



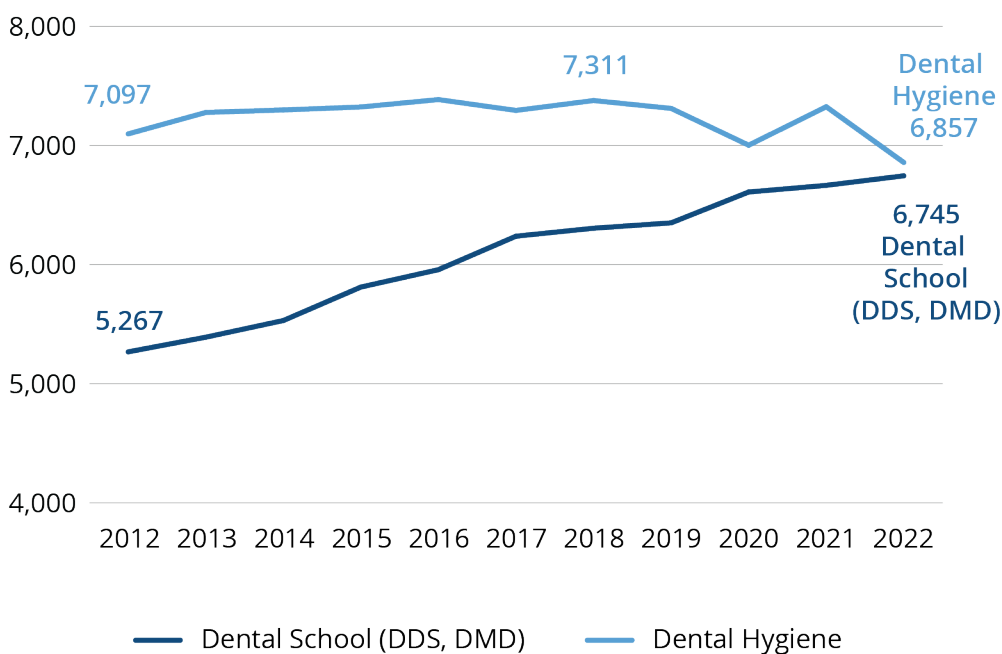
The State of Dentistry – Economic and Demographic Trends Impacting the Industry in 2024

New Report Commissioned by the Association of Dental Support Organizations Finds Shortage of Hygienists and Assistants, Increasing Diversity of New Dentists and Generational Change in Practice Preference Among Oral Health Trends to Watch in 2024

With 2024 off to a quick start, understanding and leveraging the top trends impacting dentistry will be critical to success in an increasingly dynamic industry. In this State of Dentistry: Economic and Demographic Trends Impacting the Industry in 2024 report, the Association of Dental Support Organizations shares the results of a multi-year research effort it commissioned by nonprofit research institute RTI International that revealed leading trends expected to shape the industry in 2024 and beyond. Many of these trends will be a continuation of those that dominated 2023 – from workforce challenges and cost pressures to increased diversity and an evolution in how dentists practice – as the industry continues to navigate an unprecedented transformation. The full report may be found [here](#). More information on RTI International and sources for this report may be found later in this document.

Top Trends

01 Bottlenecks in Dental Hygiene Programs



2012-2022

DENTAL SCHOOL GRADUATES

↑ 28%

DENTAL HYGIENISTS

↓ 3%

Workforce challenges – particularly those associated with recruiting and retaining dental hygienists and assistants – are not new to the industry, dating back prior to the COVID-19 pandemic.

But current bottlenecks in dental hygiene programs are exacerbating these challenges as we enter 2024 due to the **closure of multiple hygiene programs, increasingly stringent acceptance requirements and fewer seats available at existing programs**, according to the RTI report. As a result, while applications to dental hygiene programs increased to a high of over 43,000 in 2022, acceptance rates have since declined to 25% from 31% a decade earlier.

For additional perspective, while the number of new dental school graduates increased by 28% from 2012 to 2022, the number of dental hygienist graduates decreased by 3% over the same time period.

Additional workforce insights from the report include:

- ▶ While dentists tend to be concentrated in major metro areas across the U.S., early career hygienists are more evenly distributed geographically across states. That may be partially due to lower costs of living driving hygienists towards less densely populated areas.
- ▶ The pipeline for new dental hygienists is most robust in the country's most populated states: California (700), Texas (540), New York (482) and Florida (364).
- ▶ According to the Bureau of Labor Statistics, 2022 median annual salaries in the United States were \$81,400 for dental hygienists and \$44,820 for dental assistants.

