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<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. 			
	<table border="0" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: center;">All Respondents Combined</th> <th style="text-align: center;">Select Breakouts of Results</th> </tr> </thead> </table>	All Respondents Combined	Select Breakouts of Results
All Respondents Combined	Select Breakouts of Results		
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)	<table border="0" style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;">3</td> <td style="text-align: center;">5</td> </tr> </table>	3	5
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[Owners only] Is your practice currently accepting new patients?	<table border="0" style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;">3</td> <td style="text-align: center;">12</td> </tr> </table>	3	12
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[If accepting new patients] Currently, how many business days does the average new patient have to wait for an initial appointment (excluding emergencies)?	<table border="0" style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;">3</td> <td style="text-align: center;">12</td> </tr> </table>	3	12
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Which of the following best describes your general busyness level over the last 3 months?	<table border="0" style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;">4</td> <td style="text-align: center;">18</td> </tr> </table>	4	18
4	18		
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)	<table border="0" style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;">4</td> <td style="text-align: center;">21</td> </tr> </table>	4	21
4	21		
How challenging has it been to recruit the position(s) below over the last 3 months? (Dental hygienists, Dental assistants, Dentists, Administrative staff)	<table border="0" style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;">4</td> <td style="text-align: center;">21</td> </tr> </table>	4	21
4	21		
 Number of Responses by Wave/by Group	 40		

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About This Study

The survey for the first quarter of 2024 was sent March 26, 2024 to 3,160 panel members; 973 responded for an adjusted response rate (excluding undeliverable email addresses) of 31.0%. 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 latest wave for dentists working in private dental practices. Results are also reported by ownership status, DSO affiliation, practice size, geographic location, sex, years of experience, 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.

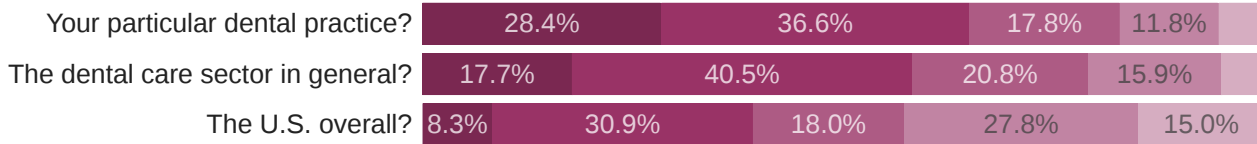
Lastly, the following edits were made to reflect the updated cadence of this poll and in response to panelists' feedback:

- *“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:

902 Responses



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

[Owners only] 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?

902 Responses

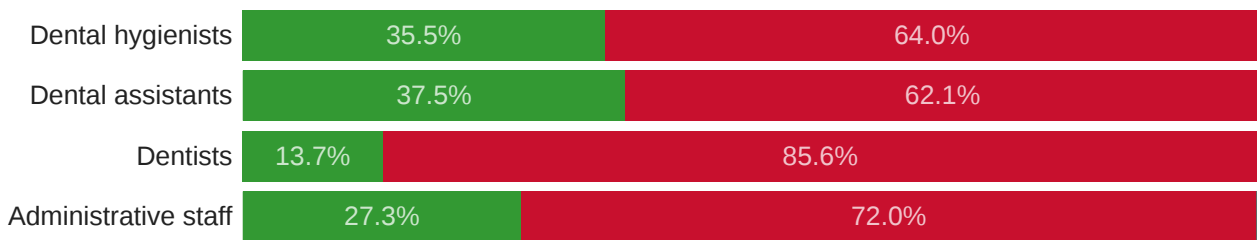


- Too busy to treat all people requesting appointments
- Provided care to all who requested appointments but was overworked
- Provided care to all who requested appointments but was not overworked
- Not busy enough, could have treated more patients



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

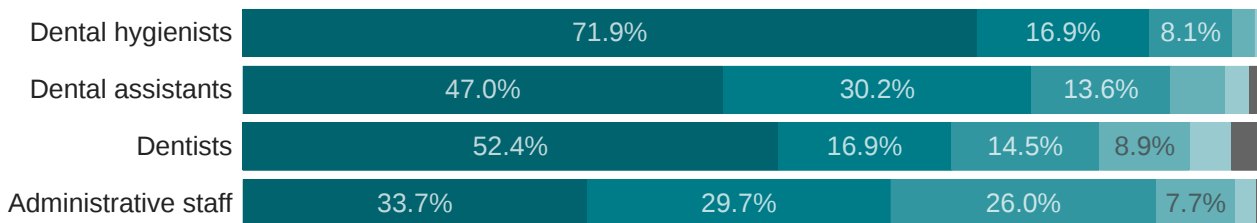
902 Responses



● Yes ● No ● Not sure

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

550 Responses



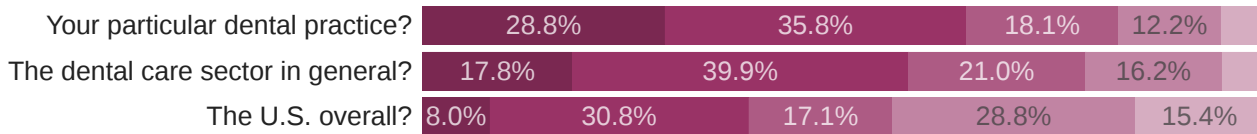
● Extremely challenging ● Very challenging ● Moderately challenging ● Slightly challenging
● Not challenging at all ● Not sure/Not applicable

Economic Confidence

BY OWNERSHIP STATUS

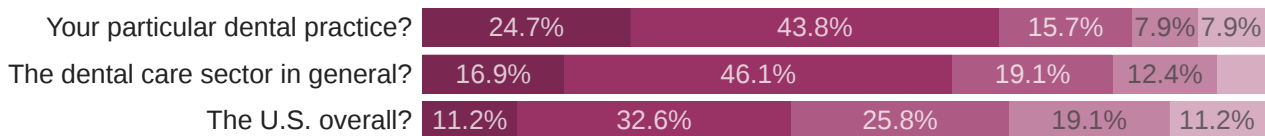
Looking ahead the next 6 months, how confident are you in the economic conditions in:

