

Table of Contents

	Page
About This Study	2
Results for the questions below are reported in two sections:	
<ul style="list-style-type: none"> All Respondents Combined includes overall results for all respondents. Select Breakout of Results includes results by ownership status, DSO affiliation, practice size, geography, sex, years experience, age, & race/ethnicity. 	
	<div>All Respondents Combined</div> <div>Select Breakouts of Results</div>
Looking ahead the next 6 months, how confident are you in the economic conditions in: (Your particular dental practice, The dental care sector in general, The U.S. economy)	3 7
[Owners only] Is your practice currently accepting new patients?	3 15
[If accepting new patients] Currently, how many business days does the average new patient have to wait for an initial appointment (excluding emergencies)?	3 15
Which of the following best describes your general busyness level over the last 3 months?	4 20
Currently, or at any time during the last 3 months, have you recruited any of the following positions? (Dental hygienists, Dental assistants, Dentists, Administrative staff)	4 23
How challenging has it been to recruit the position(s) below over the last 3 months? (Dental hygienists, Dental assistants, Dentists, Administrative staff)	4 23
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?	5 42
Approximately what percentage of the patient base were in the insurance networks your practice dropped out of since the beginning of 2024?	5 49
Also looking ahead the next 6 months, what are the top 3 biggest challenges facing your dental practice?	6
Number of Responses by Wave/by Group	51

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About This Study

The survey for the second quarter of 2024 was sent June 17, 2024 to 2,451 panel members; 909 responded, for an adjusted response rate (excluding undeliverable email addresses) of 37.3%. The number of dentists in private practice who responded in each wave, along with the number of respondents in each reporting category in the current wave, can be found at the end of this report.

This report includes the results from the latest wave for dentists working in private dental practices. Results are reported for all respondents and by ownership status, DSO affiliation, practice size, geographic location, sex, age group, and race/ethnicity. Unless noted otherwise, charts reflect the results from the latest wave of data collection.

Please note that we only include graphics representing at least 30 responses. Because of this, we were not able to include results for respondents in the following categories: under age 35, large group (10+ dentists) and Black. The number of respondents by demographics can be found at the end of this report.

What's New in 2024 - Revised Core Questions

To ensure HPI continues to track the most relevant indicators to measure the state of the economy in dental practices, and in response to feedback from panelists and report users, HPI has made some modifications to the questions starting Q1 2024.

A new question was added to gauge capacity of dental practices, *"Which of the following best describes your general busyness level over the last 3 months?"* Answer options are *"Too busy to treat all people requesting appointments," "Provided care to all who requested appointments but was overworked," "Provided care to all who requested appointments but was not overworked,"* and *"Not busy enough, could have treated more patients."* This new question replaces the previous questions that asked panelists to indicate how full their practice schedule was and the follow-up question asking reasons for not reaching full capacity.

To simplify data collection while keeping focus on the most useful indicators, the survey continues to ask about the average wait time for a new patient but now excludes the question about wait times for patients of record.

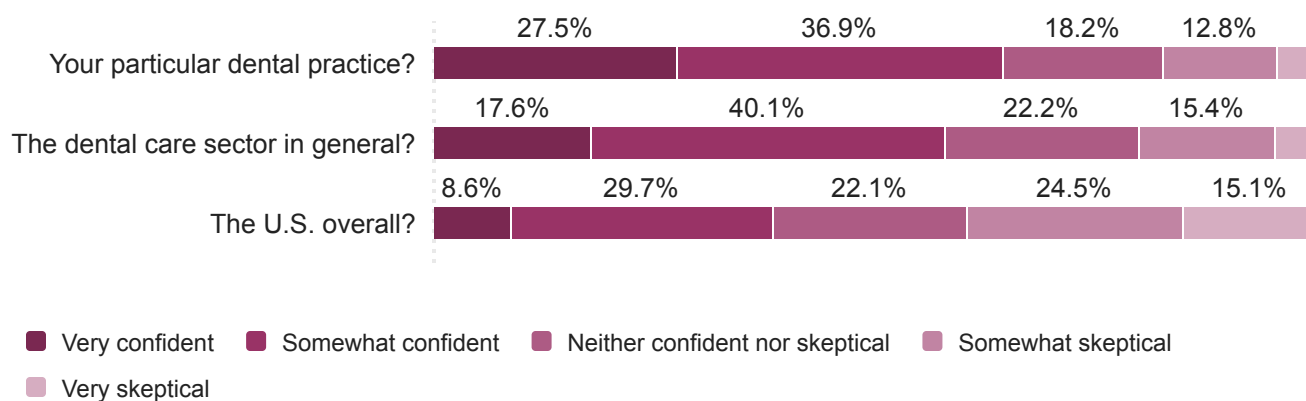
Lastly, the following edits were made to reflect the updated cadence of this poll and in response to panelists' feedback:

- "Looking ahead the next 6 months, how confident are you in the recovery of..." is now "Looking ahead the next 6 months, how confident are you in the economic conditions in..."
- "Have you recently or are you currently recruiting any of the following positions in your dental practice?" is now "Currently, or at any time during the last 3 months, have you recruited any of the following positions?"
- "How challenging has it been to recruit the position(s) below?" is now "How challenging has it been to recruit the position(s) below over the last 3 months?"

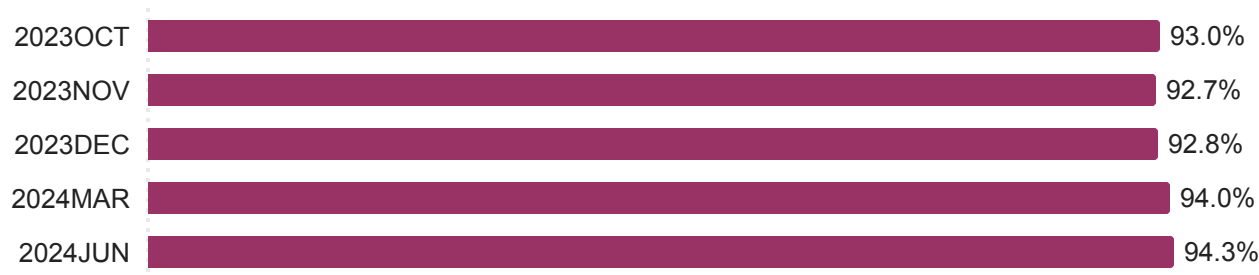
All Respondents

Looking ahead the next 6 months, how confident are you in the economic conditions in:

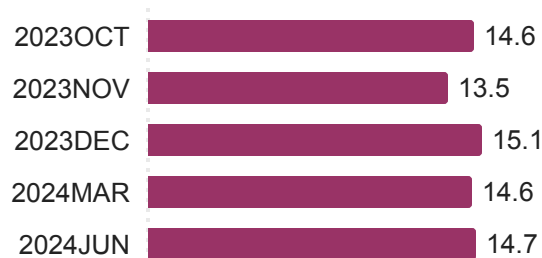
852 Responses



Is your practice currently accepting new patients? (Percentage selecting "yes")



[If accepting new patients] Currently, how many business days does the average new patient have to wait for an initial appointment (excluding emergencies)?



■ Average number of days

Which of the following best describes your general busyness level over the last 3 months?

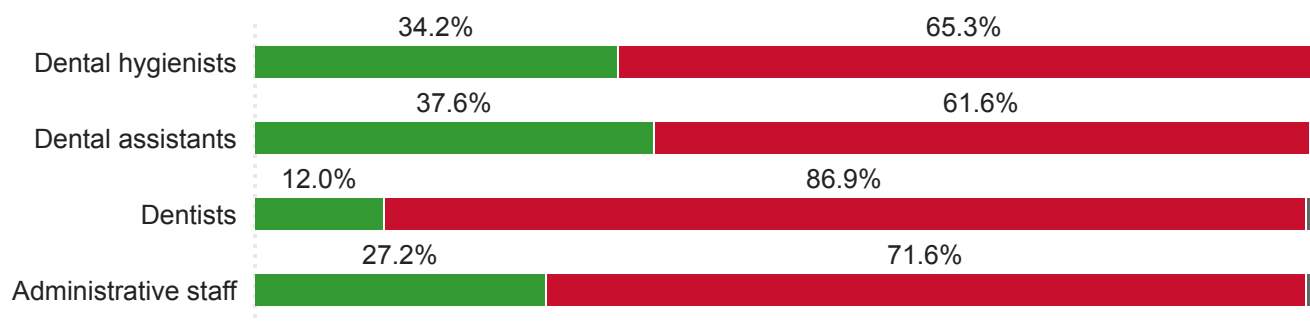
852 Responses



- Too busy to treat all people requesting appointments
- Provided care to all who requested appointments but was overworked
- Provided care to all who requested appointments but was not overworked
- Not busy enough, could have treated more patients

Currently, or at any time during the last 3 months, have you recruited any of the following positions?

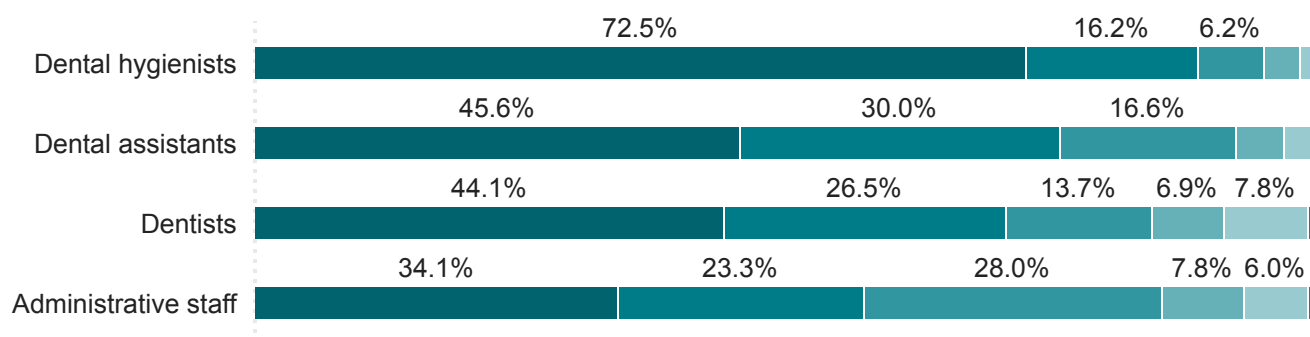
852 Responses



■ Yes ■ No ■ Not sure

How challenging has it been to recruit the position(s) below over the last 3 months?

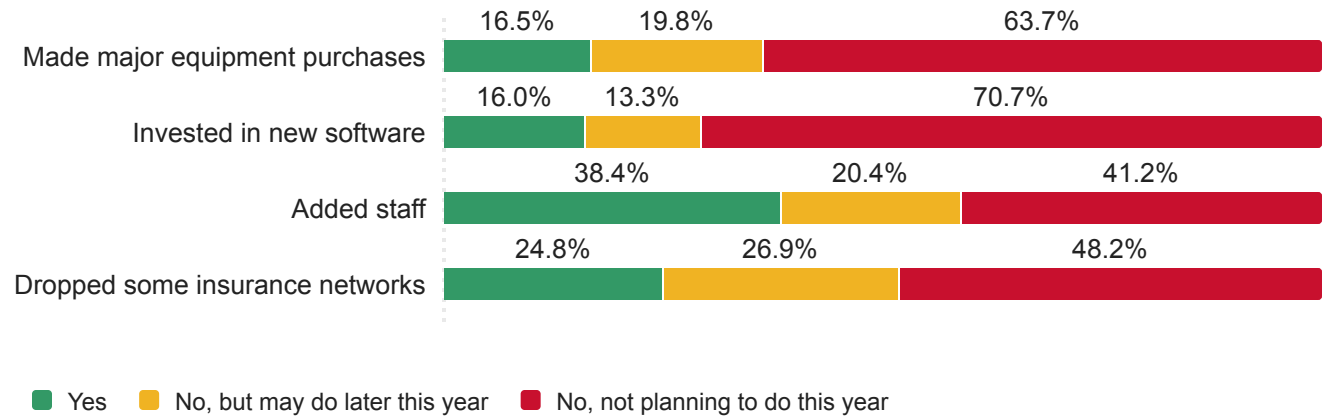
516 Responses



■ Extremely challenging ■ Very challenging ■ Moderately challenging ■ Slightly challenging
■ Not challenging at all ■ Not sure/Not applicable

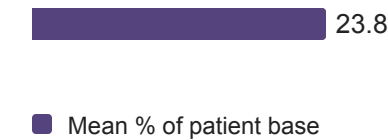
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

769 Responses



Approximately what percentage of the patient base were in the insurance networks your practice dropped out of since the beginning of 2024?

167 Responses



Also looking ahead the next 6 months, what are the top 3 biggest challenges facing your dental practice?

798 Responses

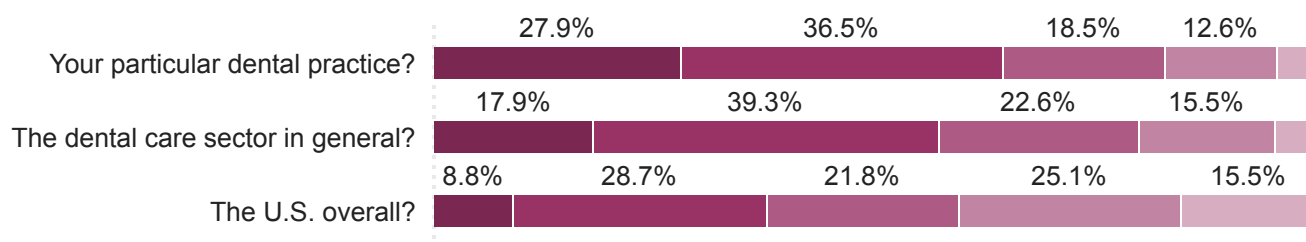
Field	Percentage of Responses
WORKFORCE ISSUES (HIRING / RECRUITING / TRAINING / RETAINING STAFF)	63.2%
INSURANCE REIMBURSEMENT, DELAYED/DENIED PAYMENT	49.2%
INCREASING OVERHEAD / EXPENSES (SUPPLIES, EQUIPMENT, RENT)	36.1%
INCREASING COST OF STAFF SALARY / BENEFITS	14.2%
INFLATION / ECONOMY	13.7%
CANCELLED / BROKEN APPOINTMENTS / KEEPING SCHEDULE FULL	13.7%
SUSTAINING / INCREASING PATIENT VOLUME	12.7%
PATIENTS AFFORDING / ACCEPTING TREATMENT PLANS	9.3%
MEETING HIGH DEMAND FOR CARE / LIMITED CAPACITY	7.9%
STAFF WELL-BEING / MORALE / BURNOUT	6.8%
REVENUE / CASH FLOW / FUNDING TO OPERATE	5.5%
EXPANDING / SELLING / TRANSITION TO RETIREMENT	5.4%
KEEPING UP WITH TECHNOLOGY / CLINICAL RESEARCH	5.3%
COMPETITION WITH OTHER DENTISTS / LARGE GROUPS / DSO	3.4%
GOVERNMENT OVERSIGHT / RULES AND REGULATIONS	3.3%
DROPPING INSURANCE PLANS / FUNCTIONING OUT-OF-NETWORK	2.9%
INCREASING LAB COSTS / DIFFICULTY ACCESSING LABS	1.5%
BUSINESS / TEAM MANAGEMENT	1.5%
POLITICAL CONCERNS	1.3%
MISCELLANEOUS	6.3%

Economic Confidence

BY OWNERSHIP STATUS

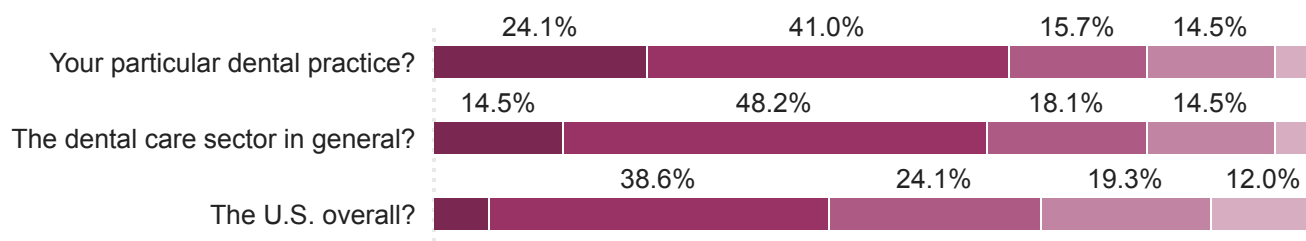
Looking ahead the next 6 months, how confident are you in the economic conditions in:

Owner



■ Very confident
 ■ Somewhat confident
 ■ Neither confident nor skeptical
 ■ Somewhat skeptical
 ■ Very skeptical

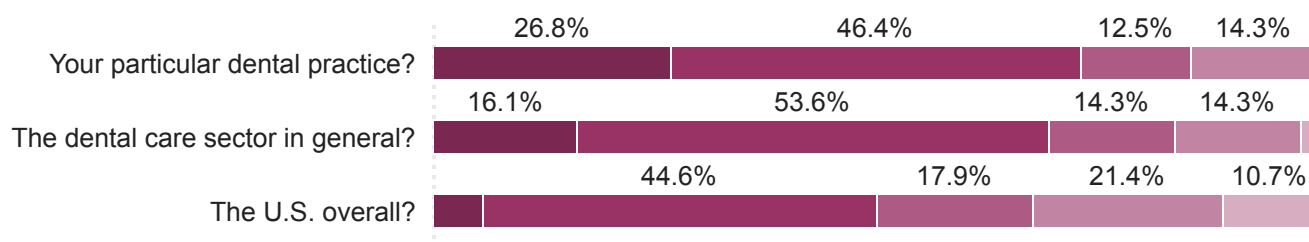
Non-owner



BY DSO AFFILIATION

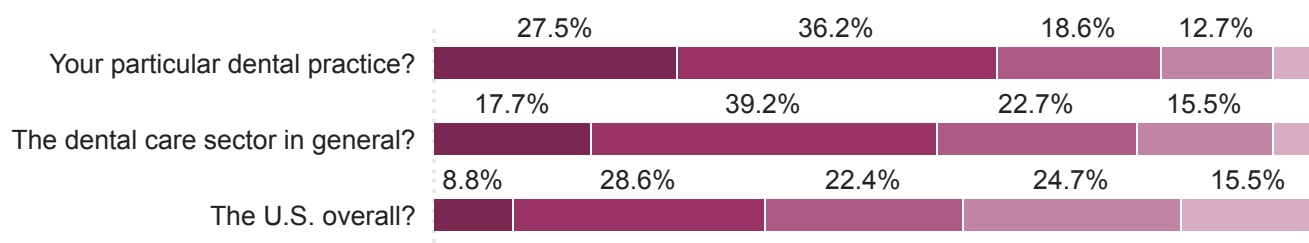
Looking ahead the next 6 months, how confident are you in the economic conditions in:

DSO



■ Very confident
 ■ Somewhat confident
 ■ Neither confident nor skeptical
 ■ Somewhat skeptical
 ■ Very skeptical

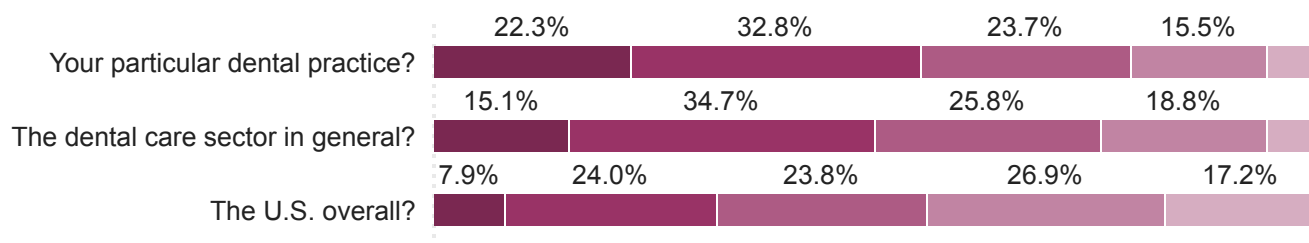
Non-DSO



BY PRACTICE SIZE

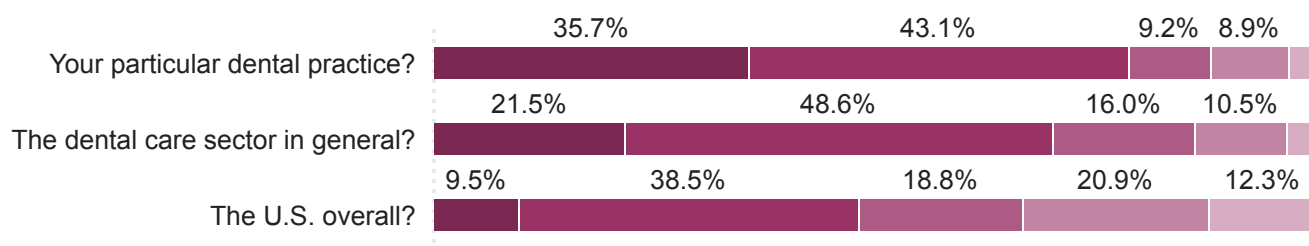
Looking ahead the next 6 months, how confident are you in the economic conditions in:

Solo dentists



Very confident
 Somewhat confident
 Neither confident nor skeptical
 Somewhat skeptical
 Very skeptical

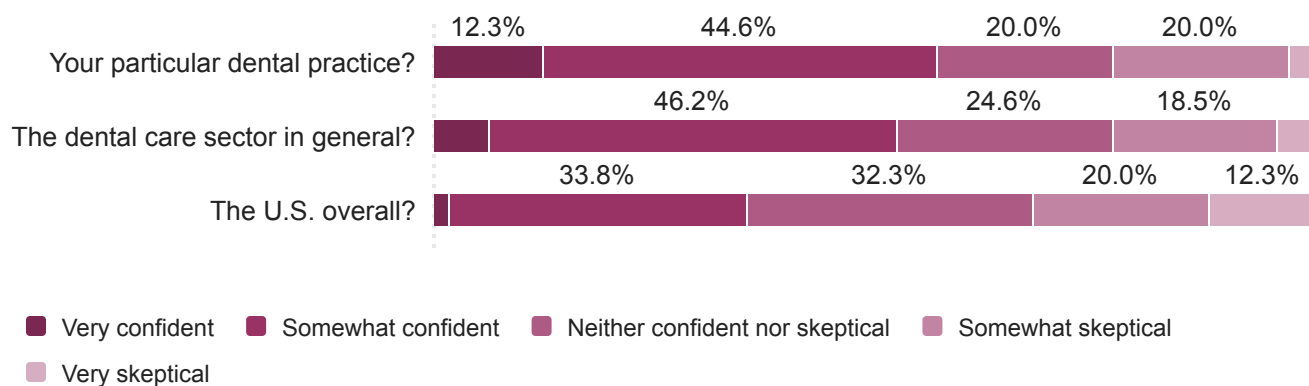
2 to 9 dentists



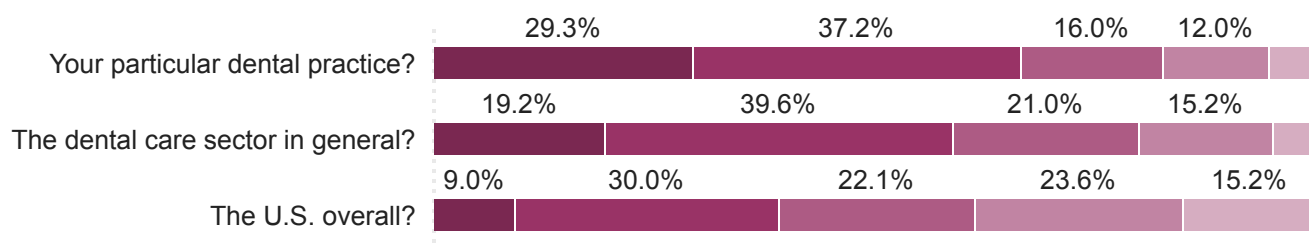
BY GEOGRAPHY

Looking ahead the next 6 months, how confident are you in the economic conditions in:

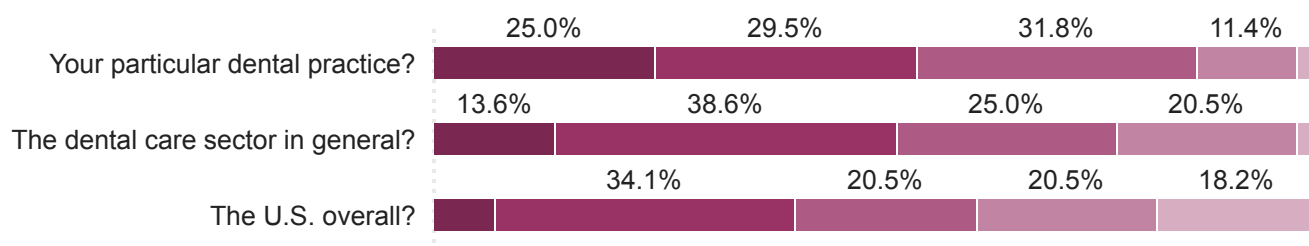
Top 20 cities



Other urban

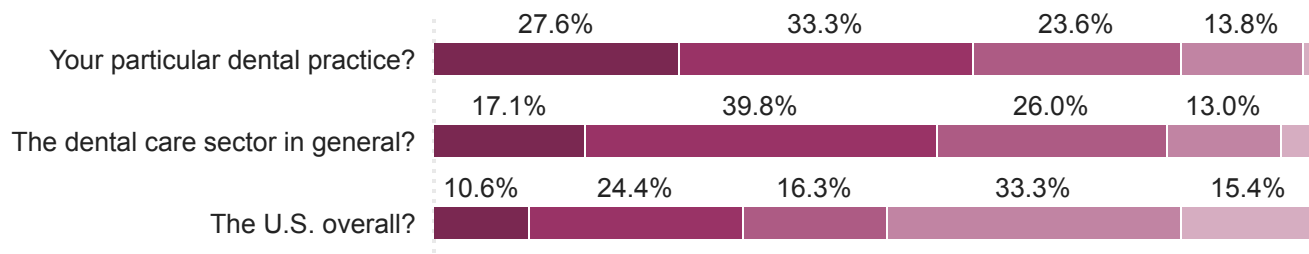


Suburban



Looking ahead the next 6 months, how confident are you in the economic conditions in:
(continued)

Rural

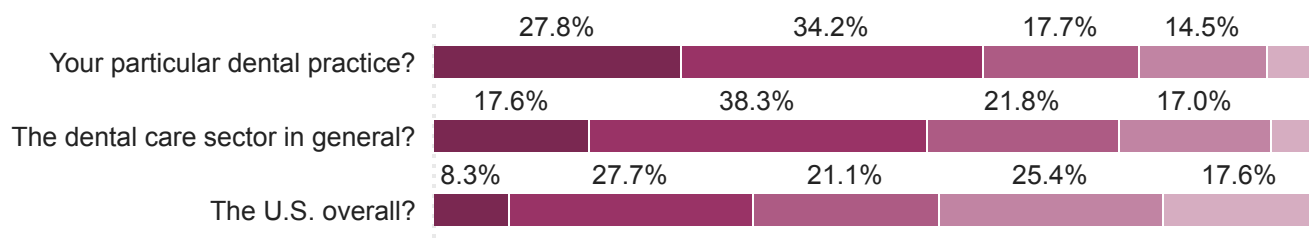


Very confident
 Somewhat confident
 Neither confident nor skeptical
 Somewhat skeptical
 Very skeptical

BY SEX

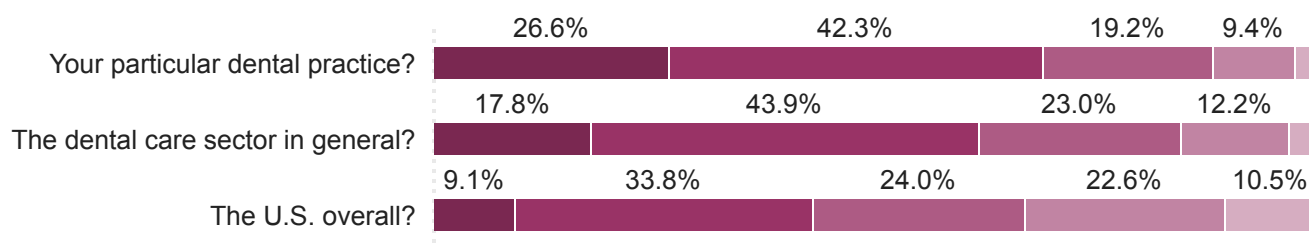
Looking ahead the next 6 months, how confident are you in the economic conditions in:

Male



Very confident
 Somewhat confident
 Neither confident nor skeptical
 Somewhat skeptical
 Very skeptical

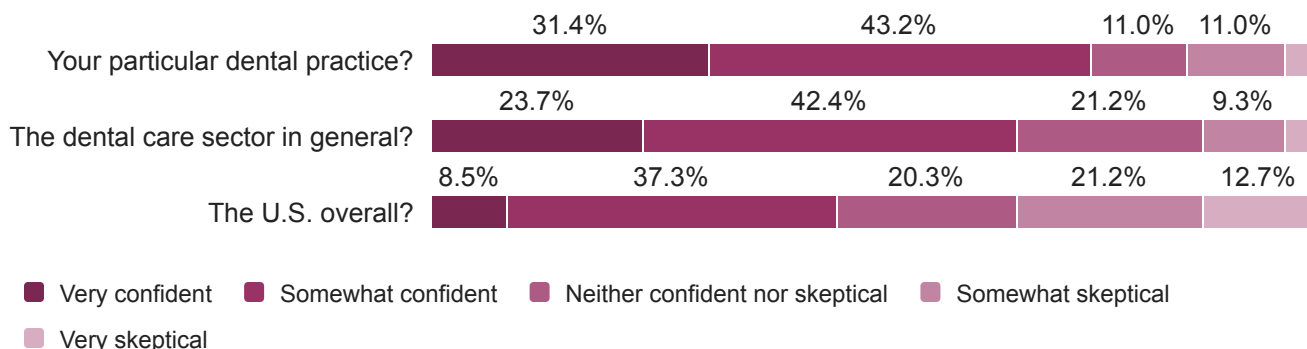
Female



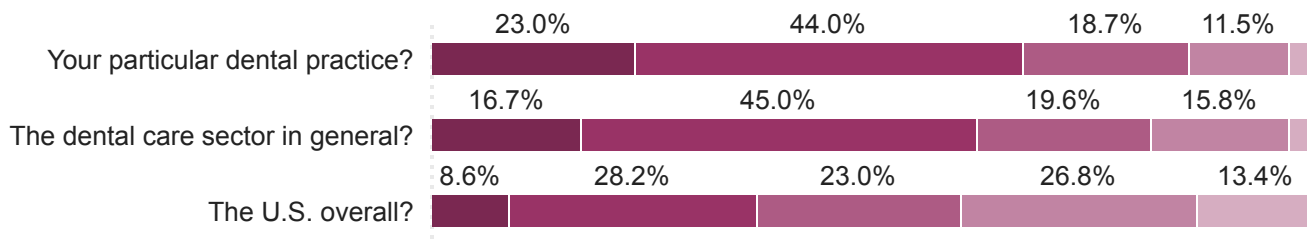
BY AGE GROUP

Looking ahead the next 6 months, how confident are you in the economic conditions in:

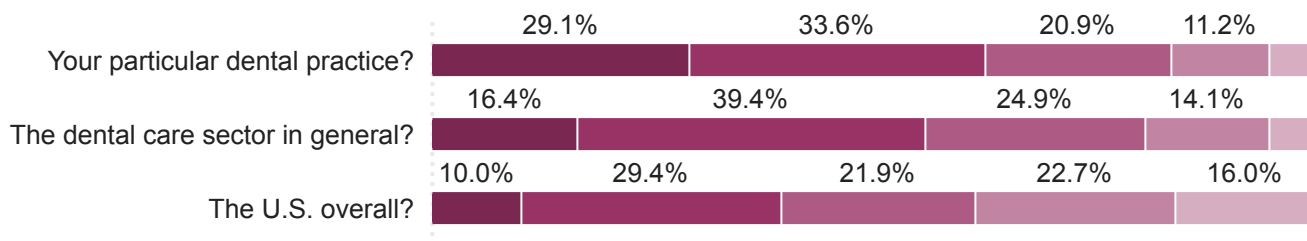
35 to 44



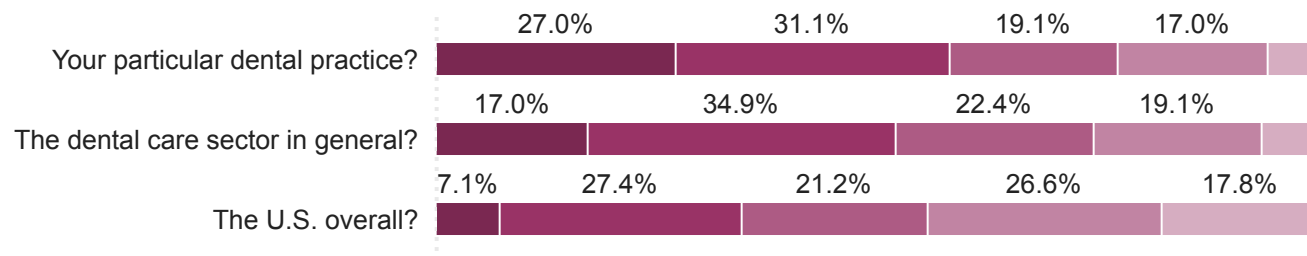
45 to 54



55 to 64



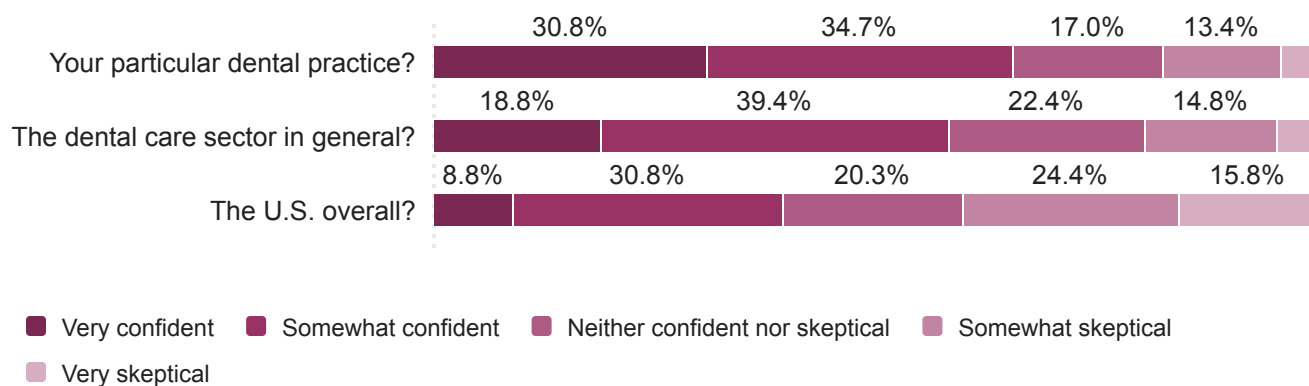
65 or older



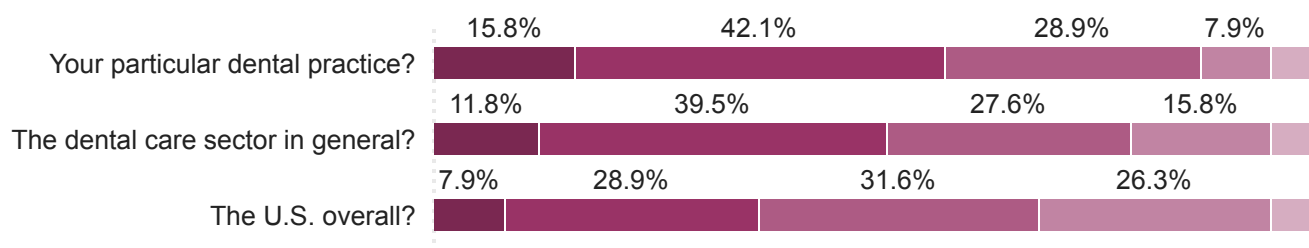
BY RACE/ETHNICITY

Looking ahead the next 6 months, how confident are you in the economic conditions in:

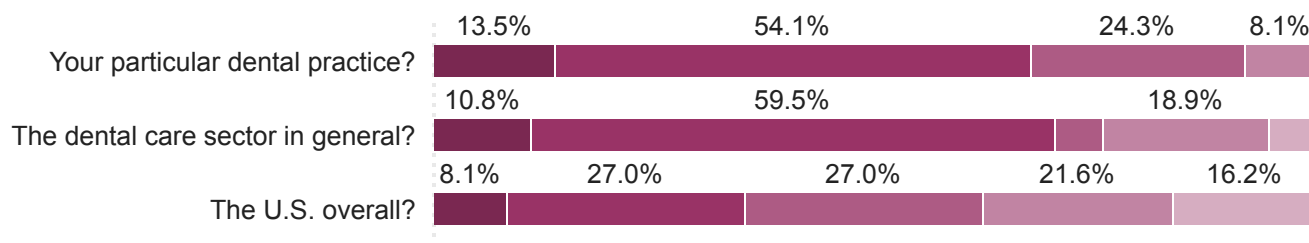
White



Asian



Hispanic



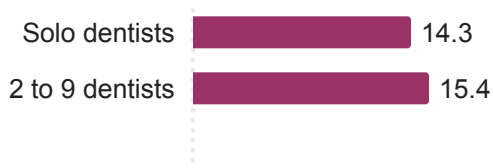
Patient Wait Times

BY PRACTICE SIZE

**[Owners only] Is your practice currently accepting new patients?
(Percentage selecting "yes")**



Currently, how many business days does the average new patient have to wait for an initial appointment (excluding emergencies)?