The findings add to recent learnings from other industry leaders related to the dental professional shortage, including an October 2022 report from the Health Policy Institute (HPI) of the American Dental Association. That [report](#) found that approximately one-third of dental assistants (33.7%) and dental hygienists (31.4%) expect to retire in five years or less, further exacerbating the industry's workforce challenges in both the near and long term. To retain both dental assistants and hygienists, practices must provide work-life balance, positive workplace culture and the ability to help patients, according to the HPI report.

The shortage of dental assistants across the United States is equally challenging. The same HPI [report](#) found that vacant positions in dental assisting and dental hygiene have reduced dental practice capacity by an estimated 10% nationally. "Enrollment in dental assisting programs has been trending downward since 2015, and the pandemic had a negative impact on dental hygiene program enrollment," according to the report. "While there has been some recovery of enrollment in dental hygiene programs, data suggest that dental assisting program enrollment will not rebound in the near future. As a result, workforce shortages are likely to remain an issue for years to come."

One year ago, the ADSO launched its Workforce Task Force to help address staffing shortages in dental offices. Since then, the ADSO and the Task Force have made progress on a number of related initiatives, including a collaboration with the Dental Assisting National Board (DANB) to bring consistency across the states on education requirements for dental assistants; a partnership with the American Dental Hygienists' Association (ADHA) to remove barriers to entry and increase funding for hygiene training; and the launch of a pilot program that exposes dental students to DSOs through real-world clinical rotations at DSO practices.

“It's up to us all to ensure the pipeline for dental hygienists and assistants is sufficient to meet the growing demand for allied dental health professions. At the ADSO, we are continuing to work with our partners across the industry to strengthen the employment pipeline for dentists, hygienists and assistants so that every American has access to quality dental care when they need it, said Andrew Smith, Chief Executive Officer of the ADSO.

02 Increased Diversity Among New Dentists



**NEW DENTIST
GRADUATING
CLASS =**

20

**23 MOST
DIVERSE IN
HISTORY**

Research has shown that a diverse dental profession advances health equity, increases cultural competence and improves the oral health of unserved and underserved populations. While the profession has historically struggled with diversity among dentists, findings from the RTI report indicate recent progress in addressing this disparity.

The RTI report found the **2022 graduating class of new dentists to be the most racially and ethnically diverse in history, with 48% of students identifying as non-white.**

Recent graduates of dental schools are more diverse than both practicing dentists and the U.S. population as a whole. Additionally, 53% of graduates were women.

These findings reflect those from a **recent report** from the ADA Health Policy Institute's Survey of Dental Education, which found that the total share of dental students who are a racial/ethnic minority grew from 41.9% in 2018-19 to 44.8% in 2022-23, while the total share of white students dropped from 51.1% to 48.2%.

But while diversity is on the increase among dental students, there is still much work to be done for the industry to reflect the diversity of the people it serves. For example, the same HPI survey found that "certain racial and ethnic groups have seen their representation increase more than others. While the share of first-year Asian and Hispanic dental students increased between 2005 and 2020, the share of Black students stayed roughly the same."

“A diverse workforce brings different perspectives, cultural competency and new ideas that improve patient care and create an inclusive environment where everyone is able to grow and thrive, said Andrew Smith, Chief Executive Officer of the ADSO. This report shows we are making progress toward this important goal – and I am proud to say that is particularly true at dental support organizations, which continue to attract greater numbers of women and dentists of color than private practices.

An [article](#) in *The Journal of the American Dental Association* noted that remedying this disparity will require “addressing institutional culture, faculty privilege, and implicit bias and cultivating an intellectual and supportive environment for faculty and students... [and] having diverse leaders who serve as role models and policy makers who can bring observations using their unique lenses to craft more equitable public policy.”

03 Generational Change in How Dentists Practice

Number of Affiliated Locations in the Dental Practice	% of Dentists
100+ locations	9%
50-99 locations	2%
10-49 locations	3%
2-9 locations	10%
1 locations & more than 1 dentist	40%
Solo practice	36%
Percent of Dentists Affiliated with a Dental Support Organization (DSO)	13%

The COVID-19 pandemic resulted in many older dentists accelerating their retirement plans – with a 2022 [analysis](#) by the ADA’s Health Policy Institute finding that the average retirement age for dentists dropped to 67.9 years old in 2022, down from a peak of 69.1 in 2018.