Owner



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

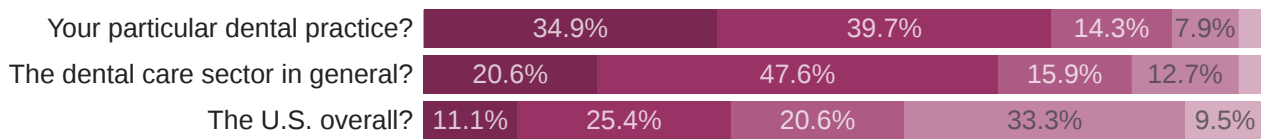
Non-owner



BY DSO AFFILIATION

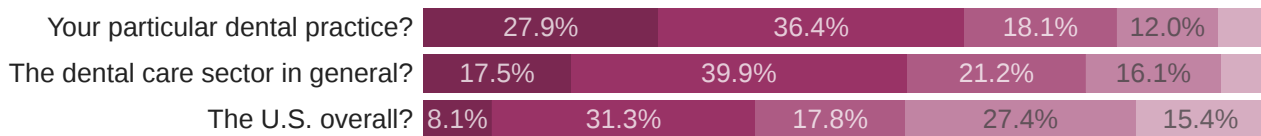
Looking ahead the next 6 months, how confident are you in the economic conditions in:

DSO



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

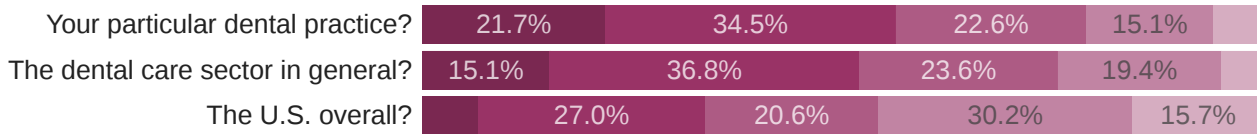
Non-DSO



BY PRACTICE SIZE

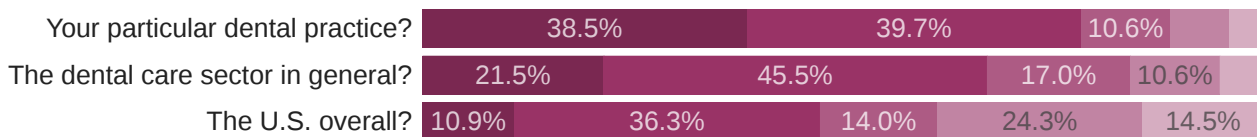
Looking ahead the next 6 months, how confident are you in the economic conditions in:

Solo dentists



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

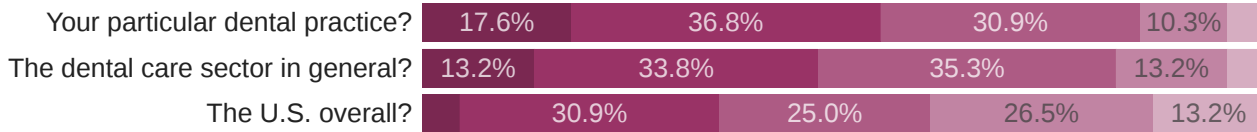
2 to 9 dentists



BY GEOGRAPHY

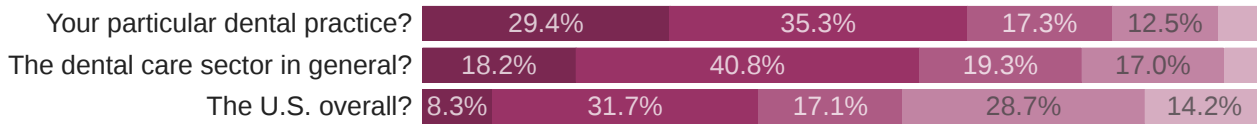
Looking ahead the next 6 months, how confident are you in the economic conditions in:

Top 20 cities

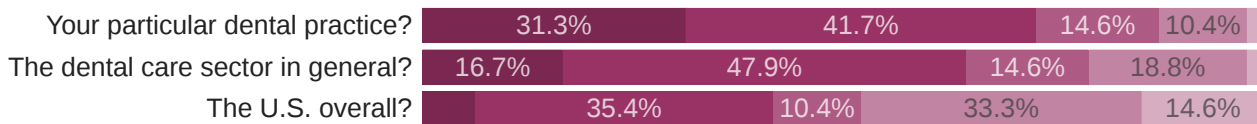


- Very confident
- Somewhat confident
- Neither confident nor skeptical
- Somewhat skeptical
- Very skeptical

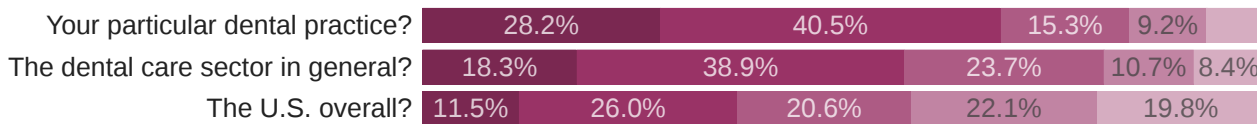
Other urban



Suburban



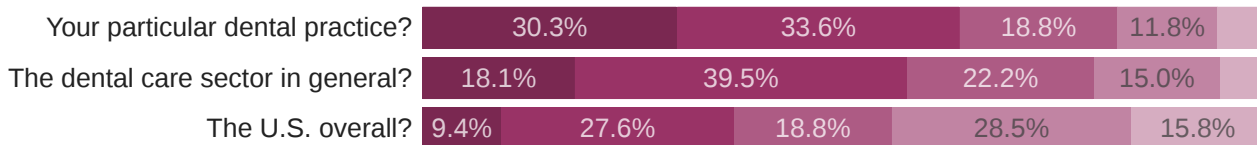
Rural



BY SEX

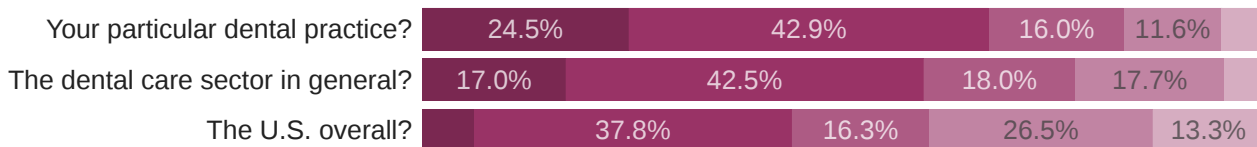
Looking ahead the next 6 months, how confident are you in the economic conditions in:

Male



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

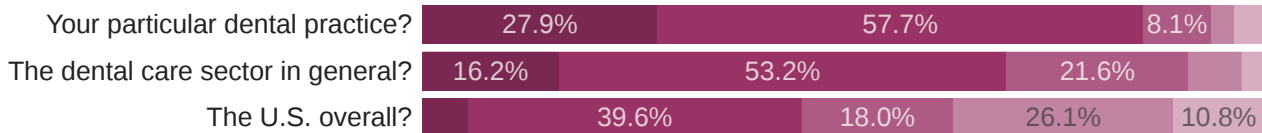
Female



BY AGE GROUP

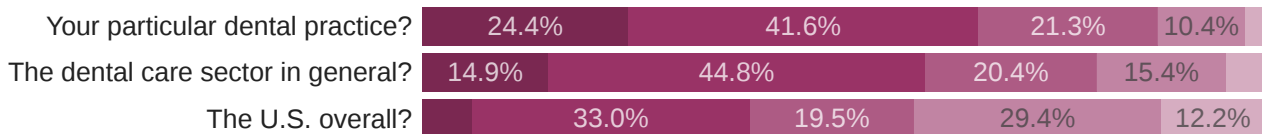
Looking ahead the next 6 months, how confident are you in the economic conditions in:

35 to 44

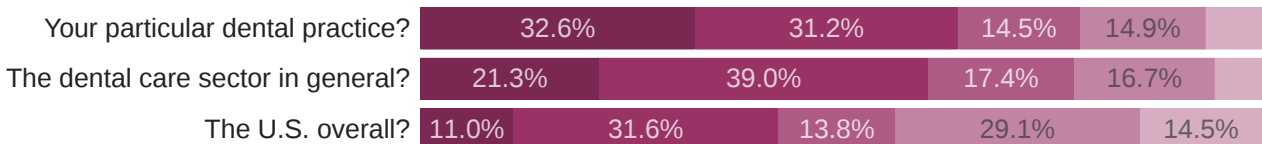


- Very confident
- Somewhat confident
- Neither confident nor skeptical
- Somewhat skeptical
- Very skeptical

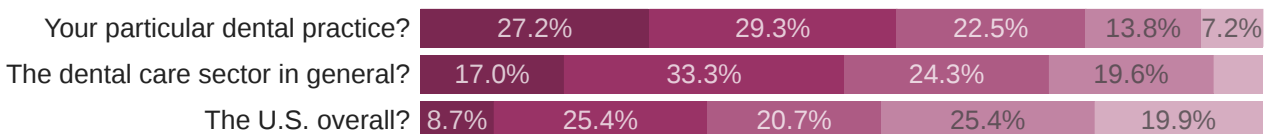
45 to 54



55 to 64



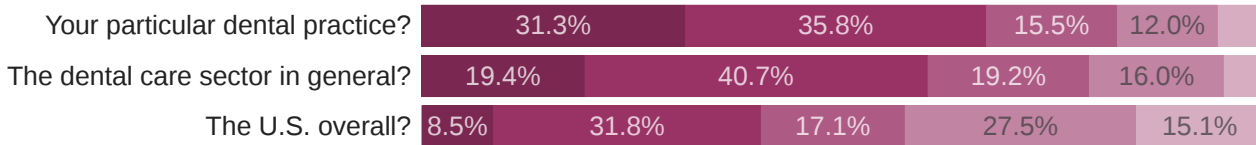
65 or older



BY RACE/ETHNICITY

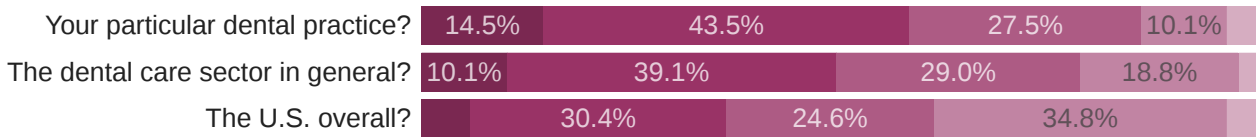
Looking ahead the next 6 months, how confident are you in the economic conditions in:

White

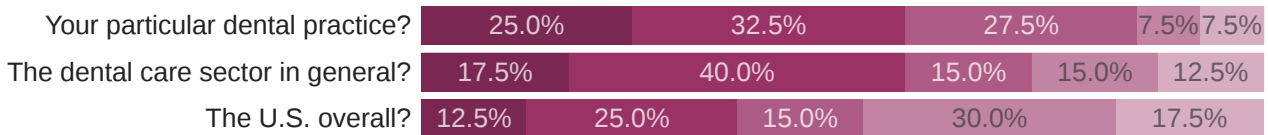


- Very confident
- Somewhat confident
- Neither confident nor skeptical
- Somewhat skeptical
- Very skeptical

Asian



Hispanic



Patient Wait Times

BY DSO AFFILIATION

**[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 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)? (Average number of days)**

