HPI Health Policy Institute
ADA American Dental Association®

Economic Outlook and Emerging Issues in Dentistry
3rd Quarter, 2024

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Results for the questions below are reported in two sections:

- **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.

	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)	3	7
[Owners only] Is your practice currently accepting new patients?	3	14
[If accepting new patients] Currently, how many business days does the average new patient have to wait for an initial appointment (excluding emergencies)?	3	14
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	50
Please indicate why you dropped out of the dental insurance networks.	6	52

Number of Responses by Wave/by Group	56

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

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About This Study

The survey for the third quarter of 2024 was sent September 16, 2024 to 2,437 panel members; 997 responded, for an adjusted response rate (excluding undeliverable email addresses) of 41.2%. 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?"

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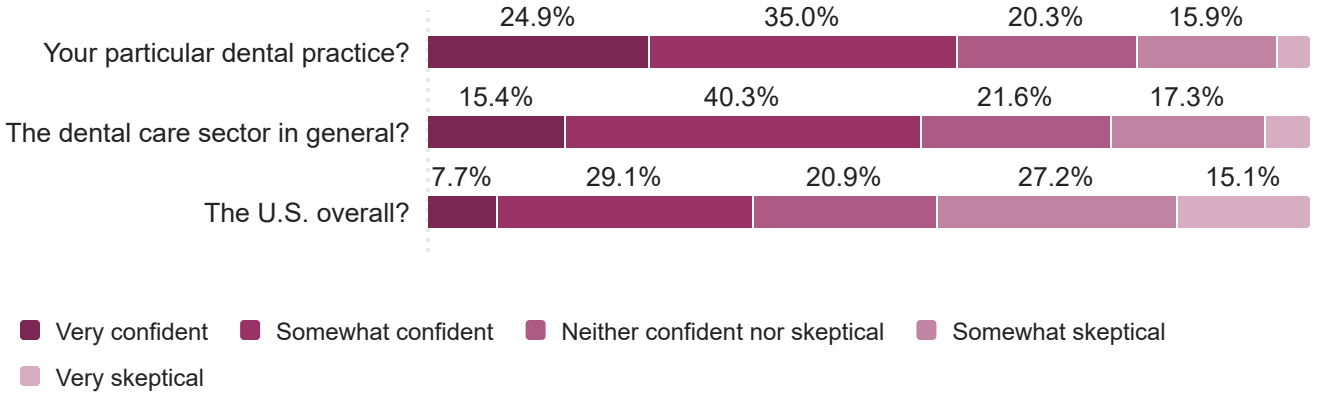
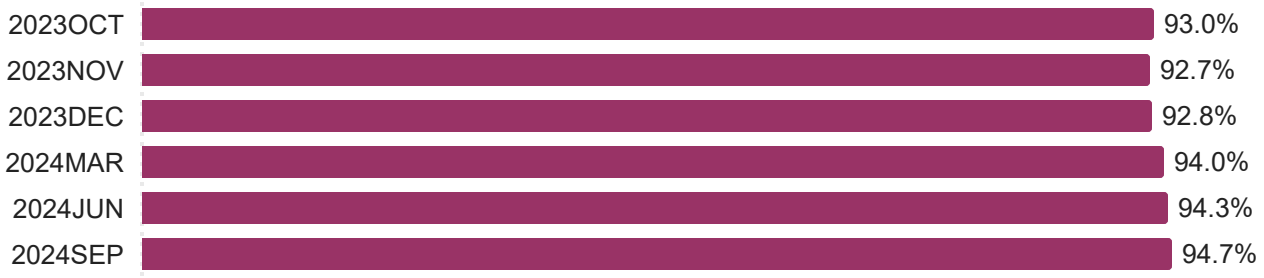
All Respondents

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

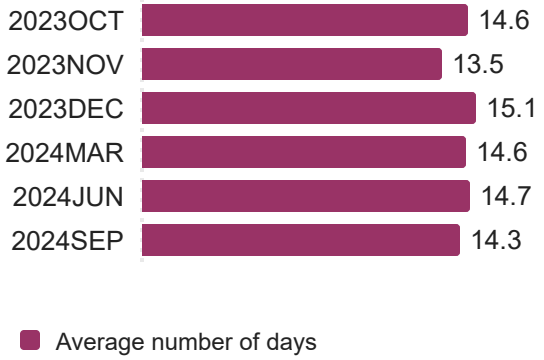
952 Responses



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)?



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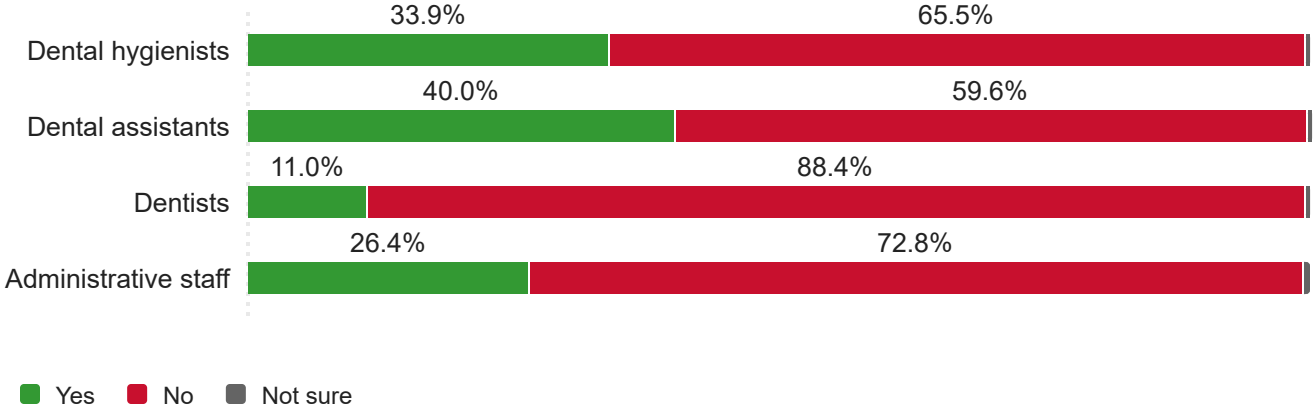
Which of the following best describes your general busyness level over the last 3 months?

952 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

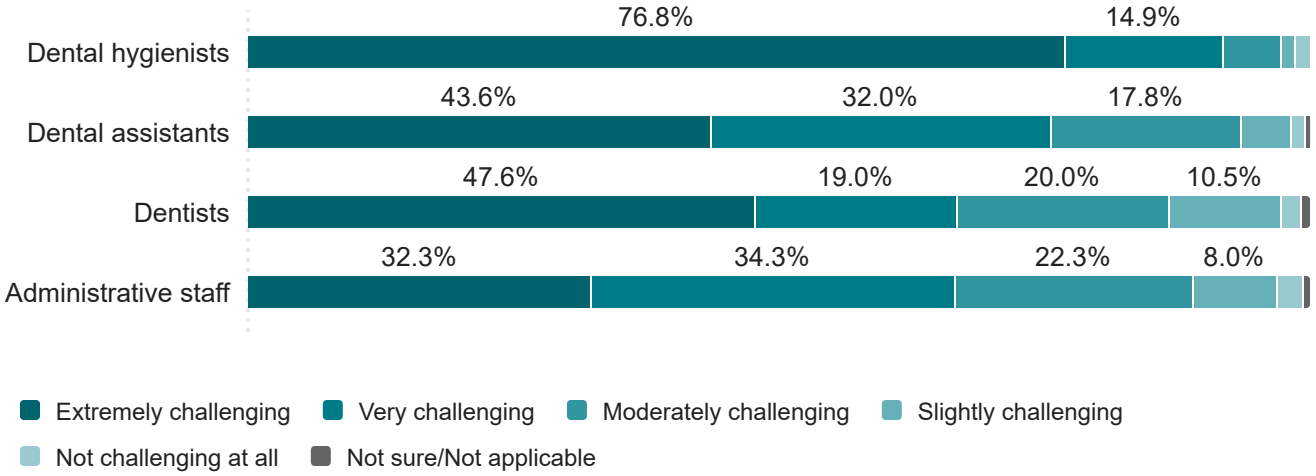
Currently, or at any time during the last 3 months, have you recruited any of the following positions?

952 Responses



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

593 Responses



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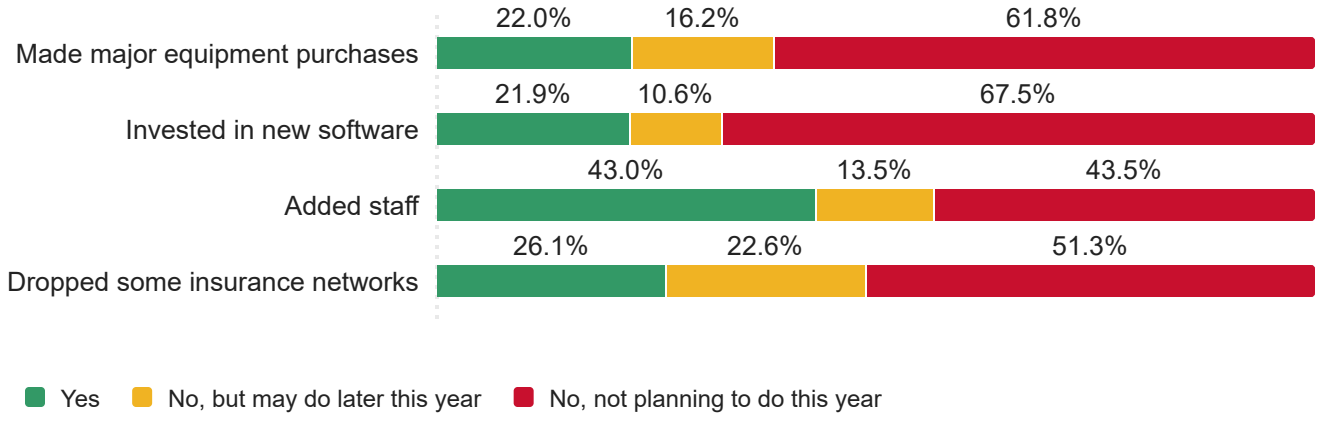
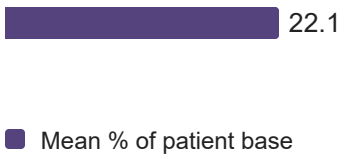
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

872 Responses



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

208 Responses



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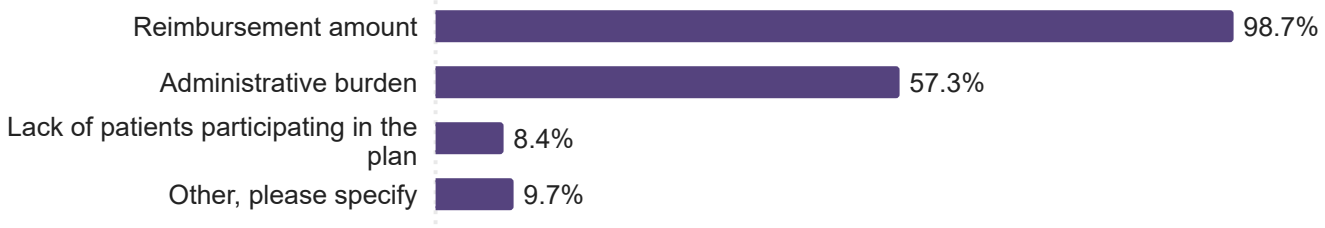
Please indicate why you dropped out of the dental insurance networks. (Select all that apply.)

227 Responses



22 Responses

Other, please specify:	Percentage of Responses
DENIAL OF COVERAGE / INTERFERENCE WITH TREATMENT DECISIONS	50.0%
INEFFICIENCIES / DELAYED PAYMENT	18.2%
BUNDLING CODES / DOWN-CODING	9.1%
NEEDED TO REDUCE PATIENT POOL	9.1%
DICTATIVE APPROACH TO CONTRACT AGREEMENT	4.5%
NETWORK AFFILIATION AGREEMENTS	4.5%
NO LONGER NEEDED TO PARTICIPATE	4.5%
NETWORK SHARED INFO WITH OTHER INSURANCE NETWORKS	4.5%

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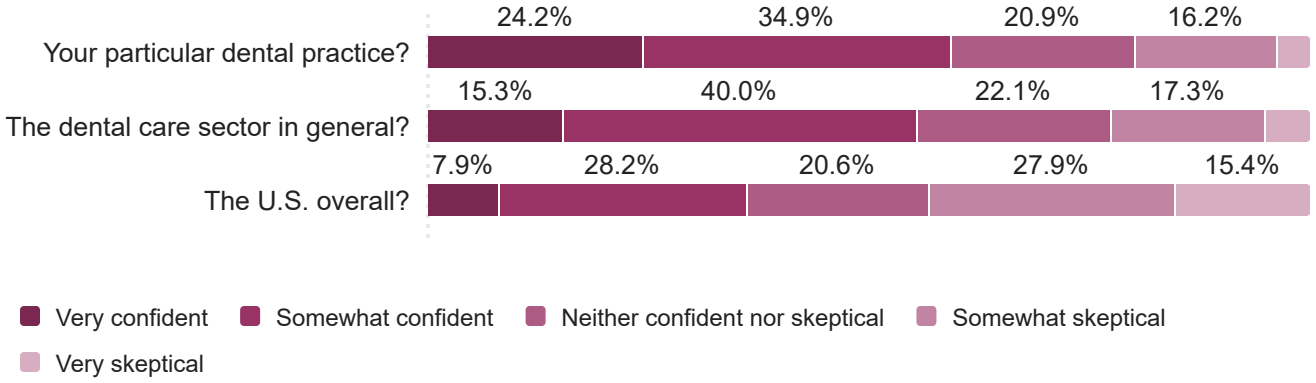
Economic Confidence

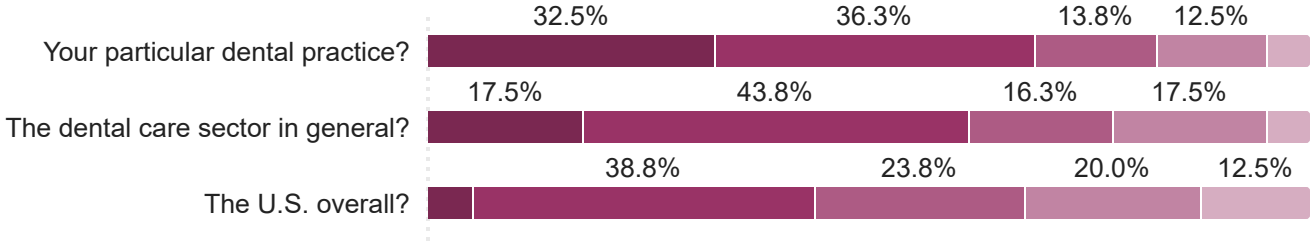
BY OWNERSHIP STATUS

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

Owner



Non-owner



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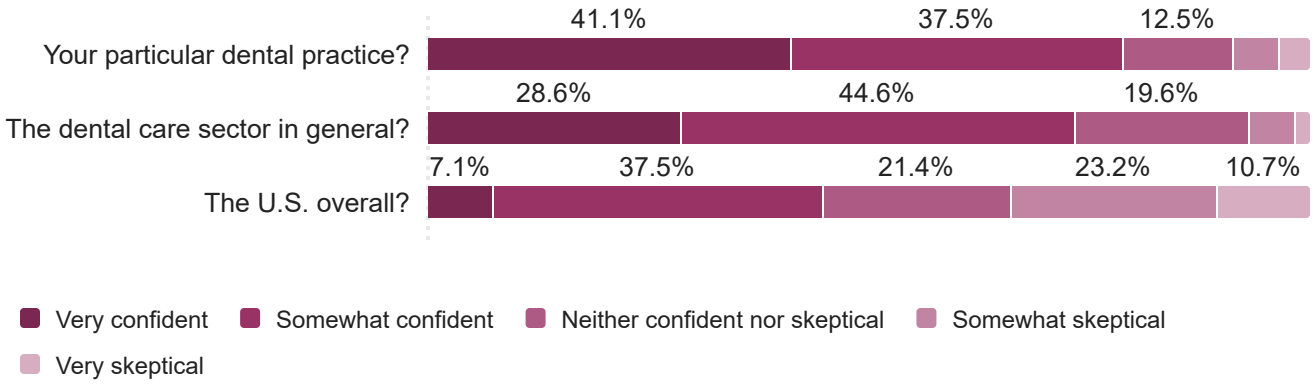
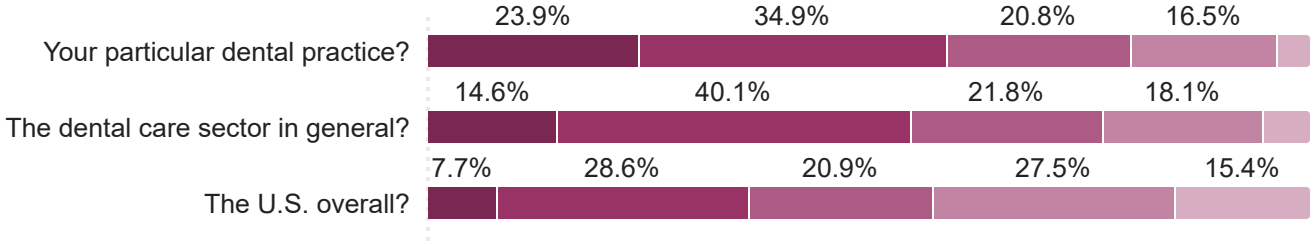
BY DSO AFFILIATION

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

DSO



Non-DSO



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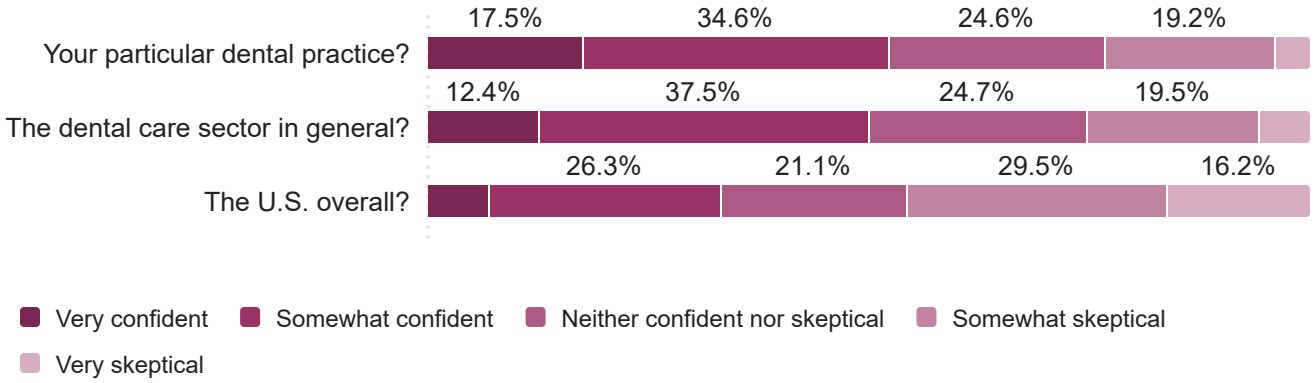
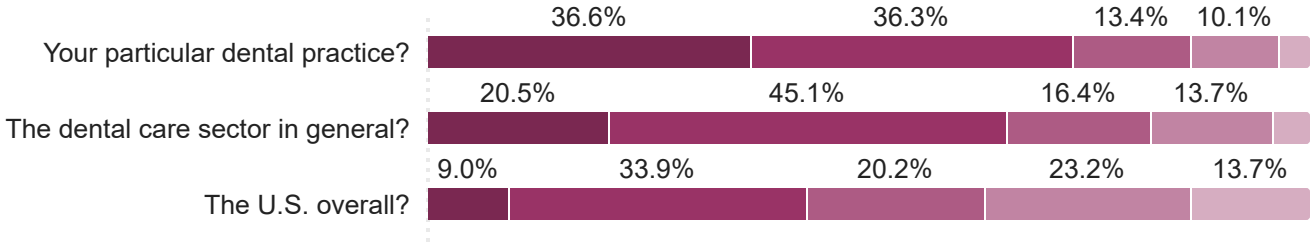
BY PRACTICE SIZE

