

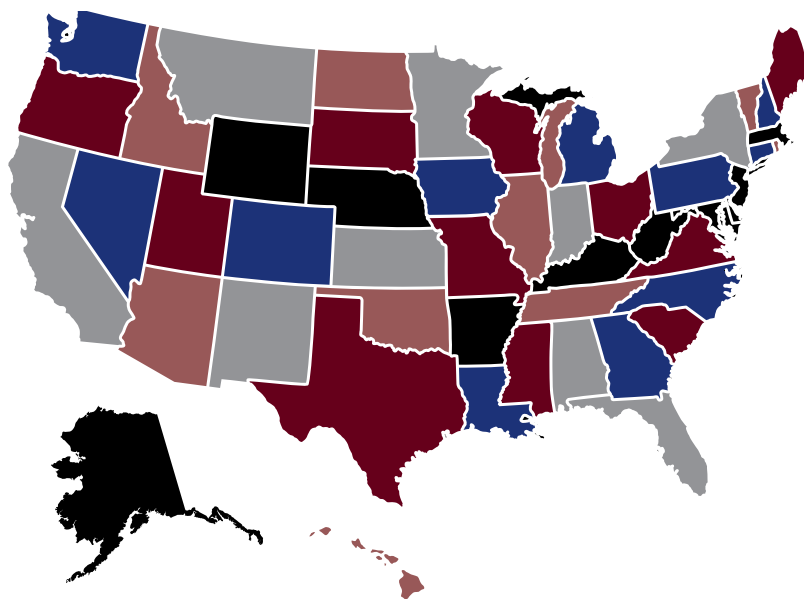
The **MedicusFIRM**

2019

Physician Placement Summary

Overview

- ➔ **53 Specialites**
51 Physician Specialties + NP/PA
- ➔ **46 States**
- ➔ **243 Clients**



Search Duration



This data is provided based on frequent client requests, but search duration is not always an appropriate indicator of success. There are numerous steps in the recruitment process, many of which fall outside of our control. Our experience is that finding the right provider is far more important than getting it done quickly. Our goal is to fill our clients' physician needs in as efficient a manner as possible. Search duration measures the amount of time passing from when The Medicus Firm is engaged to conduct a search to when the provider accepts an offer in writing. In 2018, the shortest search duration was 8 days and the average was 149 days.

The Medicus Firm, a national healthcare recruiting firm, specializes in the permanent placement of physicians and advanced practice clinicians. This annual report summarizes all provider placements made in 2018 on behalf of health systems, hospitals, medical groups and other employers. The purpose of this report is to provide industry executives with useful data for analyzing national healthcare recruiting and hiring activity, and to highlight trends in the healthcare workforce and physician recruiting.

