

Economic Outlook and Emerging Issues in Dentistry

Insights from Data from Q3 2024

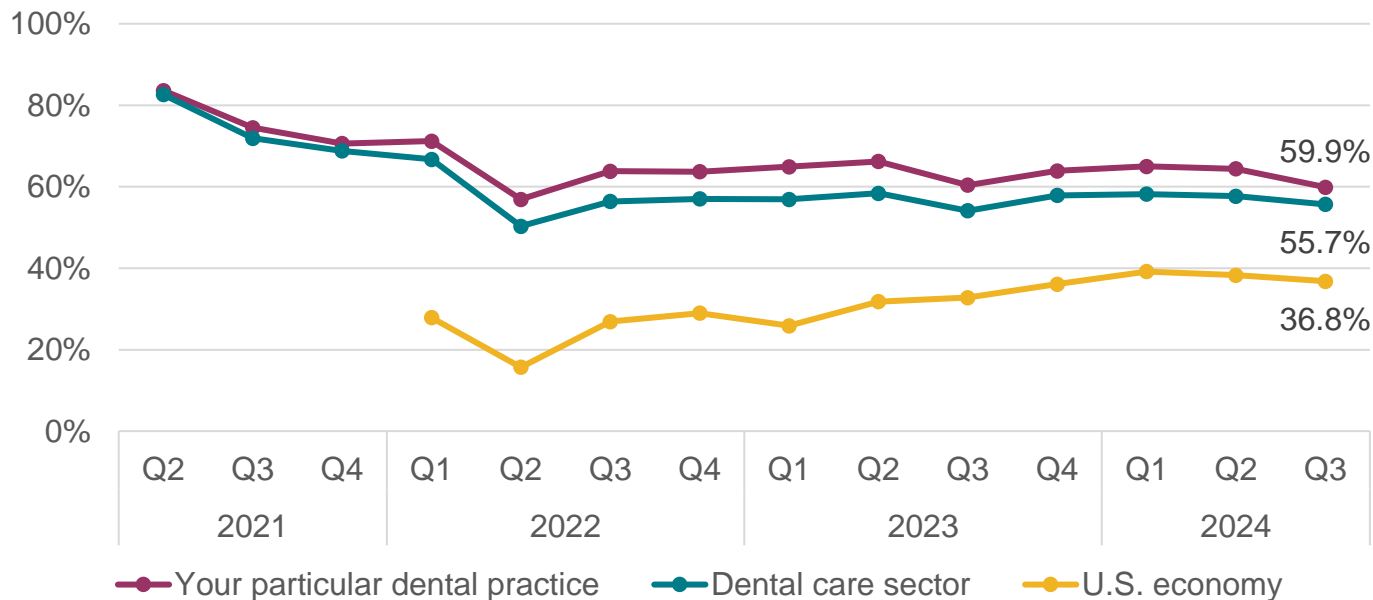
Emerging Issues Polling

- Measuring the ongoing impact of the COVID-19 pandemic and other emerging issues in dentistry
- Over 3,000 dentists have opted to participate to date; 953 dentists in private practice participated in Q3 2024
- Data was collected September 16 – 22, 2024
- Core measures: economic outlook, patient wait times, busyness levels, recruitment needs and challenges, recent practice decisions, percentage of patients lost to dropped insurance networks
- Questions of the quarter: Reasons for dropping out of insurance networks
- 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.)

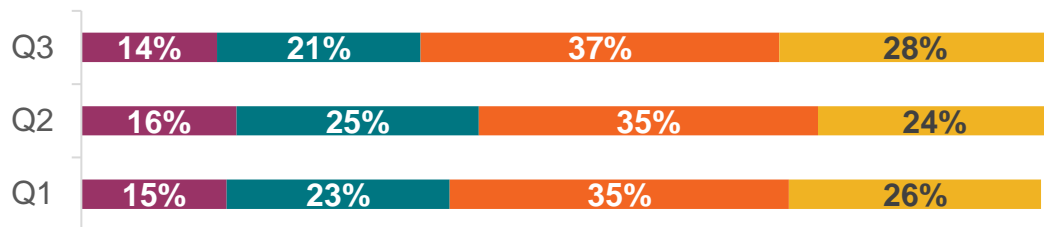


Dentists' confidence in the U.S. economy has been steady throughout 2024. Dentists' confidence in their own dental practices and the dental care sector has been steady for even longer.

