HPI Health Policy Institute Economic Outlook and Emerging Issues in Dentistry

ADA American Dental Association®

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Results for the questions below are reported in two sections:

- All Respondents Combined includes overall results for all respondents. ٠
- Select Breakout of Results includes results by ownership status, DSO affiliation, practice size, geography, sex, years . experience, age, & race/ethnicity.

	All Respondents Combined	Select Breakouts of Results
Looking ahead to the next six months, how confident are you in the recovery of: (Your particular dental practice, The dental care sector in general, The U.S. economy)	3	8
How full was you dental practice's appointment schedule last week?	3	16
Which of the following factors prevented your dental practice's appointment schedule from reaching 100% last week? (Patient cancellations, Not enough patients making appointments, Trouble filling vacant staff positions, COVID safety protocols, Other)	4	16
[Owners only] Currently, how many business days does the average <i>patient of record</i> have to wait for an appointment (excluding emergencies)?	5	32
Have you recently or are you currently recruiting any of the following positions in your dental practice? (Dental hygienists, Dental assistants, Dentists, Administrative staff)	6	36
How challenging has it been to recruit the position(s) below? (Dental hygienists, Dental assistants, Dentists, Administrative staff)	6	36
[Owner dentists] Does your practice ever bill medical insurance to cover dental procedures for your patients?	7	54
If yes, please estimate for what share of your patients.	7	56
If no, why not?	7	



About This Study

To better understand the economic and operational conditions in dental practices and public health clinics over time, and to measure the impact of the COVID-19 pandemic and other emerging issues in dentistry, the ADA Health Policy Institute launched a tracking poll in January 2022. For the initial wave over the week of January 17, 2022, we invited nearly 80,000 dentists from across the U.S. to join a panel in which they will complete a survey once a month; over 3,000 have opted to participate.

The survey for the week of September 11, 2023 was sent to 3,301 panel members; 1,039 responded, for an adjusted response rate (excluding undeliverable email addresses) of 31.5%. 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.

Below are the results from the latest wave for dentists working in private dental practices. The report includes breakouts 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.

This report was published in September 2023 by the American Dental Association's Health Policy Institute.

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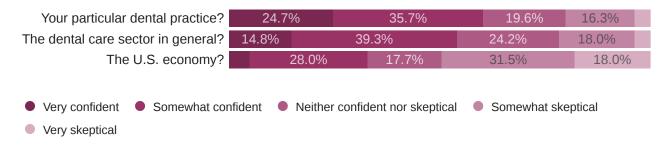
For more information on other publications, products and services, please visit our website, ADA.org/HPI.



All Respondents

Looking ahead to the next six months, how confident are you in the recovery of:

974 Responses



How full was your dental practice's appointment schedule last week?

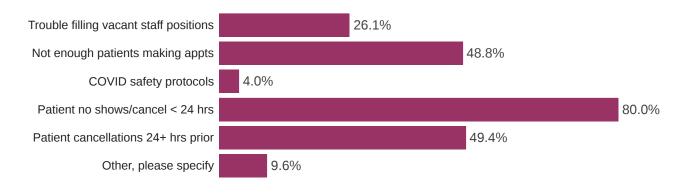


Mean % of appointment schedule filled

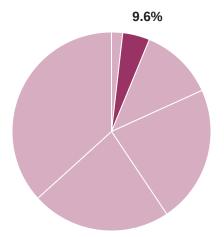


Which of the following factors prevented your dental practice's appointment schedule from reaching 100% last week? (Select all that apply.)

834 Responses



80 respondents (9.6%) selected "other, please specify." Their responses are categorized below.



Other, please specify:	Percentage of Responses
BEGINNING OF SCHOOL / SEASONAL LOW	25.0%
STAFF OUT ON VACATION / LEAVE	18.8%
PATIENTS AWAY / OFFICE CLOSED FOR BREAK OR HOLIDAY	8.8%
DROPPED DENTAL PLAN / LOW REIMBURSEMENT / INSURANCE ISSUES	8.8%
STAFF OUT WITH COVID/QUARANTINE/OTHER ILLNESS	7.5%
BAD ECONOMIC CONDITIONS	7.5%
PATIENTS POSTPONING TREATMENT DUE TO COST	6.3%
PATIENT FEAR/HESITANCY TO VISIT DENTIST	3.8%
INEXPERIENCED / INEFFICIENT / DISENGAGED STAFF	3.8%
PROFESSIONAL DEVELOPMENT / ATTENDING DENTAL MEETINGS	2.5%
TRAINING / CREDENTIALING OF NEW STAFF	1.3%
STAFF SHORTAGES / REDUCED HOURS	1.3%
LOSING EXISTING PATIENTS	1.3%
HAPPY WITH CURRENT VOLUME	1.3%
MISCELLANEOUS	8.8%



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

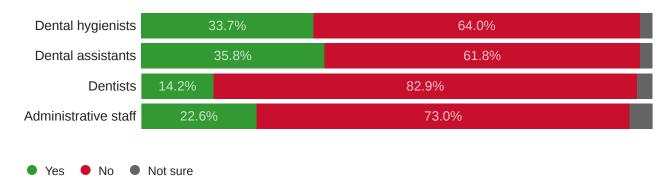


• Mean number of days

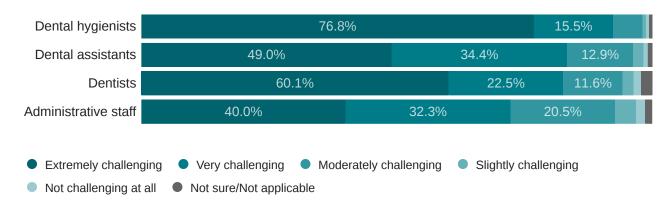


Have you recently or are you currently recruiting any of the following positions in your dental practice?

