%
Radiology	3	0.7%	-69	-13.8%	-23	-5.1%	24	6.0%
Emergency Medicine	123	48.0%	104	37.9%	135	55.5%	136	55.8%
Supply responsive to demand								
Psychiatry	-202	-22.5%	-353	-33.6%	-245	-26.1%	-157	-18.4%
Anesthesiology	-34	-6.8%	-117	-20.2%	-61	-11.6%	-9	-1.9%
Radiology	2	0.4%	-70	-14.0%	-24	-5.3%	23	5.7%
Emergency Medicine	123	48.1%	104	37.9%	135	55.5%	136	55.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
General Surgery	2	0.7%	-50	-13.7%	-15	-4.4%	18	6.0%
Ophthalmology	-101	-33.5%	-151	-43.0%	-107	-34.8%	-86	-30.0%
Otolaryngology	-16	-14.3%	-35	-26.6%	-21	-17.7%	-11	-9.8%
Orthopedic Surgery	-13	-5.8%	-52	-19.3%	-28	-11.4%	-2	-0.8%
Supply responsive to demand								
General Surgery	0	-0.1%	-53	-14.4%	-17	-5.2%	15	5.2%
Ophthalmology	-102	-34.1%	-153	-43.5%	-109	-35.4%	-87	-30.6%
Otolaryngology	-17	-15.4%	-36	-27.6%	-22	-18.8%	-12	-11.0%
Orthopedic Surgery	-12	-5.1%	-51	-18.8%	-27	-10.8%	0	-0.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Urology	-41	-33.1%	-62	-42.7%	-48	-36.6%	-35	-29.5%
Other Surgical Subspecialties	-44	-26.1%	-72	-36.7%	-52	-29.7%	-35	-22.3%
Other Supecialties	-93	-9.2%	-262	-22.3%	-141	-13.4%	-43	-4.5%
Supply responsive to demand								
Urology	-42	-33.6%	-63	-43.2%	-49	-37.1%	-36	-30.1%
Other Surgical Subspecialties	-44	-26.6%	-72	-37.1%	-53	-30.1%	-36	-22.7%
Other Specialties	-101	-10.0%	-269	-22.9%	-149	-14.1%	-50	-5.3%

Hudson Valley Supply Scenario 2: NP/PA High and Lower Growth

Figure 5 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	693	7.4%	-528	-5.0%	232	2.4%	1,006	11.1%
NP/PA Lower Growth								
<i>All Physicians</i>	162	1.7%	-1,058	-9.9%	-298	-3.0%	476	5.2%
Supply responsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	512	5.4%	-709	-6.7%	51	0.5%	825	9.1%
NP/PA Lower Growth								
<i>All Physicians</i>	-11	-0.1%	-1,232	-11.6%	-471	-4.8%	302	3.3%

Figure 6 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care	261	8.3%	29	0.8%	95	2.9%	261	8.3%
Non-Primary Care	432	6.9%	-556	-7.7%	138	2.1%	745	12.5%
NP/PA Lower Growth								
Primary Care	8	0.3%	-224	-6.6%	-158	-4.8%	8	0.3%
Non-Primary Care	154	2.5%	-834	-11.5%	-140	-2.1%	467	7.8%
Supply responsive to demand								
NP/PA High Growth								
Primary Care	263	8.3%	30	0.9%	96	2.9%	263	8.3%
Non-Primary Care	249	4.0%	-739	-10.2%	-45	-0.7%	563	9.4%
NP/PA Lower Growth								
Primary Care	10	0.3%	-222	-6.6%	-156	-4.7%	10	0.3%
Non-Primary Care	-21	-0.3%	-1,010	-13.9%	-315	-4.8%	292	4.9%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 7 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>Primary Care (Overall)</i>	261	8.3%	29	0.8%	95	2.9%	261	8.3%
<i>General/Family Medicine</i>	5	0.8%	-42	-6.1%	-17	-2.5%	5	0.8%
<i>General Internal Medicine</i>	45	2.4%	-90	-4.6%	-67	-3.5%	45	2.4%
<i>General Pediatrics</i>	211	30.8%	160	21.8%	178	24.8%	211	30.8%
NP/PA Lower Growth								
<i>Primary Care (Overall)</i>	8	0.3%	-224	-6.6%	-158	-4.8%	8	0.3%
<i>General/Family Medicine</i>	-43	-6.7%	-90	-13.1%	-64	-9.7%	-43	-6.7%
<i>General Internal Medicine</i>	-94	-5.1%	-228	-11.7%	-205	-10.6%	-94	-5.1%
<i>General Pediatrics</i>	145	21.1%	94	12.8%	112	15.6%	145	21.1%
Supply responsive to demand								
NP/PA High Growth								
<i>Primary Care (Overall)</i>	263	8.3%	30	0.9%	96	2.9%	263	8.3%
<i>General/Family Medicine</i>	28	4.4%	-19	-2.8%	7	1.0%	28	4.4%
<i>General Internal Medicine</i>	21	1.1%	-114	-5.8%	-91	-4.7%	21	1.1%
<i>General Pediatrics</i>	214	31.2%	163	22.2%	181	25.2%	214	31.2%
NP/PA Lower Growth								
<i>Primary Care (Overall)</i>	10	0.3%	-222	-6.6%	-156	-4.7%	10	0.3%
<i>General/Family Medicine</i>	-21	-3.3%	-68	-9.9%	-43	-6.5%	-21	-3.3%
<i>General Internal Medicine</i>	-116	-6.4%	-250	-12.8%	-228	-11.8%	-116	-6.4%
<i>General Pediatrics</i>	147	21.5%	97	13.1%	114	15.9%	147	21.5%

Non-Primary Care Specialties

Figure 8 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Cardiology	45	15.9%	-2	-0.7%	33	11.2%	59	22.1%
Other Internal Medicine Subspecialties	363	34.7%	188	15.4%	303	27.4%	415	41.8%
Obstetrics and Gynecology	57	13.7%	26	5.9%	37	8.5%	77	19.7%
Pathology	-52	-26.9%	-84	-37.4%	-64	-31.1%	-42	-23.1%
NP/PA Lower Growth								
Cardiology	31	11.1%	-16	-4.8%	19	6.6%	45	17.0%
Other Internal Medicine Subspecialties	305	29.1%	129	10.6%	245	22.1%	357	35.9%
Obstetrics and Gynecology	37	9.0%	7	1.5%	17	4.0%	58	14.8%
Pathology	-58	-30.0%	-90	-40.0%	-70	-34.0%	-48	-26.3%
Supply responsive to demand								
NP/PA High Growth								
Cardiology	33	11.9%	-14	-4.2%	21	7.3%	47	17.8%
Other Internal Medicine Subspecialties	311	29.8%	136	11.1%	251	22.7%	364	36.6%
Obstetrics and Gynecology	54	13.1%	24	5.4%	34	7.9%	75	19.1%
Pathology	-55	-28.5%	-87	-38.8%	-67	-32.6%	-45	-24.7%
NP/PA Lower Growth								
Cardiology	20	7.3%	-27	-8.2%	8	2.8%	34	12.9%
Other Internal Medicine Subspecialties	255	24.4%	80	6.5%	195	17.7%	307	31.0%
Obstetrics and Gynecology	35	8.4%	4	1.0%	15	3.5%	56	14.1%
Pathology	-61	-31.5%	-93	-41.3%	-72	-35.4%	-51	-27.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Psychiatry	-111	-12.4%	-262	-25.0%	-155	-16.4%	-66	-7.8%
Anesthesiology	17	3.4%	-66	-11.4%	-10	-1.9%	42	8.9%
Radiology	49	11.4%	-23	-4.6%	23	5.0%	70	17.2%
Emergency Medicine	163	63.8%	144	52.5%	176	72.0%	176	72.4%
NP/PA Lower Growth								
Psychiatry	-144	-16.0%	-294	-28.1%	-187	-19.9%	-99	-11.6%
Anesthesiology	-4	-0.9%	-88	-15.1%	-32	-6.0%	21	4.3%
Radiology	29	6.8%	-43	-8.6%	3	0.7%	50	12.4%
Emergency Medicine	146	57.0%	127	46.2%	158	64.9%	159	65.3%
Supply responsive to demand								
NP/PA High Growth								
Psychiatry	-142	-15.8%	-293	-27.9%	-186	-19.7%	-97	-11.4%
Anesthesiology	6	1.2%	-78	-13.4%	-21	-4.1%	31	6.5%
Radiology	39	9.0%	-33	-6.6%	13	2.8%	60	14.8%
Emergency Medicine	156	60.8%	137	49.7%	168	68.9%	168	69.2%
NP/PA Lower Growth								
Psychiatry	-174	-19.3%	-324	-30.9%	-217	-23.0%	-129	-15.1%
Anesthesiology	-15	-3.0%	-99	-16.9%	-42	-8.0%	10	2.1%
Radiology	19	4.5%	-53	-10.5%	-7	-1.4%	41	10.0%
Emergency Medicine	139	54.1%	120	43.5%	151	61.9%	151	62.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
General Surgery	36	11.5%	-17	-4.6%	19	5.7%	51	17.3%
Ophthalmology	-79	-26.4%	-130	-37.0%	-86	-27.9%	-64	-22.5%
Otolaryngology	-6	-5.2%	-25	-18.8%	-11	-9.0%	0	-0.2%
Orthopedic Surgery	10	4.2%	-29	-10.7%	-5	-2.0%	21	9.7%
NP/PA Lower Growth								
General Surgery	21	6.8%	-31	-8.5%	4	1.3%	37	12.4%
Ophthalmology	-89	-29.4%	-139	-39.6%	-95	-30.9%	-74	-25.7%
Otolaryngology	-10	-9.2%	-29	-22.2%	-15	-12.7%	-5	-4.4%
Orthopedic Surgery	0	-0.1%	-39	-14.4%	-15	-6.1%	11	5.2%
Supply responsive to demand								
NP/PA High Growth								
General Surgery	27	8.5%	-26	-7.1%	10	3.0%	42	14.2%
Ophthalmology	-85	-28.4%	-136	-38.7%	-92	-29.8%	-70	-24.6%
Otolaryngology	-9	-8.2%	-28	-21.4%	-14	-11.8%	-4	-3.3%
Orthopedic Surgery	7	3.0%	-32	-11.8%	-8	-3.2%	19	8.4%
NP/PA Lower Growth								
General Surgery	13	4.0%	-40	-10.9%	-4	-1.3%	28	9.5%
Ophthalmology	-94	-31.4%	-145	-41.2%	-101	-32.8%	-79	-27.8%
Otolaryngology	-14	-12.0%	-32	-24.6%	-18	-15.4%	-8	-7.3%
Orthopedic Surgery	-3	-1.3%	-42	-15.4%	-18	-7.2%	9	3.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Urology	-32	-25.9%	-53	-36.6%	-39	-29.8%	-26	-22.0%
Other Surgical Subspecialties	-31	-18.3%	-59	-30.0%	-39	-22.2%	-22	-14.0%
Other Specialties	4	0.4%	-164	-14.0%	-44	-4.2%	55	5.7%
NP/PA Lower Growth								
Urology	-36	-29.0%	-57	-39.2%	-43	-32.7%	-30	-25.3%
Other Surgical Subspecialties	-36	-21.7%	-64	-32.9%	-45	-25.4%	-28	-17.5%
Other Specialties	-38	-3.7%	-206	-17.6%	-86	-8.2%	13	1.3%
Supply responsive to demand								
NP/PA High Growth								
Urology	-35	-27.9%	-56	-38.3%	-42	-31.7%	-29	-24.1%
Other Surgical Subspecialties	-34	-20.3%	-62	-31.7%	-42	-24.1%	-26	-16.1%
Other Specialties	-23	-2.3%	-192	-16.3%	-71	-6.8%	27	2.9%
NP/PA Lower Growth								
Urology	-39	-30.9%	-60	-40.8%	-46	-34.6%	-32	-27.3%
Other Surgical Subspecialties	-39	-23.6%	-67	-34.6%	-48	-27.2%	-31	-19.6%
Other Specialties	-64	-6.3%	-232	-19.8%	-112	-10.6%	-13	-1.4%

Hudson Valley Supply Scenario 3a: Increased Retention of Physicians

Figure 9 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-218	-2.3%	-1,439	-13.5%	-679	-6.9%	95	1.0%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-218	-2.3%	-1,439	-13.5%	-679	-6.9%	95	1.0%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-218	-2.3%	-1,439	-13.5%	-679	-6.9%	95	1.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-277	-2.9%	-1,497	-14.1%	-737	-7.5%	36	0.4%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-277	-2.9%	-1,497	-14.1%	-737	-7.5%	36	0.4%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-277	-2.9%	-1,497	-14.1%	-737	-7.5%	36	0.4%

Figure 10 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-152	-4.8%	-384	-11.4%	-318	-9.6%	-152	-4.8%
Non-Primary Care	-67	-1.1%	-1,055	-14.5%	-361	-5.5%	247	4.1%
25% Primary Care/75% Non-Primary Care								
Primary Care	-170	-5.4%	-402	-11.9%	-336	-10.1%	-170	-5.4%
Non-Primary Care	-48	-0.8%	-1,037	-14.3%	-342	-5.2%	265	4.5%
20% Primary Care/80% Non-Primary Care								
Primary Care	-181	-5.8%	-413	-12.2%	-347	-10.5%	-181	-5.8%
Non-Primary Care	-37	-0.6%	-1,026	-14.1%	-331	-5.1%	276	4.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-155	-4.9%	-387	-11.4%	-321	-9.7%	-155	-4.9%
Non-Primary Care	-122	-2.0%	-1,111	-15.3%	-416	-6.3%	191	3.2%
25% Primary Care/75% Non-Primary Care								
Primary Care	-172	-5.5%	-404	-12.0%	-339	-10.2%	-172	-5.5%
Non-Primary Care	-105	-1.7%	-1,093	-15.1%	-399	-6.1%	209	3.5%
20% Primary Care/80% Non-Primary Care								
Primary Care	-183	-5.8%	-415	-12.3%	-349	-10.5%	-183	-5.8%
Non-Primary Care	-94	-1.5%	-1,082	-14.9%	-388	-5.9%	220	3.7%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 11 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-152	-4.8%	-384	-11.4%	-318	-9.6%	-152	-4.8%
General/Family Medicine	-73	-11.4%	-120	-17.5%	-94	-14.3%	-73	-11.4%
General Internal Medicine	-182	-10.0%	-316	-16.1%	-293	-15.2%	-182	-10.0%
General Pediatrics	102	14.9%	52	7.0%	70	9.7%	102	14.9%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-170	-5.4%	-402	-11.9%	-336	-10.1%	-170	-5.4%
General/Family Medicine	-76	-11.9%	-123	-18.0%	-98	-14.8%	-76	-11.9%
General Internal Medicine	-191	-10.5%	-326	-16.7%	-303	-15.7%	-191	-10.5%
General Pediatrics	98	14.2%	47	6.4%	65	9.0%	98	14.2%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-181	-5.8%	-413	-12.2%	-347	-10.5%	-181	-5.8%
General/Family Medicine	-78	-12.3%	-125	-18.3%	-100	-15.1%	-78	-12.3%
General Internal Medicine	-198	-10.8%	-332	-17.0%	-309	-16.0%	-198	-10.8%
General Pediatrics	95	13.8%	44	6.0%	62	8.6%	95	13.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-155	-4.9%	-387	-11.4%	-321	-9.7%	-155	-4.9%
General/Family Medicine	-53	-8.4%	-100	-14.6%	-75	-11.4%	-53	-8.4%
General Internal Medicine	-205	-11.2%	-339	-17.3%	-317	-16.4%	-205	-11.2%
General Pediatrics	104	15.1%	53	7.2%	71	9.9%	104	15.1%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-172	-5.5%	-404	-12.0%	-339	-10.2%	-172	-5.5%
General/Family Medicine	-57	-8.9%	-104	-15.2%	-78	-11.9%	-57	-8.9%
General Internal Medicine	-215	-11.8%	-349	-17.8%	-326	-16.9%	-215	-11.8%
General Pediatrics	99	14.4%	48	6.6%	66	9.2%	99	14.4%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-183	-5.8%	-415	-12.3%	-349	-10.5%	-183	-5.8%
General/Family Medicine	-59	-9.2%	-106	-15.5%	-80	-12.2%	-59	-9.2%
General Internal Medicine	-220	-12.1%	-355	-18.1%	-332	-17.2%	-220	-12.1%
General Pediatrics	96	14.0%	46	6.2%	63	8.8%	96	14.0%

Non-Primary Care Specialties

Figure 12 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	20	7.3%	-26	-8.1%	9	2.9%	34	13.0%
Other Internal Medicine Subspecialties	258	24.7%	83	6.8%	198	17.9%	311	31.3%
Obstetrics and Gynecology	22	5.3%	-9	-1.9%	2	0.4%	42	10.8%
Pathology	-63	-32.4%	-95	-42.1%	-74	-36.2%	-53	-28.8%
25% Primary Care/75% Non-Primary Care								
Cardiology	21	7.6%	-26	-7.8%	9	3.2%	35	13.3%
Other Internal Medicine Subspecialties	262	25.1%	87	7.1%	202	18.3%	314	31.7%
Obstetrics and Gynecology	23	5.6%	-7	-1.7%	3	0.7%	44	11.2%
Pathology	-62	-32.2%	-94	-41.9%	-74	-36.1%	-52	-28.6%
20% Primary Care/80% Non-Primary Care								
Cardiology	22	7.8%	-25	-7.7%	10	3.4%	36	13.5%
Other Internal Medicine Subspecialties	264	25.3%	89	7.3%	204	18.5%	317	31.9%
Obstetrics and Gynecology	24	5.8%	-7	-1.5%	4	0.9%	45	11.3%
Pathology	-62	-32.1%	-94	-41.8%	-74	-35.9%	-52	-28.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	15	5.5%	-32	-9.6%	3	1.2%	29	11.1%
Other Internal Medicine Subspecialties	234	22.4%	59	4.8%	174	15.7%	286	28.8%
Obstetrics and Gynecology	28	6.7%	-3	-0.6%	8	1.8%	48	12.3%
Pathology	-63	-32.6%	-95	-42.3%	-75	-36.4%	-53	-29.0%
25% Primary Care/75% Non-Primary Care								
Cardiology	16	5.8%	-31	-9.4%	4	1.5%	30	11.4%
Other Internal Medicine Subspecialties	238	22.7%	62	5.1%	178	16.1%	290	29.2%
Obstetrics and Gynecology	29	7.0%	-2	-0.4%	9	2.1%	50	12.6%
Pathology	-62	-32.4%	-95	-42.1%	-74	-36.2%	-53	-28.8%
20% Primary Care/80% Non-Primary Care								
Cardiology	17	6.0%	-30	-9.2%	5	1.7%	31	11.6%
Other Internal Medicine Subspecialties	240	23.0%	65	5.3%	180	16.3%	292	29.4%
Obstetrics and Gynecology	30	7.2%	-1	-0.2%	10	2.2%	50	12.8%
Pathology	-62	-32.3%	-95	-42.0%	-74	-36.1%	-53	-28.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-170	-18.9%	-320	-30.6%	-213	-22.6%	-125	-14.6%
Anesthesiology	-21	-4.3%	-105	-18.0%	-49	-9.2%	4	0.8%
Radiology	13	3.1%	-59	-11.7%	-13	-2.8%	35	8.5%
Emergency Medicine	132	51.6%	113	41.2%	144	59.2%	145	59.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-168	-18.7%	-318	-30.3%	-211	-22.4%	-123	-14.4%
Anesthesiology	-20	-4.0%	-103	-17.8%	-47	-9.0%	5	1.1%
Radiology	15	3.4%	-57	-11.5%	-11	-2.5%	36	8.8%
Emergency Medicine	133	52.1%	114	41.6%	146	59.7%	146	60.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-166	-18.5%	-317	-30.2%	-210	-22.3%	-121	-14.2%
Anesthesiology	-19	-3.8%	-103	-17.6%	-46	-8.8%	6	1.2%
Radiology	15	3.6%	-57	-11.3%	-11	-2.3%	37	9.0%
Emergency Medicine	134	52.3%	115	41.9%	146	60.0%	147	60.3%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-185	-20.6%	-336	-32.0%	-229	-24.3%	-140	-16.5%
Anesthesiology	-23	-4.6%	-106	-18.3%	-50	-9.5%	2	0.4%
Radiology	12	2.8%	-60	-11.9%	-14	-3.0%	34	8.2%
Emergency Medicine	132	51.6%	113	41.2%	144	59.3%	145	59.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-183	-20.4%	-334	-31.8%	-227	-24.1%	-138	-16.2%
Anesthesiology	-21	-4.3%	-105	-18.1%	-49	-9.3%	3	0.7%
Radiology	13	3.1%	-59	-11.7%	-12	-2.7%	35	8.5%
Emergency Medicine	133	52.1%	114	41.6%	146	59.7%	146	60.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-182	-20.3%	-333	-31.7%	-225	-23.9%	-137	-16.1%
Anesthesiology	-21	-4.1%	-104	-17.9%	-48	-9.1%	4	0.9%
Radiology	14	3.3%	-58	-11.5%	-12	-2.6%	36	8.7%
Emergency Medicine	134	52.3%	115	41.9%	146	60.0%	147	60.3%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	10	3.2%	-42	-11.7%	-7	-2.1%	25	8.6%
Ophthalmology	-96	-31.9%	-146	-41.6%	-102	-33.2%	-81	-28.3%
Otolaryngology	-14	-12.3%	-33	-24.9%	-19	-15.7%	-8	-7.7%
Orthopedic Surgery	-8	-3.5%	-47	-17.4%	-23	-9.3%	3	1.6%
25% Primary Care/75% Non-Primary Care								
General Surgery	11	3.5%	-42	-11.4%	-6	-1.8%	26	8.9%
Ophthalmology	-95	-31.7%	-146	-41.5%	-102	-33.0%	-80	-28.1%
Otolaryngology	-14	-12.0%	-33	-24.7%	-18	-15.5%	-8	-7.4%
Orthopedic Surgery	-7	-3.2%	-46	-17.1%	-22	-9.0%	4	1.9%
20% Primary Care/80% Non-Primary Care								
General Surgery	11	3.6%	-41	-11.2%	-5	-1.7%	27	9.1%
Ophthalmology	-95	-31.5%	-145	-41.4%	-101	-32.9%	-80	-27.9%
Otolaryngology	-13	-11.9%	-32	-24.5%	-18	-15.3%	-8	-7.2%
Orthopedic Surgery	-7	-3.1%	-46	-17.0%	-22	-8.9%	5	2.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	7	2.3%	-45	-12.4%	-10	-2.9%	23	7.7%
Ophthalmology	-98	-32.5%	-148	-42.2%	-104	-33.8%	-83	-28.9%
Otolaryngology	-15	-13.4%	-34	-25.8%	-20	-16.8%	-9	-8.8%
Orthopedic Surgery	-7	-2.9%	-46	-16.8%	-21	-8.7%	5	2.2%
25% Primary Care/75% Non-Primary Care								
General Surgery	8	2.6%	-44	-12.1%	-9	-2.6%	24	8.0%
Ophthalmology	-97	-32.3%	-148	-42.0%	-103	-33.7%	-82	-28.7%
Otolaryngology	-15	-13.2%	-34	-25.6%	-19	-16.6%	-9	-8.6%
Orthopedic Surgery	-6	-2.6%	-45	-16.6%	-21	-8.4%	6	2.5%
20% Primary Care/80% Non-Primary Care								
General Surgery	9	2.8%	-44	-12.0%	-8	-2.5%	24	8.2%
Ophthalmology	-97	-32.2%	-147	-41.9%	-103	-33.5%	-82	-28.6%
Otolaryngology	-15	-13.0%	-34	-25.5%	-19	-16.4%	-9	-8.4%
Orthopedic Surgery	-6	-2.4%	-45	-16.4%	-20	-8.3%	6	2.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-39	-31.4%	-60	-41.3%	-46	-35.0%	-33	-27.8%
Other Surgical Subspecialties	-41	-24.4%	-69	-35.2%	-49	-28.0%	-32	-20.4%
Other Specialties	-71	-7.1%	-240	-20.4%	-119	-11.3%	-21	-2.2%
25% Primary Care/75% Non-Primary Care								
Urology	-39	-31.2%	-60	-41.1%	-46	-34.9%	-33	-27.6%
Other Surgical Subspecialties	-40	-24.1%	-68	-35.0%	-49	-27.8%	-32	-20.1%
Other Specialties	-68	-6.8%	-237	-20.2%	-117	-11.1%	-18	-1.9%
20% Primary Care/80% Non-Primary Care								
Urology	-39	-31.1%	-60	-41.0%	-46	-34.7%	-33	-27.5%
Other Surgical Subspecialties	-40	-24.0%	-68	-34.9%	-48	-27.6%	-32	-20.0%
Other Specialties	-67	-6.6%	-235	-20.0%	-115	-10.9%	-16	-1.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-40	-32.0%	-61	-41.8%	-47	-35.6%	-34	-28.5%
Other Surgical Subspecialties	-41	-24.8%	-69	-35.6%	-50	-28.4%	-33	-20.9%
Other Specialties	-79	-7.8%	-248	-21.1%	-127	-12.1%	-29	-3.0%
25% Primary Care/75% Non-Primary Care								
Urology	-40	-31.9%	-61	-41.6%	-47	-35.4%	-34	-28.3%
Other Surgical Subspecialties	-41	-24.6%	-69	-35.4%	-49	-28.2%	-33	-20.6%
Other Specialties	-76	-7.6%	-245	-20.9%	-125	-11.8%	-26	-2.7%
20% Primary Care/80% Non-Primary Care								
Urology	-40	-31.7%	-61	-41.5%	-47	-35.3%	-33	-28.1%
Other Surgical Subspecialties	-41	-24.5%	-69	-35.3%	-49	-28.1%	-33	-20.5%
Other Specialties	-75	-7.4%	-243	-20.7%	-123	-11.7%	-24	-2.5%

Hudson Valley Supply Scenario 3b: Decreased Retention of Physicians

Figure 13 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-657	-7.0%	-1,877	-17.7%	-1,117	-11.3%	-343	-3.8%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-657	-7.0%	-1,877	-17.7%	-1,117	-11.3%	-343	-3.8%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-657	-7.0%	-1,877	-17.7%	-1,117	-11.3%	-343	-3.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-707	-7.5%	-1,928	-18.1%	-1,167	-11.8%	-394	-4.3%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-707	-7.5%	-1,928	-18.1%	-1,167	-11.8%	-394	-4.3%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-707	-7.5%	-1,928	-18.1%	-1,167	-11.8%	-394	-4.3%

Figure 14 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-298	-9.5%	-530	-15.7%	-464	-14.0%	-298	-9.5%
Non-Primary Care	-359	-5.7%	-1,347	-18.6%	-653	-10.0%	-46	-0.8%
25% Primary Care/75% Non-Primary Care								
Primary Care	-280	-8.9%	-512	-15.1%	-446	-13.5%	-280	-8.9%
Non-Primary Care	-377	-6.0%	-1,366	-18.8%	-671	-10.2%	-64	-1.1%
20% Primary Care/80% Non-Primary Care								
Primary Care	-269	-8.5%	-501	-14.8%	-435	-13.1%	-269	-8.5%
Non-Primary Care	-388	-6.2%	-1,377	-19.0%	-682	-10.4%	-75	-1.3%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-298	-9.5%	-530	-15.7%	-464	-14.0%	-298	-9.5%
Non-Primary Care	-409	-6.5%	-1,398	-19.3%	-703	-10.7%	-96	-1.6%
25% Primary Care/75% Non-Primary Care								
Primary Care	-280	-8.9%	-512	-15.2%	-446	-13.5%	-280	-8.9%
Non-Primary Care	-427	-6.8%	-1,416	-19.5%	-721	-11.0%	-114	-1.9%
20% Primary Care/80% Non-Primary Care								
Primary Care	-269	-8.6%	-501	-14.8%	-435	-13.1%	-269	-8.6%
Non-Primary Care	-438	-7.0%	-1,426	-19.7%	-732	-11.2%	-125	-2.1%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 15 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-298	-9.5%	-530	-15.7%	-464	-14.0%	-298	-9.5%
General/Family Medicine	-100	-15.7%	-147	-21.5%	-122	-18.5%	-100	-15.7%
General Internal Medicine	-262	-14.3%	-396	-20.2%	-373	-19.3%	-262	-14.3%
General Pediatrics	64	9.3%	13	1.8%	31	4.3%	64	9.3%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-280	-8.9%	-512	-15.1%	-446	-13.5%	-280	-8.9%
General/Family Medicine	-97	-15.2%	-144	-21.0%	-119	-18.0%	-97	-15.2%
General Internal Medicine	-252	-13.8%	-386	-19.7%	-363	-18.8%	-252	-13.8%
General Pediatrics	69	10.0%	18	2.5%	36	5.0%	69	10.0%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-269	-8.5%	-501	-14.8%	-435	-13.1%	-269	-8.5%
General/Family Medicine	-95	-14.9%	-142	-20.7%	-116	-17.7%	-95	-14.9%
General Internal Medicine	-246	-13.5%	-380	-19.4%	-357	-18.5%	-246	-13.5%
General Pediatrics	72	10.5%	21	2.9%	39	5.4%	72	10.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-298	-9.5%	-530	-15.7%	-464	-14.0%	-298	-9.5%
General/Family Medicine	-81	-12.7%	-128	-18.7%	-103	-15.6%	-81	-12.7%
General Internal Medicine	-282	-15.5%	-417	-21.3%	-394	-20.4%	-282	-15.5%
General Pediatrics	66	9.6%	15	2.1%	33	4.6%	66	9.6%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-280	-8.9%	-512	-15.2%	-446	-13.5%	-280	-8.9%
General/Family Medicine	-78	-12.2%	-125	-18.2%	-99	-15.1%	-78	-12.2%
General Internal Medicine	-273	-15.0%	-407	-20.8%	-385	-19.9%	-273	-15.0%
General Pediatrics	71	10.3%	20	2.7%	38	5.3%	71	10.3%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-269	-8.6%	-501	-14.8%	-435	-13.1%	-269	-8.6%
General/Family Medicine	-76	-11.9%	-123	-17.9%	-97	-14.7%	-76	-11.9%
General Internal Medicine	-267	-14.6%	-401	-20.5%	-379	-19.6%	-267	-14.6%
General Pediatrics	73	10.7%	23	3.1%	41	5.7%	73	10.7%

Non-Primary Care Specialties

Figure 16 – Projected Difference Between Physician Supply and Demand in Hudson Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	6	2.3%	-41	-12.4%	-6	-1.9%	20	7.6%
Other Internal Medicine Subspecialties	197	18.8%	22	1.8%	137	12.4%	249	25.1%
Obstetrics and Gynecology	1	0.3%	-29	-6.6%	-19	-4.3%	22	5.6%
Pathology	-69	-35.6%	-101	-44.8%	-80	-39.3%	-59	-32.2%
25% Primary Care/75% Non-Primary Care								
Cardiology	5	1.9%	-42	-12.7%	-7	-2.2%	19	7.3%
Other Internal Medicine Subspecialties	193	18.5%	18	1.5%	133	12.0%	245	24.7%
Obstetrics and Gynecology	0	0.0%	-30	-6.9%	-20	-4.6%	21	5.3%
Pathology	-69	-35.8%	-101	-45.0%	-81	-39.4%	-59	-32.4%
20% Primary Care/80% Non-Primary Care								
Cardiology	5	1.8%	-42	-12.9%	-7	-2.4%	19	7.1%
Other Internal Medicine Subspecialties	191	18.2%	15	1.3%	131	11.8%	243	24.5%
Obstetrics and Gynecology	-1	-0.2%	-31	-7.0%	-21	-4.8%	20	5.1%
Pathology	-69	-35.9%	-102	-45.1%	-81	-39.6%	-60	-32.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	2	0.6%	-45	-13.9%	-10	-3.5%	16	5.9%
Other Internal Medicine Subspecialties	174	16.7%	-1	-0.1%	114	10.3%	226	22.8%
Obstetrics and Gynecology	7	1.7%	-23	-5.3%	-13	-3.0%	28	7.1%
Pathology	-69	-35.7%	-101	-45.0%	-81	-39.4%	-59	-32.3%
25% Primary Care/75% Non-Primary Care								
Cardiology	1	0.3%	-46	-14.1%	-11	-3.8%	15	5.6%
Other Internal Medicine Subspecialties	171	16.3%	-5	-0.4%	111	10.0%	223	22.4%
Obstetrics and Gynecology	6	1.4%	-25	-5.6%	-14	-3.3%	26	6.7%
Pathology	-69	-35.9%	-102	-45.1%	-81	-39.6%	-60	-32.5%
20% Primary Care/80% Non-Primary Care								
Cardiology	0	0.1%	-47	-14.3%	-12	-4.0%	14	5.4%
Other Internal Medicine Subspecialties	168	16.1%	-7	-0.6%	108	9.8%	221	22.2%
Obstetrics and Gynecology	5	1.2%	-25	-5.7%	-15	-3.5%	26	6.5%
Pathology	-70	-36.0%	-102	-45.2%	-81	-39.7%	-60	-32.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-204	-22.7%	-355	-33.8%	-247	-26.3%	-159	-18.7%
Anesthesiology	-44	-8.8%	-127	-21.9%	-71	-13.5%	-19	-4.0%
Radiology	-8	-1.8%	-80	-15.9%	-33	-7.4%	14	3.4%
Emergency Medicine	114	44.5%	95	34.5%	126	51.7%	127	52.1%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-206	-23.0%	-357	-34.0%	-250	-26.5%	-161	-18.9%
Anesthesiology	-45	-9.1%	-129	-22.1%	-72	-13.8%	-20	-4.3%
Radiology	-9	-2.1%	-81	-16.1%	-35	-7.6%	13	3.1%
Emergency Medicine	113	44.0%	94	34.1%	125	51.3%	125	51.6%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-208	-23.1%	-358	-34.2%	-251	-26.6%	-163	-19.1%
Anesthesiology	-46	-9.2%	-130	-22.3%	-73	-13.9%	-21	-4.5%
Radiology	-10	-2.3%	-82	-16.3%	-36	-7.8%	12	2.9%
Emergency Medicine	112	43.7%	93	33.9%	124	51.0%	125	51.3%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-219	-24.3%	-369	-35.2%	-262	-27.8%	-174	-20.4%
Anesthesiology	-45	-9.0%	-129	-22.1%	-72	-13.8%	-20	-4.3%
Radiology	-8	-2.0%	-80	-16.1%	-34	-7.6%	13	3.2%
Emergency Medicine	114	44.5%	95	34.6%	126	51.8%	127	52.1%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-221	-24.6%	-371	-35.4%	-264	-28.0%	-176	-20.6%
Anesthesiology	-46	-9.3%	-130	-22.3%	-74	-14.0%	-22	-4.5%
Radiology	-10	-2.3%	-82	-16.3%	-36	-7.8%	12	2.9%
Emergency Medicine	113	44.1%	94	34.2%	125	51.4%	126	51.7%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-222	-24.7%	-372	-35.5%	-265	-28.2%	-177	-20.7%
Anesthesiology	-47	-9.5%	-131	-22.5%	-74	-14.2%	-22	-4.7%
Radiology	-11	-2.5%	-82	-16.5%	-36	-8.0%	11	2.7%
Emergency Medicine	112	43.8%	93	34.0%	124	51.1%	125	51.4%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-5	-1.7%	-58	-15.8%	-22	-6.7%	10	3.5%
Ophthalmology	-106	-35.1%	-156	-44.4%	-112	-36.4%	-91	-31.7%
Otolaryngology	-19	-16.4%	-37	-28.4%	-23	-19.7%	-13	-12.0%
Orthopedic Surgery	-19	-8.1%	-58	-21.3%	-33	-13.6%	-7	-3.2%
25% Primary Care/75% Non-Primary Care								
General Surgery	-6	-2.0%	-59	-16.1%	-23	-7.0%	9	3.1%
Ophthalmology	-106	-35.3%	-157	-44.6%	-112	-36.6%	-91	-31.9%
Otolaryngology	-19	-16.7%	-38	-28.6%	-23	-20.0%	-13	-12.3%
Orthopedic Surgery	-19	-8.3%	-58	-21.5%	-34	-13.8%	-8	-3.5%
20% Primary Care/80% Non-Primary Care								
General Surgery	-7	-2.2%	-59	-16.2%	-24	-7.2%	9	3.0%
Ophthalmology	-107	-35.4%	-157	-44.7%	-113	-36.7%	-91	-32.0%
Otolaryngology	-19	-16.8%	-38	-28.8%	-24	-20.1%	-13	-12.4%
Orthopedic Surgery	-20	-8.5%	-59	-21.7%	-35	-14.0%	-8	-3.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-8	-2.4%	-60	-16.5%	-24	-7.4%	8	2.7%
Ophthalmology	-107	-35.6%	-158	-44.9%	-113	-36.9%	-92	-32.2%
Otolaryngology	-20	-17.4%	-39	-29.3%	-24	-20.7%	-14	-13.1%
Orthopedic Surgery	-17	-7.4%	-56	-20.7%	-32	-12.9%	-6	-2.5%
25% Primary Care/75% Non-Primary Care								
General Surgery	-9	-2.7%	-61	-16.7%	-25	-7.7%	7	2.4%
Ophthalmology	-108	-35.8%	-158	-45.0%	-114	-37.1%	-93	-32.4%
Otolaryngology	-20	-17.7%	-39	-29.5%	-25	-20.9%	-14	-13.4%
Orthopedic Surgery	-18	-7.7%	-57	-20.9%	-33	-13.2%	-6	-2.8%
20% Primary Care/80% Non-Primary Care								
General Surgery	-9	-2.9%	-61	-16.9%	-26	-7.9%	6	2.2%
Ophthalmology	-108	-35.9%	-159	-45.1%	-114	-37.2%	-93	-32.6%
Otolaryngology	-20	-17.8%	-39	-29.6%	-25	-21.1%	-15	-13.5%
Orthopedic Surgery	-18	-7.9%	-57	-21.1%	-33	-13.4%	-7	-3.0%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-43	-34.7%	-64	-44.1%	-50	-38.1%	-37	-31.2%
Other Surgical Subspecialties	-47	-27.9%	-75	-38.3%	-55	-31.4%	-38	-24.1%
Other Specialties	-115	-11.4%	-284	-24.2%	-164	-15.5%	-65	-6.8%
25% Primary Care/75% Non-Primary Care								
Urology	-44	-34.9%	-65	-44.2%	-51	-38.3%	-37	-31.4%
Other Surgical Subspecialties	-47	-28.1%	-75	-38.5%	-55	-31.6%	-39	-24.4%
Other Specialties	-118	-11.7%	-286	-24.4%	-166	-15.8%	-67	-7.1%
20% Primary Care/80% Non-Primary Care								
Urology	-44	-35.0%	-65	-44.3%	-51	-38.4%	-37	-31.6%
Other Surgical Subspecialties	-47	-28.3%	-75	-38.6%	-56	-31.7%	-39	-24.5%
Other Specialties	-119	-11.9%	-288	-24.5%	-168	-15.9%	-69	-7.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-44	-35.2%	-65	-44.5%	-51	-38.6%	-38	-31.8%
Other Surgical Subspecialties	-47	-28.3%	-75	-38.6%	-56	-31.7%	-39	-24.6%
Other Specialties	-122	-12.1%	-291	-24.8%	-171	-16.2%	-72	-7.5%
25% Primary Care/75% Non-Primary Care								
Urology	-44	-35.4%	-65	-44.7%	-51	-38.8%	-38	-32.0%
Other Surgical Subspecialties	-48	-28.5%	-76	-38.8%	-56	-32.0%	-39	-24.8%
Other Specialties	-125	-12.4%	-294	-25.0%	-173	-16.4%	-75	-7.8%
20% Primary Care/80% Non-Primary Care								
Urology	-44	-35.5%	-65	-44.8%	-51	-38.9%	-38	-32.1%
Other Surgical Subspecialties	-48	-28.7%	-76	-38.9%	-56	-32.1%	-40	-24.9%
Other Specialties	-127	-12.6%	-295	-25.1%	-175	-16.6%	-76	-8.0%

