

# State of Dental

2023

How Elite Practices  
Grow 20% Every Year





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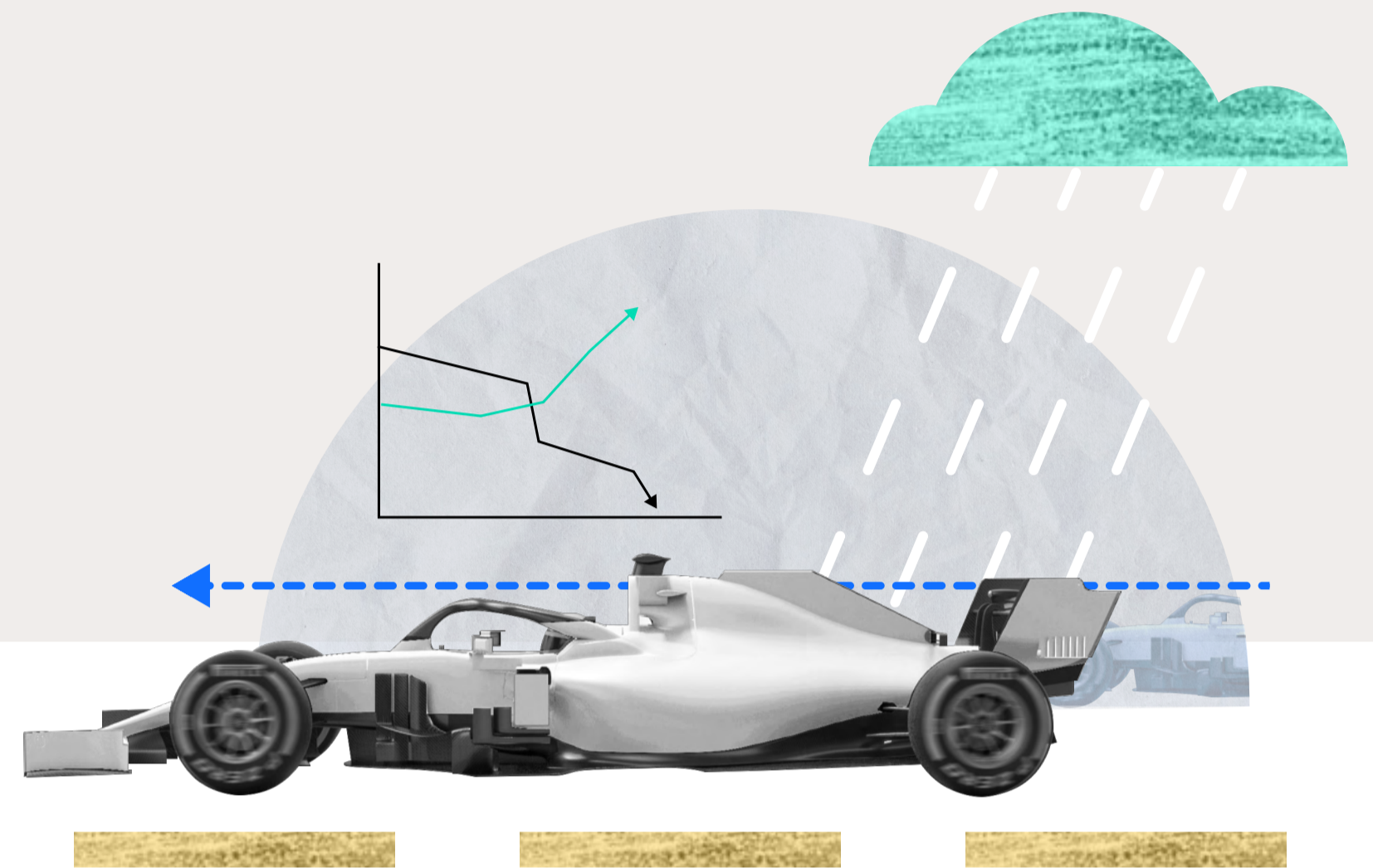
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*You cannot overtake 15 cars in sunny weather...but you can when it's raining."*



## Introduction: Passing cars in the rain

No one wants to operate a business in a difficult economy. It's hard. You need to increase effort to acquire new patients. You need to make smart technology investments. And critically, find quality staff to operate the office.

Yet, there is reason for optimism. Legendary Formula 1 driver Ayrton Senna famously said, "You cannot overtake 15 cars in sunny weather... but you can when it's raining." Just as Senna would use challenging weather conditions to move ahead in a race, dentists can work around macroeconomic challenges to see more patients and grow revenue.

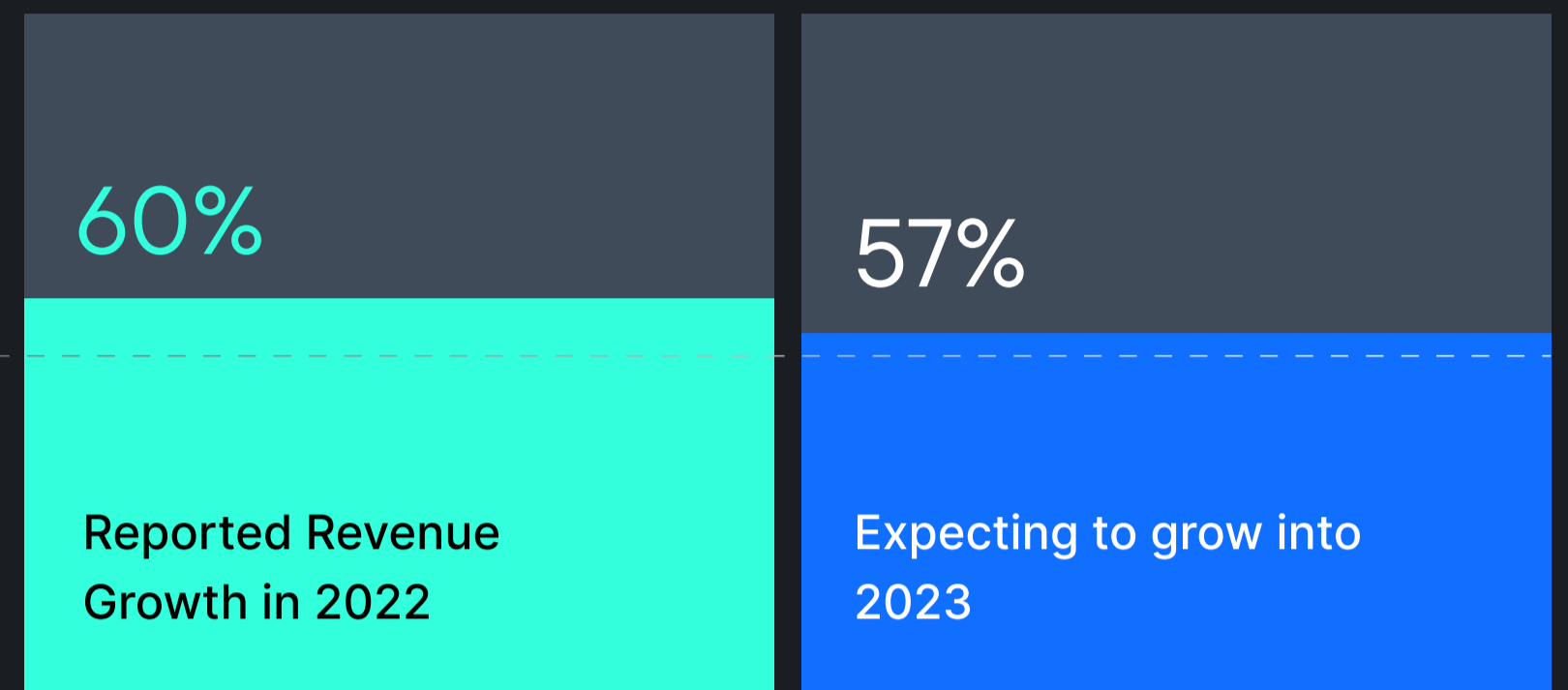
In this report, we will explore the State of Dental in 2023, and the actions elite practices are taking to grow 20% every year.

