This Trend Report is intended to:

- Help identify emerging issues from dentists and the public that may impact the reputation of the profession.
- Serve as an additional input to national, state, and local dental society decision-makers engaged in reputation management and communications planning.
- Help identify communication gaps between ADA efforts and member perceptions.
Methodology

The list below summarizes the surveys that were deployed by the ADA in late 2022 through Q2 2023. Key learnings from those surveys are highlighted in this report. More comprehensive results from these surveys are available upon request.

**Dentist survey:**

- **Dentist Trend Report Survey** – Online survey to the Advisory Circle research panel of ADA member dentists. Fielded in April 2023 with 500 respondents and a margin of error of +/- 4.4%.

**Consumer survey:**

- **Consumer Trend Report Survey** – Online survey to 1,050 consumers fielded in April 2023 with a margin of error +/- 3%. Responses were balanced to be representative of the U.S. population as a whole.
Practice Stressors:
Dentists continue to feel the economic impact of the slowing economy on all aspects of their practices, including workforce shortages and insurance reimbursement issues.

Patient Issues:
Opioid prescriptions are being administered conservatively with minimal push back, and patients visiting a dentist under the influence of marijuana or another drug are on the rise.
Inflation

**IMPACT on Dental Practices:**
(most frequently cited responses)

1. Increased staff wages
2. Increased overhead/supply costs
3. Patients unable to pay for treatment
4. Lower profit margins

**ACTIONS They’re Taking:**
(most frequently cited responses)

1. Raised fees
2. Changed suppliers
3. Dropped some insurance plans
4. Doing more with less
5. Lowered their own salary
Stress

Over 90% of dentists reported feeling some type of stress about their career. More mid career dentists felt stress about insurance reimbursement and patients. More younger dentists reported stress about debt.

<table>
<thead>
<tr>
<th>Category</th>
<th>Major stress</th>
<th>Minor stress</th>
<th>No stress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance reimbursement</td>
<td>53%</td>
<td>37%</td>
<td>11%</td>
</tr>
<tr>
<td>Workforce shortages</td>
<td>49%</td>
<td>40%</td>
<td>12%</td>
</tr>
<tr>
<td>Patients</td>
<td>30%</td>
<td>61%</td>
<td>8%</td>
</tr>
<tr>
<td>Debt (primarily student loans)</td>
<td>22%</td>
<td>24%</td>
<td>54%</td>
</tr>
<tr>
<td>Other (inflation, staff issues, work-life-balance)</td>
<td>39%</td>
<td>13%</td>
<td>48%</td>
</tr>
</tbody>
</table>

Over the past 6 months, have you ever felt defeated, wanted to quit dentistry, or did not want to go to work?

- 7% Daily
- 14% Several times a week
- 24% Several times a month
- 20% Only occasionally
- 34% Not at all
- 14% Prefer not to answer

41% feel this at least monthly
### Pain Management

**What is your current approach to pain management medication for patients?**

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prescribe opioids when the situation warrants it</td>
<td>36%</td>
</tr>
<tr>
<td>I encourage patients to use ibuprofen or acetaminophen for pain</td>
<td>85%</td>
</tr>
<tr>
<td>I never prescribe opioids</td>
<td>21%</td>
</tr>
<tr>
<td>I try not to prescribe opioids to patients under 18</td>
<td>20%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>

**How often do patients push back and ask for stronger than over the counter pain medication?**

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequently</td>
<td>3%</td>
</tr>
<tr>
<td>Sometimes</td>
<td>20%</td>
</tr>
<tr>
<td>Seldom</td>
<td>60%</td>
</tr>
<tr>
<td>Not at all</td>
<td>16%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
</tr>
</tbody>
</table>

Young and female dentists report more pushback from patients for stronger medication.
Do any of your patients 18 or older show up for their appointment high on marijuana or another drug?

- None that I am aware of: 45%
- 1-2 patients per month: 35%
- 3-5 patients per month: 10%
- 6-10 patients per month: 4%
- 11 or more patients per month: 1%
- Don’t know: 6%

Do you have to alter/increase anesthesia in order to effectively treat these patients?