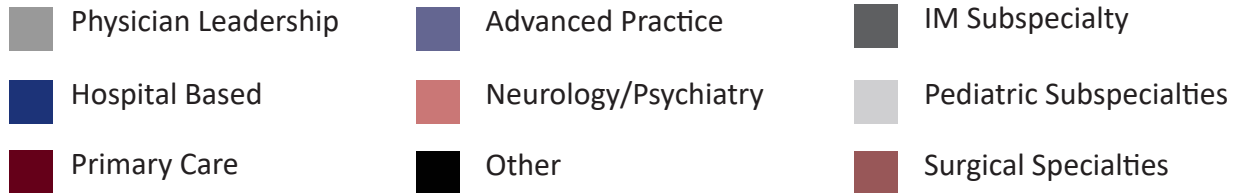
KEY HIGHLIGHTS

- **Placed Candidate Demographics:** Candidates placed with TMF's clients over the year were mostly consistent with years past: 76% were American Medical Graduates, 70% came from another practice vs coming out of training, and approximately 90% were allopathic physicians (MD's). One noteworthy change from 2018 was the percent of male providers placed as compared with females. In the preceding 4-year period, we saw a growing percentage of females placed every year going from 35% to 42%. In 2018, that number decreased to 39% of all placements, ending the trend.
- **Top Specialty Changes:** Candidates placed, grouped by type, remain largely unchanged with primary care making up the largest, but shrinking percentage of placements at just 34% overall, down from 39% last year. Making gains, as a percentage of total placements, were hospital-based specialties (anesthesia, emergency medicine, radiology, hospitalist, etc.) and internal medicine subspecialties (cardiology, pulmonary/critical care medicine, gastroenterology, endocrinology, etc.).
- **Size Communities:** Placements made in major metropolitan communities (those over 500,000 in population) were down for the 4th consecutive year to just 26% of overall placements. Conversely, placements made in rural locations (communities with less than 25,000 in population) trended up for the third consecutive year to 39%. Continued, intense competition for talent in rural communities has driven many employers to create more enticing compensation packages (salary, signing bonuses, retention bonuses and residency bonuses) to entice physicians to their location.
- **Signing Bonuses:** 2018 was consistent with 2017 results with 82% of physicians and 47% of APC's receiving a signing bonus as part of their compensation package. However, the size of the signing bonuses for physicians and APC's grew, on average, \$3,898/12.9% and \$7,292/99.44% respectively.
- **Provider Compensation:** Overall compensation for all placements grew slightly at 2.96% over 2017. Sizeable increases in compensation were led by pediatrics (10.78%), OB/GYN (8.13%) and general surgery (8.04%). A handful of specialties were placed at compensation packages lower than in the preceding year, including IM (-2.26%), GI (-1.41%) and nurse practitioners (-.58%).
- **Specialties Placed:** Top candidates placed in 2018 were nearly identical to what we've seen for the past six years, with family practice, hospitalist and internal medicine making up the top three specialties. OB/GYN, gastroenterology, and nurse practitioner have all appeared on the list in each of the last three years as well. Neurology and emergency medicine placements cracked the top ten for the first time, as psychiatry fell out of the ranking this year.

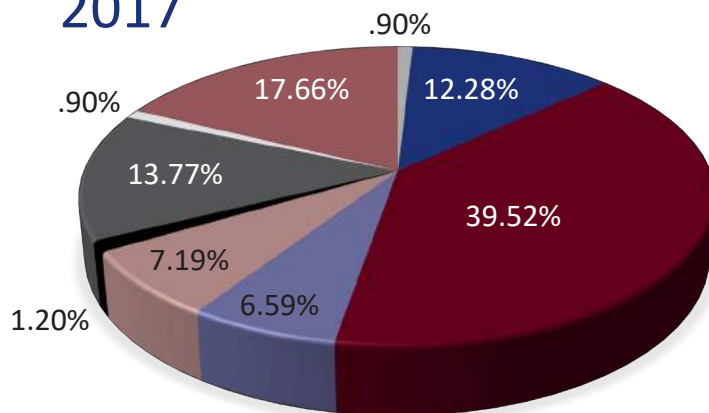
All data represented in this report are based on actual placement records of candidates hired by clients of The Medicus Firm during the calendar year 2018.



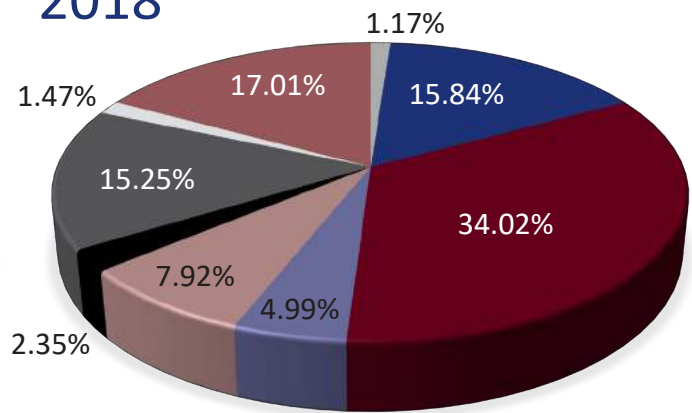
Placements by Specialty Type



2017



2018



Top 10 Specialties Placed

2016

Family Medicine
 Physician Assistant
 Internal Medicine
 Obstetrics/Gynecology
 Hospitalist
 General Surgery
 Nurse Practitioner
 Psychiatry
 Cardiology
 Gastroenterology

2017

Family Medicine
 Internal Medicine
 Hospitalist
 Gastroenterology
 Pediatrics
 Nurse Practitioner
 Obstetrics/Gynecology
 General Surgery
 Psychiatry
 Physician Assistant

2018

Family Medicine
 Hospitalist
 Internal Medicine
 Emergency Medicine
 Gastroenterology
 Neurology
 Obstetrics/Gynecology
 Nurse Practitioner
 General Surgery
 Pediatrics