Relationship between Physician Supply and Demand in Long Island 2030

Long Island Supply Scenario 1: Baseline

Figure 1 – Projected Difference Between Physician Supply and Demand in Long Island in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>All Physicians</i>	352	2.9%	-1,235	-9.1%	-230	-1.8%	771	6.6%
Supply responsive to demand								
<i>All Physicians</i>	-384	-3.2%	-1,970	-14.5%	-965	-7.7%	36	0.3%

Figure 2 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care</i>	-18	-0.5%	-285	-7.3%	-205	-5.4%	-18	-0.5%
<i>Non-Primary Care</i>	369	4.4%	-950	-9.8%	-25	-0.3%	789	9.9%
Supply responsive to demand								
<i>Primary Care</i>	-242	-6.7%	-510	-13.1%	-430	-11.3%	-242	-6.7%
<i>Non-Primary Care</i>	-141	-1.7%	-1,460	-15.0%	-535	-6.1%	278	3.5%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 3 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care (Overall)</i>	-18	-0.5%	-285	-7.3%	-205	-5.4%	-18	-0.5%
<i>General/Family Medicine</i>	-65	-7.5%	-128	-13.8%	-94	-10.5%	-65	-7.5%
<i>General Internal Medicine</i>	-137	-7.1%	-278	-13.5%	-254	-12.5%	-137	-7.1%
<i>General Pediatrics</i>	183	21.7%	121	13.3%	143	16.1%	183	21.7%
Supply responsive to demand								
<i>Primary Care (Overall)</i>	-242	-6.7%	-510	-13.1%	-430	-11.3%	-242	-6.7%
<i>General/Family Medicine</i>	-91	-10.5%	-155	-16.7%	-121	-13.5%	-91	-10.5%
<i>General Internal Medicine</i>	-256	-13.4%	-397	-19.3%	-373	-18.4%	-256	-13.4%
<i>General Pediatrics</i>	105	12.4%	42	4.6%	64	7.2%	105	12.4%

Non-Primary Care Specialties

Figure 4 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Cardiology	55	9.9%	-39	-5.9%	31	5.3%	83	15.6%
Other Internal Medicine Subspecialties	460	27.7%	182	9.4%	365	20.8%	543	34.4%
Obstetrics and Gynecology	50	9.2%	10	1.7%	24	4.1%	77	14.9%
Pathology	-86	-30.7%	-132	-40.6%	-103	-34.6%	-72	-27.0%
Supply responsive to demand								
Cardiology	17	3.1%	-77	-11.7%	-7	-1.2%	45	8.5%
Other Internal Medicine Subspecialties	324	19.5%	46	2.4%	229	13.0%	407	25.8%
Obstetrics and Gynecology	23	4.2%	-17	-3.0%	-3	-0.6%	50	9.7%
Pathology	-95	-34.1%	-142	-43.6%	-112	-37.9%	-81	-30.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Psychiatry	-107	-16.1%	-218	-28.1%	-139	-19.9%	-73	-11.7%
Anesthesiology	-14	-1.8%	-143	-15.9%	-56	-6.9%	24	3.3%
Radiology	38	5.8%	-72	-9.4%	-2	-0.2%	71	11.4%
Emergency Medicine	227	57.2%	198	46.4%	246	65.2%	247	65.5%
Supply responsive to demand								
Psychiatry	-149	-22.5%	-260	-33.6%	-181	-26.1%	-116	-18.4%
Anesthesiology	-52	-6.8%	-181	-20.2%	-94	-11.6%	-14	-1.9%
Radiology	3	0.4%	-108	-14.0%	-37	-5.3%	36	5.7%
Emergency Medicine	190	48.1%	161	37.9%	209	55.5%	210	55.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
General Surgery	25	6.1%	-44	-9.1%	3	0.7%	46	11.7%
Ophthalmology	-103	-30.1%	-160	-40.1%	-110	-31.5%	-86	-26.4%
Otolaryngology	-12	-10.0%	-32	-22.9%	-17	-13.6%	-6	-5.3%
Orthopedic Surgery	-2	-0.7%	-59	-14.9%	-24	-6.6%	15	4.5%
Supply responsive to demand								
General Surgery	0	-0.1%	-69	-14.4%	-22	-5.2%	20	5.2%
Ophthalmology	-116	-34.1%	-174	-43.5%	-124	-35.4%	-99	-30.6%
Otolaryngology	-18	-15.4%	-38	-27.6%	-23	-18.8%	-12	-11.0%
Orthopedic Surgery	-17	-5.1%	-74	-18.8%	-39	-10.8%	0	-0.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Urology	-56	-29.5%	-88	-39.6%	-66	-33.2%	-46	-25.7%
Other Surgical Subspecialties	-52	-22.0%	-91	-33.2%	-63	-25.7%	-40	-17.9%
Other Supecialties	-54	-4.4%	-261	-18.2%	-114	-8.8%	7	0.6%
Supply responsive to demand								
Urology	-64	-33.6%	-96	-43.2%	-74	-37.1%	-54	-30.1%
Other Surgical Subspecialties	-62	-26.6%	-102	-37.1%	-74	-30.1%	-51	-22.7%
Other Specialties	-123	-10.0%	-329	-22.9%	-182	-14.1%	-61	-5.3%

Long Island Supply Scenario 2: NP/PA High and Lower Growth

Figure 5 – Projected Difference Between Physician Supply and Demand in Long Island in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	1,568	13.0%	-18	-0.1%	987	7.8%	1,988	17.1%
NP/PA Lower Growth								
<i>All Physicians</i>	868	7.2%	-719	-5.3%	286	2.3%	1,287	11.1%
Supply responsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	891	7.4%	-696	-5.1%	309	2.5%	1,310	11.3%
NP/PA Lower Growth								
<i>All Physicians</i>	226	1.9%	-1,360	-10.0%	-355	-2.8%	646	5.6%

Figure 6 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care	583	16.1%	315	8.1%	396	10.4%	583	16.1%
Non-Primary Care	986	11.7%	-333	-3.4%	591	6.7%	1,405	17.6%
NP/PA Lower Growth								
Primary Care	271	7.5%	4	0.1%	84	2.2%	271	7.5%
Non-Primary Care	596	7.1%	-723	-7.4%	202	2.3%	1,016	12.7%
Supply responsive to demand								
NP/PA High Growth								
Primary Care	324	8.9%	56	1.4%	137	3.6%	324	8.9%
Non-Primary Care	567	6.8%	-752	-7.7%	172	2.0%	986	12.4%
NP/PA Lower Growth								
Primary Care	31	0.9%	-236	-6.1%	-156	-4.1%	31	0.9%
Non-Primary Care	195	2.3%	-1,124	-11.6%	-199	-2.3%	615	7.7%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 7 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care (Overall)	583	16.1%	315	8.1%	396	10.4%	583	16.1%
General/Family Medicine	69	7.9%	5	0.5%	39	4.4%	69	7.9%
General Internal Medicine	159	8.3%	18	0.9%	42	2.1%	159	8.3%
General Pediatrics	355	41.9%	292	32.2%	314	35.4%	355	41.9%
NP/PA Lower Growth								
Primary Care (Overall)	271	7.5%	4	0.1%	84	2.2%	271	7.5%
General/Family Medicine	0	-0.1%	-64	-6.9%	-30	-3.3%	0	-0.1%
General Internal Medicine	6	0.3%	-136	-6.6%	-112	-5.5%	6	0.3%
General Pediatrics	266	31.4%	204	22.4%	225	25.4%	266	31.4%
Supply responsive to demand								
NP/PA High Growth								
Primary Care (Overall)	324	8.9%	56	1.4%	137	3.6%	324	8.9%
General/Family Medicine	38	4.4%	-26	-2.8%	9	1.0%	38	4.4%
General Internal Medicine	22	1.1%	-120	-5.8%	-96	-4.7%	22	1.1%
General Pediatrics	264	31.2%	202	22.2%	223	25.2%	264	31.2%
NP/PA Lower Growth								
Primary Care (Overall)	31	0.9%	-236	-6.1%	-156	-4.1%	31	0.9%
General/Family Medicine	-29	-3.3%	-92	-9.9%	-58	-6.5%	-29	-3.3%
General Internal Medicine	-122	-6.4%	-263	-12.8%	-239	-11.8%	-122	-6.4%
General Pediatrics	182	21.5%	119	13.1%	141	15.9%	182	21.5%

Non-Primary Care Specialties

Figure 8 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Cardiology	98	17.6%	5	0.7%	74	12.8%	126	23.8%
Other Internal Medicine Subspecialties	609	36.7%	331	17.1%	514	29.3%	692	43.9%
Obstetrics and Gynecology	91	16.8%	51	8.8%	65	11.5%	119	23.0%
Pathology	-72	-25.8%	-119	-36.5%	-89	-30.1%	-58	-21.9%
NP/PA Lower Growth								
Cardiology	71	12.7%	-23	-3.5%	47	8.1%	99	18.6%
Other Internal Medicine Subspecialties	515	31.0%	236	12.2%	420	23.9%	598	37.9%
Obstetrics and Gynecology	65	12.0%	25	4.3%	39	6.8%	92	17.9%
Pathology	-81	-28.9%	-127	-39.1%	-98	-33.0%	-67	-25.2%
Supply responsive to demand								
NP/PA High Growth								
Cardiology	66	11.9%	-27	-4.2%	42	7.3%	94	17.8%
Other Internal Medicine Subspecialties	494	29.8%	216	11.1%	399	22.7%	577	36.6%
Obstetrics and Gynecology	71	13.1%	31	5.4%	45	7.9%	98	19.1%
Pathology	-79	-28.5%	-126	-38.8%	-96	-32.6%	-66	-24.7%
NP/PA Lower Growth								
Cardiology	40	7.3%	-53	-8.2%	17	2.8%	68	12.9%
Other Internal Medicine Subspecialties	405	24.4%	127	6.5%	310	17.7%	488	31.0%
Obstetrics and Gynecology	46	8.4%	6	1.0%	20	3.5%	73	14.1%
Pathology	-88	-31.5%	-135	-41.3%	-105	-35.4%	-74	-27.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Psychiatry	-67	-10.2%	-179	-23.1%	-99	-14.3%	-34	-5.4%
Anesthesiology	39	5.1%	-90	-10.0%	-3	-0.4%	77	10.6%
Radiology	87	13.2%	-23	-3.0%	48	6.8%	120	19.2%
Emergency Medicine	270	68.3%	241	56.7%	289	76.8%	290	77.2%
NP/PA Lower Growth								
Psychiatry	-92	-13.9%	-203	-26.3%	-124	-17.9%	-59	-9.4%
Anesthesiology	6	0.7%	-123	-13.7%	-36	-4.5%	44	6.0%
Radiology	56	8.5%	-54	-7.0%	17	2.4%	89	14.3%
Emergency Medicine	243	61.3%	214	50.2%	262	69.4%	263	69.8%
Supply responsive to demand								
NP/PA High Growth								
Psychiatry	-105	-15.8%	-216	-27.9%	-137	-19.7%	-72	-11.4%
Anesthesiology	9	1.2%	-120	-13.4%	-33	-4.1%	47	6.5%
Radiology	60	9.0%	-51	-6.6%	20	2.8%	93	14.8%
Emergency Medicine	241	60.8%	211	49.7%	260	68.9%	261	69.2%
NP/PA Lower Growth								
Psychiatry	-128	-19.3%	-239	-30.9%	-160	-23.0%	-95	-15.1%
Anesthesiology	-23	-3.0%	-152	-16.9%	-65	-8.0%	15	2.1%
Radiology	30	4.5%	-81	-10.5%	-10	-1.4%	63	10.0%
Emergency Medicine	214	54.1%	185	43.5%	233	61.9%	234	62.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
General Surgery	56	13.6%	-13	-2.7%	33	7.7%	76	19.5%
Ophthalmology	-86	-25.1%	-143	-35.9%	-93	-26.7%	-69	-21.2%
Otolaryngology	-4	-3.7%	-24	-17.5%	-9	-7.5%	2	1.4%
Orthopedic Surgery	21	6.3%	-35	-9.0%	0	-0.1%	38	11.9%
NP/PA Lower Growth								
General Surgery	36	8.9%	-32	-6.8%	14	3.3%	57	14.6%
Ophthalmology	-97	-28.2%	-154	-38.6%	-104	-29.7%	-80	-24.5%
Otolaryngology	-9	-7.7%	-29	-20.9%	-14	-11.3%	-3	-2.8%
Orthopedic Surgery	6	1.9%	-50	-12.7%	-15	-4.2%	23	7.3%
Supply responsive to demand								
NP/PA High Growth								
General Surgery	35	8.5%	-34	-7.1%	13	3.0%	55	14.2%
Ophthalmology	-97	-28.4%	-154	-38.7%	-104	-29.8%	-80	-24.6%
Otolaryngology	-10	-8.2%	-29	-21.4%	-14	-11.8%	-4	-3.3%
Orthopedic Surgery	10	3.0%	-47	-11.8%	-11	-3.2%	27	8.4%
NP/PA Lower Growth								
General Surgery	16	4.0%	-52	-10.9%	-6	-1.3%	37	9.5%
Ophthalmology	-107	-31.4%	-165	-41.2%	-114	-32.8%	-90	-27.8%
Otolaryngology	-14	-12.0%	-34	-24.6%	-19	-15.4%	-8	-7.3%
Orthopedic Surgery	-4	-1.3%	-61	-15.4%	-26	-7.2%	13	3.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Urology	-47	-24.5%	-78	-35.3%	-57	-28.5%	-37	-20.5%
Other Surgical Subspecialties	-39	-16.5%	-78	-28.5%	-51	-20.5%	-27	-12.1%
Other Specialties	28	2.3%	-178	-12.4%	-31	-2.4%	90	7.7%
NP/PA Lower Growth								
Urology	-52	-27.6%	-84	-38.0%	-63	-31.4%	-43	-23.8%
Other Surgical Subspecialties	-47	-20.0%	-86	-31.5%	-59	-23.8%	-35	-15.8%
Other Specialties	-24	-2.0%	-230	-16.0%	-83	-6.5%	37	3.2%
Supply responsive to demand								
NP/PA High Growth								
Urology	-53	-27.9%	-85	-38.3%	-64	-31.7%	-44	-24.1%
Other Surgical Subspecialties	-48	-20.3%	-87	-31.7%	-59	-24.1%	-36	-16.1%
Other Specialties	-28	-2.3%	-234	-16.3%	-87	-6.8%	34	2.9%
NP/PA Lower Growth								
Urology	-59	-30.9%	-91	-40.8%	-69	-34.6%	-49	-27.3%
Other Surgical Subspecialties	-55	-23.6%	-95	-34.6%	-67	-27.2%	-44	-19.6%
Other Specialties	-78	-6.3%	-284	-19.8%	-137	-10.6%	-16	-1.4%

Long Island Supply Scenario 3a: Increased Retention of Physicians

Figure 9 – Projected Difference Between Physician Supply and Demand in Long Island in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	646	5.4%	-940	-6.9%	65	0.5%	1,066	9.2%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	646	5.4%	-940	-6.9%	65	0.5%	1,066	9.2%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	646	5.4%	-940	-6.9%	65	0.5%	1,066	9.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-103	-0.9%	-1,690	-12.4%	-685	-5.4%	316	2.7%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-103	-0.9%	-1,690	-12.4%	-685	-5.4%	316	2.7%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-103	-0.9%	-1,690	-12.4%	-685	-5.4%	316	2.7%

Figure 10 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	80	2.2%	-187	-4.8%	-107	-2.8%	80	2.2%
Non-Primary Care	566	6.7%	-753	-7.8%	172	2.0%	986	12.4%
25% Primary Care/75% Non-Primary Care								
Primary Care	56	1.5%	-212	-5.4%	-131	-3.4%	56	1.5%
Non-Primary Care	590	7.0%	-729	-7.5%	196	2.2%	1,010	12.7%
20% Primary Care/80% Non-Primary Care								
Primary Care	41	1.1%	-226	-5.8%	-146	-3.8%	41	1.1%
Non-Primary Care	605	7.2%	-714	-7.4%	211	2.4%	1,025	12.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-149	-4.1%	-417	-10.7%	-336	-8.8%	-149	-4.1%
Non-Primary Care	46	0.5%	-1,273	-13.1%	-348	-4.0%	466	5.8%
25% Primary Care/75% Non-Primary Care								
Primary Care	-172	-4.8%	-440	-11.3%	-360	-9.4%	-172	-4.8%
Non-Primary Care	69	0.8%	-1,250	-12.9%	-325	-3.7%	489	6.1%
20% Primary Care/80% Non-Primary Care								
Primary Care	-186	-5.1%	-454	-11.7%	-374	-9.8%	-186	-5.1%
Non-Primary Care	83	1.0%	-1,236	-12.7%	-311	-3.5%	503	6.3%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 11 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	80	2.2%	-187	-4.8%	-107	-2.8%	80	2.2%
General/Family Medicine	-43	-4.9%	-107	-11.5%	-72	-8.1%	-43	-4.9%
General Internal Medicine	-88	-4.6%	-230	-11.2%	-206	-10.1%	-88	-4.6%
General Pediatrics	212	25.0%	149	16.4%	171	19.3%	212	25.0%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	56	1.5%	-212	-5.4%	-131	-3.4%	56	1.5%
General/Family Medicine	-48	-5.6%	-112	-12.1%	-77	-8.7%	-48	-5.6%
General Internal Medicine	-100	-5.2%	-242	-11.8%	-218	-10.7%	-100	-5.2%
General Pediatrics	205	24.1%	142	15.6%	164	18.5%	205	24.1%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	41	1.1%	-226	-5.8%	-146	-3.8%	41	1.1%
General/Family Medicine	-51	-5.9%	-115	-12.4%	-81	-9.0%	-51	-5.9%
General Internal Medicine	-108	-5.6%	-249	-12.1%	-225	-11.1%	-108	-5.6%
General Pediatrics	200	23.7%	138	15.2%	160	18.0%	200	23.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-149	-4.1%	-417	-10.7%	-336	-8.8%	-149	-4.1%
General/Family Medicine	-70	-8.1%	-134	-14.4%	-99	-11.1%	-70	-8.1%
General Internal Medicine	-210	-11.0%	-351	-17.1%	-328	-16.1%	-210	-11.0%
General Pediatrics	131	15.5%	69	7.5%	91	10.2%	131	15.5%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-172	-4.8%	-440	-11.3%	-360	-9.4%	-172	-4.8%
General/Family Medicine	-75	-8.7%	-139	-15.0%	-104	-11.7%	-75	-8.7%
General Internal Medicine	-222	-11.6%	-363	-17.6%	-339	-16.7%	-222	-11.6%
General Pediatrics	124	14.7%	62	6.8%	84	9.5%	124	14.7%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-186	-5.1%	-454	-11.7%	-374	-9.8%	-186	-5.1%
General/Family Medicine	-78	-9.1%	-142	-15.3%	-108	-12.0%	-78	-9.1%
General Internal Medicine	-229	-11.9%	-370	-18.0%	-346	-17.0%	-229	-11.9%
General Pediatrics	121	14.2%	58	6.4%	80	9.0%	121	14.2%

Non-Primary Care Specialties

Figure 12 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	69	12.3%	-25	-3.8%	45	7.7%	97	18.2%
Other Internal Medicine Subspecialties	507	30.6%	229	11.8%	412	23.5%	590	37.4%
Obstetrics and Gynecology	63	11.6%	23	3.9%	37	6.5%	90	17.5%
Pathology	-81	-29.1%	-128	-39.3%	-98	-33.2%	-67	-25.4%
25% Primary Care/75% Non-Primary Care								
Cardiology	70	12.6%	-23	-3.5%	47	8.0%	98	18.6%
Other Internal Medicine Subspecialties	513	30.9%	235	12.1%	418	23.8%	596	37.8%
Obstetrics and Gynecology	65	11.9%	25	4.2%	38	6.8%	92	17.8%
Pathology	-81	-28.9%	-128	-39.1%	-98	-33.0%	-67	-25.2%
20% Primary Care/80% Non-Primary Care								
Cardiology	72	12.8%	-22	-3.4%	48	8.2%	99	18.8%
Other Internal Medicine Subspecialties	517	31.1%	239	12.3%	422	24.0%	600	38.0%
Obstetrics and Gynecology	66	12.1%	26	4.4%	39	6.9%	93	18.0%
Pathology	-80	-28.8%	-127	-39.0%	-97	-32.9%	-66	-25.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	30	5.4%	-64	-9.7%	6	1.1%	58	10.9%
Other Internal Medicine Subspecialties	369	22.2%	91	4.7%	274	15.6%	452	28.7%
Obstetrics and Gynecology	36	6.6%	-4	-0.8%	9	1.7%	63	12.2%
Pathology	-91	-32.6%	-138	-42.3%	-108	-36.5%	-77	-29.1%
25% Primary Care/75% Non-Primary Care								
Cardiology	32	5.7%	-62	-9.5%	8	1.3%	60	11.2%
Other Internal Medicine Subspecialties	375	22.6%	96	5.0%	280	15.9%	458	29.0%
Obstetrics and Gynecology	37	6.9%	-3	-0.5%	11	1.9%	64	12.5%
Pathology	-91	-32.5%	-137	-42.2%	-107	-36.3%	-77	-28.9%
20% Primary Care/80% Non-Primary Care								
Cardiology	33	5.9%	-61	-9.3%	9	1.5%	61	11.4%
Other Internal Medicine Subspecialties	378	22.8%	100	5.1%	283	16.1%	461	29.2%
Obstetrics and Gynecology	38	7.0%	-2	-0.3%	12	2.1%	65	12.7%
Pathology	-90	-32.4%	-137	-42.1%	-107	-36.2%	-76	-28.8%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-94	-14.2%	-205	-26.5%	-126	-18.1%	-61	-9.7%
Anesthesiology	3	0.4%	-126	-14.0%	-39	-4.8%	41	5.7%
Radiology	54	8.2%	-57	-7.4%	14	2.0%	87	13.9%
Emergency Medicine	241	60.8%	211	49.7%	260	68.9%	260	69.2%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-93	-14.0%	-204	-26.3%	-124	-17.9%	-59	-9.4%
Anesthesiology	5	0.7%	-124	-13.8%	-37	-4.6%	43	6.0%
Radiology	56	8.5%	-55	-7.1%	16	2.3%	89	14.2%
Emergency Medicine	242	61.2%	213	50.1%	261	69.3%	262	69.7%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-92	-13.8%	-203	-26.2%	-124	-17.8%	-58	-9.3%
Anesthesiology	6	0.8%	-122	-13.7%	-36	-4.4%	45	6.1%
Radiology	57	8.7%	-54	-7.0%	17	2.5%	90	14.4%
Emergency Medicine	243	61.5%	214	50.4%	262	69.6%	263	70.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-137	-20.7%	-249	-32.1%	-169	-24.4%	-104	-16.6%
Anesthesiology	-36	-4.7%	-165	-18.4%	-78	-9.6%	2	0.3%
Radiology	18	2.7%	-93	-12.0%	-22	-3.1%	51	8.1%
Emergency Medicine	204	51.4%	174	41.0%	223	59.1%	223	59.4%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-136	-20.5%	-247	-31.9%	-168	-24.2%	-103	-16.3%
Anesthesiology	-34	-4.4%	-163	-18.2%	-76	-9.4%	4	0.6%
Radiology	20	3.0%	-91	-11.8%	-20	-2.9%	53	8.4%
Emergency Medicine	205	51.9%	176	41.4%	224	59.5%	225	59.8%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-135	-20.4%	-246	-31.8%	-167	-24.0%	-102	-16.2%
Anesthesiology	-33	-4.3%	-162	-18.0%	-75	-9.2%	6	0.8%
Radiology	21	3.2%	-90	-11.7%	-19	-2.7%	54	8.6%
Emergency Medicine	206	52.1%	177	41.7%	225	59.8%	226	60.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	35	8.5%	-34	-7.1%	13	2.9%	55	14.2%
Ophthalmology	-97	-28.5%	-155	-38.8%	-105	-29.9%	-80	-24.7%
Otolaryngology	-9	-8.0%	-29	-21.2%	-14	-11.6%	-4	-3.1%
Orthopedic Surgery	5	1.5%	-52	-13.0%	-16	-4.5%	22	6.9%
25% Primary Care/75% Non-Primary Care								
General Surgery	36	8.8%	-33	-6.8%	14	3.2%	57	14.5%
Ophthalmology	-97	-28.3%	-154	-38.6%	-104	-29.8%	-80	-24.5%
Otolaryngology	-9	-7.7%	-29	-21.0%	-14	-11.4%	-3	-2.9%
Orthopedic Surgery	6	1.8%	-51	-12.8%	-15	-4.3%	23	7.2%
20% Primary Care/80% Non-Primary Care								
General Surgery	37	9.0%	-32	-6.7%	15	3.4%	57	14.7%
Ophthalmology	-96	-28.2%	-154	-38.5%	-103	-29.6%	-79	-24.4%
Otolaryngology	-9	-7.6%	-29	-20.9%	-14	-11.2%	-3	-2.7%
Orthopedic Surgery	7	2.0%	-50	-12.7%	-15	-4.1%	24	7.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	9	2.2%	-60	-12.5%	-13	-3.0%	30	7.6%
Ophthalmology	-111	-32.6%	-169	-42.2%	-118	-33.9%	-94	-29.0%
Otolaryngology	-16	-13.5%	-36	-25.9%	-21	-16.9%	-10	-9.0%
Orthopedic Surgery	-10	-3.0%	-67	-16.9%	-32	-8.8%	7	2.1%
25% Primary Care/75% Non-Primary Care								
General Surgery	10	2.5%	-59	-12.2%	-12	-2.8%	31	7.9%
Ophthalmology	-111	-32.4%	-168	-42.1%	-118	-33.7%	-94	-28.8%
Otolaryngology	-16	-13.3%	-35	-25.7%	-21	-16.7%	-10	-8.7%
Orthopedic Surgery	-9	-2.7%	-66	-16.7%	-31	-8.5%	8	2.4%
20% Primary Care/80% Non-Primary Care								
General Surgery	11	2.7%	-58	-12.1%	-11	-2.6%	31	8.1%
Ophthalmology	-110	-32.3%	-168	-42.0%	-117	-33.6%	-93	-28.7%
Otolaryngology	-15	-13.1%	-35	-25.6%	-20	-16.5%	-10	-8.6%
Orthopedic Surgery	-9	-2.6%	-66	-16.5%	-30	-8.4%	8	2.6%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-53	-27.9%	-85	-38.2%	-63	-31.7%	-43	-24.1%
Other Surgical Subspecialties	-48	-20.3%	-87	-31.7%	-59	-24.1%	-36	-16.1%
Other Specialties	-28	-2.3%	-234	-16.3%	-87	-6.8%	33	2.9%
25% Primary Care/75% Non-Primary Care								
Urology	-53	-27.7%	-84	-38.1%	-63	-31.5%	-43	-23.9%
Other Surgical Subspecialties	-47	-20.0%	-87	-31.5%	-59	-23.9%	-35	-15.8%
Other Specialties	-25	-2.0%	-231	-16.1%	-84	-6.5%	37	3.1%
20% Primary Care/80% Non-Primary Care								
Urology	-52	-27.6%	-84	-38.0%	-63	-31.4%	-43	-23.7%
Other Surgical Subspecialties	-47	-19.9%	-86	-31.4%	-59	-23.7%	-35	-15.7%
Other Specialties	-23	-1.9%	-229	-16.0%	-82	-6.4%	39	3.3%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-61	-32.1%	-93	-41.9%	-72	-35.7%	-52	-28.6%
Other Surgical Subspecialties	-59	-24.9%	-98	-35.7%	-70	-28.5%	-47	-21.0%
Other Specialties	-98	-8.0%	-304	-21.2%	-157	-12.2%	-36	-3.1%
25% Primary Care/75% Non-Primary Care								
Urology	-61	-31.9%	-93	-41.7%	-71	-35.5%	-51	-28.4%
Other Surgical Subspecialties	-58	-24.7%	-97	-35.5%	-70	-28.3%	-46	-20.7%
Other Specialties	-95	-7.7%	-301	-21.0%	-154	-11.9%	-33	-2.8%
20% Primary Care/80% Non-Primary Care								
Urology	-60	-31.8%	-92	-41.6%	-71	-35.4%	-51	-28.2%
Other Surgical Subspecialties	-58	-24.6%	-97	-35.4%	-70	-28.2%	-46	-20.6%
Other Specialties	-93	-7.5%	-299	-20.8%	-152	-11.8%	-31	-2.7%

Long Island Supply Scenario 3b: Decreased Retention of Physicians

Figure 13 – Projected Difference Between Physician Supply and Demand in Long Island in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	57	0.5%	-1,529	-11.2%	-524	-4.2%	477	4.1%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	57	0.5%	-1,529	-11.2%	-524	-4.2%	477	4.1%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	57	0.5%	-1,529	-11.2%	-524	-4.2%	477	4.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-664	-5.5%	-2,251	-16.5%	-1,246	-9.9%	-245	-2.1%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-664	-5.5%	-2,251	-16.5%	-1,246	-9.9%	-245	-2.1%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-664	-5.5%	-2,251	-16.5%	-1,246	-9.9%	-245	-2.1%

Figure 14 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-116	-3.2%	-383	-9.8%	-303	-7.9%	-116	-3.2%
Non-Primary Care	173	2.1%	-1,146	-11.8%	-221	-2.5%	592	7.4%
25% Primary Care/75% Non-Primary Care								
Primary Care	-91	-2.5%	-359	-9.2%	-279	-7.3%	-91	-2.5%
Non-Primary Care	148	1.8%	-1,171	-12.1%	-246	-2.8%	568	7.1%
20% Primary Care/80% Non-Primary Care								
Primary Care	-77	-2.1%	-344	-8.8%	-264	-6.9%	-77	-2.1%
Non-Primary Care	134	1.6%	-1,185	-12.2%	-261	-3.0%	553	6.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-336	-9.3%	-603	-15.5%	-523	-13.7%	-336	-9.3%
Non-Primary Care	-328	-3.9%	-1,647	-17.0%	-723	-8.2%	91	1.1%
25% Primary Care/75% Non-Primary Care								
Primary Care	-313	-8.6%	-580	-14.9%	-500	-13.1%	-313	-8.6%
Non-Primary Care	-352	-4.2%	-1,671	-17.2%	-746	-8.5%	68	0.9%
20% Primary Care/80% Non-Primary Care								
Primary Care	-299	-8.2%	-566	-14.5%	-486	-12.7%	-299	-8.2%
Non-Primary Care	-366	-4.4%	-1,685	-17.3%	-760	-8.6%	54	0.7%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 15 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-116	-3.2%	-383	-9.8%	-303	-7.9%	-116	-3.2%
General/Family Medicine	-86	-10.0%	-150	-16.2%	-116	-12.9%	-86	-10.0%
General Internal Medicine	-185	-9.7%	-326	-15.9%	-302	-14.9%	-185	-9.7%
General Pediatrics	155	18.4%	93	10.2%	115	13.0%	155	18.4%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-91	-2.5%	-359	-9.2%	-279	-7.3%	-91	-2.5%
General/Family Medicine	-81	-9.3%	-145	-15.6%	-110	-12.3%	-81	-9.3%
General Internal Medicine	-173	-9.0%	-314	-15.3%	-290	-14.3%	-173	-9.0%
General Pediatrics	162	19.2%	100	11.0%	122	13.7%	162	19.2%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-77	-2.1%	-344	-8.8%	-264	-6.9%	-77	-2.1%
General/Family Medicine	-78	-9.0%	-141	-15.2%	-107	-12.0%	-78	-9.0%
General Internal Medicine	-166	-8.7%	-307	-14.9%	-283	-13.9%	-166	-8.7%
General Pediatrics	167	19.7%	104	11.5%	126	14.2%	167	19.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-336	-9.3%	-603	-15.5%	-523	-13.7%	-336	-9.3%
General/Family Medicine	-113	-13.0%	-176	-19.0%	-142	-15.9%	-113	-13.0%
General Internal Medicine	-302	-15.8%	-443	-21.5%	-419	-20.6%	-302	-15.8%
General Pediatrics	78	9.3%	16	1.8%	38	4.3%	78	9.3%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-313	-8.6%	-580	-14.9%	-500	-13.1%	-313	-8.6%
General/Family Medicine	-107	-12.4%	-171	-18.4%	-137	-15.3%	-107	-12.4%
General Internal Medicine	-290	-15.2%	-432	-21.0%	-408	-20.1%	-290	-15.2%
General Pediatrics	85	10.0%	23	2.5%	45	5.0%	85	10.0%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-299	-8.2%	-566	-14.5%	-486	-12.7%	-299	-8.2%
General/Family Medicine	-104	-12.0%	-168	-18.1%	-133	-14.9%	-104	-12.0%
General Internal Medicine	-284	-14.8%	-425	-20.7%	-401	-19.7%	-284	-14.8%
General Pediatrics	89	10.5%	26	2.9%	48	5.5%	89	10.5%