# Summary

## Industry Outlook

### DENTISTRY IS OPTIMISTIC FOR 2023

Nearly **60%** of practices reported revenue growth in 2022, and **57%** are expecting to continue to grow into 2023.



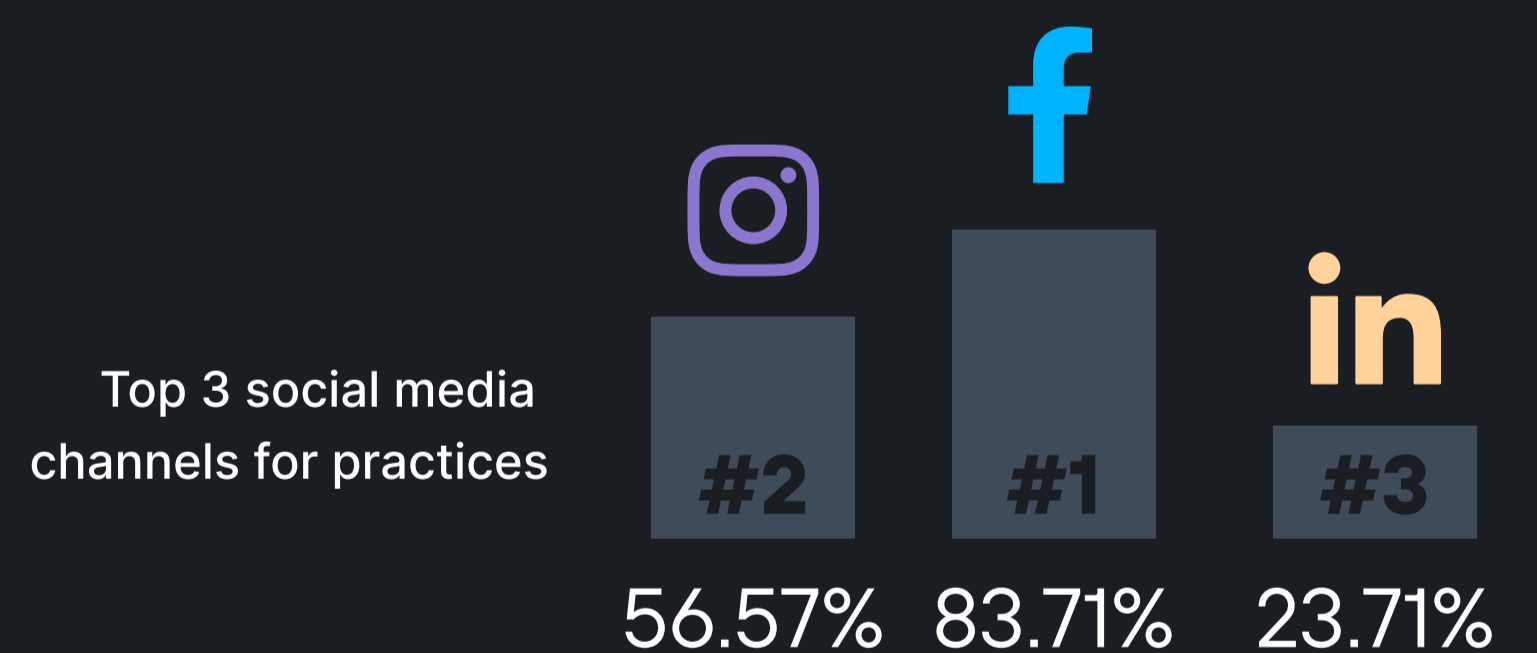
### STAFFING IS THE #1 CHALLENGE

The #1 concern for practices in 2023 is keeping the office staffed. **97%** of offices are placing a greater emphasis on retention and the happiness of their current employees.