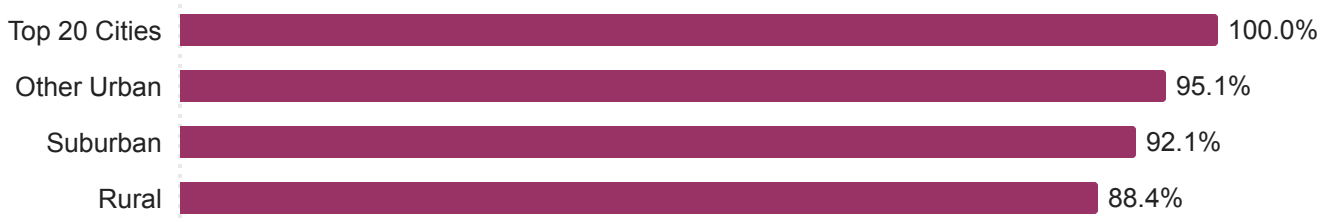


■ Mean number of days

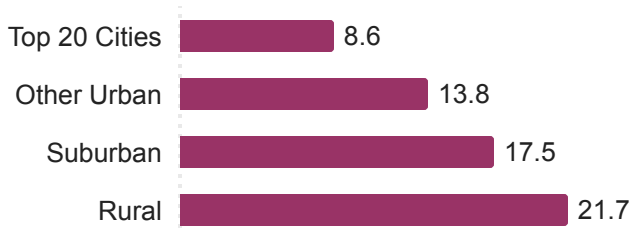
BY GEOGRAPHY

[Owners only] Is your practice currently accepting new patients?

(Percentage selecting "yes")



Currently, how many business days does the average new patient have to wait for an initial appointment (excluding emergencies)?



■ Average number of days

BY SEX

[Owners only] Is your practice currently accepting new patients?

(Percentage selecting "yes")



Currently, how many business days does the average new patient have to wait for an initial appointment (excluding emergencies)?

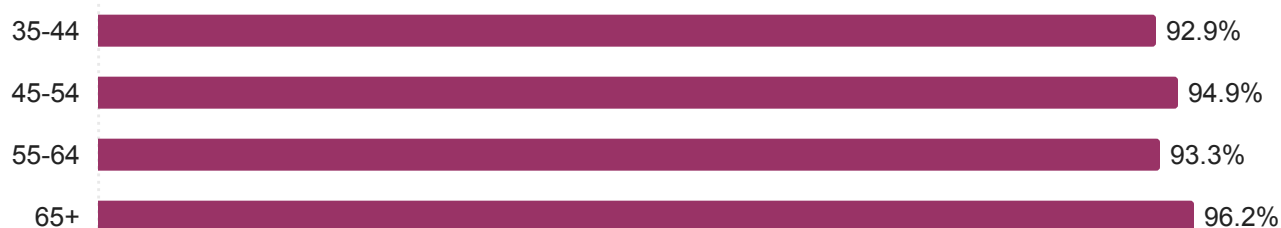


■ Mean number of days

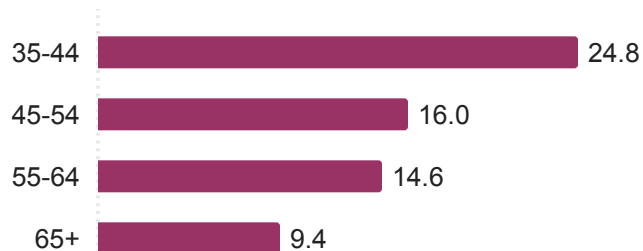
BY AGE GROUP

[Owners only] Is your practice currently accepting new patients?

(Percentage selecting "yes")



Currently, how many business days does the average new patient have to wait for an initial appointment (excluding emergencies)?



■ Average number of days

BY RACE / ETHNICITY

[Owners only] Is your practice currently accepting new patients?

(Percentage selecting "yes")



Currently, how many business days does the average new patient have to wait for an initial appointment (excluding emergencies)?



■ Average number of days

Busyness

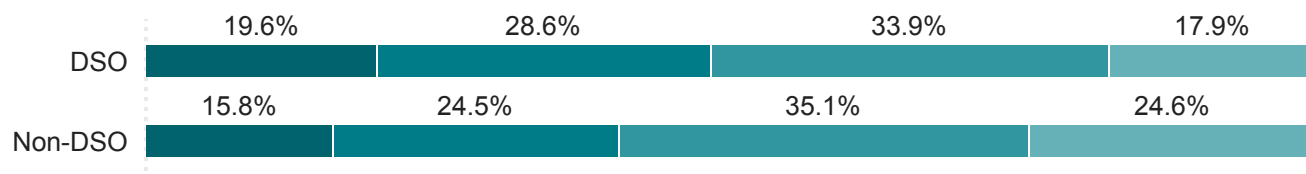
Which of the following best describes your general busyness level over the last 3 months?

BY OWNERSHIP STATUS

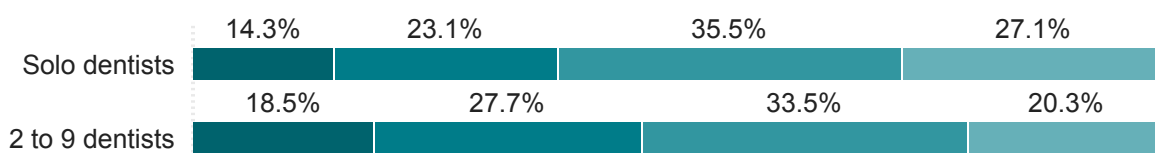


- Too busy to treat all people requesting appointments
- Provided care to all who requested appointments but was overworked
- Provided care to all who requested appointments but was not overworked
- Not busy enough, could have treated more patients

BY DSO AFFILIATION

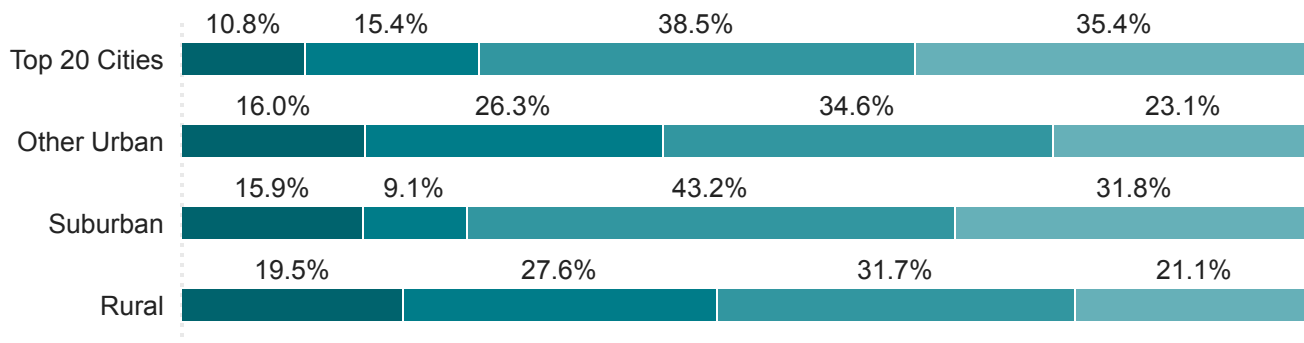


BY PRACTICE SIZE



Which of the following best describes your general busyness level over the last 3 months? (continued)

BY GEOGRAPHY

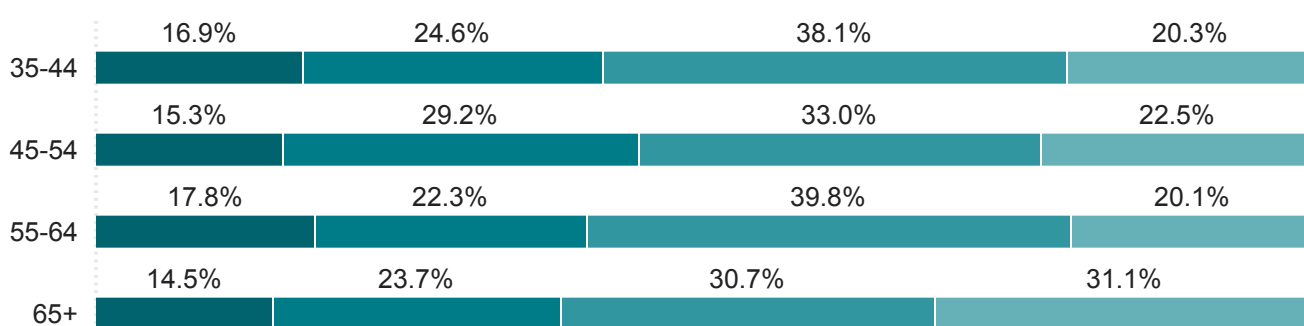


- Too busy to treat all people requesting appointments
- Provided care to all who requested appointments but was overworked
- Provided care to all who requested appointments but was not overworked
- Not busy enough, could have treated more patients

BY GENDER



BY AGE GROUP



Which of the following best describes your general busyness level over the last 3 months? (continued)

BY RACE/ETHNICITY



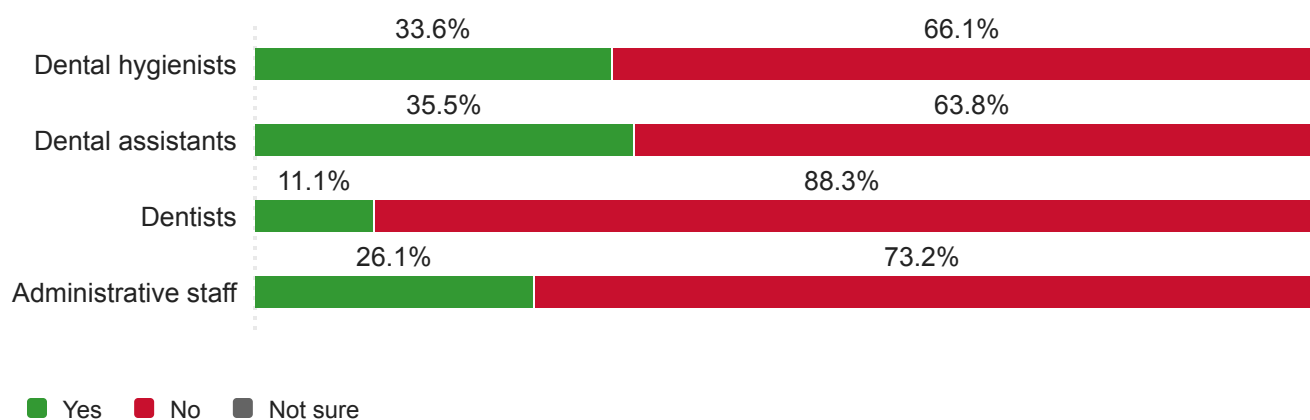
- Too busy to treat all people requesting appointments
- Provided care to all who requested appointments but was overworked
- Provided care to all who requested appointments but was not overworked
- Not busy enough, could have treated more patients

Staff Recruitment

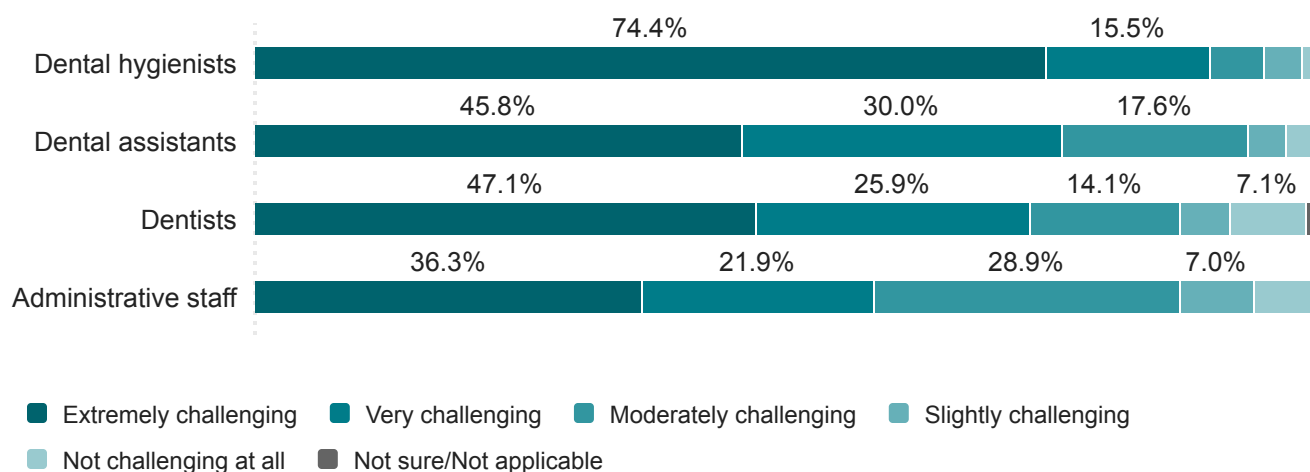
BY OWNERSHIP STATUS

Owner dentists

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



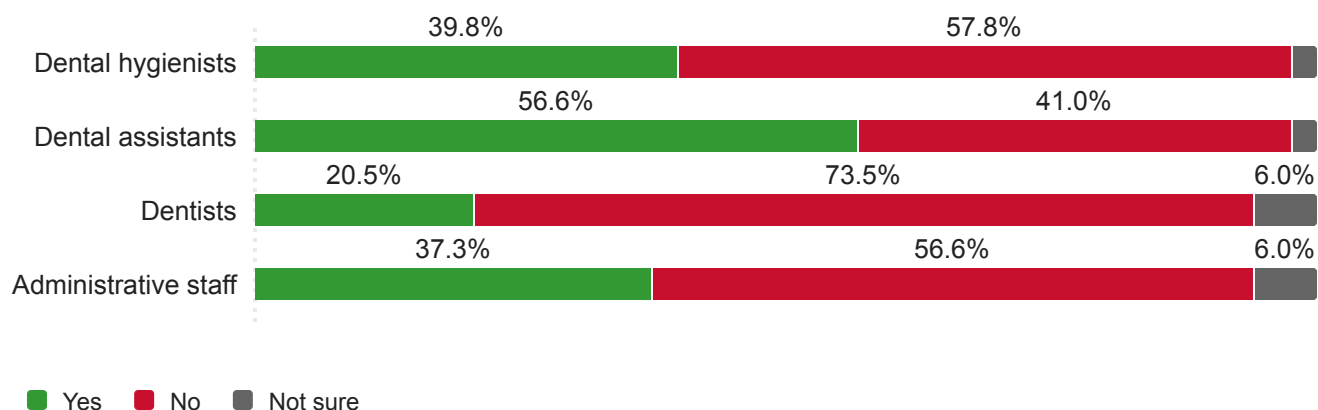
How challenging has it been to recruit the position(s) below over the last 3 months?