974 Responses



How challenging has it been to recruit the position(s) below?



577 Responses



Does your practice ever bill medical insurance to cover dental procedures for your patients?

886 Responses Yes [21%, 187] No [79%, 699]

If yes, please estimate for what share of your patients.

187 Responses



If no, why not?

620 Responses

Field	Percentage of Responses
NOT NECESSARY / WE PROVIDE ONLY DENTAL SERVICES	35.5%
TOO COMPLICATED, TIME-CONSUMING, ADMINISTRATIVE BURDEN IS NOT WORTH THE EFFORT	27.7%
LACK OF TRAINING, QUALIFIED STAFF, SOFTWARE	20.2%
REIMBURSMENT WILL BE DENIED / SIGNIFICANT PAYMENT DELAYS	10.3%
UNFAMILIAR WITH MEDICAL PROCEDURE CODES, SERVICES COVERED, BILLING PROCESS	10.2%
FEE FOR SERVICE / NOT IN-NETWORK WITH ANY INSURANCE PLANS	3.1%
WAS NOT AWARE IT IS AN OPTION	2.7%
PATIENT MAY SUBMIT MEDICAL CLAIM FOR SERVICES	1.9%
NOT INTERESTED	1.0%
PATIENT DEDUCTIBLES ARE HIGH, LIKELY NOT MET	0.8%
I'M NOT SURE	0.8%
SPECIALTY / MEDICAL-RELATED SERVICES ARE REFERRED OUT	0.2%
MISCELLANEOUS	1.8%



Economic Confidence

BY OWNERSHIP STATUS

Looking ahead to the next six months, how confident are you in the recovery of:

Owner

Your particular dental practice?	24.4	1%	36.2%		19.6%	16.1%
The dental care sector in general?	14.9%	38.9%			23.9%	18.3%
The U.S. economy?		27.5% 17.2%			32.4%	18.2%
 Very confident Somewhat con Very skeptical 	fident 📕	Neither conf	ident nor skeptid	cal 🗨	Somewhat s	skeptical

Non-owner

Your particular dental practice?	27.	2.6%		29.9%		18	8.4%
The dental care sector in general?	13.6%	43.2%		27.3%		14.8%	
The U.S. economy?		33.0%		22.7%	22.7%		15.9%



BY DSO AFFILIATION

Looking ahead to the next six months, how confident are you in the recovery of:

DSO

Your particular dental practice?	25.0% 37.5%		37.5%	16.1%	16.1%
The dental care sector in general?	16.1%	.% 35.7%		30.4%	16.1%
The U.S. economy?	8.9%	30.4% 17.9%		26.8%	16.1%
 Very confident Somewhat cor Very skeptical 	nfident (Neither confident r	or skeptical	Somewhat sk	eptical

Non-DSO

Your particular dental practice?	24.60	%	35.6%		19.8%)
The dental care sector in general?	14.7%	39.5%			23.9%	18.1%	
The U.S. economy?		27.9%	17.6%		31.8%	18.1	.%



BY PRACTICE SIZE

Looking ahead to the next six months, how confident are you in the recovery of:

Solo dentists

Your particular dental practice?	21.5%	33.2%	21.8%	19.6%
The dental care sector in general?	13.6%	35.2%	25.7%	21.6%
The U.S. economy?	23.3%	19.0%	33.9%	20.0%
 Very confident Somewhat con Very skeptical 	nfident 🔍 Neithe	er confident nor ske	ptical 🔍 Somewhat s	keptical

2 to 9 dentists

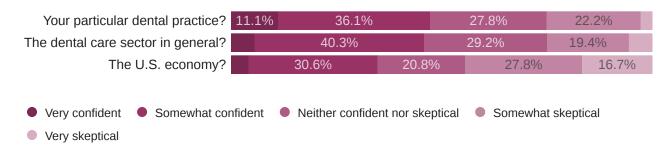
Your particular dental practice?	30.1	30.1%		39.2%		16.0%	11.0%
The dental care sector in general?	16.3%	46.0%			22.3%	12.1%	
The U.S. economy?		35.5%		16.0%	27	7.8%	14.9%



BY GEOGRAPHY

Looking ahead to the next six months, how confident are you in the recovery of:

Top 20 cities



Other urban

Your particular dental practice?	25.1 ⁰	35.4%		18.6%	16.6%
The dental care sector in general?	15.3%	39.1%		39.1% 24.5%	
The U.S. economy?		28.3%	18.3%	31.3%	16.9%

Suburban

Your particular dental practice?	30	.6% 40.8%		14.3%		14.3%
The dental care sector in general?	14.3%	44.9%		22.4	%	18.4%
The U.S. economy?		36.7%	10.2%	30.6%		20.4%

Rural

Your particular dental practice?	27.5%	34.6%	22.2%	ó	13.1%
The dental care sector in general?	17.0%	37.9%	21.6%	20	.3%
The U.S. economy?	22.9%	15.7%	34.0%	2	2.9%



BY SEX

Looking ahead to the next six months, how confident are you in the recovery of:

Male

Your particular dental practice?	25.9%		33.0%	20.1%	17.5%
The dental care sector in general?	15.4%		37.4%	25.7%	17.5%
The U.S. economy?	2	24.8% 17.2%		32.9%	19.9%
 Very confident Somewhat cor Very skeptical 	nfident	Neither cor	nfident nor skeptica	I 🛛 Somewhat sł	ceptical

Female

Your particular dental practice?	22.2%	% 41.1%		18.7%	1	3.9%
The dental care sector in general?	13.6%	43.2%		21.1%	18	3.9%
The U.S. economy?		34.7%	18.6%	28.7%		13.9%



BY YEARS EXPERIENCE

Looking ahead to the next six months, how confident are you in the recovery of:

New dentists (graduated 2013 - 2022)

Your particular dental practice?	23.6%	43.6%		16.4%	16.4%		
The dental care sector in general?	12.7%	% 47.3%		47.3%		29.1%	10.9%
The U.S. economy?	30.9%	30.9% 38.2%			.3%		
 Very confident Somewhat cor Very skeptical 	nfident 🔎 Neithe	r confident nor skeptical	Somev	vhat skepti	cal		

Established dentists (graduated before 2013)

Your particular dental practice?	24.79	% 35.2%			19.8%		16.3%
The dental care sector in general?	14.9%	38.8%			23.9%	1	L8.4%
The U.S. economy?		27.9%	16.4%		31.8%		18.9%



BY AGE GROUP

Looking ahead to the next six months, how confident are you in the recovery of:

35 to 44

Your particular dental practice?	25.2% 41.7%		20.1%		11.5%	
The dental care sector in general?	15.8%	38.1%		29.5%		15.1%
The U.S. economy?		33.1%	17.3%		34.5%	11.5%
 Very confident Somewhat cor Very skeptical 	nfident	Neither confiden	t nor skeptical	Sor	newhat skepti	cal

45 to 54

Your particular dental practice?	24.5%	i% 37.1%			17.5%	17.0%
The dental care sector in general?	16.1%	40.4%			18.7%	20.4%
The U.S. economy?	3	0.0%	17.0%		30.0%	19.1%

55 to 64

Your particular dental practice?	24.3	% 36.6%			19.7%	16.6%
The dental care sector in general?	14.2%	4	0.3%		26.2%	16.3%
The U.S. economy?		27.4%	17.2%	4	31.1%	19.7%

65 or older

Your particular dental practice?	24.7%	28.9%	21.7%	18.6%
The dental care sector in general?	14.1%	36.5%	24.0%	20.2%
The U.S. economy?	24.0%	17.5%	32.3%	19.4%



BY RACE/ETHNICITY

Looking ahead to the next six months, how confident are you in the recovery of:

White

Your particular dental practice?	27.2%	35.4%	17.8%	15.9%
The dental care sector in general?	16.3% 39.6%		23.1%	17.3%
The U.S. economy?	29.1%	16.3%	31.8%	17.7%
 Very confident Somewhat cor Very skeptical 	nfident 🔎 Neither c	onfident nor skeptical	Somewhat ske	eptical

Asian

Your particular dental practice? 7.4	% 43.2	.%	30.9%	13.6	%
The dental care sector in general? 7.4	% 38.3%	b 29	29.6%		
The U.S. economy?	23.5%	23.5% 29.6% 30.9%		9%	9.9%

Hispanic

Your particular dental practice?	26.2	% 34.4%		% 34.4%		19.7%
The dental care sector in general?	14.8%	44.3%		44.3% 23.0%		16.4%
The U.S. economy?		37.7%		14.8%	21.3%	23.0%



Appointment Schedule

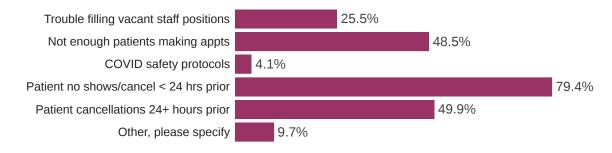
BY OWNERSHIP STATUS

Owner

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





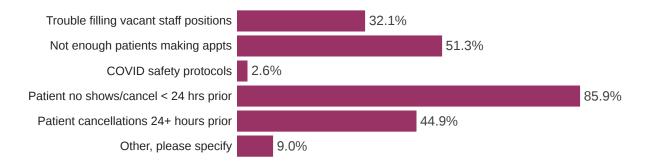
BY OWNERSHIP STATUS (continued)

Non-owner

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





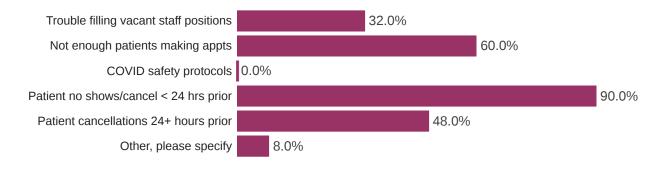
BY DSO AFFILIATION

DSO

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





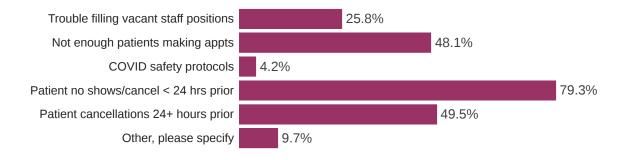
BY DSO AFFILIATION (continued)