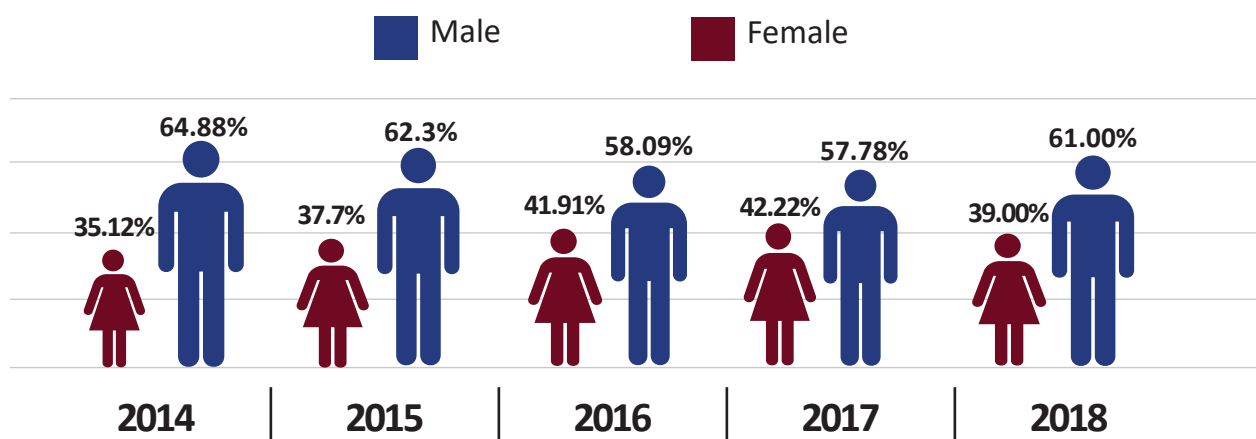
Primary care continues to dominate client hires year over year. Although internal medicine subspecialties and hospital-based medicine have been among our top specialties placed each of the last three years, in 2018 they made much more significant gains.

Eight of the top ten specialties placed remained the same, demonstrating that their high demand remains consistent. Emergency medicine and neurology were the two new entrants into the top ten most placed specialties in 2018. In addition to joining the list, they made a significant jump to 4th and 6th, respectively.

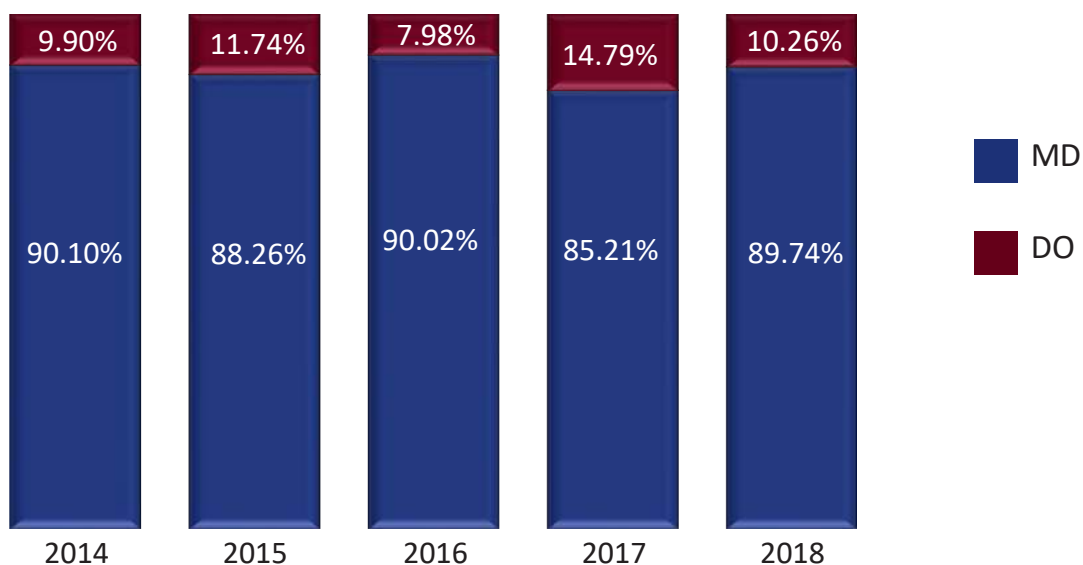
Placed candidate demographics were mostly consistent with years past with two notable exceptions:

- The placement of female providers grew in each of the past 4 years; that trend stopped in 2018. Female physicians constitute 50% of medical school enrollees but slightly less than 40% of placed candidates, decreasing by 3% from 2017.
- Physician candidates placed on J-1 visas nearly doubled (2.41% to 4.4%) from 2017 to 2018.