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

Solo dentists



2 to 9 dentists



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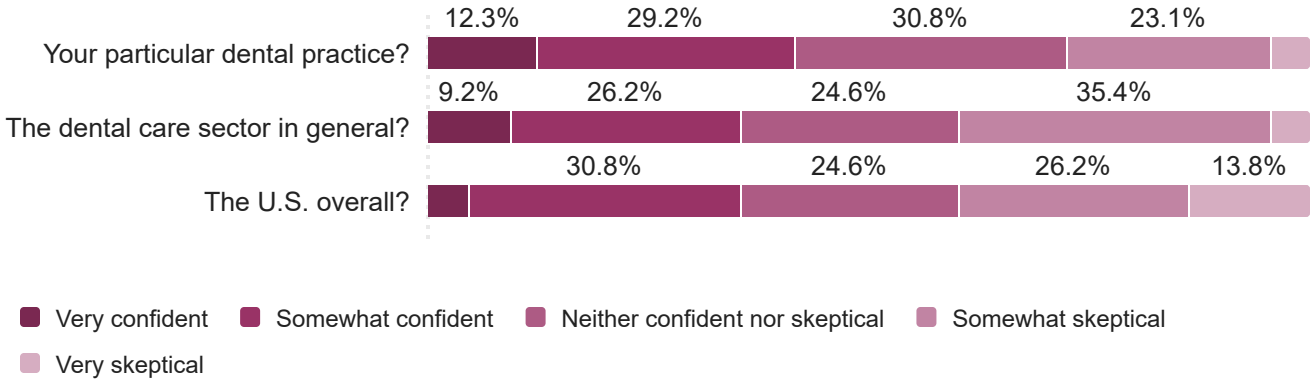
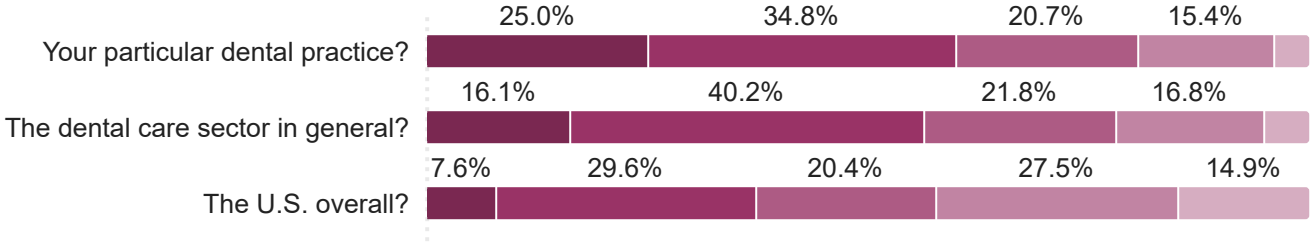
BY GEOGRAPHY

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

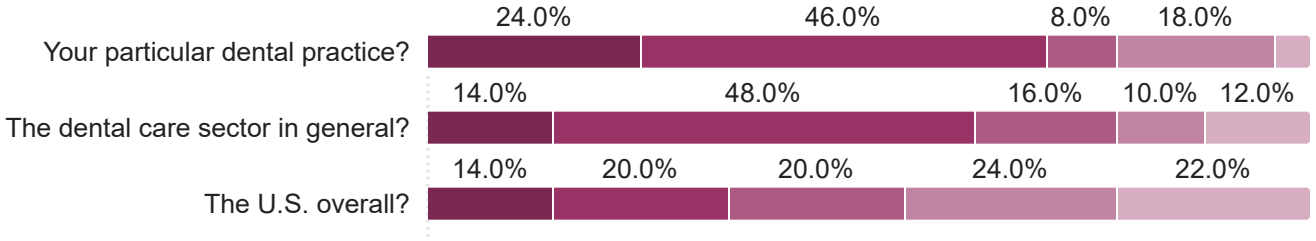
Top 20 cities



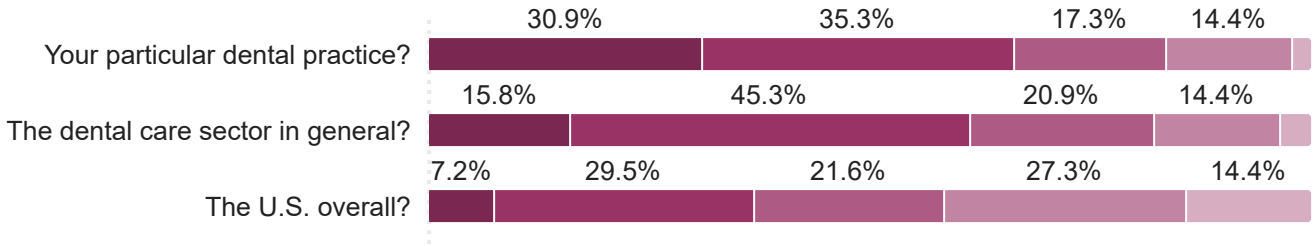
Other urban



Suburban



Rural



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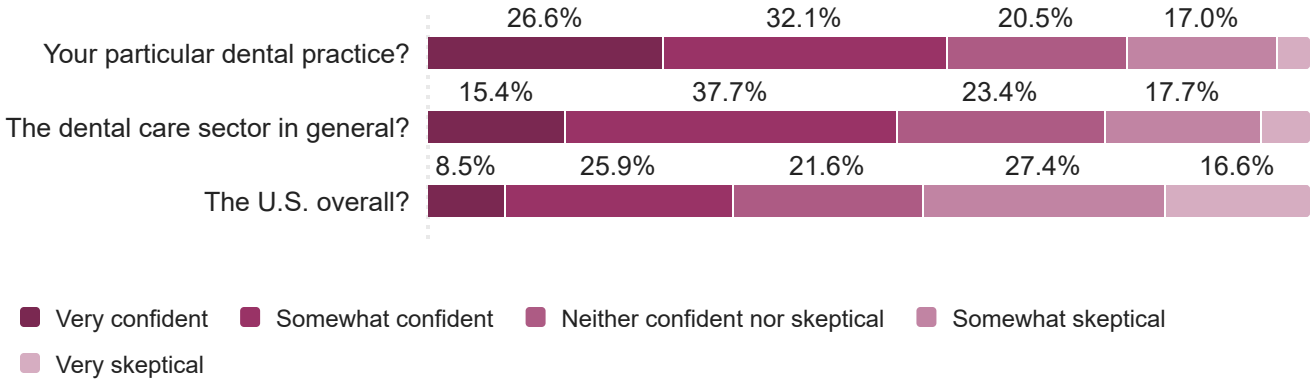
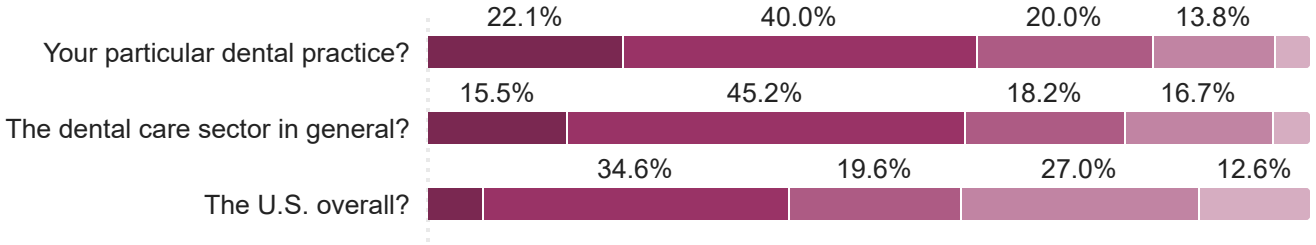
BY SEX

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

Male



Female



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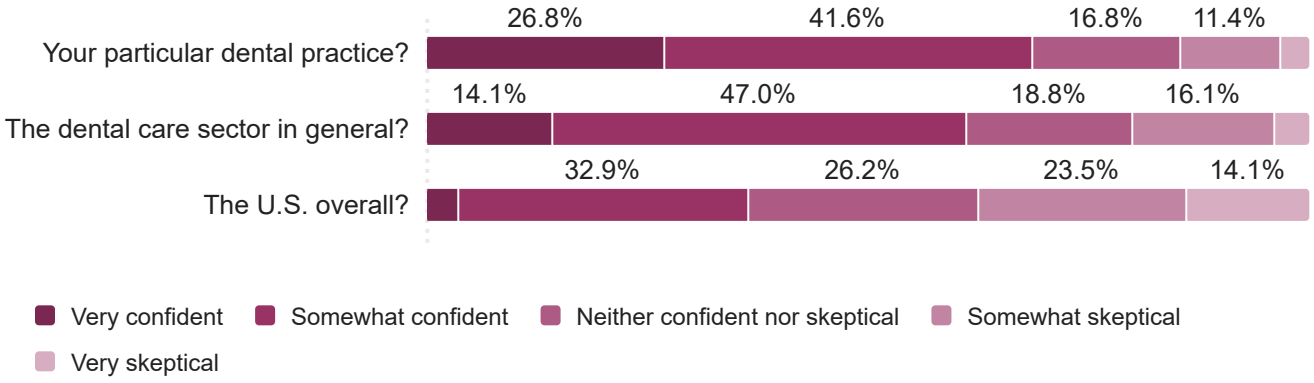
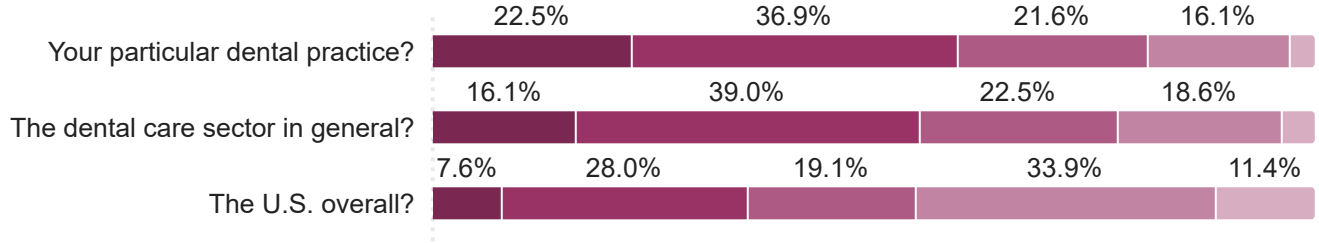
BY AGE GROUP

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

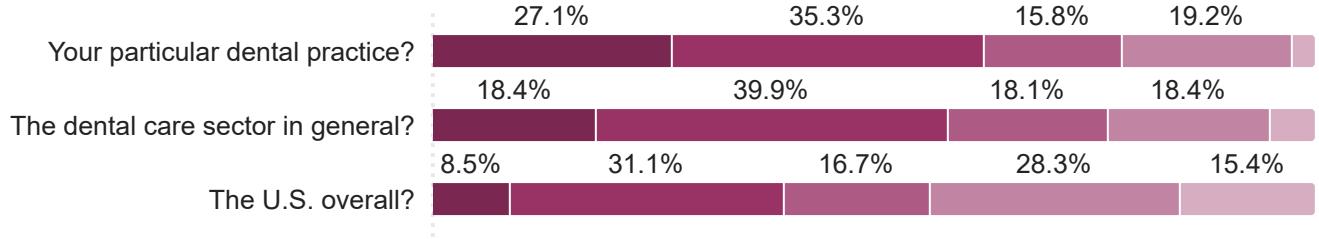
35 to 44



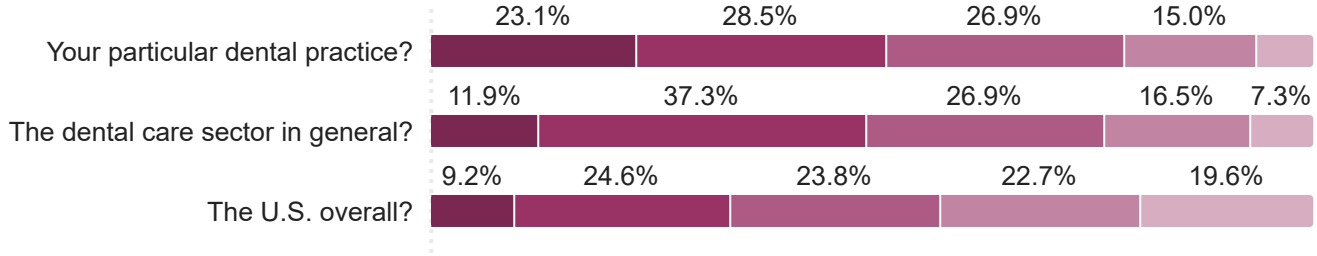
45 to 54



55 to 64



65 or older



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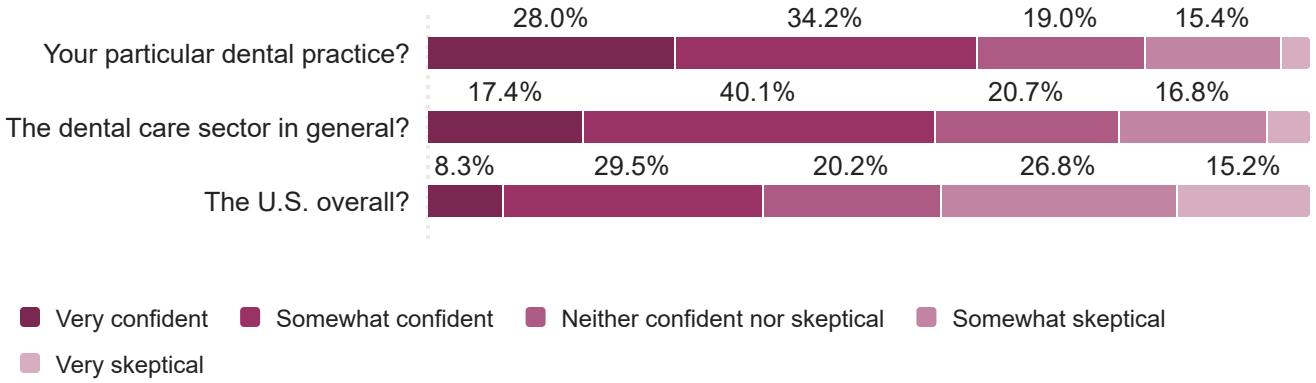
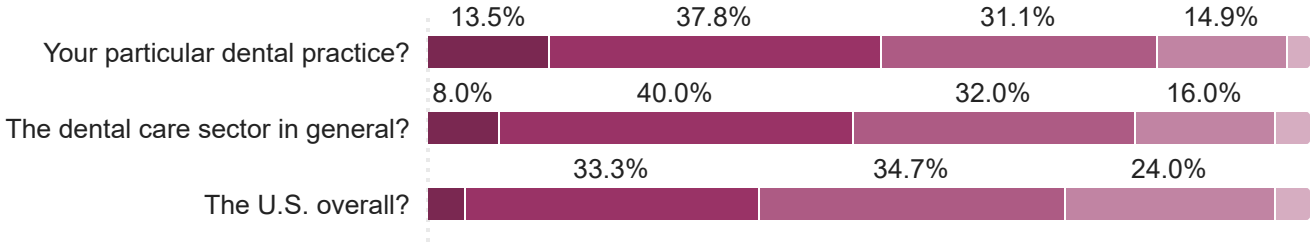
BY RACE/ETHNICITY

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

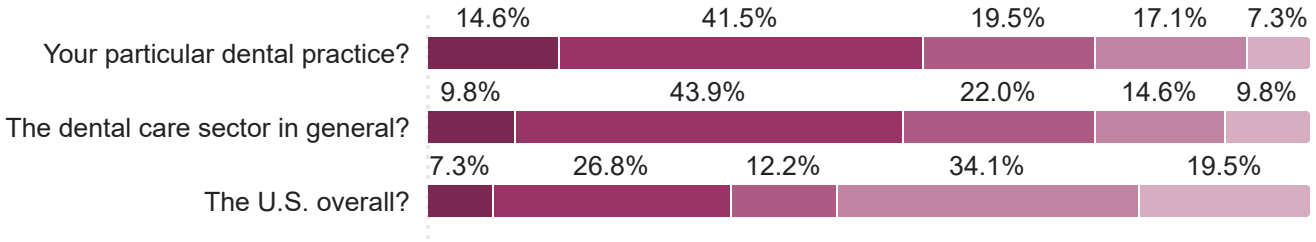
White



Asian



Hispanic



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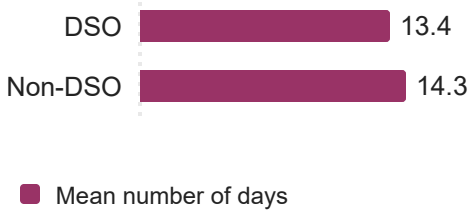
Patient Wait Times

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)?



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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

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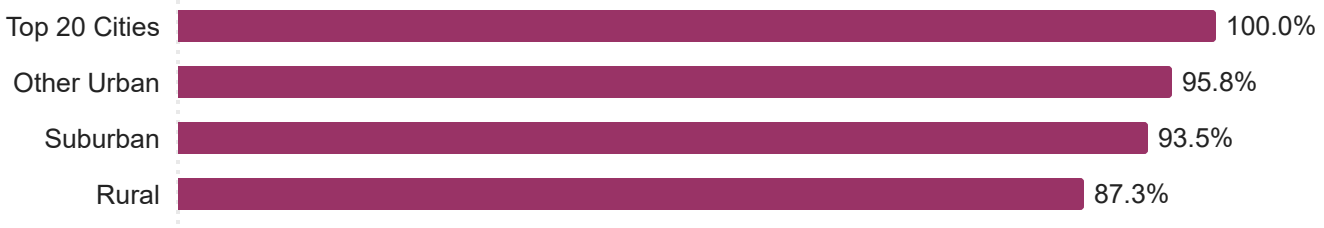
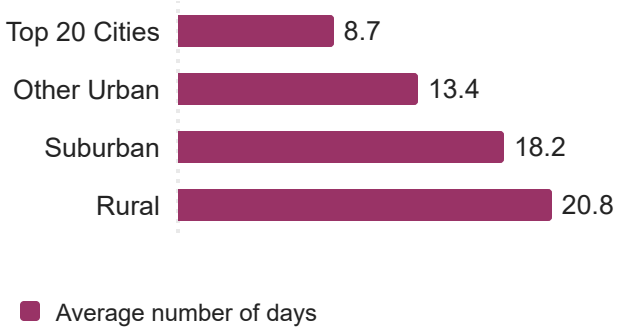
BY GEOGRAPHY

[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)?



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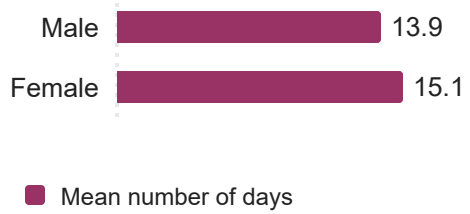
BY SEX

[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)?



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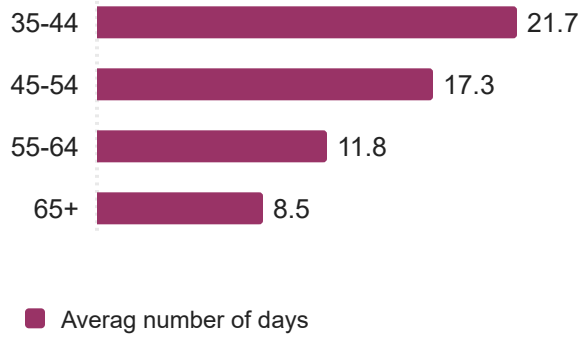
BY AGE GROUP

[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)?