Non-Primary Care Specialties

Figure 16 – Projected Difference Between Physician Supply and Demand in Long Island in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	41	7.4%	-52	-8.0%	17	3.0%	69	13.0%
Other Internal Medicine Subspecialties	412	24.8%	134	6.9%	317	18.1%	495	31.4%
Obstetrics and Gynecology	36	6.7%	-4	-0.6%	10	1.8%	64	12.3%
Pathology	-90	-32.2%	-137	-42.0%	-107	-36.1%	-76	-28.7%
25% Primary Care/75% Non-Primary Care								
Cardiology	40	7.1%	-54	-8.3%	16	2.7%	67	12.7%
Other Internal Medicine Subspecialties	406	24.5%	128	6.6%	311	17.7%	489	31.0%
Obstetrics and Gynecology	35	6.4%	-5	-0.9%	9	1.5%	62	12.0%
Pathology	-91	-32.4%	-137	-42.1%	-107	-36.3%	-77	-28.9%
20% Primary Care/80% Non-Primary Care								
Cardiology	39	6.9%	-55	-8.4%	15	2.5%	66	12.5%
Other Internal Medicine Subspecialties	403	24.3%	124	6.4%	308	17.5%	486	30.8%
Obstetrics and Gynecology	34	6.2%	-6	-1.1%	8	1.3%	61	11.8%
Pathology	-91	-32.6%	-138	-42.2%	-108	-36.4%	-77	-29.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	4	0.7%	-90	-13.8%	-20	-3.4%	32	6.0%
Other Internal Medicine Subspecialties	279	16.8%	1	0.0%	184	10.5%	362	23.0%
Obstetrics and Gynecology	10	1.8%	-30	-5.2%	-16	-2.9%	37	7.2%
Pathology	-99	-35.6%	-146	-44.9%	-116	-39.3%	-85	-32.2%
25% Primary Care/75% Non-Primary Care								
Cardiology	2	0.4%	-91	-14.0%	-22	-3.7%	30	5.7%
Other Internal Medicine Subspecialties	274	16.5%	-5	-0.2%	178	10.2%	357	22.6%
Obstetrics and Gynecology	8	1.5%	-32	-5.4%	-18	-3.1%	35	6.9%
Pathology	-100	-35.8%	-147	-45.0%	-117	-39.5%	-86	-32.4%
20% Primary Care/80% Non-Primary Care								
Cardiology	1	0.2%	-92	-14.1%	-23	-3.9%	29	5.5%
Other Internal Medicine Subspecialties	270	16.3%	-8	-0.4%	175	10.0%	353	22.4%
Obstetrics and Gynecology	7	1.4%	-33	-5.6%	-19	-3.3%	35	6.7%
Pathology	-100	-35.9%	-147	-45.1%	-117	-39.6%	-86	-32.6%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-119	-18.0%	-230	-29.7%	-151	-21.7%	-86	-13.6%
Anesthesiology	-31	-4.0%	-160	-17.8%	-73	-9.0%	8	1.0%
Radiology	23	3.4%	-88	-11.4%	-17	-2.5%	56	8.9%
Emergency Medicine	213	53.7%	184	43.2%	232	61.5%	233	61.8%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-121	-18.2%	-232	-29.9%	-153	-22.0%	-87	-13.9%
Anesthesiology	-33	-4.3%	-162	-18.0%	-75	-9.3%	5	0.7%
Radiology	21	3.1%	-90	-11.7%	-19	-2.7%	54	8.6%
Emergency Medicine	211	53.3%	182	42.8%	230	61.0%	231	61.3%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-122	-18.3%	-233	-30.1%	-154	-22.1%	-88	-14.0%
Anesthesiology	-34	-4.5%	-163	-18.2%	-76	-9.4%	4	0.6%
Radiology	20	3.0%	-91	-11.8%	-20	-2.9%	53	8.4%
Emergency Medicine	210	53.0%	181	42.5%	229	60.7%	230	61.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-161	-24.2%	-272	-35.1%	-193	-27.7%	-128	-20.3%
Anesthesiology	-69	-8.9%	-197	-22.0%	-111	-13.6%	-30	-4.1%
Radiology	-12	-1.9%	-123	-16.0%	-52	-7.4%	21	3.3%
Emergency Medicine	177	44.7%	148	34.8%	196	52.0%	197	52.3%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-162	-24.5%	-273	-35.3%	-194	-27.9%	-129	-20.5%
Anesthesiology	-71	-9.2%	-199	-22.2%	-113	-13.9%	-32	-4.4%
Radiology	-14	-2.1%	-125	-16.2%	-54	-7.7%	19	3.0%
Emergency Medicine	175	44.3%	146	34.4%	194	51.6%	195	51.9%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-163	-24.6%	-274	-35.4%	-195	-28.1%	-130	-20.6%
Anesthesiology	-72	-9.4%	-201	-22.4%	-114	-14.0%	-33	-4.6%
Radiology	-15	-2.3%	-126	-16.3%	-55	-7.9%	18	2.8%
Emergency Medicine	174	44.0%	145	34.2%	193	51.3%	194	51.6%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	15	3.7%	-53	-11.2%	-7	-1.6%	36	9.2%
Ophthalmology	-108	-31.6%	-166	-41.4%	-115	-33.0%	-91	-28.0%
Otolaryngology	-14	-12.0%	-34	-24.7%	-19	-15.5%	-8	-7.4%
Orthopedic Surgery	-10	-2.9%	-67	-16.9%	-31	-8.7%	7	2.2%
25% Primary Care/75% Non-Primary Care								
General Surgery	14	3.4%	-55	-11.4%	-8	-1.9%	35	8.9%
Ophthalmology	-109	-31.8%	-166	-41.6%	-116	-33.2%	-92	-28.2%
Otolaryngology	-14	-12.3%	-34	-24.9%	-19	-15.7%	-9	-7.7%
Orthopedic Surgery	-11	-3.2%	-68	-17.1%	-32	-9.0%	6	1.9%
20% Primary Care/80% Non-Primary Care								
General Surgery	13	3.3%	-55	-11.6%	-9	-2.0%	34	8.7%
Ophthalmology	-109	-31.9%	-167	-41.7%	-116	-33.3%	-92	-28.4%
Otolaryngology	-15	-12.4%	-34	-25.0%	-20	-15.9%	-9	-7.8%
Orthopedic Surgery	-11	-3.4%	-68	-17.2%	-33	-9.1%	6	1.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-10	-2.3%	-78	-16.4%	-32	-7.3%	11	2.8%
Ophthalmology	-122	-35.5%	-179	-44.8%	-129	-36.9%	-104	-32.2%
Otolaryngology	-20	-17.3%	-40	-29.2%	-25	-20.6%	-15	-13.0%
Orthopedic Surgery	-25	-7.3%	-82	-20.6%	-46	-12.8%	-8	-2.4%
25% Primary Care/75% Non-Primary Care								
General Surgery	-11	-2.6%	-79	-16.6%	-33	-7.6%	10	2.5%
Ophthalmology	-122	-35.7%	-180	-45.0%	-129	-37.0%	-105	-32.4%
Otolaryngology	-21	-17.6%	-41	-29.4%	-26	-20.8%	-15	-13.2%
Orthopedic Surgery	-26	-7.6%	-82	-20.8%	-47	-13.1%	-9	-2.7%
20% Primary Care/80% Non-Primary Care								
General Surgery	-11	-2.8%	-80	-16.7%	-34	-7.8%	9	2.3%
Ophthalmology	-123	-35.8%	-180	-45.1%	-130	-37.2%	-105	-32.5%
Otolaryngology	-21	-17.7%	-41	-29.5%	-26	-21.0%	-15	-13.4%
Orthopedic Surgery	-26	-7.7%	-83	-21.0%	-48	-13.2%	-9	-2.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-59	-31.0%	-91	-40.9%	-70	-34.7%	-49	-27.4%
Other Surgical Subspecialties	-56	-23.8%	-95	-34.7%	-68	-27.4%	-44	-19.7%
Other Specialties	-81	-6.6%	-287	-20.0%	-140	-10.9%	-19	-1.7%
25% Primary Care/75% Non-Primary Care								
Urology	-59	-31.2%	-91	-41.1%	-70	-34.8%	-50	-27.6%
Other Surgical Subspecialties	-56	-24.0%	-96	-34.9%	-68	-27.6%	-45	-20.0%
Other Specialties	-84	-6.8%	-290	-20.2%	-143	-11.1%	-23	-1.9%
20% Primary Care/80% Non-Primary Care								
Urology	-60	-31.3%	-91	-41.2%	-70	-35.0%	-50	-27.7%
Other Surgical Subspecialties	-57	-24.1%	-96	-35.0%	-68	-27.7%	-45	-20.1%
Other Specialties	-86	-7.0%	-292	-20.4%	-145	-11.3%	-25	-2.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-67	-35.1%	-99	-44.5%	-77	-38.6%	-57	-31.7%
Other Surgical Subspecialties	-66	-28.2%	-106	-38.5%	-78	-31.7%	-55	-24.5%
Other Specialties	-148	-12.0%	-354	-24.7%	-207	-16.1%	-87	-7.4%
25% Primary Care/75% Non-Primary Care								
Urology	-67	-35.3%	-99	-44.6%	-78	-38.7%	-58	-31.9%
Other Surgical Subspecialties	-67	-28.4%	-106	-38.7%	-79	-31.9%	-55	-24.7%
Other Specialties	-151	-12.3%	-357	-24.9%	-210	-16.3%	-90	-7.7%
20% Primary Care/80% Non-Primary Care								
Urology	-67	-35.4%	-99	-44.7%	-78	-38.8%	-58	-32.0%
Other Surgical Subspecialties	-67	-28.6%	-107	-38.8%	-79	-32.0%	-55	-24.8%
Other Specialties	-153	-12.4%	-359	-25.0%	-212	-16.5%	-92	-7.8%

Relationship between Physician Supply and Demand in Mohawk Valley 2030

Mohawk Valley Supply Scenario 1: Baseline

Figure 1 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>All Physicians</i>	52	5.9%	-55	-5.6%	12	1.3%	77	9.1%
Supply responsive to demand								
<i>All Physicians</i>	-52	-5.9%	-159	-16.1%	-93	-10.0%	-27	-3.1%

Figure 2 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care</i>	8	2.2%	-19	-4.8%	-9	-2.2%	8	2.2%
<i>Non-Primary Care</i>	44	8.6%	-36	-6.1%	20	3.8%	69	14.3%
Supply responsive to demand								
<i>Primary Care</i>	-33	-9.0%	-61	-15.2%	-50	-12.9%	-33	-9.0%
<i>Non-Primary Care</i>	-19	-3.8%	-99	-16.7%	-43	-8.0%	6	1.3%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 3 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care (Overall)</i>	8	2.2%	-19	-4.8%	-9	-2.2%	8	2.2%
<i>General/Family Medicine</i>	-1	-0.7%	-16	-7.5%	-8	-3.9%	-1	-0.7%
<i>General Internal Medicine</i>	-1	-0.7%	-11	-7.6%	-9	-6.5%	-1	-0.7%
<i>General Pediatrics</i>	10	24.9%	7	16.4%	8	19.2%	10	24.9%
Supply responsive to demand								
<i>Primary Care (Overall)</i>	-33	-9.0%	-61	-15.2%	-50	-12.9%	-33	-9.0%
<i>General/Family Medicine</i>	-21	-10.5%	-35	-16.7%	-27	-13.5%	-21	-10.5%
<i>General Internal Medicine</i>	-18	-13.4%	-27	-19.3%	-26	-18.4%	-18	-13.4%
<i>General Pediatrics</i>	5	12.4%	2	4.6%	3	7.2%	5	12.4%

Non-Primary Care Specialties

Figure 4 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Cardiology	5	17.0%	0	0.2%	4	12.2%	6	23.1%
Other Internal Medicine Subspecialties	20	35.9%	11	16.4%	17	28.6%	23	43.1%
Obstetrics and Gynecology	6	17.8%	3	9.7%	4	12.4%	8	24.0%
Pathology	-5	-25.0%	-9	-35.8%	-7	-29.3%	-4	-21.1%
Supply responsive to demand								
Cardiology	1	3.1%	-4	-11.7%	0	-1.2%	2	8.5%
Other Internal Medicine Subspecialties	11	19.5%	2	2.4%	8	13.0%	14	25.8%
Obstetrics and Gynecology	1	4.2%	-1	-3.0%	0	-0.6%	3	9.7%
Pathology	-7	-34.1%	-11	-43.6%	-8	-37.9%	-6	-30.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Psychiatry	-6	-10.8%	-17	-23.6%	-9	-14.9%	-3	-6.1%
Anesthesiology	2	3.9%	-6	-11.0%	-1	-1.5%	4	9.4%
Radiology	6	11.8%	-2	-4.2%	3	5.5%	8	17.7%
Emergency Medicine	19	62.3%	17	51.2%	21	70.5%	21	70.9%
Supply responsive to demand								
Psychiatry	-13	-22.5%	-24	-33.6%	-16	-26.1%	-10	-18.4%
Anesthesiology	-3	-6.8%	-12	-20.2%	-6	-11.6%	-1	-1.9%
Radiology	0	0.4%	-8	-14.0%	-3	-5.3%	3	5.7%
Emergency Medicine	15	48.1%	13	37.9%	16	55.5%	16	55.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
General Surgery	4	13.6%	-1	-2.7%	3	7.8%	6	19.6%
Ophthalmology	-6	-26.6%	-9	-37.2%	-6	-28.1%	-5	-22.8%
Otolaryngology	0	-6.0%	-2	-19.5%	-1	-9.7%	0	-1.1%
Orthopedic Surgery	2	7.1%	-3	-8.2%	0	0.7%	4	12.8%
Supply responsive to demand								
General Surgery	0	-0.1%	-5	-14.4%	-2	-5.2%	2	5.2%
Ophthalmology	-7	-34.1%	-11	-43.5%	-8	-35.4%	-6	-30.6%
Otolaryngology	-1	-15.4%	-3	-27.6%	-2	-18.8%	-1	-11.0%
Orthopedic Surgery	-2	-5.1%	-7	-18.8%	-4	-10.8%	0	-0.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Urology	-3	-24.6%	-6	-35.4%	-4	-28.5%	-3	-20.6%
Other Surgical Subspecialties	-1	-13.1%	-2	-25.6%	-1	-17.3%	-1	-8.6%
Other Supecialties	1	2.1%	-9	-12.5%	-2	-2.6%	5	7.5%
Supply responsive to demand								
Urology	-5	-33.6%	-7	-43.2%	-5	-37.1%	-4	-30.1%
Other Surgical Subspecialties	-2	-26.6%	-3	-37.1%	-3	-30.1%	-2	-22.7%
Other Specialties	-6	-10.0%	-17	-22.9%	-9	-14.1%	-3	-5.3%

Mohawk Valley Supply Scenario 2: NP/PA High and Lower Growth

Figure 5 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	183	20.8%	76	7.7%	143	15.5%	209	24.4%
NP/PA Lower Growth								
<i>All Physicians</i>	124	14.1%	17	1.8%	84	9.1%	150	17.5%
Supply responsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	46	5.2%	-61	-6.1%	6	0.7%	72	8.4%
NP/PA Lower Growth								
<i>All Physicians</i>	-5	-0.6%	-112	-11.3%	-45	-4.9%	20	2.4%

Figure 6 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care	83	22.3%	55	13.9%	66	17.0%	83	22.3%
Non-Primary Care	101	19.7%	21	3.6%	77	14.5%	126	26.0%
NP/PA Lower Growth								
Primary Care	49	13.2%	22	5.4%	32	8.3%	49	13.2%
Non-Primary Care	75	14.7%	-4	-0.7%	52	9.7%	101	20.8%
Supply responsive to demand								
NP/PA High Growth								
Primary Care	23	6.3%	-4	-1.0%	7	1.7%	23	6.3%
Non-Primary Care	23	4.5%	-57	-9.6%	0	-0.1%	48	10.0%
NP/PA Lower Growth								
Primary Care	-6	-1.6%	-33	-8.3%	-23	-5.8%	-6	-1.6%
Non-Primary Care	1	0.2%	-79	-13.3%	-23	-4.2%	26	5.4%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 7 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>Primary Care (Overall)</i>	83	22.3%	55	13.9%	66	17.0%	83	22.3%
<i>General/Family Medicine</i>	37	18.8%	23	10.7%	30	14.9%	37	18.8%
<i>General Internal Medicine</i>	25	18.8%	15	10.6%	17	11.9%	25	18.8%
<i>General Pediatrics</i>	21	49.5%	18	39.2%	19	42.6%	21	49.5%
NP/PA Lower Growth								
<i>Primary Care (Overall)</i>	49	13.2%	22	5.4%	32	8.3%	49	13.2%
<i>General/Family Medicine</i>	20	10.0%	5	2.5%	13	6.4%	20	10.0%
<i>General Internal Medicine</i>	13	10.0%	3	2.4%	5	3.6%	13	10.0%
<i>General Pediatrics</i>	16	38.4%	13	28.9%	14	32.1%	16	38.4%
Supply responsive to demand								
NP/PA High Growth								
<i>Primary Care (Overall)</i>	23	6.3%	-4	-1.0%	7	1.7%	23	6.3%
<i>General/Family Medicine</i>	9	4.4%	-6	-2.8%	2	1.0%	9	4.4%
<i>General Internal Medicine</i>	1	1.1%	-8	-5.8%	-7	-4.7%	1	1.1%
<i>General Pediatrics</i>	13	31.2%	10	22.2%	11	25.2%	13	31.2%
NP/PA Lower Growth								
<i>Primary Care (Overall)</i>	-6	-1.6%	-33	-8.3%	-23	-5.8%	-6	-1.6%
<i>General/Family Medicine</i>	-7	-3.3%	-21	-9.9%	-13	-6.5%	-7	-3.3%
<i>General Internal Medicine</i>	-8	-6.4%	-18	-12.8%	-16	-11.8%	-8	-6.4%
<i>General Pediatrics</i>	9	21.5%	6	13.1%	7	15.9%	9	21.5%

Non-Primary Care Specialties

Figure 8 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Cardiology	8	28.9%	3	10.4%	7	23.6%	10	35.7%
Other Internal Medicine Subspecialties	28	49.9%	19	28.3%	25	41.7%	31	57.7%
Obstetrics and Gynecology	10	29.9%	7	21.0%	8	23.9%	12	36.7%
Pathology	-4	-17.4%	-7	-29.2%	-5	-22.1%	-3	-13.0%
NP/PA Lower Growth								
Cardiology	7	23.6%	2	5.8%	5	18.5%	8	30.1%
Other Internal Medicine Subspecialties	24	43.6%	15	23.0%	21	35.8%	27	51.2%
Obstetrics and Gynecology	8	24.5%	6	16.0%	6	18.8%	10	31.1%
Pathology	-4	-20.8%	-8	-32.2%	-6	-25.3%	-3	-16.6%
Supply responsive to demand								
NP/PA High Growth								
Cardiology	3	11.9%	-1	-4.2%	2	7.3%	5	17.8%
Other Internal Medicine Subspecialties	17	29.8%	7	11.1%	13	22.7%	19	36.6%
Obstetrics and Gynecology	4	13.1%	2	5.4%	3	7.9%	6	19.1%
Pathology	-6	-28.5%	-10	-38.8%	-7	-32.6%	-5	-24.7%
NP/PA Lower Growth								
Cardiology	2	7.3%	-3	-8.2%	1	2.8%	3	12.9%
Other Internal Medicine Subspecialties	14	24.4%	4	6.5%	10	17.7%	16	31.0%
Obstetrics and Gynecology	3	8.4%	0	1.0%	1	3.5%	4	14.1%
Pathology	-7	-31.5%	-10	-41.3%	-8	-35.4%	-6	-27.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Psychiatry	-1	-1.7%	-11	-15.8%	-4	-6.2%	2	3.5%
Anesthesiology	7	14.6%	-1	-1.9%	5	8.6%	10	20.6%
Radiology	12	23.3%	3	5.6%	9	16.3%	14	29.8%
Emergency Medicine	24	79.0%	22	66.7%	26	88.0%	26	88.4%
NP/PA Lower Growth								
Psychiatry	-3	-5.7%	-14	-19.3%	-6	-10.1%	0	-0.8%
Anesthesiology	5	9.8%	-3	-6.0%	2	4.1%	7	15.6%
Radiology	9	18.2%	1	1.2%	6	11.4%	12	24.4%
Emergency Medicine	22	71.5%	20	59.7%	24	80.2%	24	80.6%
Supply responsive to demand								
NP/PA High Growth								
Psychiatry	-10	-15.8%	-20	-27.9%	-12	-19.7%	-7	-11.4%
Anesthesiology	1	1.2%	-8	-13.4%	-2	-4.1%	3	6.5%
Radiology	5	9.0%	-4	-6.6%	2	2.8%	7	14.8%
Emergency Medicine	19	60.8%	17	49.7%	20	68.9%	20	69.2%
NP/PA Lower Growth								
Psychiatry	-12	-19.3%	-22	-30.9%	-14	-23.0%	-9	-15.1%
Anesthesiology	-2	-3.0%	-10	-16.9%	-4	-8.0%	1	2.1%
Radiology	2	4.5%	-6	-10.5%	-1	-1.4%	5	10.0%
Emergency Medicine	17	54.1%	14	43.5%	18	61.9%	18	62.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
General Surgery	8	25.2%	3	7.3%	6	18.8%	10	31.8%
Ophthalmology	-4	-19.1%	-8	-30.7%	-4	-20.8%	-3	-14.9%
Otolaryngology	0	3.6%	-1	-11.3%	0	-0.5%	1	9.1%
Orthopedic Surgery	6	18.1%	0	1.2%	4	11.0%	8	24.3%
NP/PA Lower Growth								
General Surgery	6	20.0%	1	2.8%	5	13.9%	8	26.4%
Ophthalmology	-5	-22.5%	-8	-33.6%	-5	-24.1%	-4	-18.4%
Otolaryngology	0	-0.7%	-1	-15.0%	0	-4.6%	0	4.5%
Orthopedic Surgery	4	13.2%	-1	-3.0%	2	6.4%	6	19.2%
Supply responsive to demand								
NP/PA High Growth								
General Surgery	3	8.5%	-3	-7.1%	1	3.0%	4	14.2%
Ophthalmology	-6	-28.4%	-9	-38.7%	-6	-29.8%	-5	-24.6%
Otolaryngology	-1	-8.2%	-2	-21.4%	-1	-11.8%	0	-3.3%
Orthopedic Surgery	1	3.0%	-5	-11.8%	-1	-3.2%	3	8.4%
NP/PA Lower Growth								
General Surgery	1	4.0%	-4	-10.9%	0	-1.3%	3	9.5%
Ophthalmology	-7	-31.4%	-10	-41.2%	-7	-32.8%	-6	-27.8%
Otolaryngology	-1	-12.0%	-2	-24.6%	-1	-15.4%	-1	-7.3%
Orthopedic Surgery	0	-1.3%	-6	-15.4%	-3	-7.2%	1	3.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Urology	-2	-16.8%	-5	-28.8%	-3	-21.2%	-2	-12.5%
Other Surgical Subspecialties	0	-4.2%	-2	-18.0%	-1	-8.8%	0	0.8%
Other Specialties	8	12.6%	-3	-3.6%	5	7.4%	11	18.5%
NP/PA Lower Growth								
Urology	-3	-20.3%	-5	-31.7%	-4	-24.5%	-2	-16.1%
Other Surgical Subspecialties	-1	-8.2%	-2	-21.4%	-1	-12.6%	0	-3.4%
Other Specialties	5	7.9%	-6	-7.6%	2	3.0%	8	13.6%
Supply responsive to demand								
NP/PA High Growth								
Urology	-4	-27.9%	-6	-38.3%	-5	-31.7%	-3	-24.1%
Other Surgical Subspecialties	-2	-20.3%	-3	-31.7%	-2	-24.1%	-1	-16.1%
Other Specialties	-1	-2.3%	-12	-16.3%	-5	-6.8%	2	2.9%
NP/PA Lower Growth								
Urology	-4	-30.9%	-7	-40.8%	-5	-34.6%	-4	-27.3%
Other Surgical Subspecialties	-2	-23.6%	-3	-34.6%	-2	-27.2%	-1	-19.6%
Other Specialties	-4	-6.3%	-15	-19.8%	-7	-10.6%	-1	-1.4%

Mohawk Valley Supply Scenario 3a: Increased Retention of Physicians

Figure 9 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	75	8.5%	-32	-3.2%	35	3.8%	101	11.8%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	75	8.5%	-32	-3.2%	35	3.8%	101	11.8%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	75	8.5%	-32	-3.2%	35	3.8%	101	11.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-32	-3.7%	-139	-14.1%	-73	-7.9%	-7	-0.8%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-32	-3.7%	-139	-14.1%	-73	-7.9%	-7	-0.8%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-32	-3.7%	-139	-14.1%	-73	-7.9%	-7	-0.8%

Figure 10 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	16	4.3%	-12	-2.9%	-1	-0.2%	16	4.3%
Non-Primary Care	59	11.6%	-20	-3.5%	36	6.7%	85	17.5%
25% Primary Care/75% Non-Primary Care								
Primary Care	14	3.8%	-13	-3.4%	-3	-0.7%	14	3.8%
Non-Primary Care	61	12.0%	-18	-3.1%	38	7.1%	87	17.9%
20% Primary Care/80% Non-Primary Care								
Primary Care	13	3.4%	-15	-3.7%	-4	-1.0%	13	3.4%
Non-Primary Care	62	12.2%	-17	-2.9%	39	7.3%	88	18.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-27	-7.2%	-54	-13.5%	-43	-11.2%	-27	-7.2%
Non-Primary Care	-6	-1.1%	-85	-14.5%	-29	-5.5%	20	4.1%
25% Primary Care/75% Non-Primary Care								
Primary Care	-28	-7.6%	-56	-14.0%	-45	-11.6%	-28	-7.6%
Non-Primary Care	-4	-0.8%	-84	-14.2%	-28	-5.2%	21	4.4%
20% Primary Care/80% Non-Primary Care								
Primary Care	-29	-7.9%	-57	-14.2%	-46	-11.9%	-29	-7.9%
Non-Primary Care	-3	-0.6%	-83	-14.0%	-27	-5.0%	22	4.6%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 11 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	16	4.3%	-12	-2.9%	-1	-0.2%	16	4.3%
General/Family Medicine	3	1.3%	-12	-5.6%	-4	-2.0%	3	1.3%
General Internal Medicine	2	1.3%	-8	-5.7%	-6	-4.6%	2	1.3%
General Pediatrics	12	27.5%	8	18.7%	10	21.7%	12	27.5%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	14	3.8%	-13	-3.4%	-3	-0.7%	14	3.8%
General/Family Medicine	2	0.8%	-13	-6.1%	-5	-2.5%	2	0.8%
General Internal Medicine	1	0.8%	-9	-6.1%	-7	-5.0%	1	0.8%
General Pediatrics	11	26.8%	8	18.1%	9	21.1%	11	26.8%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	13	3.4%	-15	-3.7%	-4	-1.0%	13	3.4%
General/Family Medicine	1	0.5%	-13	-6.4%	-6	-2.8%	1	0.5%
General Internal Medicine	1	0.5%	-9	-6.4%	-7	-5.3%	1	0.5%
General Pediatrics	11	26.5%	8	17.8%	9	20.7%	11	26.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-27	-7.2%	-54	-13.5%	-43	-11.2%	-27	-7.2%
General/Family Medicine	-17	-8.8%	-32	-15.0%	-24	-11.8%	-17	-8.8%
General Internal Medicine	-15	-11.7%	-25	-17.7%	-23	-16.8%	-15	-11.7%
General Pediatrics	6	14.6%	3	6.7%	4	9.3%	6	14.6%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-28	-7.6%	-56	-14.0%	-45	-11.6%	-28	-7.6%
General/Family Medicine	-18	-9.2%	-33	-15.5%	-25	-12.2%	-18	-9.2%
General Internal Medicine	-16	-12.1%	-26	-18.1%	-24	-17.2%	-16	-12.1%
General Pediatrics	6	14.0%	3	6.2%	4	8.8%	6	14.0%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-29	-7.9%	-57	-14.2%	-46	-11.9%	-29	-7.9%
General/Family Medicine	-19	-9.5%	-33	-15.7%	-25	-12.5%	-19	-9.5%
General Internal Medicine	-16	-12.3%	-26	-18.4%	-24	-17.4%	-16	-12.3%
General Pediatrics	6	13.7%	3	5.9%	4	8.5%	6	13.7%

Non-Primary Care Specialties

Figure 12 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	6	20.2%	1	2.9%	4	15.3%	7	26.5%
Other Internal Medicine Subspecialties	22	39.7%	13	19.6%	19	32.1%	25	47.1%
Obstetrics and Gynecology	7	21.1%	5	12.8%	5	15.5%	9	27.5%
Pathology	-5	-23.0%	-8	-34.0%	-6	-27.4%	-4	-18.9%
25% Primary Care/75% Non-Primary Care								
Cardiology	6	20.6%	1	3.3%	5	15.7%	7	27.0%
Other Internal Medicine Subspecialties	23	40.2%	13	20.0%	19	32.6%	25	47.6%
Obstetrics and Gynecology	7	21.5%	5	13.2%	6	15.9%	9	27.9%
Pathology	-5	-22.7%	-8	-33.8%	-6	-27.1%	-4	-18.6%
20% Primary Care/80% Non-Primary Care								
Cardiology	6	20.9%	1	3.5%	5	15.9%	7	27.2%
Other Internal Medicine Subspecialties	23	40.5%	13	20.3%	19	32.8%	25	47.9%
Obstetrics and Gynecology	7	21.8%	5	13.4%	6	16.2%	9	28.2%
Pathology	-5	-22.5%	-8	-33.7%	-6	-27.0%	-4	-18.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	2	5.8%	-3	-9.4%	0	1.5%	3	11.4%
Other Internal Medicine Subspecialties	13	22.8%	3	5.1%	10	16.1%	16	29.2%
Obstetrics and Gynecology	2	7.0%	0	-0.3%	1	2.1%	4	12.7%
Pathology	-7	-32.4%	-10	-42.1%	-8	-36.2%	-6	-28.8%
25% Primary Care/75% Non-Primary Care								
Cardiology	2	6.2%	-3	-9.1%	1	1.8%	3	11.8%
Other Internal Medicine Subspecialties	13	23.2%	4	5.5%	10	16.5%	16	29.7%
Obstetrics and Gynecology	2	7.4%	0	0.0%	1	2.4%	4	13.0%
Pathology	-7	-32.1%	-10	-41.9%	-8	-36.0%	-6	-28.6%
20% Primary Care/80% Non-Primary Care								
Cardiology	2	6.4%	-3	-8.9%	1	2.0%	3	12.0%
Other Internal Medicine Subspecialties	13	23.4%	4	5.7%	10	16.7%	16	29.9%
Obstetrics and Gynecology	3	7.6%	0	0.2%	1	2.6%	4	13.3%
Pathology	-7	-32.0%	-10	-41.8%	-8	-35.9%	-6	-28.4%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-5	-8.3%	-15	-21.5%	-8	-12.5%	-2	-3.5%
Anesthesiology	3	6.8%	-5	-8.5%	1	1.3%	6	12.4%
Radiology	7	14.9%	-1	-1.6%	4	8.4%	10	21.0%
Emergency Medicine	21	66.8%	18	55.4%	22	75.2%	22	75.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-5	-8.0%	-15	-21.2%	-8	-12.2%	-2	-3.2%
Anesthesiology	4	7.2%	-5	-8.2%	1	1.6%	6	12.8%
Radiology	8	15.3%	-1	-1.2%	5	8.8%	10	21.4%
Emergency Medicine	21	67.4%	19	55.9%	22	75.8%	22	76.2%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-5	-7.8%	-15	-21.1%	-8	-12.1%	-2	-3.0%
Anesthesiology	4	7.4%	-5	-8.0%	1	1.8%	6	13.0%
Radiology	8	15.6%	-1	-1.0%	5	9.0%	10	21.6%
Emergency Medicine	21	67.7%	19	56.2%	22	76.2%	23	76.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-12	-20.4%	-22	-31.8%	-15	-24.0%	-9	-16.2%
Anesthesiology	-2	-4.3%	-11	-18.0%	-5	-9.2%	0	0.8%
Radiology	2	3.1%	-7	-11.7%	-1	-2.7%	4	8.6%
Emergency Medicine	16	52.1%	14	41.6%	18	59.8%	18	60.1%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-12	-20.1%	-22	-31.6%	-15	-23.8%	-9	-15.9%
Anesthesiology	-2	-4.0%	-10	-17.8%	-5	-8.9%	1	1.1%
Radiology	2	3.5%	-7	-11.4%	-1	-2.4%	4	8.9%
Emergency Medicine	16	52.6%	14	42.1%	18	60.3%	18	60.6%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-12	-20.0%	-22	-31.5%	-15	-23.6%	-9	-15.8%
Anesthesiology	-2	-3.8%	-10	-17.6%	-5	-8.8%	1	1.3%
Radiology	2	3.7%	-7	-11.2%	-1	-2.2%	4	9.2%
Emergency Medicine	16	52.9%	14	42.4%	18	60.6%	18	60.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	5	16.8%	0	0.0%	4	10.8%	7	22.9%
Ophthalmology	-5	-24.6%	-9	-35.4%	-6	-26.1%	-4	-20.6%
Otolaryngology	0	-3.4%	-2	-17.3%	-1	-7.2%	0	1.7%
Orthopedic Surgery	3	10.1%	-2	-5.7%	1	3.5%	5	15.9%
25% Primary Care/75% Non-Primary Care								
General Surgery	5	17.1%	0	0.3%	4	11.1%	7	23.3%
Ophthalmology	-5	-24.3%	-9	-35.2%	-6	-25.9%	-4	-20.4%
Otolaryngology	0	-3.1%	-2	-17.0%	-1	-6.9%	0	2.0%
Orthopedic Surgery	4	10.5%	-2	-5.4%	1	3.9%	5	16.3%
20% Primary Care/80% Non-Primary Care								
General Surgery	6	17.4%	0	0.5%	4	11.4%	7	23.6%
Ophthalmology	-5	-24.2%	-9	-35.1%	-6	-25.7%	-4	-20.2%
Otolaryngology	0	-2.9%	-2	-16.8%	-1	-6.7%	0	2.2%
Orthopedic Surgery	4	10.7%	-2	-5.2%	1	4.1%	5	16.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	1	2.7%	-5	-12.1%	-1	-2.6%	2	8.1%
Ophthalmology	-7	-32.3%	-10	-42.0%	-7	-33.6%	-6	-28.7%
Otolaryngology	-1	-13.1%	-2	-25.6%	-1	-16.6%	-1	-8.6%
Orthopedic Surgery	-1	-2.6%	-7	-16.6%	-3	-8.4%	1	2.6%
25% Primary Care/75% Non-Primary Care								
General Surgery	1	3.0%	-4	-11.8%	-1	-2.3%	3	8.4%
Ophthalmology	-7	-32.0%	-10	-41.8%	-7	-33.4%	-6	-28.5%
Otolaryngology	-1	-12.8%	-2	-25.4%	-1	-16.3%	-1	-8.3%
Orthopedic Surgery	-1	-2.2%	-6	-16.3%	-3	-8.1%	1	2.9%
20% Primary Care/80% Non-Primary Care								
General Surgery	1	3.2%	-4	-11.6%	-1	-2.1%	3	8.6%
Ophthalmology	-7	-31.9%	-10	-41.7%	-7	-33.3%	-6	-28.3%
Otolaryngology	-1	-12.7%	-2	-25.2%	-1	-16.1%	-1	-8.1%
Orthopedic Surgery	-1	-2.0%	-6	-16.1%	-3	-7.9%	1	3.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-3	-22.5%	-5	-33.6%	-4	-26.5%	-2	-18.4%
Other Surgical Subspecialties	-1	-10.7%	-2	-23.5%	-1	-15.0%	0	-6.0%
Other Specialties	3	5.0%	-8	-10.1%	0	0.1%	6	10.5%
25% Primary Care/75% Non-Primary Care								
Urology	-3	-22.2%	-5	-33.4%	-4	-26.3%	-2	-18.1%
Other Surgical Subspecialties	-1	-10.4%	-2	-23.3%	-1	-14.7%	0	-5.7%
Other Specialties	3	5.3%	-7	-9.8%	0	0.5%	7	10.9%
20% Primary Care/80% Non-Primary Care								
Urology	-3	-22.0%	-5	-33.2%	-4	-26.1%	-2	-17.9%
Other Surgical Subspecialties	-1	-10.2%	-2	-23.1%	-1	-14.5%	0	-5.5%
Other Specialties	4	5.5%	-7	-9.6%	0	0.7%	7	11.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-4	-31.8%	-7	-41.6%	-5	-35.4%	-4	-28.2%
Other Surgical Subspecialties	-2	-24.6%	-3	-35.4%	-2	-28.2%	-2	-20.6%
Other Specialties	-5	-7.6%	-16	-20.8%	-8	-11.8%	-2	-2.7%
25% Primary Care/75% Non-Primary Care								
Urology	-4	-31.6%	-7	-41.4%	-5	-35.2%	-4	-28.0%
Other Surgical Subspecialties	-2	-24.3%	-3	-35.2%	-2	-27.9%	-2	-20.3%
Other Specialties	-5	-7.2%	-15	-20.6%	-8	-11.5%	-1	-2.4%
20% Primary Care/80% Non-Primary Care								
Urology	-4	-31.5%	-7	-41.3%	-5	-35.1%	-4	-27.9%
Other Surgical Subspecialties	-2	-24.2%	-3	-35.1%	-2	-27.8%	-2	-20.2%
Other Specialties	-5	-7.1%	-15	-20.4%	-8	-11.3%	-1	-2.2%

Mohawk Valley Supply Scenario 3b: Decreased Retention of Physicians

Figure 13 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	29	3.3%	-78	-7.9%	-11	-1.2%	54	6.4%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	29	3.3%	-78	-7.9%	-11	-1.2%	54	6.4%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	29	3.3%	-78	-7.9%	-11	-1.2%	54	6.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-72	-8.2%	-179	-18.1%	-112	-12.2%	-47	-5.5%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-72	-8.2%	-179	-18.1%	-112	-12.2%	-47	-5.5%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-72	-8.2%	-179	-18.1%	-112	-12.2%	-47	-5.5%

Figure 14 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	0	0.1%	-27	-6.7%	-16	-4.2%	0	0.1%
Non-Primary Care	28	5.6%	-51	-8.7%	5	0.9%	54	11.1%
25% Primary Care/75% Non-Primary Care								
Primary Care	2	0.6%	-25	-6.3%	-14	-3.7%	2	0.6%
Non-Primary Care	26	5.2%	-53	-9.0%	3	0.6%	52	10.7%
20% Primary Care/80% Non-Primary Care								
Primary Care	4	1.0%	-24	-6.0%	-13	-3.4%	4	1.0%
Non-Primary Care	25	5.0%	-54	-9.2%	2	0.4%	51	10.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-40	-10.7%	-67	-16.9%	-57	-14.6%	-40	-10.7%
Non-Primary Care	-32	-6.4%	-112	-19.0%	-56	-10.5%	-7	-1.4%
25% Primary Care/75% Non-Primary Care								
Primary Care	-38	-10.3%	-66	-16.5%	-55	-14.2%	-38	-10.3%
Non-Primary Care	-34	-6.7%	-114	-19.3%	-58	-10.8%	-9	-1.8%
20% Primary Care/80% Non-Primary Care								
Primary Care	-37	-10.0%	-65	-16.2%	-54	-13.9%	-37	-10.0%
Non-Primary Care	-35	-6.9%	-115	-19.5%	-59	-11.0%	-10	-2.0%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 15 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	0	0.1%	-27	-6.7%	-16	-4.2%	0	0.1%
General/Family Medicine	-5	-2.7%	-20	-9.4%	-12	-5.9%	-5	-2.7%
General Internal Medicine	-4	-2.7%	-13	-9.4%	-12	-8.4%	-4	-2.7%
General Pediatrics	9	22.4%	6	14.0%	7	16.8%	9	22.4%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	2	0.6%	-25	-6.3%	-14	-3.7%	2	0.6%
General/Family Medicine	-4	-2.2%	-19	-8.9%	-11	-5.4%	-4	-2.2%
General Internal Medicine	-3	-2.2%	-13	-9.0%	-11	-7.9%	-3	-2.2%
General Pediatrics	10	23.0%	7	14.6%	8	17.4%	10	23.0%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	4	1.0%	-24	-6.0%	-13	-3.4%	4	1.0%
General/Family Medicine	-4	-1.9%	-18	-8.6%	-10	-5.1%	-4	-1.9%
General Internal Medicine	-3	-1.9%	-12	-8.7%	-11	-7.6%	-3	-1.9%
General Pediatrics	10	23.4%	7	14.9%	8	17.8%	10	23.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-40	-10.7%	-67	-16.9%	-57	-14.6%	-40	-10.7%
General/Family Medicine	-24	-12.3%	-39	-18.3%	-31	-15.2%	-24	-12.3%
General Internal Medicine	-20	-15.1%	-30	-20.9%	-28	-20.0%	-20	-15.1%
General Pediatrics	4	10.2%	1	2.6%	2	5.1%	4	10.2%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-38	-10.3%	-66	-16.5%	-55	-14.2%	-38	-10.3%
General/Family Medicine	-23	-11.9%	-38	-17.9%	-30	-14.8%	-23	-11.9%
General Internal Medicine	-19	-14.6%	-29	-20.5%	-27	-19.6%	-19	-14.6%
General Pediatrics	4	10.7%	1	3.1%	2	5.7%	4	10.7%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-37	-10.0%	-65	-16.2%	-54	-13.9%	-37	-10.0%
General/Family Medicine	-23	-11.6%	-37	-17.7%	-30	-14.5%	-23	-11.6%
General Internal Medicine	-19	-14.4%	-29	-20.3%	-27	-19.3%	-19	-14.4%
General Pediatrics	5	11.0%	2	3.4%	3	6.0%	5	11.0%