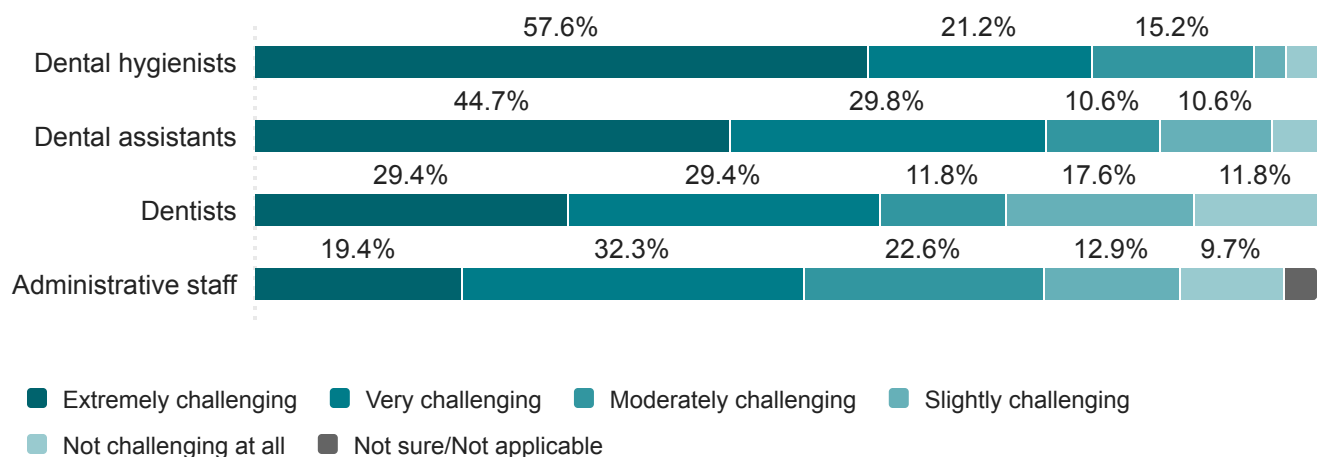
BY OWNERSHIP STATUS (continued)

Non-owner dentists

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



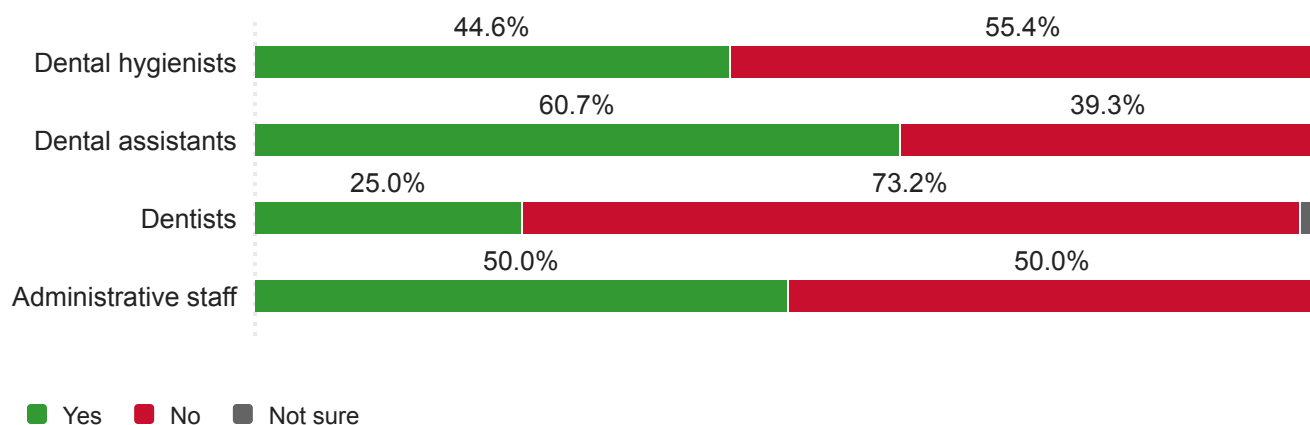
How challenging has it been to recruit the position(s) below over the last 3 months?



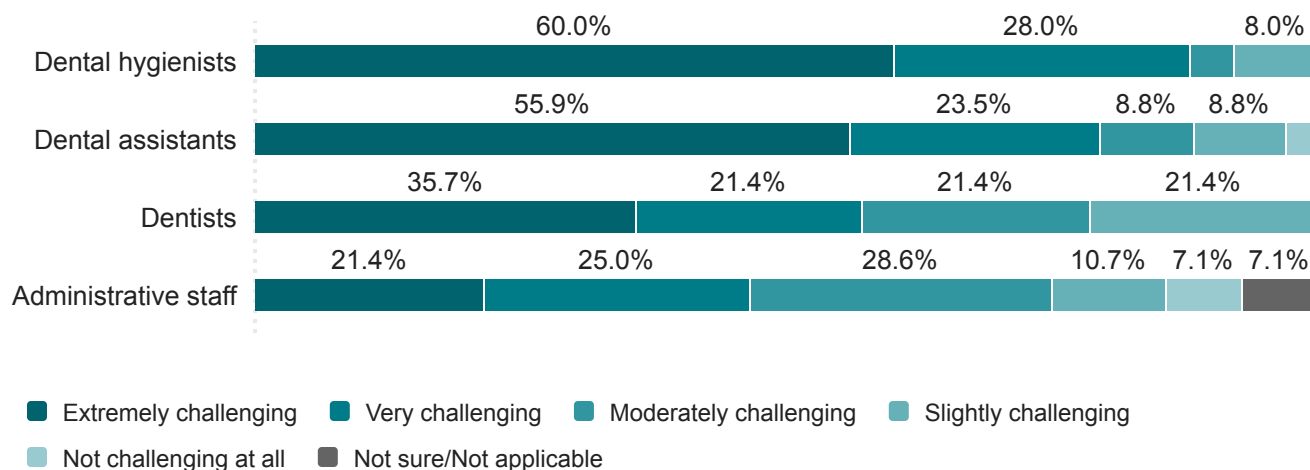
BY DSO AFFILIATION

DSO

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



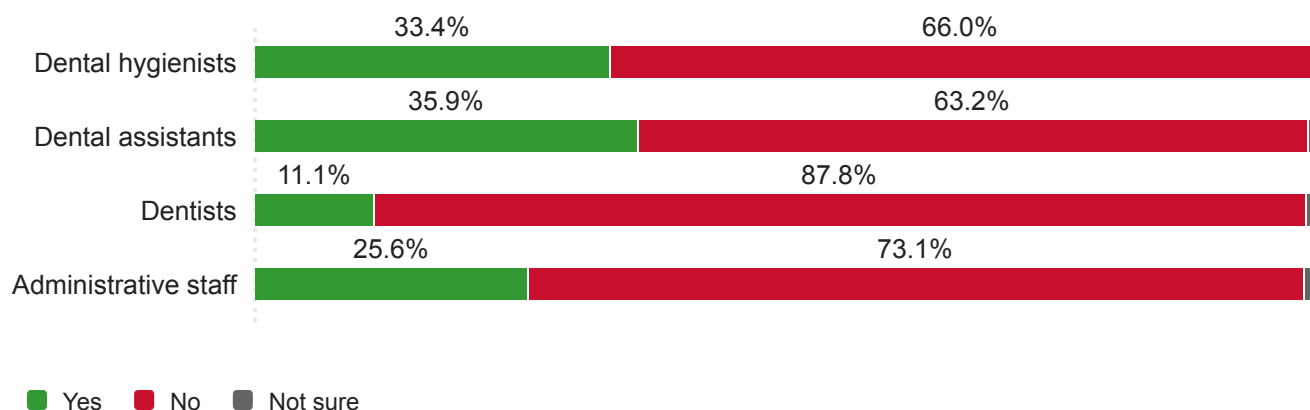
How challenging has it been to recruit the position(s) below over the last 3 months?



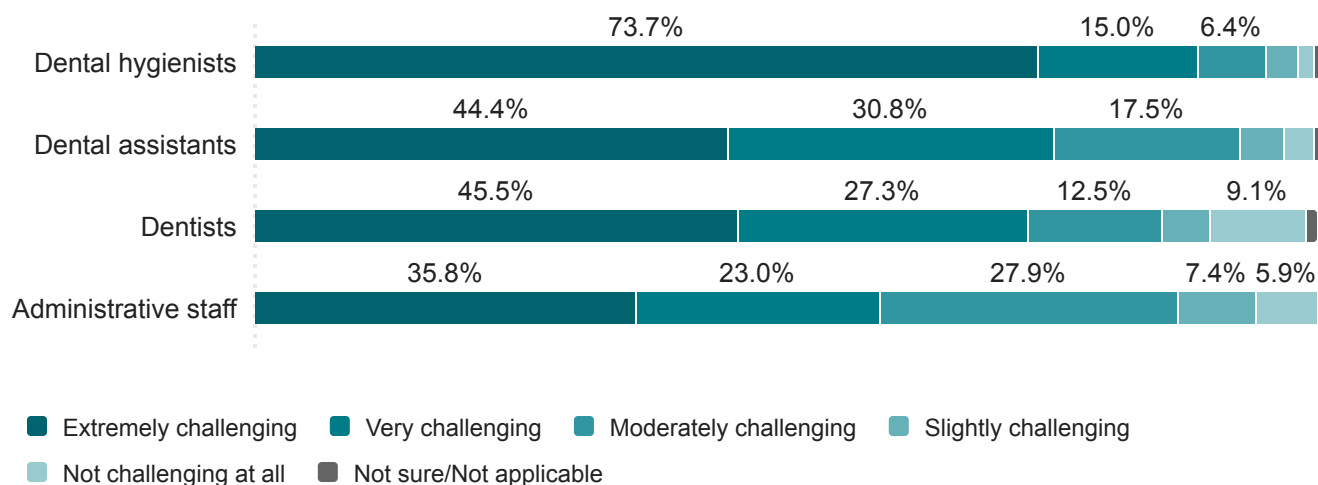
BY DSO AFFILIATION (continued)

Non-DSO

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



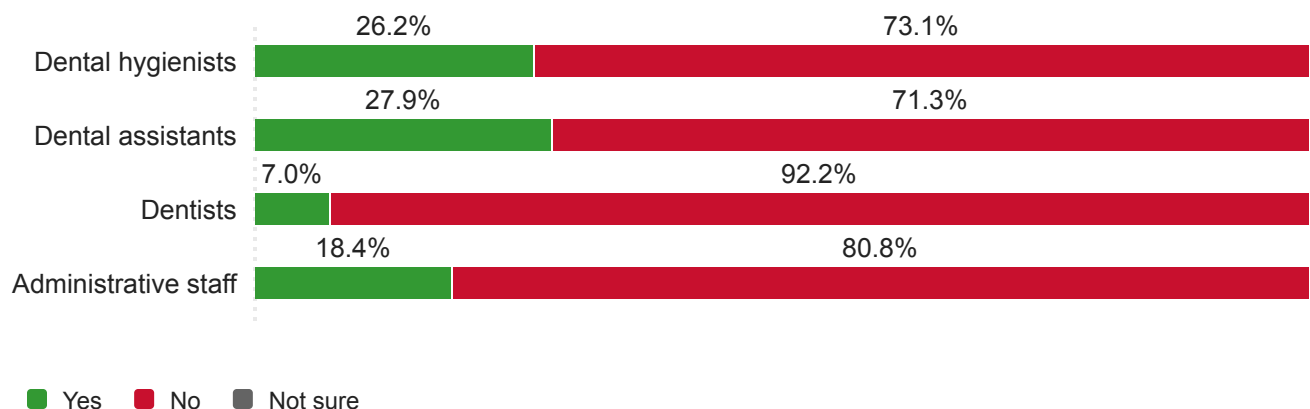
How challenging has it been to recruit the position(s) below over the last 3 months?



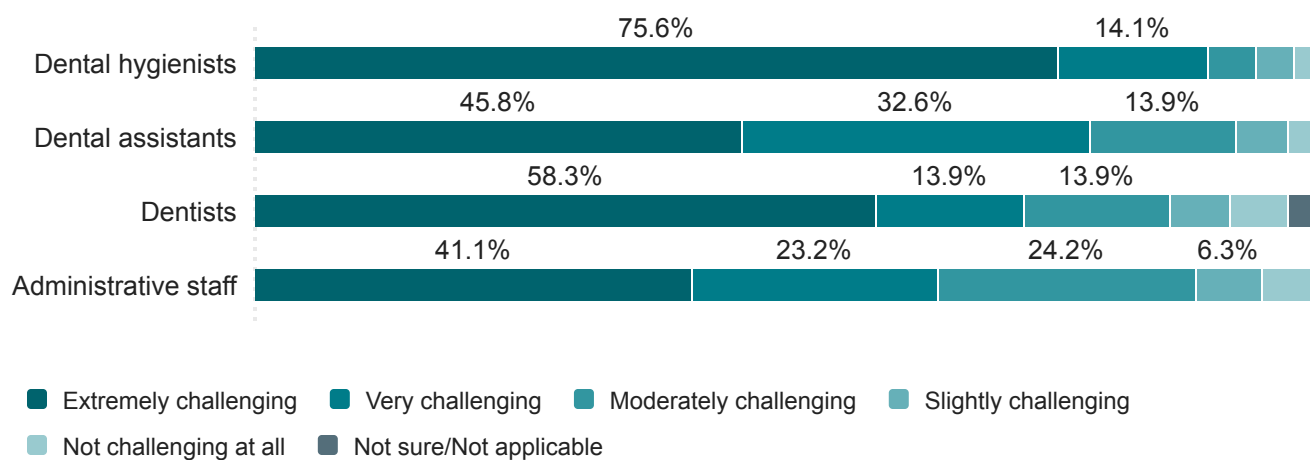
BY PRACTICE SIZE

Solo dentists

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



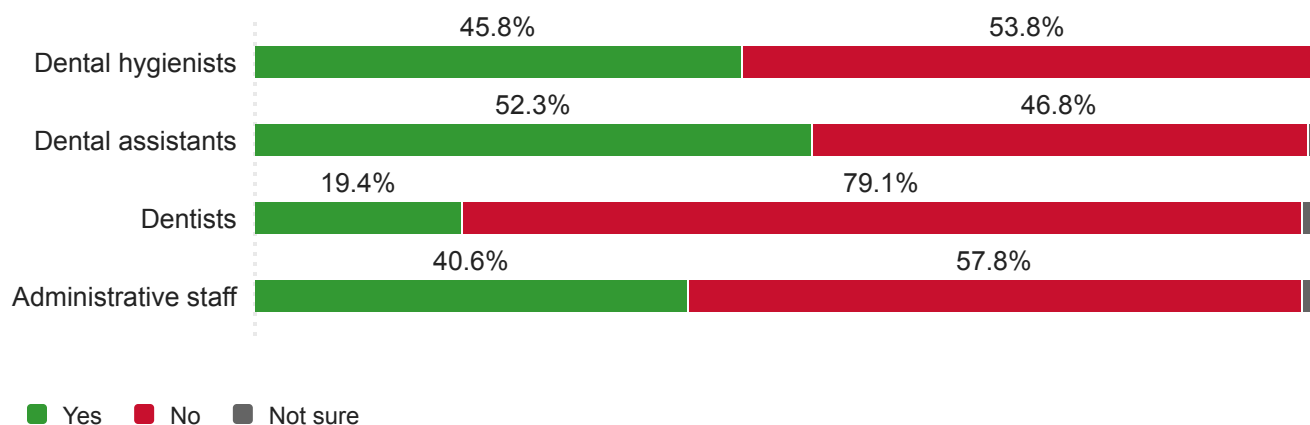
How challenging has it been to recruit the position(s) below over the last 3 months?



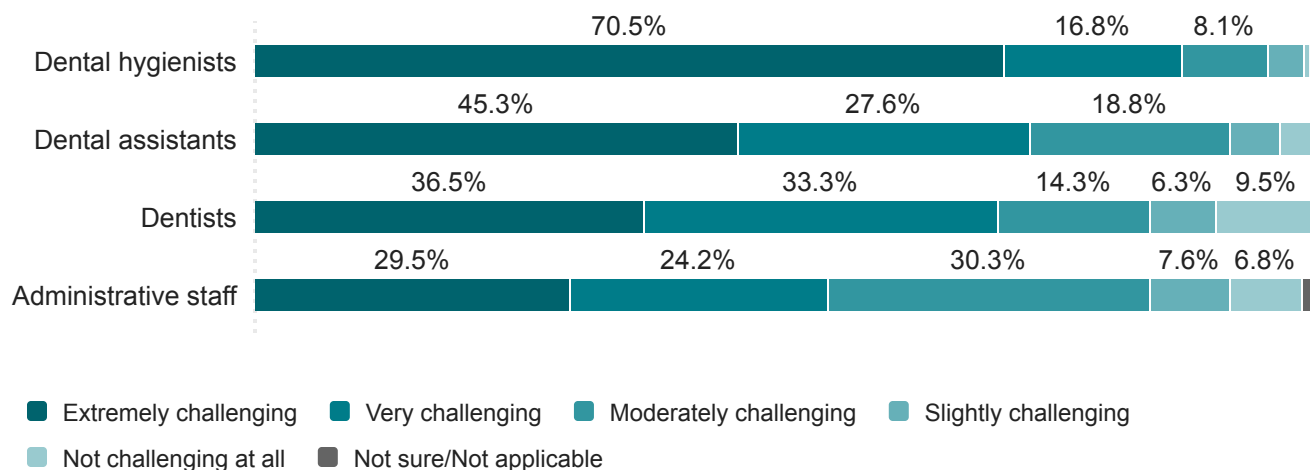
BY PRACTICE SIZE (continued)

2 to 9 dentists

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



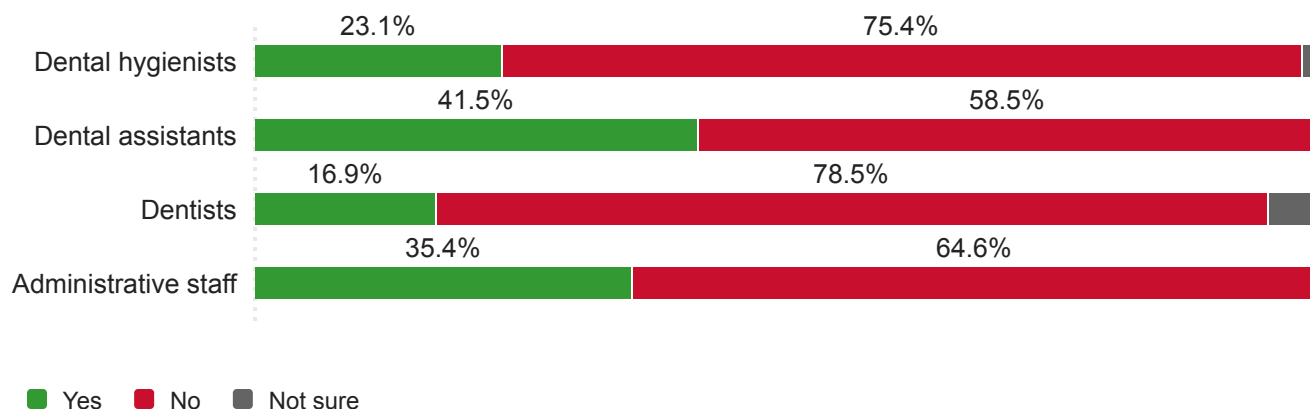
How challenging has it been to recruit the position(s) below over the last 3 months?