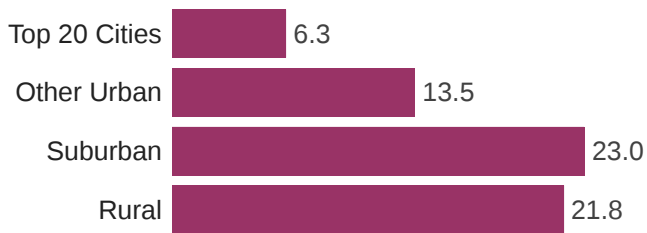


BY GEOGRAPHY

**[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)? (Average number of days)**

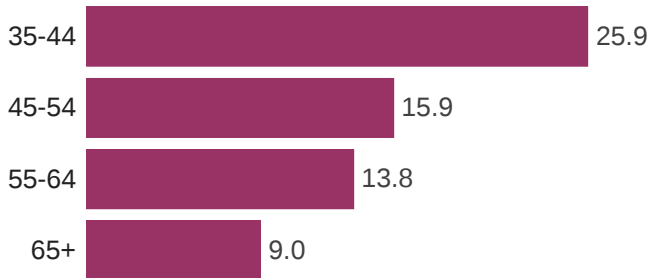


BY AGE GROUP

**[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)**



Business

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

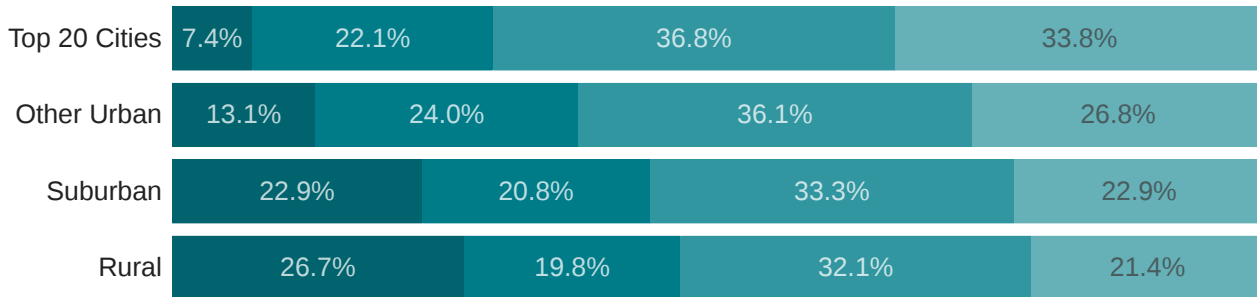


BY PRACTICE SIZE



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

BY GEOGRAPHY



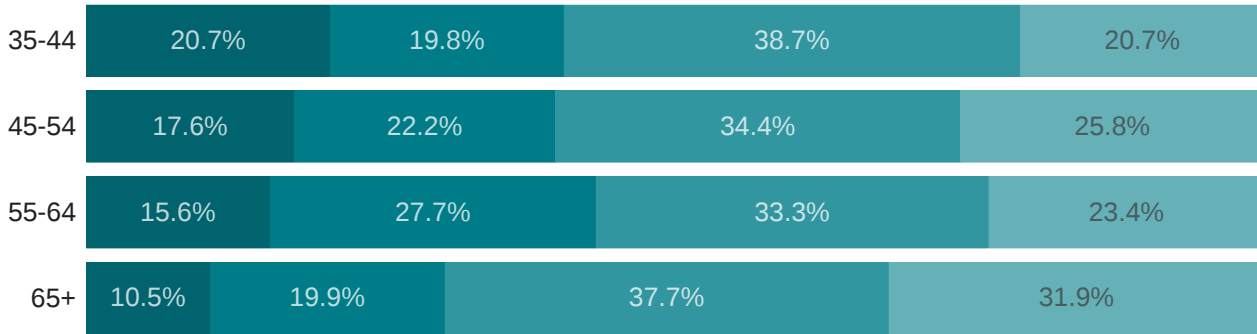
- Too busy to treat all people requesting appointments
- Provided care to all who requested appointments but was overworked
- Provided care to all who requested appointments but was not overworked
- Not busy enough, could have treated more patients

BY GENDER



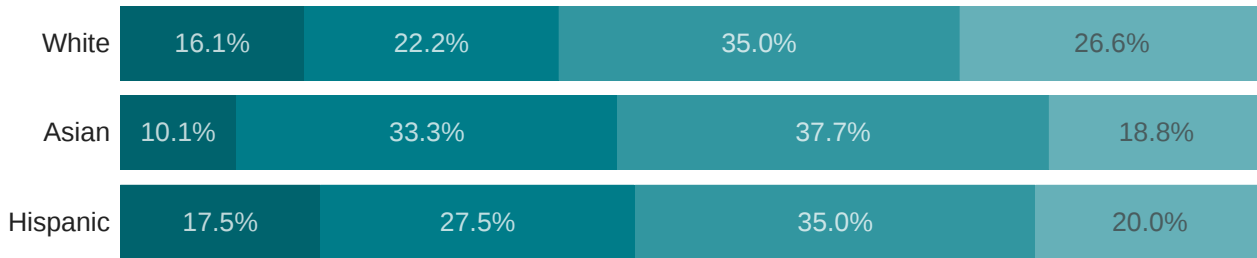
Which of the following best describes your general busyness level over the last 3 months? (continued)