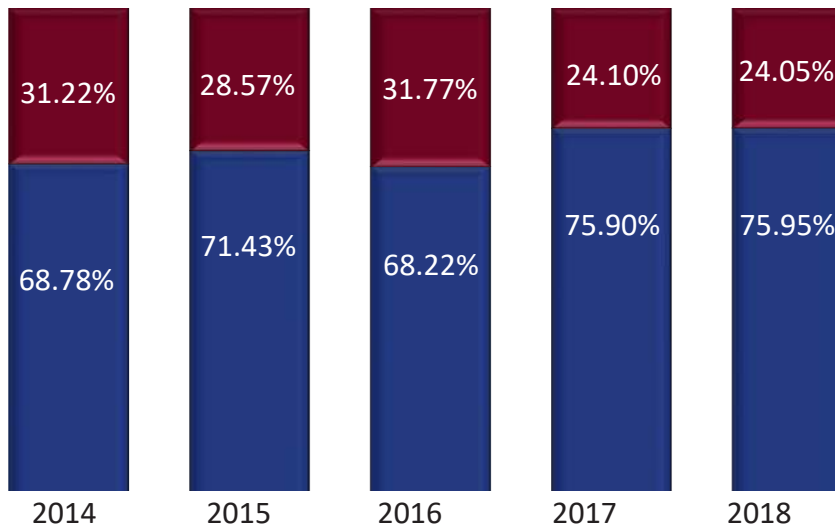
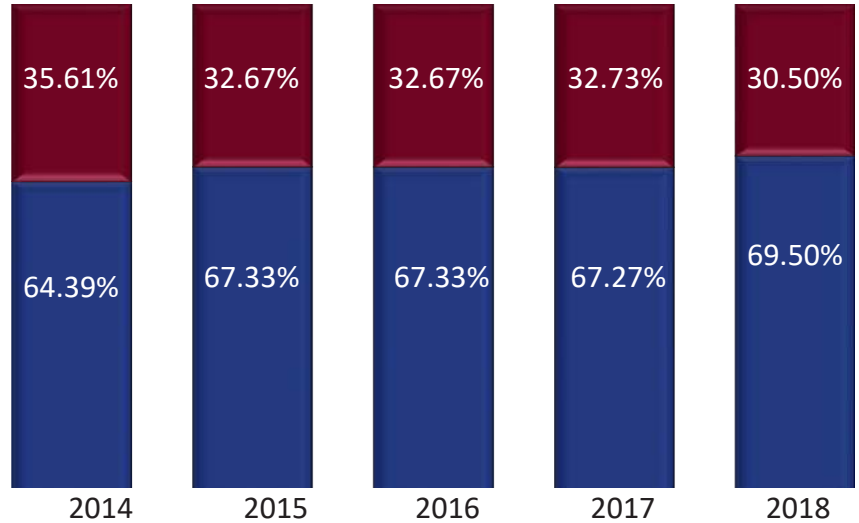
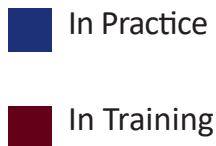
Placements by Gender