*See Slide 12 for details about how the wording of this question changed starting Q1 2024.

Busyness

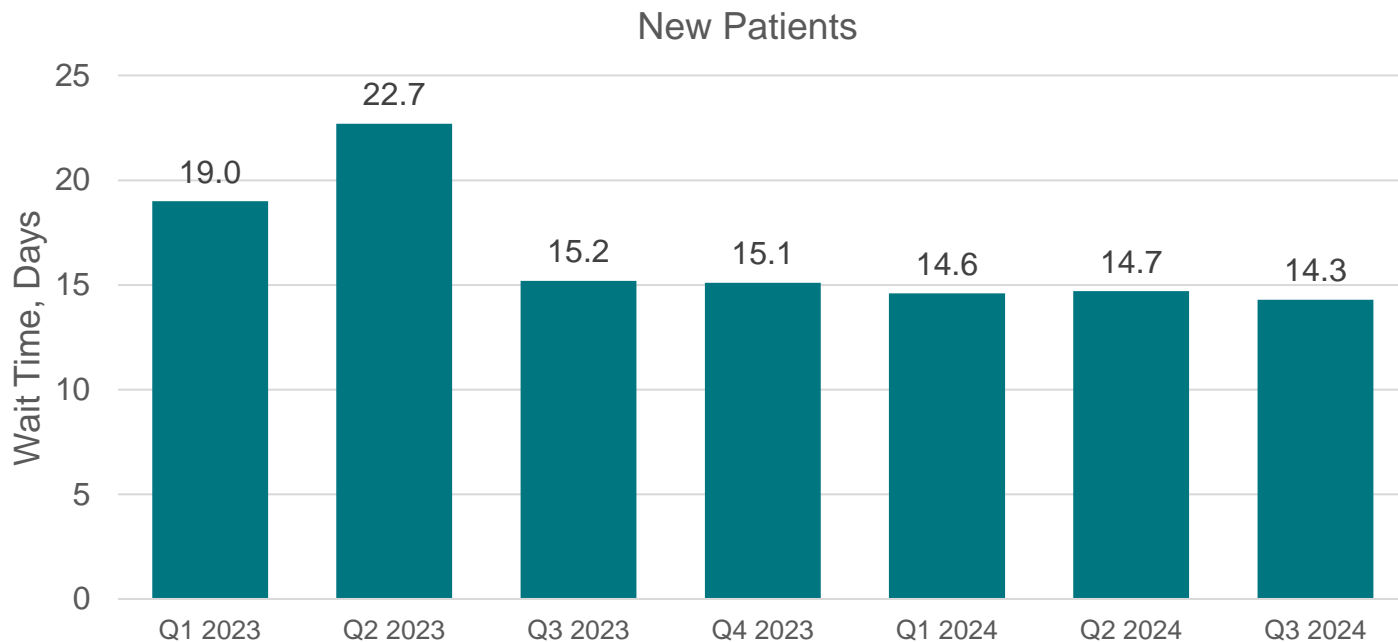
Which of the following best describe your general busyness level over the last 3 months?



- 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 Q3 2024, a smaller proportion of dentists reported being too busy to treat all patients or being overworked when compared to responses from Q2 2024. More than one-quarter report they are not busy enough and could have treated more patients.