Non-DSO

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





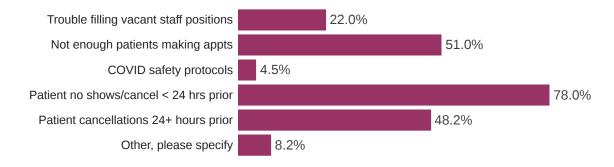
BY PRACTICE SIZE

Solo dentists

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





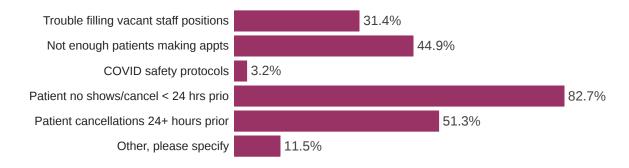
BY PRACTICE SIZE (continued)

2 to 9 dentists

How full was your dental practice's appointment schedule last week?



Mean % of schedule filled





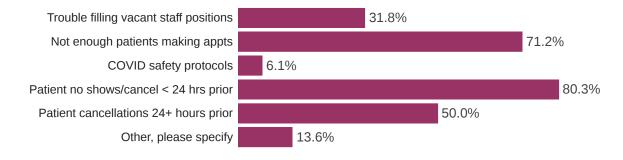
BY GEOGRAPHY

Top 20 cities

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





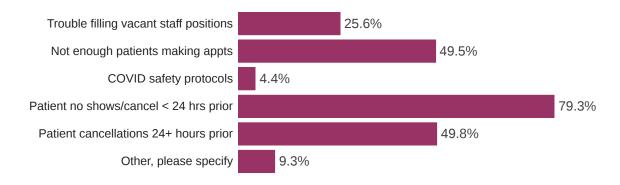
BY GEOGRAPHY (continued)

Other Urban

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





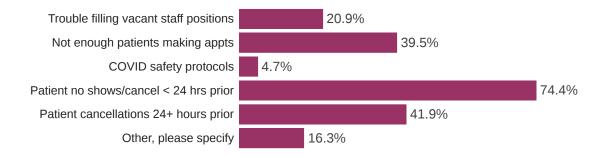
BY GEOGRAPHY (continued)

Suburban

How full was your dental practice's appointment schedule last week?



Mean % of schedule filled





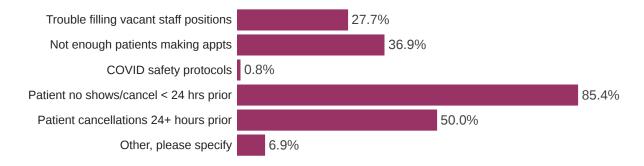
BY GEOGRAPHY (continued)

Rural

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





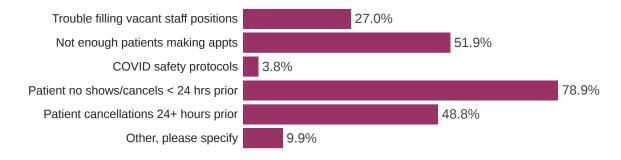
BY SEX

Male

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





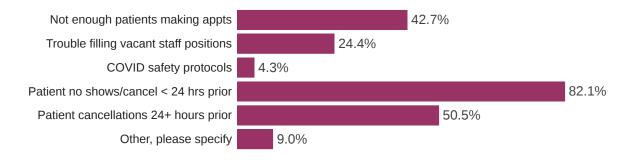
BY SEX (continued)

Female

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





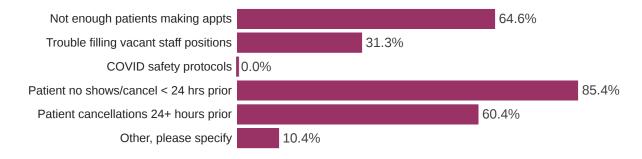
BY YEARS EXPERIENCE

New dentists (graduated 2013 - 2022)

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





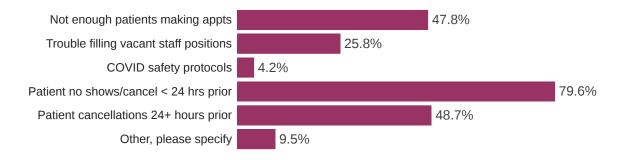
BY YEARS EXPERIENCE (continued)

Established dentists (graduated before 2013)

How full was your dental practice's appointment schedule last week?



• Mean % of schedule filled





BY AGE



How full was your dental practice's appointment schedule last week?

	35-44	45-54	55-64	65+
Not enough patients trying to make appointments	49.6%	50.2%	44.7%	51.8%
Trouble filling vacant staff positions	24.8%	25.6%	25.1%	28.6%
COVID safety protocols are limiting the capacity	1.7%	2.4%	3.3%	7.7%
Patient no shows/ cancellations < 24 hrs	85.5%	87.4%	78.9%	70.5%
Patient cancellations 24+ hours prior	57.3%	53.1%	46.5%	43.6%
Other, please specify	5.1%	8.2%	9.8%	12.7%



BY RACE/ETHNICITY

How full was your dental practice's appointment schedule last week?