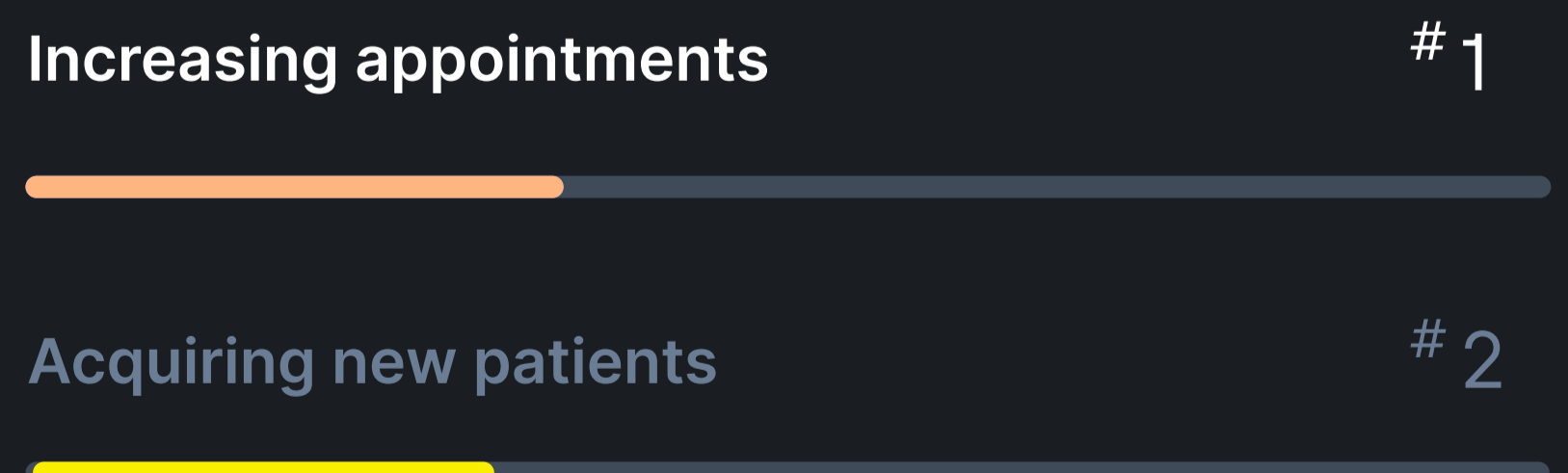
### USING SOCIAL MEDIA HELPS ENGAGE PATIENTS

Over **80%** of respondents reported they are using social media to promote their practices. **41%** of all booking services are found through social media.



### INCREASING APPOINTMENTS RANKS HIGHER THAN ACQUIRING NEW PATIENTS

Increasing appointments is the #1 goal for practices looking to grow. While new patients can help to boost your overall list, reaching out to your existing patients is a powerful tool for maximizing the schedule.