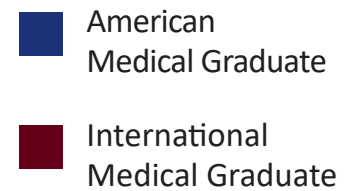
Placements by Training



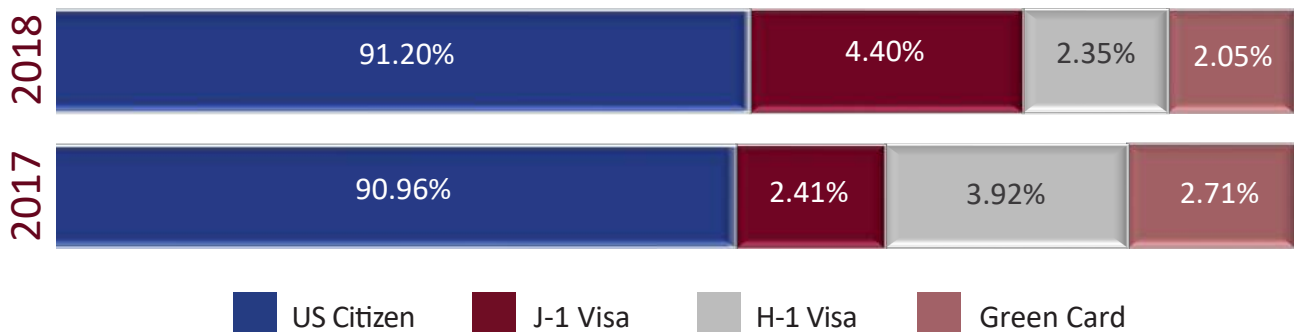
Placements by Employment



Placements by Medical School



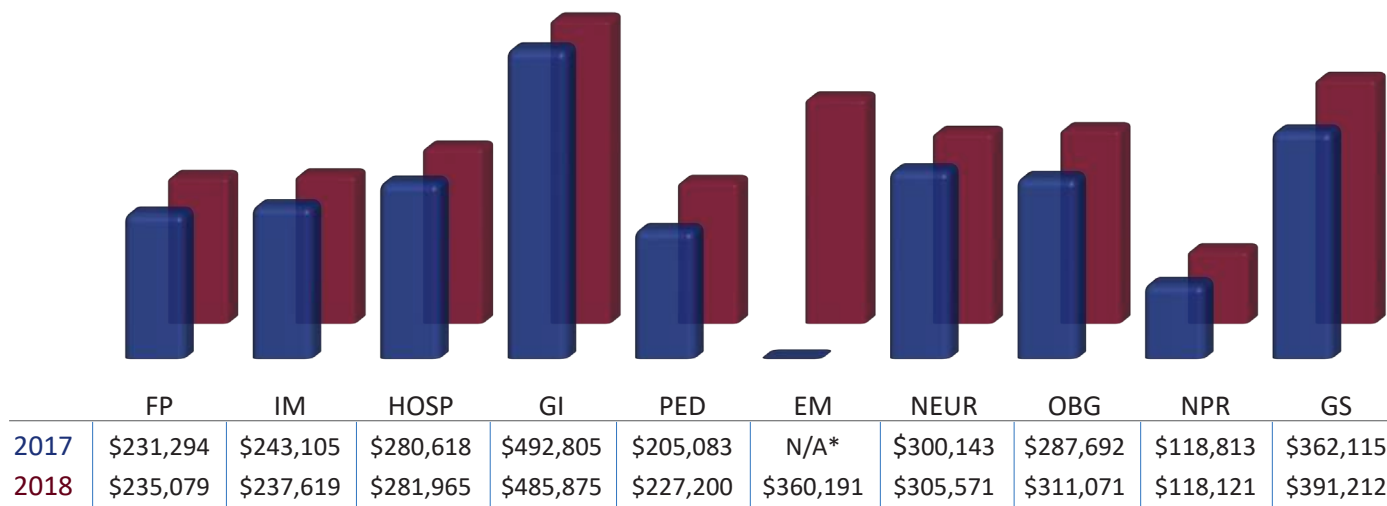
Placements by Immigration Status



Provider Compensation Trends

*Average first year salary/income guarantee

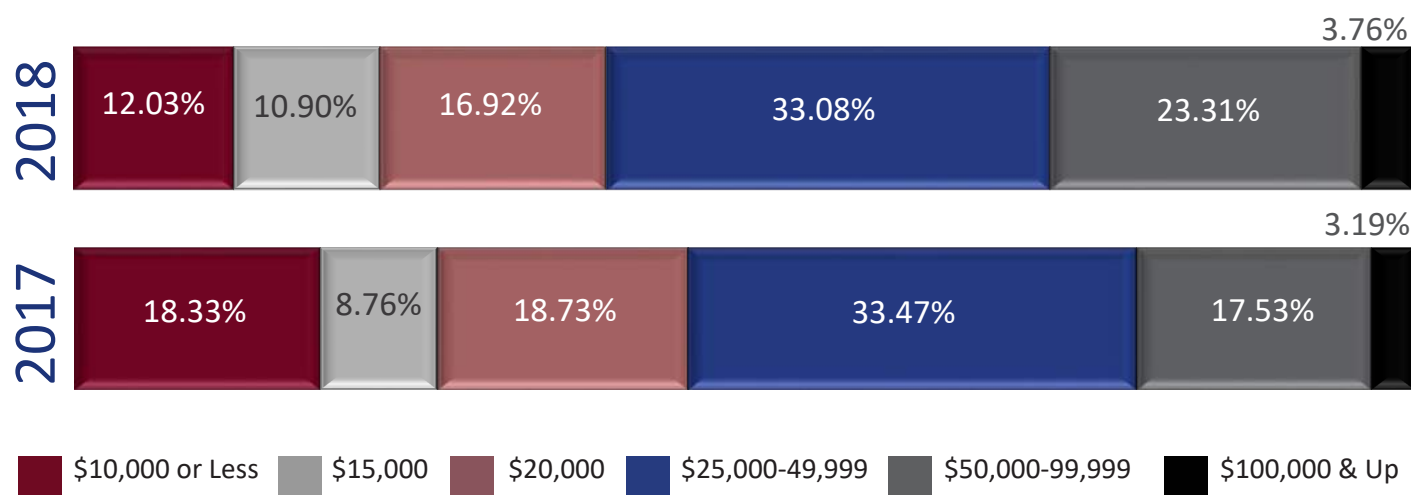
■ 2017 ■ 2018



*Insufficient data to produce a statistically valid number.