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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

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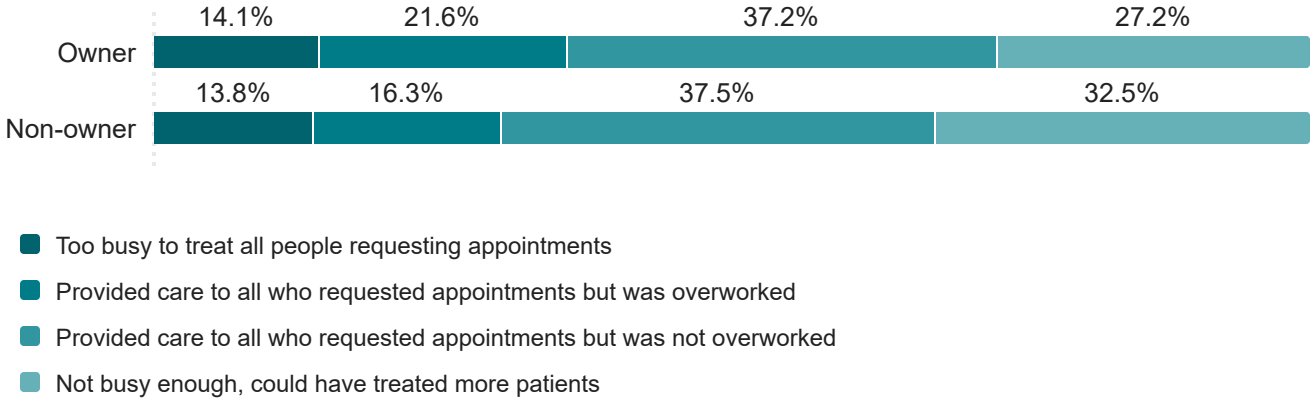
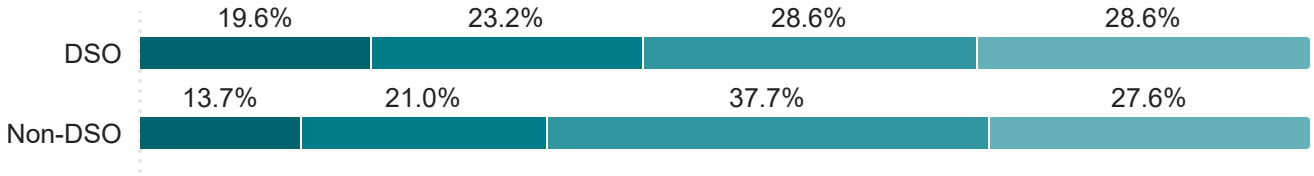
Busyness

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

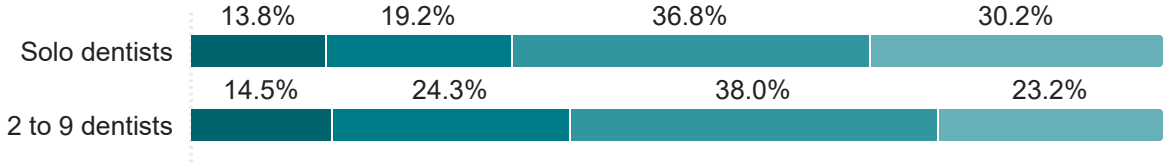
BY OWNERSHIP STATUS



BY DSO AFFILIATION



BY PRACTICE SIZE



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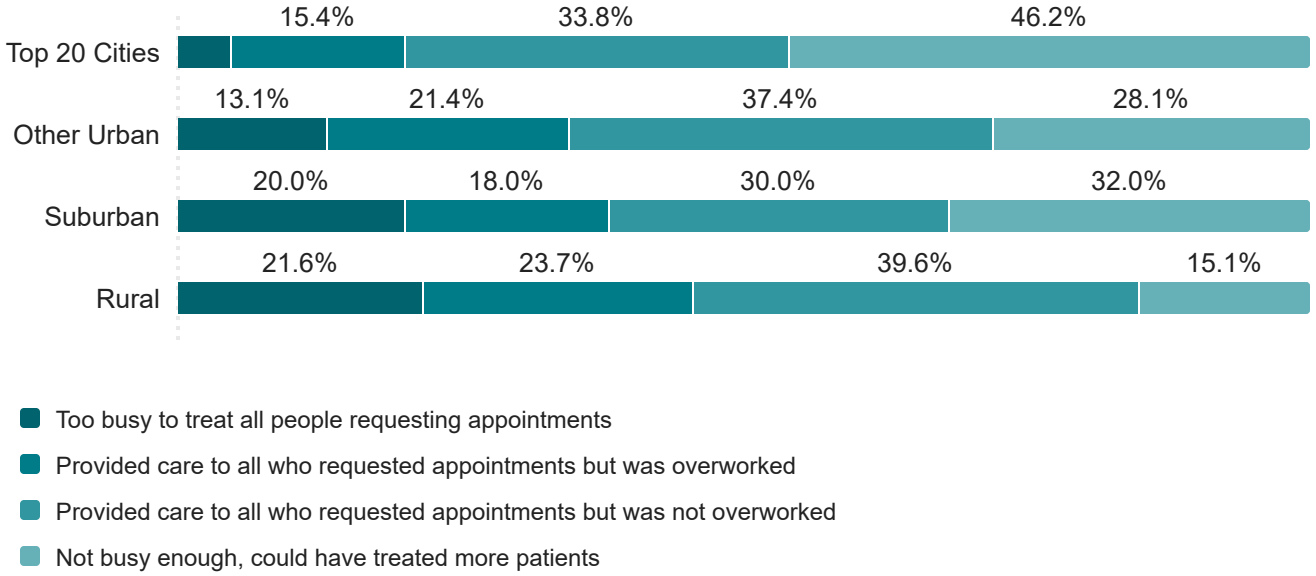
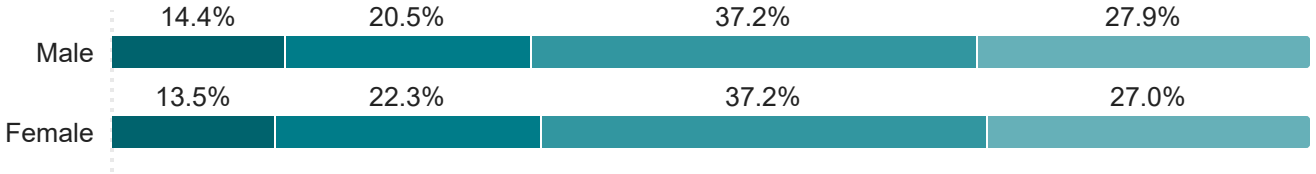
Which of the following best describes your general busyness level over the last 3 months? (continued)

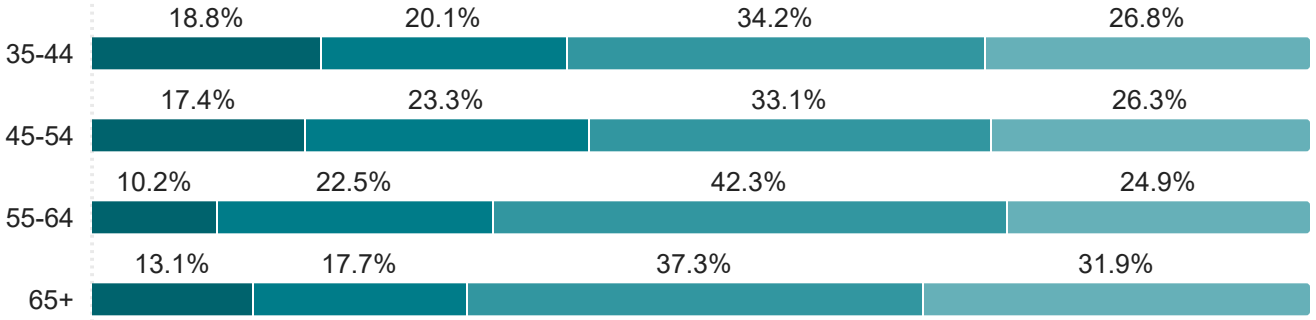
BY GEOGRAPHY



BY GENDER



BY AGE GROUP



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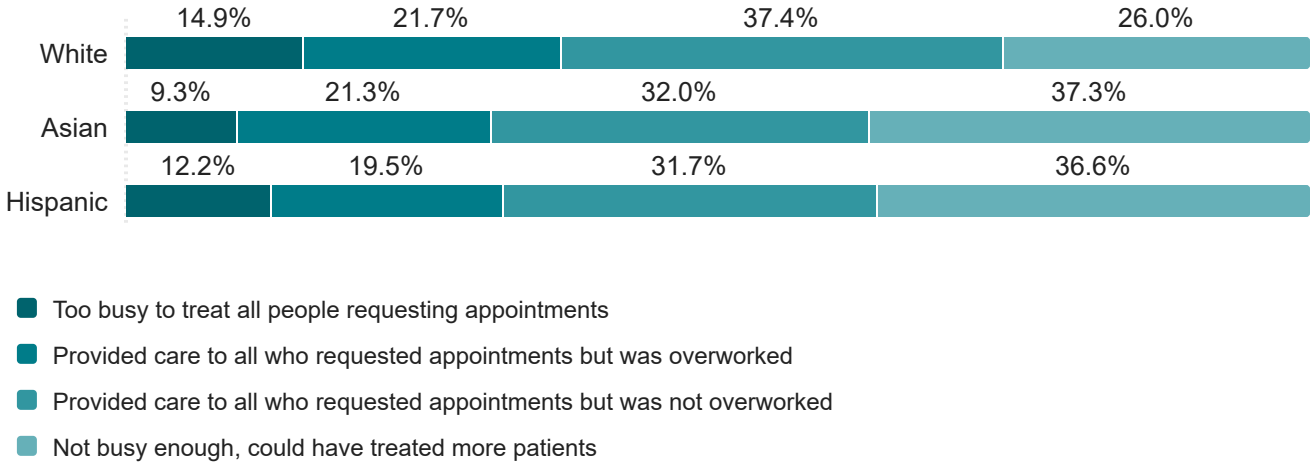
Which of the following best describes your general busyness level over the last 3 months? (continued)

BY RACE/ETHNICITY



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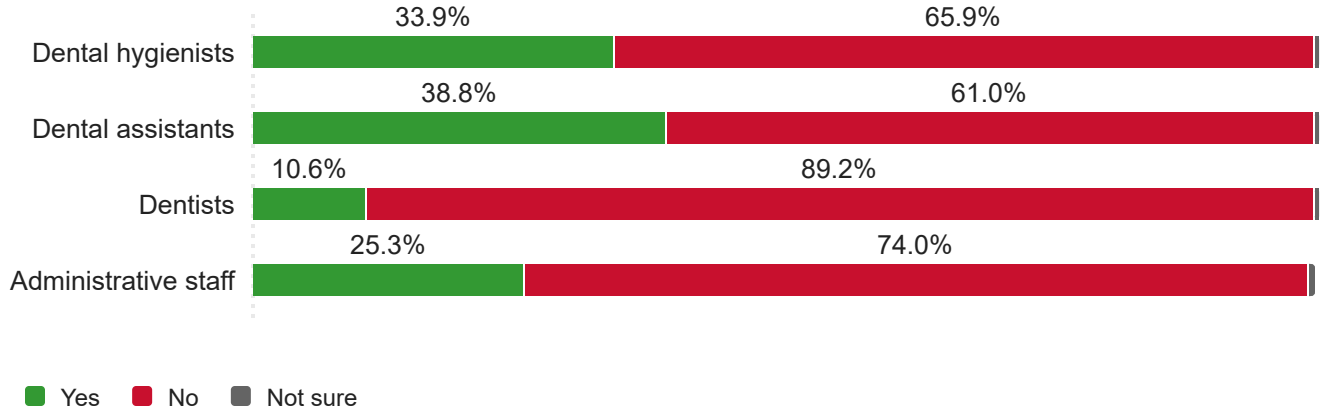
Staff Recruitment

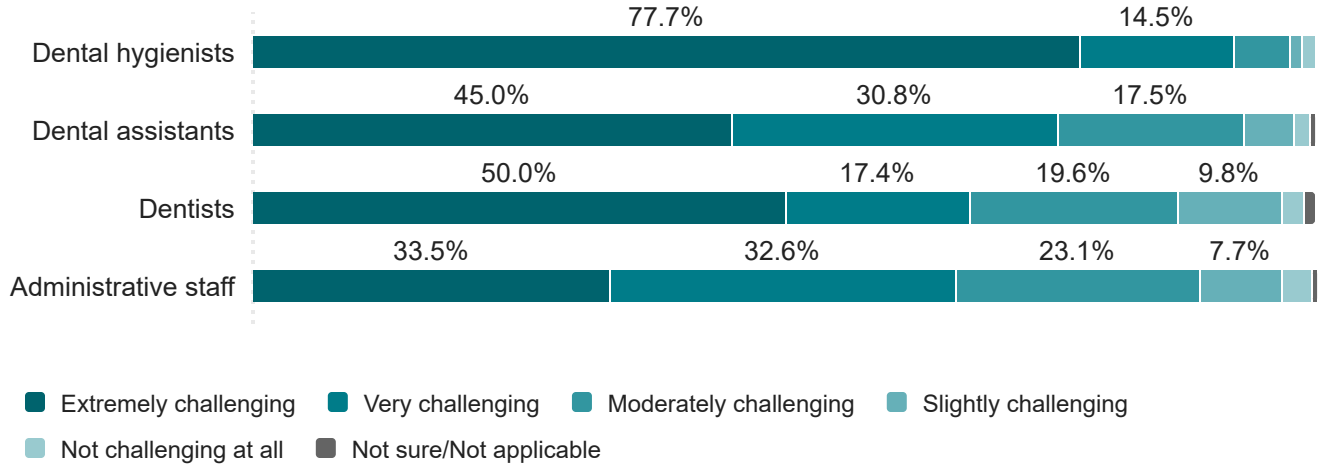
BY OWNERSHIP STATUS

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?



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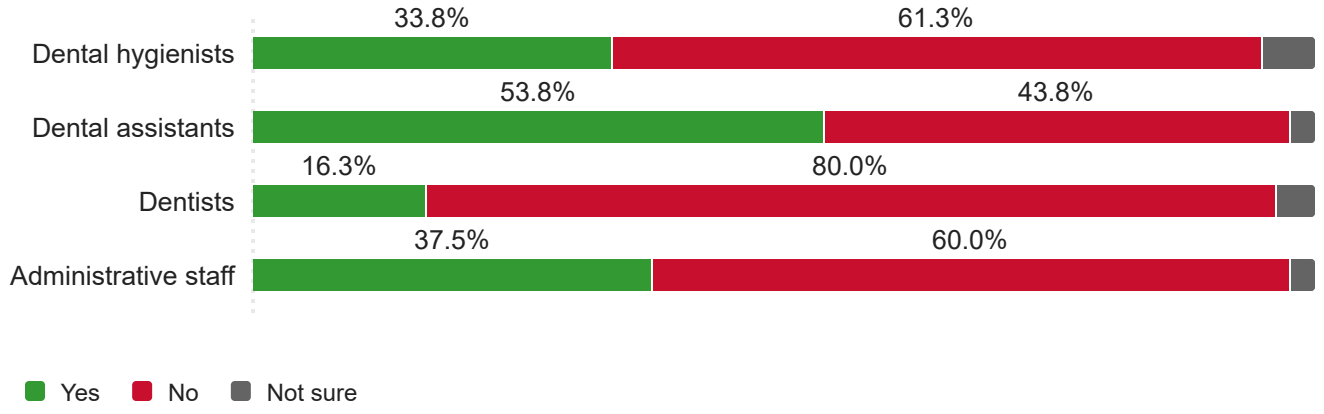
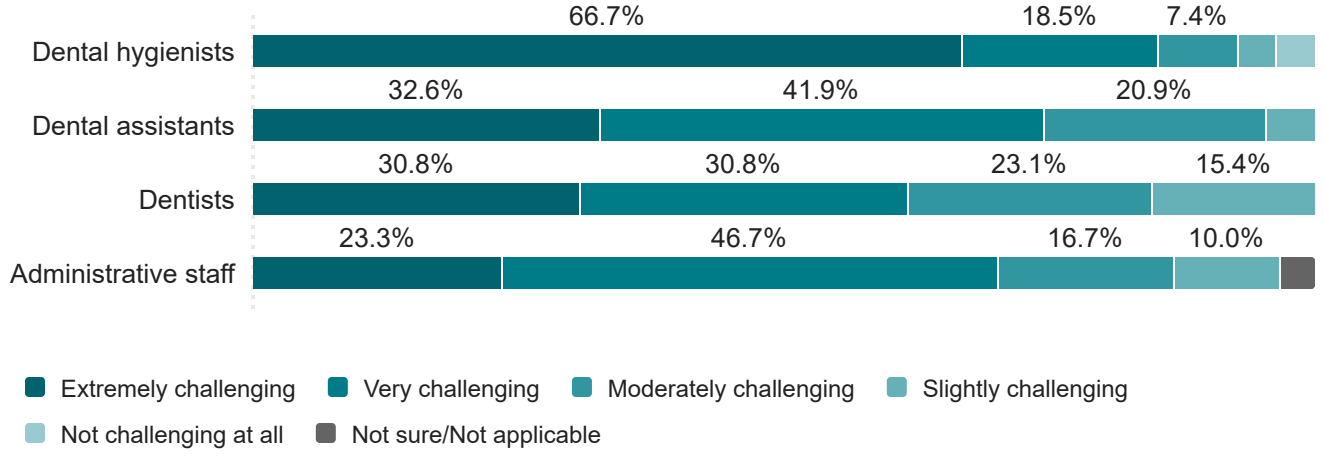
BY OWNERSHIP STATUS (continued)

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?



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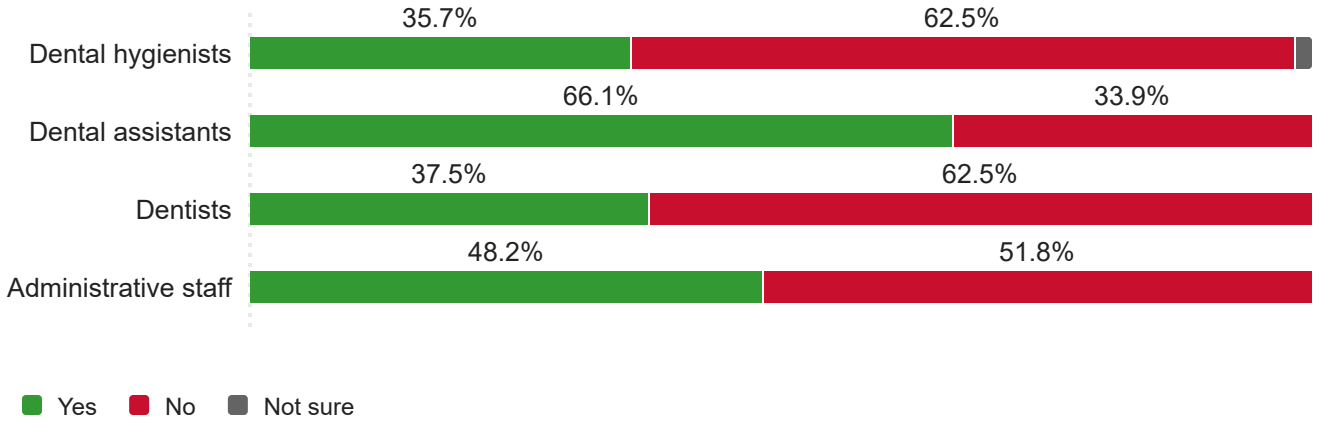
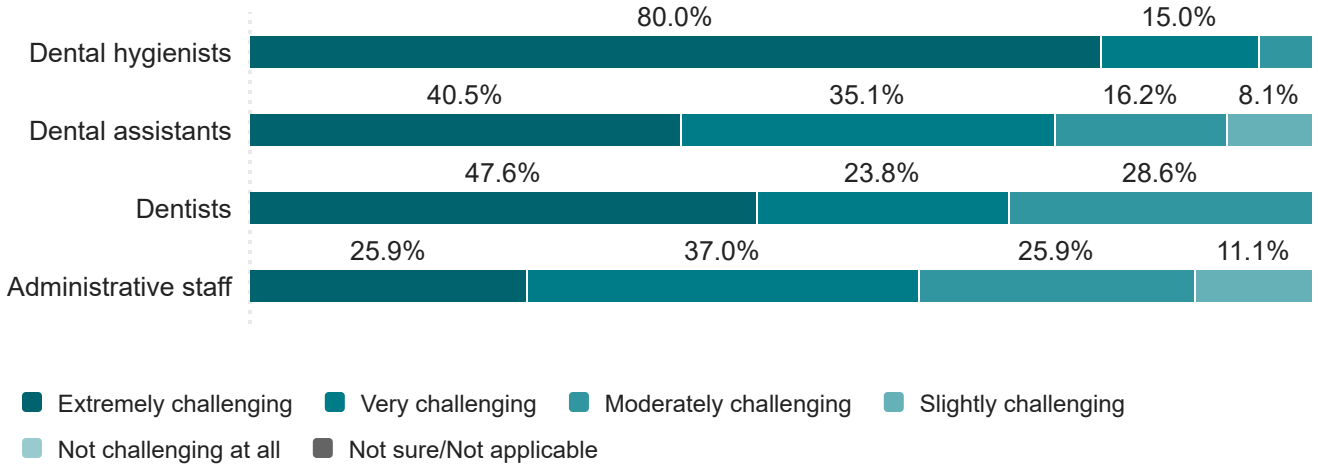
BY DSO AFFILIATION

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?



