

Economic Outlook and Emerging Issues in Dentistry

Insights from Data from Q1 2025

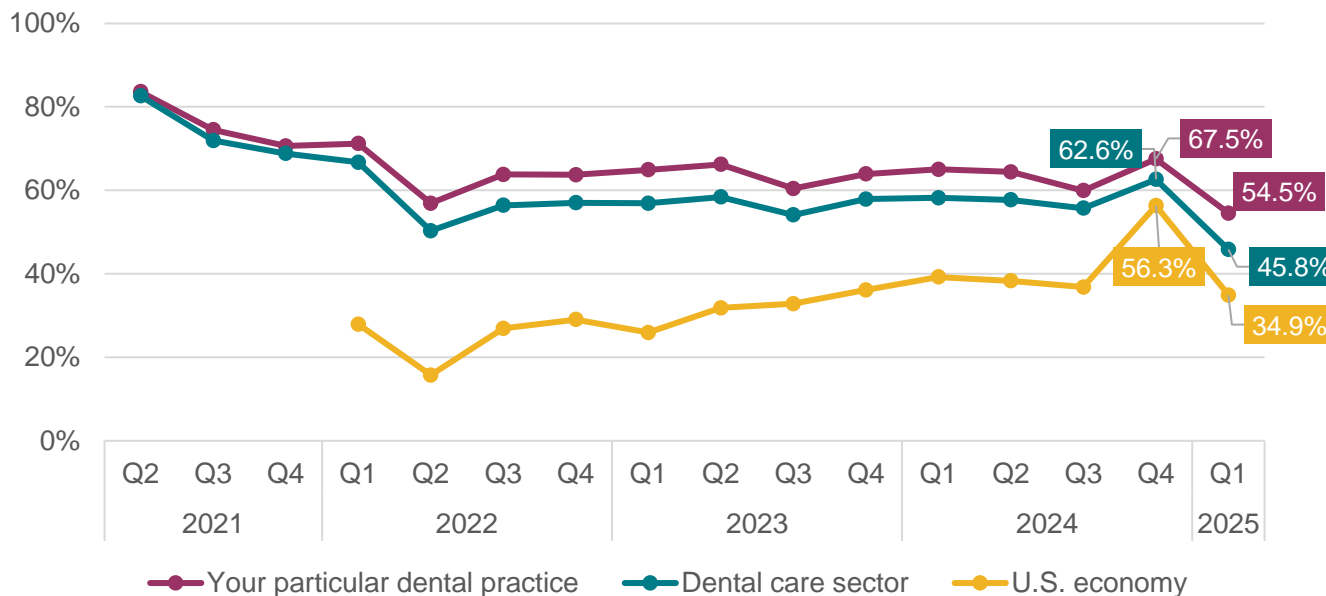
Emerging Issues Polling

- Distributed to nearly 2,500 panel members; 738 dentists in private practice participated in Q1 2025.
- Data was collected March 17 – 23, 2025.
- Core measures: economic confidence, patient wait times, busyness levels, recruitment needs and challenges, recent practice decisions.
- Question of the quarter: acceptance and screening of patients under age 1; COVID-19 infection control measures
- Complete reports with breakdowns available at [ADA.org/HPI](https://ada.org/HPI).

Confidence in the Economy

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

(Percentages indicating “very” or “somewhat” confident.)