BY AGE GROUP



- 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 RACE/ETHNICITY



Staff Recruitment

BY OWNERSHIP STATUS

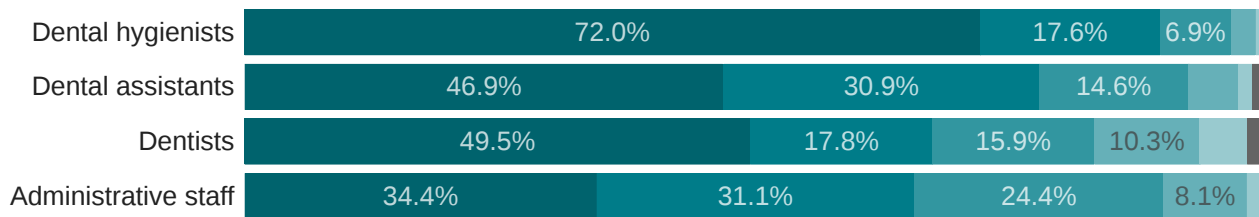
Owner dentists

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



● Yes ● No ● Not sure

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

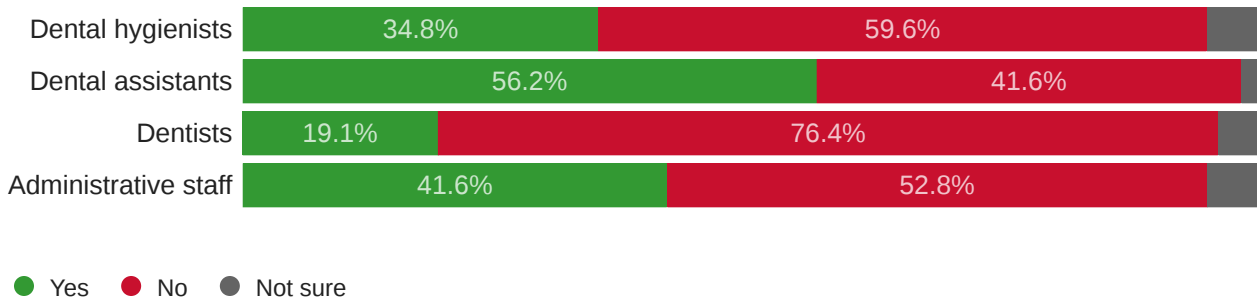


● Extremely challenging ● Very challenging ● Moderately challenging ● Slightly challenging
● Not challenging at all ● Not sure/Not applicable

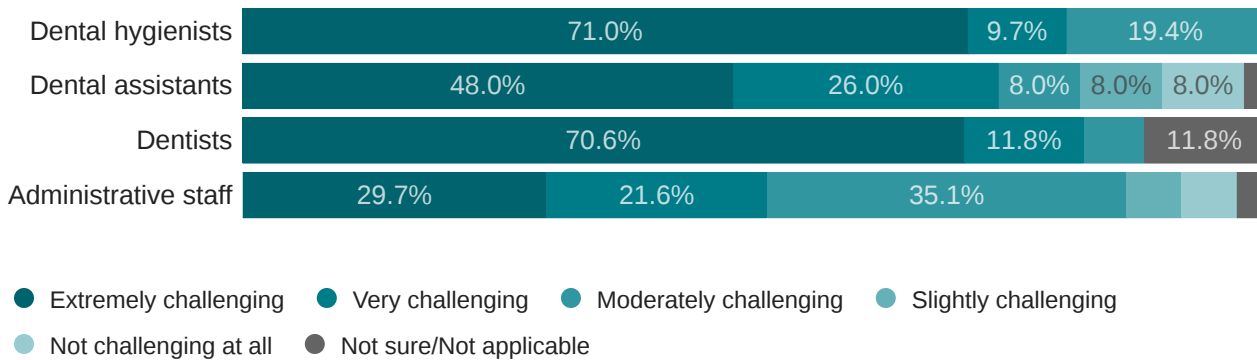
BY OWNERSHIP STATUS (continued)

Non-owner dentists

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



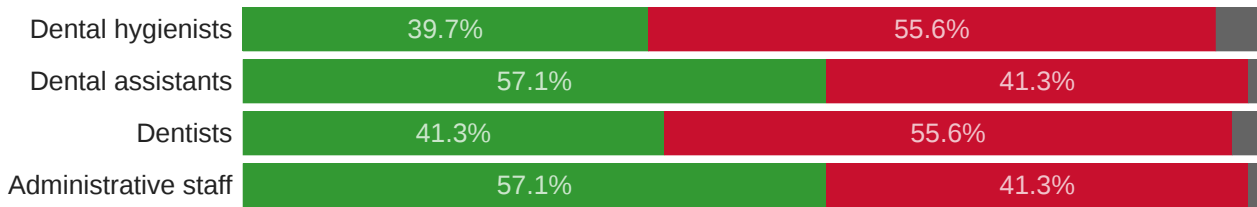
How challenging has it been to recruit the position(s) below over the last 3 months?



BY DSO AFFILIATION

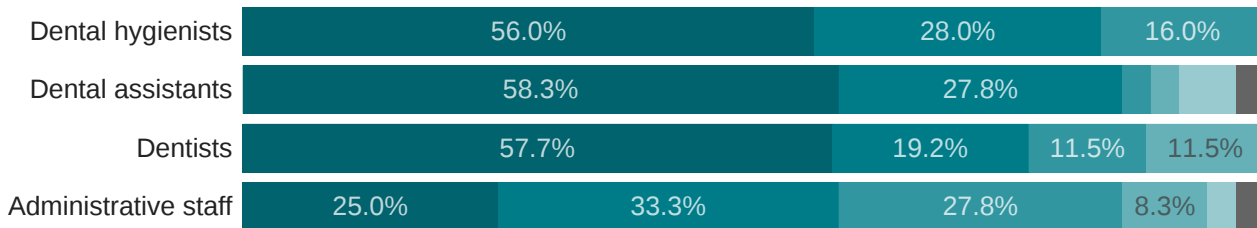
DSO

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



● Yes ● No ● Not sure

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

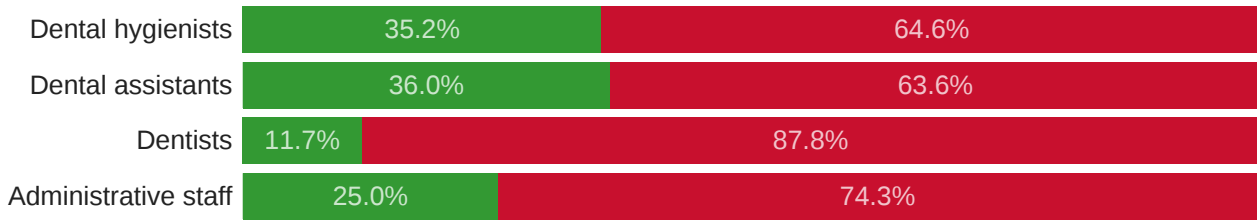


● Extremely challenging ● Very challenging ● Moderately challenging ● Slightly challenging
● Not challenging at all ● Not sure/Not applicable

BY DSO AFFILIATION (continued)