State of Dental 2023

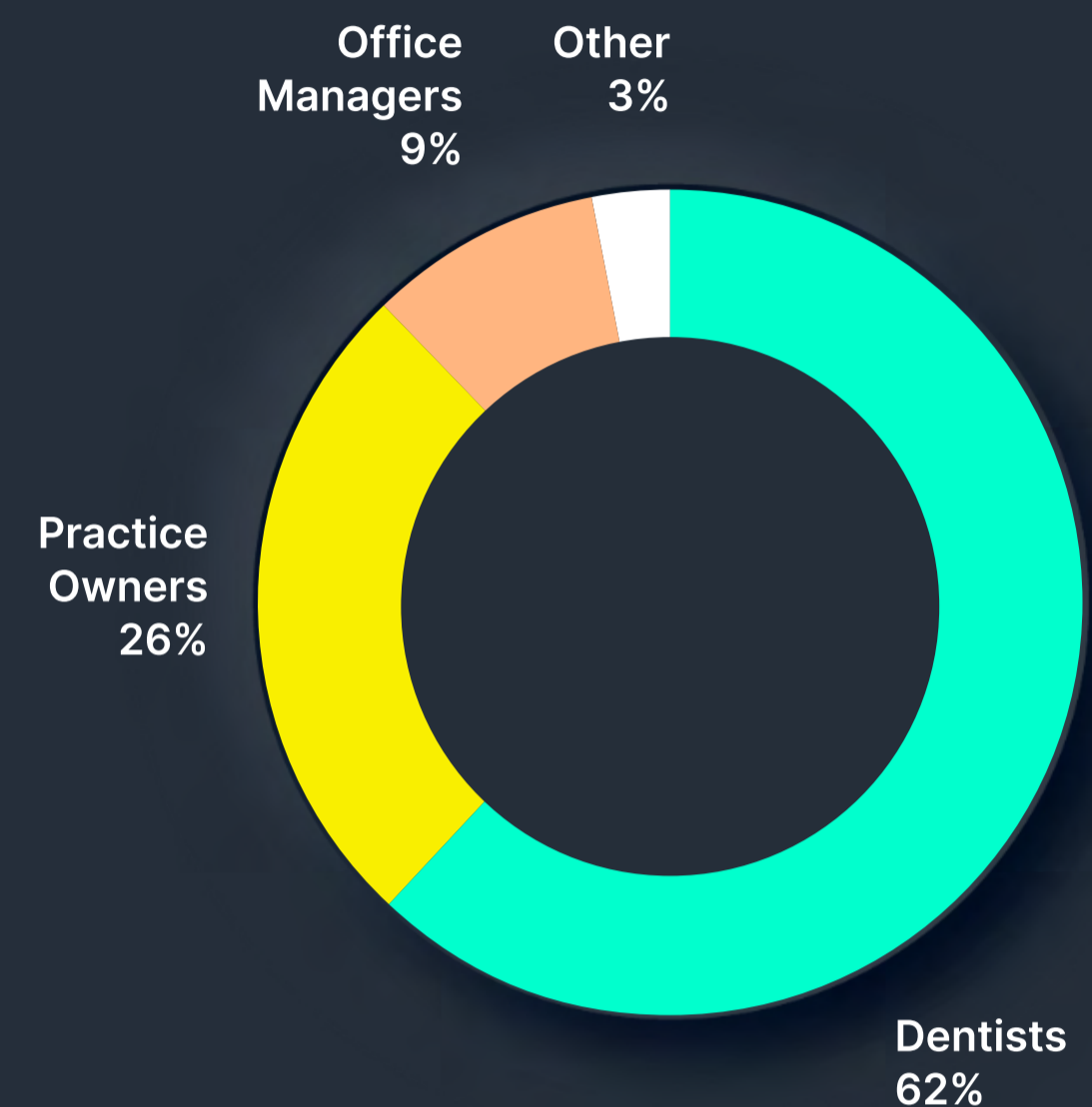
# Survey Demographics



# How we conducted the survey

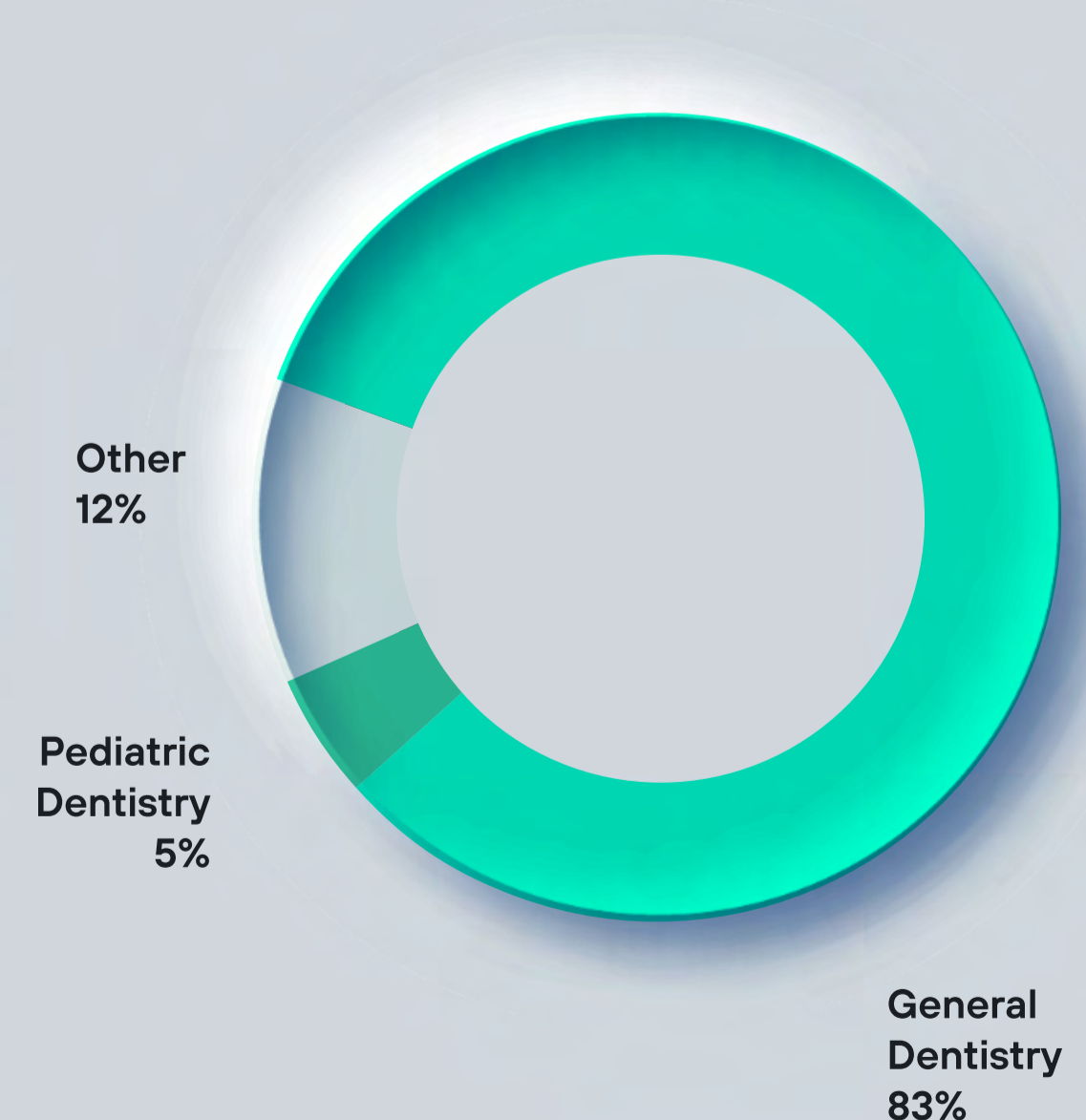
We surveyed over 500 dentistry professionals throughout November 2022. The survey was completed by **dentists** (62%), **practice owners** (26%), **office managers** (9%), and **other select roles**, including hygienists, assistants, marketing, billers, operations, and Chief Executives.

## Survey Participants



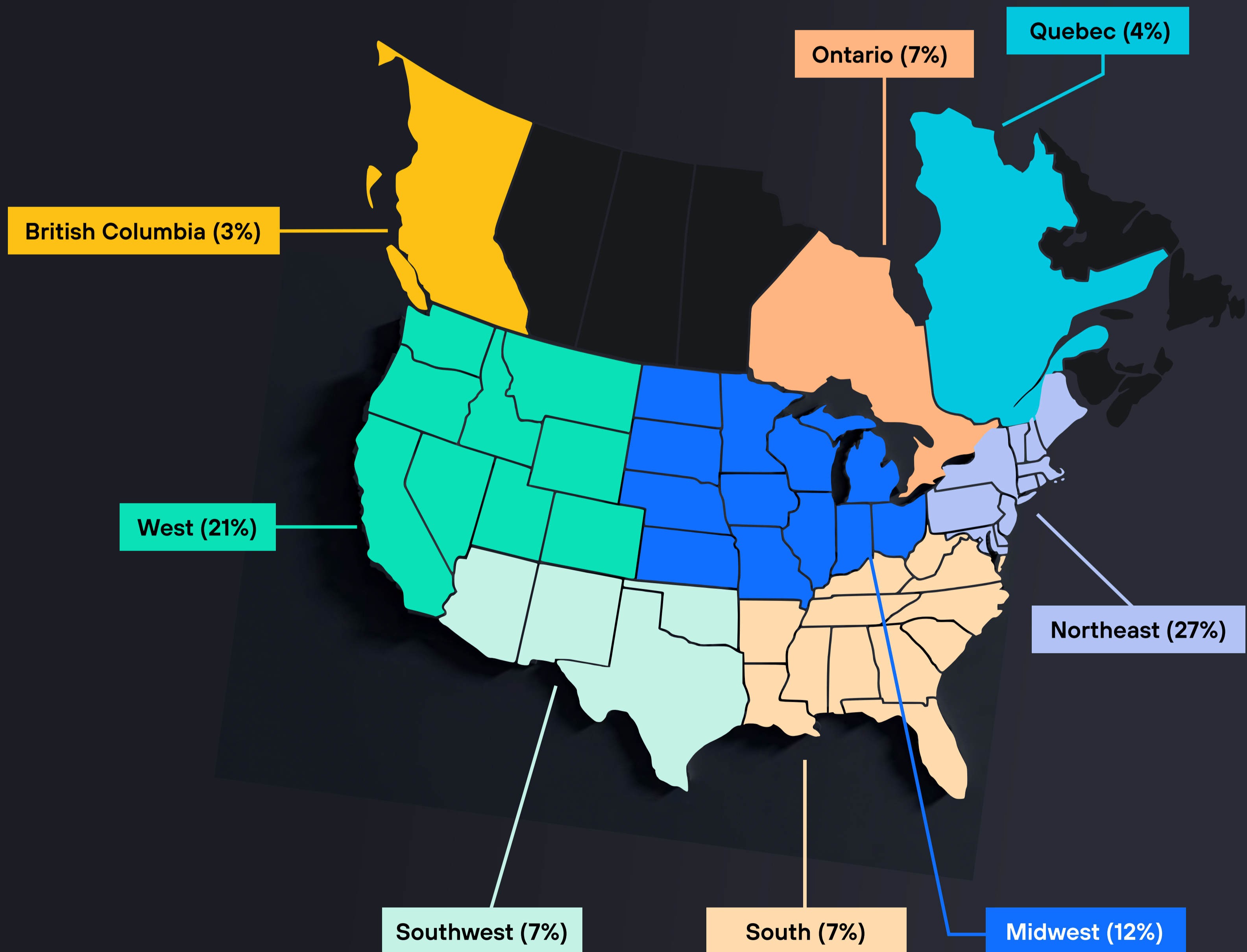
Over **83%** of respondents reported they were in general dentistry, with **5%** in pediatric dentistry, and representatives from orthodontics, periodontics, cosmetic dentistry, and endodontics.