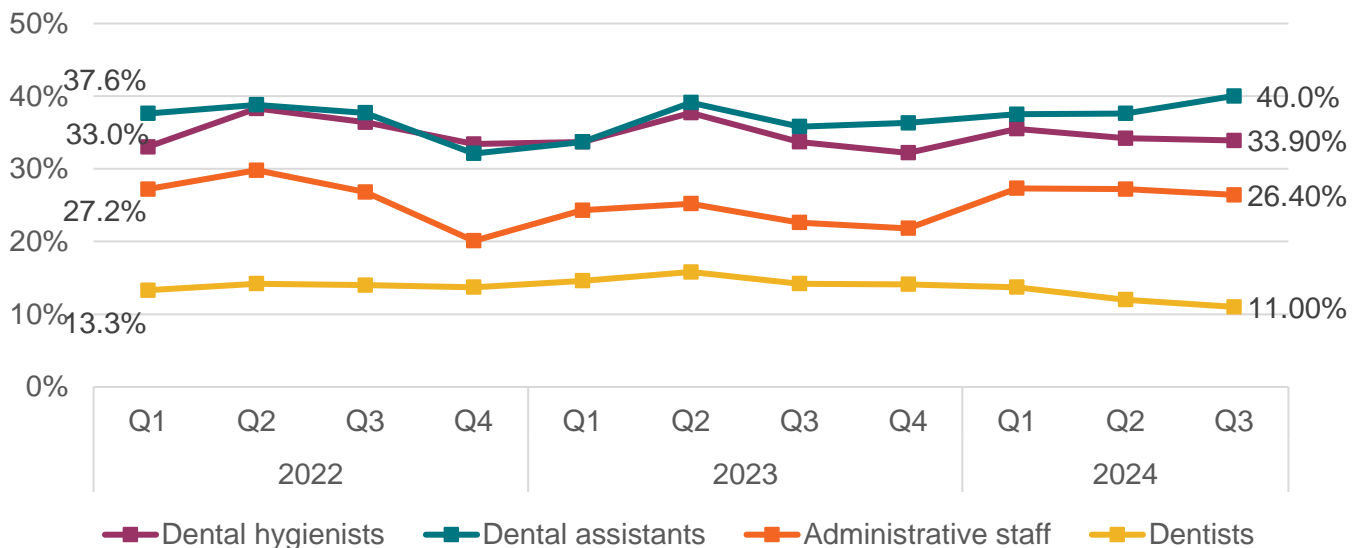
Average Wait Times



As of Q3 2024, wait times for new patients for an initial appointment is around 14 business days, down from 23 business days in Q2 2023.

Dental Team Recruitment

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

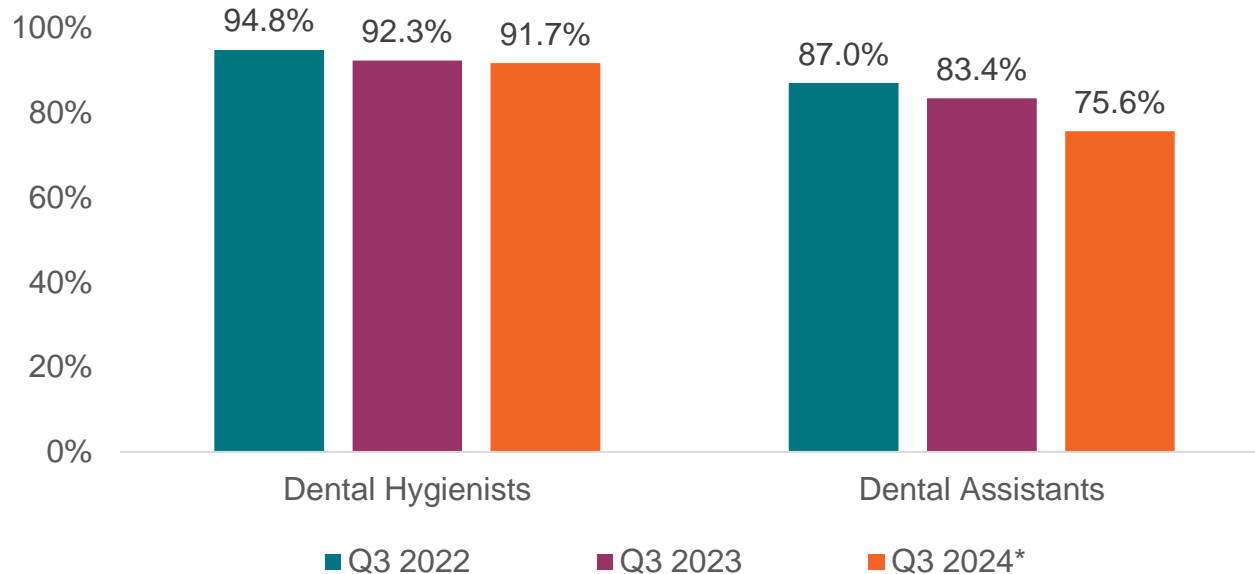


Recruitment needs remain around the same compared to two years ago; more than one-third of dentists are recruiting DHs and DAs.