Non-Primary Care Specialties

Figure 16 – Projected Difference Between Physician Supply and Demand in Mohawk Valley in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	4	13.7%	-1	-2.6%	3	9.0%	5	19.7%
Other Internal Medicine Subspecialties	18	32.2%	9	13.2%	15	25.0%	21	39.1%
Obstetrics and Gynecology	5	14.6%	2	6.7%	3	9.3%	6	20.6%
Pathology	-6	-27.1%	-9	-37.6%	-7	-31.3%	-5	-23.3%
25% Primary Care/75% Non-Primary Care								
Cardiology	4	13.3%	-1	-3.0%	3	8.6%	5	19.3%
Other Internal Medicine Subspecialties	18	31.7%	8	12.8%	15	24.5%	21	38.6%
Obstetrics and Gynecology	5	14.1%	2	6.3%	3	8.9%	6	20.2%
Pathology	-6	-27.4%	-9	-37.8%	-7	-31.5%	-5	-23.6%
20% Primary Care/80% Non-Primary Care								
Cardiology	4	13.1%	-1	-3.2%	2	8.4%	5	19.0%
Other Internal Medicine Subspecialties	18	31.4%	8	12.5%	14	24.3%	20	38.3%
Obstetrics and Gynecology	5	13.9%	2	6.1%	3	8.7%	6	19.9%
Pathology	-6	-27.5%	-9	-38.0%	-7	-31.7%	-5	-23.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	0	0.3%	-5	-14.1%	-1	-3.9%	1	5.5%
Other Internal Medicine Subspecialties	9	16.3%	0	-0.4%	6	10.0%	12	22.4%
Obstetrics and Gynecology	0	1.4%	-2	-5.6%	-1	-3.3%	2	6.7%
Pathology	-8	-35.9%	-11	-45.1%	-9	-39.6%	-6	-32.6%
25% Primary Care/75% Non-Primary Care								
Cardiology	0	-0.1%	-5	-14.4%	-1	-4.2%	1	5.2%
Other Internal Medicine Subspecialties	9	15.9%	0	-0.8%	6	9.6%	12	22.0%
Obstetrics and Gynecology	0	1.0%	-2	-5.9%	-1	-3.6%	2	6.3%
Pathology	-8	-36.2%	-11	-45.3%	-9	-39.8%	-7	-32.8%
20% Primary Care/80% Non-Primary Care								
Cardiology	0	-0.3%	-5	-14.6%	-1	-4.4%	1	4.9%
Other Internal Medicine Subspecialties	9	15.6%	-1	-1.0%	6	9.4%	12	21.7%
Obstetrics and Gynecology	0	0.8%	-2	-6.1%	-1	-3.8%	2	6.1%
Pathology	-8	-36.3%	-11	-45.4%	-9	-39.9%	-7	-32.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-8	-13.3%	-18	-25.7%	-11	-17.3%	-5	-8.7%
Anesthesiology	1	1.0%	-8	-13.5%	-2	-4.2%	3	6.4%
Radiology	4	8.7%	-4	-6.9%	1	2.5%	7	14.4%
Emergency Medicine	18	57.8%	16	47.0%	19	65.8%	19	66.1%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-8	-13.6%	-18	-26.0%	-11	-17.6%	-5	-9.0%
Anesthesiology	0	0.7%	-8	-13.8%	-2	-4.5%	3	6.0%
Radiology	4	8.3%	-4	-7.2%	1	2.2%	7	14.0%
Emergency Medicine	18	57.2%	15	46.4%	19	65.2%	19	65.5%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-8	-13.8%	-18	-26.2%	-11	-17.7%	-5	-9.2%
Anesthesiology	0	0.5%	-8	-14.0%	-3	-4.7%	3	5.7%
Radiology	4	8.1%	-4	-7.4%	1	1.9%	7	13.8%
Emergency Medicine	18	56.9%	15	46.1%	19	64.8%	19	65.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-15	-24.6%	-25	-35.4%	-18	-28.1%	-12	-20.6%
Anesthesiology	-5	-9.3%	-13	-22.4%	-7	-14.0%	-2	-4.6%
Radiology	-1	-2.3%	-10	-16.3%	-4	-7.9%	1	2.8%
Emergency Medicine	14	44.1%	11	34.2%	15	51.3%	15	51.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-15	-24.9%	-25	-35.6%	-18	-28.3%	-12	-20.9%
Anesthesiology	-5	-9.7%	-13	-22.6%	-8	-14.3%	-2	-4.9%
Radiology	-1	-2.6%	-10	-16.6%	-4	-8.2%	1	2.5%
Emergency Medicine	14	43.6%	11	33.7%	15	50.8%	15	51.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-15	-25.0%	-25	-35.8%	-18	-28.5%	-12	-21.1%
Anesthesiology	-5	-9.9%	-13	-22.8%	-8	-14.5%	-2	-5.1%
Radiology	-1	-2.8%	-10	-16.8%	-4	-8.4%	1	2.3%
Emergency Medicine	13	43.3%	11	33.4%	15	50.5%	15	50.8%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	3	10.4%	-2	-5.4%	2	4.8%	5	16.3%
Ophthalmology	-6	-28.7%	-10	-38.9%	-6	-30.1%	-5	-24.9%
Otolaryngology	-1	-8.6%	-2	-21.8%	-1	-12.2%	0	-3.8%
Orthopedic Surgery	1	4.2%	-4	-10.8%	-1	-2.1%	3	9.6%
25% Primary Care/75% Non-Primary Care								
General Surgery	3	10.0%	-2	-5.8%	1	4.4%	5	15.8%
Ophthalmology	-6	-28.9%	-10	-39.1%	-7	-30.4%	-5	-25.2%
Otolaryngology	-1	-9.0%	-2	-22.0%	-1	-12.6%	0	-4.2%
Orthopedic Surgery	1	3.8%	-4	-11.1%	-1	-2.4%	3	9.3%
20% Primary Care/80% Non-Primary Care								
General Surgery	3	9.8%	-2	-6.0%	1	4.2%	5	15.6%
Ophthalmology	-6	-29.1%	-10	-39.3%	-7	-30.5%	-5	-25.4%
Otolaryngology	-1	-9.2%	-2	-22.2%	-1	-12.7%	0	-4.4%
Orthopedic Surgery	1	3.6%	-4	-11.3%	-1	-2.6%	3	9.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-1	-2.8%	-6	-16.7%	-3	-7.8%	1	2.3%
Ophthalmology	-8	-35.8%	-11	-45.1%	-8	-37.1%	-6	-32.5%
Otolaryngology	-1	-17.7%	-3	-29.5%	-2	-21.0%	-1	-13.4%
Orthopedic Surgery	-3	-7.7%	-8	-21.0%	-5	-13.2%	-1	-2.9%
25% Primary Care/75% Non-Primary Care								
General Surgery	-1	-3.1%	-6	-17.0%	-3	-8.1%	1	2.0%
Ophthalmology	-8	-36.1%	-11	-45.2%	-8	-37.4%	-7	-32.7%
Otolaryngology	-1	-18.0%	-3	-29.8%	-2	-21.2%	-1	-13.7%
Orthopedic Surgery	-3	-8.0%	-8	-21.2%	-5	-13.5%	-1	-3.2%
20% Primary Care/80% Non-Primary Care								
General Surgery	-1	-3.3%	-6	-17.2%	-3	-8.3%	1	1.8%
Ophthalmology	-8	-36.2%	-11	-45.4%	-8	-37.5%	-7	-32.8%
Otolaryngology	-1	-18.2%	-3	-29.9%	-2	-21.4%	-1	-13.9%
Orthopedic Surgery	-3	-8.2%	-8	-21.4%	-5	-13.7%	-1	-3.4%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-4	-26.7%	-6	-37.2%	-5	-30.5%	-3	-22.8%
Other Surgical Subspecialties	-1	-15.6%	-3	-27.7%	-2	-19.6%	-1	-11.1%
Other Specialties	0	-0.7%	-11	-15.0%	-4	-5.3%	3	4.5%
25% Primary Care/75% Non-Primary Care								
Urology	-4	-26.9%	-6	-37.4%	-5	-30.8%	-3	-23.1%
Other Surgical Subspecialties	-1	-15.9%	-3	-27.9%	-2	-19.9%	-1	-11.4%
Other Specialties	-1	-1.1%	-11	-15.3%	-4	-5.6%	3	4.1%
20% Primary Care/80% Non-Primary Care								
Urology	-4	-27.1%	-6	-37.6%	-5	-30.9%	-3	-23.2%
Other Surgical Subspecialties	-1	-16.0%	-3	-28.1%	-2	-20.0%	-1	-11.6%
Other Specialties	-1	-1.3%	-12	-15.5%	-4	-5.8%	2	3.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-5	-35.4%	-7	-44.7%	-6	-38.8%	-4	-32.0%
Other Surgical Subspecialties	-2	-28.6%	-4	-38.8%	-3	-32.0%	-2	-24.8%
Other Specialties	-8	-12.4%	-19	-25.0%	-11	-16.5%	-5	-7.8%
25% Primary Care/75% Non-Primary Care								
Urology	-5	-35.7%	-7	-44.9%	-6	-39.0%	-4	-32.3%
Other Surgical Subspecialties	-2	-28.8%	-4	-39.0%	-3	-32.2%	-2	-25.1%
Other Specialties	-8	-12.7%	-19	-25.3%	-11	-16.8%	-5	-8.2%
20% Primary Care/80% Non-Primary Care								
Urology	-5	-35.8%	-7	-45.0%	-6	-39.2%	-4	-32.4%
Other Surgical Subspecialties	-2	-29.0%	-4	-39.2%	-3	-32.3%	-2	-25.2%
Other Specialties	-8	-12.9%	-19	-25.4%	-11	-16.9%	-5	-8.3%

Relationship between Physician Supply and Demand in New York City 2030

New York City Supply Scenario 1: Baseline

Figure 1 – Projected Difference Between Physician Supply and Demand in New York City in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>All Physicians</i>	-4,565	-9.5%	-10,763	-19.9%	-6,938	-13.8%	-2,967	-6.4%
Supply responsive to demand								
<i>All Physicians</i>	-2,108	-4.4%	-8,306	-15.3%	-4,481	-8.9%	-510	-1.1%

Figure 2 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care</i>	-1,972	-12.3%	-3,153	-18.3%	-2,851	-16.9%	-1,972	-12.3%
<i>Non-Primary Care</i>	-2,593	-8.1%	-7,610	-20.6%	-4,086	-12.2%	-995	-3.3%
Supply responsive to demand								
<i>Primary Care</i>	-1,223	-7.6%	-2,404	-14.0%	-2,103	-12.4%	-1,223	-7.6%
<i>Non-Primary Care</i>	-884	-2.8%	-5,901	-16.0%	-2,378	-7.1%	713	2.3%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 3 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care (Overall)</i>	-1,972	-12.3%	-3,153	-18.3%	-2,851	-16.9%	-1,972	-12.3%
<i>General/Family Medicine</i>	-367	-17.6%	-521	-23.3%	-438	-20.3%	-367	-17.6%
<i>General Internal Medicine</i>	-1,837	-17.3%	-2,618	-23.0%	-2,486	-22.1%	-1,837	-17.3%
<i>General Pediatrics</i>	232	7.0%	-14	-0.4%	73	2.1%	232	7.0%
Supply responsive to demand								
<i>Primary Care (Overall)</i>	-1,223	-7.6%	-2,404	-14.0%	-2,103	-12.4%	-1,223	-7.6%
<i>General/Family Medicine</i>	-220	-10.5%	-373	-16.7%	-290	-13.5%	-220	-10.5%
<i>General Internal Medicine</i>	-1,416	-13.4%	-2,197	-19.3%	-2,065	-18.4%	-1,416	-13.4%
<i>General Pediatrics</i>	413	12.4%	166	4.6%	253	7.2%	413	12.4%

Non-Primary Care Specialties

Figure 4 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Cardiology	-52	-3.3%	-317	-17.2%	-120	-7.3%	27	1.8%
Other Internal Medicine Subspecialties	809	13.0%	-232	-3.2%	453	6.9%	1,119	19.0%
Obstetrics and Gynecology	-17	-0.8%	-175	-7.6%	-120	-5.3%	91	4.5%
Pathology	-396	-38.0%	-571	-46.9%	-460	-41.5%	-344	-34.7%
Supply responsive to demand								
Cardiology	48	3.1%	-216	-11.7%	-19	-1.2%	127	8.5%
Other Internal Medicine Subspecialties	1,213	19.5%	171	2.4%	856	13.0%	1,523	25.8%
Obstetrics and Gynecology	90	4.2%	-68	-3.0%	-14	-0.6%	198	9.7%
Pathology	-356	-34.1%	-532	-43.6%	-420	-37.9%	-304	-30.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Psychiatry	-1,113	-25.8%	-1,837	-36.5%	-1,322	-29.2%	-898	-21.9%
Anesthesiology	-268	-12.1%	-638	-24.8%	-388	-16.7%	-157	-7.5%
Radiology	-117	-5.5%	-473	-19.1%	-245	-10.9%	-11	-0.5%
Emergency Medicine	573	38.9%	464	29.3%	643	45.9%	646	46.2%
Supply responsive to demand								
Psychiatry	-970	-22.5%	-1,693	-33.6%	-1,178	-26.1%	-754	-18.4%
Anesthesiology	-150	-6.8%	-521	-20.2%	-271	-11.6%	-40	-1.9%
Radiology	9	0.4%	-347	-14.0%	-119	-5.3%	115	5.7%
Emergency Medicine	708	48.1%	600	37.9%	779	55.5%	782	55.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
General Surgery	-104	-5.9%	-397	-19.4%	-198	-10.7%	-16	-1.0%
Ophthalmology	-489	-37.5%	-709	-46.5%	-517	-38.8%	-424	-34.2%
Otolaryngology	-99	-20.3%	-181	-31.8%	-119	-23.4%	-75	-16.1%
Orthopedic Surgery	-121	-11.1%	-304	-23.8%	-190	-16.4%	-66	-6.4%
Supply responsive to demand								
General Surgery	-1	-0.1%	-295	-14.4%	-96	-5.2%	86	5.2%
Ophthalmology	-445	-34.1%	-664	-43.5%	-472	-35.4%	-379	-30.6%
Otolaryngology	-75	-15.4%	-157	-27.6%	-95	-18.8%	-51	-11.0%
Orthopedic Surgery	-56	-5.1%	-239	-18.8%	-126	-10.8%	-1	-0.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Urology	-214	-38.2%	-307	-47.1%	-245	-41.5%	-186	-35.0%
Other Surgical Subspecialties	-276	-31.3%	-423	-41.1%	-320	-34.6%	-232	-27.7%
Other Supecialties	-709	-14.9%	-1,510	-27.1%	-939	-18.8%	-470	-10.4%
Supply responsive to demand								
Urology	-188	-33.6%	-282	-43.2%	-219	-37.1%	-160	-30.1%
Other Surgical Subspecialties	-234	-26.6%	-382	-37.1%	-278	-30.1%	-190	-22.7%
Other Specialties	-477	-10.0%	-1,278	-22.9%	-707	-14.1%	-238	-5.3%

New York City Supply Scenario 2: NP/PA High and Lower Growth

Figure 5 – Projected Difference Between Physician Supply and Demand in New York City in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	355	0.7%	-5,843	-10.8%	-2,018	-4.0%	1,952	4.2%
NP/PA Lower Growth								
<i>All Physicians</i>	-2,181	-4.5%	-8,379	-15.5%	-4,554	-9.0%	-584	-1.3%
Supply responsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	3,032	6.3%	-3,166	-5.8%	659	1.3%	4,630	10.0%
NP/PA Lower Growth								
<i>All Physicians</i>	355	0.7%	-5,843	-10.8%	-2,018	-4.0%	1,952	4.2%

Figure 6 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care	314	2.0%	-867	-5.0%	-566	-3.3%	314	2.0%
Non-Primary Care	41	0.1%	-4,976	-13.5%	-1,452	-4.3%	1,639	5.4%
NP/PA Lower Growth								
Primary Care	-895	-5.6%	-2,076	-12.1%	-1,774	-10.5%	-895	-5.6%
Non-Primary Care	-1,286	-4.0%	-6,303	-17.1%	-2,780	-8.3%	311	1.0%
Supply responsive to demand								
NP/PA High Growth								
Primary Care	1,251	7.8%	70	0.4%	372	2.2%	1,251	7.8%
Non-Primary Care	1,781	5.6%	-3,236	-8.8%	288	0.9%	3,379	11.1%
NP/PA Lower Growth								
Primary Care	-27	-0.2%	-1,208	-7.0%	-906	-5.4%	-27	-0.2%
Non-Primary Care	382	1.2%	-4,635	-12.5%	-1,112	-3.3%	1,979	6.5%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 7 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care (Overall)	314	2.0%	-867	-5.0%	-566	-3.3%	314	2.0%
General/Family Medicine	-88	-4.2%	-242	-10.8%	-159	-7.4%	-88	-4.2%
General Internal Medicine	-411	-3.9%	-1,193	-10.5%	-1,061	-9.4%	-411	-3.9%
General Pediatrics	813	24.4%	567	15.8%	654	18.7%	813	24.4%
NP/PA Lower Growth								
Primary Care (Overall)	-895	-5.6%	-2,076	-12.1%	-1,774	-10.5%	-895	-5.6%
General/Family Medicine	-236	-11.3%	-389	-17.4%	-306	-14.2%	-236	-11.3%
General Internal Medicine	-1,165	-11.0%	-1,946	-17.1%	-1,814	-16.1%	-1,165	-11.0%
General Pediatrics	506	15.2%	260	7.3%	346	9.9%	506	15.2%
Supply responsive to demand								
NP/PA High Growth								
Primary Care (Overall)	1,251	7.8%	70	0.4%	372	2.2%	1,251	7.8%
General/Family Medicine	92	4.4%	-62	-2.8%	22	1.0%	92	4.4%
General Internal Medicine	119	1.1%	-662	-5.8%	-530	-4.7%	119	1.1%
General Pediatrics	1,040	31.2%	794	22.2%	880	25.2%	1,040	31.2%
NP/PA Lower Growth								
Primary Care (Overall)	-27	-0.2%	-1,208	-7.0%	-906	-5.4%	-27	-0.2%
General/Family Medicine	-69	-3.3%	-223	-9.9%	-139	-6.5%	-69	-3.3%
General Internal Medicine	-674	-6.4%	-1,455	-12.8%	-1,323	-11.8%	-674	-6.4%
General Pediatrics	716	21.5%	470	13.1%	556	15.9%	716	21.5%

Non-Primary Care Specialties

Figure 8 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Cardiology	85	5.4%	-180	-9.8%	17	1.0%	163	10.9%
Other Internal Medicine Subspecialties	1,439	23.2%	397	5.5%	1,082	16.5%	1,749	29.7%
Obstetrics and Gynecology	175	8.1%	16	0.7%	71	3.2%	283	13.8%
Pathology	-338	-32.4%	-513	-42.1%	-402	-36.3%	-286	-28.8%
NP/PA Lower Growth								
Cardiology	16	1.0%	-249	-13.5%	-52	-3.2%	94	6.3%
Other Internal Medicine Subspecialties	1,121	18.1%	80	1.1%	765	11.7%	1,432	24.3%
Obstetrics and Gynecology	79	3.6%	-80	-3.5%	-25	-1.1%	186	9.1%
Pathology	-368	-35.2%	-543	-44.5%	-431	-38.9%	-315	-31.8%
Supply responsive to demand								
NP/PA High Growth								
Cardiology	188	11.9%	-77	-4.2%	120	7.3%	266	17.8%
Other Internal Medicine Subspecialties	1,850	29.8%	808	11.1%	1,493	22.7%	2,160	36.6%
Obstetrics and Gynecology	283	13.1%	124	5.4%	179	7.9%	390	19.1%
Pathology	-297	-28.5%	-473	-38.8%	-361	-32.6%	-245	-24.7%
NP/PA Lower Growth								
Cardiology	114	7.3%	-150	-8.2%	47	2.8%	193	12.9%
Other Internal Medicine Subspecialties	1,515	24.4%	474	6.5%	1,159	17.7%	1,826	31.0%
Obstetrics and Gynecology	182	8.4%	23	1.0%	78	3.5%	289	14.1%
Pathology	-328	-31.5%	-504	-41.3%	-392	-35.4%	-276	-27.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Psychiatry	-826	-19.2%	-1,550	-30.8%	-1,035	-22.9%	-611	-14.9%
Anesthesiology	-94	-4.2%	-464	-18.0%	-214	-9.2%	17	0.8%
Radiology	63	3.0%	-293	-11.8%	-65	-2.9%	169	8.4%
Emergency Medicine	756	51.3%	648	41.0%	827	59.0%	830	59.3%
NP/PA Lower Growth								
Psychiatry	-971	-22.5%	-1,694	-33.6%	-1,179	-26.1%	-755	-18.4%
Anesthesiology	-181	-8.2%	-552	-21.4%	-302	-13.0%	-71	-3.4%
Radiology	-28	-1.3%	-384	-15.5%	-156	-6.9%	79	3.9%
Emergency Medicine	664	45.1%	555	35.1%	734	52.4%	738	52.7%
Supply responsive to demand								
NP/PA High Growth								
Psychiatry	-683	-15.8%	-1,406	-27.9%	-891	-19.7%	-467	-11.4%
Anesthesiology	26	1.2%	-344	-13.4%	-95	-4.1%	136	6.5%
Radiology	192	9.0%	-164	-6.6%	64	2.8%	298	14.8%
Emergency Medicine	895	60.8%	787	49.7%	966	68.9%	969	69.2%
NP/PA Lower Growth								
Psychiatry	-833	-19.3%	-1,557	-30.9%	-1,041	-23.0%	-618	-15.1%
Anesthesiology	-67	-3.0%	-437	-16.9%	-187	-8.0%	44	2.1%
Radiology	96	4.5%	-260	-10.5%	-32	-1.4%	202	10.0%
Emergency Medicine	797	54.1%	688	43.5%	868	61.9%	871	62.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
General Surgery	44	2.5%	-249	-12.2%	-50	-2.7%	132	7.9%
Ophthalmology	-416	-31.9%	-635	-41.7%	-443	-33.3%	-351	-28.3%
Otolaryngology	-64	-13.2%	-146	-25.6%	-84	-16.6%	-40	-8.6%
Orthopedic Surgery	-34	-3.1%	-217	-17.0%	-103	-8.9%	21	2.0%
NP/PA Lower Growth								
General Surgery	-30	-1.7%	-324	-15.8%	-125	-6.8%	57	3.4%
Ophthalmology	-453	-34.7%	-672	-44.1%	-480	-36.0%	-388	-31.3%
Otolaryngology	-82	-16.8%	-163	-28.7%	-102	-20.0%	-57	-12.4%
Orthopedic Surgery	-77	-7.1%	-260	-20.4%	-147	-12.7%	-23	-2.2%
Supply responsive to demand								
NP/PA High Growth								
General Surgery	149	8.5%	-144	-7.1%	54	3.0%	237	14.2%
Ophthalmology	-371	-28.4%	-590	-38.7%	-398	-29.8%	-305	-24.6%
Otolaryngology	-40	-8.2%	-121	-21.4%	-60	-11.8%	-15	-3.3%
Orthopedic Surgery	33	3.0%	-150	-11.8%	-37	-3.2%	87	8.4%
NP/PA Lower Growth								
General Surgery	70	4.0%	-223	-10.9%	-24	-1.3%	158	9.5%
Ophthalmology	-410	-31.4%	-629	-41.2%	-437	-32.8%	-344	-27.8%
Otolaryngology	-58	-12.0%	-140	-24.6%	-78	-15.4%	-34	-7.3%
Orthopedic Surgery	-14	-1.3%	-197	-15.4%	-83	-7.2%	41	3.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Urology	-183	-32.7%	-277	-42.4%	-214	-36.2%	-155	-29.2%
Other Surgical Subspecialties	-221	-25.1%	-369	-35.9%	-265	-28.7%	-177	-21.2%
Other Specialties	-344	-7.2%	-1,145	-20.5%	-574	-11.5%	-106	-2.3%
NP/PA Lower Growth								
Urology	-198	-35.5%	-292	-44.8%	-229	-38.9%	-170	-32.1%
Other Surgical Subspecialties	-249	-28.2%	-396	-38.5%	-293	-31.6%	-205	-24.4%
Other Specialties	-528	-11.1%	-1,329	-23.8%	-758	-15.2%	-290	-6.4%
Supply responsive to demand								
NP/PA High Growth								
Urology	-156	-27.9%	-250	-38.3%	-187	-31.7%	-128	-24.1%
Other Surgical Subspecialties	-179	-20.3%	-326	-31.7%	-223	-24.1%	-135	-16.1%
Other Specialties	-108	-2.3%	-909	-16.3%	-339	-6.8%	130	2.9%
NP/PA Lower Growth								
Urology	-173	-30.9%	-267	-40.8%	-204	-34.6%	-145	-27.3%
Other Surgical Subspecialties	-208	-23.6%	-355	-34.6%	-252	-27.2%	-164	-19.6%
Other Specialties	-302	-6.3%	-1,102	-19.8%	-532	-10.6%	-63	-1.4%

New York City Supply Scenario 3a: Increased Retention of Physicians

Figure 9 – Projected Difference Between Physician Supply and Demand in New York City in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-3,517	-7.3%	-9,715	-17.9%	-5,890	-11.7%	-1,920	-4.1%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-3,517	-7.3%	-9,715	-17.9%	-5,890	-11.7%	-1,920	-4.1%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-3,517	-7.3%	-9,715	-17.9%	-5,890	-11.7%	-1,920	-4.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-1,002	-2.1%	-7,200	-13.3%	-3,375	-6.7%	595	1.3%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-1,002	-2.1%	-7,200	-13.3%	-3,375	-6.7%	595	1.3%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-1,002	-2.1%	-7,200	-13.3%	-3,375	-6.7%	595	1.3%

Figure 10 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-1,623	-10.1%	-2,804	-16.3%	-2,503	-14.8%	-1,623	-10.1%
Non-Primary Care	-1,894	-5.9%	-6,911	-18.7%	-3,387	-10.1%	-296	-1.0%
25% Primary Care/75% Non-Primary Care								
Primary Care	-1,710	-10.7%	-2,891	-16.8%	-2,590	-15.3%	-1,710	-10.7%
Non-Primary Care	-1,807	-5.7%	-6,824	-18.5%	-3,300	-9.9%	-209	-0.7%
20% Primary Care/80% Non-Primary Care								
Primary Care	-1,763	-11.0%	-2,943	-17.1%	-2,642	-15.6%	-1,763	-11.0%
Non-Primary Care	-1,754	-5.5%	-6,772	-18.3%	-3,248	-9.7%	-157	-0.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-855	-5.3%	-2,036	-11.8%	-1,734	-10.3%	-855	-5.3%
Non-Primary Care	-147	-0.5%	-5,164	-14.0%	-1,640	-4.9%	1,451	4.8%
25% Primary Care/75% Non-Primary Care								
Primary Care	-947	-5.9%	-2,128	-12.4%	-1,826	-10.8%	-947	-5.9%
Non-Primary Care	-55	-0.2%	-5,072	-13.7%	-1,549	-4.6%	1,542	5.1%
20% Primary Care/80% Non-Primary Care								
Primary Care	-1,002	-6.3%	-2,183	-12.7%	-1,882	-11.1%	-1,002	-6.3%
Non-Primary Care	0	0.0%	-5,017	-13.6%	-1,493	-4.5%	1,598	5.3%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 11 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-1,623	-10.1%	-2,804	-16.3%	-2,503	-14.8%	-1,623	-10.1%
General/Family Medicine	-325	-15.6%	-478	-21.4%	-395	-18.4%	-325	-15.6%
General Internal Medicine	-1,619	-15.3%	-2,401	-21.1%	-2,269	-20.2%	-1,619	-15.3%
General Pediatrics	321	9.6%	75	2.1%	161	4.6%	321	9.6%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-1,710	-10.7%	-2,891	-16.8%	-2,590	-15.3%	-1,710	-10.7%
General/Family Medicine	-335	-16.1%	-489	-21.9%	-406	-18.8%	-335	-16.1%
General Internal Medicine	-1,674	-15.8%	-2,455	-21.6%	-2,323	-20.7%	-1,674	-15.8%
General Pediatrics	299	9.0%	53	1.5%	139	4.0%	299	9.0%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-1,763	-11.0%	-2,943	-17.1%	-2,642	-15.6%	-1,763	-11.0%
General/Family Medicine	-342	-16.4%	-495	-22.2%	-412	-19.1%	-342	-16.4%
General Internal Medicine	-1,706	-16.1%	-2,487	-21.9%	-2,356	-21.0%	-1,706	-16.1%
General Pediatrics	285	8.6%	39	1.1%	126	3.6%	285	8.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-855	-5.3%	-2,036	-11.8%	-1,734	-10.3%	-855	-5.3%
General/Family Medicine	-173	-8.3%	-327	-14.6%	-244	-11.3%	-173	-8.3%
General Internal Medicine	-1,188	-11.2%	-1,969	-17.3%	-1,837	-16.3%	-1,188	-11.2%
General Pediatrics	506	15.2%	260	7.3%	346	9.9%	506	15.2%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-947	-5.9%	-2,128	-12.4%	-1,826	-10.8%	-947	-5.9%
General/Family Medicine	-185	-8.9%	-338	-15.1%	-255	-11.9%	-185	-8.9%
General Internal Medicine	-1,245	-11.7%	-2,026	-17.8%	-1,894	-16.8%	-1,245	-11.7%
General Pediatrics	483	14.5%	237	6.6%	323	9.2%	483	14.5%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-1,002	-6.3%	-2,183	-12.7%	-1,882	-11.1%	-1,002	-6.3%
General/Family Medicine	-192	-9.2%	-345	-15.4%	-262	-12.2%	-192	-9.2%
General Internal Medicine	-1,279	-12.1%	-2,060	-18.1%	-1,928	-17.2%	-1,279	-12.1%
General Pediatrics	469	14.0%	223	6.2%	309	8.8%	469	14.0%

Non-Primary Care Specialties

Figure 12 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	-16	-1.0%	-280	-15.2%	-84	-5.1%	63	4.2%
Other Internal Medicine Subspecialties	976	15.7%	-65	-0.9%	620	9.4%	1,287	21.8%
Obstetrics and Gynecology	34	1.6%	-124	-5.4%	-70	-3.1%	142	6.9%
Pathology	-381	-36.5%	-556	-45.6%	-444	-40.1%	-329	-33.2%
25% Primary Care/75% Non-Primary Care								
Cardiology	-11	-0.7%	-276	-15.0%	-79	-4.8%	67	4.5%
Other Internal Medicine Subspecialties	997	16.1%	-45	-0.6%	641	9.8%	1,307	22.2%
Obstetrics and Gynecology	41	1.9%	-118	-5.1%	-63	-2.8%	148	7.3%
Pathology	-379	-36.3%	-554	-45.5%	-442	-39.9%	-327	-33.0%
20% Primary Care/80% Non-Primary Care								
Cardiology	-9	-0.6%	-273	-14.8%	-76	-4.6%	70	4.7%
Other Internal Medicine Subspecialties	1,009	16.3%	-32	-0.4%	653	9.9%	1,320	22.4%
Obstetrics and Gynecology	44	2.1%	-114	-4.9%	-59	-2.6%	152	7.4%
Pathology	-378	-36.2%	-553	-45.4%	-441	-39.8%	-326	-32.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	87	5.5%	-178	-9.7%	19	1.2%	166	11.1%
Other Internal Medicine Subspecialties	1,389	22.4%	348	4.8%	1,033	15.7%	1,700	28.8%
Obstetrics and Gynecology	144	6.7%	-15	-0.7%	40	1.8%	251	12.3%
Pathology	-340	-32.6%	-515	-42.3%	-403	-36.4%	-288	-29.0%
25% Primary Care/75% Non-Primary Care								
Cardiology	92	5.8%	-173	-9.4%	24	1.5%	170	11.4%
Other Internal Medicine Subspecialties	1,411	22.7%	370	5.1%	1,055	16.1%	1,721	29.2%
Obstetrics and Gynecology	150	7.0%	-9	-0.4%	46	2.1%	258	12.6%
Pathology	-338	-32.4%	-513	-42.1%	-401	-36.2%	-286	-28.8%
20% Primary Care/80% Non-Primary Care								
Cardiology	94	6.0%	-170	-9.2%	27	1.6%	173	11.6%
Other Internal Medicine Subspecialties	1,424	22.9%	383	5.3%	1,068	16.3%	1,735	29.4%
Obstetrics and Gynecology	154	7.2%	-5	-0.2%	50	2.2%	262	12.8%
Pathology	-337	-32.3%	-512	-42.0%	-400	-36.1%	-285	-28.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-1,037	-24.1%	-1,760	-35.0%	-1,245	-27.6%	-822	-20.1%
Anesthesiology	-222	-10.0%	-592	-23.0%	-342	-14.7%	-111	-5.3%
Radiology	-69	-3.3%	-426	-17.1%	-197	-8.8%	37	1.8%
Emergency Medicine	622	42.2%	513	32.4%	692	49.4%	695	49.7%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-1,028	-23.8%	-1,751	-34.8%	-1,236	-27.3%	-812	-19.8%
Anesthesiology	-216	-9.8%	-586	-22.7%	-337	-14.5%	-106	-5.0%
Radiology	-63	-3.0%	-420	-16.9%	-191	-8.5%	43	2.1%
Emergency Medicine	628	42.6%	519	32.8%	698	49.8%	701	50.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-1,022	-23.7%	-1,745	-34.7%	-1,230	-27.2%	-807	-19.7%
Anesthesiology	-212	-9.6%	-583	-22.6%	-333	-14.3%	-102	-4.9%
Radiology	-60	-2.8%	-416	-16.8%	-188	-8.3%	47	2.3%
Emergency Medicine	631	42.9%	523	33.0%	702	50.0%	705	50.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-890	-20.6%	-1,613	-32.0%	-1,098	-24.3%	-675	-16.5%
Anesthesiology	-102	-4.6%	-472	-18.3%	-222	-9.5%	9	0.4%
Radiology	60	2.8%	-297	-12.0%	-69	-3.0%	166	8.2%
Emergency Medicine	760	51.6%	651	41.2%	831	59.2%	834	59.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-880	-20.4%	-1,604	-31.8%	-1,088	-24.1%	-665	-16.2%
Anesthesiology	-96	-4.3%	-466	-18.1%	-216	-9.3%	15	0.7%
Radiology	66	3.1%	-290	-11.7%	-62	-2.8%	172	8.5%
Emergency Medicine	766	52.0%	658	41.6%	837	59.7%	840	60.0%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-874	-20.3%	-1,598	-31.7%	-1,083	-23.9%	-659	-16.1%
Anesthesiology	-92	-4.2%	-462	-17.9%	-213	-9.1%	18	0.9%
Radiology	70	3.3%	-287	-11.6%	-58	-2.6%	176	8.7%
Emergency Medicine	770	52.3%	662	41.8%	841	60.0%	844	60.3%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-64	-3.7%	-358	-17.5%	-159	-8.6%	23	1.4%
Ophthalmology	-470	-36.0%	-689	-45.2%	-497	-37.3%	-405	-32.6%
Otolaryngology	-90	-18.4%	-171	-30.1%	-110	-21.6%	-65	-14.1%
Orthopedic Surgery	-98	-8.9%	-281	-22.0%	-167	-14.4%	-43	-4.2%
25% Primary Care/75% Non-Primary Care								
General Surgery	-60	-3.4%	-353	-17.3%	-154	-8.4%	28	1.7%
Ophthalmology	-468	-35.8%	-687	-45.0%	-495	-37.1%	-402	-32.4%
Otolaryngology	-89	-18.2%	-170	-29.9%	-108	-21.4%	-64	-13.9%
Orthopedic Surgery	-95	-8.7%	-278	-21.8%	-164	-14.1%	-40	-3.9%
20% Primary Care/80% Non-Primary Care								
General Surgery	-57	-3.2%	-350	-17.1%	-151	-8.2%	31	1.9%
Ophthalmology	-466	-35.7%	-685	-44.9%	-493	-37.0%	-401	-32.3%
Otolaryngology	-88	-18.0%	-169	-29.8%	-108	-21.3%	-63	-13.7%
Orthopedic Surgery	-93	-8.5%	-276	-21.7%	-162	-14.0%	-38	-3.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	41	2.3%	-253	-12.4%	-54	-2.9%	128	7.7%
Ophthalmology	-424	-32.5%	-643	-42.2%	-451	-33.9%	-359	-28.9%
Otolaryngology	-65	-13.4%	-147	-25.9%	-85	-16.8%	-41	-8.9%
Orthopedic Surgery	-31	-2.9%	-214	-16.8%	-101	-8.7%	23	2.2%
25% Primary Care/75% Non-Primary Care								
General Surgery	46	2.6%	-248	-12.1%	-49	-2.7%	133	8.0%
Ophthalmology	-422	-32.3%	-641	-42.0%	-449	-33.7%	-356	-28.7%
Otolaryngology	-64	-13.2%	-146	-25.6%	-84	-16.6%	-40	-8.6%
Orthopedic Surgery	-28	-2.6%	-211	-16.6%	-98	-8.4%	26	2.5%
20% Primary Care/80% Non-Primary Care								
General Surgery	49	2.8%	-245	-12.0%	-46	-2.5%	136	8.2%
Ophthalmology	-420	-32.2%	-639	-41.9%	-447	-33.6%	-355	-28.6%
Otolaryngology	-63	-13.0%	-145	-25.5%	-83	-16.4%	-39	-8.4%
Orthopedic Surgery	-27	-2.4%	-210	-16.4%	-96	-8.3%	28	2.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-206	-36.8%	-299	-45.8%	-237	-40.1%	-178	-33.4%
Other Surgical Subspecialties	-261	-29.6%	-409	-39.7%	-305	-33.0%	-217	-25.9%
Other Specialties	-612	-12.8%	-1,413	-25.3%	-842	-16.8%	-374	-8.2%
25% Primary Care/75% Non-Primary Care								
Urology	-204	-36.6%	-298	-45.7%	-236	-39.9%	-177	-33.2%
Other Surgical Subspecialties	-259	-29.4%	-407	-39.6%	-303	-32.8%	-215	-25.7%
Other Specialties	-600	-12.6%	-1,401	-25.1%	-830	-16.6%	-362	-8.0%
20% Primary Care/80% Non-Primary Care								
Urology	-204	-36.5%	-298	-45.6%	-235	-39.8%	-176	-33.1%
Other Surgical Subspecialties	-258	-29.3%	-406	-39.5%	-302	-32.7%	-214	-25.6%
Other Specialties	-593	-12.4%	-1,393	-25.0%	-823	-16.5%	-354	-7.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-179	-32.1%	-273	-41.8%	-210	-35.6%	-151	-28.5%
Other Surgical Subspecialties	-219	-24.8%	-367	-35.6%	-263	-28.4%	-175	-20.9%
Other Specialties	-375	-7.9%	-1,176	-21.1%	-605	-12.1%	-136	-3.0%
25% Primary Care/75% Non-Primary Care								
Urology	-178	-31.9%	-272	-41.6%	-209	-35.4%	-150	-28.3%
Other Surgical Subspecialties	-217	-24.6%	-365	-35.4%	-261	-28.2%	-173	-20.6%
Other Specialties	-362	-7.6%	-1,163	-20.9%	-592	-11.8%	-124	-2.7%
20% Primary Care/80% Non-Primary Care								
Urology	-177	-31.7%	-271	-41.5%	-208	-35.3%	-150	-28.2%
Other Surgical Subspecialties	-216	-24.5%	-363	-35.3%	-260	-28.1%	-172	-20.5%
Other Specialties	-355	-7.4%	-1,155	-20.7%	-585	-11.7%	-116	-2.6%

