

The Evolving Dental Practice Model

Data Update for 2022

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Looking Ahead – Big Trends Reshaping Dentistry

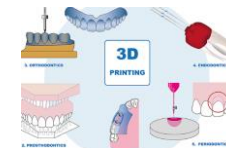
1. Shifting Practice Modalities



2. Intensified Consumerism



3. Innovations in Technology

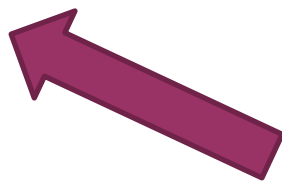


4. Payment Reform



Today

1. Shifting Practice Modalities



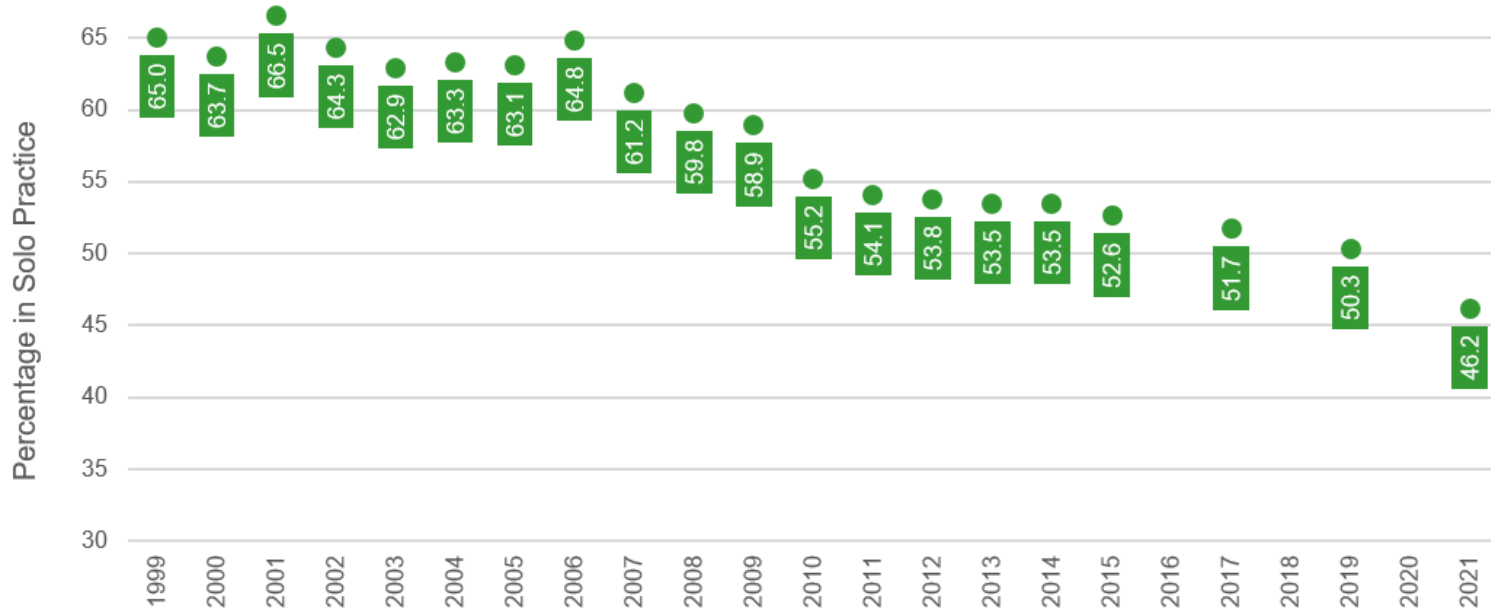
2. Intensified Consumerism

New data for 2022!