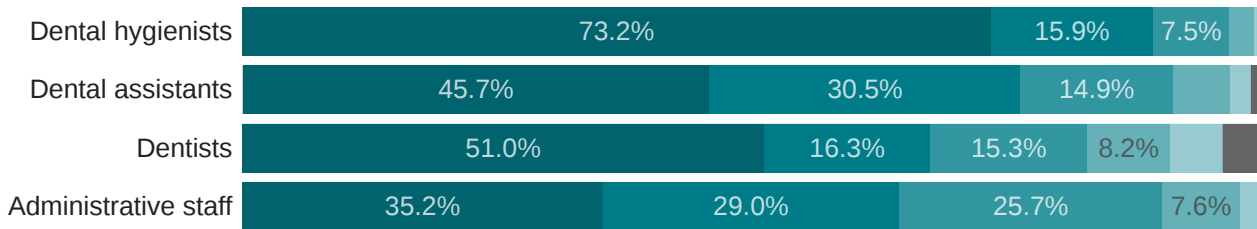
Non-DSO

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



● Yes ● No ● Not sure

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



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

BY PRACTICE SIZE

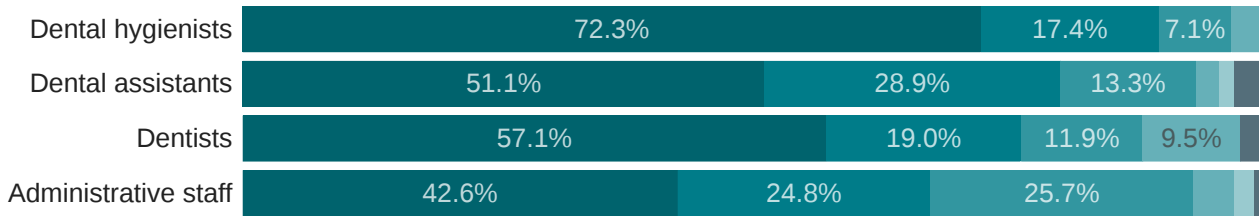
Solo dentists

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



● Yes ● No ● Not sure

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

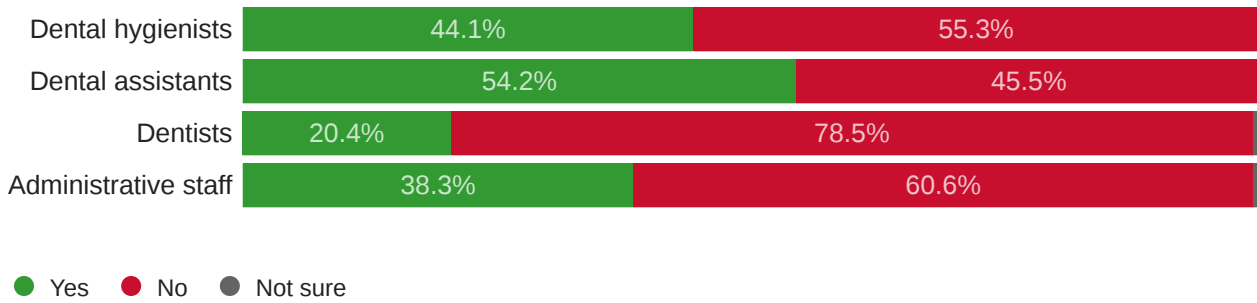


● Extremely challenging ● Very challenging ● Moderately challenging ● Slightly challenging
● Not challenging at all ● Not sure/Not applicable

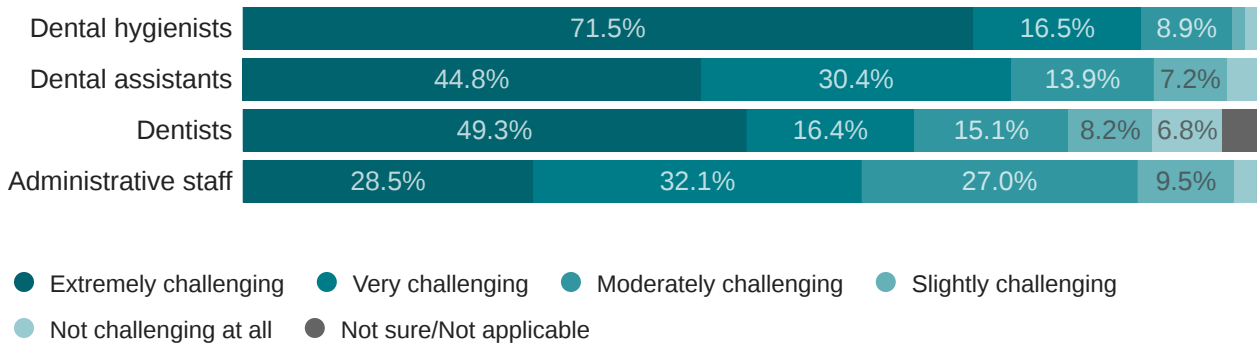
BY PRACTICE SIZE (continued)

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

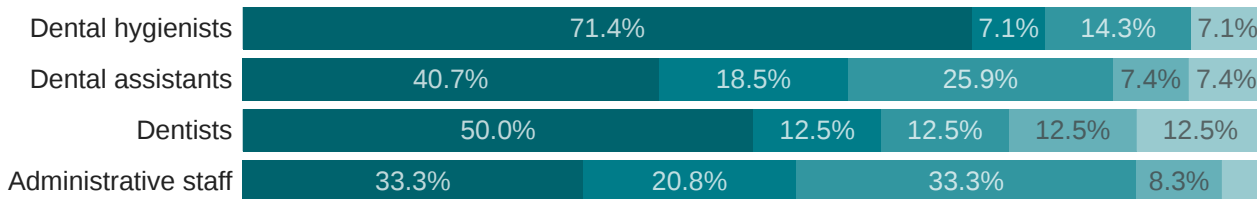
Top 20 Cities

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



● Yes ● No ● Not sure

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



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

BY GEOGRAPHY (continued)

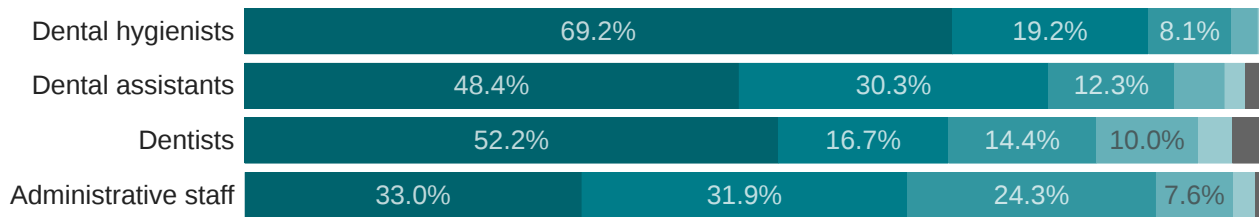
Other Urban

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



● Yes ● No ● Not sure

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



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

BY GEOGRAPHY (continued)