- Yes, frequently: 20%
- Yes, sometimes: 38%
- No: 31%
- Don’t know: 11%

46% reported seeing more patients under the influence than a year ago.
### Opportunity to Increase Awareness of Resources

#### How familiar are you with the ADA resources for these topics?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Very familiar</th>
<th>Somewhat familiar</th>
<th>Not very familiar</th>
<th>Not at all familiar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance offerings for ADA members</td>
<td>33%</td>
<td>48%</td>
<td>14%</td>
<td>6%</td>
</tr>
<tr>
<td>Regulatory requirements *</td>
<td>29%</td>
<td>47%</td>
<td>19%</td>
<td>5%</td>
</tr>
<tr>
<td>Discounts</td>
<td>17%</td>
<td>51%</td>
<td>26%</td>
<td>7%</td>
</tr>
<tr>
<td>Business/practice management *</td>
<td>16%</td>
<td>52%</td>
<td>25%</td>
<td>7%</td>
</tr>
<tr>
<td>Mental &amp; physical wellness *</td>
<td>12%</td>
<td>44%</td>
<td>33%</td>
<td>11%</td>
</tr>
<tr>
<td>Dental insurance/third party payer support *</td>
<td>11%</td>
<td>43%</td>
<td>34%</td>
<td>13%</td>
</tr>
<tr>
<td>Finding staff/associates</td>
<td>5%</td>
<td>35%</td>
<td>42%</td>
<td>18%</td>
</tr>
<tr>
<td>Student loan benefits</td>
<td>7%</td>
<td>28%</td>
<td>29%</td>
<td>36%</td>
</tr>
</tbody>
</table>

* These topics were also surveyed in 2022. Results were very similar, with minor decreases in 2023.
Consumer Trends to Watch

• ADA awareness is low, but understanding of the connection between oral and overall health is strong

• Consumers continue to trust their doctor the most for health information, but trust in online sources is also increasing

• Consumers predominantly seek a dentist for a dental emergency, even those without a dentist

• Consumers report lower drug use than dentists, who are seeing an increase in patients under the influence

• New this year – consumers were asked if they ever considered a career in dentistry. 15% said yes.
Opportunity to Increase Awareness of ADA

Consumers were shown logos and asked to select the top 2-3 brands they are most familiar with.

<table>
<thead>
<tr>
<th>Brand</th>
<th>Familiarity</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Heart Assoc</td>
<td>45%</td>
</tr>
<tr>
<td>American Cancer Society</td>
<td>44%</td>
</tr>
<tr>
<td>Center for Disease Control (CDC)</td>
<td>37%</td>
</tr>
<tr>
<td>American Diabetes Assoc</td>
<td>24%</td>
</tr>
<tr>
<td>World Health Organization (WHO)</td>
<td>22%</td>
</tr>
<tr>
<td>Mayo Clinic</td>
<td>18%</td>
</tr>
<tr>
<td>ADA</td>
<td>12%</td>
</tr>
<tr>
<td>AMA</td>
<td>12%</td>
</tr>
<tr>
<td>I am not familiar with any of these</td>
<td>15%</td>
</tr>
</tbody>
</table>
Nearly 2/3 of consumers believe that oral health is strongly connected to overall health.

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, I believe there is a strong connection</td>
<td>62%</td>
</tr>
<tr>
<td>Yes, I believe the two are connected in some ways</td>
<td>27%</td>
</tr>
<tr>
<td>I'm not sure, perhaps yes</td>
<td>7%</td>
</tr>
<tr>
<td>I don't think there is much of a connection</td>
<td>1%</td>
</tr>
<tr>
<td>I don't think they are connected at all</td>
<td>1%</td>
</tr>
<tr>
<td>I don't know</td>
<td>2%</td>
</tr>
</tbody>
</table>

70% from the highest income level believe this.

56% from the lowest income level believe this.
Visiting the Dentist

When was the last time you visited a dentist?

- Within the last 6 months*: 42%
- 7 to 12 months ago: 19%
- 1 to 3 years ago: 19%
- More than 3 years ago: 15%
- I don’t remember: 6%

What was the purpose of your last dental visit?