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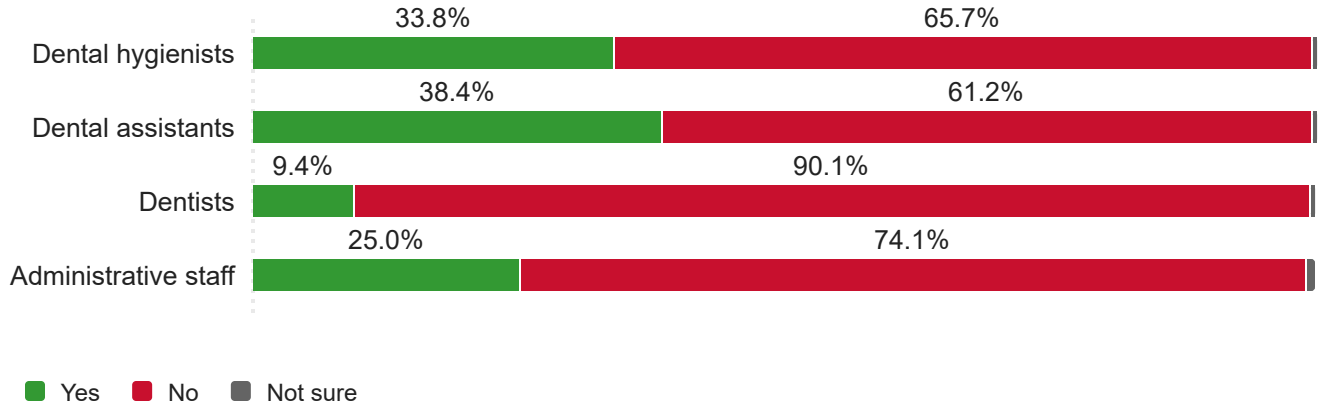
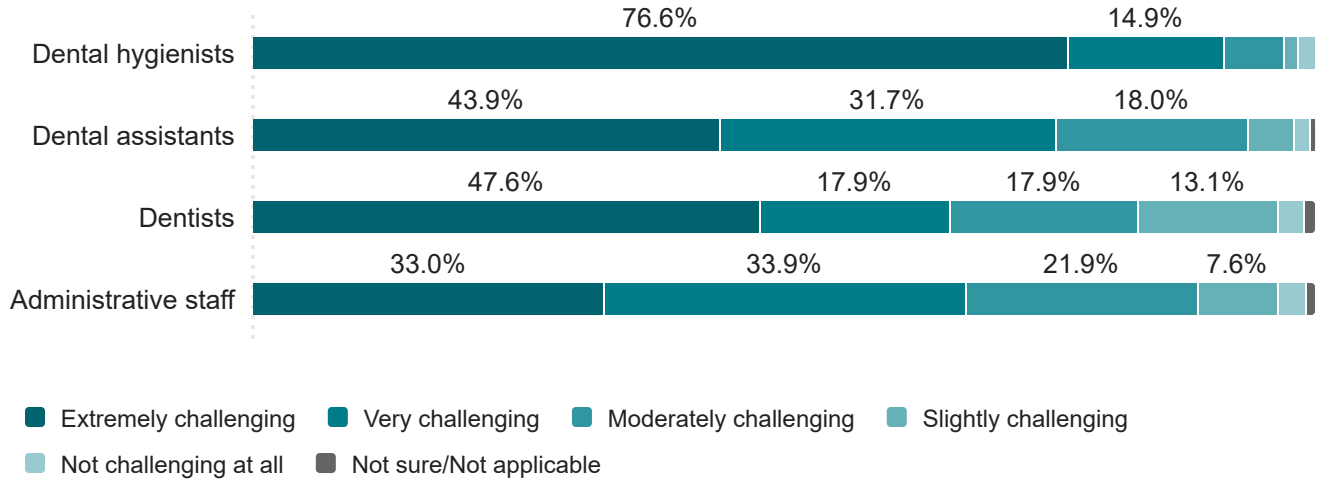
BY DSO AFFILIATION (continued)

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?



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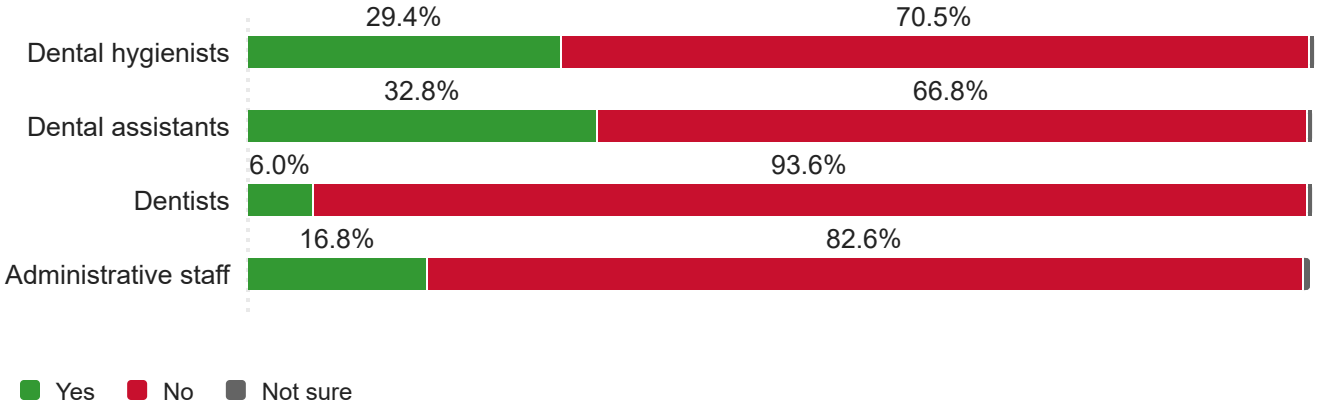
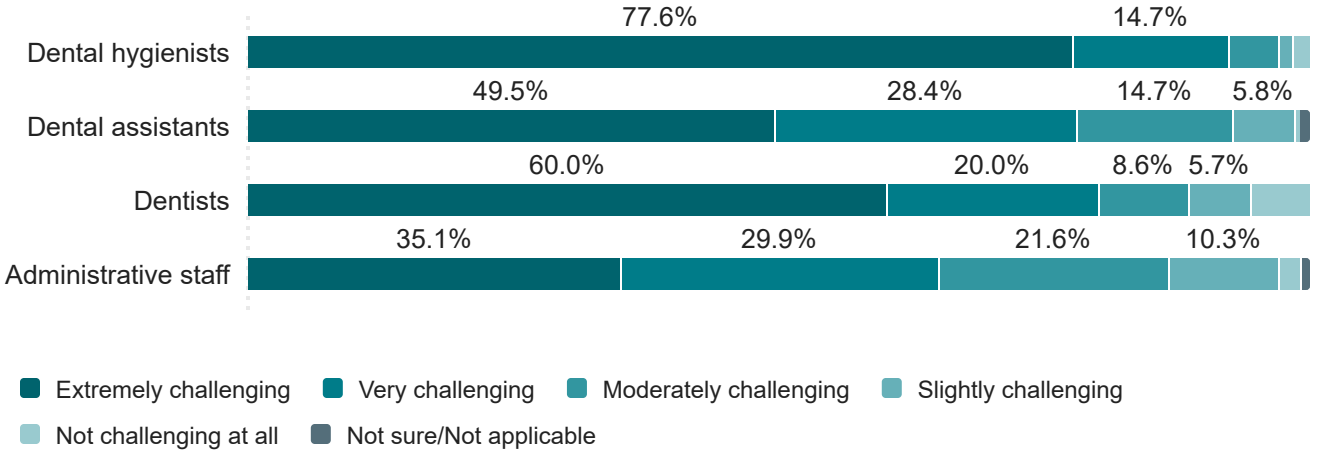
BY PRACTICE SIZE

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?



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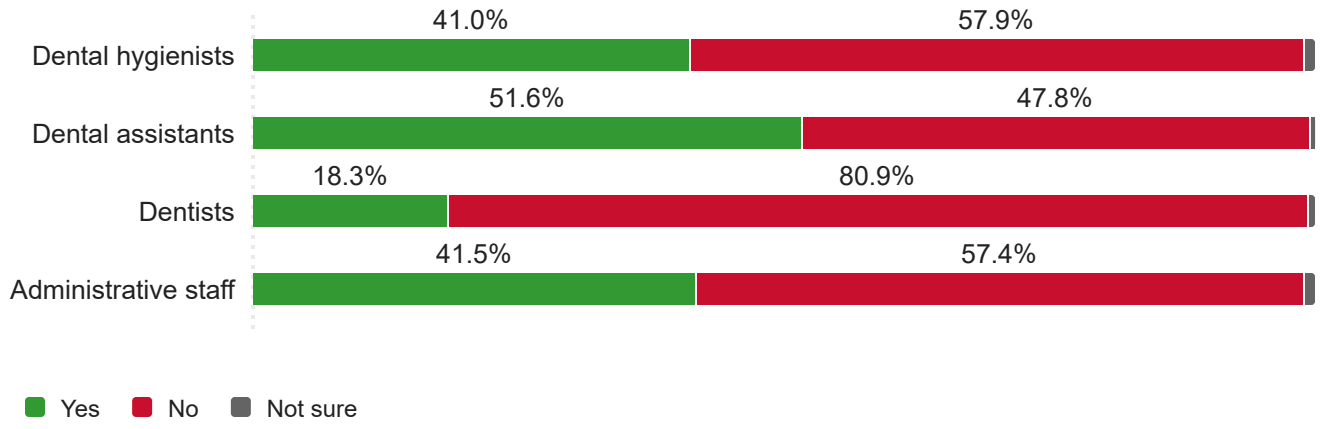
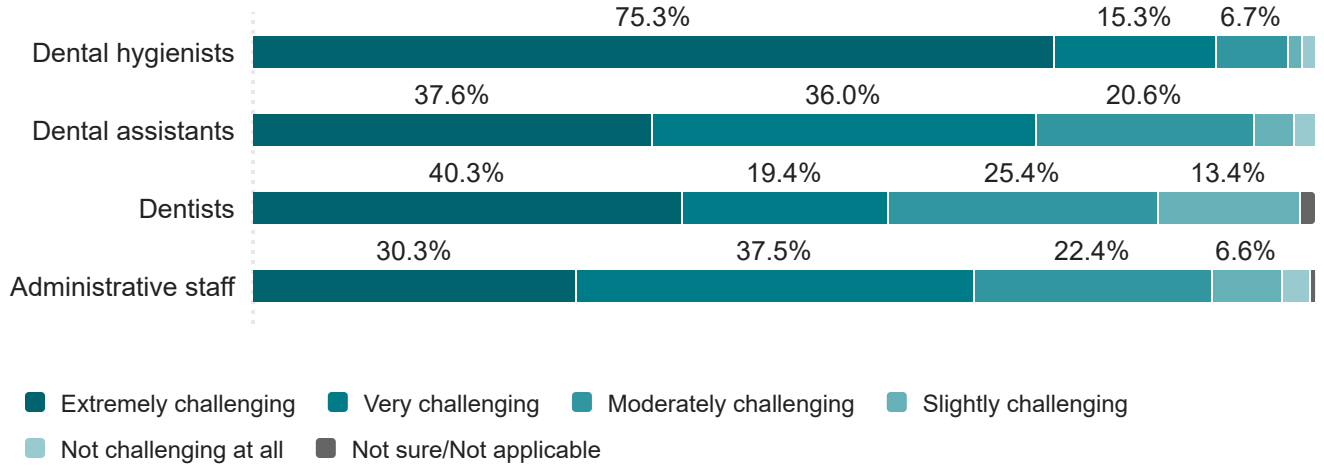
BY PRACTICE SIZE (continued)

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?



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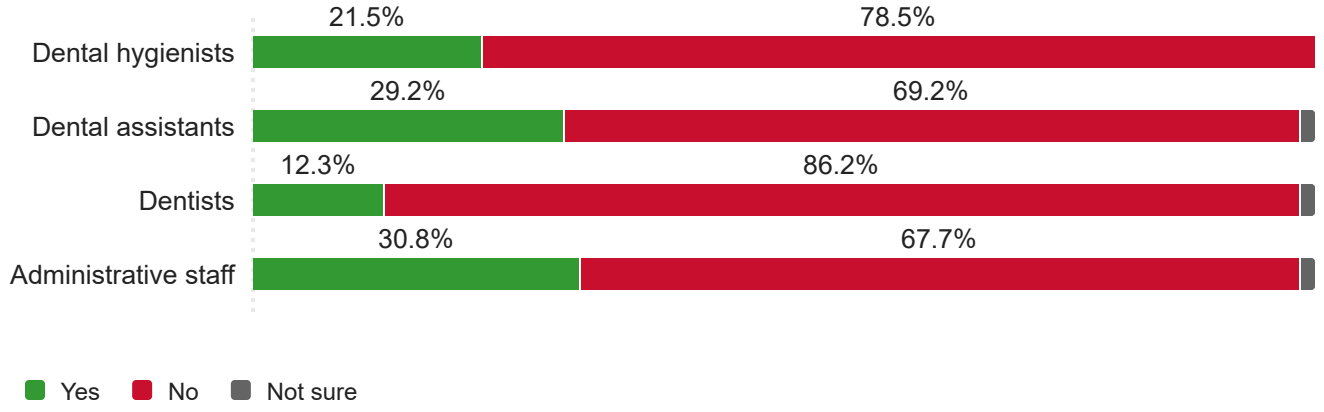
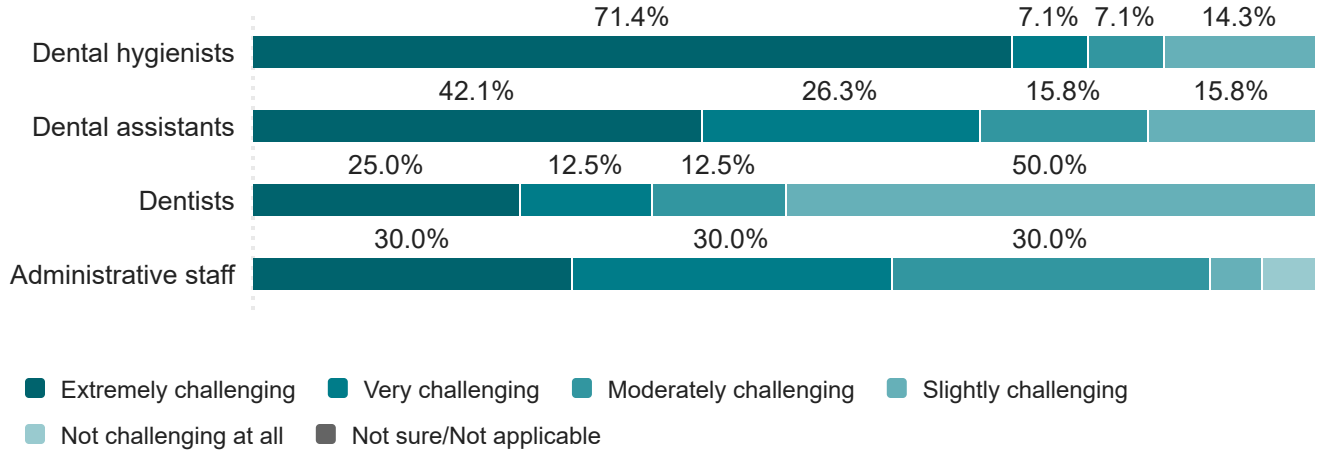
BY GEOGRAPHY

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?



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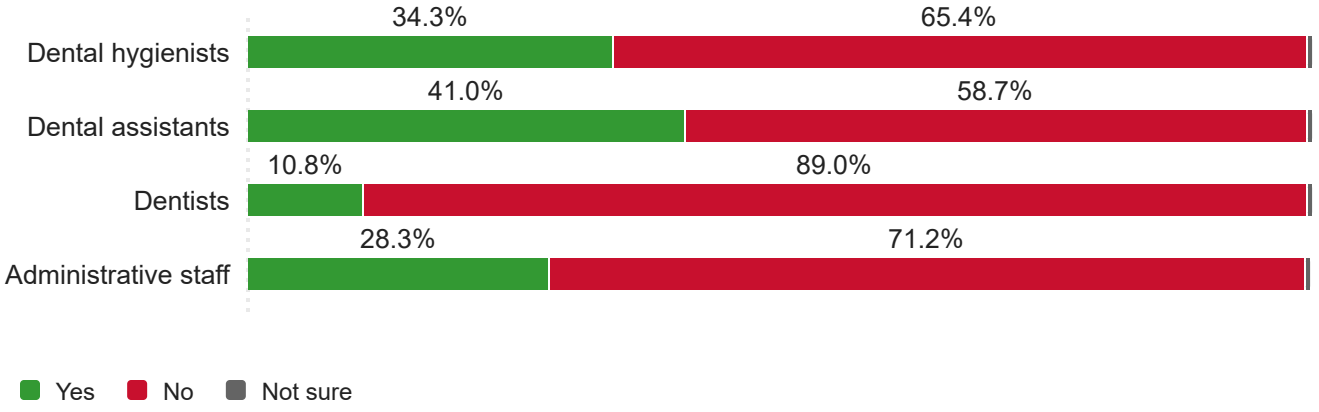
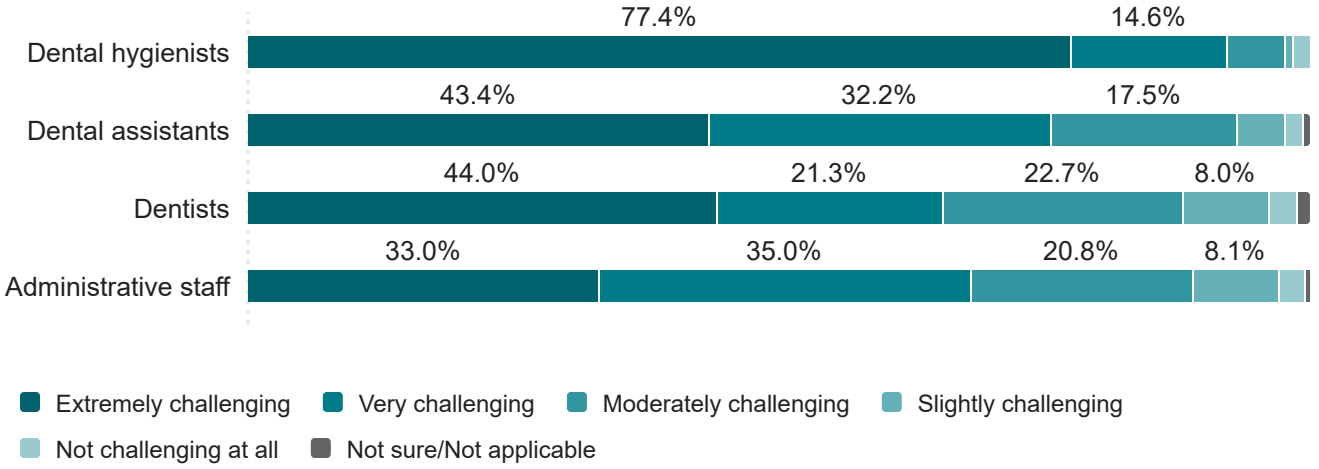
BY GEOGRAPHY (continued)

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?