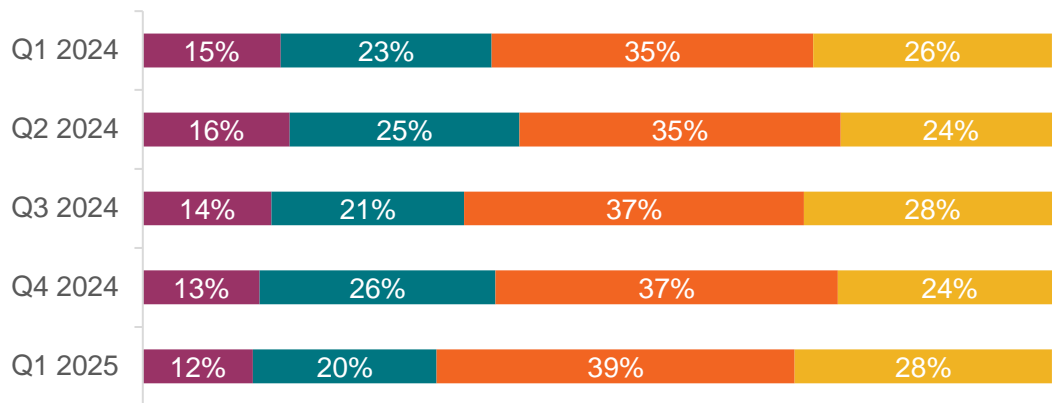
Dentists' economic confidence in the 6-month outlook dropped sharply between Q4 2024 and Q1 2025.

Confidence in the economic conditions in their particular practice and the dental care sector hit the lowest level since HPI began collecting these data.

*See last slide for details about how the wording of this question changed starting Q1 2024.

Busyness

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

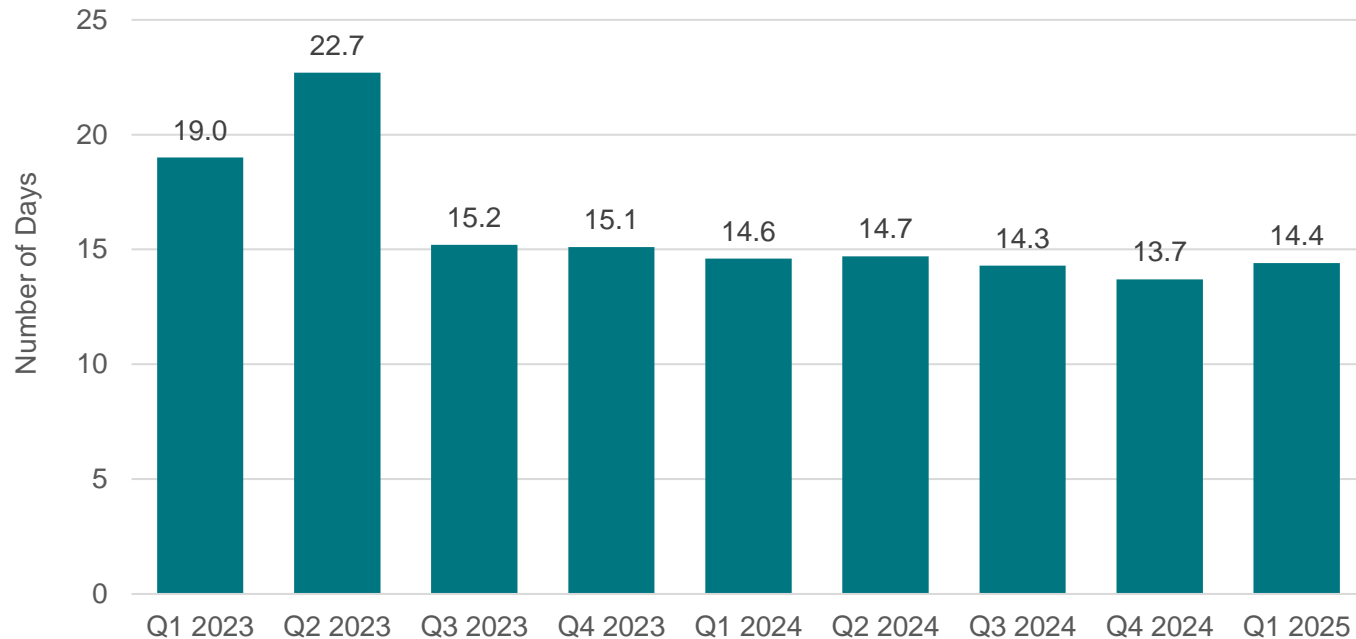


- Too busy to treat all patients requesting care
- Treated all patients requesting care but overworked
- Treated all patients requesting care, not overworked
- Not busy enough, could have treated more patients

In Q1 2025, a smaller proportion of dentists reported treating all patients requesting care but being overworked and a larger proportion indicated they were not busy enough compared to the previous quarter.