## Respondent Practice Field



# How we conducted the survey

Respondents were located across the US and Canada, including representation from all 50 states and 3 provinces.







State of Dental 2023

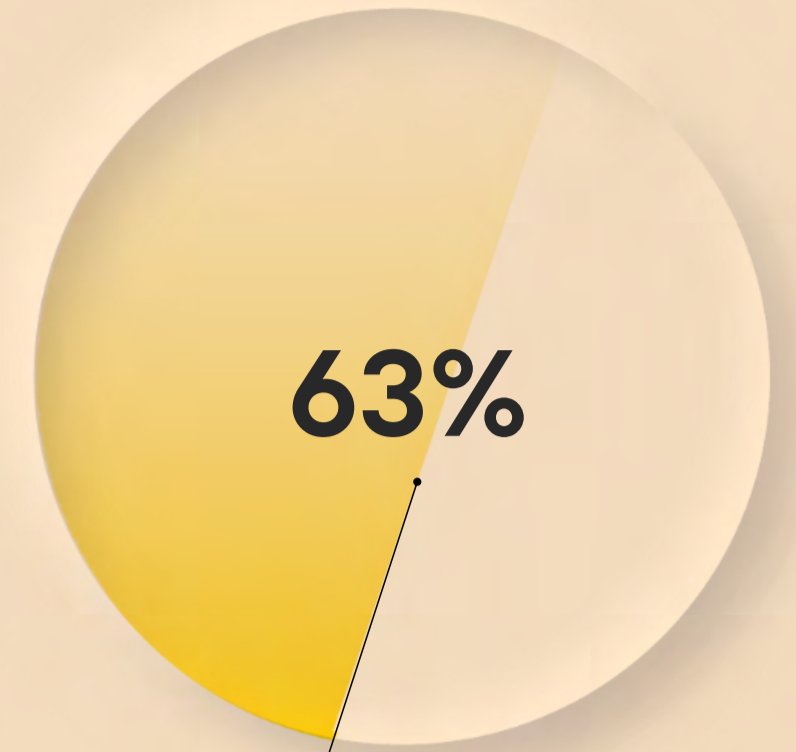
# State of Dental Today

# Dentists' confidence outperforms the economy

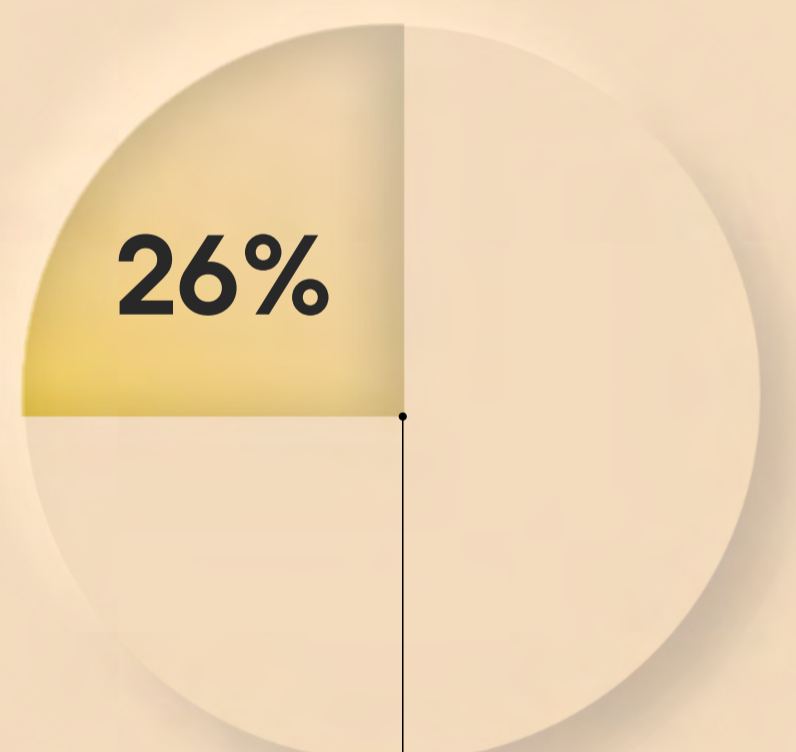
We start the State of Dental 2023 by examining how successful practices performed the previous year.

2022 ended with lots of economic uncertainty. Interest rates are up, the stock market is down, and large and small businesses are preparing for a recession. A positive note, the healthcare industry is generally less affected by market fluctuations compared to other industries.

A monthly survey conducted by the American Dental Association (ADA) asks dentists to rate the economic outlook of their practices. In November 2022, **63%** of dentists reported feeling confident in their practice's outlook, compared to only **26%** who had confidence in the overall economy.