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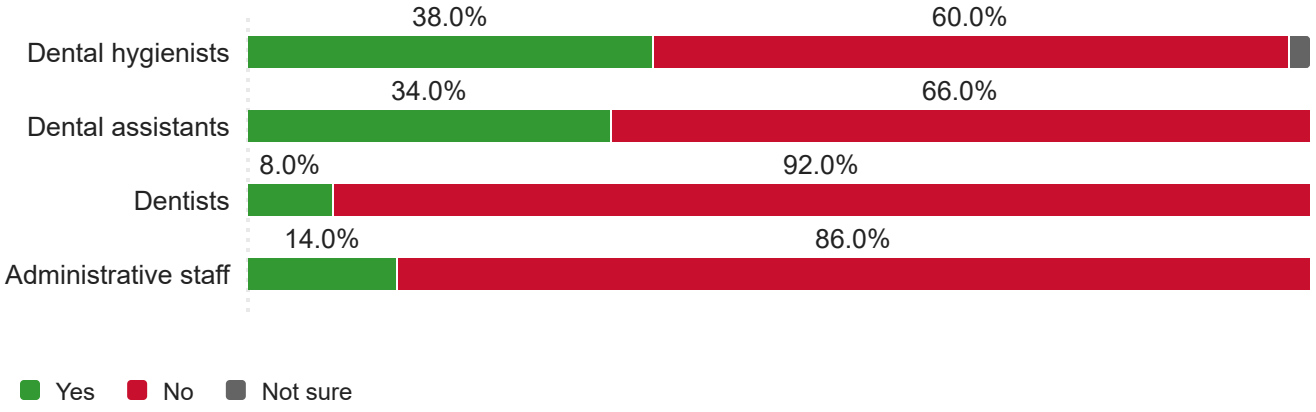
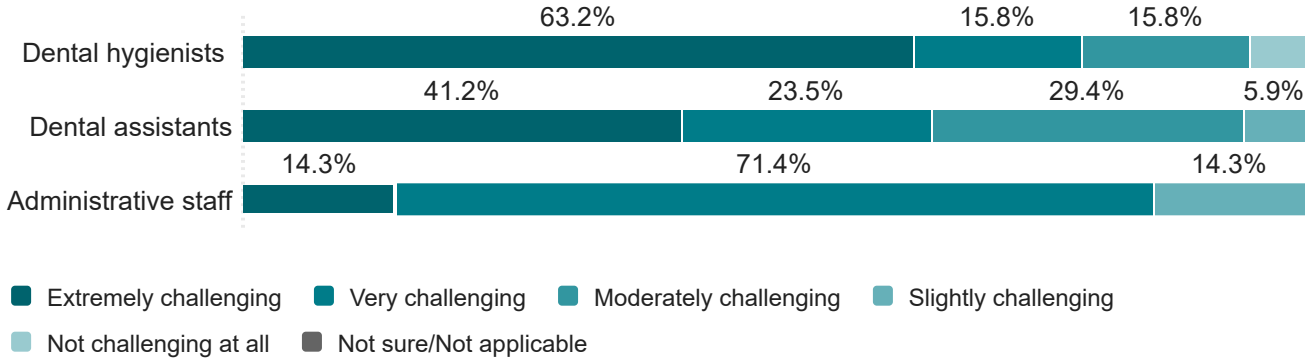
BY GEOGRAPHY (continued)

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?



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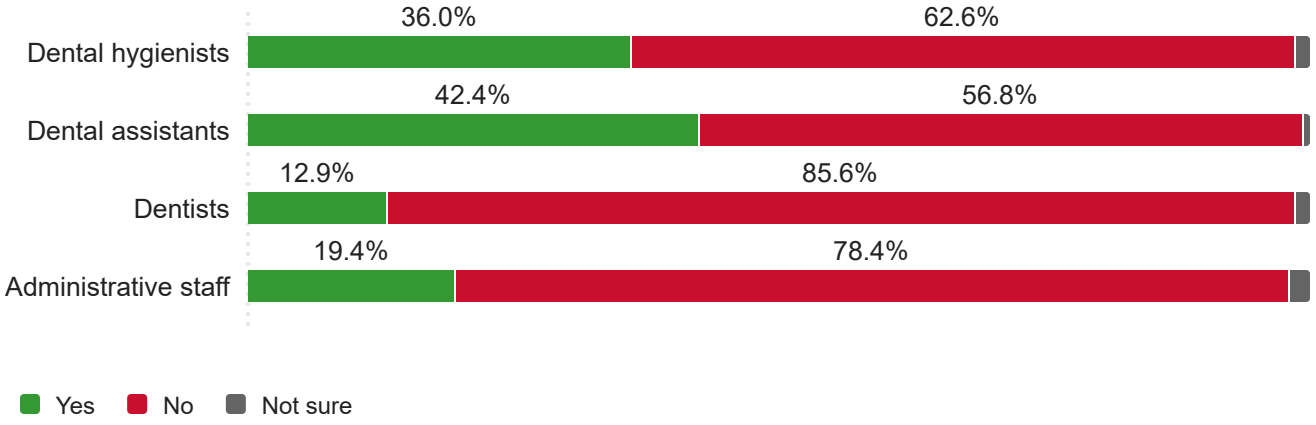
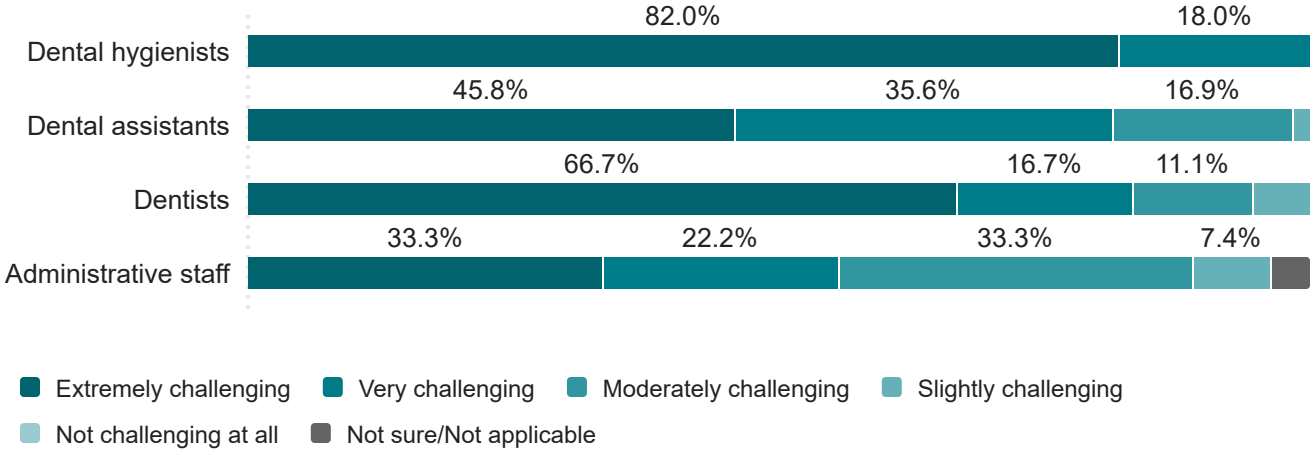
BY GEOGRAPHY (continued)

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?



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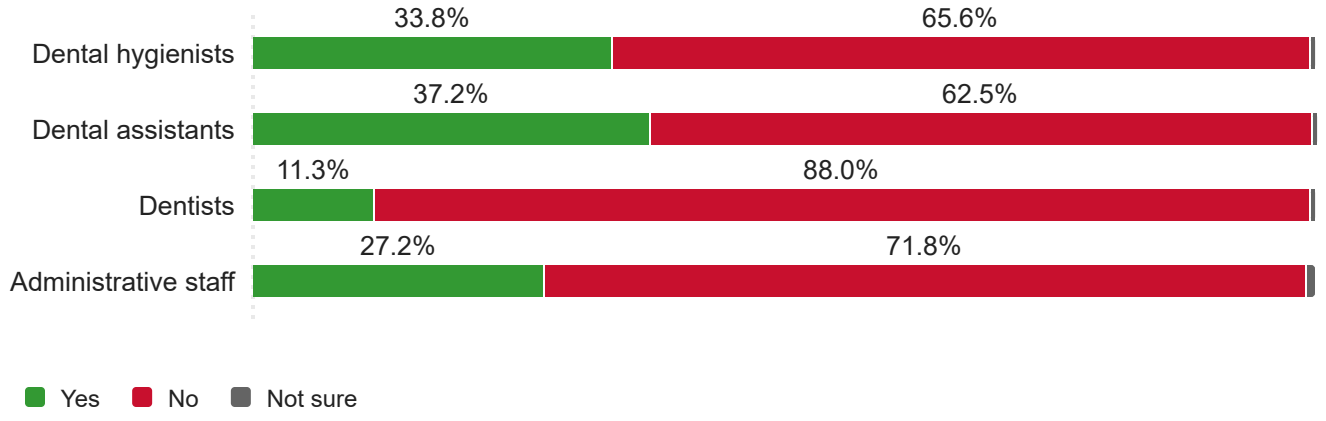
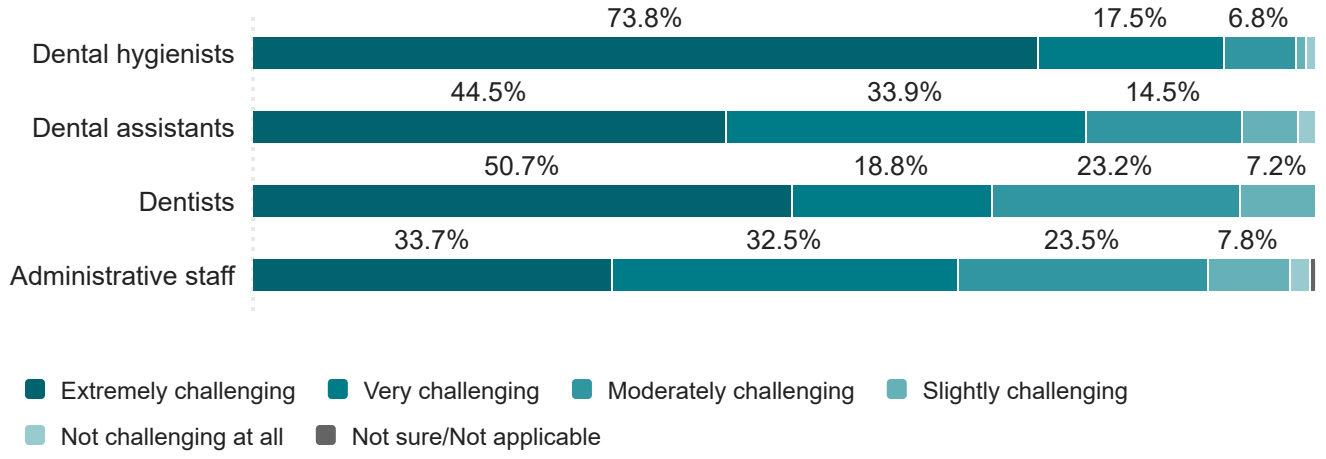
BY SEX

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?



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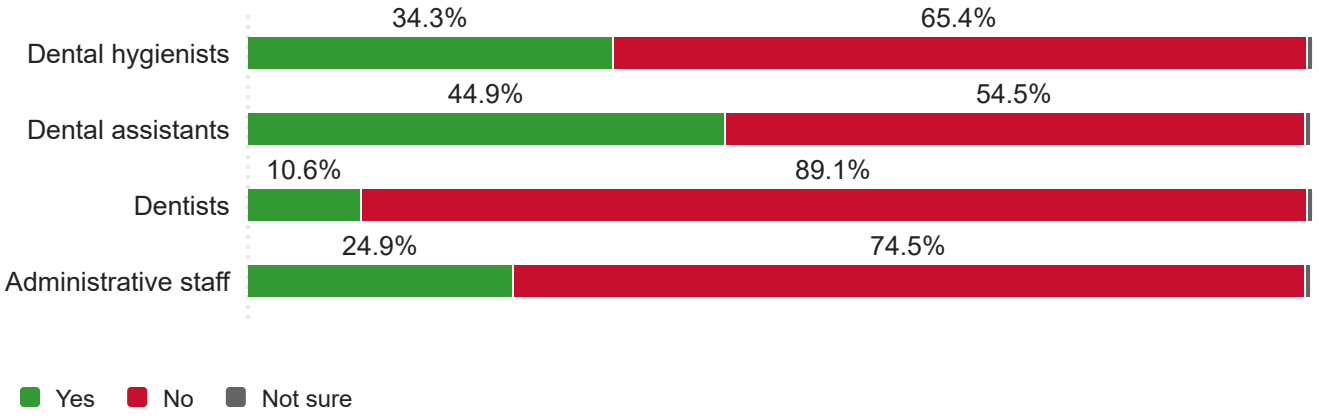
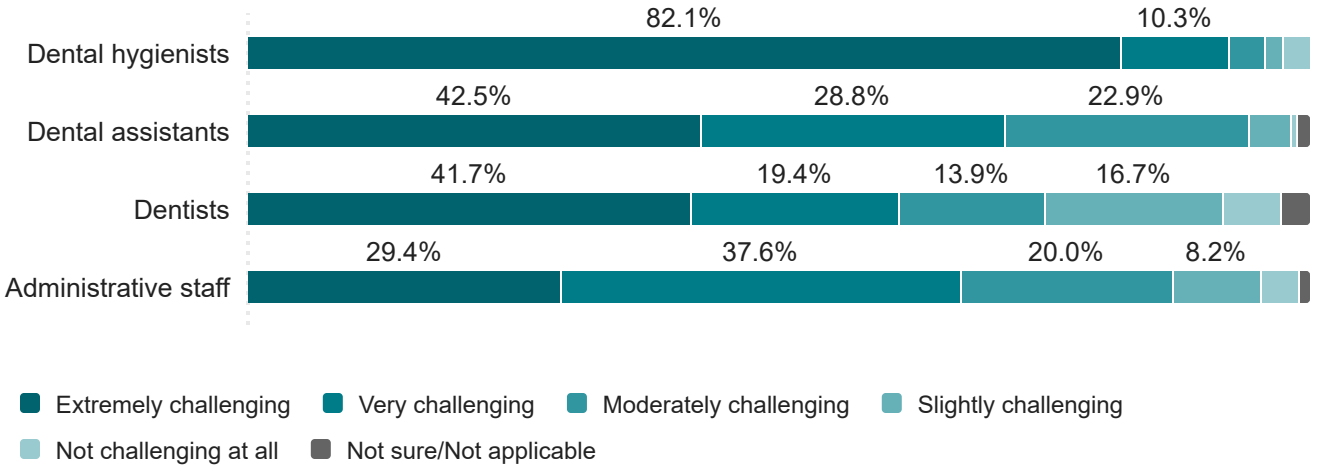
BY SEX (continued)

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?



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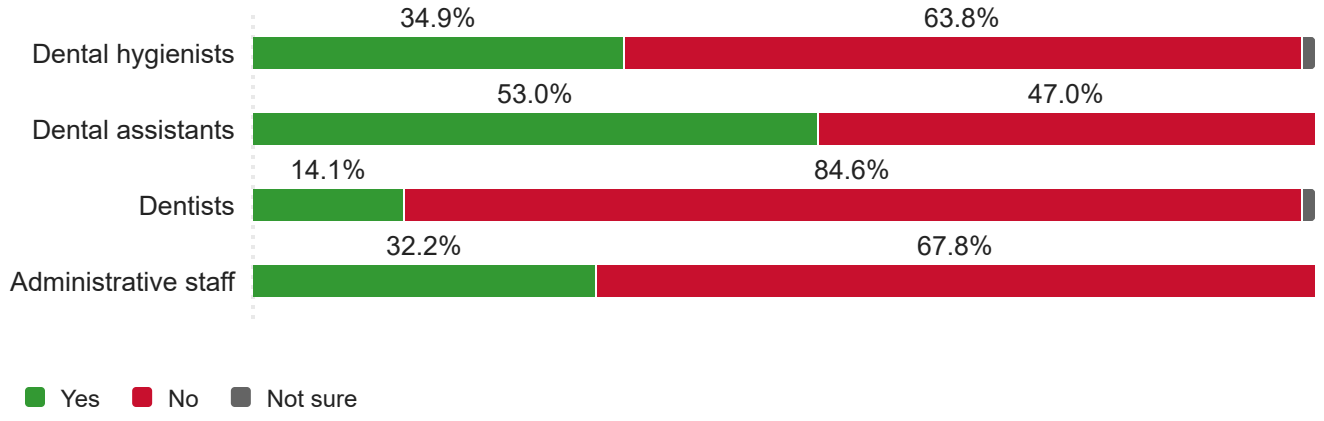
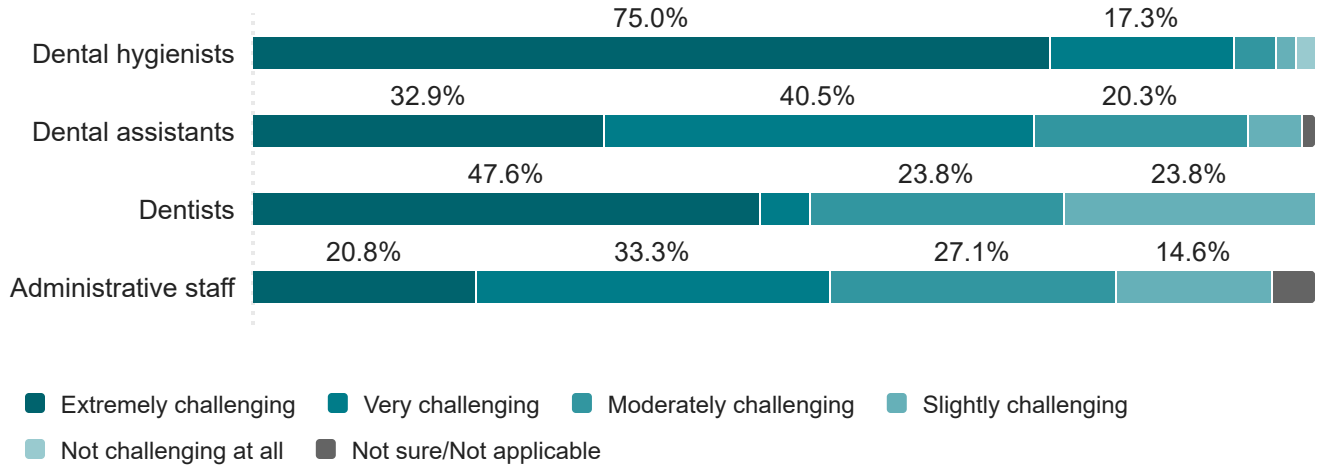
BY AGE GROUP

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?



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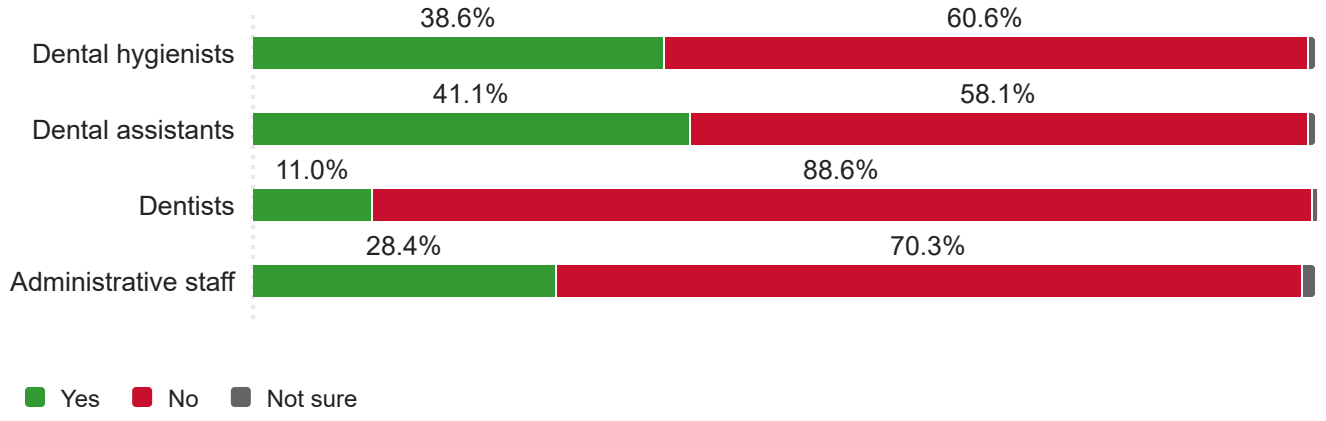
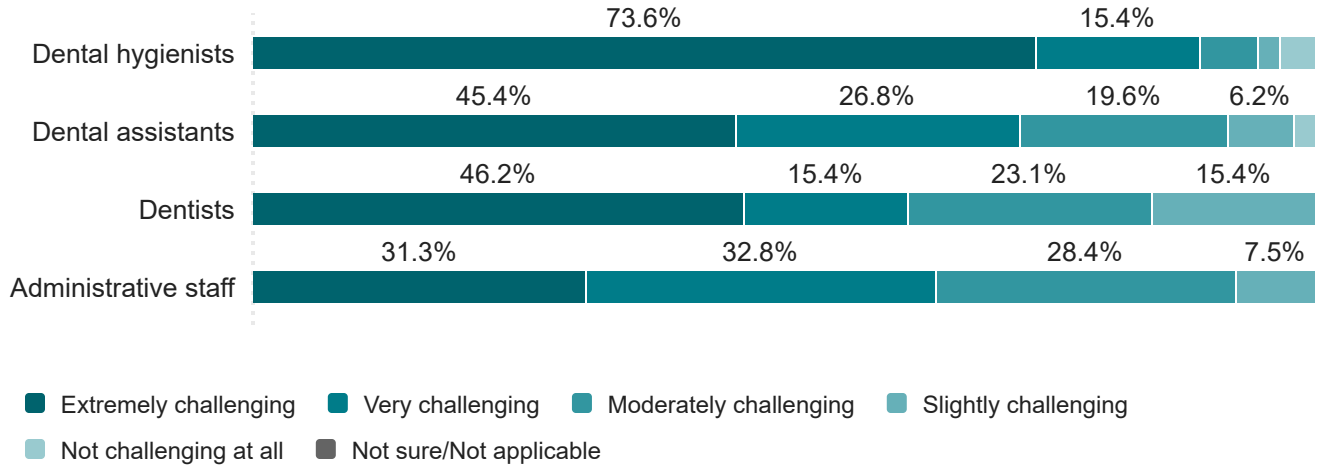
BY AGE GROUP (continued)

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?