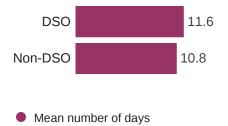
Field	White	Asian	Hispanic
Not enough patients trying to make appointments	45.9%	61.4%	51.0%
Trouble filling vacant staff positions	24.6%	31.4%	33.3%
COVID safety protocols are limiting the capacity	3.2%	12.9%	2.0%
Patient no shows/cancellations < 24 hrs	79.0%	78.6%	82.4%
Patient cancellations 24+ hours prior	48.3%	57.1%	52.9%
Other, please specify	10.6%	1.4%	11.8%



Patient Wait Times

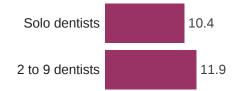
BY DSO AFFILIATION

[Owners only] Currently, how many business days does the average *patient of record* have to wait for an appointment (excluding emergencies)?



BY PRACTICE SIZE

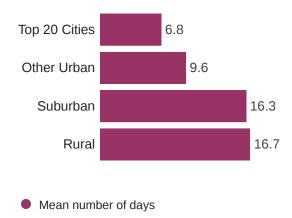
[Owners only] Currently, how many business days does the average *patient of record* have to wait for an appointment (excluding emergencies)?





BY GEOGRAPHY

[Owners only] Currently, how many business days does the average *patient of record* have to wait for an appointment (excluding emergencies)?



BY SEX

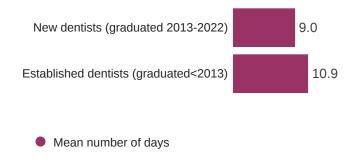
[Owners only] Currently, how many business days does the average *patient of record* have to wait for an appointment (excluding emergencies)?





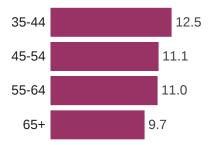
BY YEARS EXPERIENCE

[Owners only] Currently, how many business days does the average *patient of record* have to wait for an appointment (excluding emergencies)?



BY AGE GROUP

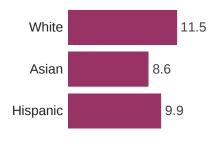
[Owners only] Currently, how many business days does the average *patient of record* have to wait for an appointment (excluding emergencies)?





BY RACE / ETHNICITY

[Owners only] Currently, how many business days does the average *patient of record* have to wait for an appointment (excluding emergencies)?



• Mean number of days



Staff Recruitment

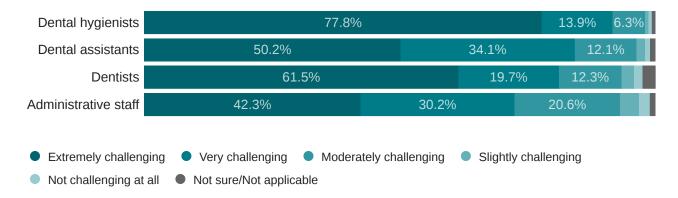
BY OWNERSHIP STATUS

Owner dentists

Have you recently or are you currently recruiting any of the following positions in your dental practice?



How challenging has it been to recruit the position(s) below?



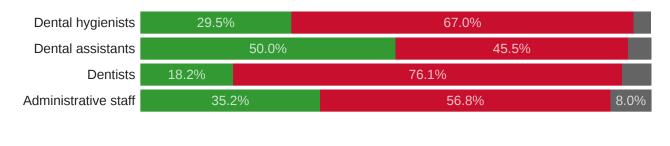


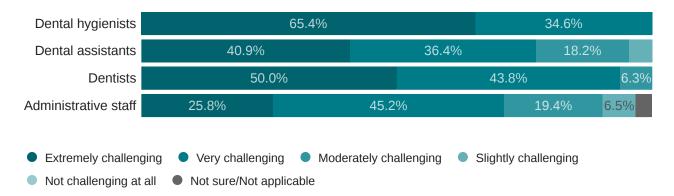
BY OWNERSHIP STATUS (continued)

Non-owner dentists

Yes

Have you recently or are you currently recruiting any of the following positions in your dental practice?







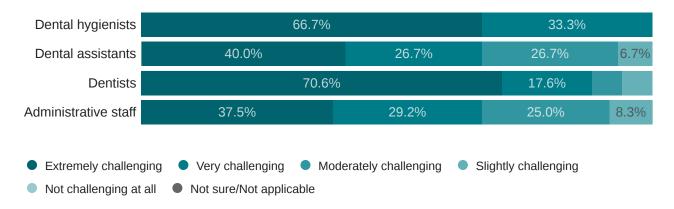
BY DSO AFFILIATION

DSO

Have you recently or are you currently recruiting any of the following positions in your dental practice?



Yes • No • Not sure



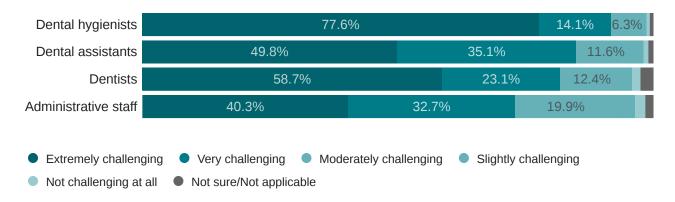


BY DSO AFFILIATION (continued)

Non-DSO

Have you recently or are you currently recruiting any of the following positions in your dental practice?







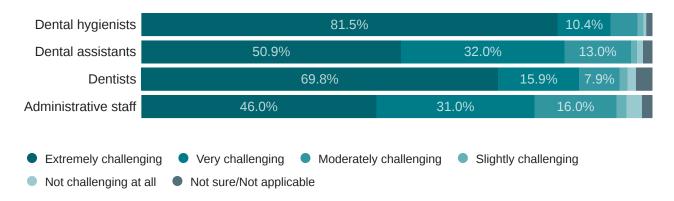
Yes

BY PRACTICE SIZE

Solo dentists

Have you recently or are you currently recruiting any of the following positions in your dental practice?



