Looking Ahead – Big Trends Reshaping Dentistry

1. Shifting Practice Modalities

2. Intensified Consumerism

3. Innovations in Technology

4. Payment Reform
Today

1. Shifting Practice Modalities

2. Intensified Consumerism

3. Innovations in Technology

4. Payment Reform

New data for 2022!
Previous HPI Data
Previous HPI Data
Previous HPI Data

10.4% OF U.S. DENTISTS were affiliated with dental service organizations (DSOs) in 2019. In 2017, it was 8.8%.

How Big are Dental Service Organizations?

BY GENDER
- 13.3% FEMALE DENTISTS
- 8.7% MALE DENTISTS

BY AGE
- 20.4% 21-34
- 13.3% 35-49
- 5.4% 50-64
- 4.0% 65+

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New Data for 2022!

- **Dental Practice Size**: The number of affiliated locations within a dental practice. This could include locations directly owned and operated by a single business entity, as well as locations affiliated with each other through other arrangements such as a franchise, a parent company, or through a DSO.

- **Dental Support Organization (DSO) Affiliation**: A practice is considered to be affiliated with a DSO if some outside entity manages some or all of its non-clinical functions such as billing, marketing, human resources, etc. For the purposes of HPI’s analysis, a DSO includes any member of ADSO as well as other entities judged to be DSOs based on extensive HPI primary research.
The Data

• Based on ADA Health Policy Institute (HPI) Dental Office Database supplemented with data from Fluent.

• Significant improvement in accuracy compared to earlier data releases. Nevertheless, we had to make some methodological choices that lead us to believe we are still undercounting slightly the number of dentists affiliated with DSOs and larger groups.

• Analysis is based on all practicing dentists in the US for whom HPI can assign at least one practice location address. This includes 191,654 dentists out of 202,401 practicing dentists in the US.

• Analysis is by dentist demographics, specialty, career stage and by state.

• Data available at www.ada.org/hpi.
Dental Practice Size

Distribution of Dentists by Practice Size and Career Stage

- **1 location & 1 dentist**
- **1 location & >1 dentist**
- **2-9 locations**
- **10-49 locations**
- **50-99 locations**
- **100+ locations**

<table>
<thead>
<tr>
<th></th>
<th>All Dentists</th>
<th>Up to 10 years out of dental school</th>
<th>11 to 25 years out of dental school</th>
<th>More than 25 years out of dental school</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 location &amp; 1 dentist</td>
<td>36%</td>
<td>17%</td>
<td>38%</td>
<td>50%</td>
</tr>
<tr>
<td>1 location &amp; &gt;1 dentist</td>
<td>40%</td>
<td>47%</td>
<td>39%</td>
<td>36%</td>
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<td>2-9 locations</td>
<td>10%</td>
<td>12%</td>
<td>11%</td>
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<td>10-49 locations</td>
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<tr>
<td>100+ locations</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>5%</td>
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Dental Practice Size

Distribution of Dentists by Practice Size and Career Stage

Solo Practice

- 1 location & 1 dentist
- 1 location & >1 dentist
- 2-9 locations
- 10-49 locations
- 50-99 locations
- 100+ locations

Data from the Health Policy Institute

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Dental Practice Size

Distribution of Dentists by Practice Size and Career Stage

- 36% of All Dentists have 1 location & 1 dentist
- 40% have 1 location & >1 dentist
- 10% have 2-9 locations
- 12% have 10-49 locations
- 16% have 50-99 locations
- 19% have >100 locations

- 17% of Dentists up to 10 years out of dental school have 1 location & 1 dentist
- 47% have 1 location & >1 dentist
- 33% have 2-9 locations
- 5% have 10-49 locations
- 9% have 50-99 locations
- 3% have >100 locations

- 38% of Dentists 11 to 25 years out of dental school have 1 location & 1 dentist
- 39% have 1 location & >1 dentist
- 8% have 2-9 locations
- 3% have 10-49 locations
- 11% have 50-99 locations
- 4% have >100 locations

- 50% of Dentists More than 25 years out of dental school have 1 location & 1 dentist
- 36% have 1 location & >1 dentist
- 4% have 2-9 locations
- 0% have 10-49 locations
- 0% have 50-99 locations
- 5% have >100 locations

Practices with 10 or more affiliated locations
Dental Practice Size

Distribution of Dentists by Practice Size and Career Stage - Illinois

- 1 location & 1 dentist
- 1 location & >1 dentist
- 2-9 locations
- 10-49 locations
- 50-99 locations
- 100+ locations

<table>
<thead>
<tr>
<th>Category</th>
<th>1 location &amp; 1 dentist</th>
<th>1 location &amp; &gt;1 dentist</th>
<th>2-9 locations</th>
<th>10-49 locations</th>
<th>50-99 locations</th>
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<td>34%</td>
<td>11%</td>
<td>41%</td>
<td>5%</td>
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<td>7%</td>
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<tr>
<td>Up to 10 years out of dental school</td>
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<td>14%</td>
<td>11%</td>
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<td>14%</td>
<td>11%</td>
<td>5%</td>
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<td>7%</td>
</tr>
<tr>
<td>More than 25 years out of dental school</td>
<td>50%</td>
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<td>36%</td>
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Percent of Dentists Affiliated with a Dental Support Organization (DSO)
Some Quick Takeaways

- Practice modality continues to change. Our updated data show higher rates of dentist affiliation with DSOs as well as less dentists in solo practice and more in groups.

- There are major differences in practice modality by career stage. Early career dentists are far more likely to practice in larger groups and far more likely to be affiliated with a DSO.

- We continue to see major variation in practice modality across states. Some states are seeing much more rapid transitions than other states.

- The HPI team is pursuing several strands of research:
  - How long do dentists remain in a particular practice modality?
  - What drives the wide variation across states in practice modality?
  - Are there differences across practice modality in things like career satisfaction, work life balance, earnings, and patient outcomes?
  - What role does private equity play in driving practice consolidation?