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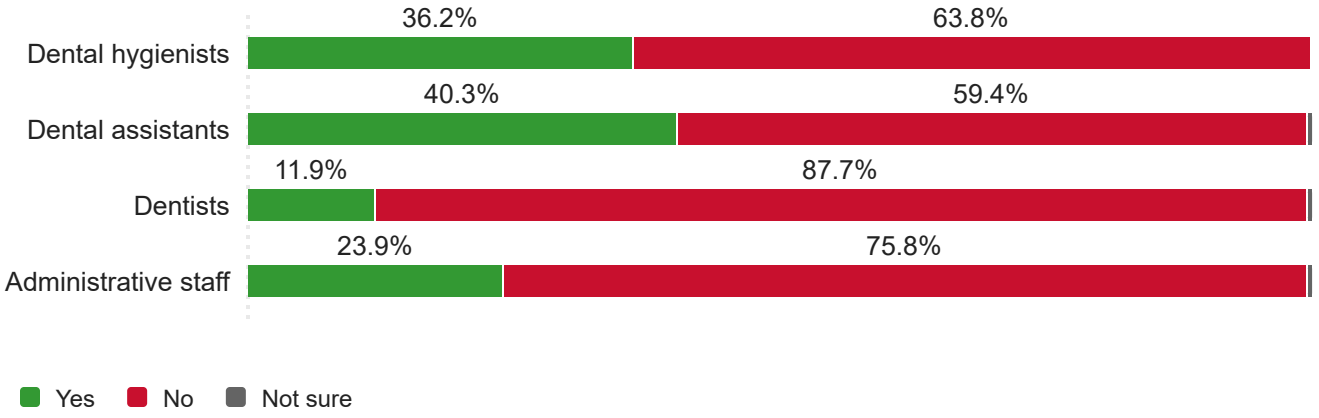
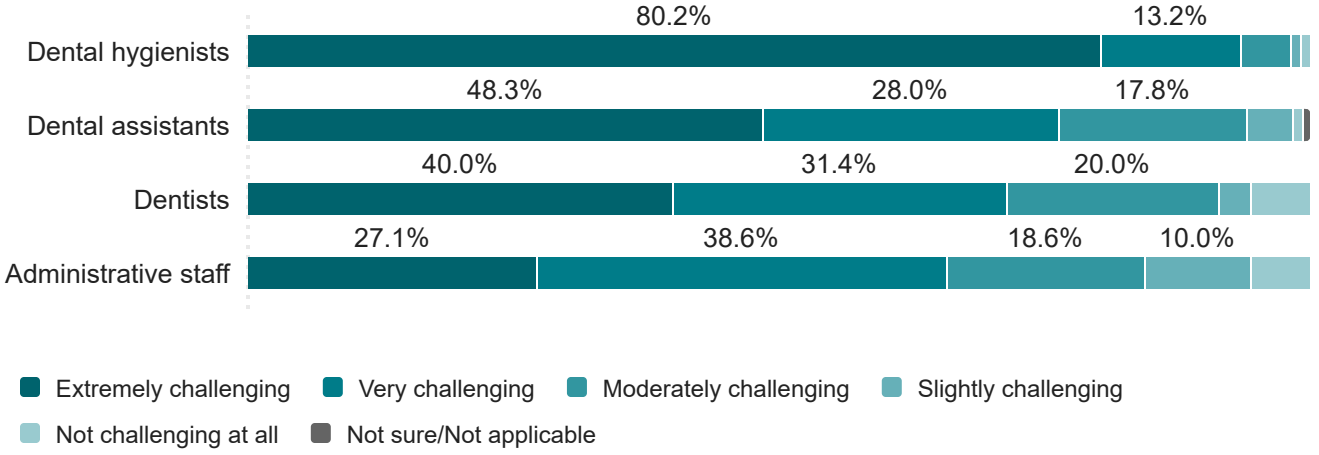
BY AGE GROUP (continued)

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?



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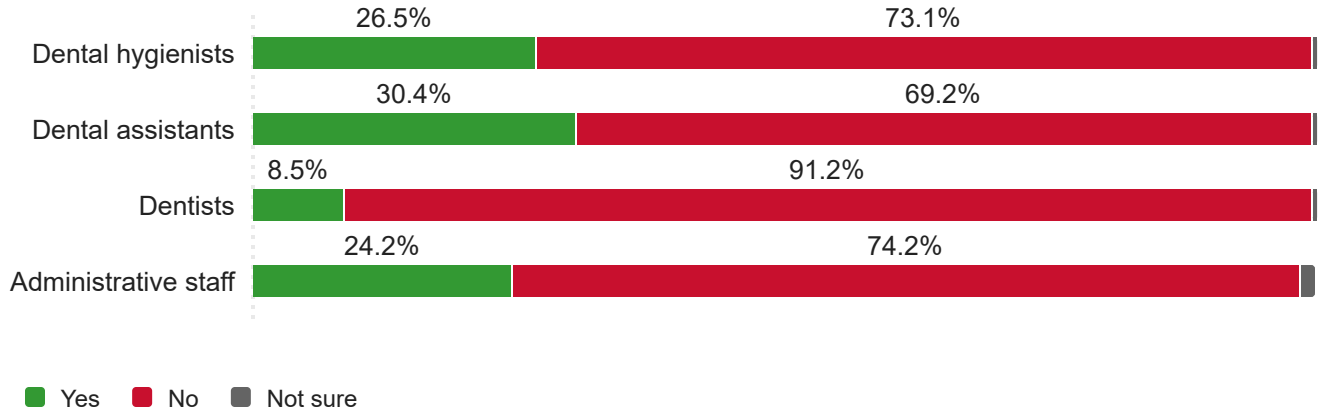
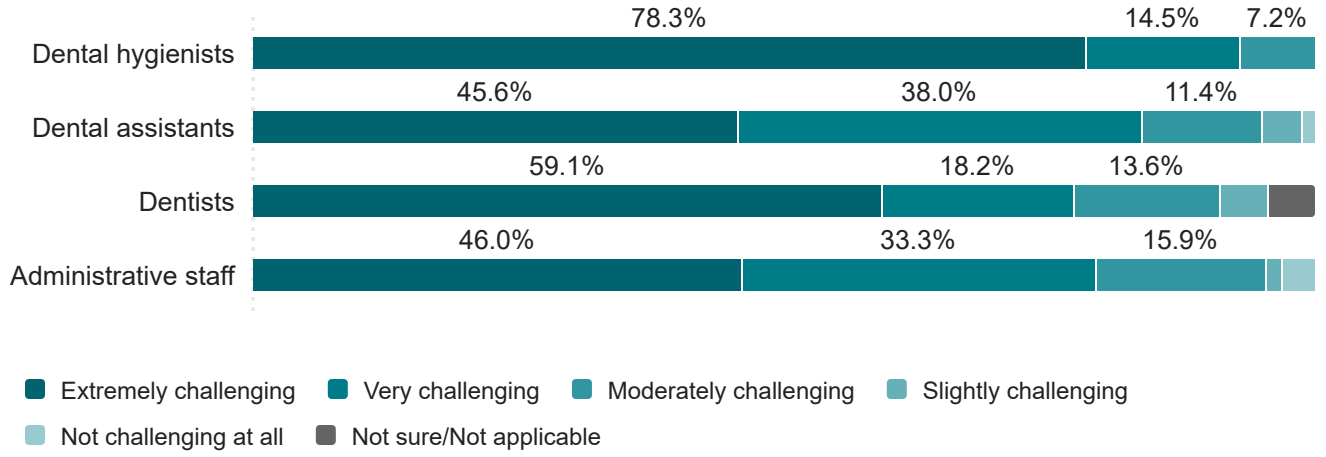
BY AGE GROUP (continued)

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?



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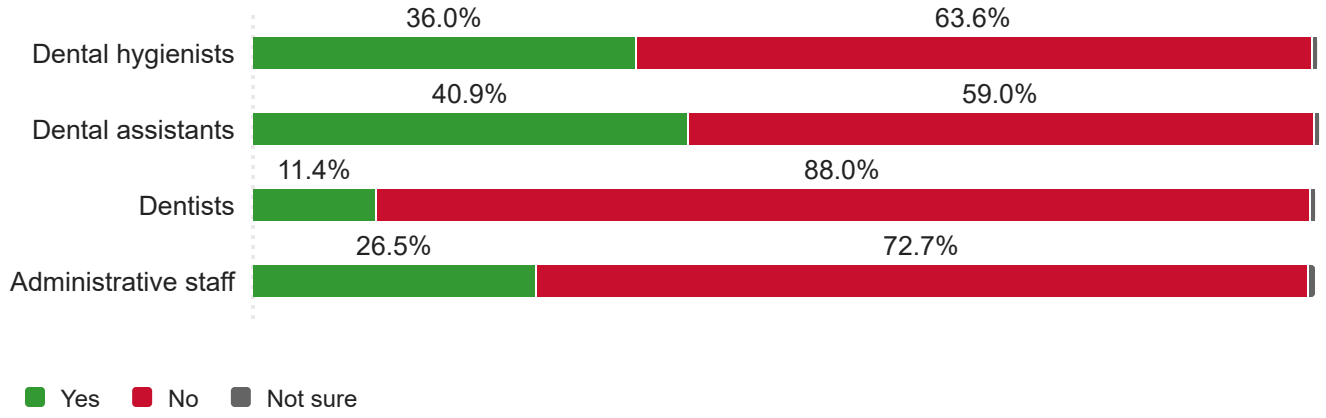
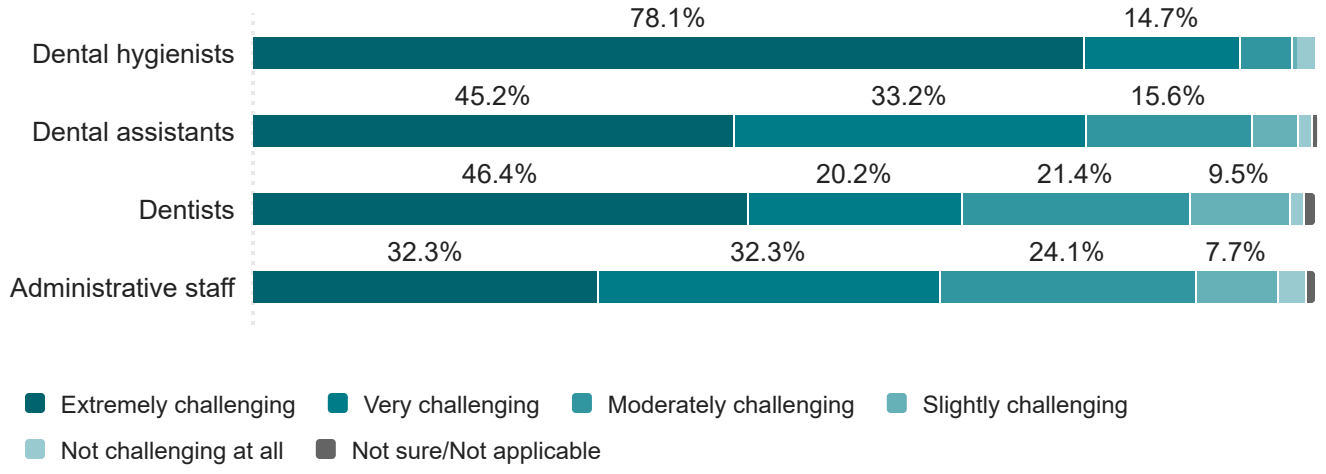
BY RACE/ETHNICITY

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?



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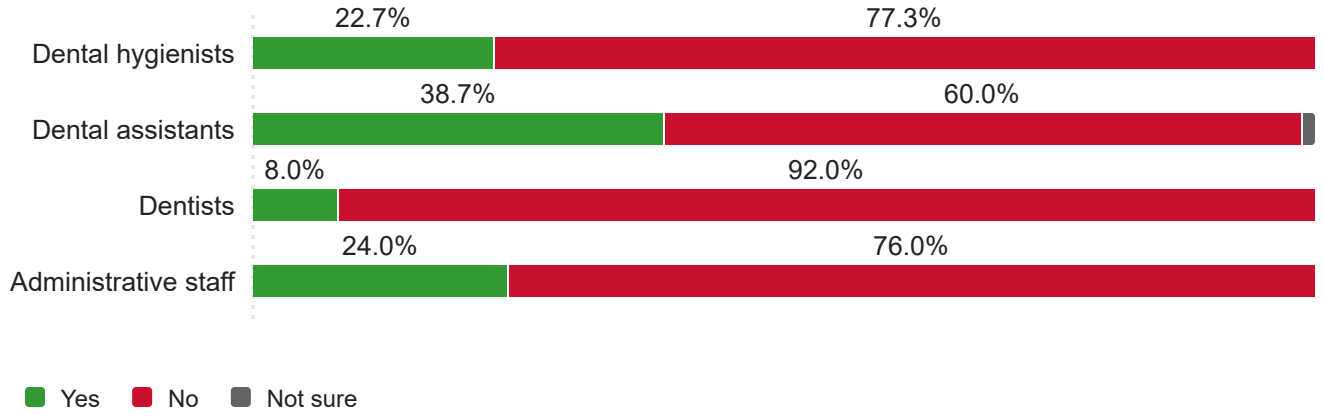
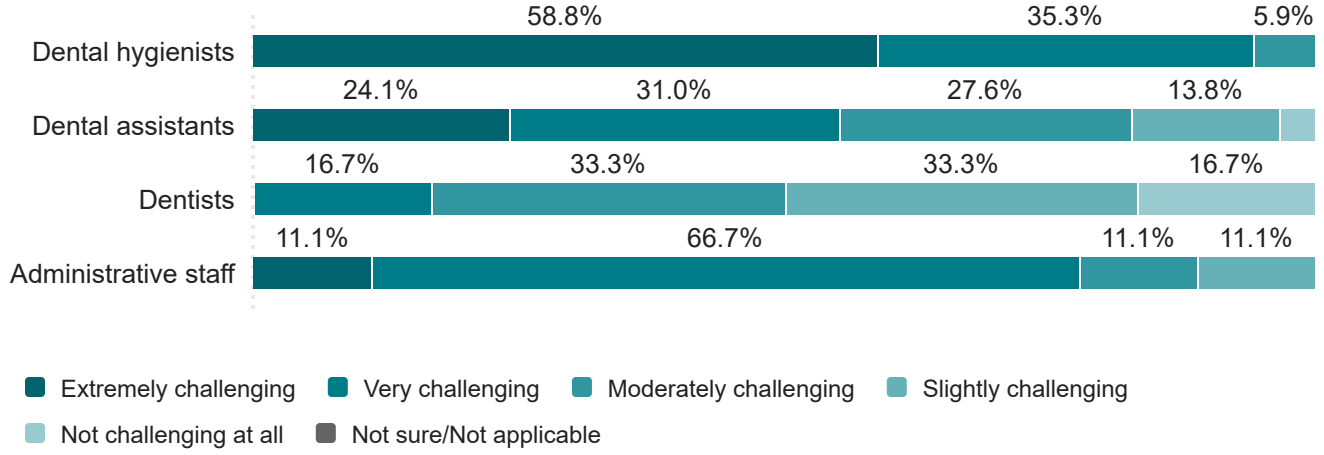
BY RACE/ETHNICITY (continued)

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?



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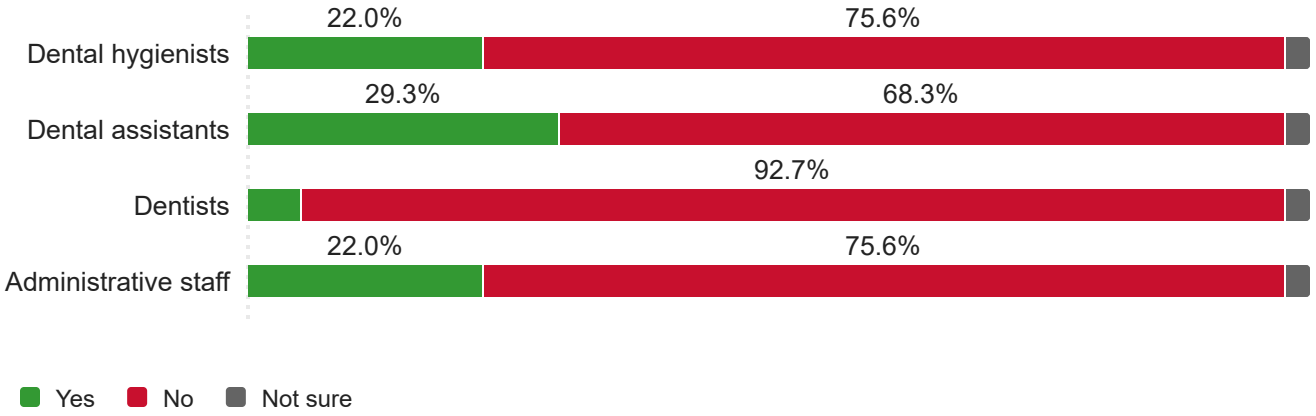
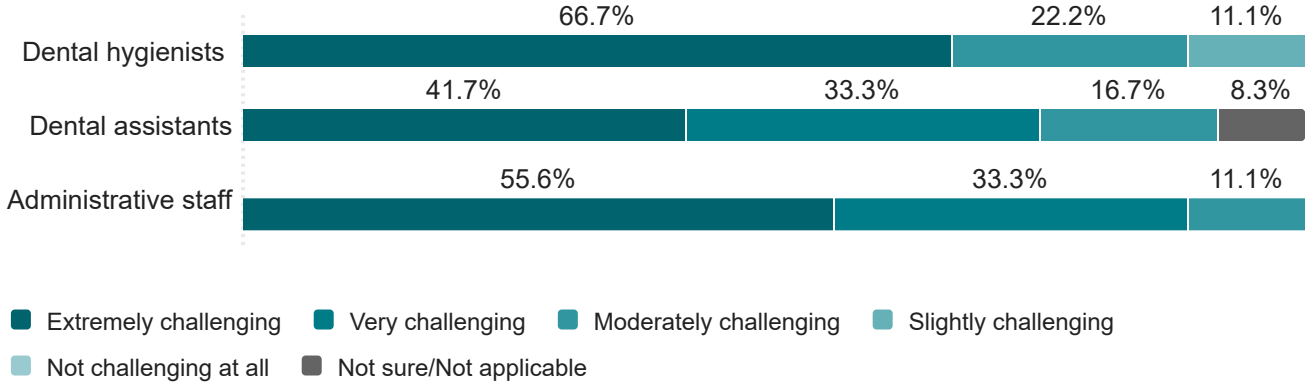
BY RACE/ETHNICITY (continued)

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?