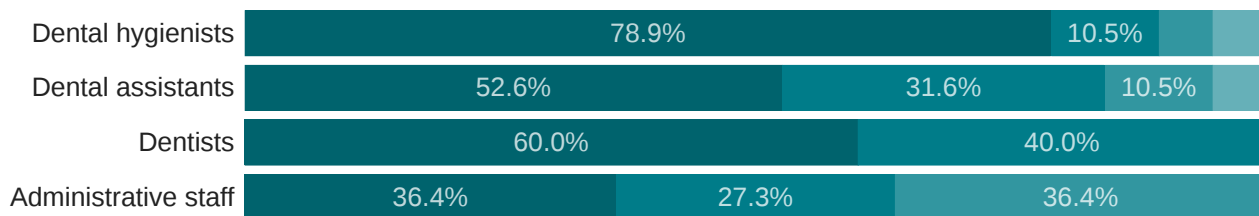
Suburban

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



● Yes ● No ● Not sure

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



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

BY GEOGRAPHY (continued)

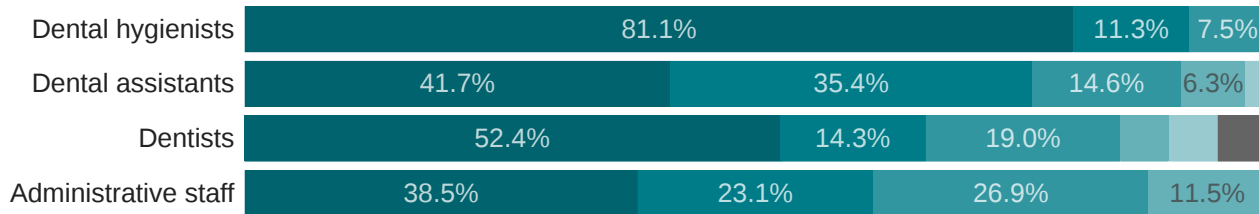
Rural

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



● Yes ● No ● Not sure

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



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

BY SEX

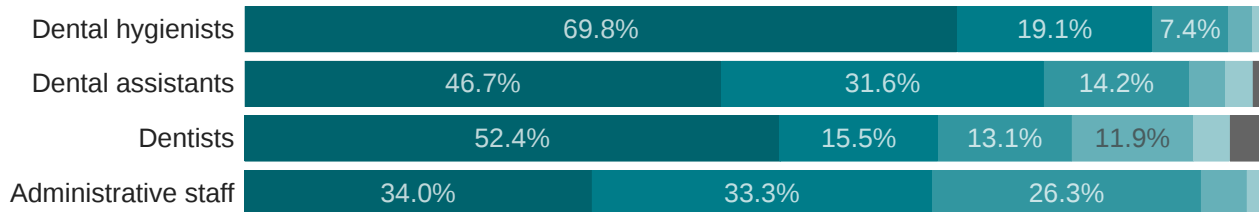
Male

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



● Yes ● No ● Not sure

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



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

BY SEX (continued)

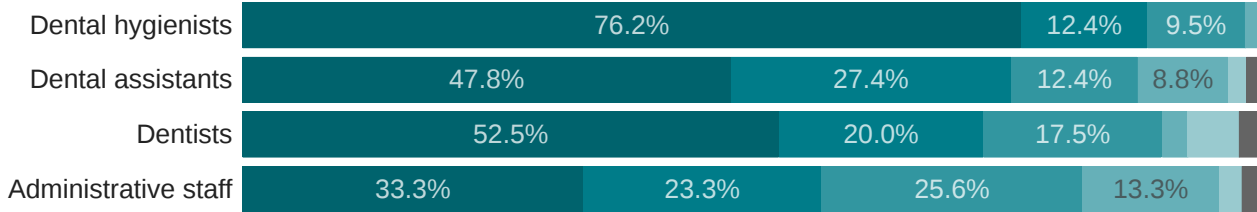
Female

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



● Yes ● No ● Not sure

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



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

BY AGE GROUP

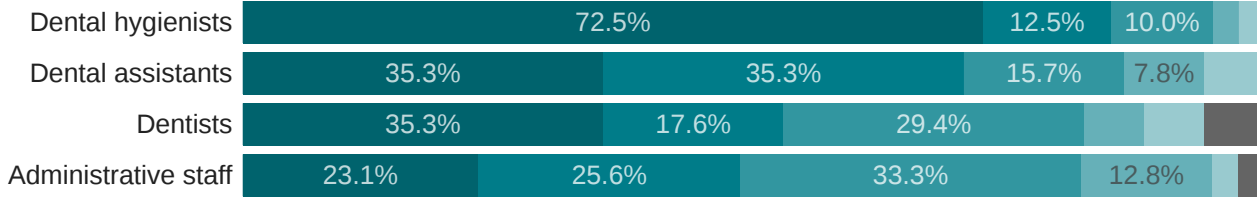
35 to 44

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



● Yes ● No ● Not sure

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



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

BY AGE GROUP (continued)

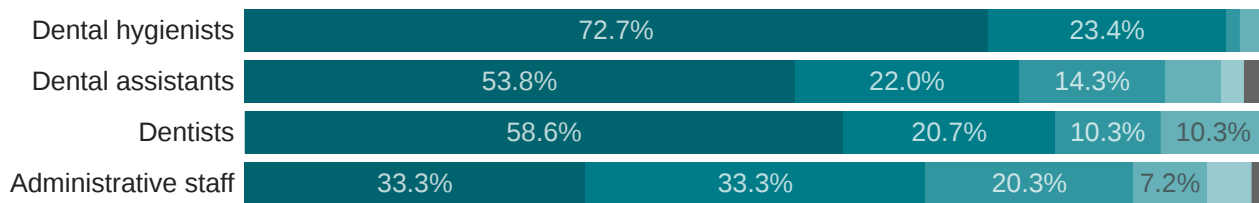
45 to 54

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



● Yes ● No ● Not sure

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



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

BY AGE GROUP (continued)