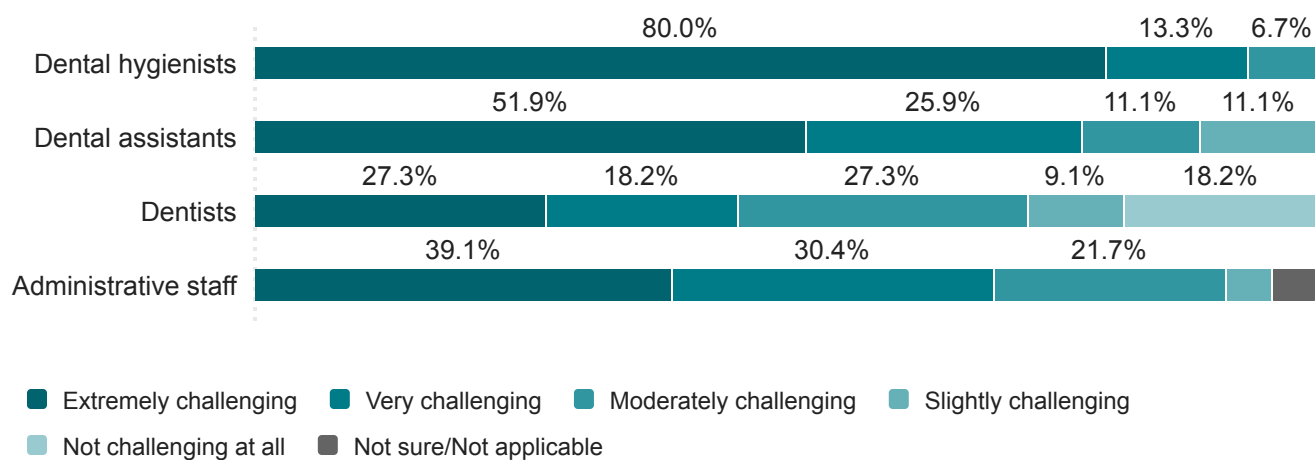
BY GEOGRAPHY

Top 20 Cities

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



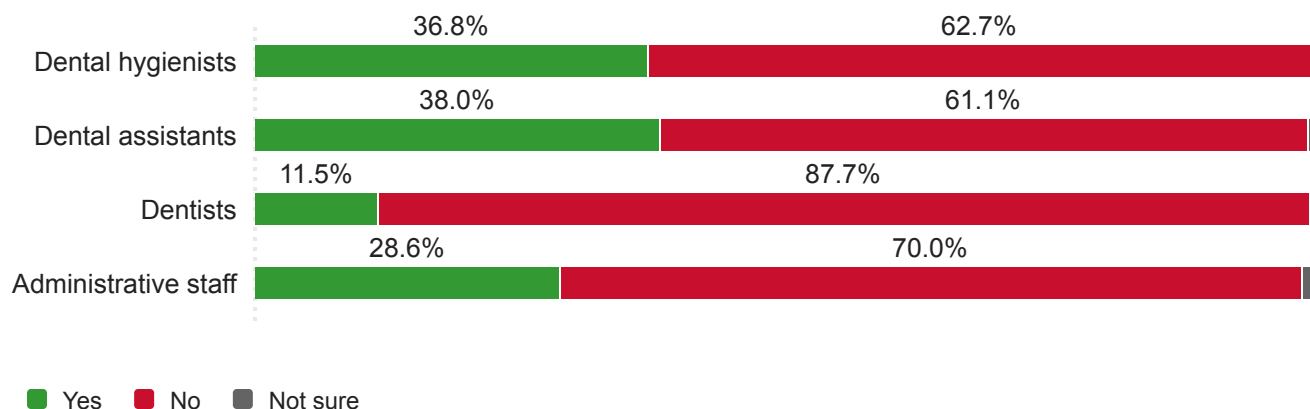
How challenging has it been to recruit the position(s) below over the last 3 months?



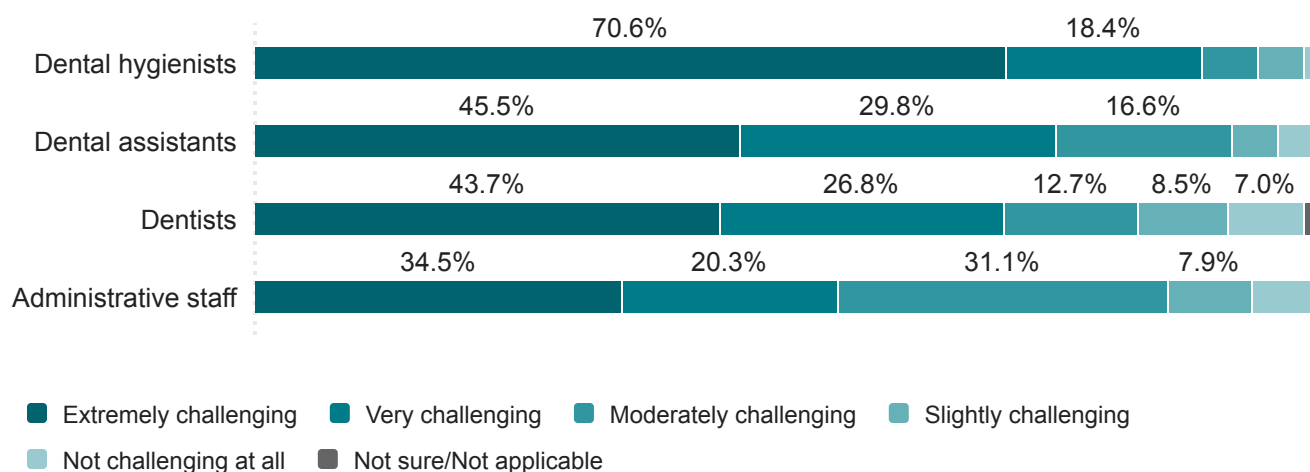
BY GEOGRAPHY (continued)

Other Urban

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



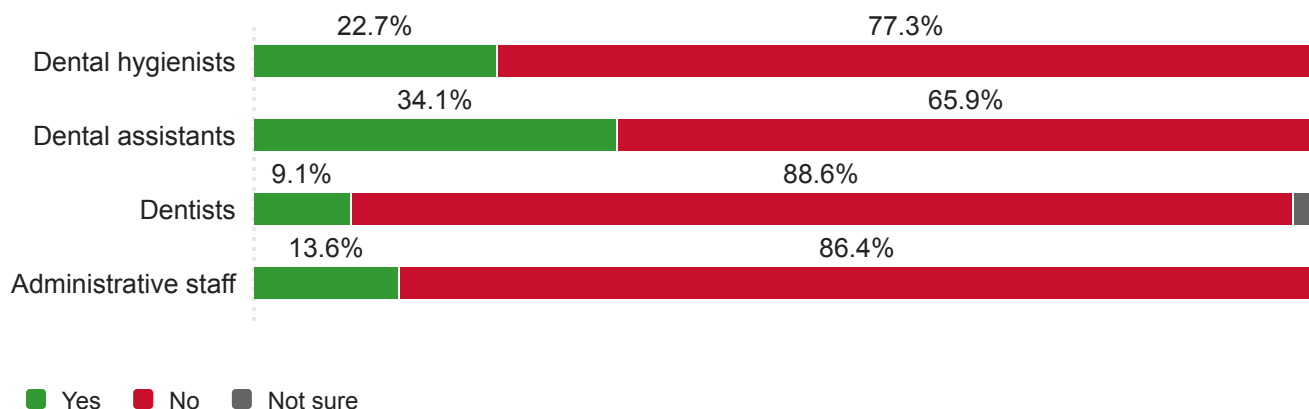
How challenging has it been to recruit the position(s) below over the last 3 months?



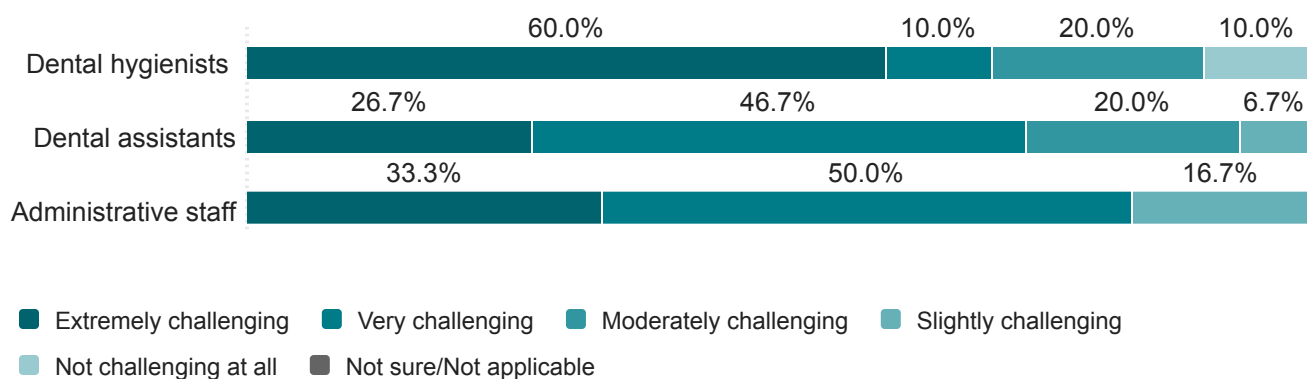
BY GEOGRAPHY (continued)

Suburban

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



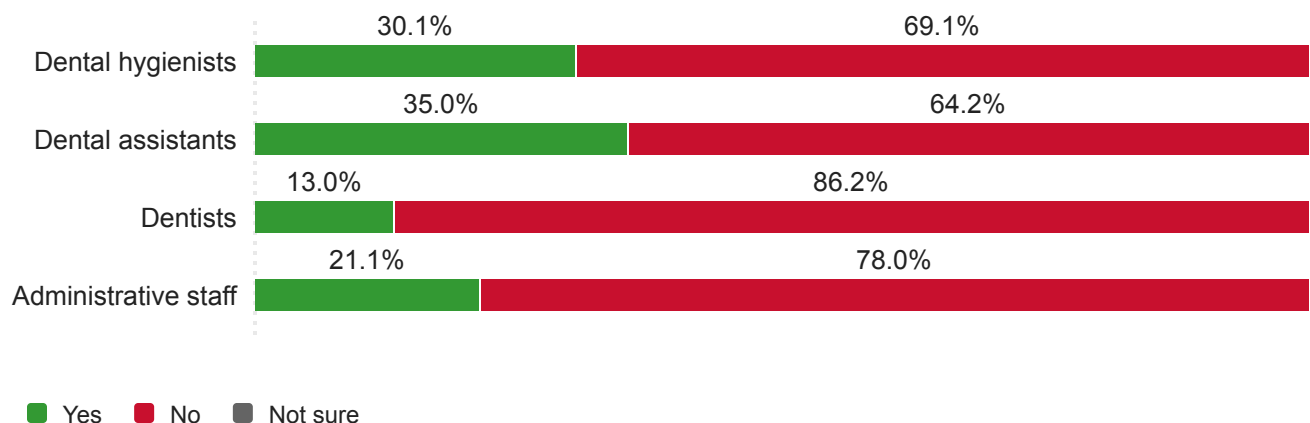
How challenging has it been to recruit the position(s) below over the last 3 months?



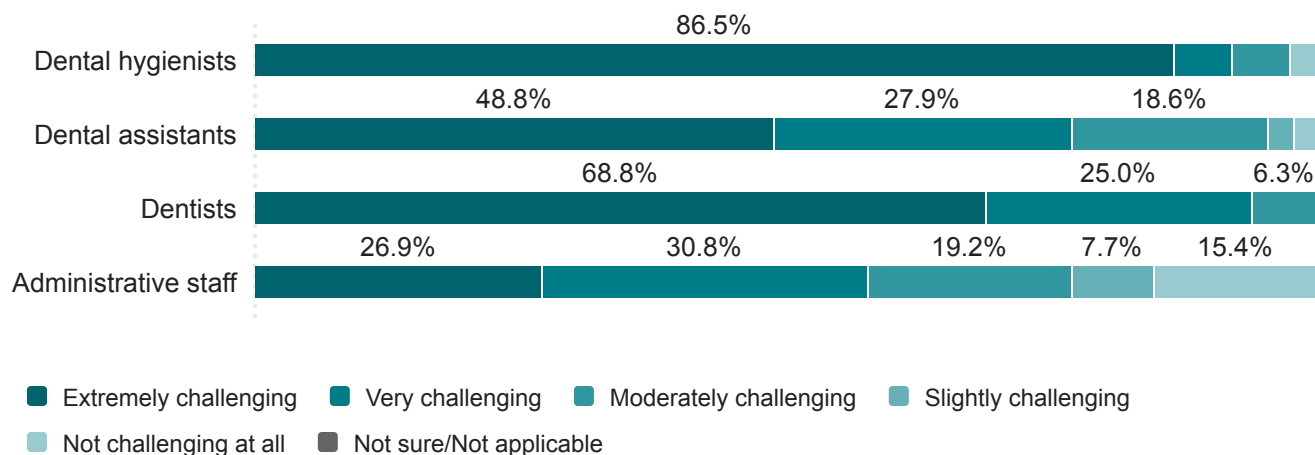
BY GEOGRAPHY (continued)

Rural

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



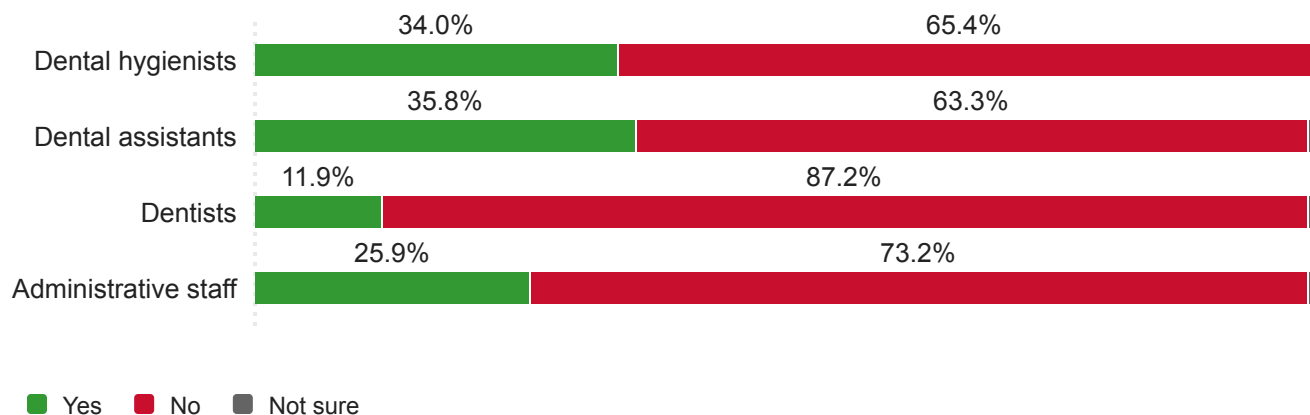
How challenging has it been to recruit the position(s) below over the last 3 months?



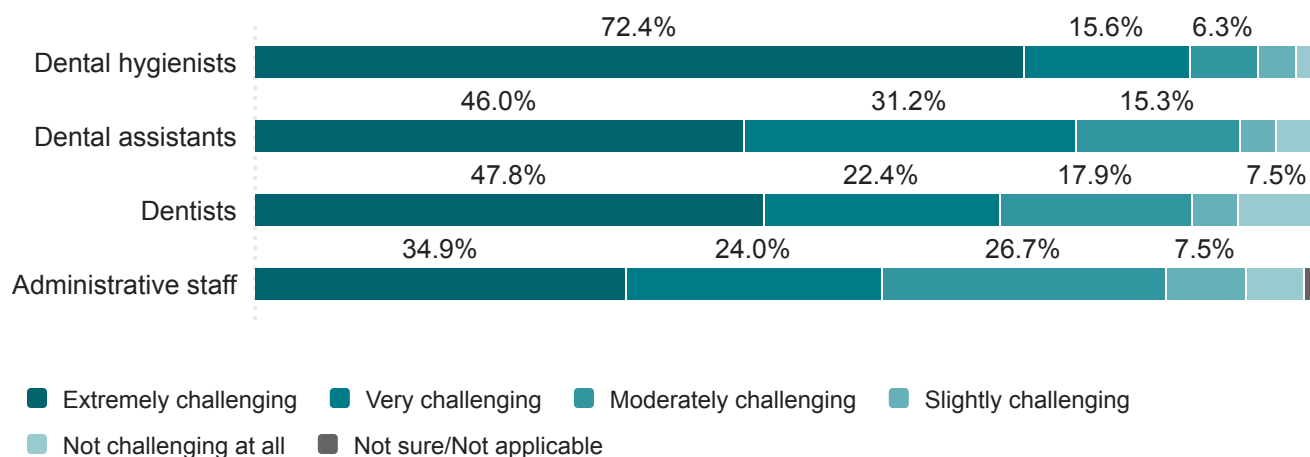
BY SEX

Male

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



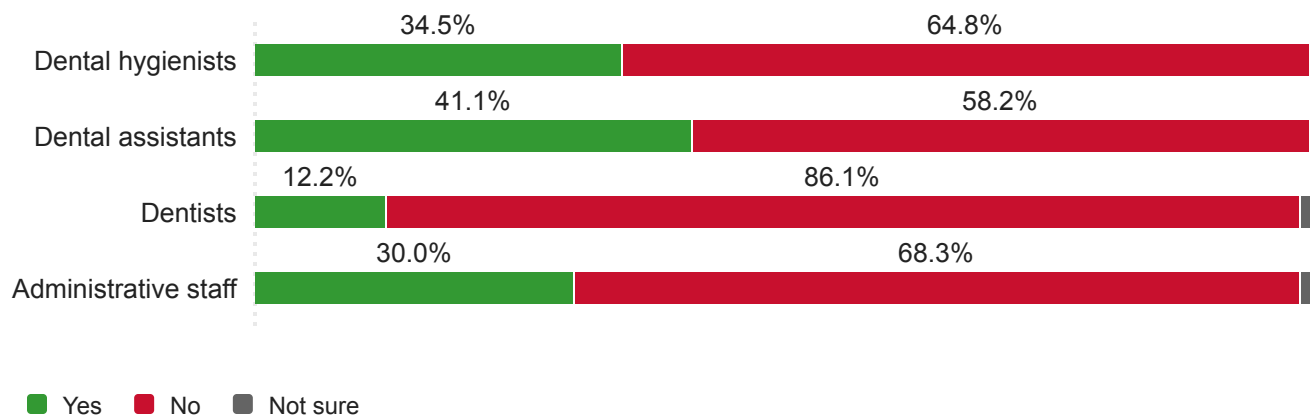
How challenging has it been to recruit the position(s) below over the last 3 months?