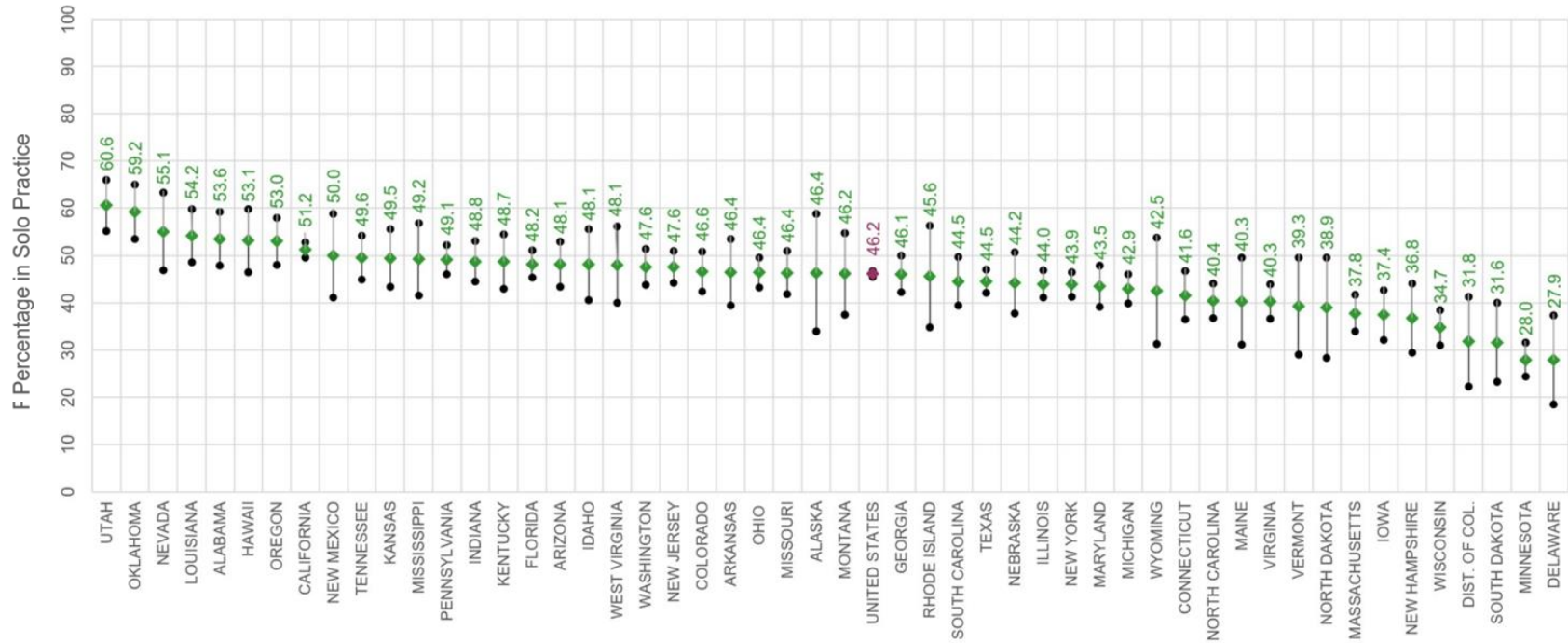
3. Innovations in Technology

4. Payment Reform

Previous HPI Data



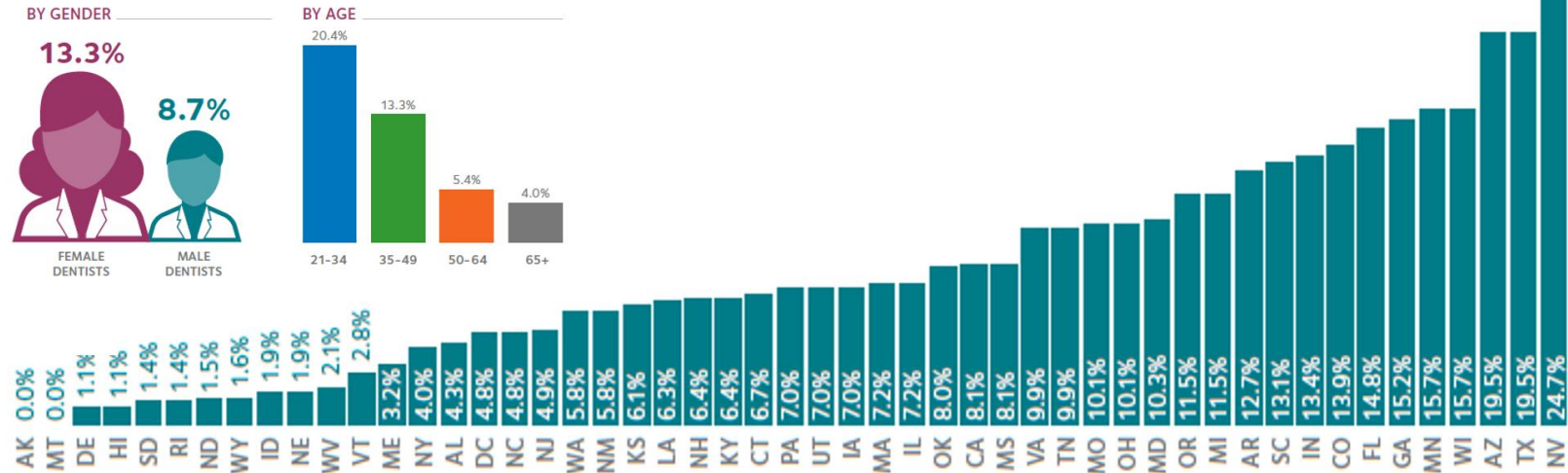
Previous HPI Data



Previous HPI Data



How Big are Dental Service Organizations?