Most provider compensation trended with previous years, and increased slightly more than the cost of living at 2.96%. Signing bonuses continue to be ubiquitous in hiring physicians and the size of the signing bonuses continues to grow. Signing bonuses in excess of \$50,000 grew in frequency from 20.72% to 27.07%, representing continued, increased market competitiveness for top talent. While used far less frequently, signing bonuses offered to advanced practice clinicians nearly doubled in size.

Physician Signing Bonus Distribution

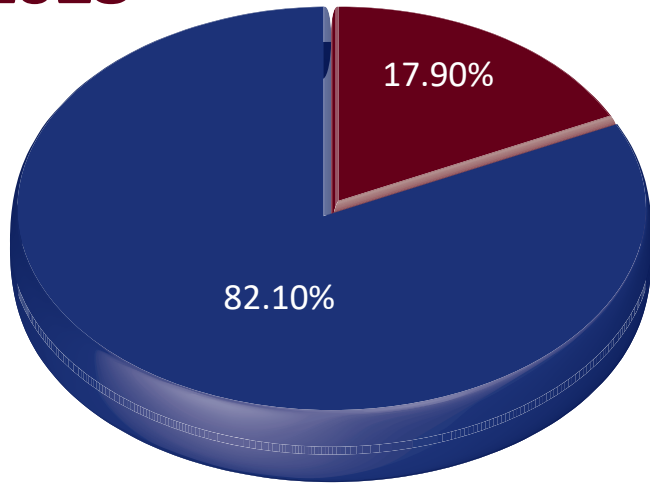


Signing Bonus Frequency

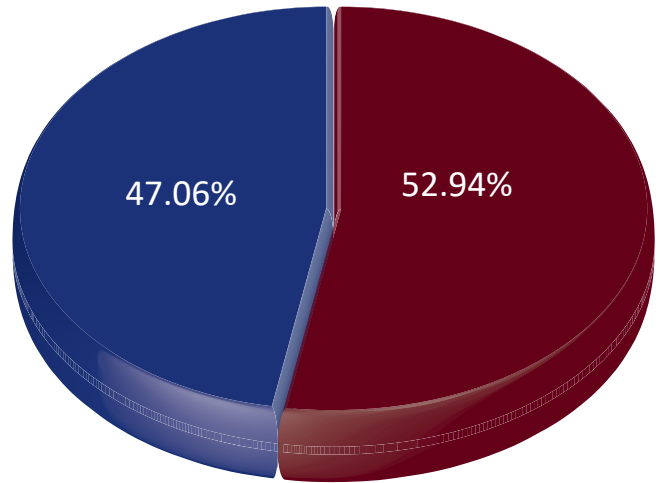
■ Yes ■ No

2018

Physicians



Advanced Practice Clinicians


2017 >

81.88% of Physicians Received a Signing Bonus

52.17% of Advanced Practice Clinicians Received a Signing Bonus

Signing Bonus Offered

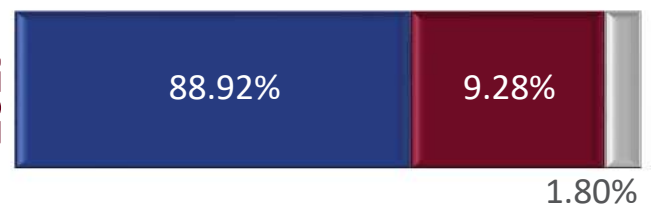
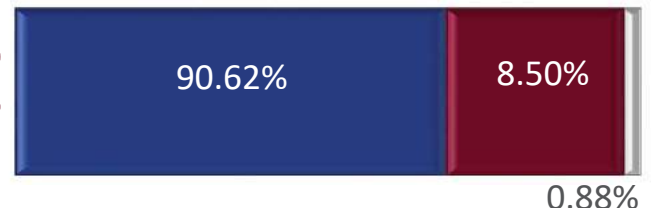
2017

	Physicians	APCs
Smallest	\$4,000	\$1,500
Average	\$29,994	\$7,333
Largest	\$200,000	\$15,000