New York City Supply Scenario 3b: Decreased Retention of Physicians

Figure 13 – Projected Difference Between Physician Supply and Demand in New York City in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-5,613	-11.7%	-11,811	-21.8%	-7,986	-15.9%	-4,015	-8.7%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-5,613	-11.7%	-11,811	-21.8%	-7,986	-15.9%	-4,015	-8.7%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-5,613	-11.7%	-11,811	-21.8%	-7,986	-15.9%	-4,015	-8.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-3,213	-6.7%	-9,411	-17.4%	-5,586	-11.1%	-1,616	-3.5%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-3,213	-6.7%	-9,411	-17.4%	-5,586	-11.1%	-1,616	-3.5%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-3,213	-6.7%	-9,411	-17.4%	-5,586	-11.1%	-1,616	-3.5%

Figure 14 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-2,321	-14.5%	-3,502	-20.4%	-3,200	-18.9%	-2,321	-14.5%
Non-Primary Care	-3,292	-10.3%	-8,309	-22.5%	-4,785	-14.3%	-1,694	-5.6%
25% Primary Care/75% Non-Primary Care								
Primary Care	-2,234	-14.0%	-3,415	-19.9%	-3,113	-18.4%	-2,234	-14.0%
Non-Primary Care	-3,378	-10.6%	-8,396	-22.7%	-4,872	-14.6%	-1,781	-5.9%
20% Primary Care/80% Non-Primary Care								
Primary Care	-2,182	-13.6%	-3,363	-19.6%	-3,061	-18.1%	-2,182	-13.6%
Non-Primary Care	-3,431	-10.7%	-8,448	-22.9%	-4,925	-14.7%	-1,834	-6.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-1,591	-9.9%	-2,772	-16.1%	-2,471	-14.6%	-1,591	-9.9%
Non-Primary Care	-1,622	-5.1%	-6,639	-18.0%	-3,115	-9.3%	-24	-0.1%
25% Primary Care/75% Non-Primary Care								
Primary Care	-1,500	-9.4%	-2,681	-15.6%	-2,379	-14.1%	-1,500	-9.4%
Non-Primary Care	-1,713	-5.4%	-6,731	-18.2%	-3,207	-9.6%	-116	-0.4%
20% Primary Care/80% Non-Primary Care								
Primary Care	-1,444	-9.0%	-2,625	-15.3%	-2,324	-13.8%	-1,444	-9.0%
Non-Primary Care	-1,769	-5.5%	-6,786	-18.4%	-3,262	-9.8%	-171	-0.6%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 15 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-2,321	-14.5%	-3,502	-20.4%	-3,200	-18.9%	-2,321	-14.5%
General/Family Medicine	-410	-19.7%	-564	-25.2%	-481	-22.3%	-410	-19.7%
General Internal Medicine	-2,055	-19.4%	-2,836	-24.9%	-2,704	-24.1%	-2,055	-19.4%
General Pediatrics	144	4.3%	-102	-2.9%	-16	-0.5%	144	4.3%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-2,234	-14.0%	-3,415	-19.9%	-3,113	-18.4%	-2,234	-14.0%
General/Family Medicine	-399	-19.2%	-553	-24.7%	-470	-21.8%	-399	-19.2%
General Internal Medicine	-2,000	-18.9%	-2,782	-24.5%	-2,650	-23.6%	-2,000	-18.9%
General Pediatrics	166	5.0%	-80	-2.2%	6	0.2%	166	5.0%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-2,182	-13.6%	-3,363	-19.6%	-3,061	-18.1%	-2,182	-13.6%
General/Family Medicine	-393	-18.9%	-547	-24.4%	-464	-21.5%	-393	-18.9%
General Internal Medicine	-1,968	-18.6%	-2,749	-24.2%	-2,617	-23.3%	-1,968	-18.6%
General Pediatrics	179	5.4%	-67	-1.9%	19	0.6%	179	5.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-1,591	-9.9%	-2,772	-16.1%	-2,471	-14.6%	-1,591	-9.9%
General/Family Medicine	-266	-12.8%	-420	-18.8%	-337	-15.6%	-266	-12.8%
General Internal Medicine	-1,645	-15.5%	-2,426	-21.3%	-2,294	-20.4%	-1,645	-15.5%
General Pediatrics	319	9.6%	73	2.0%	160	4.6%	319	9.6%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-1,500	-9.4%	-2,681	-15.6%	-2,379	-14.1%	-1,500	-9.4%
General/Family Medicine	-254	-12.2%	-408	-18.2%	-325	-15.1%	-254	-12.2%
General Internal Medicine	-1,588	-15.0%	-2,369	-20.8%	-2,237	-19.9%	-1,588	-15.0%
General Pediatrics	342	10.3%	96	2.7%	183	5.2%	342	10.3%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-1,444	-9.0%	-2,625	-15.3%	-2,324	-13.8%	-1,444	-9.0%
General/Family Medicine	-248	-11.9%	-401	-17.9%	-318	-14.8%	-248	-11.9%
General Internal Medicine	-1,553	-14.7%	-2,335	-20.5%	-2,203	-19.6%	-1,553	-14.7%
General Pediatrics	356	10.7%	110	3.1%	197	5.6%	356	10.7%

Non-Primary Care Specialties

Figure 16 – Projected Difference Between Physician Supply and Demand in New York City in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	-89	-5.6%	-353	-19.2%	-156	-9.5%	-10	-0.7%
Other Internal Medicine Subspecialties	642	10.3%	-400	-5.5%	285	4.3%	952	16.1%
Obstetrics and Gynecology	-67	-3.1%	-226	-9.8%	-171	-7.6%	40	2.0%
Pathology	-412	-39.4%	-587	-48.1%	-475	-42.9%	-360	-36.3%
25% Primary Care/75% Non-Primary Care								
Cardiology	-93	-5.9%	-358	-19.4%	-161	-9.8%	-14	-1.0%
Other Internal Medicine Subspecialties	621	10.0%	-420	-5.8%	265	4.0%	932	15.8%
Obstetrics and Gynecology	-74	-3.4%	-232	-10.1%	-178	-7.9%	34	1.7%
Pathology	-414	-39.6%	-589	-48.3%	-477	-43.1%	-362	-36.5%
20% Primary Care/80% Non-Primary Care								
Cardiology	-96	-6.1%	-360	-19.6%	-163	-9.9%	-17	-1.1%
Other Internal Medicine Subspecialties	609	9.8%	-433	-6.0%	252	3.8%	919	15.6%
Obstetrics and Gynecology	-78	-3.6%	-236	-10.2%	-181	-8.0%	30	1.5%
Pathology	-415	-39.7%	-590	-48.4%	-478	-43.2%	-363	-36.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	10	0.6%	-255	-13.8%	-58	-3.5%	88	5.9%
Other Internal Medicine Subspecialties	1,037	16.7%	-5	-0.1%	680	10.4%	1,347	22.8%
Obstetrics and Gynecology	37	1.7%	-122	-5.3%	-67	-3.0%	145	7.1%
Pathology	-373	-35.7%	-548	-44.9%	-436	-39.4%	-321	-32.3%
25% Primary Care/75% Non-Primary Care								
Cardiology	5	0.3%	-260	-14.1%	-63	-3.8%	84	5.6%
Other Internal Medicine Subspecialties	1,015	16.3%	-27	-0.4%	658	10.0%	1,325	22.5%
Obstetrics and Gynecology	30	1.4%	-128	-5.6%	-73	-3.3%	138	6.8%
Pathology	-375	-35.9%	-550	-45.1%	-438	-39.6%	-323	-32.5%
20% Primary Care/80% Non-Primary Care								
Cardiology	2	0.1%	-263	-14.3%	-66	-4.0%	81	5.4%
Other Internal Medicine Subspecialties	1,001	16.1%	-40	-0.6%	645	9.8%	1,312	22.2%
Obstetrics and Gynecology	26	1.2%	-132	-5.7%	-77	-3.4%	134	6.6%
Pathology	-376	-36.0%	-551	-45.2%	-439	-39.7%	-324	-32.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-1,190	-27.6%	-1,913	-38.0%	-1,398	-30.9%	-974	-23.8%
Anesthesiology	-314	-14.2%	-684	-26.5%	-435	-18.7%	-204	-9.7%
Radiology	-165	-7.8%	-521	-21.0%	-293	-13.0%	-58	-2.9%
Emergency Medicine	524	35.6%	415	26.3%	595	42.4%	598	42.7%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-1,199	-27.8%	-1,922	-38.2%	-1,407	-31.1%	-983	-24.0%
Anesthesiology	-320	-14.5%	-690	-26.8%	-440	-18.9%	-209	-10.0%
Radiology	-171	-8.0%	-527	-21.2%	-299	-13.3%	-64	-3.2%
Emergency Medicine	518	35.2%	409	25.9%	589	42.0%	592	42.3%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-1,205	-27.9%	-1,928	-38.3%	-1,413	-31.3%	-989	-24.1%
Anesthesiology	-323	-14.6%	-693	-26.9%	-444	-19.1%	-213	-10.1%
Radiology	-174	-8.2%	-531	-21.4%	-302	-13.4%	-68	-3.4%
Emergency Medicine	514	34.9%	406	25.7%	585	41.7%	588	42.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-1,049	-24.3%	-1,772	-35.2%	-1,257	-27.8%	-833	-20.3%
Anesthesiology	-199	-9.0%	-569	-22.1%	-320	-13.7%	-89	-4.2%
Radiology	-42	-2.0%	-398	-16.0%	-170	-7.5%	65	3.2%
Emergency Medicine	656	44.6%	548	34.6%	727	51.8%	730	52.2%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-1,059	-24.6%	-1,782	-35.4%	-1,267	-28.0%	-843	-20.6%
Anesthesiology	-205	-9.3%	-575	-22.3%	-326	-14.0%	-95	-4.5%
Radiology	-48	-2.3%	-404	-16.3%	-176	-7.8%	58	2.9%
Emergency Medicine	650	44.1%	541	34.2%	721	51.4%	724	51.7%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-1,065	-24.7%	-1,788	-35.5%	-1,273	-28.2%	-849	-20.7%
Anesthesiology	-209	-9.5%	-579	-22.5%	-330	-14.2%	-99	-4.7%
Radiology	-52	-2.4%	-408	-16.4%	-180	-8.0%	54	2.7%
Emergency Medicine	646	43.9%	537	34.0%	717	51.1%	720	51.4%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-143	-8.2%	-436	-21.4%	-237	-12.9%	-55	-3.3%
Ophthalmology	-509	-39.0%	-728	-47.7%	-536	-40.2%	-444	-35.8%
Otolaryngology	-108	-22.2%	-190	-33.4%	-128	-25.3%	-84	-18.1%
Orthopedic Surgery	-144	-13.2%	-327	-25.6%	-213	-18.4%	-89	-8.6%
25% Primary Care/75% Non-Primary Care								
General Surgery	-148	-8.4%	-441	-21.6%	-242	-13.1%	-60	-3.6%
Ophthalmology	-511	-39.2%	-730	-47.9%	-538	-40.4%	-446	-36.0%
Otolaryngology	-109	-22.4%	-191	-33.6%	-129	-25.5%	-85	-18.4%
Orthopedic Surgery	-147	-13.4%	-330	-25.9%	-216	-18.6%	-92	-8.9%
20% Primary Care/80% Non-Primary Care								
General Surgery	-151	-8.6%	-444	-21.7%	-245	-13.3%	-63	-3.8%
Ophthalmology	-513	-39.3%	-732	-48.0%	-540	-40.5%	-448	-36.1%
Otolaryngology	-110	-22.6%	-192	-33.7%	-130	-25.6%	-86	-18.5%
Orthopedic Surgery	-148	-13.6%	-331	-26.0%	-218	-18.8%	-94	-9.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-43	-2.4%	-336	-16.4%	-137	-7.4%	45	2.7%
Ophthalmology	-465	-35.6%	-684	-44.9%	-492	-36.9%	-400	-32.2%
Otolaryngology	-85	-17.4%	-167	-29.3%	-105	-20.7%	-61	-13.1%
Orthopedic Surgery	-81	-7.4%	-264	-20.7%	-150	-12.9%	-26	-2.5%
25% Primary Care/75% Non-Primary Care								
General Surgery	-48	-2.7%	-341	-16.7%	-142	-7.7%	40	2.4%
Ophthalmology	-468	-35.8%	-687	-45.0%	-495	-37.1%	-402	-32.4%
Otolaryngology	-86	-17.7%	-168	-29.5%	-106	-20.9%	-62	-13.3%
Orthopedic Surgery	-84	-7.7%	-267	-20.9%	-153	-13.2%	-29	-2.8%
20% Primary Care/80% Non-Primary Care								
General Surgery	-51	-2.9%	-344	-16.8%	-145	-7.9%	37	2.2%
Ophthalmology	-469	-35.9%	-688	-45.1%	-496	-37.2%	-404	-32.6%
Otolaryngology	-87	-17.8%	-169	-29.6%	-107	-21.1%	-62	-13.5%
Orthopedic Surgery	-85	-7.8%	-268	-21.1%	-155	-13.4%	-31	-3.0%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-222	-39.7%	-316	-48.4%	-253	-42.9%	-194	-36.5%
Other Surgical Subspecialties	-290	-32.9%	-438	-42.5%	-334	-36.1%	-246	-29.4%
Other Specialties	-806	-16.9%	-1,606	-28.8%	-1,036	-20.7%	-567	-12.5%
25% Primary Care/75% Non-Primary Care								
Urology	-223	-39.9%	-317	-48.5%	-254	-43.0%	-195	-36.7%
Other Surgical Subspecialties	-292	-33.1%	-440	-42.7%	-336	-36.3%	-248	-29.6%
Other Specialties	-818	-17.1%	-1,618	-29.0%	-1,048	-20.9%	-579	-12.8%
20% Primary Care/80% Non-Primary Care								
Urology	-224	-40.0%	-317	-48.6%	-255	-43.2%	-196	-36.8%
Other Surgical Subspecialties	-293	-33.2%	-441	-42.8%	-337	-36.4%	-249	-29.7%
Other Specialties	-825	-17.3%	-1,626	-29.2%	-1,055	-21.1%	-586	-12.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-197	-35.2%	-291	-44.5%	-228	-38.6%	-169	-31.8%
Other Surgical Subspecialties	-249	-28.3%	-397	-38.6%	-294	-31.7%	-205	-24.5%
Other Specialties	-579	-12.1%	-1,380	-24.8%	-809	-16.2%	-340	-7.5%
25% Primary Care/75% Non-Primary Care								
Urology	-198	-35.4%	-292	-44.7%	-229	-38.8%	-170	-32.0%
Other Surgical Subspecialties	-251	-28.5%	-399	-38.8%	-295	-31.9%	-207	-24.8%
Other Specialties	-592	-12.4%	-1,392	-25.0%	-822	-16.4%	-353	-7.8%
20% Primary Care/80% Non-Primary Care								
Urology	-199	-35.5%	-292	-44.8%	-230	-38.9%	-171	-32.1%
Other Surgical Subspecialties	-253	-28.7%	-400	-38.9%	-297	-32.1%	-208	-24.9%
Other Specialties	-599	-12.6%	-1,400	-25.1%	-829	-16.6%	-361	-8.0%

Relationship between Physician Supply and Demand in North Country 2030

North Country Supply Scenario 1: Baseline

Figure 1 – Projected Difference Between Physician Supply and Demand in North Country in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
All Physicians	-7	-0.8%	-108	-11.5%	-41	-4.7%	20	2.5%
Supply responsive to demand								
All Physicians	-19	-2.3%	-120	-12.8%	-54	-6.2%	8	0.9%

Figure 2 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Primary Care	-21	-7.1%	-44	-13.5%	-36	-11.3%	-21	-7.1%
Non-Primary Care	15	2.7%	-64	-10.4%	-6	-1.1%	42	8.2%
Supply responsive to demand								
Primary Care	-23	-7.6%	-45	-13.9%	-37	-11.7%	-23	-7.6%
Non-Primary Care	4	0.7%	-75	-12.2%	-17	-3.0%	31	6.0%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 3 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Primary Care (Overall)	-21	-7.1%	-44	-13.5%	-36	-11.3%	-21	-7.1%
General/Family Medicine	-14	-10.9%	-24	-17.0%	-19	-13.8%	-14	-10.9%
General Internal Medicine	-11	-9.5%	-20	-15.7%	-18	-14.7%	-11	-9.5%
General Pediatrics	4	7.4%	0	0.1%	1	2.5%	4	7.4%
Supply responsive to demand								
Primary Care (Overall)	-23	-7.6%	-45	-13.9%	-37	-11.7%	-23	-7.6%
General/Family Medicine	-14	-10.5%	-24	-16.7%	-18	-13.5%	-14	-10.5%
General Internal Medicine	-16	-13.4%	-24	-19.3%	-23	-18.4%	-16	-13.4%
General Pediatrics	7	12.4%	3	4.6%	4	7.2%	7	12.4%

Non-Primary Care Specialties

Figure 4 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Cardiology	0	4.8%	-1	-10.3%	0	0.5%	1	10.3%
Other Internal Medicine Subspecialties	14	24.2%	4	6.3%	11	17.4%	17	30.7%
Obstetrics and Gynecology	3	5.1%	-1	-2.1%	0	0.3%	5	10.6%
Pathology	-5	-30.0%	-7	-40.1%	-5	-34.0%	-4	-26.4%
Supply responsive to demand								
Cardiology	0	3.1%	-1	-11.7%	0	-1.2%	1	8.5%
Other Internal Medicine Subspecialties	12	19.5%	2	2.4%	8	13.0%	14	25.8%
Obstetrics and Gynecology	2	4.2%	-2	-3.0%	0	-0.6%	5	9.7%
Pathology	-5	-34.1%	-8	-43.6%	-6	-37.9%	-4	-30.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Psychiatry	-11	-19.9%	-19	-31.4%	-13	-23.5%	-8	-15.6%
Anesthesiology	-2	-4.0%	-8	-17.8%	-4	-9.0%	0	1.1%
Radiology	2	2.9%	-7	-11.8%	-2	-2.9%	4	8.4%
Emergency Medicine	33	46.2%	28	36.1%	36	53.5%	36	53.9%
Supply responsive to demand								
Psychiatry	-12	-22.5%	-21	-33.6%	-14	-26.1%	-9	-18.4%
Anesthesiology	-3	-6.8%	-9	-20.2%	-5	-11.6%	-1	-1.9%
Radiology	0	0.4%	-9	-14.0%	-3	-5.3%	3	5.7%
Emergency Medicine	34	48.1%	29	37.9%	38	55.5%	38	55.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
General Surgery	1	3.5%	-5	-11.4%	-1	-1.8%	3	8.9%
Ophthalmology	-8	-32.4%	-12	-42.1%	-8	-33.8%	-7	-28.9%
Otolaryngology	-2	-13.3%	-4	-25.7%	-2	-16.7%	-1	-8.7%
Orthopedic Surgery	-1	-3.9%	-6	-17.7%	-3	-9.6%	0	1.2%
Supply responsive to demand								
General Surgery	0	-0.1%	-6	-14.4%	-2	-5.2%	2	5.2%
Ophthalmology	-8	-34.1%	-12	-43.5%	-9	-35.4%	-7	-30.6%
Otolaryngology	-2	-15.4%	-4	-27.6%	-3	-18.8%	-1	-11.0%
Orthopedic Surgery	-2	-5.1%	-7	-18.8%	-4	-10.8%	0	-0.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Urology	-4	-31.3%	-6	-41.1%	-5	-34.9%	-3	-27.6%
Other Surgical Subspecialties	-2	-24.0%	-3	-34.9%	-2	-27.6%	-2	-20.0%
Other Supecialties	-5	-7.1%	-16	-20.4%	-8	-11.4%	-1	-2.2%
Supply responsive to demand								
Urology	-4	-33.6%	-7	-43.2%	-5	-37.1%	-4	-30.1%
Other Surgical Subspecialties	-2	-26.6%	-3	-37.1%	-3	-30.1%	-2	-22.7%
Other Specialties	-7	-10.0%	-18	-22.9%	-10	-14.1%	-3	-5.3%

North Country Supply Scenario 2: NP/PA High and Lower Growth

Figure 5 – Projected Difference Between Physician Supply and Demand in North Country in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	83	9.9%	-18	-1.9%	49	5.6%	110	13.6%
NP/PA Lower Growth								
<i>All Physicians</i>	34	4.1%	-67	-7.1%	-1	-0.1%	61	7.5%
Supply responsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	74	8.8%	-27	-2.9%	39	4.5%	101	12.4%
NP/PA Lower Growth								
<i>All Physicians</i>	25	3.0%	-76	-8.1%	-9	-1.1%	52	6.4%

Figure 6 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care	30	10.1%	8	2.5%	16	5.2%	30	10.1%
Non-Primary Care	53	9.9%	-26	-4.2%	32	5.8%	80	15.6%
NP/PA Lower Growth								
Primary Care	6	1.9%	-16	-5.1%	-8	-2.6%	6	1.9%
Non-Primary Care	28	5.3%	-50	-8.2%	8	1.4%	55	10.8%
Supply responsive to demand								
NP/PA High Growth								
Primary Care	24	7.9%	1	0.5%	10	3.0%	24	7.9%
Non-Primary Care	50	9.3%	-29	-4.7%	29	5.3%	77	15.1%
NP/PA Lower Growth								
Primary Care	0	-0.1%	-23	-7.0%	-14	-4.6%	0	-0.1%
Non-Primary Care	26	4.8%	-53	-8.6%	5	0.9%	53	10.3%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 7 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care (Overall)	30	10.1%	8	2.5%	16	5.2%	30	10.1%
General/Family Medicine	7	5.6%	-2	-1.7%	3	2.1%	7	5.6%
General Internal Medicine	8	7.3%	0	-0.1%	1	1.1%	8	7.3%
General Pediatrics	14	27.3%	11	18.6%	12	21.5%	14	27.3%
NP/PA Lower Growth								
Primary Care (Overall)	6	1.9%	-16	-5.1%	-8	-2.6%	6	1.9%
General/Family Medicine	-3	-2.2%	-13	-8.9%	-7	-5.4%	-3	-2.2%
General Internal Medicine	-1	-0.6%	-9	-7.5%	-8	-6.4%	-1	-0.6%
General Pediatrics	9	17.9%	6	9.8%	7	12.5%	9	17.9%
Supply responsive to demand								
NP/PA High Growth								
Primary Care (Overall)	24	7.9%	1	0.5%	10	3.0%	24	7.9%
General/Family Medicine	6	4.4%	-4	-2.8%	1	1.0%	6	4.4%
General Internal Medicine	1	1.1%	-7	-5.8%	-6	-4.7%	1	1.1%
General Pediatrics	17	31.2%	13	22.2%	14	25.2%	17	31.2%
NP/PA Lower Growth								
Primary Care (Overall)	0	-0.1%	-23	-7.0%	-14	-4.6%	0	-0.1%
General/Family Medicine	-4	-3.3%	-14	-9.9%	-9	-6.5%	-4	-3.3%
General Internal Medicine	-7	-6.4%	-16	-12.8%	-14	-11.8%	-7	-6.4%
General Pediatrics	11	21.5%	7	13.1%	9	15.9%	11	21.5%

Non-Primary Care Specialties

Figure 8 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Cardiology	1	12.0%	0	-4.1%	1	7.4%	2	17.9%
Other Internal Medicine Subspecialties	19	32.7%	9	13.7%	16	25.5%	22	39.7%
Obstetrics and Gynecology	6	12.4%	2	4.6%	4	7.2%	9	18.3%
Pathology	-4	-25.2%	-6	-36.0%	-5	-29.5%	-3	-21.3%
NP/PA Lower Growth								
Cardiology	1	7.4%	-1	-8.0%	0	3.0%	1	13.0%
Other Internal Medicine Subspecialties	16	27.2%	6	9.0%	13	20.3%	19	33.9%
Obstetrics and Gynecology	4	7.7%	0	0.3%	1	2.7%	6	13.4%
Pathology	-4	-28.3%	-7	-38.6%	-5	-32.4%	-3	-24.5%
Supply responsive to demand								
NP/PA High Growth								
Cardiology	1	11.9%	0	-4.2%	1	7.3%	2	17.8%
Other Internal Medicine Subspecialties	18	29.8%	8	11.1%	14	22.7%	21	36.6%
Obstetrics and Gynecology	7	13.1%	3	5.4%	4	7.9%	9	19.1%
Pathology	-4	-28.5%	-7	-38.8%	-5	-32.6%	-4	-24.7%
NP/PA Lower Growth								
Cardiology	1	7.3%	-1	-8.2%	0	2.8%	1	12.9%
Other Internal Medicine Subspecialties	14	24.4%	5	6.5%	11	17.7%	17	31.0%
Obstetrics and Gynecology	4	8.4%	1	1.0%	2	3.5%	7	14.1%
Pathology	-5	-31.5%	-7	-41.3%	-6	-35.4%	-4	-27.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Psychiatry	-8	-14.3%	-16	-26.6%	-10	-18.3%	-5	-9.8%
Anesthesiology	1	2.6%	-5	-12.1%	-1	-2.7%	3	8.1%
Radiology	5	10.1%	-3	-5.7%	2	3.8%	8	15.9%
Emergency Medicine	40	56.3%	35	45.5%	43	64.1%	44	64.5%
NP/PA Lower Growth								
Psychiatry	-9	-17.9%	-18	-29.7%	-12	-21.7%	-7	-13.5%
Anesthesiology	-1	-1.6%	-7	-15.7%	-3	-6.7%	1	3.6%
Radiology	3	5.5%	-6	-9.7%	0	-0.5%	5	11.0%
Emergency Medicine	35	49.8%	30	39.5%	39	57.3%	39	57.7%
Supply responsive to demand								
NP/PA High Growth								
Psychiatry	-8	-15.8%	-17	-27.9%	-11	-19.7%	-6	-11.4%
Anesthesiology	0	1.2%	-6	-13.4%	-2	-4.1%	2	6.5%
Radiology	5	9.0%	-4	-6.6%	2	2.8%	7	14.8%
Emergency Medicine	43	60.8%	38	49.7%	47	68.9%	47	69.2%
NP/PA Lower Growth								
Psychiatry	-10	-19.3%	-19	-30.9%	-13	-23.0%	-8	-15.1%
Anesthesiology	-1	-3.0%	-8	-16.9%	-3	-8.0%	1	2.1%
Radiology	2	4.5%	-6	-10.5%	-1	-1.4%	5	10.0%
Emergency Medicine	38	54.1%	33	43.5%	42	61.9%	42	62.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
General Surgery	4	10.6%	-2	-5.3%	2	4.9%	5	16.4%
Ophthalmology	-7	-27.8%	-11	-38.1%	-7	-29.2%	-5	-24.0%
Otolaryngology	-1	-7.3%	-3	-20.6%	-1	-10.9%	0	-2.4%
Orthopedic Surgery	1	2.8%	-4	-12.0%	-1	-3.4%	2	8.2%
NP/PA Lower Growth								
General Surgery	2	6.0%	-4	-9.2%	0	0.6%	4	11.6%
Ophthalmology	-7	-30.8%	-11	-40.7%	-8	-32.2%	-6	-27.1%
Otolaryngology	-1	-11.1%	-4	-23.9%	-2	-14.6%	-1	-6.4%
Orthopedic Surgery	0	-1.5%	-6	-15.6%	-2	-7.4%	1	3.7%
Supply responsive to demand								
NP/PA High Growth								
General Surgery	3	8.5%	-3	-7.1%	1	3.0%	5	14.2%
Ophthalmology	-7	-28.4%	-11	-38.7%	-7	-29.8%	-6	-24.6%
Otolaryngology	-1	-8.2%	-3	-21.4%	-2	-11.8%	0	-3.3%
Orthopedic Surgery	1	3.0%	-4	-11.8%	-1	-3.2%	2	8.4%
NP/PA Lower Growth								
General Surgery	1	4.0%	-4	-10.9%	0	-1.3%	3	9.5%
Ophthalmology	-8	-31.4%	-12	-41.2%	-8	-32.8%	-6	-27.8%
Otolaryngology	-2	-12.0%	-4	-24.6%	-2	-15.4%	-1	-7.3%
Orthopedic Surgery	0	-1.3%	-6	-15.4%	-2	-7.2%	1	3.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Urology	-3	-26.5%	-6	-37.1%	-4	-30.4%	-3	-22.6%
Other Surgical Subspecialties	-1	-18.7%	-3	-30.4%	-2	-22.6%	-1	-14.5%
Other Specialties	0	-0.7%	-12	-14.9%	-4	-5.2%	3	4.6%
NP/PA Lower Growth								
Urology	-4	-29.6%	-6	-39.7%	-5	-33.3%	-3	-25.9%
Other Surgical Subspecialties	-2	-22.1%	-3	-33.3%	-2	-25.8%	-1	-18.0%
Other Specialties	-3	-4.8%	-14	-18.5%	-6	-9.2%	0	0.2%
Supply responsive to demand								
NP/PA High Growth								
Urology	-4	-27.9%	-6	-38.3%	-4	-31.7%	-3	-24.1%
Other Surgical Subspecialties	-2	-20.3%	-3	-31.7%	-2	-24.1%	-1	-16.1%
Other Specialties	-2	-2.3%	-13	-16.3%	-5	-6.8%	2	2.9%
NP/PA Lower Growth								
Urology	-4	-30.9%	-6	-40.8%	-5	-34.6%	-3	-27.3%
Other Surgical Subspecialties	-2	-23.6%	-3	-34.6%	-2	-27.2%	-1	-19.6%
Other Specialties	-4	-6.3%	-15	-19.8%	-7	-10.6%	-1	-1.4%

North Country Supply Scenario 3a: Increased Retention of Physicians

Figure 9 – Projected Difference Between Physician Supply and Demand in North Country in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	13	1.6%	-88	-9.3%	-21	-2.5%	40	5.0%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	13	1.6%	-88	-9.3%	-21	-2.5%	40	5.0%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	13	1.6%	-88	-9.3%	-21	-2.5%	40	5.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	1	0.1%	-100	-10.7%	-34	-3.9%	27	3.4%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	1	0.1%	-100	-10.7%	-34	-3.9%	27	3.4%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	1	0.1%	-100	-10.7%	-34	-3.9%	27	3.4%

Figure 10 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-15	-4.9%	-37	-11.4%	-29	-9.2%	-15	-4.9%
Non-Primary Care	28	5.2%	-51	-8.2%	7	1.3%	55	10.8%
25% Primary Care/75% Non-Primary Care								
Primary Care	-16	-5.5%	-39	-12.0%	-31	-9.7%	-16	-5.5%
Non-Primary Care	30	5.5%	-49	-8.0%	9	1.6%	57	11.1%
20% Primary Care/80% Non-Primary Care								
Primary Care	-17	-5.8%	-40	-12.3%	-32	-10.0%	-17	-5.8%
Non-Primary Care	31	5.7%	-48	-7.8%	10	1.8%	58	11.3%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-16	-5.4%	-38	-11.9%	-30	-9.6%	-16	-5.4%
Non-Primary Care	17	3.1%	-62	-10.1%	-4	-0.7%	44	8.6%
25% Primary Care/75% Non-Primary Care								
Primary Care	-18	-6.0%	-40	-12.4%	-32	-10.2%	-18	-6.0%
Non-Primary Care	18	3.4%	-60	-9.8%	-2	-0.4%	45	8.9%
20% Primary Care/80% Non-Primary Care								
Primary Care	-19	-6.3%	-41	-12.7%	-33	-10.5%	-19	-6.3%
Non-Primary Care	19	3.6%	-59	-9.6%	-1	-0.2%	46	9.1%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 11 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-15	-4.9%	-37	-11.4%	-29	-9.2%	-15	-4.9%
General/Family Medicine	-12	-8.8%	-21	-15.1%	-16	-11.8%	-12	-8.8%
General Internal Medicine	-8	-7.3%	-17	-13.7%	-16	-12.7%	-8	-7.3%
General Pediatrics	5	10.0%	1	2.4%	3	5.0%	5	10.0%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-16	-5.5%	-39	-12.0%	-31	-9.7%	-16	-5.5%
General/Family Medicine	-12	-9.3%	-22	-15.5%	-17	-12.3%	-12	-9.3%
General Internal Medicine	-9	-7.8%	-18	-14.2%	-16	-13.2%	-9	-7.8%
General Pediatrics	5	9.4%	1	1.8%	2	4.4%	5	9.4%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-17	-5.8%	-40	-12.3%	-32	-10.0%	-17	-5.8%
General/Family Medicine	-13	-9.6%	-22	-15.8%	-17	-12.6%	-13	-9.6%
General Internal Medicine	-9	-8.2%	-18	-14.5%	-17	-13.5%	-9	-8.2%
General Pediatrics	5	9.0%	1	1.5%	2	4.0%	5	9.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-16	-5.4%	-38	-11.9%	-30	-9.6%	-16	-5.4%
General/Family Medicine	-11	-8.4%	-21	-14.7%	-16	-11.4%	-11	-8.4%
General Internal Medicine	-13	-11.3%	-22	-17.4%	-20	-16.4%	-13	-11.3%
General Pediatrics	8	15.0%	4	7.1%	5	9.8%	8	15.0%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-18	-6.0%	-40	-12.4%	-32	-10.2%	-18	-6.0%
General/Family Medicine	-12	-9.0%	-22	-15.2%	-16	-11.9%	-12	-9.0%
General Internal Medicine	-14	-11.8%	-22	-17.9%	-21	-16.9%	-14	-11.8%
General Pediatrics	8	14.4%	4	6.5%	5	9.1%	8	14.4%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-19	-6.3%	-41	-12.7%	-33	-10.5%	-19	-6.3%
General/Family Medicine	-12	-9.3%	-22	-15.5%	-17	-12.2%	-12	-9.3%
General Internal Medicine	-14	-12.1%	-23	-18.2%	-21	-17.2%	-14	-12.1%
General Pediatrics	7	14.0%	3	6.1%	5	8.8%	7	14.0%