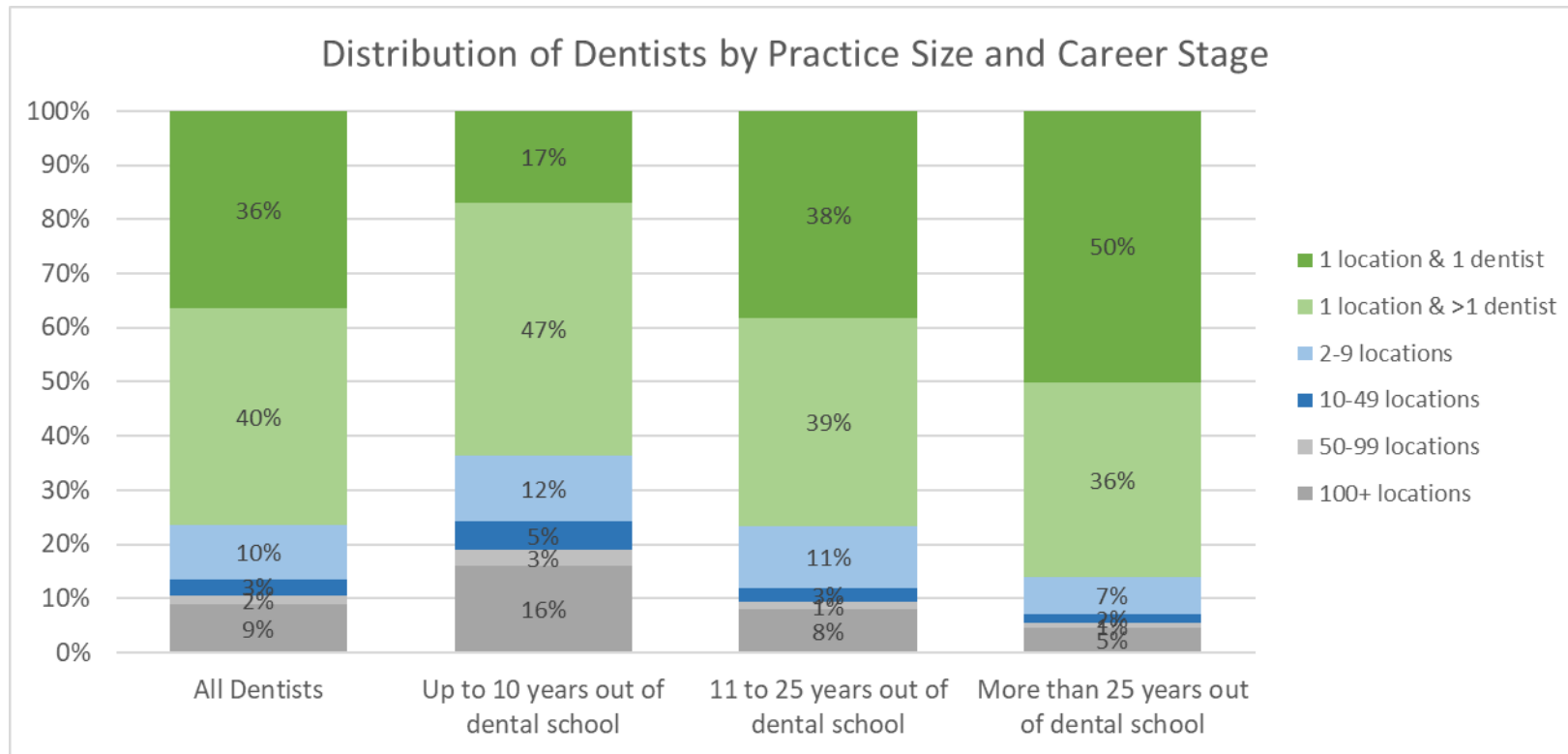
New Data for 2022!

