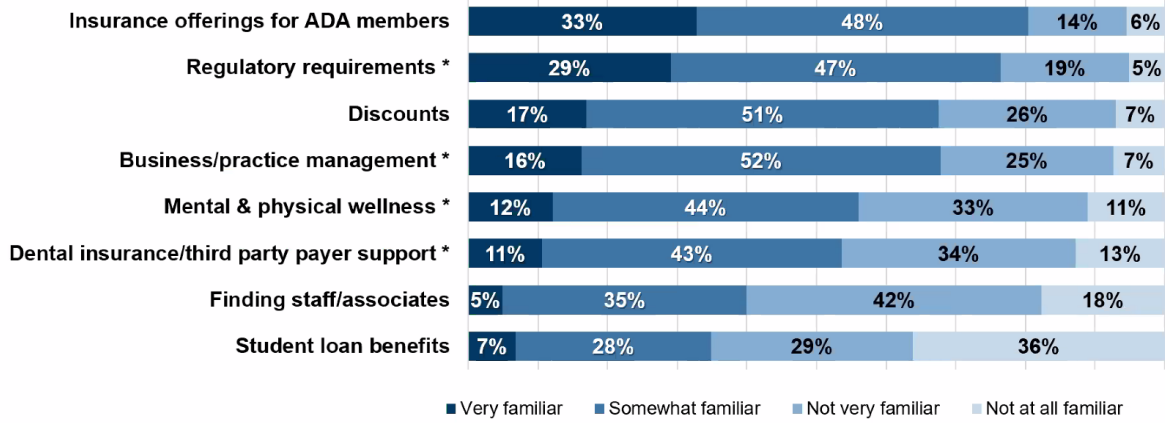


Opportunity to Increase Awareness of Resources

How familiar are you with the ADA resources for these topics?



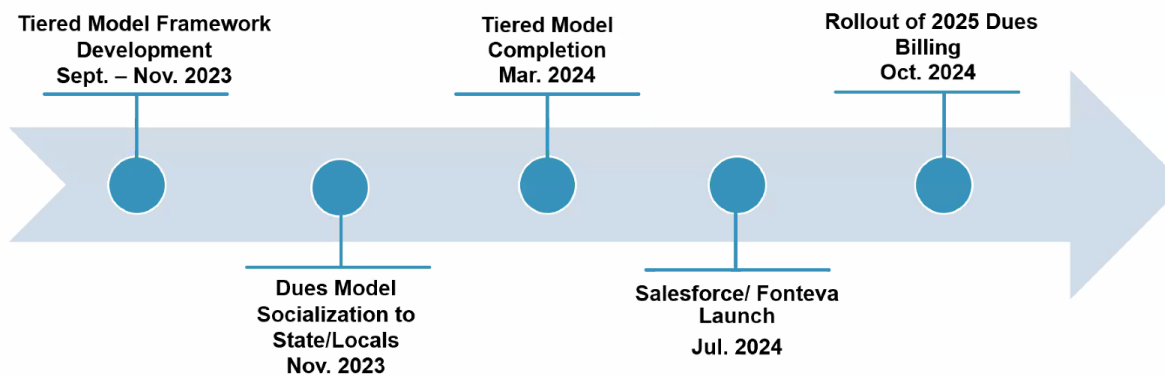
* These topics were also surveyed in 2022. Results were very similar, with minor decreases in 2023.

Tripartite Membership Model Task Force

- Bracken Killpack, Washington - Chair
- Dr. James Lee, Massachusetts
- Dr. Nipa Thakkar, Pennsylvania
- Dr. Lindsey Yates, Colorado
- Reva Brennan, New Jersey
- Drew Eason, Florida
- Kathleen Gerrity, Connecticut
- Greg Hill, New York
- Janna Johnson, Arizona
- Lee Ann Johnson, Texas
- Kevin Monteiro, Massachusetts
- Kainoa Trotter, Washington
- Vicki Wilbers, Missouri

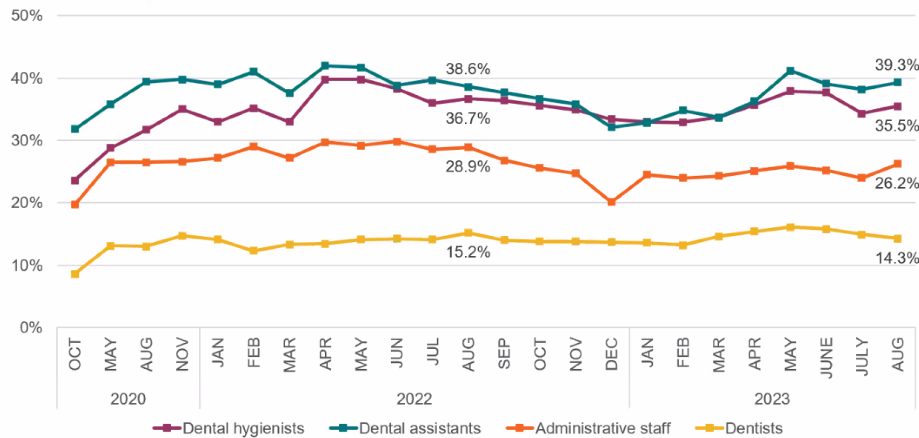
Core ADA Staff Team: Robert Quashie, April Kates-Ellison, Chris Chico, Sandy Eitel

Key Milestones



Dental Team Recruitment

Have you recently or are you currently recruiting any of the following positions in your dental practice? (Percentages indicating “yes.”)