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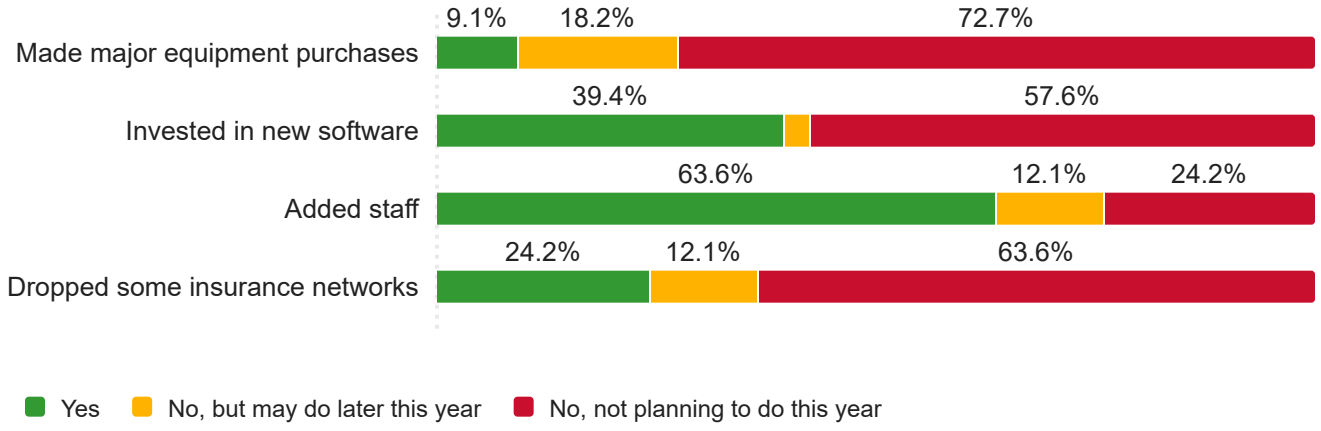
Recent Practice Decisions

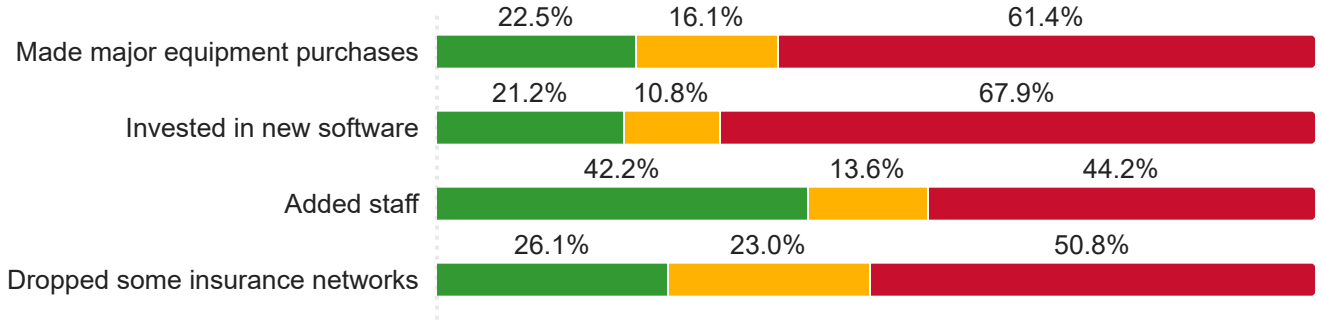
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

By DSO Affiliation

DSO



Non-DSO



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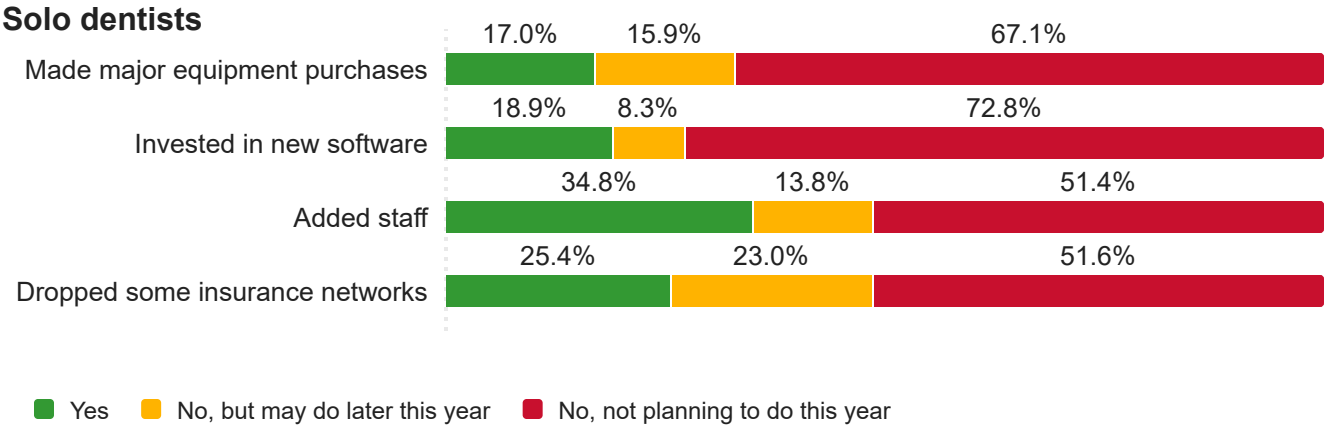
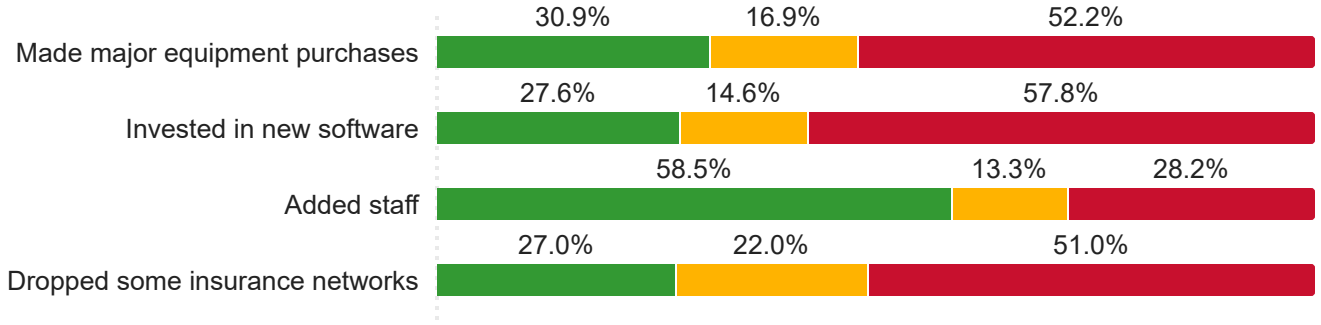
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

By Practice Size

Solo dentists



2 to 9 dentists



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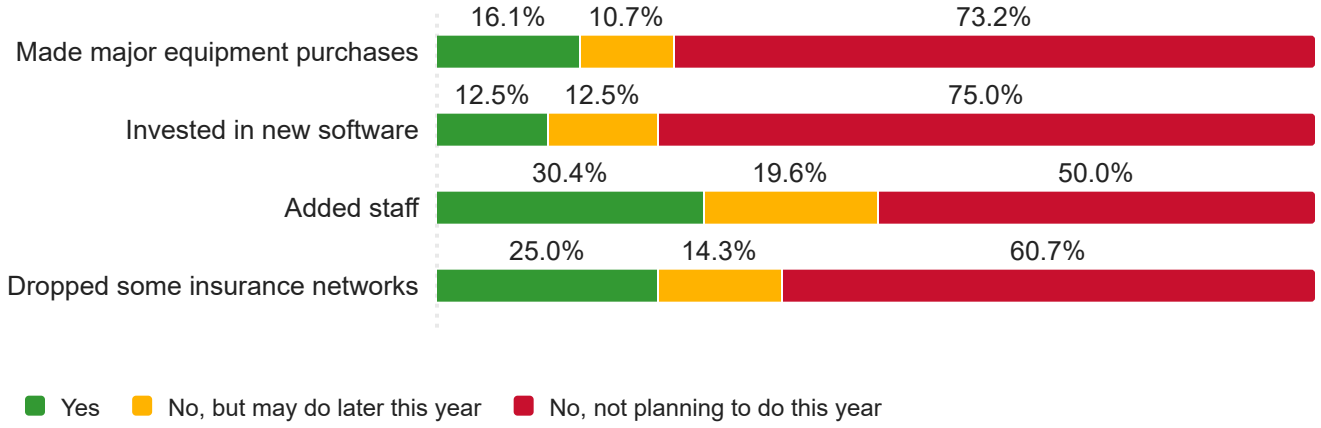
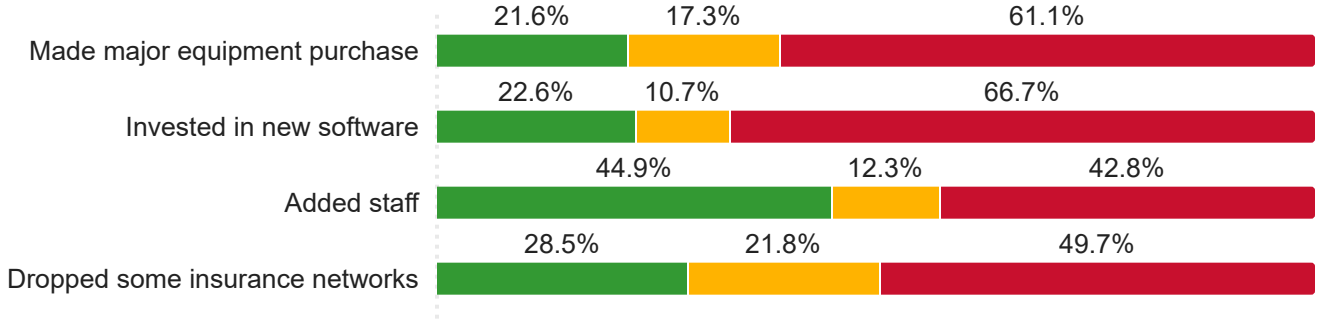
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

By Geography

Top 20 cities



Other urban



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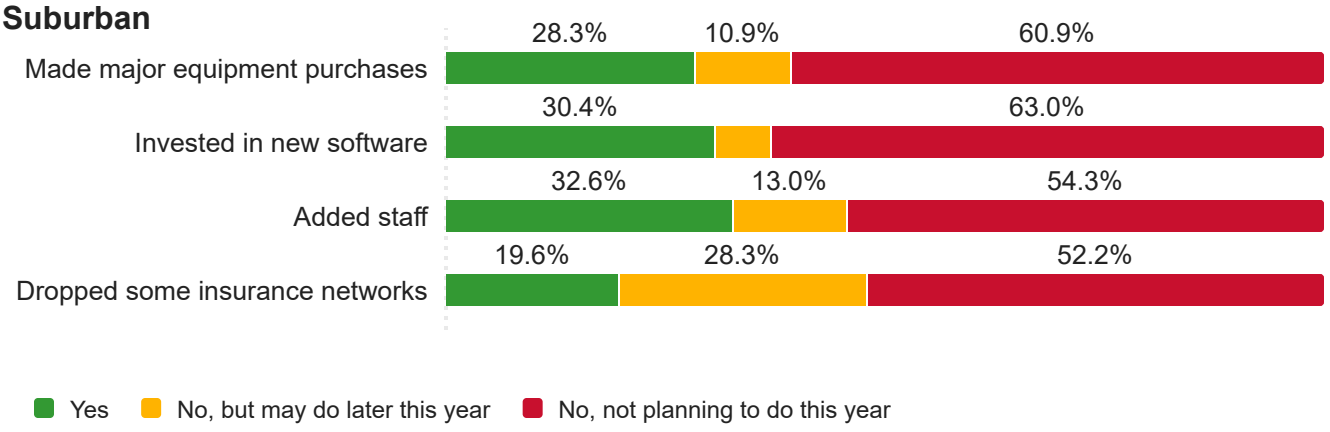
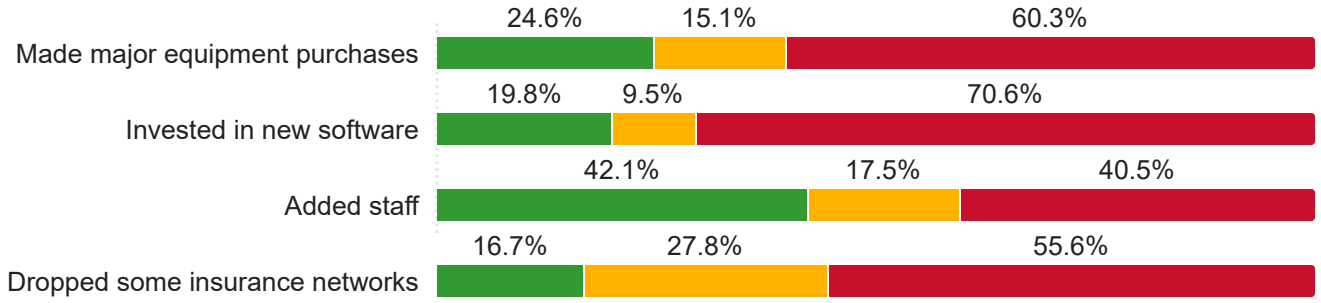
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

By Geography (continued)

Suburban



Rural



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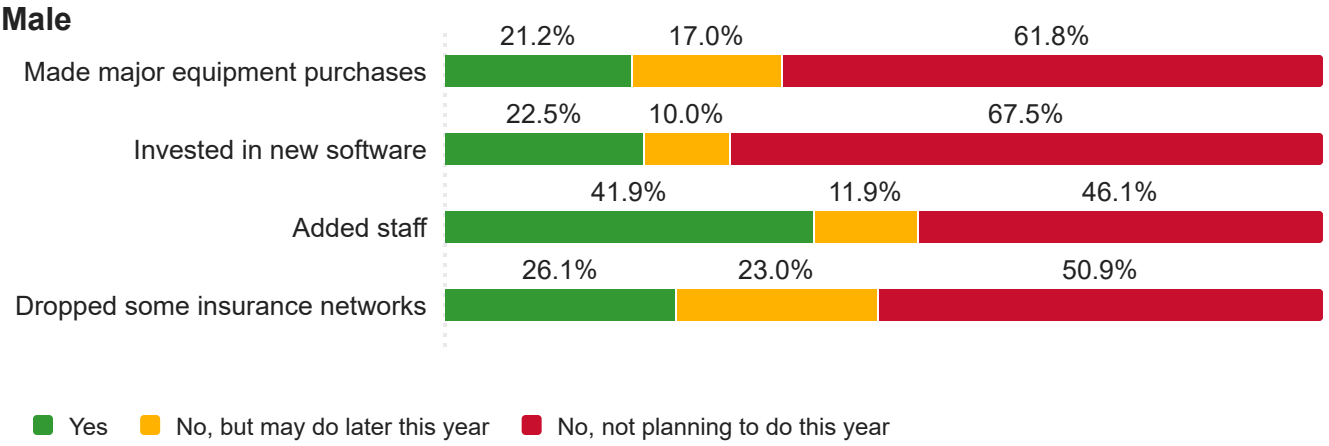
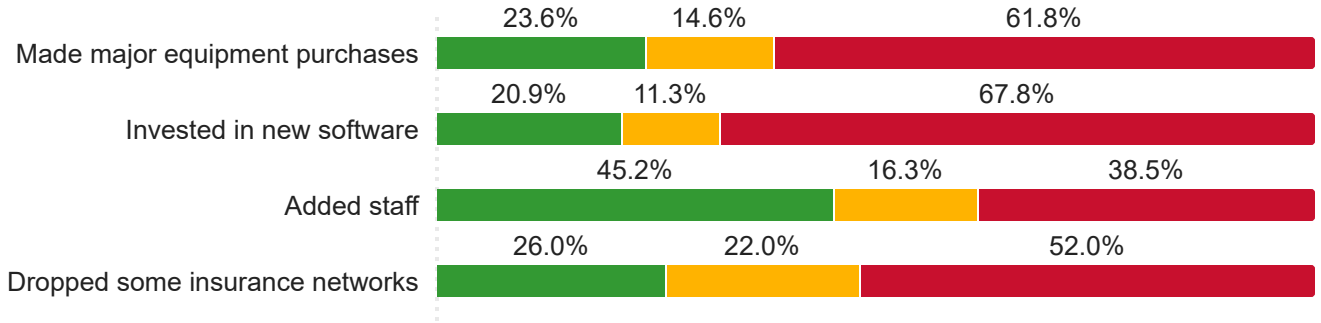
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

By Sex

Male



Female



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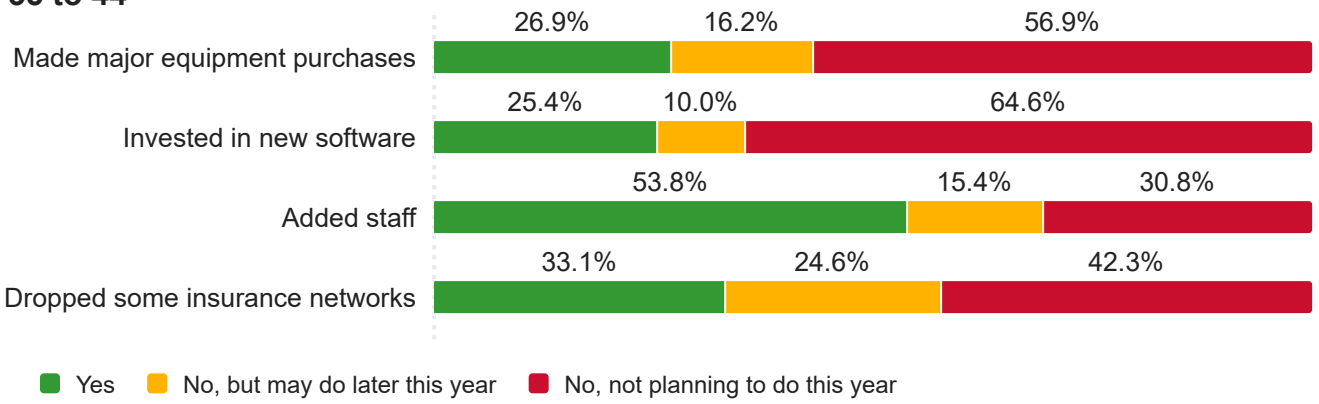
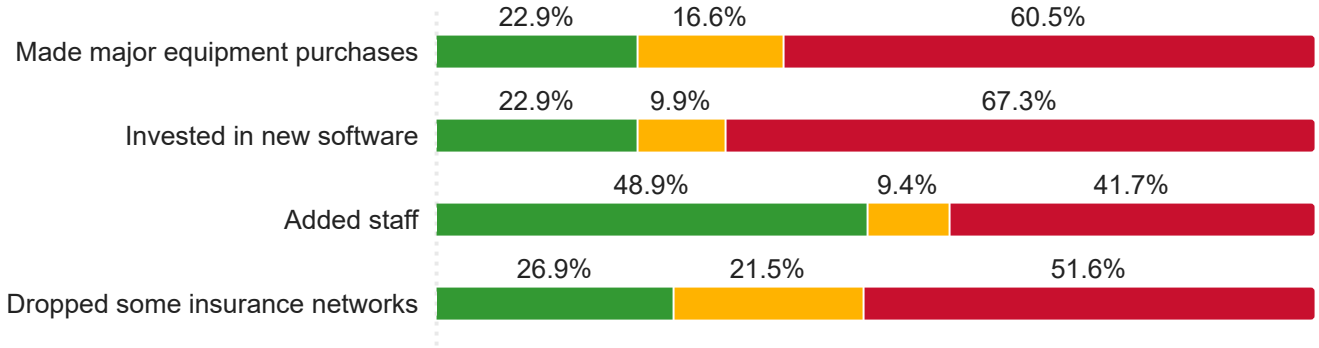
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