- of Dentists are Confident in the Success of their Practice



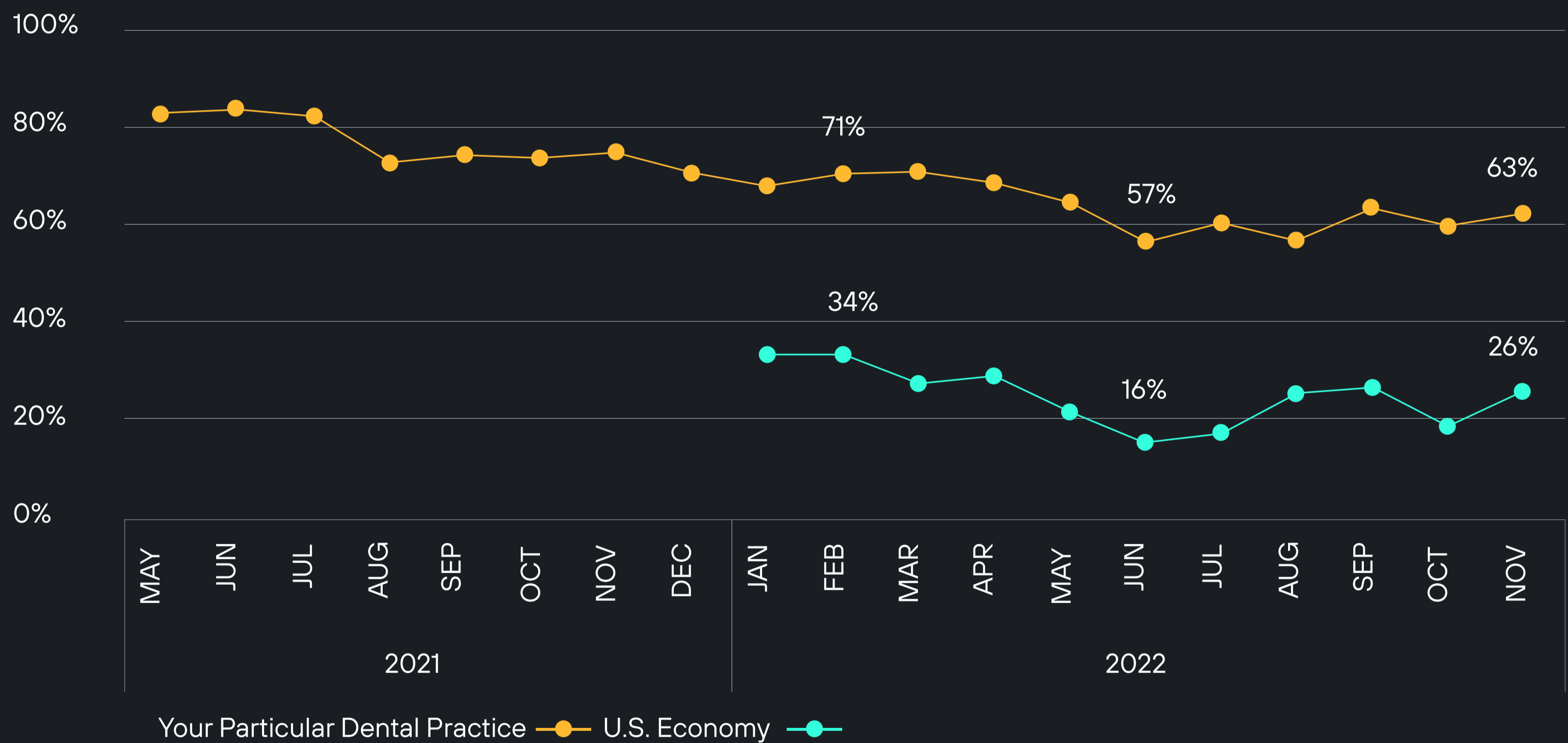
- of Dentists are Confident in the Success of the Economy



# Economic Outlook

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

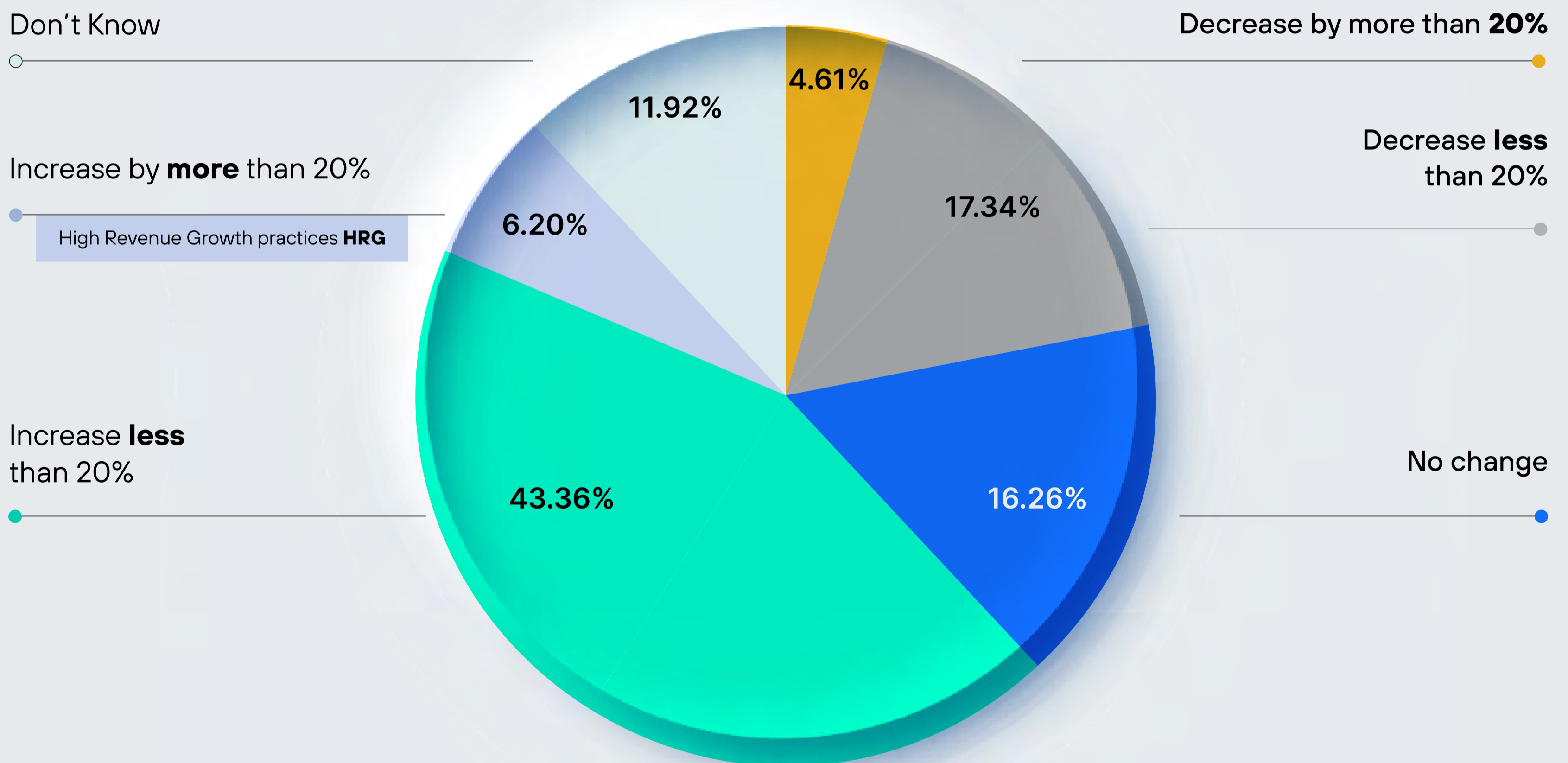
(Percentages indicating "very" or "somewhat" confident.)