2018

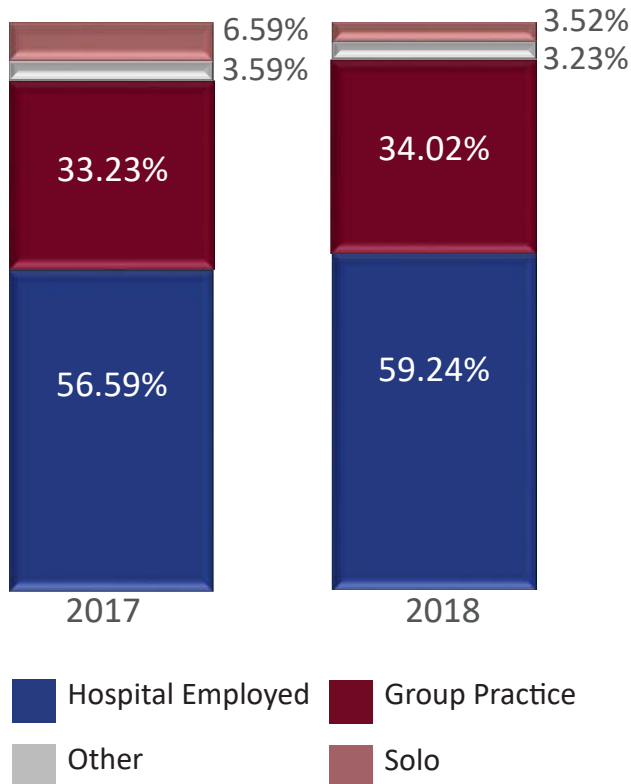
	Physicians	APCs
Smallest	\$2,500	\$2,500
Average	\$33,892	\$14,625
Largest	\$150,000	\$55,000