By Age

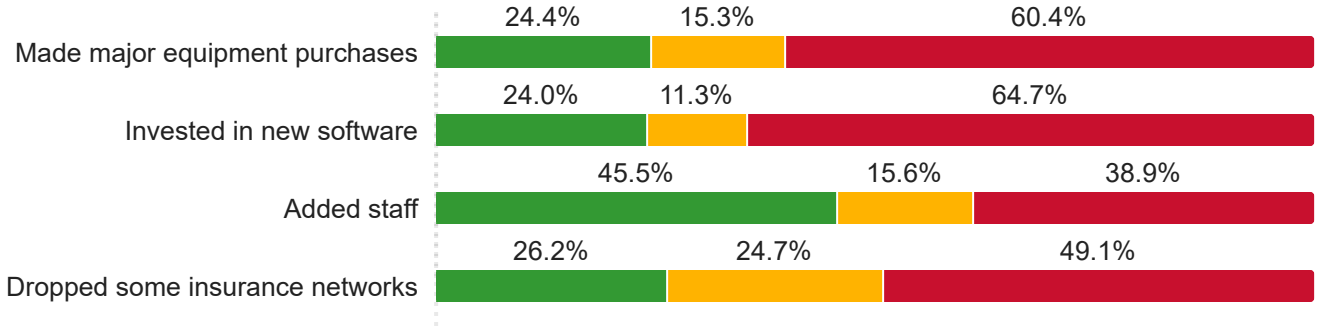
35 to 44



45 to 54



55 to 64



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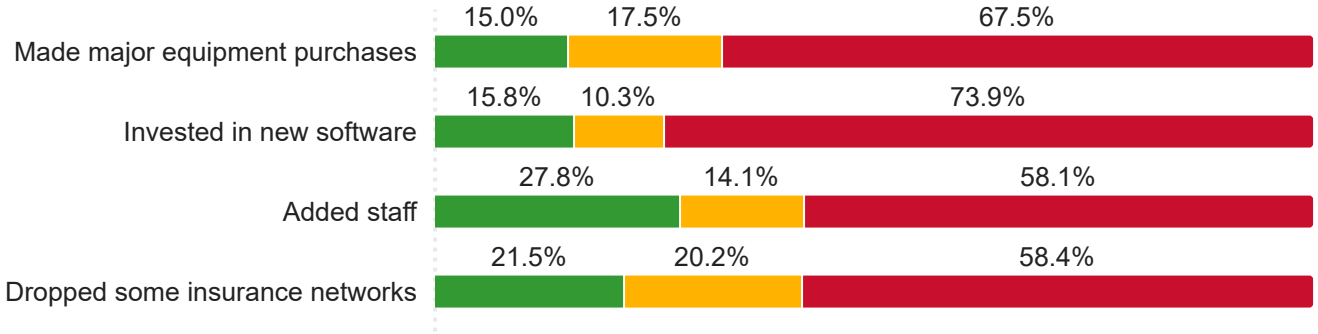
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

By Age (continued)

65 or older



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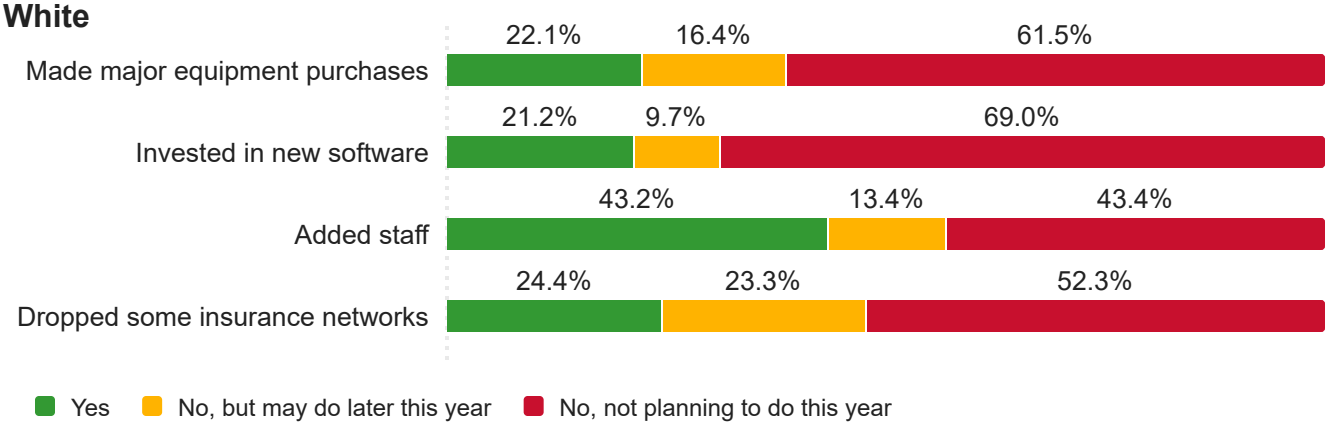
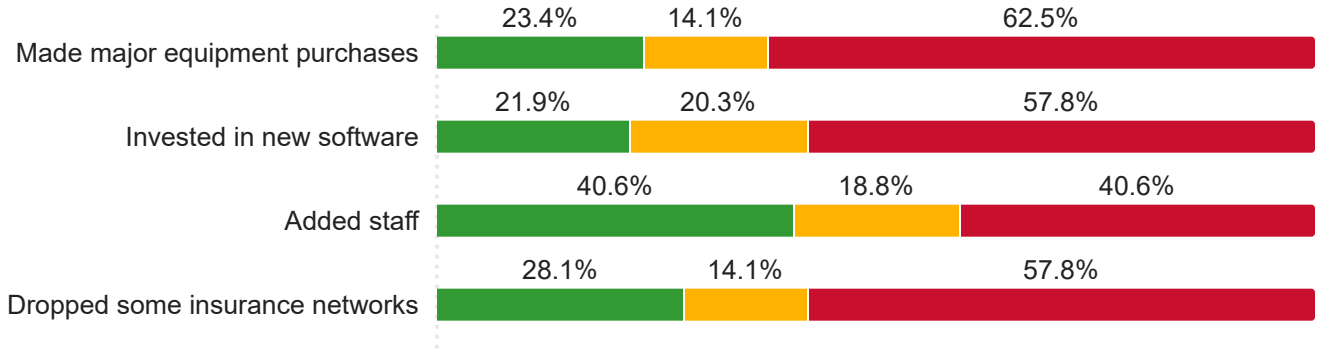
[Owner dentists] Since the beginning of 2024, have you done any of the following in your practice?

By Race/Ethnicity

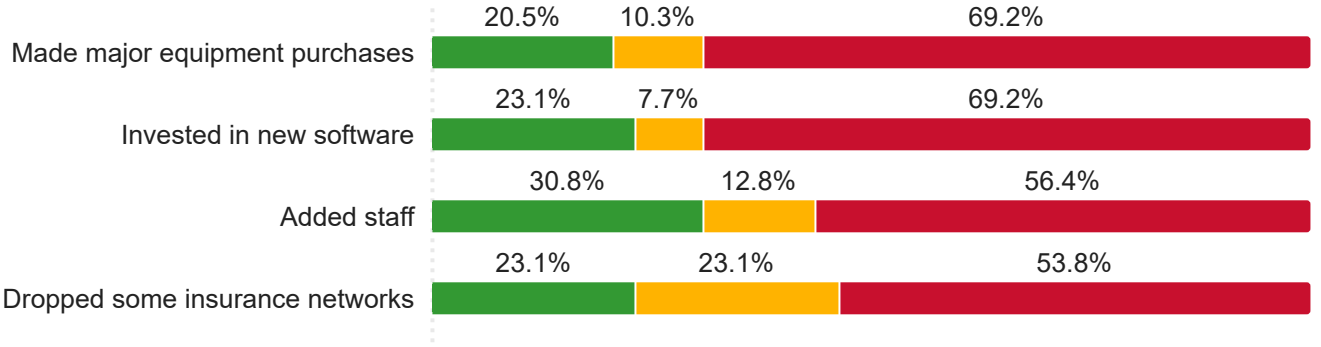
White



Asian



Hispanic



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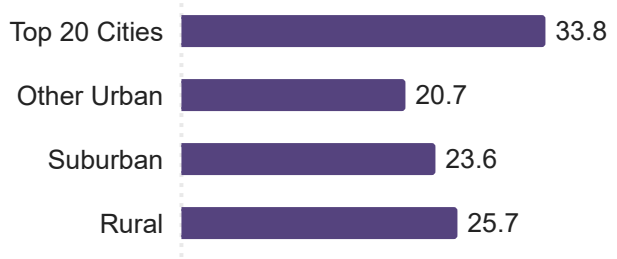
Insurance Network Drops

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

By DSO Affiliation

By Practice Size

By Geography



By Sex

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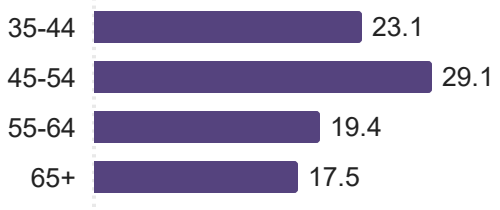
[If dropped out of dental networks] Approximately what percentage of the patient base were in the insurance networks your practice dropped out of since the beginning of 2024?

By Age Group



By Race/Ethnicity

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Quarter-Specific Questions

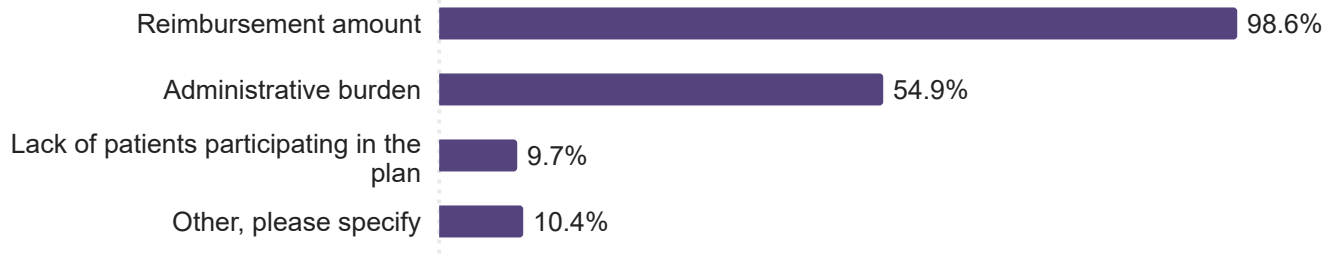
Reasons for Insurance Network Drops

Please indicate why you dropped out of the dental insurance networks. (Select all that apply.)

By Practice Size

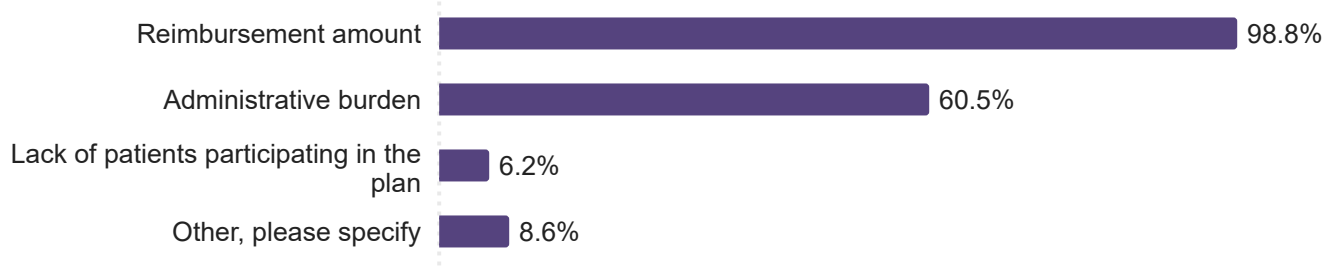
Solo dentists

144 Responses



2 to 9 dentists

81 Responses



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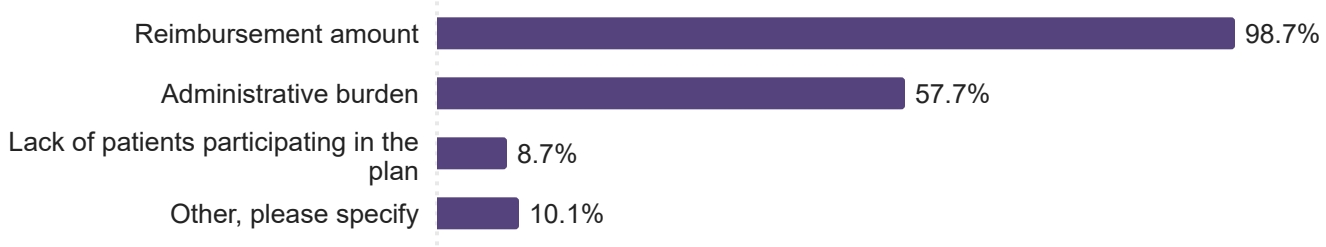
Please indicate why you dropped out of the dental insurance networks. (Select all that apply.)

By Sex

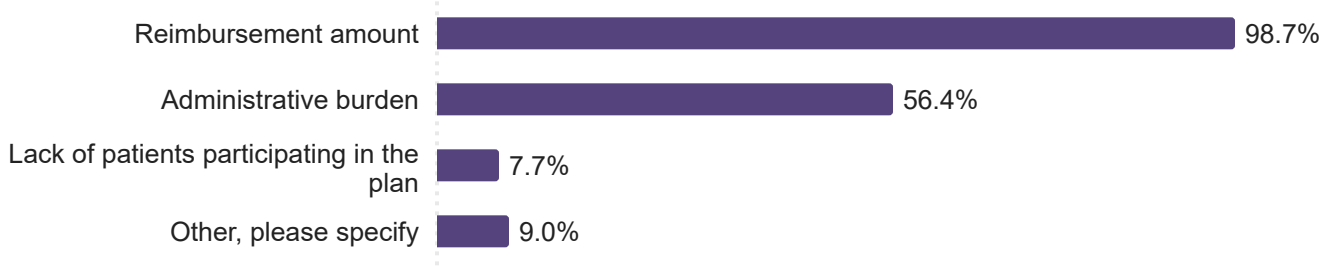
Male

149 Responses



Female

78 Responses



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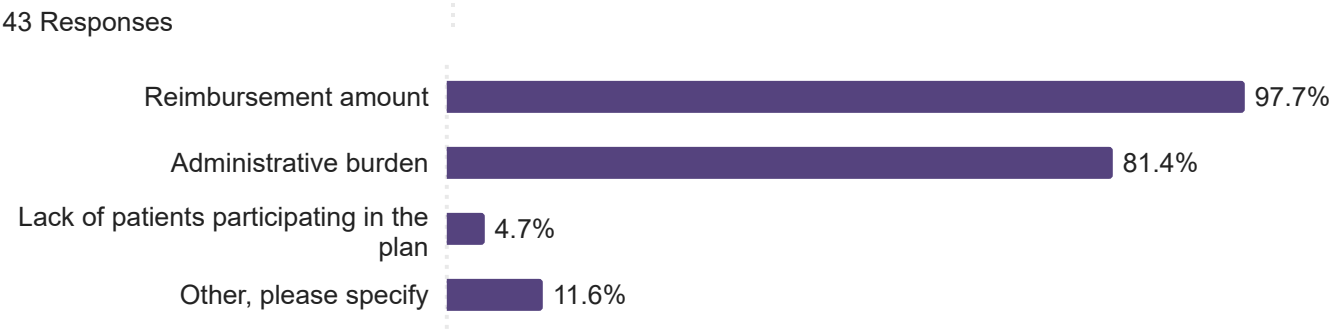
Please indicate why you dropped out of the dental insurance networks. (Select all that apply.)

By Age Group

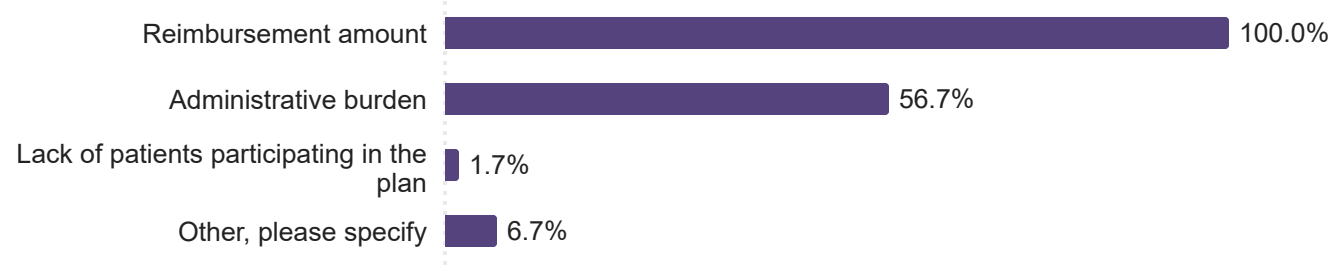
35 to 44

43 Responses



45 to 54

60 Responses



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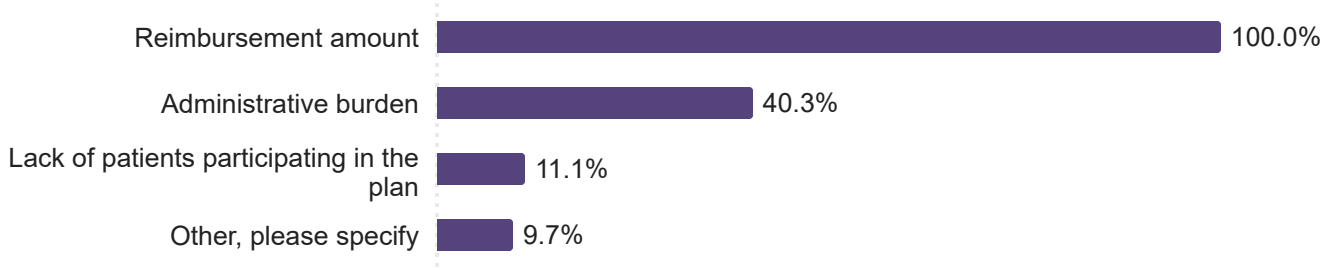
Please indicate why you dropped out of the dental insurance networks. (Select all that apply.)

By Age Group (continued)

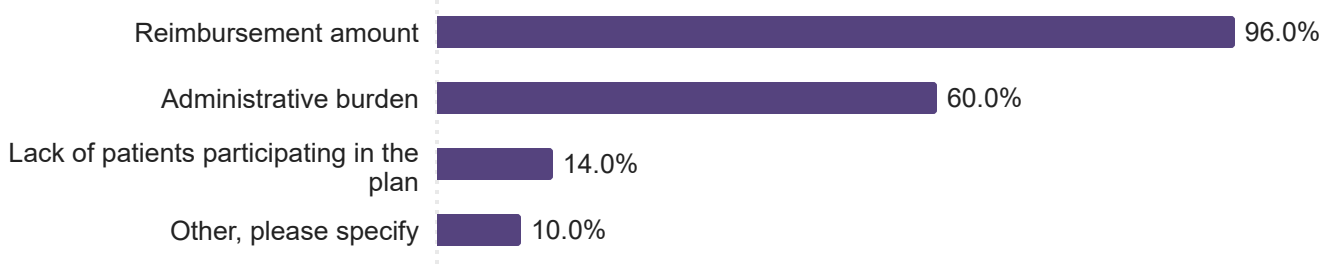
55 to 64

72 Responses



65 or older

50 Responses



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Number of Responses from Dentists in Private Practice by Wave

Wave	Responses
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
2023OCT	1,020
2023NOV	977
2023DEC	923
2024MAR	915
2024JUN	853
2024SEP	953

Number of Responses by Group - Week of September 16, 2024

Ownership Status	Choice Count
Owner dentist (i.e., sole owner, partner, or shareholder)	872
Employee dentist (nonowner)	37
Associate dentist (nonowner)	24
Independent contractor	19
Other, please specify	1

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Number of Responses by Group - Week of September 16, 2024 (continued)

DSO Affiliation	Choice Count
DSO	56
Non-DSO	897

Practice Size	Choice Count
Solo dentists	579
2 to 9 dentists	367
Large group (10+ dentists)	7

Geography	Choice Count
Top 20 Cities	65
Other Urban	698
Suburban	50
Rural	139

Sex	Choice Count
Male	611
Female	341

Age Group	Choice Count
<35	14
35-44	149
45-54	236
55-64	293
65+	261

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Number of Responses by Group - Week of September 16, 2024 (continued)

Race/Ethnicity	Choice Count
White	737
Asian	75
Hispanic	41
Black	8
Native Hawaiian / Pacific Islander	3
American Indian / Alaska Native	4
Other	14
Prefer not to say	1
Unknown	68

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