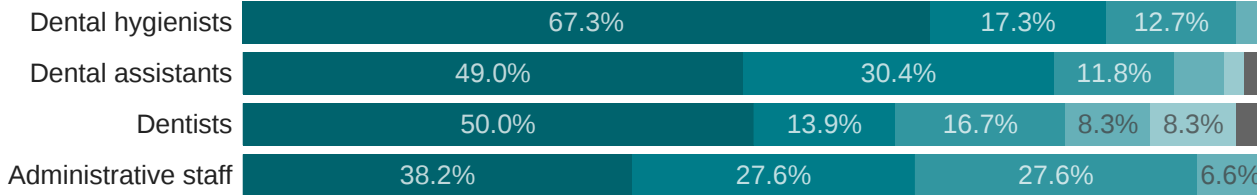
55 to 64

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



● Yes ● No ● Not sure

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



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

BY AGE GROUP (continued)

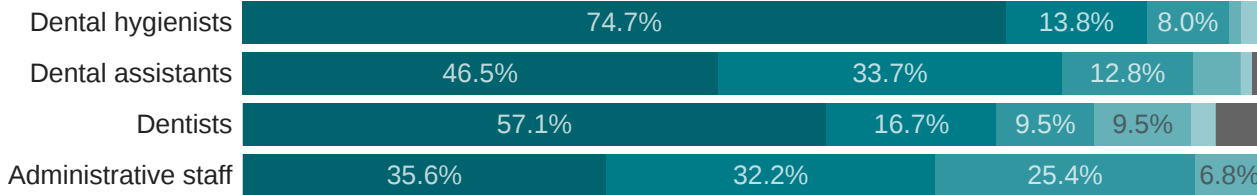
65 or older

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



● Yes ● No ● Not sure

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



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

BY RACE/ETHNICITY

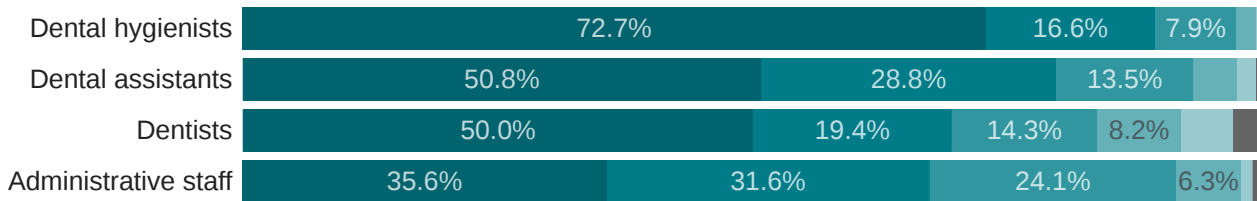
White

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



● Yes ● No ● Not sure

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



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

BY RACE/ETHNICITY (continued)

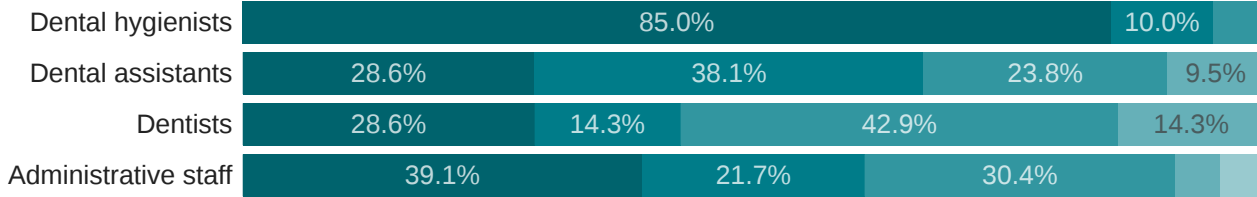
Asian

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



● Yes ● No ● Not sure

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



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

BY RACE/ETHNICITY (continued)

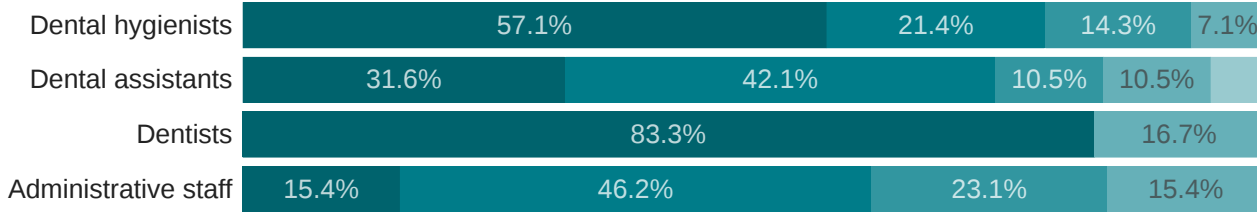
Hispanic

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



● Yes ● No ● Not sure

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



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

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

Number of Responses by Group - Week of March 25, 2024

Ownership Status	Choice Count
Owner dentist (i.e., sole owner, partner, or shareholder)	822
Employee dentist (nonowner)	47
Associate dentist (nonowner)	26
Independent contractor	19
Other, please specify	1

DSO Affiliation	Choice Count
DSO	35
Non-DSO	872

Number of Responses by Group - Week of March 25, 2024 (continued)

Practice Size	Choice Count
Solo dentists	538
2 to 9 dentists	363
Large group (10+ dentists)	14

Geography	Choice Count
Top 20 Cities	69
Other Urban	664
Suburban	48
Rural	133

Sex	Choice Count
Male	620
Female	295

Age Group	Choice Count
<35	12
35-44	111
45-54	221
55-64	285
65+	286

Number of Responses by Group - Week of March 25, 2024 (continued)

Race/Ethnicity	Choice Count
White	713
Asian	70
Hispanic	40
Black	11
Native Hawaiian / Pacific Islander	4
American Indian / Alaska Native	4
Other	13
Unknown	59