Non-Primary Care Specialties

Figure 12 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	1	7.3%	-1	-8.1%	0	2.9%	1	13.0%
Other Internal Medicine Subspecialties	16	27.1%	6	8.9%	13	20.2%	19	33.8%
Obstetrics and Gynecology	4	7.6%	0	0.2%	1	2.7%	6	13.3%
Pathology	-4	-28.4%	-7	-38.6%	-5	-32.4%	-4	-24.6%
25% Primary Care/75% Non-Primary Care								
Cardiology	1	7.6%	-1	-7.8%	0	3.2%	1	13.3%
Other Internal Medicine Subspecialties	16	27.5%	6	9.2%	13	20.6%	19	34.2%
Obstetrics and Gynecology	4	7.9%	0	0.5%	2	3.0%	6	13.6%
Pathology	-4	-28.1%	-7	-38.5%	-5	-32.3%	-3	-24.4%
20% Primary Care/80% Non-Primary Care								
Cardiology	1	7.8%	-1	-7.7%	0	3.4%	1	13.5%
Other Internal Medicine Subspecialties	16	27.7%	6	9.4%	13	20.8%	19	34.5%
Obstetrics and Gynecology	4	8.1%	0	0.7%	2	3.2%	7	13.8%
Pathology	-4	-28.0%	-7	-38.4%	-5	-32.1%	-3	-24.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	1	5.6%	-1	-9.6%	0	1.2%	1	11.1%
Other Internal Medicine Subspecialties	13	22.4%	3	4.9%	10	15.8%	16	28.9%
Obstetrics and Gynecology	3	6.7%	0	-0.6%	1	1.8%	6	12.3%
Pathology	-5	-32.5%	-7	-42.2%	-6	-36.4%	-4	-29.0%
25% Primary Care/75% Non-Primary Care								
Cardiology	1	5.9%	-1	-9.3%	0	1.5%	1	11.4%
Other Internal Medicine Subspecialties	13	22.8%	4	5.2%	10	16.1%	16	29.3%
Obstetrics and Gynecology	4	7.0%	0	-0.3%	1	2.1%	6	12.7%
Pathology	-5	-32.3%	-7	-42.1%	-6	-36.2%	-4	-28.8%
20% Primary Care/80% Non-Primary Care								
Cardiology	1	6.1%	-1	-9.2%	0	1.7%	1	11.6%
Other Internal Medicine Subspecialties	14	23.0%	4	5.4%	10	16.3%	17	29.5%
Obstetrics and Gynecology	4	7.2%	0	-0.1%	1	2.3%	6	12.9%
Pathology	-5	-32.2%	-7	-42.0%	-6	-36.1%	-4	-28.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-9	-17.9%	-18	-29.7%	-12	-21.7%	-7	-13.6%
Anesthesiology	-1	-1.7%	-7	-15.8%	-3	-6.8%	1	3.5%
Radiology	3	5.4%	-6	-9.7%	0	-0.6%	5	11.0%
Emergency Medicine	35	49.7%	30	39.4%	39	57.2%	39	57.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-9	-17.7%	-18	-29.5%	-12	-21.5%	-7	-13.3%
Anesthesiology	-1	-1.4%	-7	-15.5%	-3	-6.5%	1	3.8%
Radiology	3	5.7%	-6	-9.4%	0	-0.3%	6	11.3%
Emergency Medicine	36	50.1%	30	39.8%	39	57.7%	39	58.0%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-9	-17.5%	-18	-29.4%	-12	-21.3%	-7	-13.2%
Anesthesiology	0	-1.2%	-7	-15.4%	-3	-6.3%	1	4.0%
Radiology	3	5.9%	-6	-9.3%	0	-0.1%	6	11.5%
Emergency Medicine	36	50.4%	31	40.1%	39	58.0%	39	58.3%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-11	-20.6%	-20	-32.0%	-13	-24.3%	-8	-16.4%
Anesthesiology	-2	-4.5%	-8	-18.3%	-4	-9.5%	0	0.5%
Radiology	1	2.9%	-7	-11.9%	-2	-3.0%	4	8.3%
Emergency Medicine	37	51.7%	31	41.3%	40	59.3%	40	59.7%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-11	-20.4%	-20	-31.8%	-13	-24.0%	-8	-16.2%
Anesthesiology	-2	-4.3%	-8	-18.0%	-4	-9.2%	0	0.8%
Radiology	2	3.2%	-7	-11.6%	-1	-2.7%	4	8.6%
Emergency Medicine	37	52.1%	32	41.7%	40	59.8%	41	60.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-11	-20.2%	-20	-31.7%	-13	-23.9%	-8	-16.0%
Anesthesiology	-2	-4.1%	-8	-17.9%	-4	-9.1%	0	1.0%
Radiology	2	3.4%	-7	-11.5%	-1	-2.5%	4	8.8%
Emergency Medicine	37	52.4%	32	41.9%	41	60.1%	41	60.4%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	2	6.0%	-4	-9.3%	0	0.5%	4	11.5%
Ophthalmology	-7	-30.8%	-11	-40.7%	-8	-32.2%	-6	-27.2%
Otolaryngology	-1	-11.2%	-4	-23.9%	-2	-14.7%	-1	-6.5%
Orthopedic Surgery	0	-1.5%	-6	-15.7%	-2	-7.4%	1	3.6%
25% Primary Care/75% Non-Primary Care								
General Surgery	2	6.3%	-4	-9.0%	0	0.8%	4	11.9%
Ophthalmology	-7	-30.6%	-11	-40.6%	-8	-32.0%	-6	-26.9%
Otolaryngology	-1	-10.9%	-4	-23.7%	-2	-14.4%	-1	-6.2%
Orthopedic Surgery	0	-1.2%	-6	-15.4%	-2	-7.2%	1	4.0%
20% Primary Care/80% Non-Primary Care								
General Surgery	2	6.5%	-4	-8.8%	0	1.0%	4	12.1%
Ophthalmology	-7	-30.5%	-11	-40.5%	-8	-31.9%	-6	-26.8%
Otolaryngology	-1	-10.7%	-4	-23.6%	-2	-14.3%	-1	-6.0%
Orthopedic Surgery	0	-1.1%	-6	-15.3%	-2	-7.0%	1	4.1%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	1	2.4%	-5	-12.3%	-1	-2.9%	3	7.8%
Ophthalmology	-8	-32.4%	-12	-42.1%	-8	-33.8%	-7	-28.9%
Otolaryngology	-2	-13.4%	-4	-25.8%	-2	-16.8%	-1	-8.8%
Orthopedic Surgery	-1	-2.8%	-6	-16.8%	-3	-8.6%	1	2.3%
25% Primary Care/75% Non-Primary Care								
General Surgery	1	2.7%	-5	-12.1%	-1	-2.6%	3	8.1%
Ophthalmology	-8	-32.2%	-12	-42.0%	-8	-33.6%	-7	-28.7%
Otolaryngology	-2	-13.1%	-4	-25.6%	-2	-16.5%	-1	-8.5%
Orthopedic Surgery	-1	-2.5%	-6	-16.5%	-3	-8.4%	1	2.6%
20% Primary Care/80% Non-Primary Care								
General Surgery	1	2.9%	-5	-11.9%	-1	-2.4%	3	8.3%
Ophthalmology	-8	-32.1%	-12	-41.9%	-8	-33.5%	-7	-28.6%
Otolaryngology	-2	-13.0%	-4	-25.5%	-2	-16.4%	-1	-8.4%
Orthopedic Surgery	-1	-2.4%	-6	-16.4%	-3	-8.2%	1	2.8%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-4	-29.6%	-6	-39.7%	-5	-33.3%	-3	-25.9%
Other Surgical Subspecialties	-2	-22.2%	-3	-33.3%	-2	-25.9%	-1	-18.1%
Other Specialties	-3	-4.8%	-14	-18.5%	-6	-9.2%	0	0.2%
25% Primary Care/75% Non-Primary Care								
Urology	-4	-29.4%	-6	-39.5%	-5	-33.1%	-3	-25.7%
Other Surgical Subspecialties	-2	-21.9%	-3	-33.1%	-2	-25.7%	-1	-17.8%
Other Specialties	-3	-4.6%	-14	-18.3%	-6	-9.0%	0	0.5%
20% Primary Care/80% Non-Primary Care								
Urology	-4	-29.3%	-6	-39.4%	-5	-33.0%	-3	-25.5%
Other Surgical Subspecialties	-2	-21.8%	-3	-33.0%	-2	-25.5%	-1	-17.7%
Other Specialties	-3	-4.4%	-14	-18.1%	-6	-8.8%	0	0.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-4	-32.0%	-6	-41.8%	-5	-35.6%	-4	-28.4%
Other Surgical Subspecialties	-2	-24.8%	-3	-35.6%	-2	-28.4%	-2	-20.8%
Other Specialties	-5	-7.8%	-16	-21.0%	-8	-12.0%	-2	-3.0%
25% Primary Care/75% Non-Primary Care								
Urology	-4	-31.8%	-6	-41.6%	-5	-35.4%	-3	-28.2%
Other Surgical Subspecialties	-2	-24.6%	-3	-35.4%	-2	-28.2%	-2	-20.6%
Other Specialties	-5	-7.5%	-16	-20.8%	-8	-11.8%	-2	-2.7%
20% Primary Care/80% Non-Primary Care								
Urology	-4	-31.7%	-6	-41.5%	-5	-35.3%	-3	-28.1%
Other Surgical Subspecialties	-2	-24.4%	-3	-35.3%	-2	-28.0%	-2	-20.5%
Other Specialties	-5	-7.4%	-16	-20.7%	-8	-11.6%	-2	-2.5%

North Country Supply Scenario 3b: Decreased Retention of Physicians

Figure 13 – Projected Difference Between Physician Supply and Demand in North Country in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-27	-3.2%	-128	-13.6%	-61	-7.0%	0	0.0%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-27	-3.2%	-128	-13.6%	-61	-7.0%	0	0.0%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-27	-3.2%	-128	-13.6%	-61	-7.0%	0	0.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-39	-4.6%	-140	-14.9%	-74	-8.4%	-12	-1.5%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-39	-4.6%	-140	-14.9%	-74	-8.4%	-12	-1.5%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-39	-4.6%	-140	-14.9%	-74	-8.4%	-12	-1.5%

Figure 14 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-28	-9.3%	-50	-15.6%	-42	-13.4%	-28	-9.3%
Non-Primary Care	1	0.3%	-77	-12.5%	-19	-3.4%	28	5.5%
25% Primary Care/75% Non-Primary Care								
Primary Care	-26	-8.8%	-49	-15.0%	-41	-12.9%	-26	-8.8%
Non-Primary Care	0	0.0%	-79	-12.8%	-21	-3.7%	27	5.2%
20% Primary Care/80% Non-Primary Care								
Primary Care	-25	-8.4%	-48	-14.7%	-40	-12.5%	-25	-8.4%
Non-Primary Care	-1	-0.2%	-80	-13.0%	-22	-3.9%	26	5.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-29	-9.8%	-52	-16.0%	-44	-13.8%	-29	-9.8%
Non-Primary Care	-10	-1.8%	-88	-14.3%	-30	-5.4%	17	3.4%
25% Primary Care/75% Non-Primary Care								
Primary Care	-28	-9.2%	-50	-15.5%	-42	-13.3%	-28	-9.2%
Non-Primary Care	-11	-2.1%	-90	-14.6%	-32	-5.7%	16	3.1%
20% Primary Care/80% Non-Primary Care								
Primary Care	-27	-8.9%	-49	-15.2%	-41	-13.0%	-27	-8.9%
Non-Primary Care	-12	-2.3%	-91	-14.8%	-33	-5.9%	15	2.9%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 15 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-28	-9.3%	-50	-15.6%	-42	-13.4%	-28	-9.3%
General/Family Medicine	-17	-13.0%	-27	-19.0%	-22	-15.9%	-17	-13.0%
General Internal Medicine	-13	-11.6%	-22	-17.7%	-21	-16.7%	-13	-11.6%
General Pediatrics	3	4.9%	-1	-2.3%	0	0.1%	3	4.9%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-26	-8.8%	-49	-15.0%	-41	-12.9%	-26	-8.8%
General/Family Medicine	-17	-12.5%	-26	-18.5%	-21	-15.4%	-17	-12.5%
General Internal Medicine	-13	-11.1%	-21	-17.2%	-20	-16.2%	-13	-11.1%
General Pediatrics	3	5.5%	-1	-1.7%	0	0.7%	3	5.5%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-25	-8.4%	-48	-14.7%	-40	-12.5%	-25	-8.4%
General/Family Medicine	-16	-12.2%	-26	-18.2%	-21	-15.1%	-16	-12.2%
General Internal Medicine	-12	-10.8%	-21	-16.9%	-20	-15.9%	-12	-10.8%
General Pediatrics	3	5.9%	-1	-1.4%	1	1.1%	3	5.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-29	-9.8%	-52	-16.0%	-44	-13.8%	-29	-9.8%
General/Family Medicine	-17	-12.7%	-26	-18.7%	-21	-15.5%	-17	-12.7%
General Internal Medicine	-18	-15.4%	-26	-21.2%	-25	-20.3%	-18	-15.4%
General Pediatrics	5	9.7%	1	2.2%	3	4.7%	5	9.7%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-28	-9.2%	-50	-15.5%	-42	-13.3%	-28	-9.2%
General/Family Medicine	-16	-12.1%	-26	-18.2%	-20	-15.0%	-16	-12.1%
General Internal Medicine	-17	-14.9%	-26	-20.8%	-24	-19.8%	-17	-14.9%
General Pediatrics	5	10.4%	2	2.8%	3	5.3%	5	10.4%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-27	-8.9%	-49	-15.2%	-41	-13.0%	-27	-8.9%
General/Family Medicine	-16	-11.8%	-25	-17.9%	-20	-14.7%	-16	-11.8%
General Internal Medicine	-17	-14.6%	-25	-20.5%	-24	-19.5%	-17	-14.6%
General Pediatrics	6	10.8%	2	3.2%	3	5.7%	6	10.8%

Non-Primary Care Specialties

Figure 16 – Projected Difference Between Physician Supply and Demand in North Country in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	0	2.3%	-1	-12.4%	0	-1.9%	1	7.6%
Other Internal Medicine Subspecialties	12	21.2%	3	3.8%	9	14.6%	15	27.5%
Obstetrics and Gynecology	1	2.6%	-2	-4.5%	-1	-2.2%	4	8.0%
Pathology	-5	-31.7%	-7	-41.5%	-6	-35.6%	-4	-28.1%
25% Primary Care/75% Non-Primary Care								
Cardiology	0	1.9%	-1	-12.7%	0	-2.2%	1	7.3%
Other Internal Medicine Subspecialties	12	20.8%	2	3.4%	9	14.2%	15	27.1%
Obstetrics and Gynecology	1	2.2%	-3	-4.8%	-1	-2.5%	4	7.6%
Pathology	-5	-31.9%	-7	-41.7%	-6	-35.8%	-4	-28.4%
20% Primary Care/80% Non-Primary Care								
Cardiology	0	1.8%	-2	-12.9%	0	-2.4%	1	7.1%
Other Internal Medicine Subspecialties	12	20.6%	2	3.2%	9	14.0%	15	26.9%
Obstetrics and Gynecology	1	2.0%	-3	-5.0%	-1	-2.6%	4	7.4%
Pathology	-5	-32.1%	-7	-41.8%	-6	-36.0%	-4	-28.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	0	0.5%	-2	-13.9%	0	-3.6%	1	5.8%
Other Internal Medicine Subspecialties	10	16.6%	0	-0.1%	6	10.3%	13	22.8%
Obstetrics and Gynecology	1	1.7%	-3	-5.3%	-2	-3.0%	3	7.0%
Pathology	-5	-35.7%	-8	-45.0%	-6	-39.4%	-5	-32.4%
25% Primary Care/75% Non-Primary Care								
Cardiology	0	0.2%	-2	-14.2%	0	-3.9%	1	5.5%
Other Internal Medicine Subspecialties	10	16.3%	0	-0.4%	6	9.9%	13	22.4%
Obstetrics and Gynecology	1	1.3%	-3	-5.6%	-2	-3.3%	3	6.7%
Pathology	-5	-35.9%	-8	-45.1%	-6	-39.6%	-5	-32.6%
20% Primary Care/80% Non-Primary Care								
Cardiology	0	0.0%	-2	-14.3%	0	-4.1%	1	5.3%
Other Internal Medicine Subspecialties	9	16.0%	0	-0.6%	6	9.7%	12	22.1%
Obstetrics and Gynecology	1	1.2%	-3	-5.8%	-2	-3.5%	3	6.5%
Pathology	-5	-36.1%	-8	-45.2%	-6	-39.7%	-5	-32.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-12	-21.8%	-20	-33.0%	-14	-25.4%	-9	-17.7%
Anesthesiology	-2	-6.3%	-9	-19.8%	-4	-11.2%	0	-1.4%
Radiology	0	0.5%	-8	-14.0%	-3	-5.3%	3	5.8%
Emergency Medicine	30	42.6%	25	32.8%	34	49.8%	34	50.2%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-12	-22.0%	-21	-33.2%	-14	-25.6%	-9	-17.9%
Anesthesiology	-3	-6.6%	-9	-20.0%	-5	-11.4%	-1	-1.7%
Radiology	0	0.2%	-9	-14.2%	-3	-5.5%	3	5.4%
Emergency Medicine	30	42.2%	25	32.4%	33	49.4%	34	49.7%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-12	-22.2%	-21	-33.4%	-14	-25.8%	-9	-18.1%
Anesthesiology	-3	-6.8%	-9	-20.2%	-5	-11.6%	-1	-1.9%
Radiology	0	0.0%	-9	-14.4%	-3	-5.7%	3	5.2%
Emergency Medicine	30	41.9%	25	32.2%	33	49.1%	33	49.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-13	-24.4%	-22	-35.2%	-15	-27.9%	-10	-20.4%
Anesthesiology	-3	-9.1%	-10	-22.1%	-6	-13.8%	-2	-4.3%
Radiology	-1	-2.0%	-10	-16.1%	-4	-7.6%	2	3.1%
Emergency Medicine	32	44.5%	26	34.5%	35	51.7%	35	52.1%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-13	-24.6%	-22	-35.4%	-16	-28.1%	-10	-20.6%
Anesthesiology	-4	-9.4%	-10	-22.4%	-6	-14.1%	-2	-4.6%
Radiology	-1	-2.3%	-10	-16.4%	-4	-7.9%	1	2.8%
Emergency Medicine	31	44.0%	26	34.1%	35	51.3%	35	51.6%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-13	-24.8%	-22	-35.6%	-16	-28.2%	-10	-20.8%
Anesthesiology	-4	-9.5%	-10	-22.5%	-6	-14.2%	-2	-4.8%
Radiology	-1	-2.5%	-10	-16.5%	-4	-8.1%	1	2.6%
Emergency Medicine	31	43.8%	26	33.9%	34	51.0%	35	51.3%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	0	1.0%	-5	-13.5%	-2	-4.2%	2	6.3%
Ophthalmology	-8	-34.1%	-12	-43.5%	-9	-35.4%	-7	-30.6%
Otolaryngology	-2	-15.3%	-4	-27.5%	-3	-18.7%	-1	-10.9%
Orthopedic Surgery	-2	-6.2%	-7	-19.6%	-4	-11.8%	0	-1.2%
25% Primary Care/75% Non-Primary Care								
General Surgery	0	0.7%	-5	-13.8%	-2	-4.5%	2	6.0%
Ophthalmology	-8	-34.3%	-12	-43.7%	-9	-35.6%	-7	-30.8%
Otolaryngology	-2	-15.6%	-4	-27.7%	-3	-18.9%	-1	-11.2%
Orthopedic Surgery	-2	-6.5%	-7	-19.9%	-4	-12.1%	0	-1.5%
20% Primary Care/80% Non-Primary Care								
General Surgery	0	0.5%	-6	-14.0%	-2	-4.7%	2	5.8%
Ophthalmology	-8	-34.4%	-12	-43.8%	-9	-35.7%	-7	-30.9%
Otolaryngology	-2	-15.8%	-4	-27.9%	-3	-19.1%	-1	-11.3%
Orthopedic Surgery	-2	-6.6%	-7	-20.0%	-4	-12.2%	-1	-1.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-1	-2.5%	-7	-16.5%	-3	-7.5%	1	2.6%
Ophthalmology	-9	-35.7%	-13	-44.9%	-9	-37.0%	-7	-32.3%
Otolaryngology	-2	-17.5%	-4	-29.3%	-3	-20.7%	-2	-13.1%
Orthopedic Surgery	-2	-7.4%	-8	-20.7%	-4	-13.0%	-1	-2.6%
25% Primary Care/75% Non-Primary Care								
General Surgery	-1	-2.8%	-7	-16.8%	-3	-7.8%	1	2.3%
Ophthalmology	-9	-35.9%	-13	-45.1%	-9	-37.2%	-7	-32.5%
Otolaryngology	-2	-17.7%	-4	-29.6%	-3	-21.0%	-2	-13.4%
Orthopedic Surgery	-2	-7.7%	-8	-21.0%	-4	-13.3%	-1	-2.9%
20% Primary Care/80% Non-Primary Care								
General Surgery	-1	-3.0%	-7	-16.9%	-3	-8.0%	1	2.1%
Ophthalmology	-9	-36.0%	-13	-45.2%	-9	-37.3%	-7	-32.6%
Otolaryngology	-2	-17.9%	-5	-29.7%	-3	-21.1%	-2	-13.6%
Orthopedic Surgery	-2	-7.9%	-8	-21.1%	-4	-13.4%	-1	-3.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-4	-32.9%	-6	-42.6%	-5	-36.4%	-4	-29.4%
Other Surgical Subspecialties	-2	-25.8%	-3	-36.5%	-2	-29.4%	-2	-21.9%
Other Specialties	-6	-9.3%	-17	-22.4%	-9	-13.5%	-3	-4.6%
25% Primary Care/75% Non-Primary Care								
Urology	-4	-33.1%	-6	-42.7%	-5	-36.6%	-4	-29.6%
Other Surgical Subspecialties	-2	-26.1%	-3	-36.7%	-2	-29.6%	-2	-22.2%
Other Specialties	-6	-9.6%	-18	-22.6%	-10	-13.8%	-3	-4.9%
20% Primary Care/80% Non-Primary Care								
Urology	-4	-33.2%	-7	-42.8%	-5	-36.8%	-4	-29.7%
Other Surgical Subspecialties	-2	-26.2%	-3	-36.8%	-2	-29.7%	-2	-22.3%
Other Specialties	-7	-9.8%	-18	-22.7%	-10	-13.9%	-3	-5.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-5	-35.3%	-7	-44.5%	-5	-38.7%	-4	-31.8%
Other Surgical Subspecialties	-2	-28.4%	-4	-38.6%	-3	-31.8%	-2	-24.6%
Other Specialties	-8	-12.2%	-19	-24.8%	-11	-16.2%	-5	-7.6%
25% Primary Care/75% Non-Primary Care								
Urology	-5	-35.5%	-7	-44.7%	-5	-38.8%	-4	-32.1%
Other Surgical Subspecialties	-2	-28.6%	-4	-38.8%	-3	-32.0%	-2	-24.8%
Other Specialties	-8	-12.5%	-20	-25.0%	-12	-16.5%	-5	-7.9%
20% Primary Care/80% Non-Primary Care								
Urology	-5	-35.6%	-7	-44.8%	-5	-39.0%	-4	-32.2%
Other Surgical Subspecialties	-2	-28.7%	-4	-39.0%	-3	-32.1%	-2	-25.0%
Other Specialties	-8	-12.6%	-20	-25.2%	-12	-16.6%	-5	-8.0%

Relationship between Physician Supply and Demand in Southern Tier 2030

Southern Tier Supply Scenario 1: Baseline

Figure 1 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>All Physicians</i>	88	4.6%	-149	-7.0%	0	0.0%	148	8.0%
Supply responsive to demand								
<i>All Physicians</i>	-87	-4.6%	-325	-15.1%	-175	-8.8%	-27	-1.5%

Figure 2 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care</i>	-2	-0.2%	-54	-7.1%	-36	-4.9%	-2	-0.2%
<i>Non-Primary Care</i>	90	7.5%	-95	-6.9%	36	2.9%	150	13.1%
Supply responsive to demand								
<i>Primary Care</i>	-64	-9.1%	-116	-15.3%	-99	-13.3%	-64	-9.1%
<i>Non-Primary Care</i>	-23	-1.9%	-208	-15.0%	-76	-6.1%	37	3.2%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 3 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Primary Care (Overall)	-2	-0.2%	-54	-7.1%	-36	-4.9%	-2	-0.2%
General/Family Medicine	-8	-3.0%	-29	-9.6%	-18	-6.1%	-8	-3.0%
General Internal Medicine	-9	-2.7%	-34	-9.4%	-30	-8.3%	-9	-2.7%
General Pediatrics	16	18.1%	9	10.0%	12	12.7%	16	18.1%
Supply responsive to demand								
Primary Care (Overall)	-64	-9.1%	-116	-15.3%	-99	-13.3%	-64	-9.1%
General/Family Medicine	-29	-10.5%	-50	-16.7%	-39	-13.5%	-29	-10.5%
General Internal Medicine	-46	-13.4%	-71	-19.3%	-67	-18.4%	-46	-13.4%
General Pediatrics	11	12.4%	4	4.6%	7	7.2%	11	12.4%

Non-Primary Care Specialties

Figure 4 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Cardiology	9	14.1%	-2	-2.3%	6	9.4%	12	20.1%
Other Internal Medicine Subspecialties	52	32.2%	25	13.2%	43	25.0%	61	39.1%
Obstetrics and Gynecology	10	11.3%	3	3.6%	5	6.2%	14	17.1%
Pathology	-9	-27.3%	-15	-37.8%	-11	-31.5%	-7	-23.5%
Supply responsive to demand								
Cardiology	2	3.1%	-9	-11.7%	-1	-1.2%	5	8.5%
Other Internal Medicine Subspecialties	32	19.5%	4	2.4%	22	13.0%	40	25.8%
Obstetrics and Gynecology	4	4.2%	-3	-3.0%	-1	-0.6%	8	9.7%
Pathology	-11	-34.1%	-17	-43.6%	-13	-37.9%	-10	-30.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Psychiatry	-14	-13.4%	-31	-25.8%	-19	-17.4%	-9	-8.8%
Anesthesiology	2	1.8%	-15	-12.8%	-4	-3.5%	7	7.2%
Radiology	12	9.6%	-9	-6.1%	5	3.4%	19	15.4%
Emergency Medicine	52	59.0%	45	48.1%	56	67.0%	56	67.4%
Supply responsive to demand								
Psychiatry	-23	-22.5%	-40	-33.6%	-28	-26.1%	-18	-18.4%
Anesthesiology	-7	-6.8%	-24	-20.2%	-12	-11.6%	-2	-1.9%
Radiology	1	0.4%	-21	-14.0%	-7	-5.3%	7	5.7%
Emergency Medicine	42	48.1%	36	37.9%	47	55.5%	47	55.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
General Surgery	8	10.2%	-5	-5.6%	4	4.5%	13	16.0%
Ophthalmology	-14	-26.9%	-22	-37.4%	-15	-28.4%	-11	-23.0%
Otolaryngology	-2	-10.7%	-5	-23.5%	-3	-14.2%	-1	-6.0%
Orthopedic Surgery	2	4.3%	-7	-10.7%	-1	-2.0%	5	9.7%
Supply responsive to demand								
General Surgery	0	-0.1%	-14	-14.4%	-5	-5.2%	4	5.2%
Ophthalmology	-17	-34.1%	-26	-43.5%	-18	-35.4%	-15	-30.6%
Otolaryngology	-3	-15.4%	-6	-27.6%	-4	-18.8%	-2	-11.0%
Orthopedic Surgery	-3	-5.1%	-12	-18.8%	-6	-10.8%	0	-0.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Urology	-8	-26.6%	-13	-37.2%	-10	-30.5%	-7	-22.8%
Other Surgical Subspecialties	-9	-18.3%	-18	-30.1%	-12	-22.2%	-7	-14.1%
Other Supecialties	-2	-1.1%	-27	-15.3%	-9	-5.7%	6	4.1%
Supply responsive to demand								
Urology	-10	-33.6%	-16	-43.2%	-12	-37.1%	-9	-30.1%
Other Surgical Subspecialties	-13	-26.6%	-22	-37.1%	-16	-30.1%	-11	-22.7%
Other Specialties	-15	-10.0%	-40	-22.9%	-22	-14.1%	-7	-5.3%

Southern Tier Supply Scenario 2: NP/PA High and Lower Growth

Figure 5 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	324	17.0%	87	4.0%	236	11.8%	384	20.8%
NP/PA Lower Growth								
<i>All Physicians</i>	204	10.7%	-33	-1.5%	116	5.8%	264	14.3%
Supply responsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	121	6.4%	-116	-5.4%	33	1.7%	181	9.8%
NP/PA Lower Growth								
<i>All Physicians</i>	13	0.7%	-225	-10.5%	-75	-3.8%	73	3.9%

Figure 6 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care	131	18.5%	78	10.3%	96	12.9%	131	18.5%
Non-Primary Care	193	16.1%	8	0.6%	140	11.2%	253	22.2%
NP/PA Lower Growth								
Primary Care	69	9.7%	16	2.2%	34	4.6%	69	9.7%
Non-Primary Care	135	11.3%	-50	-3.6%	82	6.6%	195	17.1%
Supply responsive to demand								
NP/PA High Growth								
Primary Care	43	6.1%	-9	-1.2%	9	1.2%	43	6.1%
Non-Primary Care	78	6.5%	-107	-7.7%	25	2.0%	138	12.1%
NP/PA Lower Growth								
Primary Care	-12	-1.7%	-64	-8.5%	-47	-6.3%	-12	-1.7%
Non-Primary Care	25	2.1%	-160	-11.6%	-28	-2.3%	85	7.4%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 7 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care (Overall)	131	18.5%	78	10.3%	96	12.9%	131	18.5%
General/Family Medicine	42	15.2%	22	7.3%	33	11.5%	42	15.2%
General Internal Medicine	53	15.6%	28	7.6%	32	8.9%	53	15.6%
General Pediatrics	35	40.2%	29	30.6%	31	33.8%	35	40.2%
NP/PA Lower Growth								
Primary Care (Overall)	69	9.7%	16	2.2%	34	4.6%	69	9.7%
General/Family Medicine	19	6.7%	-2	-0.6%	9	3.2%	19	6.7%
General Internal Medicine	24	7.0%	-1	-0.3%	3	0.8%	24	7.0%
General Pediatrics	26	29.8%	20	20.9%	22	23.9%	26	29.8%
Supply responsive to demand								
NP/PA High Growth								
Primary Care (Overall)	43	6.1%	-9	-1.2%	9	1.2%	43	6.1%
General/Family Medicine	12	4.4%	-8	-2.8%	3	1.0%	12	4.4%
General Internal Medicine	4	1.1%	-21	-5.8%	-17	-4.7%	4	1.1%
General Pediatrics	27	31.2%	21	22.2%	23	25.2%	27	31.2%
NP/PA Lower Growth								
Primary Care (Overall)	-12	-1.7%	-64	-8.5%	-47	-6.3%	-12	-1.7%
General/Family Medicine	-9	-3.3%	-30	-9.9%	-19	-6.5%	-9	-3.3%
General Internal Medicine	-22	-6.4%	-47	-12.8%	-43	-11.8%	-22	-6.4%
General Pediatrics	19	21.5%	12	13.1%	15	15.9%	19	21.5%

Non-Primary Care Specialties

Figure 8 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Cardiology	14	23.2%	4	5.5%	12	18.2%	18	29.7%
Other Internal Medicine Subspecialties	70	42.8%	42	22.3%	60	35.0%	78	50.3%
Obstetrics and Gynecology	17	20.2%	11	11.9%	13	14.7%	21	26.5%
Pathology	-7	-21.5%	-13	-32.8%	-9	-26.0%	-5	-17.4%
NP/PA Lower Growth								
Cardiology	11	18.1%	1	1.2%	9	13.3%	14	24.3%
Other Internal Medicine Subspecialties	60	36.9%	33	17.2%	51	29.4%	68	44.1%
Obstetrics and Gynecology	13	15.2%	7	7.3%	9	9.9%	17	21.3%
Pathology	-8	-24.7%	-14	-35.6%	-10	-29.0%	-7	-20.8%
Supply responsive to demand								
NP/PA High Growth								
Cardiology	7	11.9%	-3	-4.2%	5	7.3%	10	17.8%
Other Internal Medicine Subspecialties	49	29.8%	21	11.1%	39	22.7%	57	36.6%
Obstetrics and Gynecology	11	13.1%	5	5.4%	7	7.9%	15	19.1%
Pathology	-9	-28.5%	-15	-38.8%	-11	-32.6%	-8	-24.7%
NP/PA Lower Growth								
Cardiology	4	7.3%	-6	-8.2%	2	2.8%	8	12.9%
Other Internal Medicine Subspecialties	40	24.4%	12	6.5%	30	17.7%	48	31.0%
Obstetrics and Gynecology	7	8.4%	1	1.0%	3	3.5%	11	14.1%
Pathology	-10	-31.5%	-16	-41.3%	-12	-35.4%	-9	-27.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Psychiatry	-7	-6.4%	-24	-19.9%	-12	-10.8%	-1	-1.5%
Anesthesiology	10	10.0%	-7	-5.8%	5	4.3%	15	15.8%
Radiology	23	18.4%	2	1.4%	16	11.7%	30	24.6%
Emergency Medicine	63	71.8%	57	60.0%	67	80.5%	68	80.8%
NP/PA Lower Growth								
Psychiatry	-11	-10.3%	-28	-23.2%	-16	-14.5%	-5	-5.6%
Anesthesiology	5	5.4%	-11	-9.7%	0	-0.1%	11	11.0%
Radiology	17	13.5%	-4	-2.8%	9	7.0%	23	19.5%
Emergency Medicine	57	64.7%	50	53.4%	61	73.0%	61	73.3%
Supply responsive to demand								
NP/PA High Growth								
Psychiatry	-16	-15.8%	-34	-27.9%	-21	-19.7%	-11	-11.4%
Anesthesiology	1	1.2%	-16	-13.4%	-4	-4.1%	6	6.5%
Radiology	11	9.0%	-10	-6.6%	4	2.8%	18	14.8%
Emergency Medicine	53	60.8%	47	49.7%	58	68.9%	58	69.2%
NP/PA Lower Growth								
Psychiatry	-20	-19.3%	-37	-30.9%	-25	-23.0%	-15	-15.1%
Anesthesiology	-3	-3.0%	-20	-16.9%	-9	-8.0%	2	2.1%
Radiology	6	4.5%	-16	-10.5%	-2	-1.4%	12	10.0%
Emergency Medicine	48	54.1%	41	43.5%	52	61.9%	52	62.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
General Surgery	16	19.0%	2	1.9%	11	12.9%	20	25.3%
Ophthalmology	-11	-21.0%	-19	-32.3%	-12	-22.6%	-8	-16.8%
Otolaryngology	-1	-3.6%	-4	-17.4%	-2	-7.4%	0	1.5%
Orthopedic Surgery	7	12.6%	-2	-3.6%	3	5.9%	10	18.6%
NP/PA Lower Growth								
General Surgery	12	14.1%	-2	-2.3%	7	8.3%	16	20.1%
Ophthalmology	-12	-24.3%	-21	-35.1%	-13	-25.8%	-10	-20.3%
Otolaryngology	-2	-7.6%	-5	-20.8%	-2	-11.2%	-1	-2.7%
Orthopedic Surgery	4	8.0%	-5	-7.6%	1	1.5%	7	13.6%
Supply responsive to demand								
NP/PA High Growth								
General Surgery	7	8.5%	-7	-7.1%	3	3.0%	11	14.2%
Ophthalmology	-14	-28.4%	-23	-38.7%	-16	-29.8%	-12	-24.6%
Otolaryngology	-2	-8.2%	-5	-21.4%	-2	-11.8%	-1	-3.3%
Orthopedic Surgery	2	3.0%	-7	-11.8%	-2	-3.2%	4	8.4%
NP/PA Lower Growth								
General Surgery	3	4.0%	-11	-10.9%	-1	-1.3%	7	9.5%
Ophthalmology	-16	-31.4%	-25	-41.2%	-17	-32.8%	-13	-27.8%
Otolaryngology	-2	-12.0%	-6	-24.6%	-3	-15.4%	-1	-7.3%
Orthopedic Surgery	-1	-1.3%	-10	-15.4%	-4	-7.2%	2	3.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Urology	-6	-20.7%	-12	-32.1%	-8	-24.9%	-5	-16.6%
Other Surgical Subspecialties	-6	-11.8%	-14	-24.5%	-8	-16.0%	-3	-7.2%
Other Specialties	10	6.8%	-15	-8.5%	3	1.9%	18	12.4%
NP/PA Lower Growth								
Urology	-7	-24.0%	-13	-34.9%	-9	-28.0%	-6	-20.0%
Other Surgical Subspecialties	-8	-15.5%	-16	-27.6%	-10	-19.5%	-5	-11.0%
Other Specialties	4	2.4%	-21	-12.3%	-4	-2.3%	11	7.8%
Supply responsive to demand								
NP/PA High Growth								
Urology	-9	-27.9%	-14	-38.3%	-10	-31.7%	-7	-24.1%
Other Surgical Subspecialties	-10	-20.3%	-19	-31.7%	-13	-24.1%	-8	-16.1%
Other Specialties	-3	-2.3%	-28	-16.3%	-11	-6.8%	4	2.9%
NP/PA Lower Growth								
Urology	-10	-30.9%	-15	-40.8%	-11	-34.6%	-8	-27.3%
Other Surgical Subspecialties	-12	-23.6%	-20	-34.6%	-14	-27.2%	-9	-19.6%
Other Specialties	-9	-6.3%	-34	-19.8%	-17	-10.6%	-2	-1.4%

Southern Tier Supply Scenario 3a: Increased Retention of Physicians

Figure 9 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	136	7.2%	-101	-4.7%	49	2.4%	196	10.6%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	136	7.2%	-101	-4.7%	49	2.4%	196	10.6%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	136	7.2%	-101	-4.7%	49	2.4%	196	10.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-43	-2.3%	-281	-13.1%	-131	-6.6%	17	0.9%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-43	-2.3%	-281	-13.1%	-131	-6.6%	17	0.9%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-43	-2.3%	-281	-13.1%	-131	-6.6%	17	0.9%