With that generational change in dentistry comes another transformation for the industry – a change in HOW dentists practice. Data compiled by the RTI report found that **in 2023, only 36% of dentists were actively practicing in a solo practice. Most dentists were part of a group practice, while 13% reported affiliation with a DSO.**

The change is particularly pronounced among younger dentists, who are leading the charge with their preference towards group practices. Reflecting that preference, the RTI report found that – as in prior years – DSO affiliation in 2023 was most common among early career and women dentists.

In addition, younger dentists tend to begin their careers in more urban areas, according to the RTI report. For example, in Illinois, early career dentists are most concentrated in Chicago, while rural and smaller metro areas rely on an older workforce. Significant supply shortages persist in smaller and rural areas.

According to Marko Vujicic, chief economist and vice president of the ADA Health Policy Institute, “Bottom line, dentists are more and more likely to be in larger groups, to be affiliated with other locations, to be affiliated with companies that help them with the non-clinical side, and are less likely to be working alone.”

Andrew Smith, Chief Executive Officer of the ADSO, agrees:

“This move from solo practice to group or DSO dentistry, combined with advances in technology, medical-dental integration and evolving patient expectations, are revolutionizing dentistry as we know it – and DSOs are excited to be on the front lines during this transformational moment for our industry.



Additional Report Insights

▶ Growth in Supply of Dentists

From 2011 to 2021, the number of active dentists in the U.S. has increased by over 13,600 – a 7% increase in total, outpacing national population growth (6%).

- Growth in supply of dentists was most marked in North Carolina, Texas, Florida and Arizona, with declines in Ohio, Pennsylvania, New York and New Jersey.

▶ Supply of Dentists Varies by State

Supply of dentists ranges widely across the U.S., ranging from Massachusetts with 82 dentists per 100,000 to Georgia with 47.

- Over the decade from 2012 to 2022, states like North Carolina, Texas, Nevada, Florida, and Arizona saw the fastest growth in the U.S. but remain below the national average.
- Over the same decade, states like Pennsylvania, New York, and New Jersey remained above the national average but saw below-average growth or decline in supply of dentists.

▶ Decline in Dental Visits

Visits to the dentist declined in 2020-2021 and some indicators of oral health worsened as a result, including:

- Fewer children's teeth classified as "excellent" or "very good" – down to 76.8% in 2020-2021, from a high of 79.1% in 2018-2019.
- More children with tooth decay or cavities – up to 12.2% in 2020-2021 from 11.6% in 2018-2019.

▶ Increased Number of Dental School Graduates

New graduates of dental schools in the U.S. reached 6,745 in 2022, a 28% increase from a decade prior.

- There are now 66 CODA-accredited dental schools in the U.S., up from 56 in 2011. The new dental schools are in Arizona, California, Florida, Illinois, Maine, Missouri, New York, North Carolina and Utah.
- For the 2022-2023 school year, 56% of first-year enrollees in dental schools nationwide are women, and 51% are nonwhite.

▶ Startup Cost Challenges for New Dentists

The cost to open a new dental practice ranges from \$120,000 for a renovated office space to \$480,000 for new construction on average, according to SharpSheets. Equipment costs range from \$50,000 for a three-chair practice to \$70,000 for a six-chair practice.

▶ Rates of office consolidation are high across all states, with the average dental office employing more staff

Group practices are now the most common dental model as the traditional solo practice declines and more dentists opt for group or DSO-affiliated practices.

About the Report

This State of Industry research report was prepared by RTI International, an independent, nonprofit research institute with offices on four continents, on behalf of the Association of Dental Support Organizations. Since 2018, RTI's work on behalf of the ADSO has brought together various sources and methods to illustrate trends in dentistry across the country.

Sources include the following: U.S. Bureau of Labor Statistics, U.S. Centers for Disease Control and Prevention, American Dental Association Health Policy Institute, American Dental Association Commission on Dental Accreditation, U.S. Health Resources and Services Administration (HRSA), Wasserman Medical National Dental Advisory Service, State dental licensing boards, U.S. Department of Education, U.S. Census Bureau, Indeed.com and Community College Districts.