- ***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.

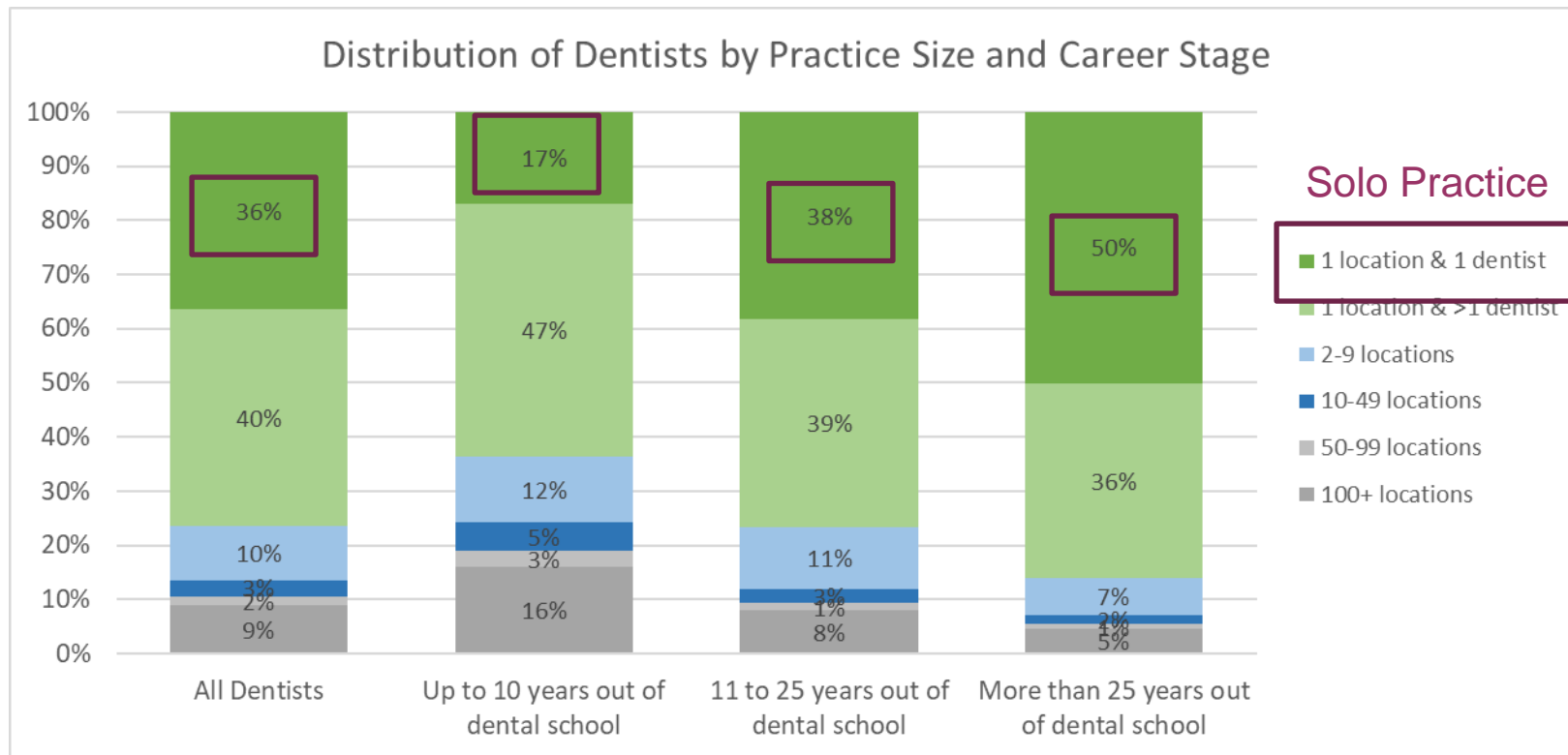
The Data

- 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.