Figure 10 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	14	2.0%	-38	-5.0%	-20	-2.7%	14	2.0%
Non-Primary Care	122	10.2%	-63	-4.5%	69	5.5%	182	16.0%
25% Primary Care/75% Non-Primary Care								
Primary Care	10	1.5%	-42	-5.5%	-24	-3.3%	10	1.5%
Non-Primary Care	126	10.5%	-59	-4.3%	73	5.8%	186	16.3%
20% Primary Care/80% Non-Primary Care								
Primary Care	8	1.1%	-44	-5.8%	-27	-3.6%	8	1.1%
Non-Primary Care	128	10.7%	-57	-4.1%	75	6.0%	188	16.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-50	-7.0%	-102	-13.4%	-84	-11.4%	-50	-7.0%
Non-Primary Care	6	0.5%	-179	-12.9%	-47	-3.8%	66	5.8%
25% Primary Care/75% Non-Primary Care								
Primary Care	-53	-7.5%	-105	-13.9%	-88	-11.9%	-53	-7.5%
Non-Primary Care	10	0.8%	-175	-12.6%	-43	-3.5%	70	6.1%
20% Primary Care/80% Non-Primary Care								
Primary Care	-56	-7.9%	-108	-14.2%	-90	-12.1%	-56	-7.9%
Non-Primary Care	12	1.0%	-173	-12.5%	-41	-3.3%	72	6.3%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 11 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	14	2.0%	-38	-5.0%	-20	-2.7%	14	2.0%
General/Family Medicine	-2	-0.7%	-22	-7.6%	-11	-4.0%	-2	-0.7%
General Internal Medicine	-2	-0.5%	-27	-7.3%	-23	-6.2%	-2	-0.5%
General Pediatrics	18	20.8%	12	12.5%	14	15.2%	18	20.8%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	10	1.5%	-42	-5.5%	-24	-3.3%	10	1.5%
General/Family Medicine	-4	-1.3%	-24	-8.1%	-13	-4.5%	-4	-1.3%
General Internal Medicine	-3	-1.0%	-29	-7.8%	-24	-6.7%	-3	-1.0%
General Pediatrics	17	20.1%	11	11.8%	13	14.6%	17	20.1%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	8	1.1%	-44	-5.8%	-27	-3.6%	8	1.1%
General/Family Medicine	-5	-1.6%	-25	-8.4%	-14	-4.9%	-5	-1.6%
General Internal Medicine	-5	-1.3%	-30	-8.1%	-26	-7.0%	-5	-1.3%
General Pediatrics	17	19.7%	11	11.5%	13	14.2%	17	19.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-50	-7.0%	-102	-13.4%	-84	-11.4%	-50	-7.0%
General/Family Medicine	-24	-8.5%	-44	-14.8%	-33	-11.5%	-24	-8.5%
General Internal Medicine	-39	-11.4%	-64	-17.5%	-60	-16.5%	-39	-11.4%
General Pediatrics	13	14.9%	7	7.0%	9	9.7%	13	14.9%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-53	-7.5%	-105	-13.9%	-88	-11.9%	-53	-7.5%
General/Family Medicine	-25	-9.0%	-45	-15.3%	-34	-12.0%	-25	-9.0%
General Internal Medicine	-41	-11.9%	-66	-17.9%	-62	-17.0%	-41	-11.9%
General Pediatrics	12	14.3%	6	6.4%	8	9.1%	12	14.3%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-56	-7.9%	-108	-14.2%	-90	-12.1%	-56	-7.9%
General/Family Medicine	-26	-9.3%	-46	-15.6%	-35	-12.3%	-26	-9.3%
General Internal Medicine	-42	-12.2%	-67	-18.2%	-63	-17.3%	-42	-12.2%
General Pediatrics	12	13.9%	6	6.1%	8	8.7%	12	13.9%

Non-Primary Care Specialties

Figure 12 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	11	16.9%	0	0.1%	8	12.1%	14	23.1%
Other Internal Medicine Subspecialties	58	35.5%	30	16.0%	48	28.1%	66	42.6%
Obstetrics and Gynecology	12	14.1%	6	6.2%	8	8.8%	16	20.1%
Pathology	-8	-25.5%	-14	-36.2%	-10	-29.8%	-7	-21.6%
25% Primary Care/75% Non-Primary Care								
Cardiology	11	17.3%	0	0.4%	8	12.5%	14	23.5%
Other Internal Medicine Subspecialties	58	35.9%	31	16.4%	49	28.5%	67	43.0%
Obstetrics and Gynecology	12	14.4%	6	6.5%	8	9.1%	16	20.4%
Pathology	-8	-25.3%	-14	-36.0%	-10	-29.5%	-7	-21.3%
20% Primary Care/80% Non-Primary Care								
Cardiology	11	17.5%	0	0.6%	8	12.7%	14	23.7%
Other Internal Medicine Subspecialties	59	36.1%	32	16.6%	50	28.7%	67	43.3%
Obstetrics and Gynecology	12	14.6%	6	6.7%	8	9.3%	17	20.6%
Pathology	-8	-25.1%	-14	-35.9%	-10	-29.4%	-7	-21.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	3	5.6%	-7	-9.6%	1	1.3%	7	11.2%
Other Internal Medicine Subspecialties	37	22.5%	9	4.9%	27	15.9%	45	29.0%
Obstetrics and Gynecology	6	6.8%	-1	-0.5%	2	1.9%	10	12.4%
Pathology	-11	-32.5%	-16	-42.2%	-13	-36.4%	-9	-29.0%
25% Primary Care/75% Non-Primary Care								
Cardiology	4	5.9%	-7	-9.3%	1	1.6%	7	11.5%
Other Internal Medicine Subspecialties	37	22.9%	10	5.2%	28	16.2%	45	29.3%
Obstetrics and Gynecology	6	7.1%	0	-0.2%	2	2.2%	10	12.7%
Pathology	-11	-32.3%	-16	-42.0%	-13	-36.2%	-9	-28.7%
20% Primary Care/80% Non-Primary Care								
Cardiology	4	6.1%	-7	-9.1%	1	1.8%	7	11.7%
Other Internal Medicine Subspecialties	38	23.1%	10	5.4%	28	16.4%	46	29.6%
Obstetrics and Gynecology	6	7.3%	0	-0.1%	2	2.4%	10	12.9%
Pathology	-11	-32.2%	-16	-41.9%	-13	-36.1%	-9	-28.6%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-12	-11.2%	-29	-24.0%	-17	-15.3%	-6	-6.6%
Anesthesiology	4	4.4%	-13	-10.6%	-1	-1.1%	9	9.8%
Radiology	16	12.3%	-6	-3.8%	8	5.9%	22	18.2%
Emergency Medicine	55	63.0%	49	51.8%	60	71.2%	60	71.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-11	-11.0%	-29	-23.7%	-16	-15.1%	-6	-6.3%
Anesthesiology	5	4.7%	-12	-10.4%	-1	-0.8%	10	10.2%
Radiology	16	12.7%	-5	-3.5%	8	6.3%	22	18.6%
Emergency Medicine	56	63.5%	49	52.3%	60	71.7%	60	72.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-11	-10.8%	-28	-23.6%	-16	-14.9%	-6	-6.1%
Anesthesiology	5	4.9%	-12	-10.2%	-1	-0.6%	10	10.4%
Radiology	16	12.9%	-5	-3.3%	9	6.5%	23	18.8%
Emergency Medicine	56	63.8%	50	52.6%	60	72.1%	61	72.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-21	-20.6%	-38	-32.0%	-26	-24.2%	-16	-16.4%
Anesthesiology	-5	-4.5%	-21	-18.2%	-10	-9.4%	1	0.5%
Radiology	4	2.9%	-18	-11.9%	-4	-2.9%	10	8.3%
Emergency Medicine	46	51.8%	39	41.3%	50	59.4%	50	59.7%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-21	-20.3%	-38	-31.8%	-26	-24.0%	-16	-16.1%
Anesthesiology	-4	-4.2%	-21	-18.0%	-10	-9.2%	1	0.8%
Radiology	4	3.2%	-17	-11.6%	-4	-2.6%	10	8.7%
Emergency Medicine	46	52.2%	39	41.8%	50	59.9%	50	60.2%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-21	-20.2%	-38	-31.6%	-26	-23.8%	-16	-16.0%
Anesthesiology	-4	-4.0%	-21	-17.8%	-10	-9.0%	1	1.0%
Radiology	4	3.4%	-17	-11.4%	-3	-2.5%	11	8.9%
Emergency Medicine	46	52.5%	40	42.0%	50	60.2%	51	60.5%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	11	13.0%	-3	-3.3%	6	7.2%	15	18.9%
Ophthalmology	-13	-25.0%	-21	-35.8%	-14	-26.6%	-10	-21.1%
Otolaryngology	-2	-8.5%	-5	-21.6%	-3	-12.1%	-1	-3.7%
Orthopedic Surgery	4	6.9%	-5	-8.5%	0	0.5%	6	12.5%
25% Primary Care/75% Non-Primary Care								
General Surgery	11	13.3%	-3	-3.0%	7	7.5%	15	19.3%
Ophthalmology	-13	-24.8%	-21	-35.6%	-14	-26.3%	-10	-20.9%
Otolaryngology	-2	-8.2%	-5	-21.4%	-2	-11.8%	-1	-3.4%
Orthopedic Surgery	4	7.2%	-5	-8.2%	0	0.8%	7	12.8%
20% Primary Care/80% Non-Primary Care								
General Surgery	11	13.5%	-3	-2.8%	7	7.7%	15	19.5%
Ophthalmology	-13	-24.7%	-21	-35.5%	-14	-26.2%	-10	-20.7%
Otolaryngology	-2	-8.0%	-5	-21.3%	-2	-11.7%	-1	-3.2%
Orthopedic Surgery	4	7.4%	-5	-8.0%	1	1.0%	7	13.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	2	2.4%	-12	-12.3%	-2	-2.8%	6	7.8%
Ophthalmology	-17	-32.4%	-25	-42.1%	-18	-33.8%	-14	-28.9%
Otolaryngology	-3	-13.3%	-6	-25.8%	-3	-16.7%	-2	-8.8%
Orthopedic Surgery	-1	-2.8%	-11	-16.7%	-5	-8.6%	1	2.3%
25% Primary Care/75% Non-Primary Care								
General Surgery	2	2.7%	-12	-12.0%	-2	-2.5%	6	8.1%
Ophthalmology	-16	-32.2%	-25	-41.9%	-17	-33.6%	-14	-28.6%
Otolaryngology	-3	-13.1%	-6	-25.5%	-3	-16.5%	-2	-8.5%
Orthopedic Surgery	-1	-2.5%	-10	-16.5%	-5	-8.3%	1	2.7%
20% Primary Care/80% Non-Primary Care								
General Surgery	2	2.9%	-11	-11.9%	-2	-2.4%	7	8.3%
Ophthalmology	-16	-32.1%	-25	-41.8%	-17	-33.5%	-14	-28.5%
Otolaryngology	-3	-12.9%	-6	-25.4%	-3	-16.3%	-2	-8.3%
Orthopedic Surgery	-1	-2.3%	-10	-16.3%	-5	-8.2%	1	2.8%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-8	-24.8%	-13	-35.6%	-9	-28.7%	-6	-20.8%
Other Surgical Subspecialties	-8	-16.3%	-17	-28.3%	-11	-20.3%	-6	-11.9%
Other Specialties	2	1.4%	-23	-13.2%	-5	-3.3%	9	6.7%
25% Primary Care/75% Non-Primary Care								
Urology	-8	-24.6%	-13	-35.4%	-9	-28.5%	-6	-20.6%
Other Surgical Subspecialties	-8	-16.1%	-16	-28.1%	-11	-20.1%	-6	-11.6%
Other Specialties	2	1.7%	-23	-12.9%	-5	-3.0%	10	7.0%
20% Primary Care/80% Non-Primary Care								
Urology	-8	-24.4%	-13	-35.3%	-9	-28.4%	-6	-20.4%
Other Surgical Subspecialties	-8	-15.9%	-16	-28.0%	-10	-19.9%	-5	-11.5%
Other Specialties	3	1.8%	-22	-12.8%	-4	-2.8%	10	7.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-10	-32.0%	-15	-41.8%	-12	-35.6%	-8	-28.4%
Other Surgical Subspecialties	-12	-24.7%	-21	-35.6%	-15	-28.3%	-10	-20.8%
Other Specialties	-12	-7.8%	-37	-21.0%	-19	-12.0%	-4	-2.9%
25% Primary Care/75% Non-Primary Care								
Urology	-10	-31.8%	-15	-41.6%	-12	-35.4%	-8	-28.2%
Other Surgical Subspecialties	-12	-24.5%	-21	-35.4%	-15	-28.1%	-10	-20.5%
Other Specialties	-11	-7.5%	-36	-20.8%	-18	-11.7%	-4	-2.6%
20% Primary Care/80% Non-Primary Care								
Urology	-10	-31.7%	-15	-41.5%	-12	-35.2%	-8	-28.1%
Other Surgical Subspecialties	-12	-24.4%	-21	-35.2%	-15	-28.0%	-10	-20.4%
Other Specialties	-11	-7.3%	-36	-20.6%	-18	-11.6%	-3	-2.4%

Southern Tier Supply Scenario 3b: Decreased Retention of Physicians

Figure 13 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	40	2.1%	-197	-9.2%	-48	-2.4%	100	5.4%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	40	2.1%	-197	-9.2%	-48	-2.4%	100	5.4%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	40	2.1%	-197	-9.2%	-48	-2.4%	100	5.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-131	-6.9%	-368	-17.2%	-219	-11.0%	-71	-3.9%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-131	-6.9%	-368	-17.2%	-219	-11.0%	-71	-3.9%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-131	-6.9%	-368	-17.2%	-219	-11.0%	-71	-3.9%

Figure 14 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-18	-2.5%	-70	-9.2%	-52	-7.1%	-18	-2.5%
Non-Primary Care	57	4.8%	-128	-9.2%	4	0.3%	117	10.3%
25% Primary Care/75% Non-Primary Care								
Primary Care	-14	-1.9%	-66	-8.7%	-48	-6.5%	-14	-1.9%
Non-Primary Care	53	4.5%	-132	-9.5%	0	0.0%	113	10.0%
20% Primary Care/80% Non-Primary Care								
Primary Care	-11	-1.6%	-63	-8.4%	-46	-6.2%	-11	-1.6%
Non-Primary Care	51	4.3%	-134	-9.7%	-2	-0.2%	111	9.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-79	-11.2%	-131	-17.3%	-113	-15.3%	-79	-11.2%
Non-Primary Care	-52	-4.4%	-237	-17.1%	-106	-8.4%	8	0.7%
25% Primary Care/75% Non-Primary Care								
Primary Care	-75	-10.6%	-127	-16.8%	-110	-14.8%	-75	-10.6%
Non-Primary Care	-56	-4.7%	-241	-17.4%	-109	-8.7%	4	0.4%
20% Primary Care/80% Non-Primary Care								
Primary Care	-73	-10.3%	-125	-16.5%	-108	-14.5%	-73	-10.3%
Non-Primary Care	-58	-4.8%	-243	-17.6%	-111	-8.9%	2	0.2%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 15 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-18	-2.5%	-70	-9.2%	-52	-7.1%	-18	-2.5%
General/Family Medicine	-14	-5.2%	-35	-11.7%	-24	-8.3%	-14	-5.2%
General Internal Medicine	-17	-4.9%	-42	-11.4%	-38	-10.4%	-17	-4.9%
General Pediatrics	13	15.4%	7	7.4%	9	10.1%	13	15.4%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-14	-1.9%	-66	-8.7%	-48	-6.5%	-14	-1.9%
General/Family Medicine	-13	-4.6%	-33	-11.2%	-22	-7.7%	-13	-4.6%
General Internal Medicine	-15	-4.3%	-40	-10.9%	-36	-9.9%	-15	-4.3%
General Pediatrics	14	16.0%	8	8.1%	10	10.7%	14	16.0%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-11	-1.6%	-63	-8.4%	-46	-6.2%	-11	-1.6%
General/Family Medicine	-12	-4.3%	-32	-10.9%	-21	-7.4%	-12	-4.3%
General Internal Medicine	-14	-4.0%	-39	-10.6%	-35	-9.6%	-14	-4.0%
General Pediatrics	14	16.4%	8	8.4%	10	11.1%	14	16.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-79	-11.2%	-131	-17.3%	-113	-15.3%	-79	-11.2%
General/Family Medicine	-35	-12.6%	-55	-18.6%	-44	-15.4%	-35	-12.6%
General Internal Medicine	-53	-15.3%	-78	-21.2%	-74	-20.2%	-53	-15.3%
General Pediatrics	9	9.8%	2	2.3%	4	4.8%	9	9.8%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-75	-10.6%	-127	-16.8%	-110	-14.8%	-75	-10.6%
General/Family Medicine	-33	-12.1%	-54	-18.1%	-43	-15.0%	-33	-12.1%
General Internal Medicine	-51	-14.8%	-76	-20.7%	-72	-19.8%	-51	-14.8%
General Pediatrics	9	10.4%	3	2.9%	5	5.4%	9	10.4%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-73	-10.3%	-125	-16.5%	-108	-14.5%	-73	-10.3%
General/Family Medicine	-33	-11.8%	-53	-17.8%	-42	-14.7%	-33	-11.8%
General Internal Medicine	-50	-14.6%	-75	-20.4%	-71	-19.5%	-50	-14.6%
General Pediatrics	9	10.8%	3	3.2%	5	5.8%	9	10.8%

Non-Primary Care Specialties

Figure 16 – Projected Difference Between Physician Supply and Demand in Southern Tier in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	7	11.2%	-3	-4.7%	4	6.7%	10	17.1%
Other Internal Medicine Subspecialties	47	28.9%	20	10.4%	38	21.9%	55	35.6%
Obstetrics and Gynecology	7	8.5%	1	1.0%	3	3.5%	11	14.2%
Pathology	-10	-29.1%	-15	-39.3%	-12	-33.2%	-8	-25.4%
25% Primary Care/75% Non-Primary Care								
Cardiology	7	10.9%	-4	-5.0%	4	6.3%	10	16.7%
Other Internal Medicine Subspecialties	46	28.5%	19	10.0%	37	21.5%	55	35.2%
Obstetrics and Gynecology	7	8.1%	1	0.7%	3	3.2%	11	13.8%
Pathology	-10	-29.4%	-15	-39.5%	-12	-33.4%	-8	-25.6%
20% Primary Care/80% Non-Primary Care								
Cardiology	7	10.7%	-4	-5.2%	4	6.1%	10	16.5%
Other Internal Medicine Subspecialties	46	28.2%	19	9.8%	37	21.2%	54	35.0%
Obstetrics and Gynecology	7	7.9%	0	0.5%	3	3.0%	11	13.6%
Pathology	-10	-29.5%	-15	-39.6%	-12	-33.5%	-8	-25.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	0	0.5%	-10	-13.9%	-2	-3.6%	3	5.8%
Other Internal Medicine Subspecialties	27	16.6%	0	-0.2%	18	10.2%	35	22.7%
Obstetrics and Gynecology	1	1.6%	-5	-5.4%	-3	-3.1%	6	7.0%
Pathology	-12	-35.8%	-17	-45.0%	-14	-39.5%	-10	-32.4%
25% Primary Care/75% Non-Primary Care								
Cardiology	0	0.2%	-10	-14.2%	-3	-3.9%	3	5.4%
Other Internal Medicine Subspecialties	26	16.2%	-1	-0.5%	17	9.9%	35	22.3%
Obstetrics and Gynecology	1	1.3%	-5	-5.7%	-3	-3.4%	5	6.6%
Pathology	-12	-36.0%	-17	-45.2%	-14	-39.6%	-10	-32.6%
20% Primary Care/80% Non-Primary Care								
Cardiology	0	0.0%	-10	-14.4%	-3	-4.1%	3	5.2%
Other Internal Medicine Subspecialties	26	16.0%	-1	-0.7%	17	9.7%	34	22.1%
Obstetrics and Gynecology	1	1.1%	-5	-5.9%	-3	-3.6%	5	6.4%
Pathology	-12	-36.1%	-17	-45.3%	-14	-39.8%	-10	-32.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-16	-15.6%	-33	-27.7%	-21	-19.4%	-11	-11.1%
Anesthesiology	-1	-0.7%	-18	-15.0%	-6	-5.9%	4	4.5%
Radiology	9	6.9%	-13	-8.5%	1	0.8%	15	12.5%
Emergency Medicine	48	55.1%	42	44.4%	53	62.9%	53	63.2%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-16	-15.8%	-34	-27.9%	-21	-19.7%	-11	-11.4%
Anesthesiology	-1	-1.1%	-18	-15.3%	-7	-6.2%	4	4.1%
Radiology	8	6.5%	-13	-8.8%	1	0.5%	15	12.1%
Emergency Medicine	48	54.6%	42	43.9%	52	62.3%	52	62.7%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-16	-16.0%	-34	-28.1%	-21	-19.9%	-11	-11.6%
Anesthesiology	-1	-1.3%	-18	-15.4%	-7	-6.4%	4	3.9%
Radiology	8	6.3%	-13	-9.0%	0	0.3%	14	11.9%
Emergency Medicine	48	54.3%	41	43.7%	52	62.0%	52	62.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-25	-24.4%	-42	-35.3%	-30	-27.9%	-20	-20.4%
Anesthesiology	-9	-9.1%	-26	-22.2%	-15	-13.8%	-4	-4.4%
Radiology	-3	-2.1%	-24	-16.1%	-10	-7.6%	4	3.1%
Emergency Medicine	39	44.4%	33	34.5%	43	51.7%	43	52.0%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-25	-24.7%	-43	-35.5%	-30	-28.1%	-20	-20.7%
Anesthesiology	-10	-9.4%	-26	-22.4%	-15	-14.1%	-4	-4.7%
Radiology	-3	-2.4%	-24	-16.4%	-11	-7.9%	3	2.8%
Emergency Medicine	39	43.9%	32	34.0%	43	51.2%	43	51.5%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-26	-24.8%	-43	-35.6%	-31	-28.3%	-20	-20.8%
Anesthesiology	-10	-9.6%	-27	-22.6%	-15	-14.3%	-5	-4.8%
Radiology	-3	-2.6%	-25	-16.6%	-11	-8.1%	3	2.6%
Emergency Medicine	38	43.7%	32	33.8%	43	50.9%	43	51.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	6	7.4%	-8	-8.0%	2	1.9%	10	13.1%
Ophthalmology	-15	-28.7%	-23	-38.9%	-16	-30.1%	-12	-24.9%
Otolaryngology	-3	-13.0%	-6	-25.5%	-3	-16.4%	-2	-8.4%
Orthopedic Surgery	1	1.6%	-8	-13.0%	-3	-4.4%	4	7.0%
25% Primary Care/75% Non-Primary Care								
General Surgery	6	7.1%	-8	-8.3%	1	1.6%	10	12.7%
Ophthalmology	-15	-28.9%	-23	-39.1%	-16	-30.4%	-12	-25.2%
Otolaryngology	-3	-13.2%	-6	-25.7%	-3	-16.7%	-2	-8.7%
Orthopedic Surgery	1	1.3%	-8	-13.2%	-3	-4.7%	3	6.7%
20% Primary Care/80% Non-Primary Care								
General Surgery	6	6.9%	-8	-8.5%	1	1.4%	10	12.5%
Ophthalmology	-15	-29.1%	-23	-39.2%	-16	-30.5%	-12	-25.3%
Otolaryngology	-3	-13.4%	-6	-25.8%	-4	-16.8%	-2	-8.8%
Orthopedic Surgery	1	1.1%	-8	-13.4%	-3	-4.9%	3	6.5%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-2	-2.5%	-16	-16.5%	-7	-7.5%	2	2.6%
Ophthalmology	-18	-35.7%	-27	-44.9%	-19	-37.0%	-16	-32.3%
Otolaryngology	-4	-17.5%	-7	-29.4%	-4	-20.8%	-3	-13.2%
Orthopedic Surgery	-4	-7.5%	-13	-20.8%	-7	-13.0%	-1	-2.6%
25% Primary Care/75% Non-Primary Care								
General Surgery	-2	-2.9%	-16	-16.8%	-7	-7.8%	2	2.3%
Ophthalmology	-18	-35.9%	-27	-45.1%	-19	-37.2%	-16	-32.5%
Otolaryngology	-4	-17.8%	-7	-29.6%	-4	-21.0%	-3	-13.5%
Orthopedic Surgery	-4	-7.8%	-13	-21.0%	-8	-13.3%	-2	-2.9%
20% Primary Care/80% Non-Primary Care								
General Surgery	-3	-3.0%	-16	-17.0%	-7	-8.0%	2	2.1%
Ophthalmology	-18	-36.0%	-27	-45.2%	-19	-37.3%	-16	-32.7%
Otolaryngology	-4	-17.9%	-7	-29.7%	-4	-21.2%	-3	-13.6%
Orthopedic Surgery	-4	-8.0%	-13	-21.2%	-8	-13.5%	-2	-3.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-9	-28.5%	-14	-38.7%	-11	-32.2%	-7	-24.7%
Other Surgical Subspecialties	-10	-20.4%	-19	-31.8%	-13	-24.2%	-8	-16.2%
Other Specialties	-5	-3.6%	-30	-17.4%	-13	-8.0%	2	1.5%
25% Primary Care/75% Non-Primary Care								
Urology	-9	-28.7%	-14	-38.9%	-11	-32.4%	-7	-24.9%
Other Surgical Subspecialties	-10	-20.6%	-19	-32.0%	-13	-24.4%	-8	-16.5%
Other Specialties	-6	-3.9%	-31	-17.7%	-13	-8.3%	2	1.2%
20% Primary Care/80% Non-Primary Care								
Urology	-9	-28.8%	-14	-39.0%	-11	-32.6%	-7	-25.1%
Other Surgical Subspecialties	-10	-20.8%	-19	-32.2%	-13	-24.6%	-8	-16.6%
Other Specialties	-6	-4.1%	-31	-17.9%	-13	-8.5%	1	1.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-11	-35.3%	-16	-44.6%	-13	-38.7%	-9	-31.9%
Other Surgical Subspecialties	-14	-28.4%	-23	-38.7%	-17	-31.8%	-12	-24.6%
Other Specialties	-18	-12.2%	-43	-24.8%	-25	-16.3%	-11	-7.6%
25% Primary Care/75% Non-Primary Care								
Urology	-11	-35.5%	-16	-44.8%	-13	-38.9%	-9	-32.1%
Other Surgical Subspecialties	-14	-28.6%	-23	-38.9%	-17	-32.0%	-12	-24.9%
Other Specialties	-19	-12.5%	-44	-25.1%	-26	-16.5%	-11	-7.9%
20% Primary Care/80% Non-Primary Care								
Urology	-11	-35.6%	-16	-44.9%	-13	-39.0%	-9	-32.2%
Other Surgical Subspecialties	-14	-28.8%	-23	-39.0%	-17	-32.2%	-12	-25.0%
Other Specialties	-19	-12.7%	-44	-25.2%	-26	-16.7%	-11	-8.1%

Relationship between Physician Supply and Demand in Western New York 2030

Western New York Supply Scenario 1: Baseline

Figure 1 – Projected Difference Between Physician Supply and Demand in Western New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
All Physicians	521	13.5%	30	0.7%	338	8.4%	647	17.4%
Supply responsive to demand								
All Physicians	-153	-4.0%	-644	-14.8%	-336	-8.3%	-27	-0.7%

Figure 2 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Primary Care	102	7.8%	5	0.4%	36	2.6%	102	7.8%
Non-Primary Care	418	16.5%	25	0.9%	302	11.4%	545	22.7%
Supply responsive to demand								
Primary Care	-105	-8.0%	-202	-14.3%	-171	-12.4%	-105	-8.0%
Non-Primary Care	-48	-1.9%	-442	-15.1%	-164	-6.2%	78	3.3%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 3 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
<i>Primary Care (Overall)</i>	102	7.8%	5	0.4%	36	2.6%	102	7.8%
<i>General/Family Medicine</i>	7	1.7%	-23	-5.3%	-7	-1.6%	7	1.7%
<i>General Internal Medicine</i>	26	3.8%	-24	-3.3%	-15	-2.2%	26	3.8%
<i>General Pediatrics</i>	69	29.9%	52	21.0%	58	24.0%	69	29.9%
Supply responsive to demand								
<i>Primary Care (Overall)</i>	-105	-8.0%	-202	-14.3%	-171	-12.4%	-105	-8.0%
<i>General/Family Medicine</i>	-43	-10.5%	-73	-16.7%	-57	-13.5%	-43	-10.5%
<i>General Internal Medicine</i>	-90	-13.4%	-140	-19.3%	-132	-18.4%	-90	-13.4%
<i>General Pediatrics</i>	29	12.4%	12	4.6%	18	7.2%	29	12.4%

Non-Primary Care Specialties

Figure 4 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Cardiology	30	23.7%	9	5.9%	24	18.6%	36	30.2%
Other Internal Medicine Subspecialties	186	43.3%	114	22.7%	161	35.5%	208	50.8%
Obstetrics and Gynecology	40	23.0%	28	14.6%	32	17.3%	49	29.5%
Pathology	-23	-22.2%	-41	-33.4%	-30	-26.6%	-18	-18.1%
Supply responsive to demand								
Cardiology	4	3.1%	-17	-11.7%	-2	-1.2%	10	8.5%
Other Internal Medicine Subspecialties	84	19.5%	12	2.4%	59	13.0%	105	25.8%
Obstetrics and Gynecology	7	4.2%	-6	-3.0%	-1	-0.6%	16	9.7%
Pathology	-36	-34.1%	-53	-43.6%	-42	-37.9%	-31	-30.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Psychiatry	-9	-6.0%	-34	-19.5%	-16	-10.4%	-2	-1.1%
Anesthesiology	19	10.0%	-13	-5.8%	9	4.3%	29	15.8%
Radiology	38	18.4%	3	1.4%	26	11.7%	49	24.6%
Emergency Medicine	112	73.8%	101	61.9%	119	82.6%	120	82.9%
Supply responsive to demand								
Psychiatry	-34	-22.5%	-59	-33.6%	-41	-26.1%	-26	-18.4%
Anesthesiology	-13	-6.8%	-46	-20.2%	-24	-11.6%	-4	-1.9%
Radiology	1	0.4%	-34	-14.0%	-12	-5.3%	11	5.7%
Emergency Medicine	73	48.1%	62	37.9%	80	55.5%	81	55.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
General Surgery	30	18.7%	3	1.7%	22	12.6%	38	25.0%
Ophthalmology	-22	-21.3%	-39	-32.6%	-24	-22.9%	-17	-17.2%
Otolaryngology	0	-0.8%	-6	-15.1%	-2	-4.7%	2	4.4%
Orthopedic Surgery	14	11.3%	-7	-4.7%	6	4.6%	21	17.1%
Supply responsive to demand								
General Surgery	0	-0.1%	-27	-14.4%	-9	-5.2%	8	5.2%
Ophthalmology	-35	-34.1%	-52	-43.5%	-37	-35.4%	-30	-30.6%
Otolaryngology	-6	-15.4%	-12	-27.6%	-7	-18.8%	-4	-11.0%
Orthopedic Surgery	-7	-5.1%	-28	-18.8%	-15	-10.8%	0	-0.1%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
Urology	-15	-22.5%	-26	-33.6%	-18	-26.5%	-12	-18.4%
Other Surgical Subspecialties	-12	-13.1%	-28	-25.6%	-17	-17.3%	-8	-8.6%
Other Supecialties	30	7.4%	-38	-8.0%	10	2.4%	50	13.0%
Supply responsive to demand								
Urology	-22	-33.6%	-33	-43.2%	-26	-37.1%	-19	-30.1%
Other Surgical Subspecialties	-25	-26.6%	-41	-37.1%	-30	-30.1%	-20	-22.7%
Other Specialties	-40	-10.0%	-107	-22.9%	-59	-14.1%	-20	-5.3%

Western New York Supply Scenario 2: NP/PA High and Lower Growth

Figure 5 – Projected Difference Between Physician Supply and Demand in Western New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	997	25.9%	506	11.7%	814	20.2%	1,123	30.2%
NP/PA Lower Growth								
<i>All Physicians</i>	741	19.3%	251	5.8%	559	13.9%	868	23.3%
Supply responsive to demand								
NP/PA High Growth								
<i>All Physicians</i>	263	6.8%	-228	-5.3%	80	2.0%	389	10.5%
NP/PA Lower Growth								
<i>All Physicians</i>	46	1.2%	-444	-10.2%	-136	-3.4%	173	4.6%

Figure 6 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care	353	26.8%	256	18.1%	287	20.7%	353	26.8%
Non-Primary Care	643	25.4%	250	8.6%	527	19.9%	770	32.0%
NP/PA Lower Growth								
Primary Care	230	17.4%	133	9.4%	163	11.8%	230	17.4%
Non-Primary Care	512	20.2%	118	4.1%	396	15.0%	638	26.6%
Supply responsive to demand								
NP/PA High Growth								
Primary Care	98	7.4%	1	0.1%	32	2.3%	98	7.4%
Non-Primary Care	165	6.5%	-229	-7.8%	49	1.8%	291	12.1%
NP/PA Lower Growth								
Primary Care	-7	-0.5%	-104	-7.3%	-73	-5.3%	-7	-0.5%
Non-Primary Care	53	2.1%	-340	-11.6%	-63	-2.4%	179	7.5%

Specialty-Specific Supply and Demand Relationships
Primary Care Specialties

Figure 7 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Primary Care (Overall)	353	26.8%	256	18.1%	287	20.7%	353	26.8%
General/Family Medicine	81	19.7%	50	11.5%	67	15.8%	81	19.7%
General Internal Medicine	150	22.2%	100	13.8%	109	15.1%	150	22.2%
General Pediatrics	123	52.9%	106	42.4%	112	45.9%	123	52.9%
NP/PA Lower Growth								
Primary Care (Overall)	230	17.4%	133	9.4%	163	11.8%	230	17.4%
General/Family Medicine	44	10.8%	14	3.2%	31	7.2%	44	10.8%
General Internal Medicine	89	13.1%	39	5.4%	47	6.6%	89	13.1%
General Pediatrics	96	41.6%	79	31.9%	85	35.1%	96	41.6%
Supply responsive to demand								
NP/PA High Growth								
Primary Care (Overall)	98	7.4%	1	0.1%	32	2.3%	98	7.4%
General/Family Medicine	18	4.4%	-12	-2.8%	4	1.0%	18	4.4%
General Internal Medicine	8	1.1%	-42	-5.8%	-34	-4.7%	8	1.1%
General Pediatrics	72	31.2%	55	22.2%	61	25.2%	72	31.2%
NP/PA Lower Growth								
Primary Care (Overall)	-7	-0.5%	-104	-7.3%	-73	-5.3%	-7	-0.5%
General/Family Medicine	-14	-3.3%	-44	-9.9%	-27	-6.5%	-14	-3.3%
General Internal Medicine	-43	-6.4%	-93	-12.8%	-84	-11.8%	-43	-6.4%
General Pediatrics	50	21.5%	33	13.1%	39	15.9%	50	21.5%

Non-Primary Care Specialties

Figure 8 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Cardiology	41	33.1%	20	14.0%	36	27.6%	48	40.1%
Other Internal Medicine Subspecialties	233	54.2%	161	32.1%	208	45.9%	255	62.3%
Obstetrics and Gynecology	57	32.4%	44	23.3%	49	26.3%	66	39.4%
Pathology	-17	-16.3%	-35	-28.3%	-23	-21.0%	-12	-11.8%
NP/PA Lower Growth								
Cardiology	34	27.6%	13	9.2%	29	22.3%	41	34.3%
Other Internal Medicine Subspecialties	206	47.8%	134	26.6%	181	39.8%	227	55.6%
Obstetrics and Gynecology	47	26.9%	34	18.2%	39	21.1%	56	33.6%
Pathology	-21	-19.7%	-38	-31.3%	-27	-24.3%	-15	-15.5%
Supply responsive to demand								
NP/PA High Growth								
Cardiology	15	11.9%	-6	-4.2%	10	7.3%	21	17.8%
Other Internal Medicine Subspecialties	128	29.8%	56	11.1%	103	22.7%	150	36.6%
Obstetrics and Gynecology	23	13.1%	10	5.4%	15	7.9%	32	19.1%
Pathology	-30	-28.5%	-48	-38.8%	-36	-32.6%	-25	-24.7%
NP/PA Lower Growth								
Cardiology	9	7.3%	-12	-8.2%	4	2.8%	15	12.9%
Other Internal Medicine Subspecialties	105	24.4%	33	6.5%	80	17.7%	126	31.0%
Obstetrics and Gynecology	15	8.4%	2	1.0%	6	3.5%	24	14.1%
Pathology	-33	-31.5%	-51	-41.3%	-39	-35.4%	-28	-27.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Psychiatry	2	1.1%	-24	-13.4%	-6	-3.5%	9	6.4%
Anesthesiology	35	18.4%	3	1.4%	25	12.2%	45	24.6%
Radiology	57	27.4%	22	9.1%	44	20.2%	67	34.1%
Emergency Medicine	132	87.1%	121	74.2%	140	96.5%	140	96.9%
NP/PA Lower Growth								
Psychiatry	-5	-3.1%	-30	-17.0%	-12	-7.5%	3	2.0%
Anesthesiology	26	13.5%	-6	-2.8%	15	7.6%	36	19.4%
Radiology	46	22.1%	11	4.6%	33	15.2%	56	28.6%
Emergency Medicine	121	79.3%	109	67.0%	128	88.3%	128	88.7%
Supply responsive to demand								
NP/PA High Growth								
Psychiatry	-24	-15.8%	-49	-27.9%	-31	-19.7%	-16	-11.4%
Anesthesiology	2	1.2%	-30	-13.4%	-8	-4.1%	12	6.5%
Radiology	19	9.0%	-16	-6.6%	6	2.8%	29	14.8%
Emergency Medicine	92	60.8%	81	49.7%	100	68.9%	100	69.2%
NP/PA Lower Growth								
Psychiatry	-29	-19.3%	-55	-30.9%	-36	-23.0%	-22	-15.1%
Anesthesiology	-6	-3.0%	-38	-16.9%	-16	-8.0%	4	2.1%
Radiology	9	4.5%	-25	-10.5%	-3	-1.4%	20	10.0%
Emergency Medicine	82	54.1%	71	43.5%	90	61.9%	90	62.2%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
General Surgery	45	27.8%	18	9.4%	36	21.2%	53	34.5%
Ophthalmology	-16	-15.3%	-33	-27.5%	-18	-17.0%	-11	-10.8%
Otolaryngology	2	6.8%	-4	-8.6%	1	2.6%	4	12.4%
Orthopedic Surgery	25	19.7%	4	2.5%	17	12.6%	32	26.0%
NP/PA Lower Growth								
General Surgery	36	22.5%	9	4.9%	28	16.2%	44	28.9%
Ophthalmology	-19	-18.8%	-36	-30.5%	-21	-20.5%	-14	-14.5%
Otolaryngology	1	2.3%	-5	-12.4%	-1	-1.7%	3	7.7%
Orthopedic Surgery	19	14.8%	-3	-1.7%	11	7.9%	25	20.8%
Supply responsive to demand								
NP/PA High Growth								
General Surgery	14	8.5%	-13	-7.1%	5	3.0%	22	14.2%
Ophthalmology	-29	-28.4%	-46	-38.7%	-31	-29.8%	-24	-24.6%
Otolaryngology	-3	-8.2%	-9	-21.4%	-4	-11.8%	-1	-3.3%
Orthopedic Surgery	4	3.0%	-18	-11.8%	-4	-3.2%	10	8.4%
NP/PA Lower Growth								
General Surgery	7	4.0%	-21	-10.9%	-2	-1.3%	15	9.5%
Ophthalmology	-32	-31.4%	-49	-41.2%	-34	-32.8%	-27	-27.8%
Otolaryngology	-4	-12.0%	-10	-24.6%	-6	-15.4%	-3	-7.3%
Orthopedic Surgery	-2	-1.3%	-23	-15.4%	-10	-7.2%	5	3.9%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
NP/PA High Growth								
Urology	-11	-16.5%	-22	-28.5%	-15	-20.9%	-8	-12.1%
Other Surgical Subspecialties	-6	-6.5%	-22	-19.9%	-11	-11.0%	-1	-1.6%
Other Specialties	62	15.6%	-5	-1.0%	43	10.3%	82	21.7%
NP/PA Lower Growth								
Urology	-13	-20.0%	-24	-31.5%	-17	-24.2%	-10	-15.8%
Other Surgical Subspecialties	-10	-10.4%	-26	-23.3%	-15	-14.7%	-5	-5.7%
Other Specialties	43	10.8%	-24	-5.1%	24	5.7%	63	16.6%
Supply responsive to demand								
NP/PA High Growth								
Urology	-18	-27.9%	-30	-38.3%	-22	-31.7%	-15	-24.1%
Other Surgical Subspecialties	-19	-20.3%	-35	-31.7%	-24	-24.1%	-15	-16.1%
Other Specialties	-9	-2.3%	-76	-16.3%	-28	-6.8%	11	2.9%
NP/PA Lower Growth								
Urology	-20	-30.9%	-31	-40.8%	-24	-34.6%	-17	-27.3%
Other Surgical Subspecialties	-22	-23.6%	-38	-34.6%	-27	-27.2%	-18	-19.6%
Other Specialties	-25	-6.3%	-92	-19.8%	-45	-10.6%	-5	-1.4%