Placements by Offer Structure

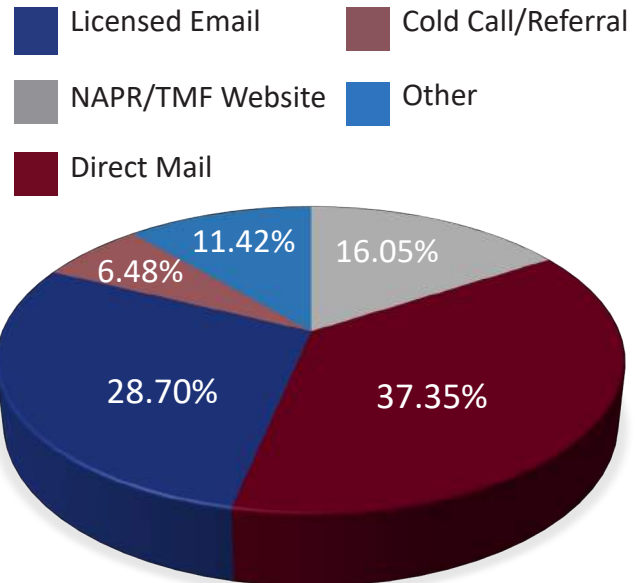
2017

2018


■ Gross Income Guarantee
■ Net Income Guaranteed
■ Hospital Employed

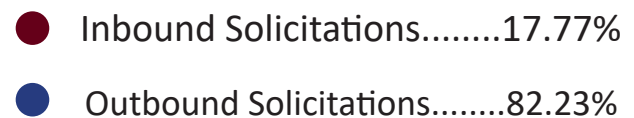
Placements by Employer



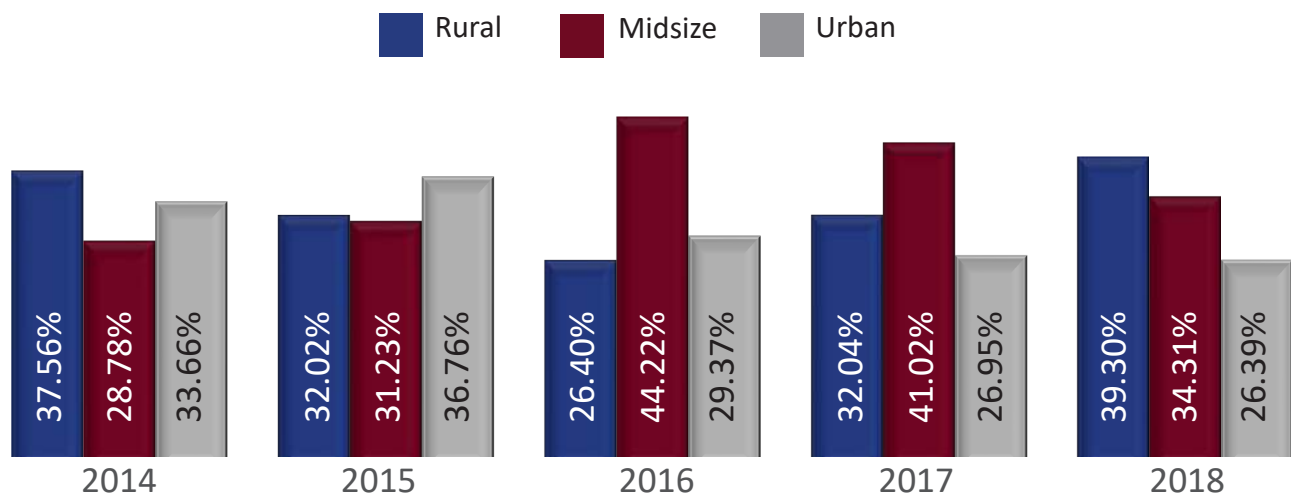
Placements by Source



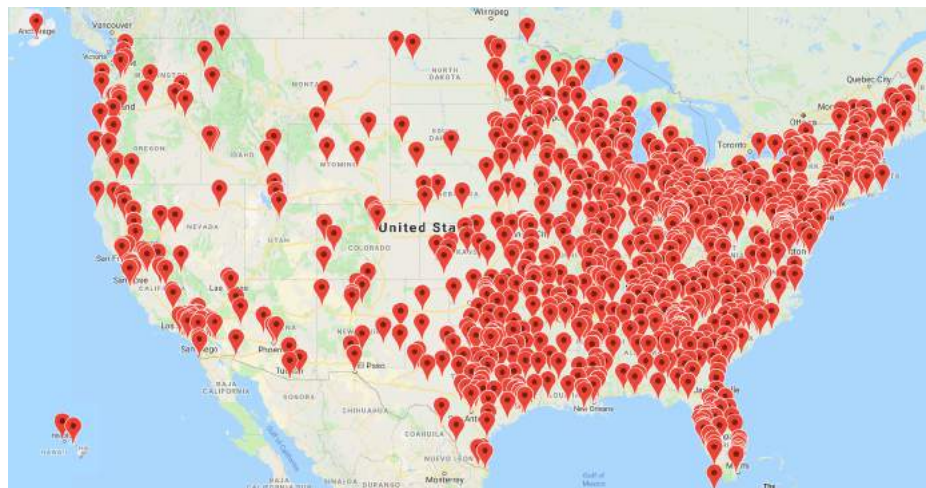
Placements by Connection



Placements by Community Size



National Coverage



Each pin drop on this map indicates a location in which we have placed at least one doctor or advanced practice clinician, and many represent 5-6 or even 10 separate clients in a given city. Additionally, many clients that we've worked with over many years represent dozens and dozens of placements.

#WeAreTMF

Since 2001, TMF has been committed to being the physician and advanced practice provider recruitment firm of choice for hospitals, physician groups and healthcare employers nationwide. TMF offers its clients:

- Unparalleled insight, guidance and consultation at the commencement of and throughout the search process. Compensation, bonus plans, physician specialty demographics and trends and strategic process management are all critical parts of the value we bring to the search process.
- Industry-leading models of candidate sourcing. Our sourcing reach and sophistication is unrivaled, which enables us to target and connect with the right candidate for your opportunity.
- Insightful, web-based progress reporting. The Medicus Firm offers its clients direct feedback we receive from candidates about their practice opportunity. From compensation to practice style to location, our progress reports and client portal put our clients in the best position to respond to candidate feedback, ensuring success.
- Properly screened and prepared candidates. Our EPiC (Evaluation of Practice & Community) Reports provide candidates with a comprehensive and mobile enabled overview of your practice, your community and the opportunity, ensuring that when you interview them, they are interested and prepared to make a decision about joining your medical community.



Call today or visit us online to set up a free consultation or to discuss our services.

Best of Staffing - Client Satisfaction

The Medicus Firm has been named to ClearlyRated's Best of Staffing List seven times in the past nine years (2019, 2018, 2017, 2016, 2014, 2013 and 2011). The Medicus Firm is the only permanent physician placement firm to now have won the award 7 times, more than double any other firm.



ASPR Strategic Corporate Partner

The Medicus Firm is a vocal and enthusiastic supporter of ASPR (Association of Staff Physician Recruiters), its members and its mission and is a proud Strategic Corporate Partner



The Medicus Firm proudly serves as an Executive Partner of the Medical Group Management Association.



The Medicus Firm is a proud and active member of the National Association of Physician Recruiters (NAPR) serving on its board of directors, vendor services committee, and education committee. To learn more about the NAPR and its membership, visit: www.NAPR.org



Forbes named The Medicus Firm among the nation's Best Professional Recruiting Firms, for 2017 & 2018.

Winner of the "Best Companies to Work for in Texas" for Ten Consecutive Years!

The Medicus Firm was selected as Best Company to Work for in Texas for the tenth consecutive year. The survey is conducted by Best Companies Group in conjunction with Texas Monthly, The Society for Human Resource Management and the Texas Association of Business. The Medicus Firm places a high value on the recruitment and retention of excellent internal talent which translates into improved outcomes on behalf of our clients.