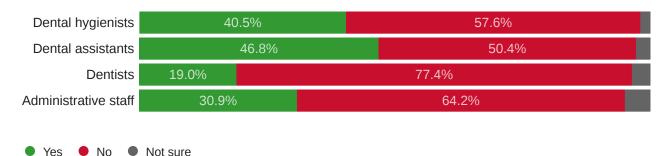


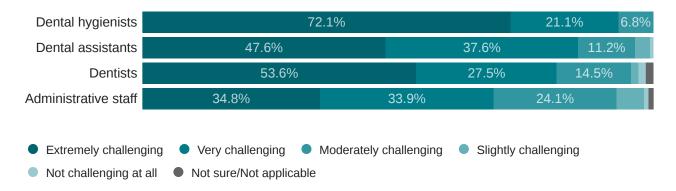


BY PRACTICE SIZE (continued)

2 to 9 dentists

Have you recently or are you currently recruiting any of the following positions in your dental practice?



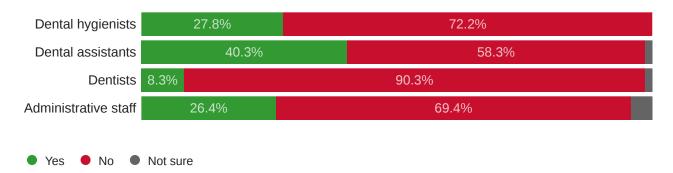


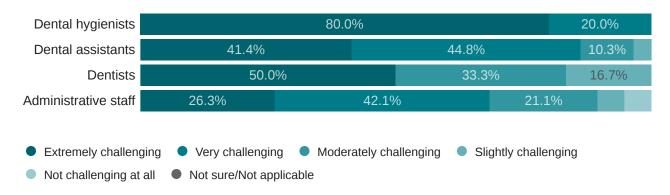


BY GEOGRAPHY

Top 20 Cities

Have you recently or are you currently recruiting any of the following positions in your dental practice?



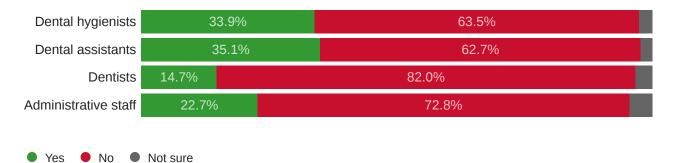


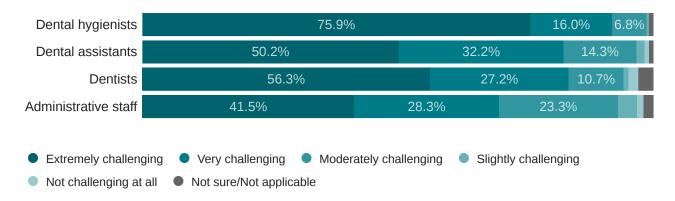


BY GEOGRAPHY (continued)

Other Urban

Have you recently or are you currently recruiting any of the following positions in your dental practice?



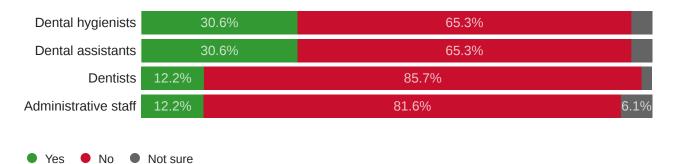


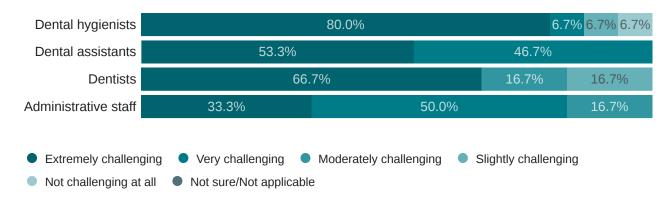


BY GEOGRAPHY (continued)

Suburban

Have you recently or are you currently recruiting any of the following positions in your dental practice?





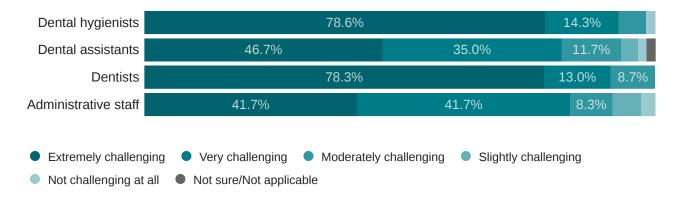


BY GEOGRAPHY (continued)

Rural

Have you recently or are you currently recruiting any of the following positions in your dental practice?



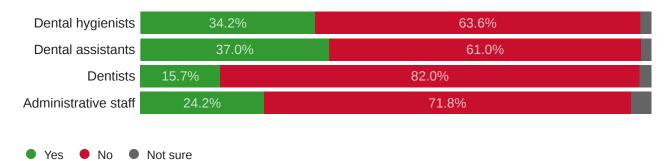


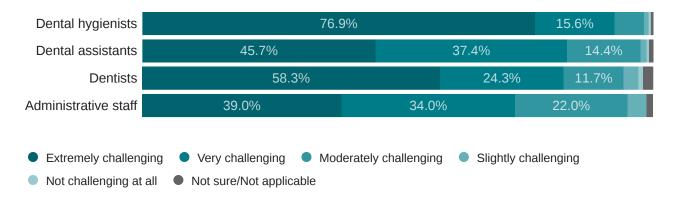


BY SEX

Male

Have you recently or are you currently recruiting any of the following positions in your dental practice?