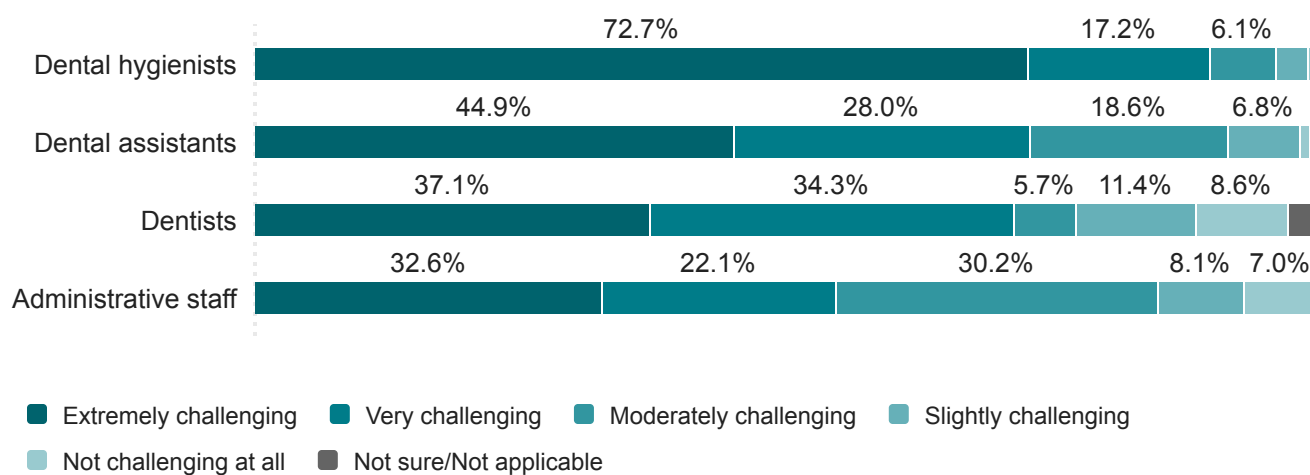
BY SEX (continued)

Female

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



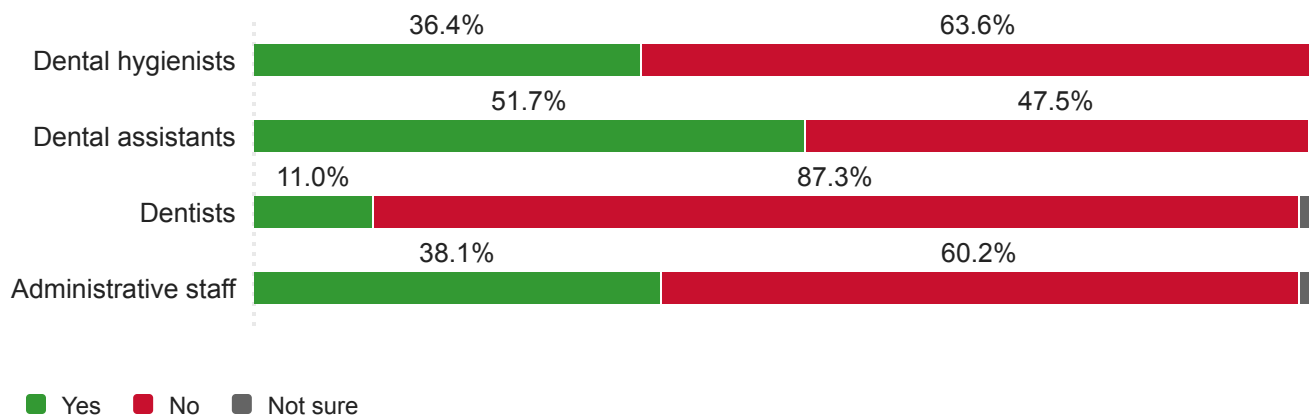
How challenging has it been to recruit the position(s) below over the last 3 months?



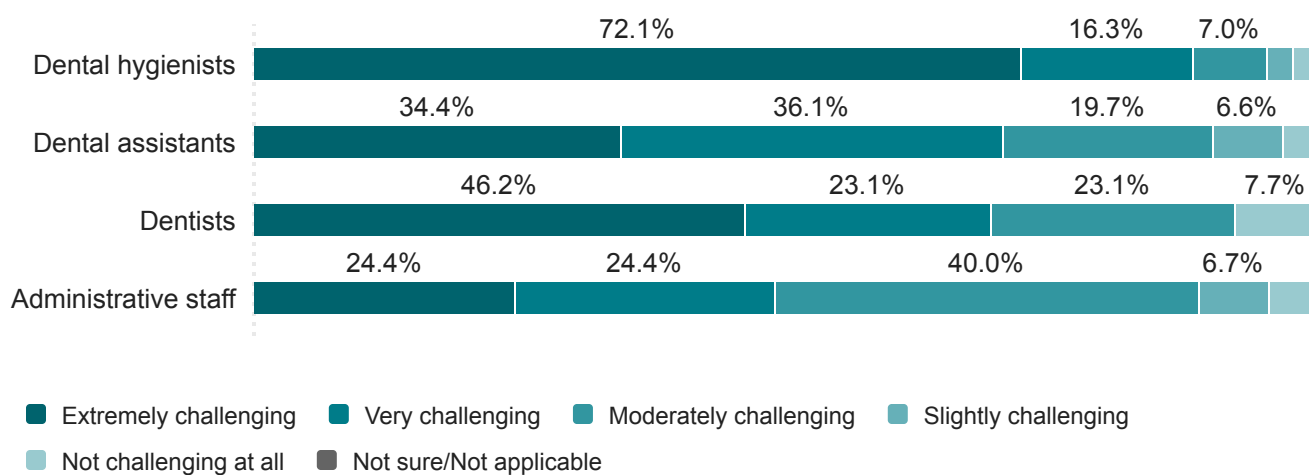
BY AGE GROUP

35 to 44

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



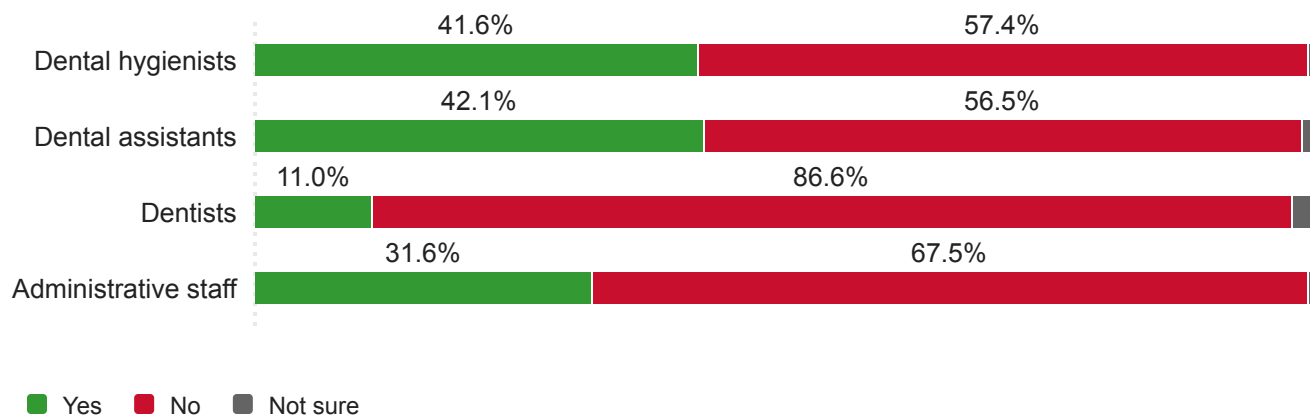
How challenging has it been to recruit the position(s) below over the last 3 months?



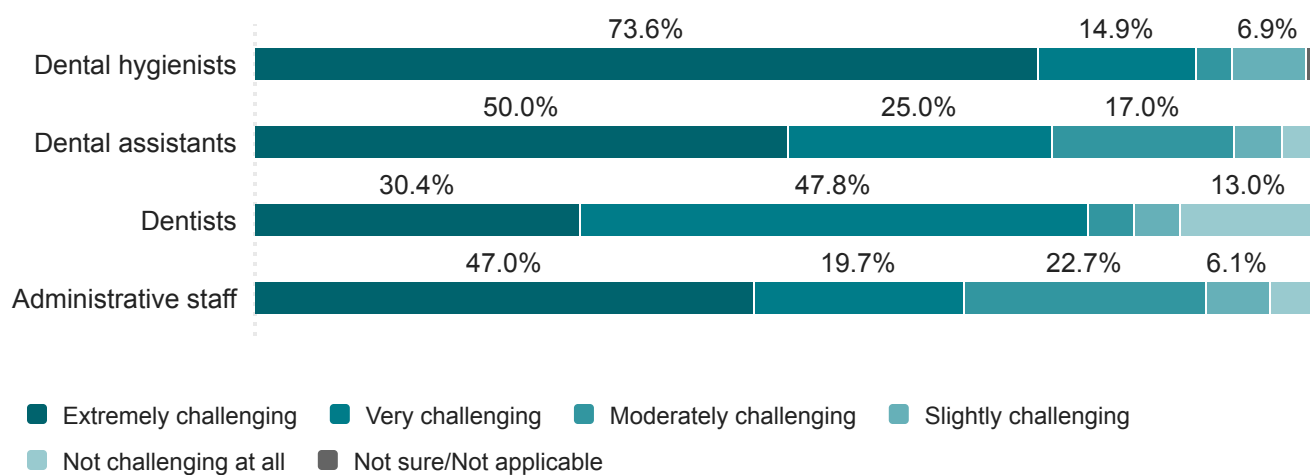
BY AGE GROUP (continued)

45 to 54

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



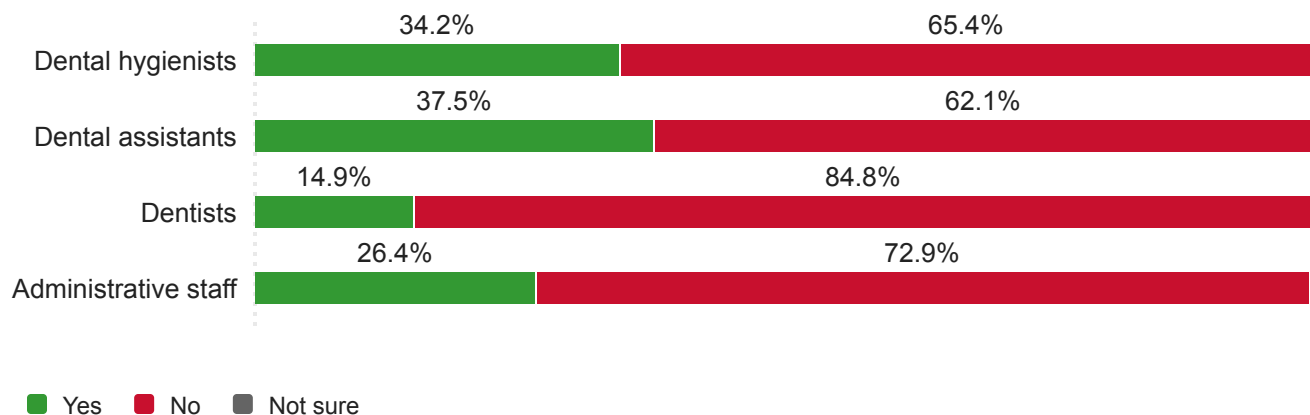
How challenging has it been to recruit the position(s) below over the last 3 months?



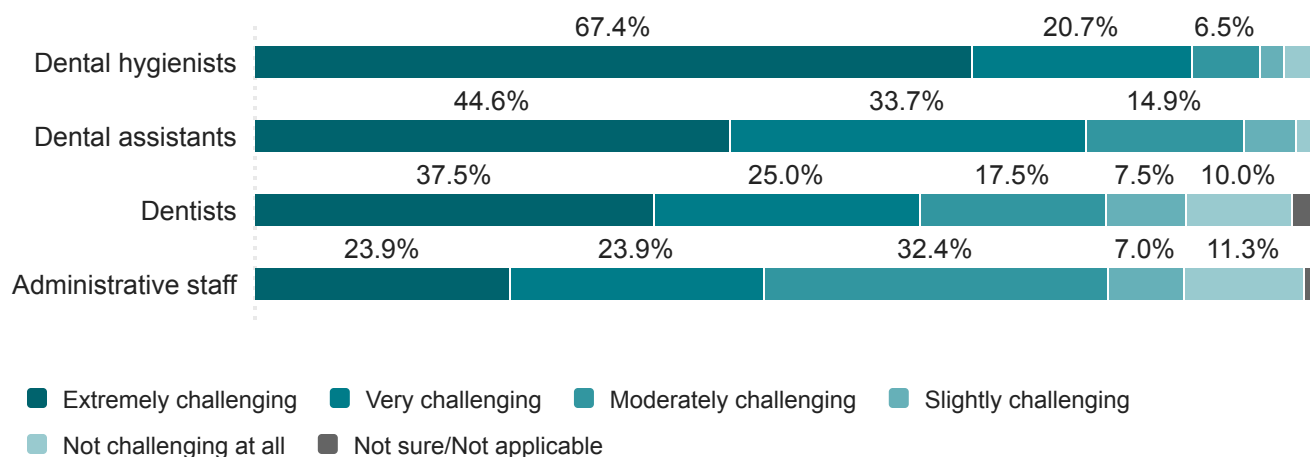
BY AGE GROUP (continued)

55 to 64

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



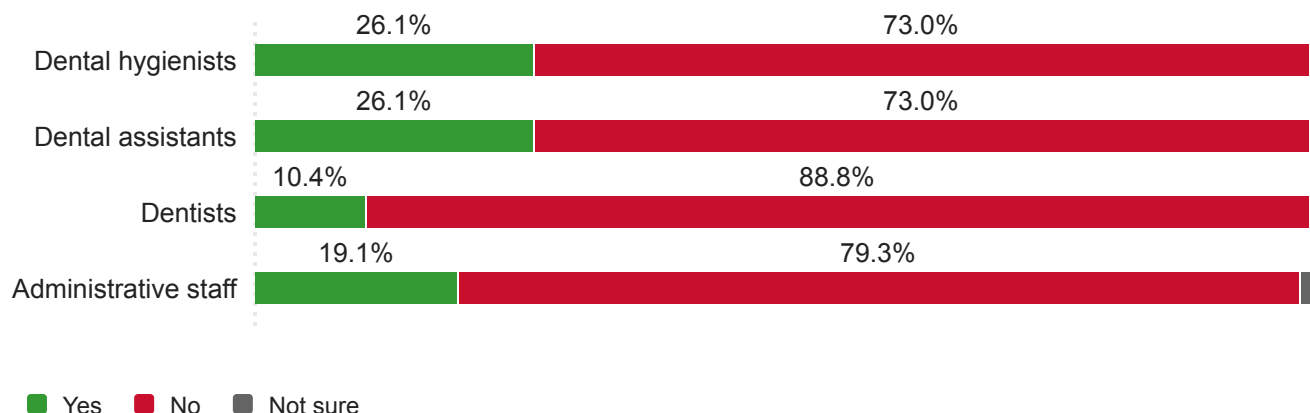
How challenging has it been to recruit the position(s) below over the last 3 months?



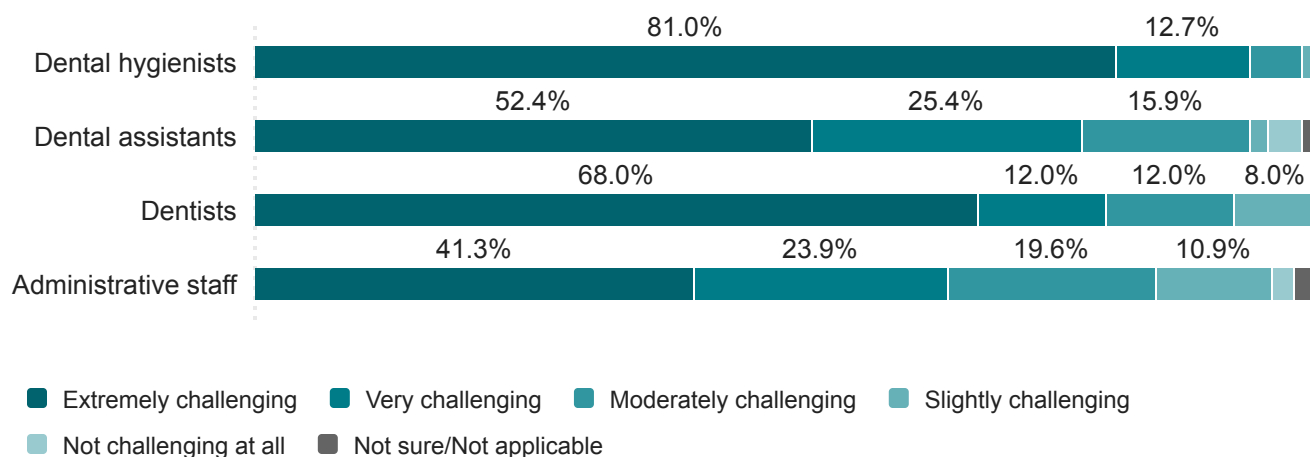
BY AGE GROUP (continued)

65 or older

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



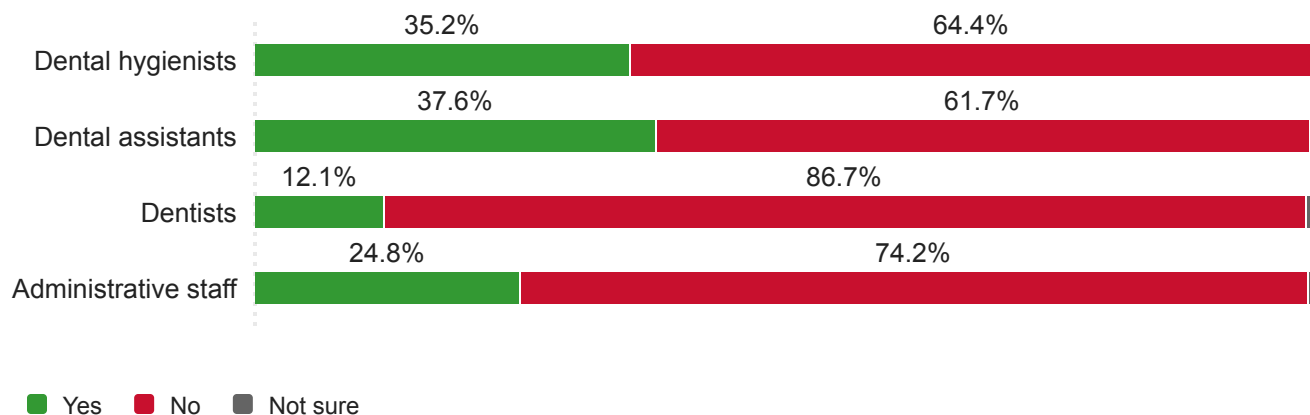
How challenging has it been to recruit the position(s) below over the last 3 months?