More than one-third of dentists continue to report they are actively recruiting dental hygienists and assistants.

Key Takeaways

- **Business:** Practice schedules have been consistently at about 85% to 88% full on average over the last year. The most cited reasons for underfilled practice schedules are patient cancellations and no-shows. Average patient wait times went down for new patients in August 2023.
- **Recruitment Needs:** The number of dentists actively recruiting dental hygienists and dental assistants went up slightly in August 2023. Dentists continue to say recruitment is extremely challenging.
- **Confidence:** Dentists' confidence in their practice and in the dental care sector declined slightly in August 2023.
- **Practice expenses:** Changes in practice expenses from August 2022 to August 2023 varied by category. For personal protective equipment, about 20% of dentists in 2023 said this expense increased by at least 20% compared to 16% of dentists in 2022.
- **Insurance reimbursement:** In 2023, more dentists reported that their reimbursement from insurance companies either stayed the same or decreased compared to one year ago, when more dentists reported reimbursement went up by at least 1%.

ADA Promotion Plan



Paid

Social media



Earned

Media outreach to trade and consumer press

ADA press release

FDA press release



Owned

ADA News

Social media

ADA.org

State/local communications

Councils, Committees and Commissions

Morning Huddle

ADA emails (i.e. government affairs, science)

ADA App

Practice Update

Video (coming soon)

SmileCon (coming soon)



Shared

ADA Science & Research Institute

University of Pittsburgh School of Dental Medicine

The Center for Integrative Global Oral Health at the University of Pennsylvania School of Dental Medicine

Food and Drug Administration

Allied Health Organizations

Early Career Market Share

Class	Years since graduation									
	New Grad	1st	2nd	3rd	4th	5th	6th	7th	8th	9th
2014	91.8%	71.8%	61.7%	57.7%	58.0%	54.9%	51.3%	49.9%	48.7%	46.4%
2015	99.3%	92.5%	61.6%	58.7%	56.7%	51.3%	49.0%	47.0%	44.8%	
2016	99.8%	92.8%	67.7%	59.6%	53.8%	49.7%	47.4%	45.9%		
2017	98.2%	92.9%	65.0%	56.3%	49.9%	46.9%	44.3%			
2018	99.4%	97.0%	63.4%	54.2%	47.7%	43.3%				
2019	1.0%	98.8%	60.3%	49.3%	44.7%					
2020	99.8%	96.9%	60.0%	47.5%						
2021	99.6%	97.1%	58.4%							
2022	99.6%	97.6%								
2023	99.7%									

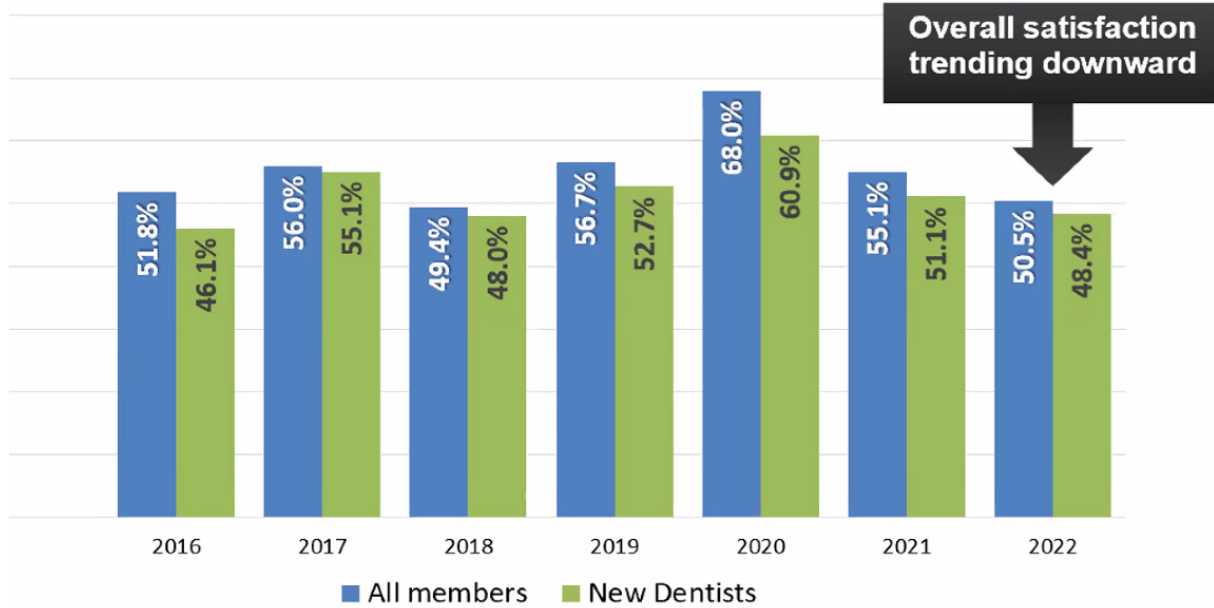
Key Market Share Drivers:

- ✓ Impact of dues streamlining
- ✓ Impact of workforce shortage and increased labor costs
- ✓ Impact of growth and consolidation of large group practices
- ✓ Ongoing demographic shifts
- ✓ Increased competition

Market share declines below 50% by the time they reach full dues

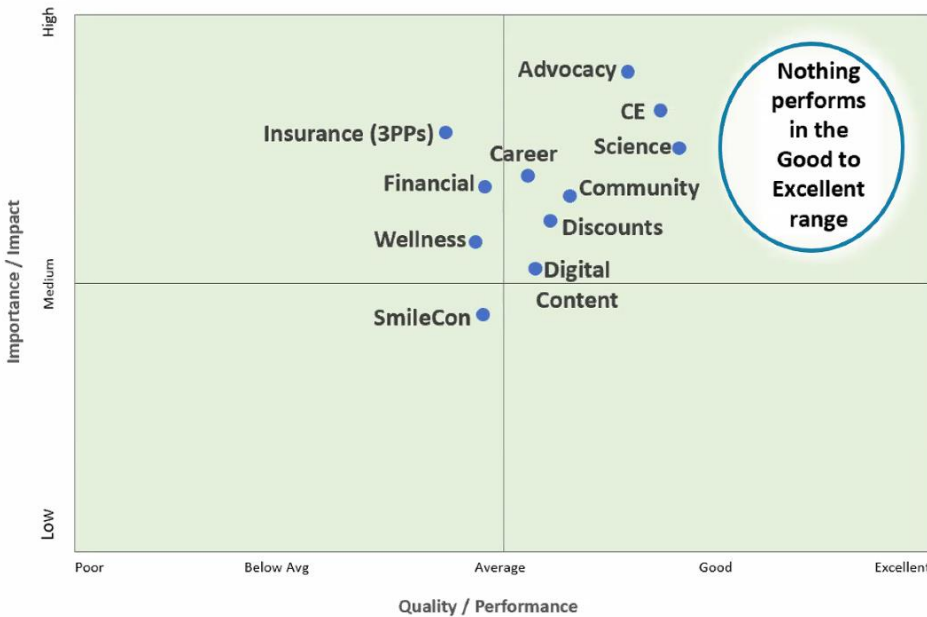
* Data in red is through August 2023

Annual Member Value Survey Overall Satisfaction*



* Satisfaction totals = combined top two scores for “extremely satisfied” and “very satisfied.”

2022 Services & Benefits – All Respondents



Advocacy – efforts to stand up for dentists and the public at national and state level

Career - career path support and mentorship (legal, personal, financial)

Community – a place where you feel welcome and can find and share your ideas/needs

Continuing Education - ongoing training to enhance, advance, expand skills

Digital Content – programming and resources on ADA.org, new ADA Member App, Dental Sound Bites Podcast

Discounts – offered through ADA Member Advantage with discounts on products and services for the office or home

Financial - debt relief/support, retirement planning, practice financing
Wellness - mental/physical wellness support

Insurance – support in dealing with 3rd party payers

Science and Research – JADA, clinical guidelines

SmileCon – ADA’s annual meeting

Wellness - mental/physical wellness support

Quantitative member survey currently in the field:

Drill deeper into 30 member benefit offerings, asking them to rank and assign a monetary value

- ➔ Assess what offerings are valued at each level of the tripartite and how they would prefer them delivered – at the national, state, local level, or if they don't care which
- ➔ Determine what benefits/services could be discontinued, and what could be added
- ➔ Determine what benefits/services are most critical to loyalty and retention

Dental Society Audit:

- ➔ Understand what growth and sustainability looks like at each level of tripartite (dues & non-dues revenue, market share, engagement, demographic targets, etc.)
- ➔ In the case of overlap, define criteria on who does it best (capacity, revenue, access, dentist preference)
- ➔ Plus, leverage the ADA's Loyalty research on the appeal of a loyalty program and revenue potential

Deliverables:

- ➔ **Share results and recommendations of all research components with the Membership Model Taskforce and state leadership within the next 4-6 weeks.**