# How Practices Performed in 2022

To set a baseline, We asked practices about their revenue in 2022.

**59%** of respondents reported overall revenue growth in 2022, with **6%** of the total practices surveyed forming an elite group that grew more than **20%** in revenue. We'll refer to High Revenue Growth practices (HRG) as Elite practices that grow revenue by **20%**.



# How Practices Performed in 2022

## A Closer Look

### HIGH REVENUE GROWTH (HRG) IN 2022

Practices where revenue has increased by more than 20%

6.2%

### HIGH REVENUE DECLINE (HRD) IN 2022

Practices where revenue has decreased by more than 20%

4.51%

### AVERAGE REVENUE DECLINE (ARD) IN 2022

Practices where revenue has decreased by less than 20%

20.51%

### AVERAGE REVENUE GROWTH (ARG) IN 2022

Practices where revenue has increased less than 20%

52.29%



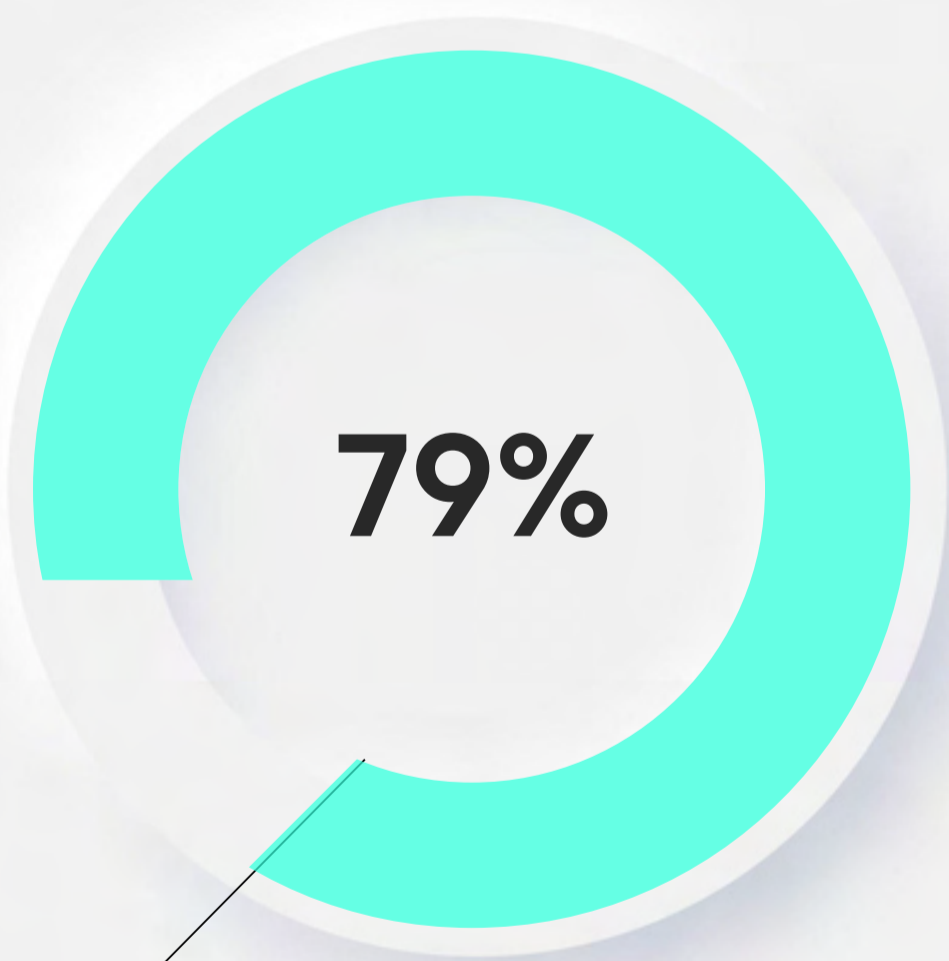
## What Elite Practices Do Differently

High revenue growth practices **hate cancellations.** They deploy a mix of tactics to do everything they can to reduce cancellations. **79%** of HRG practices aka Elite practices, report fewer than **10** cancellations per week.

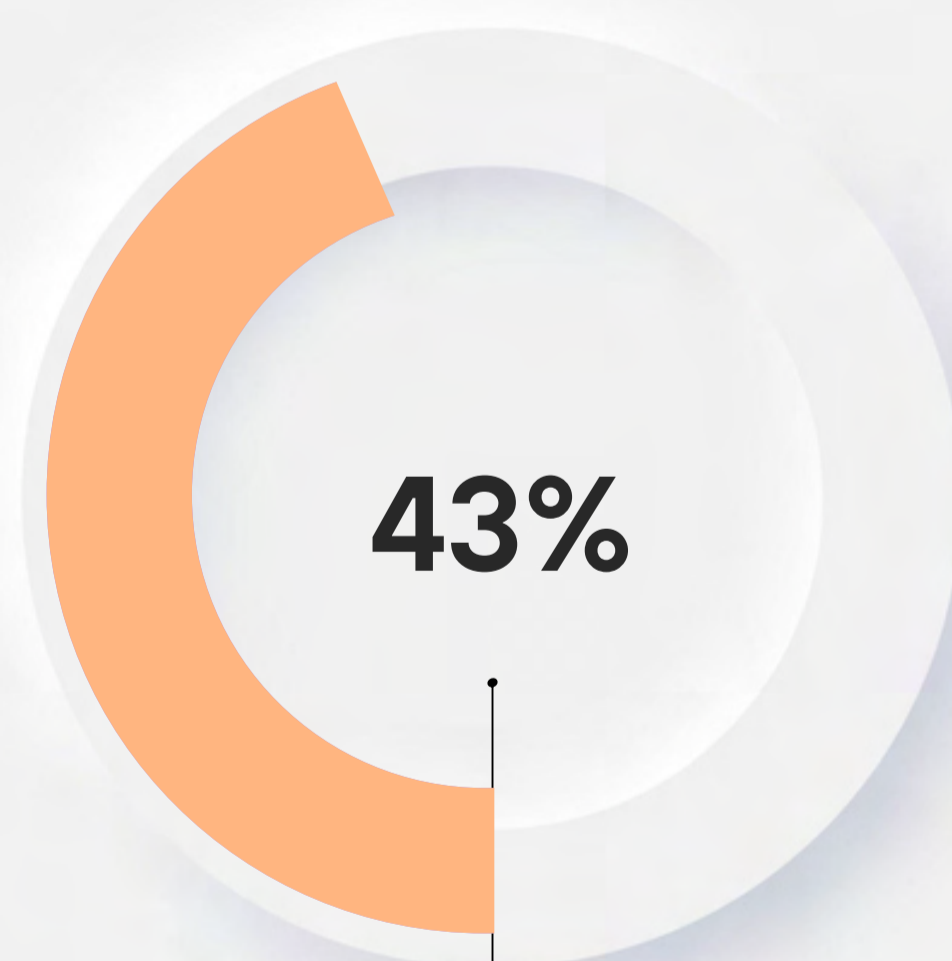
If they do get a cancellation, they have a plan in place to fill that operatory chair so they don't waste a provider time slot.