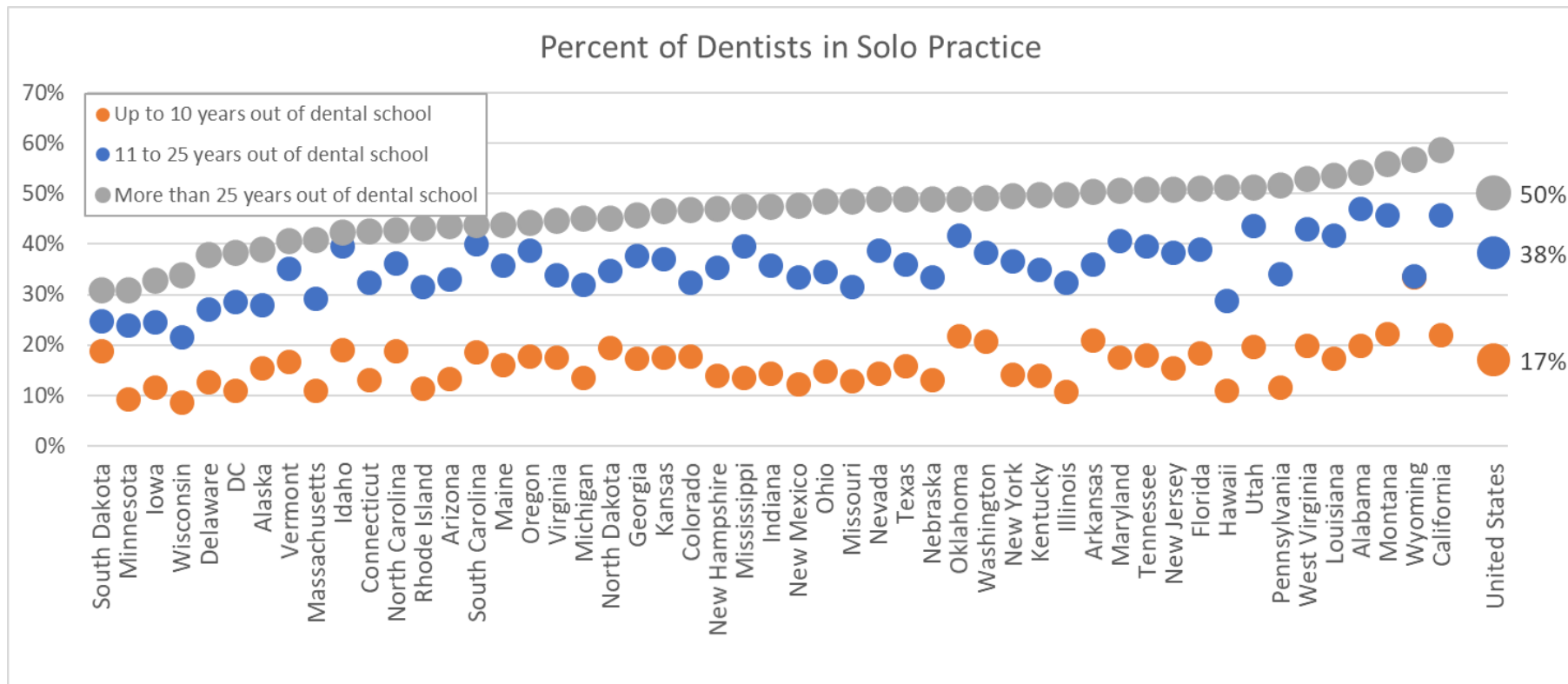
Dental Practice Size



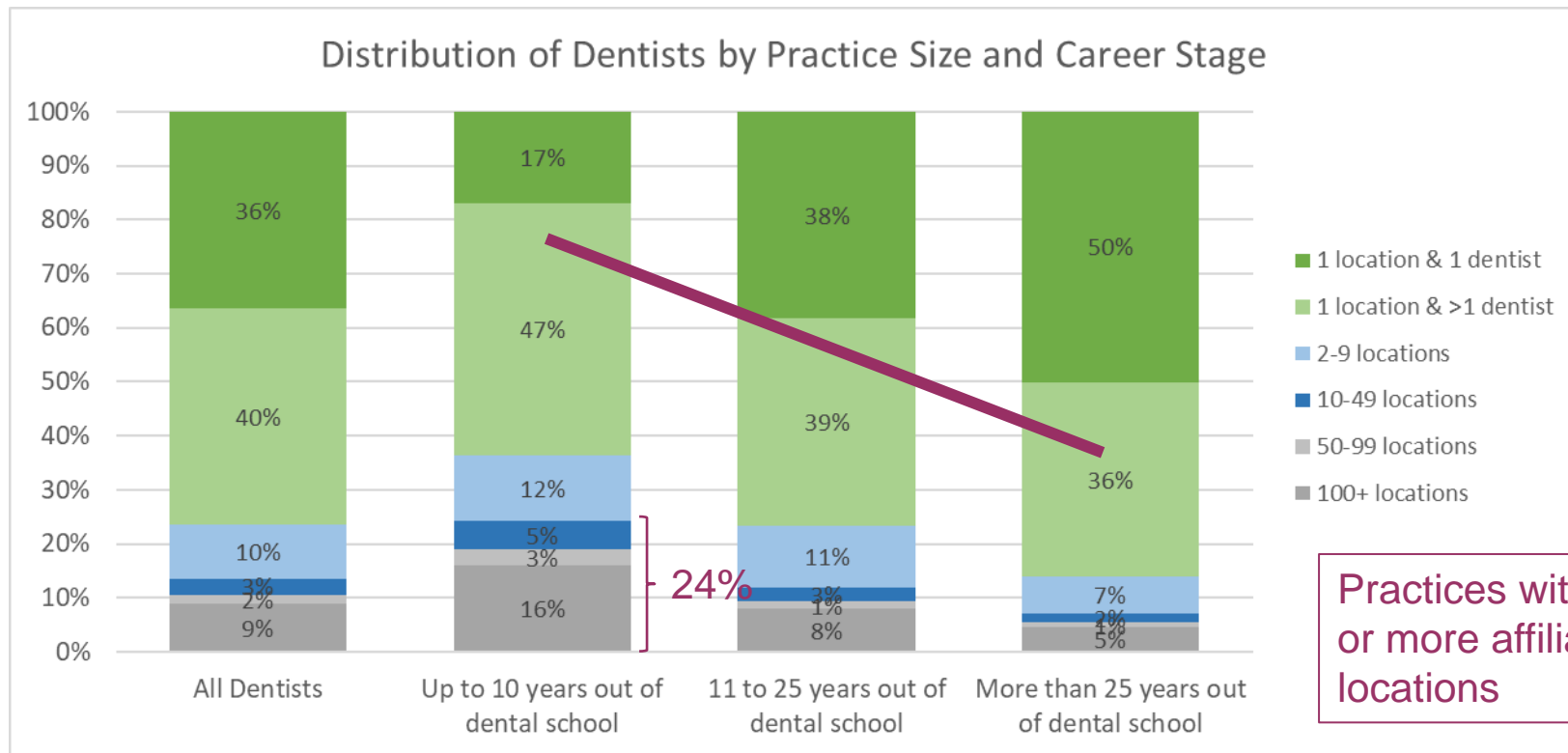
Dental Practice Size



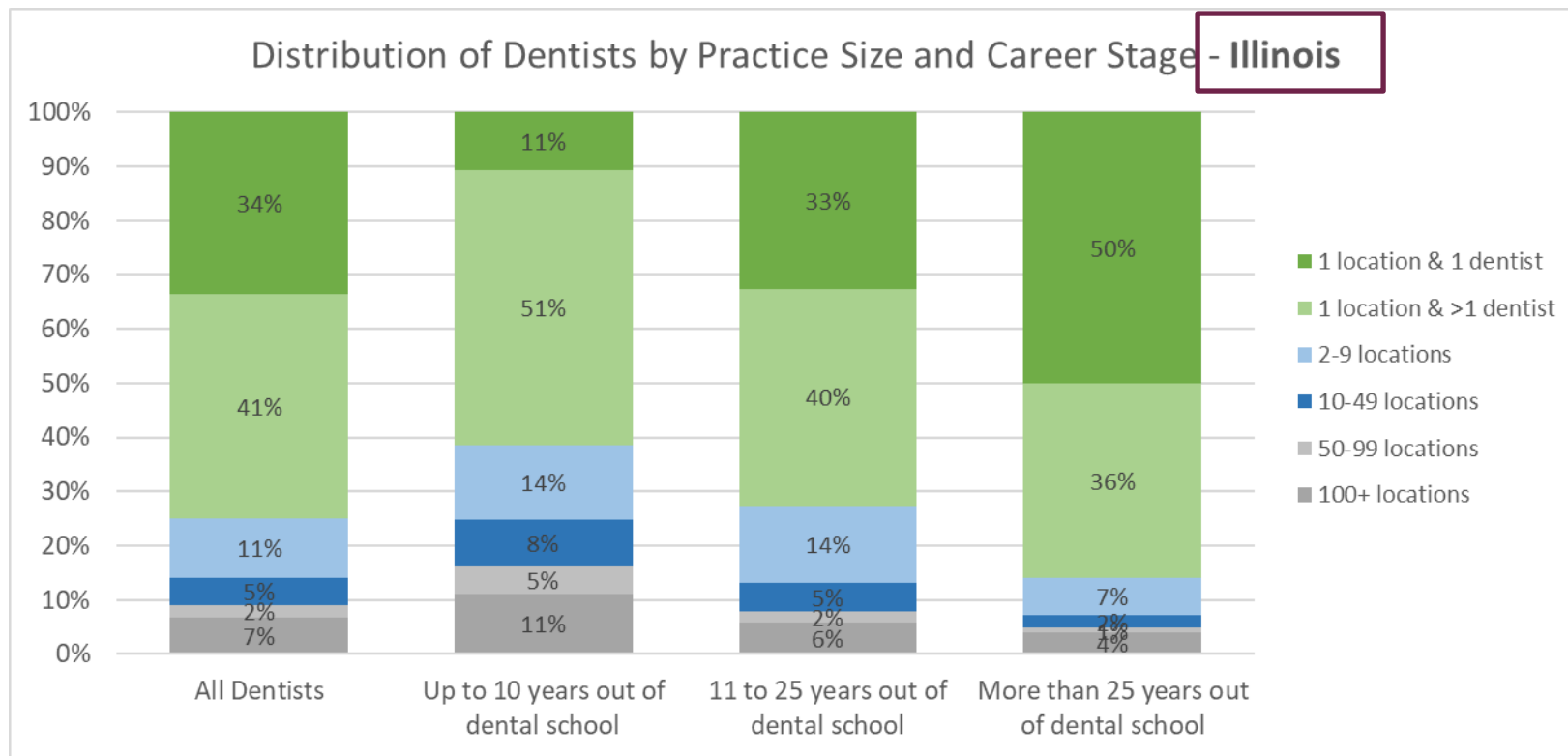