- Regular check-up/cleaning: 54%
- A treatment procedure (filling, crown, etc.): 18%
- Tooth pain/swelling/urgent issue: 15%
- Dental check-up required by doctor before surgery: 5%
- Referred by ER/doctor/nurse practitioner: 2%
- Other**: 6%

*Patients with a preferred dentist are 3X more likely to have visited a dentist in the past 6 months

** Other mentions: extractions, dentures
Where Consumers Seek Health Information
(They could select all that apply)

- I trust the info from my doctor: 54% (58%)
- I can find credible info online: 27% (28%)
- I search online sources, then trust my intuition: 26% (30%)
- Even trustworthy online sources seem to contradict: 26% (28%)
- No challenges finding health info: 10% (24%)
- Sometimes I don't know who to believe: 16% (23%)
- I don't always trust info from healthcare professionals: 20% (19%)
- I trust the people I follow on social media: 10% (19%)
- I don't align with any of these statements: 4% (4%)

Slight increase in trusting their doctor
Also slight increase in trusting online sources
Dental Emergencies

Where would you go if you had a dental emergency?

- Dental office: 46%, 71%
- Emergency room: 19%
- Urgent care facility: 10%
- Free dental clinic: 8%
- Medical doctor office: 5%
- Public health center: 4%
- Dental school clinic: 3%
- Don't know: 6%

If you had to go to the dentist for an emergency procedure, would it post a financial hardship for you?

- No financial hardship at all: 28%
- Minor financial hardship: 22%
- Moderate financial hardship: 27%
- Substantial financial hardship: 24%
Patients Under the Influence of a Drug

In the last 3 years, have you visited a dentist when you were under the influence (high) or intoxicated?

- Yes, 11%
- No, 88%
- Prefer not to answer, 1%

What were you under the influence of? (select all that apply)

- Marijuana: 47%
- Alcohol: 37%
- Antidepressant/anxiety: 27%
- Hard drugs: 18%
- Opioids: 17%
- Other: 2%
- Prefer not to say: 2%

Dentists report seeing higher drug use by patients than what they self-report.
Dental Benefits – by Dentist Status

**Have a Dentist**
Approximately 139 million U.S. adults
- **81%** Have dental benefits
- **18%** Do not have dental benefits
- **1%** Not sure

**Do Not Have a Dentist**
Approximately 113 million U.S. adults
- **37%** Do not have dental benefits
- **58%** Have dental benefits
- **5%** Not sure

**58%** (65 million) consumers without a dentist have dental benefits
Dental Benefits – Awareness

What type of dental benefit do you have?*

- Employer provided dental insurance: 40%
- Government (Medicaid, etc.): 31%
- In-office plan from my dentist: 8%
- Personal HSA: 7%
- Employer sponsored FSA: 4%
- Other: 10%

*This question was presented to those who answered “Yes” that they have dental benefits.

How familiar/knowledgeable are you with the benefits provided by your dental insurance? (i.e., annual $ benefit, co-pays, covered services, dentist network.)

- Extremely familiar: 23% (2022) / 23% (2023)
- Very familiar: 33% (2022) / 29% (2023)
- Somewhat familiar: 36% (2022) / 33% (2023)
- Not very familiar: 9% (2022) / 9% (2023)
- Not at all familiar: 3% (2022) / 2% (2023)
Dental Benefits – The Financials

What is the maximum annual per person benefit of your dental insurance?

- $500-$999: 11%
- $1,000-$1,499: 17%
- $1,500-$2,000: 21%
- More than $2,000: 11%
- My plan does not have a maximum: 10%
- I don’t know: 31%

To what extent would you say your dental insurance meets your needs?

- Completely meets my needs: 25% in 2022, 28% in 2023
- Mostly meets my needs: 47% in 2022, 44% in 2023
- Partially meets my needs: 21% in 2022, 20% in 2023
- Not close to meeting my needs: 5% in 2022, 5% in 2023
- Does not meet my needs at all: 2% in 2022, 2% in 2023

72% said their dental insurance “completely” or “mostly” meets their needs.

Yet… 51% said a dental emergency would cause them “moderate” to “substantial” hardship.
A Career in Dentistry?

Have you ever considered a career in dentistry (dentist, hygienist, dental assistant, etc.)?

Yes, 15%

- Helping people
- Dentistry is a great career
- Becoming a dental hygienist
- Becoming a dental assistant
- Promoting public health

No, 85%

- Don’t want to work inside someone’s mouth
- The high cost of dental school
- Not interested in science
- Takes too long to get a degree
- Don’t want to deal with the public
ADA.ORG/2023TrendReport