Average Wait Times

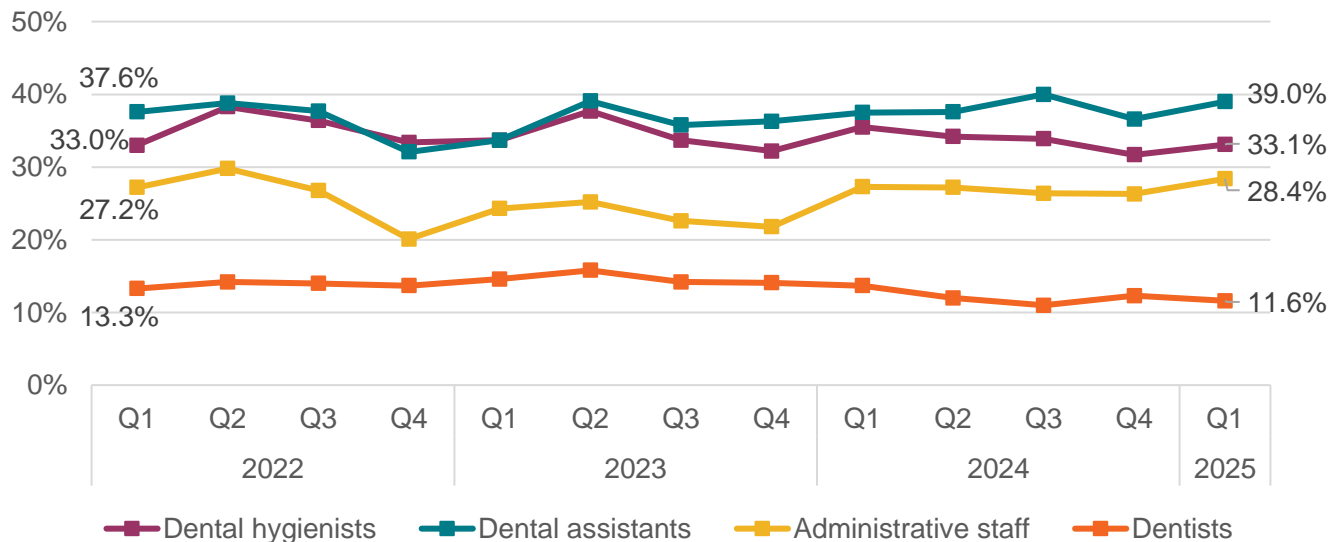
Average New Patient Wait for an Initial Appointment (Among Dentists Accepting New Patients, Excluding Emergencies)



As of Q1 2025, the average wait time for new patients for an initial appointment is around 14 business days, up slightly from the previous quarter.

Dental Team Recruitment

Currently, or at any time during the last 3 months, have you recruited any of the following positions?* (Percentages indicating “Yes.”)