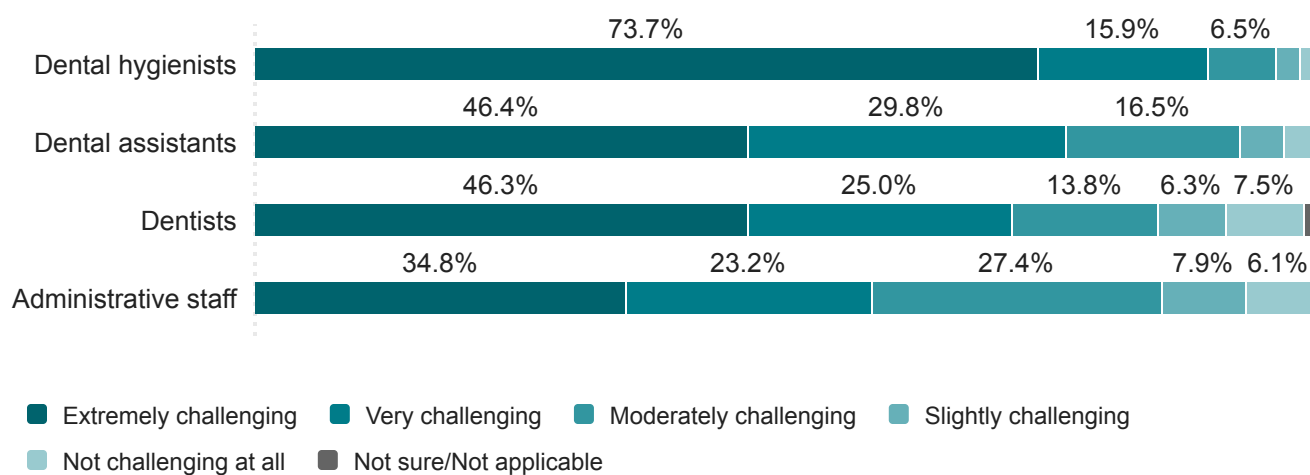
BY RACE/ETHNICITY

White

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



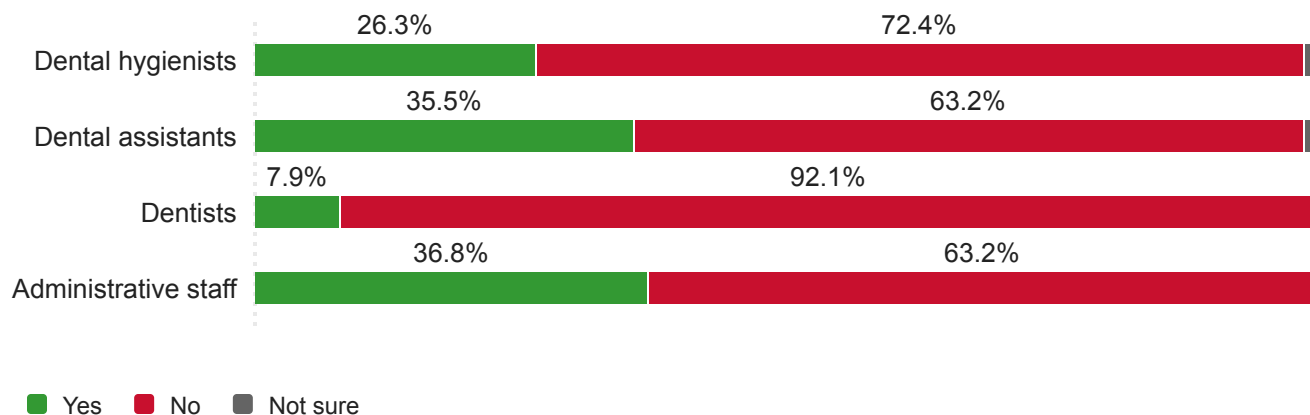
How challenging has it been to recruit the position(s) below over the last 3 months?



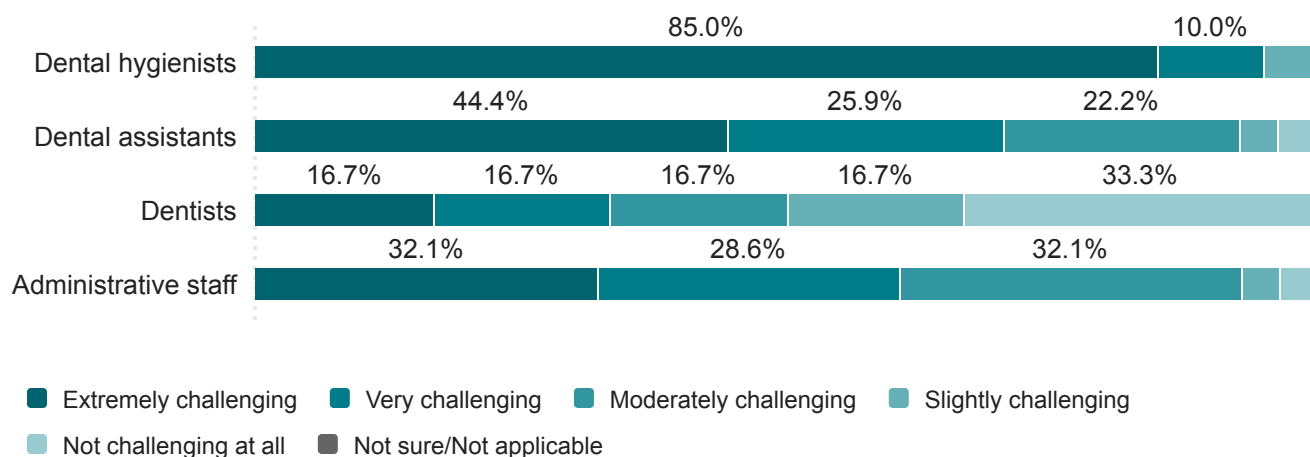
BY RACE/ETHNICITY (continued)

Asian

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



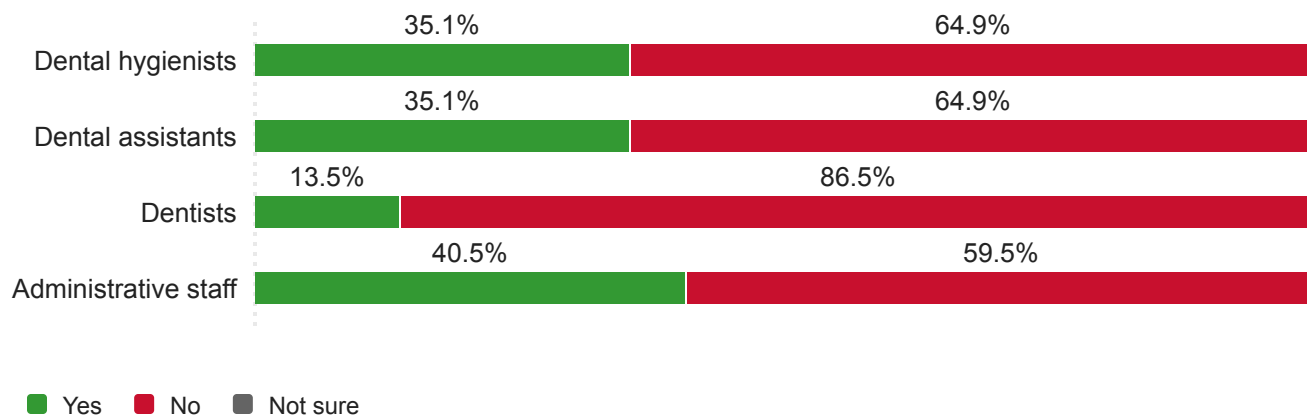
How challenging has it been to recruit the position(s) below over the last 3 months?



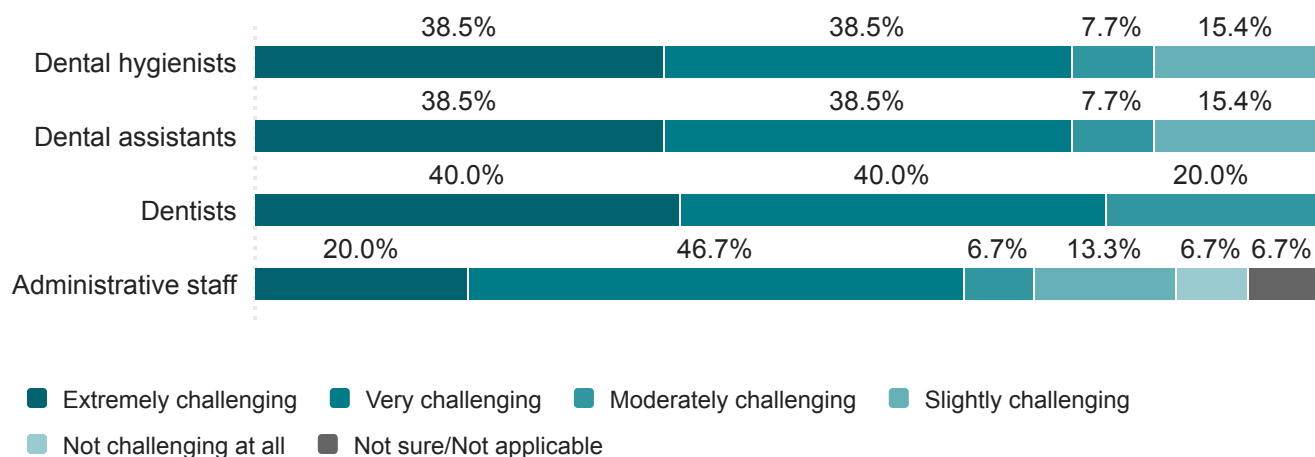
BY RACE/ETHNICITY (continued)

Hispanic

Currently, or at any time during the last 3 months, have you recruited any of the following positions?



How challenging has it been to recruit the position(s) below over the last 3 months?



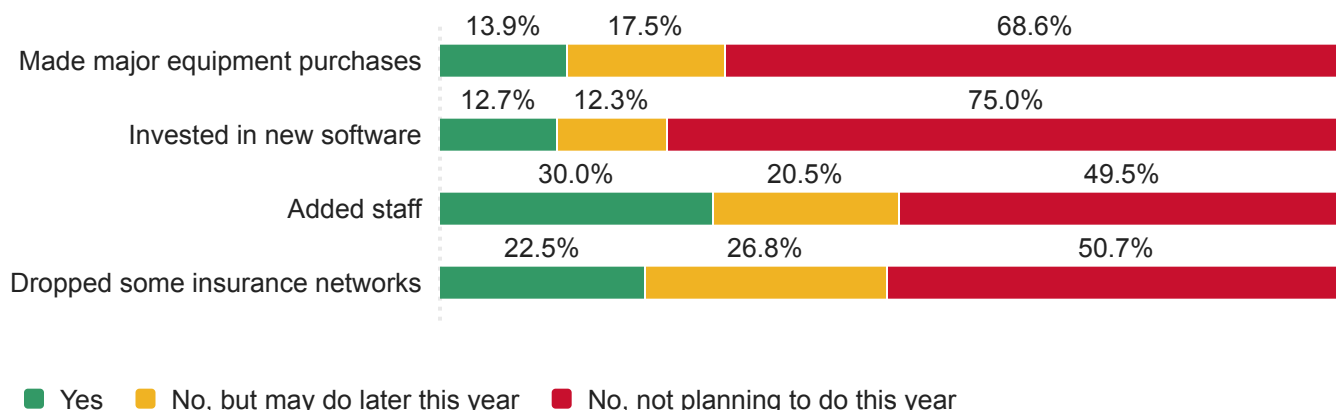
Quarter-Specific Questions

[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

By Practice Size

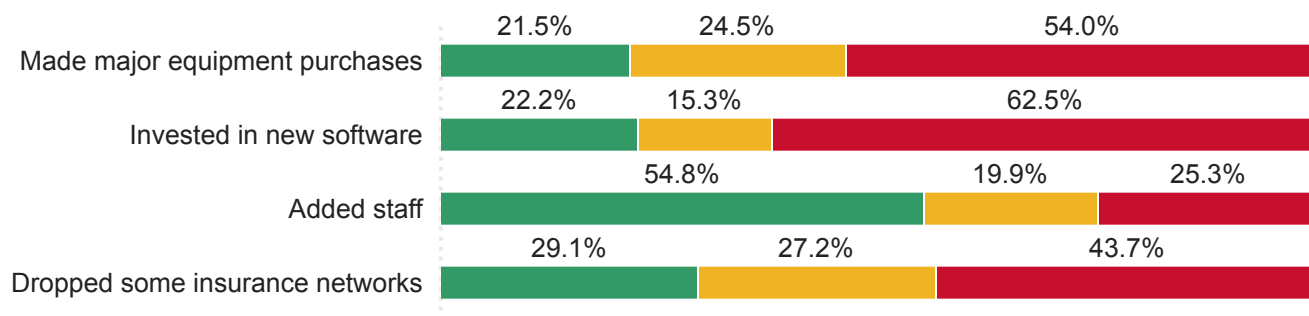
Solo dentists

503 Responses



2 to 9 dentists

261 Responses

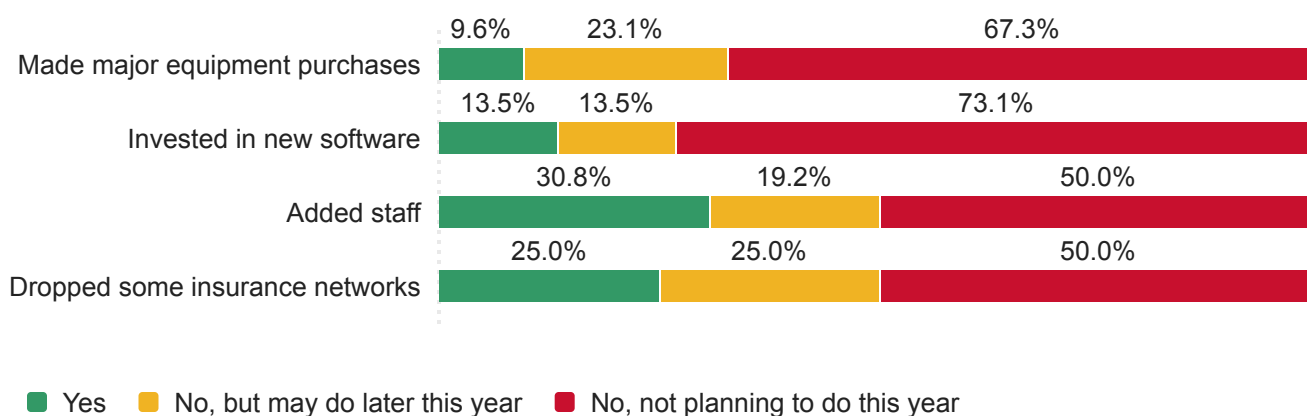


[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice? (continued)

By Geography

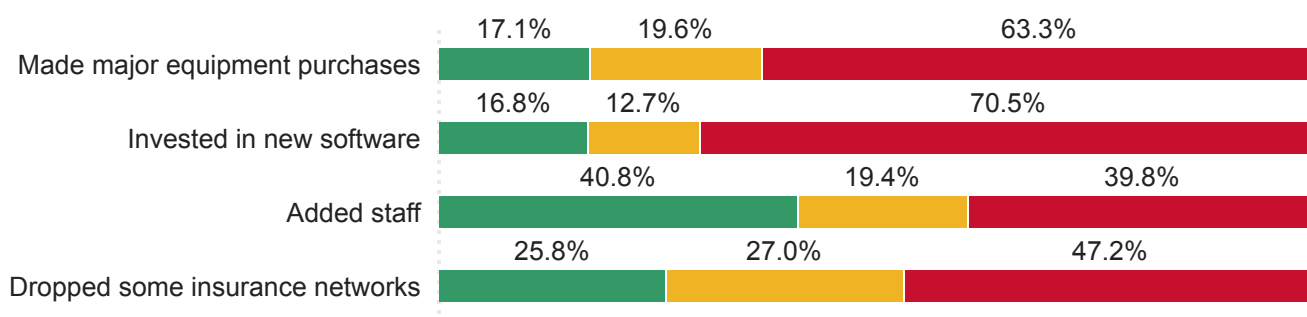
Top 20 cities

52 Responses



Other urban

566 Responses

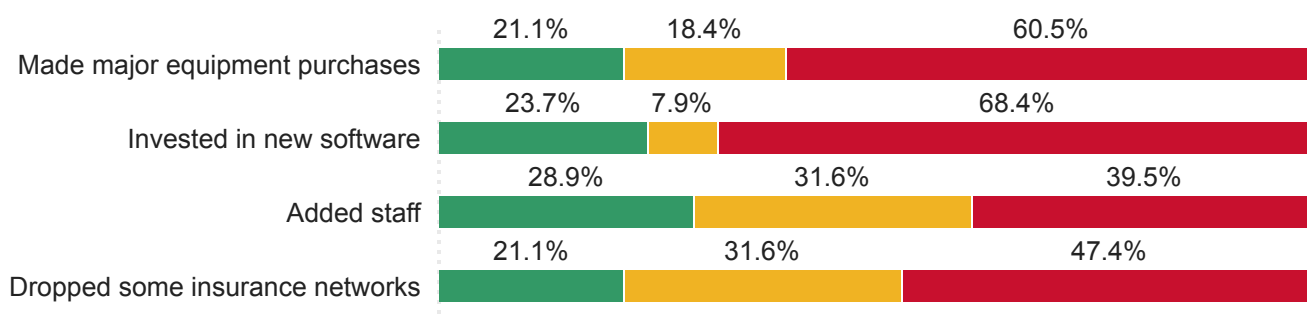


[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice? (continued)