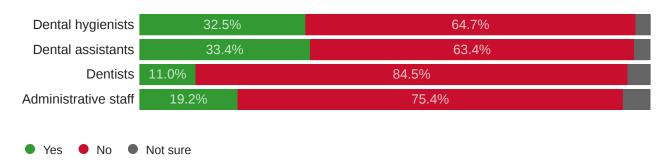


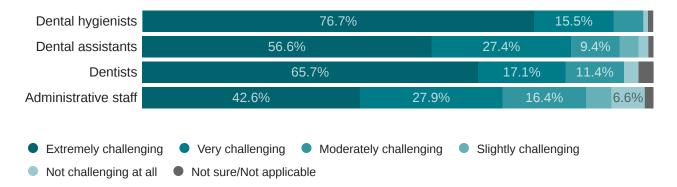


BY SEX (continued)

Female

Have you recently or are you currently recruiting any of the following positions in your dental practice?



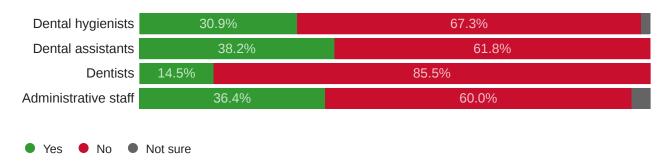


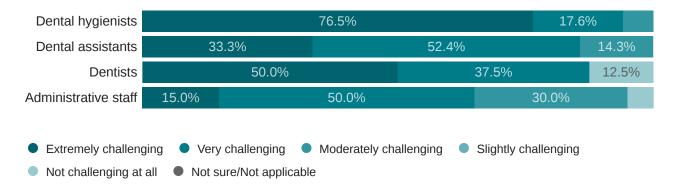


BY YEARS EXPERIENCE

New Dentists (graduated 2013 - 2022)

Have you recently or are you currently recruiting any of the following positions in your dental practice?



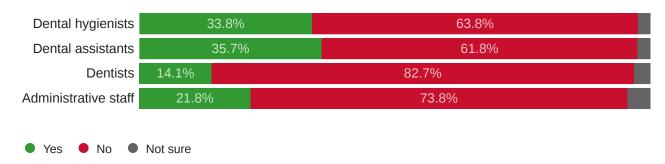


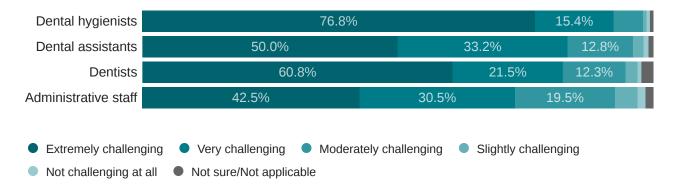


BY YEARS EXPERIENCE (continued)

Established Dentists (graduated before 2013)

Have you recently or are you currently recruiting any of the following positions in your dental practice?



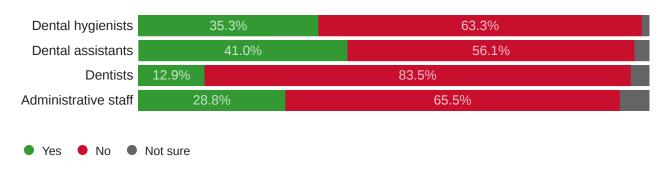


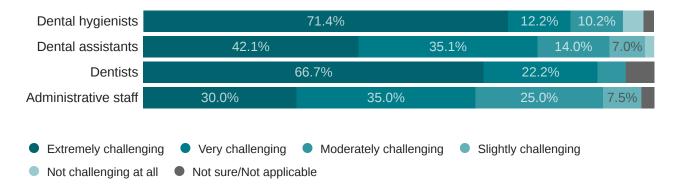


BY AGE GROUP

35 to 44

Have you recently or are you currently recruiting any of the following positions in your dental practice?



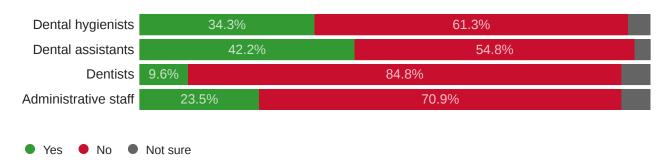


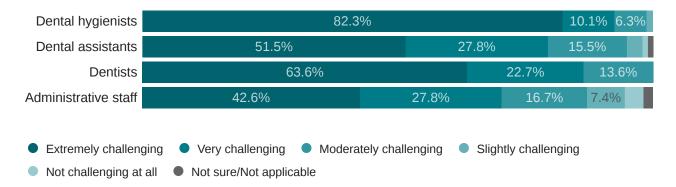


BY AGE GROUP (continued)

45 to 54

Have you recently or are you currently recruiting any of the following positions in your dental practice?