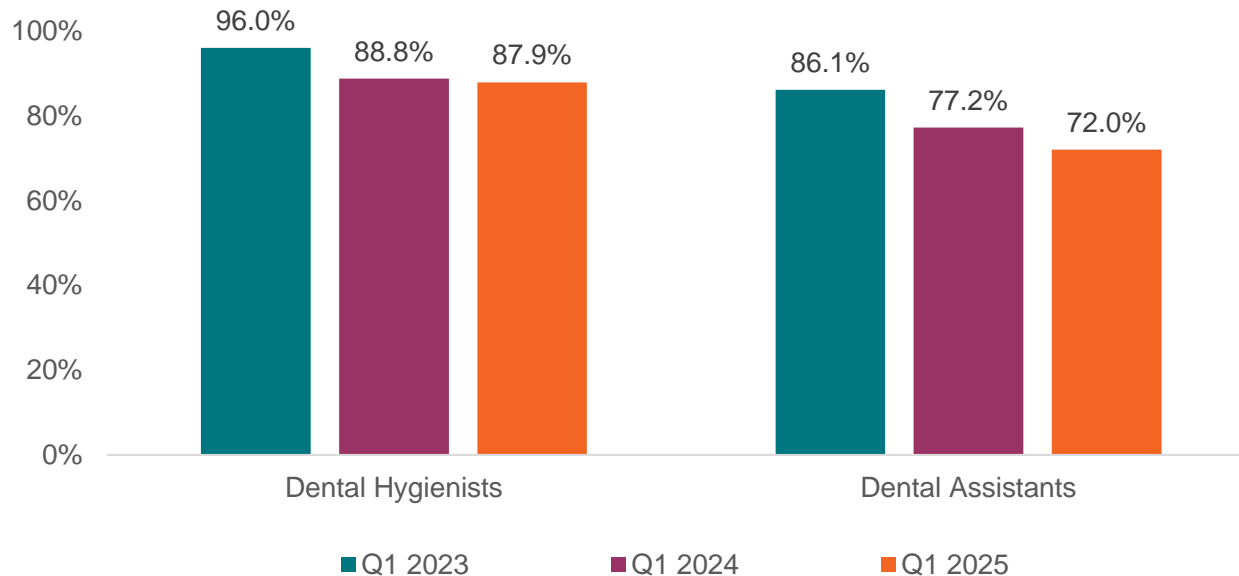


Recruitment needs in Q1 2025 are nearly identical to those in Q1 2022, and up slightly from recruitment needs of the previous quarter.

*See last slide for details about how the wording of this question changed starting Q1 2024.

Challenges Recruiting

How challenging has it been to recruit the position(s) below? (Among dentists recruiting in past 3 months; percentage indicating “Extremely Challenging” and “Very Challenging”)