*See Slide 12 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? (Percentage indicating “Extremely Challenging” and “Very Challenging”)

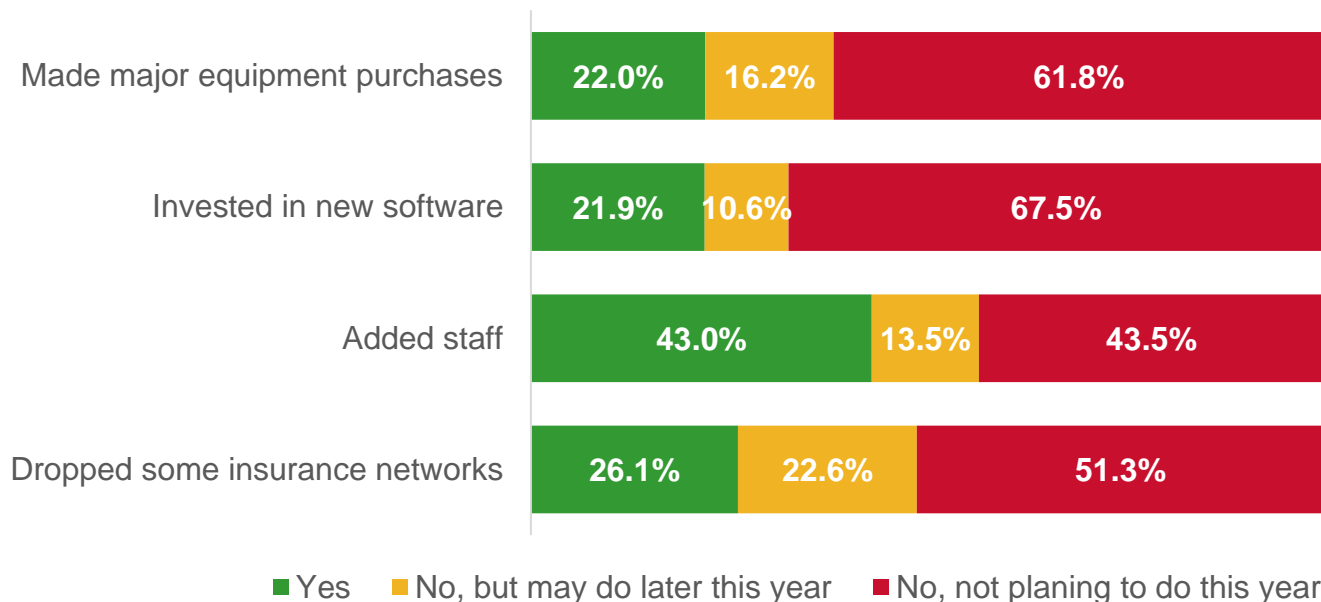


Among dentists who were recruiting at the time of the survey or at any time during the last 3 months, perceived difficulty in recruiting is slightly less than it was one year ago, more so for assistants.

*See Slide 12 for details about how the wording of this question changed starting Q1 2024.

Recent Practice Decisions

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

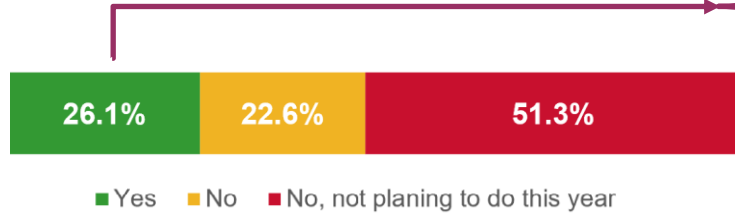


More than two in five dentists reported that they have added staff since the beginning of 2024. Another one-quarter said they have dropped out of some insurance networks.