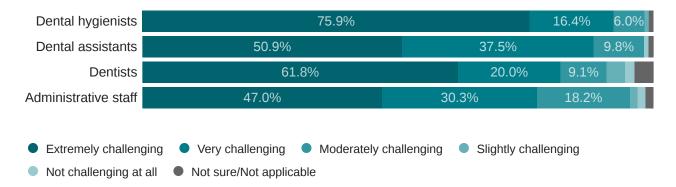


BY AGE GROUP (continued)

55 to 64

Have you recently or are you currently recruiting any of the following positions in your dental practice?





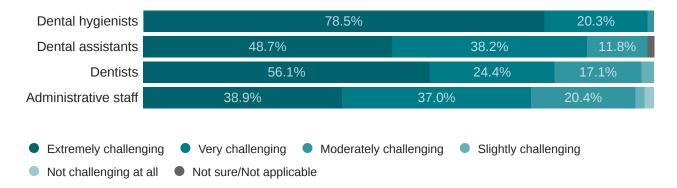


BY AGE GROUP (continued)

65 or older

Have you recently or are you currently recruiting any of the following positions in your dental practice?







Questions of the Week Billing Medical Insurance

[Owner dentists] Does your practice ever bill medical insurance to cover dental procedures for your patients?

BY DSO AFFILIATION



BY PRACTICE SIZE

Solo dentists	20.1%	79.9%
2 to 9 dentists	22.0%	78.0%

BY GEOGRAPHY





[Owner dentists] Does your practice ever bill medical insurance to cover dental procedures for your patients? (continued)

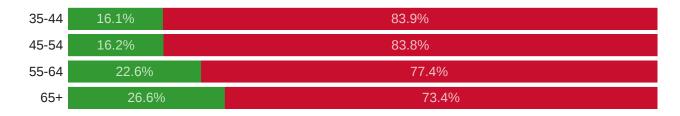
BY GENDER



BY YEARS EXPERIENCE

New dentists (graduated 2013-2022)	20.5%	79.5%
Established dentists (graduated<2013)	21.1%	78.9%

BY AGE GROUP



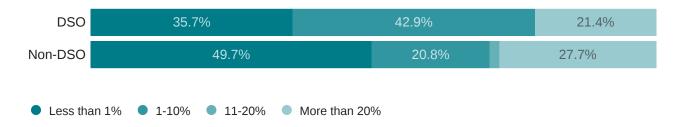
BY RACE/ETHNICITY





[If practice has billed medical insurance] If yes, please estimate for what share of your patients.

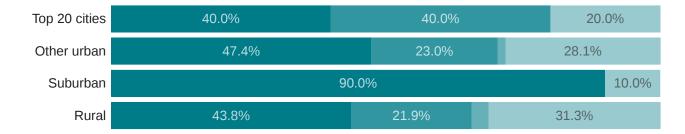
BY DSO AFFILIATION



BY PRACTICE SIZE

Solo dentists	47.0%	19.7%	30.8%
2 to 9 dentists	53.8%	24.60	% 21.5%

BY GEOGRAPHY



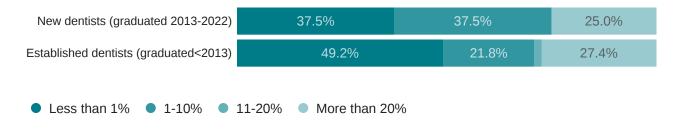
BY SEX

Male	51.1%	20.4%	27.0%
Female	42.0%	28.0%	28.0%

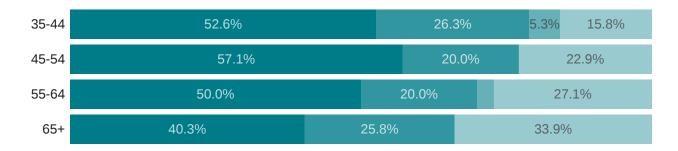


[If practice has billed medical insurance] If yes, please estimate for what share of your patients. (continued)

BY YEARS EXPERIENCE



BY AGE GROUP



BY RACE/ETHNICITY





Wave	Responses
2022SEP	1,102
2022OCT	1,170
2022NOV	1,137
2022DEC	1,138
2023JAN	1,209
2023FEB	1,168
2023MAR	1,053
2023APR	1,008
2023MAY	1,001
2023JUN	1,103
2023JUL	955
2023AUG	1,141
2023SEP	976

Number of Responses from Dentists in Private Practice by Wave

Number of Responses by Group - Week of September 11, 2023

Ownership staus	Choice Count
Owner dentist (i.e., sole owner, partner, or shareholder)	888
Employee dentist (nonowner)	47
Associate dentist (nonowner)	25
Independent contractor	16



Number of Responses by Group - Week of Septemer 11, 2023 (continued)

DSO Affiliation	Choice Count
DSO	33
Non-DSO	931
Practice Size	Choice Count
Solo dentists	598
2 to 9 dentists	363
Large group (10+ dentists)	14
Geography	Choice Count
Top 20 Cities	73
Other Urban	699
Suburban	49
Rural	154
Sex	Choice Count
Male	658
Female	318
Years Experience	Choice Count
New dentists (graduated 2013 - 2022)	55
Established dentists (graduated before 2013)	921



Choice Count

ADA American Dental Association®

Number of Responses by Group - Week of September 11 (continued)

Age	Choice Count
<35	17
35-44	140
45-54	230
55-64	324
65+	265

Race/Ethnicity

White	737
Asian	81
Hispanic	61
Black	14
Native Hawaiian / Pacific Islander	3
American Indian / Alaska Native	3
Other	14
Unknown	61