Dental Practice Size



Dental Practice Size

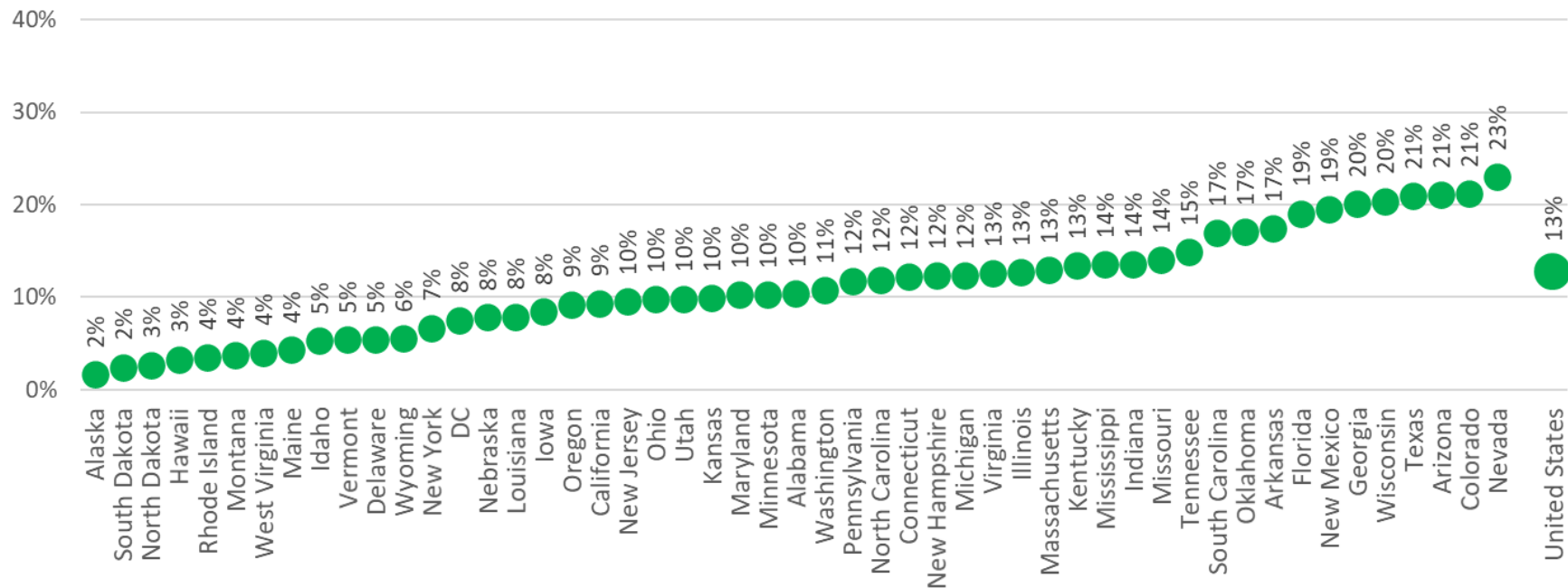


Dental Practice Size



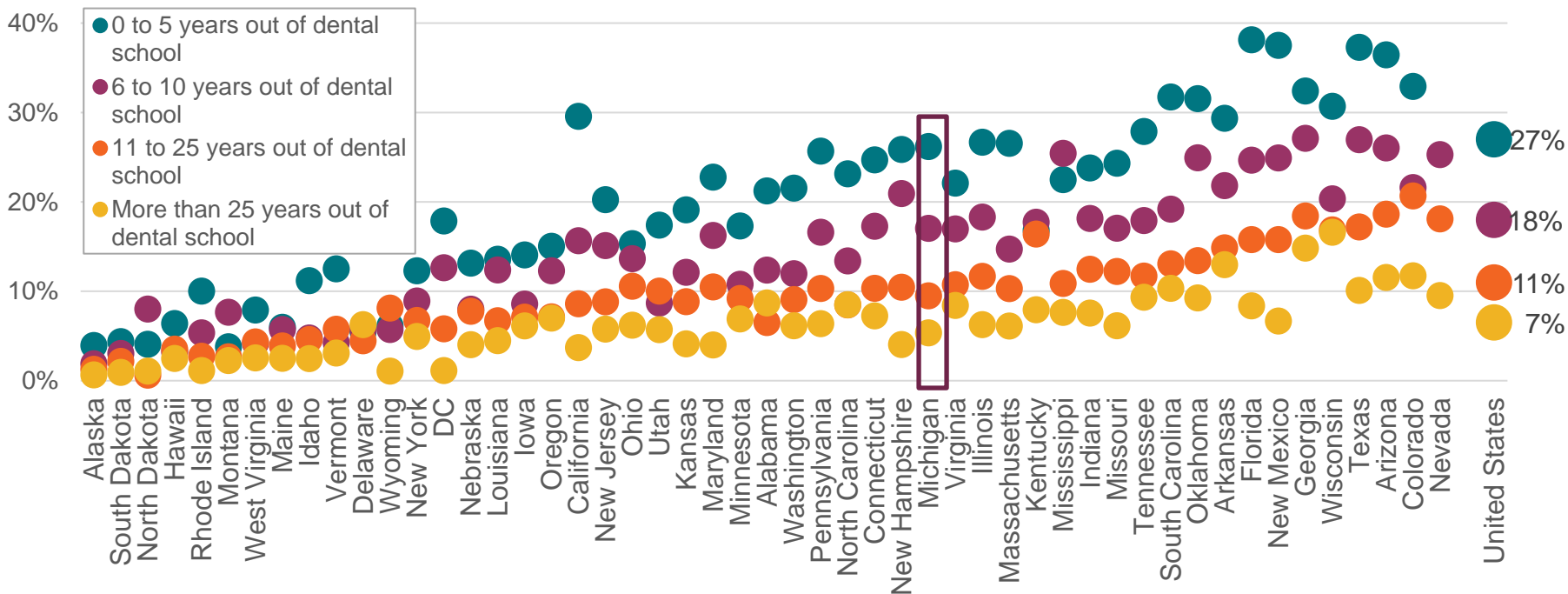
DSO Affiliation

Percent of Dentists Affiliated with a Dental Support Organization (DSO)



DSO Affiliation

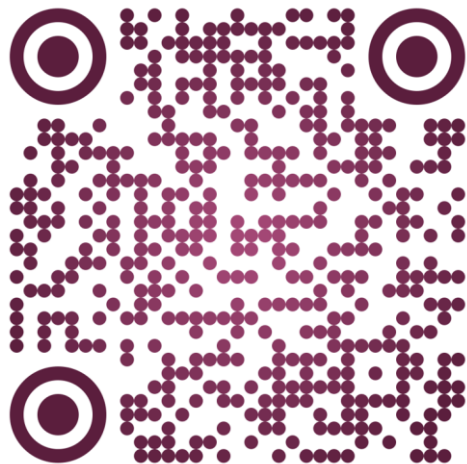
Percent of Dentists Affiliated with a Dental Support Organization (DSO)



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?

Thank You!



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