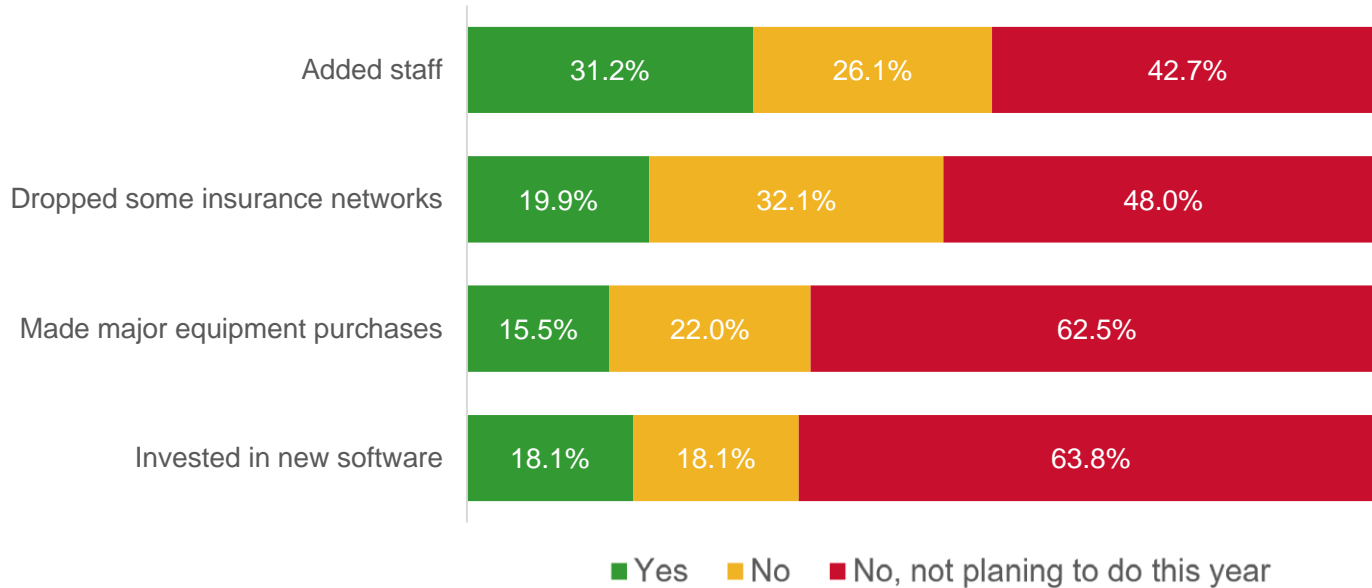


Among dentists who were recruiting at the time of the survey or in the prior 3 months, perceived difficulty in recruiting has slightly decreased in Q1 2025 when compared to the previous two years; more so for dental assistants than dental hygienists.

*See last slide for details about how the wording of this question changed starting Q1 2024.

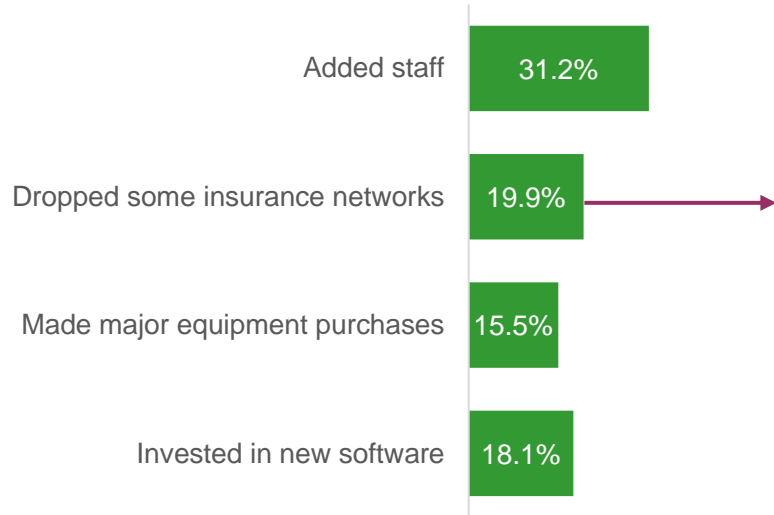
Recent Practice Decisions

[Owner dentists] Since the beginning of 2025, have you done any of the following in your dental practice?

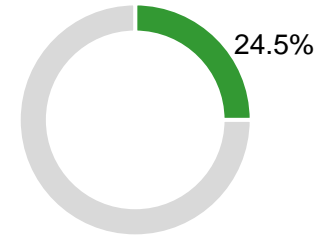


Recent Practice Decisions

[Owner dentists] Since the beginning of 2025, have you done any of the following in your practice? (Percent 'Yes')



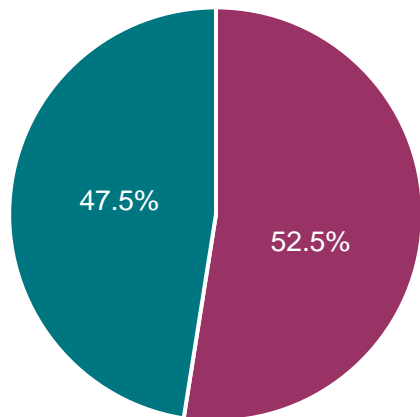
Approximately what percentage of the patient base were in the insurance networks your practice dropped out of since the beginning of 2025? (Out of 19.9% who dropped some insurance networks)



Among the 19.9% of dentists who have dropped out of some insurance networks since the beginning of 2025, one-quarter of their patient base on average were in the insurance networks that were dropped.

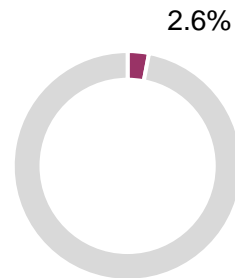
Acceptance of Patients Aged 1 or Younger

Do you currently accept appointments for children aged 1 year or younger?*



■ Yes ■ No

[If accept appointments] What percentage of your patients are aged 1 year or younger?