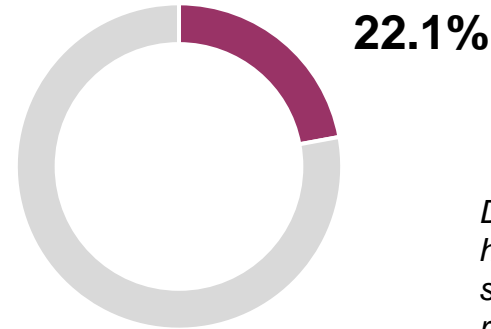
Insurance Networks

[Owner dentists] Since the beginning of 2024, has your practice...

Dropped some insurance networks



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

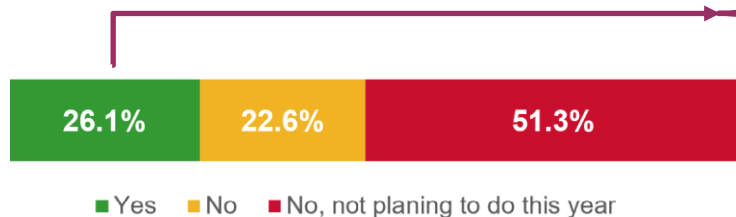


Dentists who reported having dropped out of some insurance networks reported that around one-fifth of their patient base belong to the dropped networks.

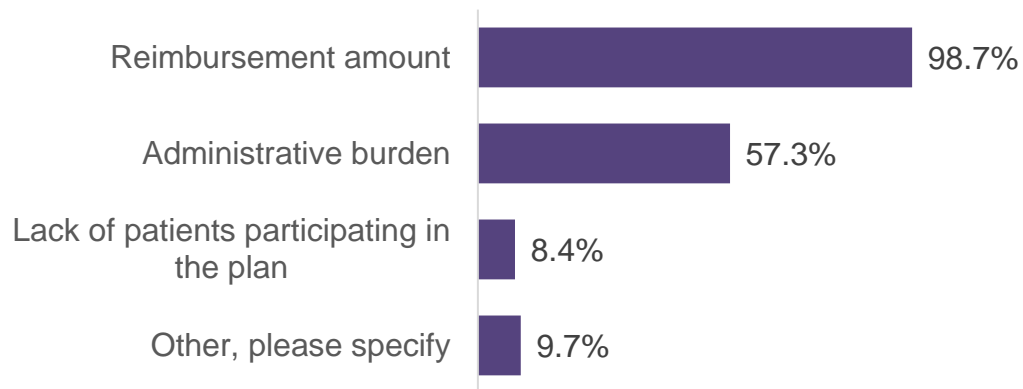
Insurance Networks

[Owner dentists] Since the beginning of 2024, has your practice...

Dropped some insurance networks



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



Nearly all dentists reported that reimbursement amount was the deciding factor for dropping insurance networks.

Key Takeaways

- **Confidence:** Dentists' confidence the U.S. economy, the dental sector, and their own practice has been steady so far this year.
- **Busyness:** Around one-third of dentists (35%) report that they were too busy to treat all patients requesting care in the past three months or that they treated all patients but were overworked, down from 41% in Q2 2024. By contrast, 28% of dentists report that they were not busy enough and could have treated more patients. Thirty-seven percent of dentists report a balanced level of busyness (i.e., treated all patients and *not* overworked).
- **Wait times:** In Q3 2024, the average wait time for new patients seeking an initial appointment is 14.3 business days, down from 22.7 business days in Q2 2023.
- **Recruitment needs:** The number of dentists actively recruiting dental hygienists and dental assistants is around the same as it was two years ago. Dentists continue to say recruitment is very or extremely challenging, although to a lesser degree compared to one year ago.
- **Dropping insurance networks:** Around one-quarter (26%) of dentists indicated that since the beginning of 2024, they have dropped out of some insurance networks. Nearly all dentists who have dropped some insurance networks reported that they did so due to reimbursement amounts and half did so due to administrative burdens.

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?***”

Thank you!

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