By Geography (continued)

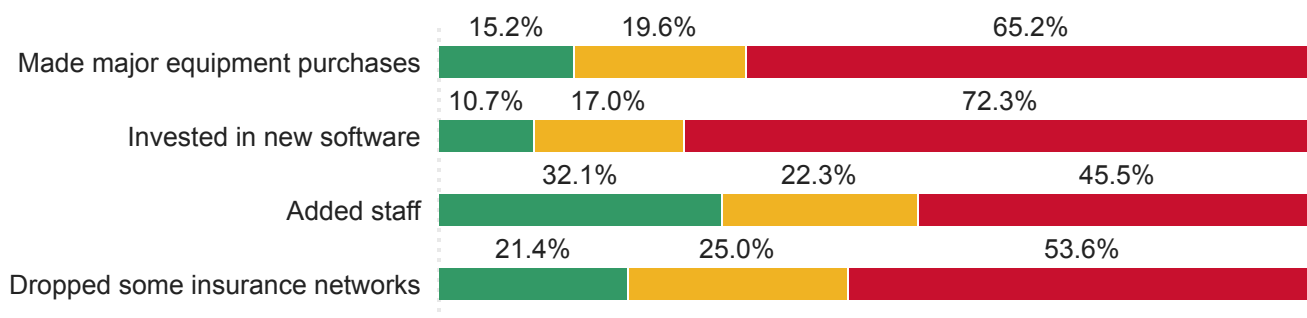
Suburban

38 Responses



Rural

112 Responses

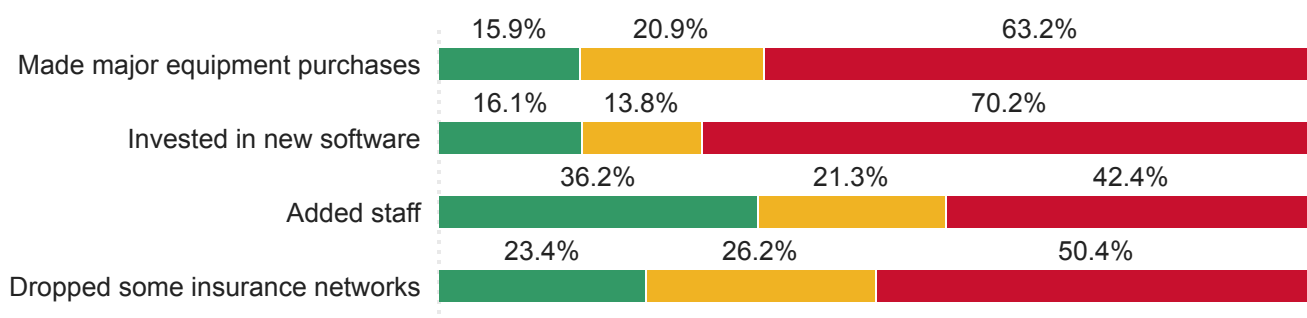


[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice? (continued)

By Sex

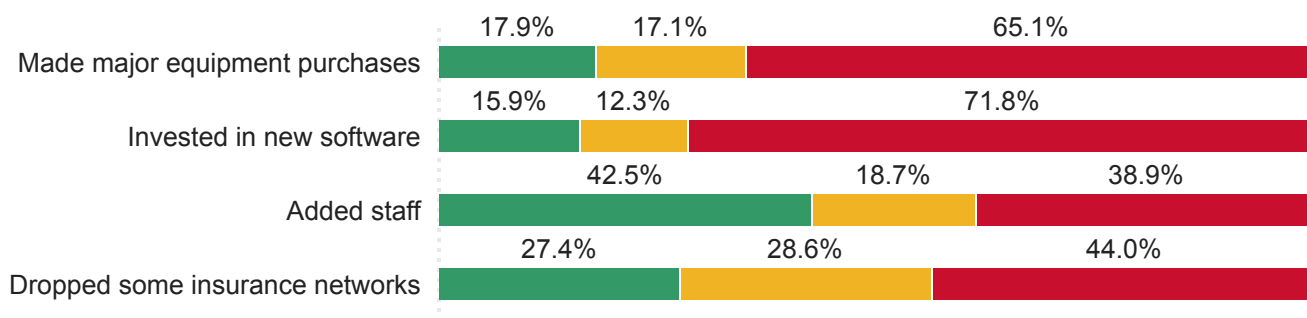
Male

516 Responses



Female

252 Responses

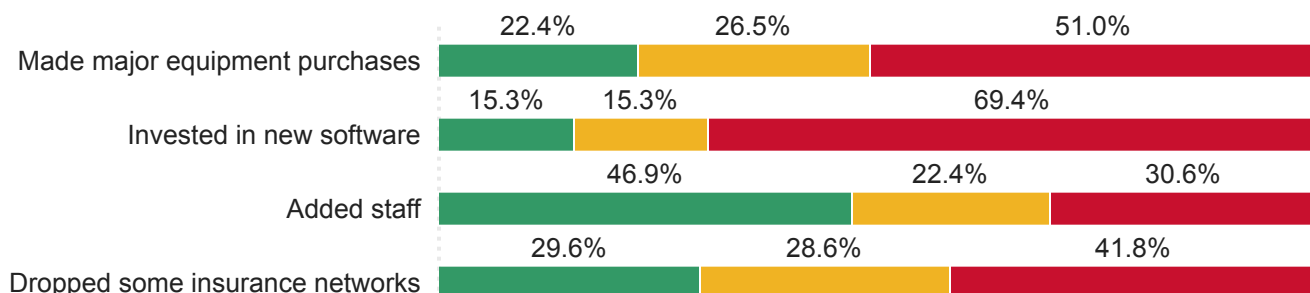


[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice? (continued)

By Age Group

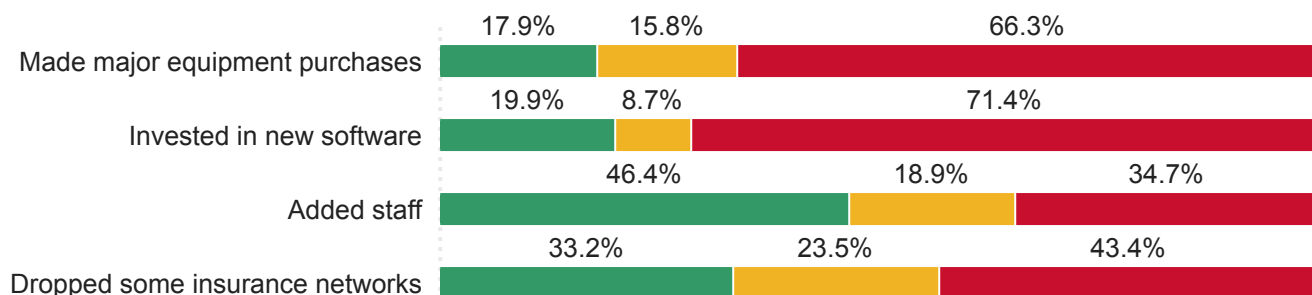
35 to 44

98 Responses



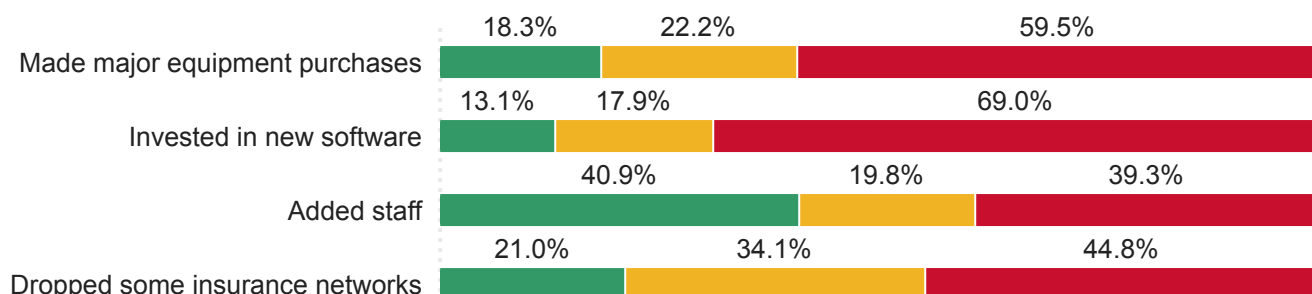
45 to 54

196 Responses



55 to 64

252 Responses

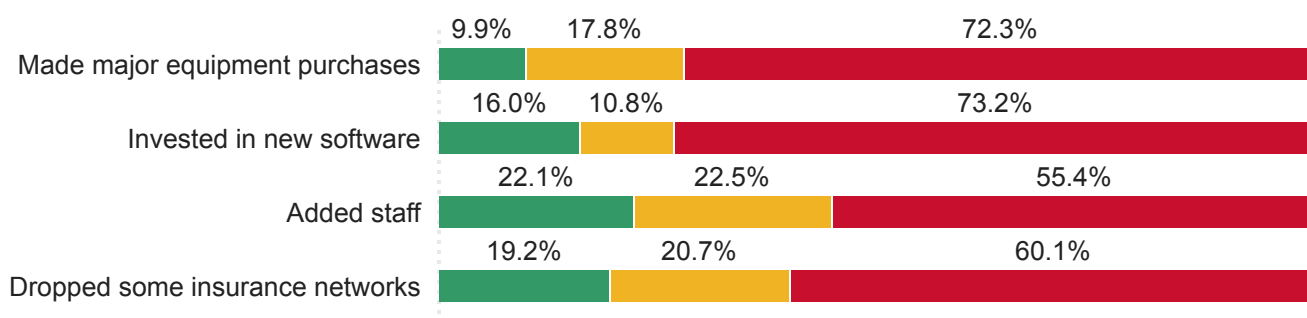


[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice? (continued)

By Age Group (continued)

65 or older

213 Responses

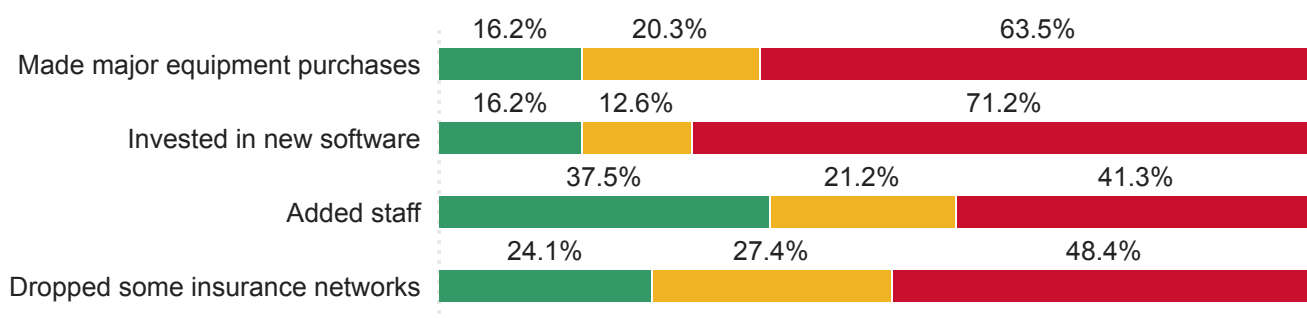


[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice? (continued)

By Race/ethnicity

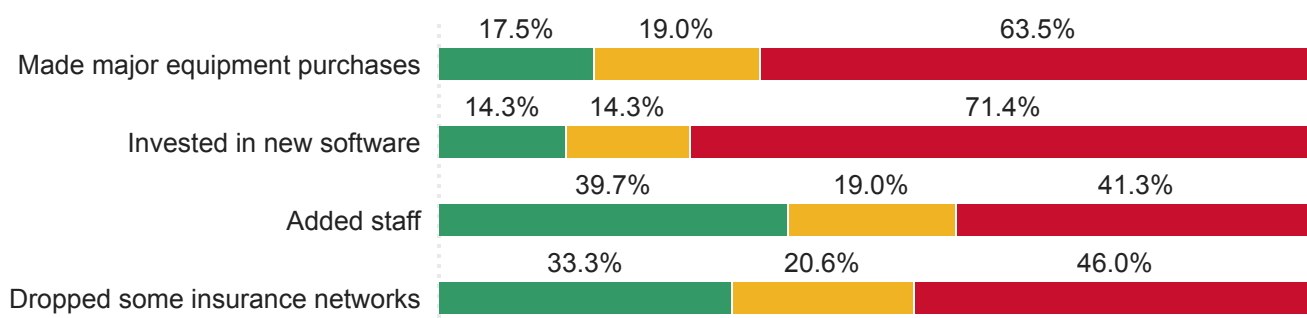
White

605 Responses



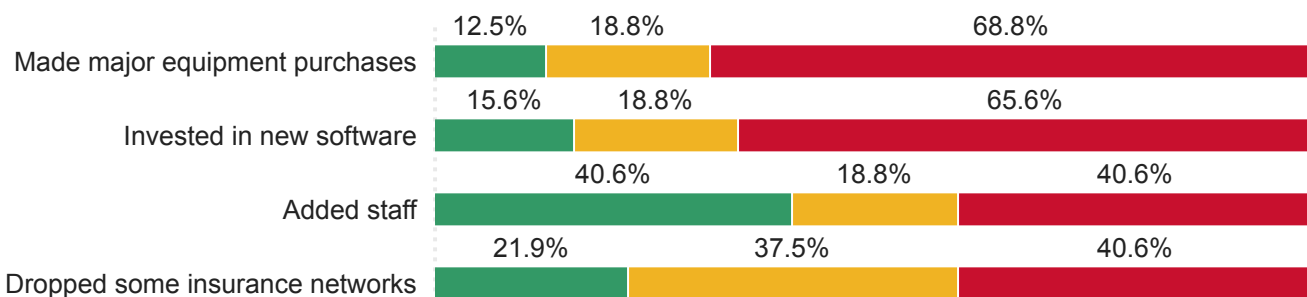
Asian

63 Responses



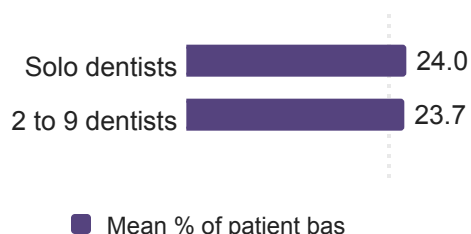
Hispanic

32 Responses

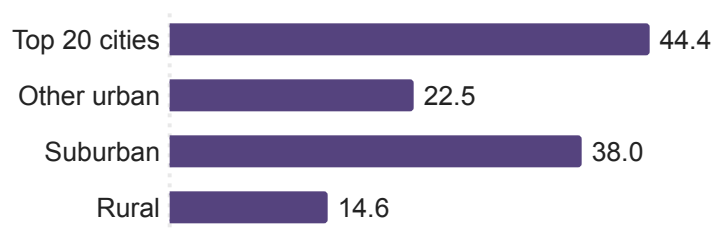


Approximately what percentage of the patient base were in the insurance networks your practice dropped out of since the beginning of 2024?

By Practice Size



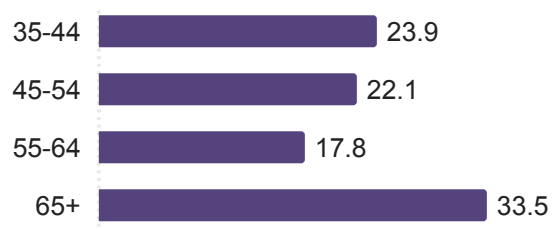
By Geography



By Sex



By Age Group



Approximately what percentage of the patient base were in the insurance networks your practice dropped out of since the beginning of 2024? (continued)

By Race/ethnicity



■ Mean % of patient base

Number of Responses from Dentists in Private Practice by Wave

Wave	Responses
2023MAR	1,053
2023APR	1,008
2023MAY	1,001
2023JUN	1,103
2023JUL	955
2023AUG	1,141
2023SEP	976
2023OCT	1,020
2023NOV	977
2023DEC	923
2024MAR	915
2024JUN	853

Number of Responses by Group - Week of June 17, 2024

Ownership Status	Choice Count
Owner dentist (i.e., sole owner, partner, or shareholder)	769
Employee dentist (nonowner)	45
Associate dentist (nonowner)	22
Independent contractor	17
DSO Affiliation	Choice Count
DSO	57
Non-DSO	796

Number of Responses by Group - Week of June 17, 2024 (continued)

Practice Size	Choice Count
Solo dentists	516
2 to 9 dentists	326
Large group (10+ dentists)	11

Geography	Choice Count
Top 20 Cities	65
Other Urban	620
Suburban	44
Rural	123

Sex	Choice Count
Male	565
Female	287

Age Group	Choice Count
<35	15
35-44	118
45-54	209
55-64	270
65+	241

Number of Responses by Group - Week of June 17, 2024 (continued)

Race/Ethnicity	Choice Count
White	660
Asian	76
Hispanic	37
Black	10
Native Hawaiian / Pacific Islander	1
American Indian / Alaska Native	4
Other	9
Unknown	55

This report was published in June 2024 by the American Dental Association’s Health Policy Institute.

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