Western New York Supply Scenario 3a: Increased Retention of Physicians

Figure 9 – Projected Difference Between Physician Supply and Demand in Western New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	626	16.3%	135	3.1%	443	11.0%	752	20.2%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	626	16.3%	135	3.1%	443	11.0%	752	20.2%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	626	16.3%	135	3.1%	443	11.0%	752	20.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-64	-1.7%	-555	-12.8%	-247	-6.1%	62	1.7%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-64	-1.7%	-555	-12.8%	-247	-6.1%	62	1.7%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-64	-1.7%	-555	-12.8%	-247	-6.1%	62	1.7%

Figure 10 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	137	10.4%	40	2.8%	71	5.1%	137	10.4%
Non-Primary Care	488	19.3%	95	3.3%	372	14.1%	615	25.6%
25% Primary Care/75% Non-Primary Care								
Primary Care	129	9.8%	31	2.2%	62	4.5%	129	9.8%
Non-Primary Care	497	19.7%	104	3.6%	381	14.4%	624	26.0%
20% Primary Care/80% Non-Primary Care								
Primary Care	123	9.4%	26	1.9%	57	4.1%	123	9.4%
Non-Primary Care	502	19.9%	109	3.7%	386	14.6%	629	26.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-75	-5.7%	-172	-12.2%	-142	-10.2%	-75	-5.7%
Non-Primary Care	11	0.4%	-382	-13.1%	-105	-4.0%	138	5.7%
25% Primary Care/75% Non-Primary Care								
Primary Care	-83	-6.3%	-180	-12.7%	-149	-10.8%	-83	-6.3%
Non-Primary Care	19	0.7%	-375	-12.8%	-98	-3.7%	145	6.0%
20% Primary Care/80% Non-Primary Care								
Primary Care	-87	-6.6%	-184	-13.0%	-154	-11.1%	-87	-6.6%
Non-Primary Care	23	0.9%	-370	-12.7%	-93	-3.5%	150	6.2%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 11 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	137	10.4%	40	2.8%	71	5.1%	137	10.4%
General/Family Medicine	17	4.2%	-13	-2.9%	3	0.8%	17	4.2%
General Internal Medicine	43	6.4%	-7	-0.9%	2	0.2%	43	6.4%
General Pediatrics	77	33.1%	60	24.0%	66	27.1%	77	33.1%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	129	9.8%	31	2.2%	62	4.5%	129	9.8%
General/Family Medicine	15	3.6%	-15	-3.5%	1	0.2%	15	3.6%
General Internal Medicine	39	5.8%	-11	-1.5%	-3	-0.4%	39	5.8%
General Pediatrics	75	32.3%	58	23.2%	64	26.3%	75	32.3%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	123	9.4%	26	1.9%	57	4.1%	123	9.4%
General/Family Medicine	13	3.2%	-17	-3.9%	-1	-0.2%	13	3.2%
General Internal Medicine	36	5.4%	-14	-1.9%	-5	-0.7%	36	5.4%
General Pediatrics	74	31.9%	57	22.8%	63	25.8%	74	31.9%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-75	-5.7%	-172	-12.2%	-142	-10.2%	-75	-5.7%
General/Family Medicine	-34	-8.4%	-65	-14.7%	-48	-11.4%	-34	-8.4%
General Internal Medicine	-76	-11.3%	-126	-17.3%	-117	-16.4%	-76	-11.3%
General Pediatrics	35	15.1%	18	7.2%	24	9.9%	35	15.1%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-83	-6.3%	-180	-12.7%	-149	-10.8%	-83	-6.3%
General/Family Medicine	-37	-8.9%	-67	-15.2%	-50	-11.9%	-37	-8.9%
General Internal Medicine	-80	-11.8%	-129	-17.8%	-121	-16.9%	-80	-11.8%
General Pediatrics	33	14.4%	16	6.6%	22	9.2%	33	14.4%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-87	-6.6%	-184	-13.0%	-154	-11.1%	-87	-6.6%
General/Family Medicine	-38	-9.2%	-68	-15.5%	-52	-12.2%	-38	-9.2%
General Internal Medicine	-82	-12.1%	-132	-18.1%	-123	-17.2%	-82	-12.1%
General Pediatrics	33	14.0%	15	6.2%	21	8.8%	33	14.0%

Non-Primary Care Specialties

Figure 12 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	33	26.6%	12	8.4%	28	21.4%	39	33.3%
Other Internal Medicine Subspecialties	201	46.7%	129	25.6%	176	38.7%	222	54.4%
Obstetrics and Gynecology	46	25.9%	33	17.3%	37	20.1%	54	32.6%
Pathology	-21	-20.3%	-39	-31.8%	-28	-24.9%	-16	-16.1%
25% Primary Care/75% Non-Primary Care								
Cardiology	34	27.0%	13	8.7%	28	21.7%	40	33.6%
Other Internal Medicine Subspecialties	203	47.1%	131	26.0%	178	39.1%	224	54.9%
Obstetrics and Gynecology	46	26.3%	33	17.6%	38	20.5%	55	32.9%
Pathology	-21	-20.1%	-39	-31.6%	-27	-24.7%	-16	-15.9%
20% Primary Care/80% Non-Primary Care								
Cardiology	34	27.2%	13	8.9%	29	22.0%	40	33.9%
Other Internal Medicine Subspecialties	204	47.4%	132	26.2%	179	39.4%	225	55.1%
Obstetrics and Gynecology	47	26.5%	34	17.8%	38	20.7%	55	33.2%
Pathology	-21	-20.0%	-39	-31.5%	-27	-24.5%	-16	-15.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	7	5.5%	-14	-9.6%	2	1.2%	13	11.1%
Other Internal Medicine Subspecialties	96	22.4%	24	4.8%	72	15.8%	118	28.8%
Obstetrics and Gynecology	12	6.7%	-1	-0.6%	3	1.8%	21	12.3%
Pathology	-34	-32.6%	-52	-42.3%	-41	-36.4%	-29	-29.0%
25% Primary Care/75% Non-Primary Care								
Cardiology	7	5.8%	-14	-9.4%	2	1.5%	14	11.4%
Other Internal Medicine Subspecialties	98	22.7%	26	5.1%	73	16.1%	119	29.2%
Obstetrics and Gynecology	12	7.0%	-1	-0.3%	4	2.1%	21	12.6%
Pathology	-34	-32.4%	-52	-42.1%	-40	-36.2%	-29	-28.8%
20% Primary Care/80% Non-Primary Care								
Cardiology	8	6.0%	-13	-9.2%	2	1.7%	14	11.6%
Other Internal Medicine Subspecialties	99	23.0%	27	5.3%	74	16.3%	120	29.4%
Obstetrics and Gynecology	13	7.2%	0	-0.2%	4	2.3%	21	12.8%
Pathology	-34	-32.3%	-51	-42.0%	-40	-36.1%	-29	-28.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-6	-3.8%	-31	-17.6%	-13	-8.2%	2	1.3%
Anesthesiology	24	12.6%	-8	-3.6%	14	6.8%	34	18.5%
Radiology	44	21.2%	9	3.8%	32	14.3%	55	27.6%
Emergency Medicine	118	77.9%	107	65.7%	126	86.9%	126	87.3%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-5	-3.5%	-31	-17.4%	-13	-8.0%	2	1.5%
Anesthesiology	25	12.9%	-7	-3.3%	14	7.1%	35	18.9%
Radiology	45	21.6%	10	4.1%	32	14.6%	55	28.0%
Emergency Medicine	119	78.4%	108	66.2%	127	87.4%	127	87.8%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-5	-3.4%	-30	-17.2%	-12	-7.8%	2	1.7%
Anesthesiology	25	13.1%	-7	-3.1%	15	7.3%	35	19.1%
Radiology	45	21.8%	10	4.3%	33	14.8%	56	28.2%
Emergency Medicine	120	78.8%	109	66.5%	127	87.8%	127	88.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-31	-20.6%	-56	-32.0%	-38	-24.3%	-24	-16.5%
Anesthesiology	-9	-4.6%	-41	-18.3%	-19	-9.5%	1	0.4%
Radiology	6	2.8%	-29	-11.9%	-7	-3.0%	16	8.2%
Emergency Medicine	78	51.6%	67	41.2%	86	59.3%	86	59.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-31	-20.4%	-56	-31.8%	-38	-24.1%	-23	-16.2%
Anesthesiology	-8	-4.3%	-41	-18.0%	-19	-9.3%	1	0.7%
Radiology	7	3.1%	-28	-11.7%	-6	-2.7%	17	8.6%
Emergency Medicine	79	52.1%	68	41.6%	86	59.7%	87	60.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-31	-20.3%	-56	-31.7%	-38	-23.9%	-23	-16.1%
Anesthesiology	-8	-4.1%	-40	-17.9%	-19	-9.1%	2	0.9%
Radiology	7	3.3%	-28	-11.5%	-6	-2.6%	17	8.7%
Emergency Medicine	80	52.3%	68	41.9%	87	60.0%	87	60.3%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	35	21.5%	8	4.1%	26	15.3%	43	27.9%
Ophthalmology	-20	-19.4%	-37	-31.0%	-22	-21.1%	-15	-15.2%
Otolaryngology	1	1.6%	-5	-13.0%	-1	-2.5%	2	6.9%
Orthopedic Surgery	18	13.9%	-4	-2.5%	10	7.1%	24	19.9%
25% Primary Care/75% Non-Primary Care								
General Surgery	35	21.9%	8	4.4%	27	15.6%	44	28.3%
Ophthalmology	-20	-19.2%	-37	-30.8%	-22	-20.8%	-14	-14.9%
Otolaryngology	1	1.8%	-5	-12.8%	-1	-2.2%	2	7.2%
Orthopedic Surgery	18	14.2%	-3	-2.2%	10	7.4%	25	20.2%
20% Primary Care/80% Non-Primary Care								
General Surgery	36	22.1%	9	4.6%	27	15.8%	44	28.5%
Ophthalmology	-19	-19.1%	-37	-30.7%	-22	-20.7%	-14	-14.8%
Otolaryngology	1	2.0%	-5	-12.6%	-1	-2.0%	3	7.4%
Orthopedic Surgery	18	14.4%	-3	-2.0%	10	7.6%	25	20.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	4	2.3%	-23	-12.4%	-5	-2.9%	12	7.7%
Ophthalmology	-33	-32.5%	-50	-42.2%	-35	-33.8%	-28	-28.9%
Otolaryngology	-5	-13.4%	-11	-25.8%	-6	-16.8%	-3	-8.8%
Orthopedic Surgery	-4	-2.9%	-25	-16.8%	-12	-8.7%	3	2.3%
25% Primary Care/75% Non-Primary Care								
General Surgery	4	2.6%	-23	-12.1%	-4	-2.6%	12	8.0%
Ophthalmology	-33	-32.3%	-50	-42.0%	-35	-33.7%	-28	-28.7%
Otolaryngology	-5	-13.1%	-11	-25.6%	-6	-16.6%	-3	-8.6%
Orthopedic Surgery	-3	-2.6%	-25	-16.6%	-11	-8.4%	3	2.5%
20% Primary Care/80% Non-Primary Care								
General Surgery	5	2.8%	-23	-12.0%	-4	-2.5%	13	8.2%
Ophthalmology	-33	-32.2%	-50	-41.9%	-35	-33.5%	-28	-28.6%
Otolaryngology	-5	-13.0%	-11	-25.5%	-6	-16.4%	-3	-8.4%
Orthopedic Surgery	-3	-2.4%	-25	-16.4%	-11	-8.3%	3	2.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-14	-20.6%	-25	-32.0%	-17	-24.8%	-10	-16.4%
Other Surgical Subspecialties	-11	-11.1%	-26	-23.8%	-15	-15.3%	-6	-6.4%
Other Specialties	40	9.9%	-27	-5.9%	20	4.9%	60	15.7%
25% Primary Care/75% Non-Primary Care								
Urology	-13	-20.4%	-25	-31.8%	-17	-24.6%	-10	-16.2%
Other Surgical Subspecialties	-10	-10.8%	-26	-23.6%	-15	-15.1%	-6	-6.1%
Other Specialties	41	10.3%	-26	-5.6%	22	5.2%	61	16.1%
20% Primary Care/80% Non-Primary Care								
Urology	-13	-20.2%	-24	-31.7%	-17	-24.4%	-10	-16.0%
Other Surgical Subspecialties	-10	-10.7%	-26	-23.5%	-15	-14.9%	-5	-6.0%
Other Specialties	42	10.4%	-25	-5.4%	22	5.4%	62	16.3%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-21	-32.0%	-32	-41.8%	-25	-35.6%	-18	-28.5%
Other Surgical Subspecialties	-24	-24.8%	-40	-35.6%	-28	-28.4%	-19	-20.9%
Other Specialties	-31	-7.8%	-98	-21.1%	-51	-12.1%	-11	-3.0%
25% Primary Care/75% Non-Primary Care								
Urology	-21	-31.8%	-32	-41.6%	-25	-35.4%	-18	-28.3%
Other Surgical Subspecialties	-23	-24.6%	-39	-35.4%	-28	-28.2%	-19	-20.6%
Other Specialties	-30	-7.6%	-97	-20.8%	-50	-11.8%	-10	-2.7%
20% Primary Care/80% Non-Primary Care								
Urology	-21	-31.7%	-32	-41.5%	-25	-35.3%	-18	-28.1%
Other Surgical Subspecialties	-23	-24.5%	-39	-35.3%	-28	-28.1%	-18	-20.5%
Other Specialties	-30	-7.4%	-97	-20.7%	-49	-11.7%	-10	-2.5%

Figure 13 – Projected Difference Between Physician Supply and Demand in Western New York in 2030

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	416	10.8%	-75	-1.7%	233	5.8%	542	14.6%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	416	10.8%	-75	-1.7%	233	5.8%	542	14.6%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	416	10.8%	-75	-1.7%	233	5.8%	542	14.6%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
<i>All Physicians</i>	-242	-6.3%	-733	-16.9%	-425	-10.5%	-116	-3.1%
25% Primary Care/75% Non-Primary Care								
<i>All Physicians</i>	-242	-6.3%	-733	-16.9%	-425	-10.5%	-116	-3.1%
20% Primary Care/80% Non-Primary Care								
<i>All Physicians</i>	-242	-6.3%	-733	-16.9%	-425	-10.5%	-116	-3.1%

Figure 14 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Primary Care and Non-Primary Care Specialties

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	67	5.1%	-30	-2.1%	1	0.1%	67	5.1%
Non-Primary Care	348	13.8%	-45	-1.5%	232	8.8%	475	19.8%
25% Primary Care/75% Non-Primary Care								
Primary Care	76	5.8%	-21	-1.5%	10	0.7%	76	5.8%
Non-Primary Care	340	13.4%	-54	-1.8%	223	8.4%	466	19.4%
20% Primary Care/80% Non-Primary Care								
Primary Care	81	6.2%	-16	-1.1%	15	1.1%	81	6.2%
Non-Primary Care	334	13.2%	-59	-2.0%	218	8.2%	461	19.2%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care	-135	-10.2%	-232	-16.4%	-201	-14.5%	-135	-10.2%
Non-Primary Care	-108	-4.3%	-501	-17.1%	-224	-8.5%	19	0.8%
25% Primary Care/75% Non-Primary Care								
Primary Care	-127	-9.6%	-224	-15.9%	-194	-14.0%	-127	-9.6%
Non-Primary Care	-115	-4.5%	-508	-17.4%	-231	-8.7%	11	0.5%
20% Primary Care/80% Non-Primary Care								
Primary Care	-123	-9.3%	-220	-15.5%	-189	-13.7%	-123	-9.3%
Non-Primary Care	-119	-4.7%	-513	-17.5%	-236	-8.9%	7	0.3%

Specialty-Specific Supply and Demand Relationships
 Primary Care Specialties

Figure 15 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	67	5.1%	-30	-2.1%	1	0.1%	67	5.1%
General/Family Medicine	-3	-0.8%	-33	-7.6%	-17	-4.0%	-3	-0.8%
General Internal Medicine	9	1.3%	-41	-5.7%	-33	-4.6%	9	1.3%
General Pediatrics	62	26.7%	45	18.0%	51	20.9%	62	26.7%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	76	5.8%	-21	-1.5%	10	0.7%	76	5.8%
General/Family Medicine	-1	-0.2%	-31	-7.0%	-15	-3.4%	-1	-0.2%
General Internal Medicine	13	1.9%	-37	-5.1%	-28	-4.0%	13	1.9%
General Pediatrics	64	27.5%	47	18.8%	53	21.7%	64	27.5%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	81	6.2%	-16	-1.1%	15	1.1%	81	6.2%
General/Family Medicine	1	0.2%	-29	-6.7%	-13	-3.1%	1	0.2%
General Internal Medicine	16	2.3%	-34	-4.7%	-26	-3.6%	16	2.3%
General Pediatrics	65	28.0%	48	19.2%	54	22.2%	65	28.0%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Primary Care (Overall)	-135	-10.2%	-232	-16.4%	-201	-14.5%	-135	-10.2%
General/Family Medicine	-52	-12.7%	-82	-18.7%	-66	-15.6%	-52	-12.7%
General Internal Medicine	-105	-15.5%	-155	-21.3%	-146	-20.4%	-105	-15.5%
General Pediatrics	22	9.6%	5	2.1%	11	4.6%	22	9.6%
25% Primary Care/75% Non-Primary Care								
Primary Care (Overall)	-127	-9.6%	-224	-15.9%	-194	-14.0%	-127	-9.6%
General/Family Medicine	-50	-12.2%	-80	-18.2%	-64	-15.1%	-50	-12.2%
General Internal Medicine	-101	-15.0%	-151	-20.8%	-143	-19.9%	-101	-15.0%
General Pediatrics	24	10.3%	7	2.7%	13	5.3%	24	10.3%
20% Primary Care/80% Non-Primary Care								
Primary Care (Overall)	-123	-9.3%	-220	-15.5%	-189	-13.7%	-123	-9.3%
General/Family Medicine	-49	-11.9%	-79	-17.9%	-63	-14.7%	-49	-11.9%
General Internal Medicine	-99	-14.6%	-149	-20.5%	-140	-19.6%	-99	-14.6%
General Pediatrics	25	10.7%	8	3.1%	14	5.7%	25	10.7%

Non-Primary Care Specialties

Figure 16 – Projected Difference Between Physician Supply and Demand in Western New York in 2030, Detailed Specialty Relationships

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	26	20.7%	5	3.4%	21	15.8%	32	27.1%
Other Internal Medicine Subspecialties	172	39.9%	99	19.8%	147	32.3%	193	47.2%
Obstetrics and Gynecology	35	20.1%	22	11.8%	27	14.6%	44	26.4%
Pathology	-25	-24.0%	-43	-35.0%	-32	-28.4%	-20	-20.0%
25% Primary Care/75% Non-Primary Care								
Cardiology	25	20.3%	4	3.1%	20	15.4%	32	26.7%
Other Internal Medicine Subspecialties	170	39.5%	98	19.4%	145	31.9%	191	46.8%
Obstetrics and Gynecology	35	19.7%	22	11.5%	26	14.2%	44	26.0%
Pathology	-25	-24.3%	-43	-35.1%	-32	-28.6%	-20	-20.3%
20% Primary Care/80% Non-Primary Care								
Cardiology	25	20.1%	4	2.9%	20	15.2%	31	26.4%
Other Internal Medicine Subspecialties	169	39.2%	96	19.2%	144	31.7%	190	46.5%
Obstetrics and Gynecology	34	19.5%	21	11.3%	26	14.0%	43	25.8%
Pathology	-26	-24.4%	-43	-35.3%	-32	-28.7%	-20	-20.4%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Cardiology	1	0.6%	-20	-13.9%	-5	-3.5%	7	5.9%
Other Internal Medicine Subspecialties	72	16.7%	0	-0.1%	47	10.3%	93	22.8%
Obstetrics and Gynecology	3	1.7%	-10	-5.3%	-6	-3.0%	12	7.1%
Pathology	-38	-35.7%	-55	-45.0%	-44	-39.4%	-32	-32.3%
25% Primary Care/75% Non-Primary Care								
Cardiology	0	0.3%	-21	-14.1%	-5	-3.8%	7	5.6%
Other Internal Medicine Subspecialties	70	16.3%	-2	-0.4%	45	10.0%	92	22.4%
Obstetrics and Gynecology	2	1.4%	-11	-5.6%	-6	-3.3%	11	6.7%
Pathology	-38	-35.9%	-55	-45.1%	-44	-39.6%	-32	-32.5%
20% Primary Care/80% Non-Primary Care								
Cardiology	0	0.1%	-21	-14.3%	-5	-4.0%	6	5.4%
Other Internal Medicine Subspecialties	69	16.1%	-3	-0.6%	45	9.8%	91	22.2%
Obstetrics and Gynecology	2	1.2%	-11	-5.7%	-6	-3.5%	11	6.5%
Pathology	-38	-36.0%	-55	-45.2%	-44	-39.7%	-33	-32.7%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-12	-8.3%	-38	-21.5%	-20	-12.5%	-5	-3.4%
Anesthesiology	14	7.4%	-18	-8.0%	4	1.8%	24	13.0%
Radiology	32	15.6%	-2	-1.0%	20	9.0%	43	21.7%
Emergency Medicine	106	69.7%	95	58.0%	113	78.2%	113	78.6%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-13	-8.6%	-38	-21.7%	-20	-12.8%	-5	-3.7%
Anesthesiology	14	7.0%	-19	-8.3%	3	1.5%	23	12.7%
Radiology	32	15.2%	-3	-1.3%	19	8.7%	42	21.3%
Emergency Medicine	105	69.2%	94	57.5%	112	77.7%	113	78.1%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-13	-8.7%	-38	-21.8%	-20	-12.9%	-6	-3.9%
Anesthesiology	13	6.9%	-19	-8.5%	3	1.3%	23	12.5%
Radiology	31	15.0%	-4	-1.5%	19	8.5%	42	21.1%
Emergency Medicine	105	68.8%	93	57.2%	112	77.3%	112	77.7%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Psychiatry	-37	-24.3%	-62	-35.2%	-44	-27.8%	-29	-20.4%
Anesthesiology	-17	-9.0%	-50	-22.1%	-28	-13.8%	-8	-4.3%
Radiology	-4	-2.0%	-39	-16.1%	-17	-7.6%	6	3.2%
Emergency Medicine	68	44.5%	56	34.6%	75	51.8%	75	52.1%
25% Primary Care/75% Non-Primary Care								
Psychiatry	-37	-24.6%	-62	-35.4%	-44	-28.0%	-30	-20.6%
Anesthesiology	-18	-9.3%	-50	-22.3%	-29	-14.0%	-8	-4.6%
Radiology	-5	-2.3%	-40	-16.3%	-17	-7.8%	6	2.9%
Emergency Medicine	67	44.1%	56	34.2%	74	51.3%	75	51.7%
20% Primary Care/80% Non-Primary Care								
Psychiatry	-37	-24.7%	-63	-35.5%	-45	-28.2%	-30	-20.8%
Anesthesiology	-18	-9.5%	-51	-22.5%	-29	-14.2%	-9	-4.7%
Radiology	-5	-2.5%	-40	-16.5%	-18	-8.0%	5	2.7%
Emergency Medicine	67	43.8%	55	33.9%	74	51.1%	74	51.4%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	26	15.9%	-1	-0.8%	17	9.9%	34	22.0%
Ophthalmology	-24	-23.2%	-41	-34.2%	-26	-24.7%	-19	-19.1%
Otolaryngology	-1	-3.2%	-7	-17.1%	-3	-7.0%	1	1.9%
Orthopedic Surgery	11	8.6%	-10	-7.0%	3	2.1%	17	14.3%
25% Primary Care/75% Non-Primary Care								
General Surgery	25	15.5%	-2	-1.1%	16	9.6%	33	21.6%
Ophthalmology	-24	-23.4%	-41	-34.4%	-26	-25.0%	-19	-19.4%
Otolaryngology	-1	-3.5%	-7	-17.3%	-3	-7.3%	1	1.6%
Orthopedic Surgery	11	8.3%	-11	-7.3%	2	1.8%	17	14.0%
20% Primary Care/80% Non-Primary Care								
General Surgery	25	15.3%	-2	-1.2%	16	9.4%	33	21.4%
Ophthalmology	-24	-23.5%	-41	-34.5%	-26	-25.1%	-19	-19.5%
Otolaryngology	-1	-3.6%	-7	-17.5%	-3	-7.4%	0	1.4%
Orthopedic Surgery	10	8.1%	-11	-7.4%	2	1.6%	17	13.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
General Surgery	-4	-2.5%	-31	-16.5%	-13	-7.5%	4	2.7%
Ophthalmology	-36	-35.6%	-53	-44.9%	-38	-36.9%	-31	-32.2%
Otolaryngology	-6	-17.4%	-12	-29.3%	-8	-20.7%	-4	-13.1%
Orthopedic Surgery	-9	-7.4%	-31	-20.7%	-18	-13.0%	-3	-2.5%
25% Primary Care/75% Non-Primary Care								
General Surgery	-4	-2.7%	-32	-16.7%	-13	-7.7%	4	2.4%
Ophthalmology	-37	-35.8%	-54	-45.0%	-39	-37.1%	-31	-32.4%
Otolaryngology	-6	-17.7%	-12	-29.5%	-8	-20.9%	-5	-13.4%
Orthopedic Surgery	-10	-7.7%	-31	-20.9%	-18	-13.2%	-3	-2.8%
20% Primary Care/80% Non-Primary Care								
General Surgery	-5	-2.9%	-32	-16.9%	-13	-7.9%	3	2.2%
Ophthalmology	-37	-35.9%	-54	-45.1%	-39	-37.2%	-32	-32.6%
Otolaryngology	-6	-17.9%	-12	-29.7%	-8	-21.1%	-5	-13.5%
Orthopedic Surgery	-10	-7.9%	-32	-21.1%	-18	-13.4%	-4	-3.0%

	Demand Scenario 1		Demand Scenario 2		Demand Scenario 3		Demand Scenario 4	
	Demand Baseline		Growing Economy		Universal Health Insurance by 2020		Partial Elimination of Unnecessary/Marginally-Beneficial/Duplicative Services	
	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030	Projected Difference in 2030	Projected Difference as a Percentage of Demand in 2030
Supply unresponsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-16	-24.3%	-27	-35.2%	-20	-28.3%	-13	-20.3%
Other Surgical Subspecialties	-14	-15.2%	-30	-27.4%	-19	-19.2%	-10	-10.7%
Other Specialties	19	4.8%	-48	-10.2%	0	0.0%	39	10.3%
25% Primary Care/75% Non-Primary Care								
Urology	-16	-24.5%	-27	-35.4%	-20	-28.5%	-13	-20.6%
Other Surgical Subspecialties	-15	-15.5%	-31	-27.6%	-19	-19.5%	-10	-11.0%
Other Specialties	18	4.5%	-49	-10.5%	-1	-0.3%	38	10.0%
20% Primary Care/80% Non-Primary Care								
Urology	-16	-24.7%	-27	-35.5%	-20	-28.6%	-13	-20.7%
Other Surgical Subspecialties	-15	-15.6%	-31	-27.7%	-20	-19.6%	-10	-11.2%
Other Specialties	17	4.3%	-50	-10.7%	-2	-0.5%	37	9.8%
Supply responsive to demand								
33% Primary Care/67% Non-Primary Care								
Urology	-23	-35.2%	-34	-44.5%	-27	-38.6%	-20	-31.8%
Other Surgical Subspecialties	-27	-28.3%	-43	-38.6%	-32	-31.7%	-22	-24.6%
Other Specialties	-49	-12.2%	-116	-24.8%	-68	-16.2%	-29	-7.5%
25% Primary Care/75% Non-Primary Care								
Urology	-23	-35.4%	-34	-44.7%	-27	-38.8%	-20	-32.0%
Other Surgical Subspecialties	-27	-28.6%	-43	-38.8%	-32	-32.0%	-22	-24.8%
Other Specialties	-50	-12.4%	-117	-25.0%	-69	-16.4%	-30	-7.8%
20% Primary Care/80% Non-Primary Care								
Urology	-23	-35.5%	-35	-44.8%	-27	-38.9%	-20	-32.1%
Other Surgical Subspecialties	-27	-28.7%	-43	-38.9%	-32	-32.1%	-22	-24.9%
Other Specialties	-50	-12.6%	-117	-25.1%	-70	-16.6%	-30	-8.0%

Appendix 5: Region and Specialty Groupings

Figure 1 – Composition of New York Regions

<u>Region</u>	<u>Counties Included</u>
Capital District	Albany, Columbia, Greene, Rensselaer, Saratoga, Schenectady, Warren, and Washington
Central New York	Cayuga, Cortland, Onondaga, and Oswego
Finger Lakes	Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming, and Yates
Hudson Valley	Dutchess, Orange, Putnam, Rockland, Sullivan, Ulster, and Westchester
Long Island	Nassau and Suffolk
Mohawk Valley	Fulton, Herkimer, Madison, Montgomery, Oneida, and Schoharie
New York City	Bronx, Kings, New York, Queens, and Richmond
North Country	Clinton, Essex, Franklin, Hamilton, Jefferson, Lewis, and St. Lawrence
Southern Tier	Broome, Chemung, Chenango, Delaware, Otsego, Schuyler, Steuben, Tioga, and Tompkins
Western New York	Allegany, Cattaraugus, Chautauqua, Erie, and Niagara

The forecasting models employed in this study are based upon the American Medical Association’s classification of medical specialties. In chapters 7, 8, and 9, the specialties reported are consistent with the following specialty groupings.

Figure 2 – Model Specialty Groupings

Forecasting Specialty Grouping

American Medical Association Specialty Classification

Anesthesiology

Anesthesiology

Pain Management

Pain Management (Physical Medicine and Rehabilitation)

Cardiovascular Disease

Cardiovascular Disease

Emergency Medicine

Emergency Medicine

Internal Medicine/Emergency Medicine

Medical Toxicology (Emergency Medicine)

Pediatric Emergency Medicine (Emergency Medicine)

Sports Medicine (Emergency Medicine)

General Internal Medicine

Internal Medicine

General Surgery

Abdominal Surgery

Colon & Rectal Surgery

Craniofacial Surgery

Dermatologic Surgery

General Surgery

Hand Surgery

Hand Surgery (Surgery)

Head & Neck Surgery

Oral & Maxillofacial Surgery

Pediatric Cardiothoracic Surgery

Pediatric Surgery (Surgery)

Surgical Oncology

Transplant Surgery

Trauma Surgery

Vascular Surgery

General/Family Medicine

Family Medicine

Family Medicine/Psychiatry

General Practice

Geriatric Medicine (Family Medicine)

Sports Medicine (Family Medicine)

Forecasting Specialty Grouping

Other Internal Medicine
Subspecialties

American Medical Association Specialty Classification

Adolescent Medicine (Internal Medicine)
Adolescent Medicine (Pediatrics)
Allergy
Allergy & Immunology
Clinical and Laboratory Immunology (Internal Medicine)
Clinical and Laboratory Immunology (Pediatrics)
Clinical Cardiac Electrophysiology
Clinical Laboratory Immunology (Allergy & Immunology)
Critical Care Medicine (Anesthesiology)
Critical Care Medicine (Internal Medicine)
Developmental - Behavioral Pediatrics
Diabetes
Endocrinology, Diabetes and Metabolism
Gastroenterology
Geriatric Medicine (Internal Medicine)
Hematology (Internal Medicine)
Hematology/Oncology
Hepatology
Hospitalist
Immunology
Infectious Diseases
Internal Medicine (Neurology)
Internal Medicine (Physical Medicine and Rehabilitation)
Internal Medicine (Preventive Medicine)
Internal Medicine (Psychiatry)
Internal Medicine/Family Practice
Internal Medicine/Pediatrics
Interventional Cardiology
Medical Oncology
Medical Toxicology (Pediatrics)
Neonatal-Perinatal Medicine
Nephrology
Nutrition
Obstetrics/Gyn Critical Care
Pediatric Allergy
Pediatric Anesthesiology
Pediatric Critical Care Medicine
Pediatric Emergency Medicine (Pediatrics)
Pediatric Endocrinology

Forecasting Specialty Grouping

Other Internal Medicine

Subspecialties (*cont.*)

Obstetrics and Gynecology

Ophthalmology

Orthopedic Surgery

American Medical Association Specialty Classification

Pediatric Gastroenterology

Pediatric Hematology/Oncology

Pediatric Infectious Diseases

Pediatric Nephrology

Pediatric Psychiatry/Child Psychiatry

Pediatric Pulmonology

Pediatric Radiology

Pediatric Rehabilitation Medicine

Pediatric Rheumatology

Pediatrics/Emergency Medicine

Pulmonary Critical Care Medicine

Pulmonary Disease

Rheumatology

Sports Medicine (Internal Medicine)

Sports Medicine (Pediatrics)

Surgical Critical Care (Surgery)

Gynecological Oncology

Gynecology

Maternal & Fetal Medicine

Obstetrics

Obstetrics & Gynecology

Reproductive Endocrinology

Ophthalmology

Pediatric Ophthalmology

Adult Reconstructive Orthopedics

Foot and Ankle, Orthopedics

Hand Surgery (Orthopedic)

Musculoskeletal Oncology

Orthopedic Surgery

Orthopedic Surgery of the Spine

Orthopedic Trauma

Pediatric Orthopedics

Sports Medicine (Orthopedic Surgery)

Forecasting Specialty Grouping

Other Specialties

American Medical Association Specialty Classification

Addiction Medicine
Aerospace Medicine
Child and Adolescent Psychiatry
Child Neurology
Clinical and Laboratory Dermatological Immunology
Clinical Biochemical Genetics
Clinical Cytogenetics
Clinical Genetics
Clinical Molecular Genetics
Clinical Neurophysiology
Clinical Pharmacology
Dermatology
Epidemiology
General Preventive Medicine
Legal Medicine
Medical Genetics
Medical Management
Medical Toxicology (Preventive Medicine)
Molecular Genetic Pathology
Neurodevelopmental Disabilities (Pediatrics)
Neurodevelopmental Disabilities (Psychiatry/Neurology)
Neurology
Neuropsychiatry
Nuclear Medicine
Occupational Medicine
Osteopathic Manipulative Medicine
Other (i.e., a specialty other than those appearing above)
Pain Medicine
Palliative Medicine
Pediatric Cardiology
Pediatrics - Medical Genetics
Pharmaceutical Medicine
Phlebology
Physical Medicine & Rehabilitation
Procedural Dermatology
Proctology
Psychosomatic Medicine
Public Health/General Preventive Medicine
Radiation Oncology
Sleep Medicine

Forecasting Specialty Grouping

Other Specialties (*cont.*)

American Medical Association Specialty Classification

Spinal Cord Injury Medicine
Sports Medicine (Physical Medicine & Rehabilitation)
Undersea & Hyperbaric Medicine
Unspecified
Urgent Care Medicine
Vascular Medicine
Vascular Neurology

Other Surgery Subspecialties

Cosmetic Surgery
Facial Plastic Surgery
Hand Surgery (Plastic Surgery)
Neurological Surgery
Pediatric Surgery (Neurology)
Plastic Surgery
Plastic Surgery within the Head & Neck
Thoracic Surgery

Otolaryngology

Otolaryngology
Otology/Neurotology
Pediatric Otolaryngology

Pathology

Anatomic Pathology
Anatomic/Clinical Pathology
Blood Banking/Transfusion Medicine
Chemical Pathology
Clinical Pathology
Cytopathology
Dermatopathology
Forensic Pathology
Hematology (Pathology)
Medical Microbiology
Neuropathology
Pediatric Pathology
Selective Pathology

General Pediatrics

Pediatrics

Psychiatry

Addiction Psychiatry
Forensic Psychiatry
Geriatric Psychiatry
Psychiatry
Psychiatry/Neurology
Psychoanalysis

Forecasting Specialty Grouping

Radiology

Urology

American Medical Association Specialty Classification

Abdominal Radiology

Diagnostic Radiology

Musculoskeletal Radiology

Neurology/Diagnostic Radiology/Neuroradiology

Neuroradiology

Nuclear Radiology

Radiological Physics

Radiology

Vascular and Interventional Radiology

Pediatric Urology

Urology

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