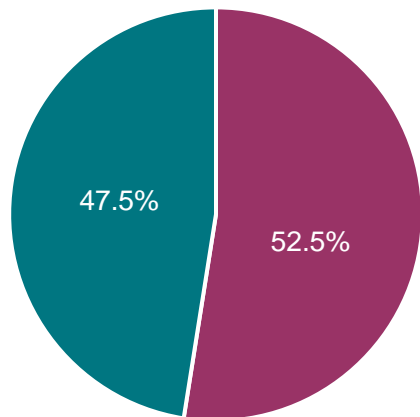


More than half of responding dentists said that they accept appointments for patients aged 1 year or younger. Among these dentists, these patients make up around 3% of their patient volume.

*Responses are for general practitioner dentists only.

Screening of Patients Aged 1 or Younger

Do you currently accept appointments for children aged 1 year or younger?*



■ Yes ■ No

[If accept appointments] Do you perform the "screening knee to knee examination" on patients aged 1 year or younger? (% yes)

78.9%

[If perform exam] After performing the screening knee to knee exam on patients aged 1 year or younger, have you ever referred them to a pediatric dentist for treatment? (% yes)

67.7%

*Responses are for general practitioner dentists only.

COVID-19 Infection Control Measures

	As a result of the COVID-19 pandemic, did your practice begin to	[If selected in previous question] Does your practice currently do the following?
Disinfect frequently touched surfaces and materials?	79.4%	82.6%
Use air purifiers/filters in any of its operatories?	60.7%	83.6%
Use physical protection in the practice?	60.3%	59.4%
Check staff temperatures at the beginning of their shift?	60.0%	5.3%
Require staff to use face shields when treating patients?	56.8%	30.9%
Require staff to use N95 or level 3 surgical masks when treating patients?	73.4%	58.6%
Encourage distance between patients?	65.1%	18.3%
Screen or interview patients for COVID-19 before appointment?	73.2%	39.9%
Check patient temperatures before dental treatment?	64.7%	8.1%
Provide face masks or coverings to patients?	58.5%	46.1%
Use teledentistry?	20.1%	60.0%

Key Takeaways

Economic Confidence: In Q1 2025, dentists' confidence in the 6-month outlook of their dental practice, the dental care sector, and the U.S. economy in general declined sharply compared to last quarter. The Q4 2024 results represented the highest point of dentist confidence in the U.S. economy since HPI started asking this question while the Q1 2025 results represent the lowest point since Q3 2023. HPI will continue to monitor this trend.

Recruitment Needs: The number of dentists reporting that they are actively recruiting dental hygienists and dental assistants is nearly identical to the number of dentists reporting the same in the beginning of 2022. Recruitment needs have been very steady over the past three years. Most recruiting dentists continue to say recruitment is very or extremely challenging, though this figure has been declining.

Pediatric Screening: Around half of responding general practitioner dentists (52.5%) reported that they accept patients aged 1 year and younger. Among these dentists, more than three-quarters (78.9%) said that they perform knee-to-knee examinations on these patients. Of those dentists performing knee-to-knee examinations, around two-thirds (67.7%) said they have referred the patients to pediatric dentists.

COVID-19 Infection Control: With the exception of use of teledentistry, at least half of dentists reported using a variety of COVID-19 infection control measures when the pandemic began. As of Q1 2025, use of some infection control measures dropped considerably, such as checking staff temperatures (still used by 5.3% of the 60.0% of practices that began this measure) and encouraging distance between patients (used by 18.3% of 65.1% of practices that began this measure). Other measures remained in place in Q1 by practices that introduced them, such as use of air filters (still used by 83.6% of 60.7% of practices that began this measure) and teledentistry (still in use by 60.0% of the 20.1% of practices that began).

Thank you!

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Question Changes

Starting Q1 2024, the following questions from the 2022-23 panel have been **modified**:

- *“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?**”*