When looking at negative revenue growth practices in contrast, only **43%** said they have fewer than **10** cancellations per week.

### Fewer than 10 Cancellations Per Week



- High Revenue Growth Practices



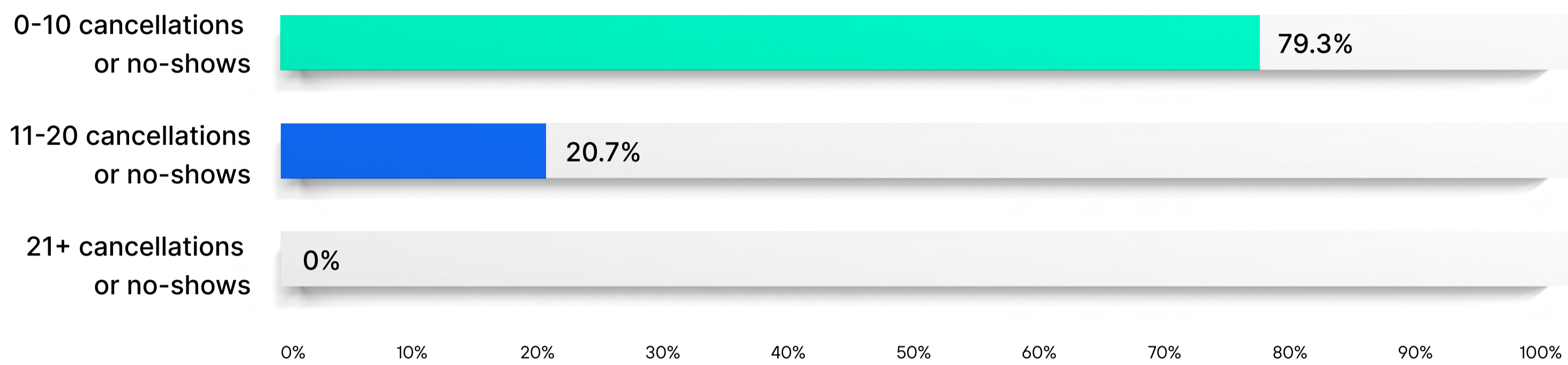
- Negative Revenue Growth Practices



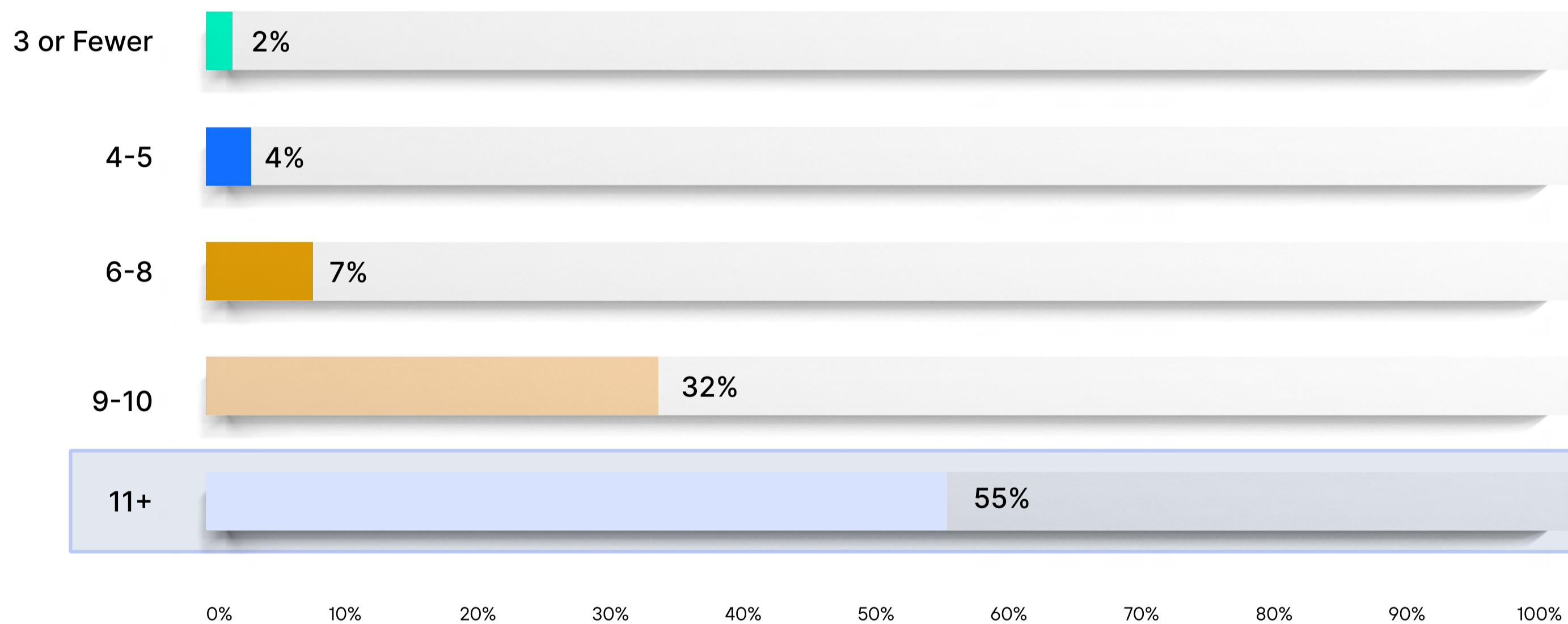
# What Elite Practices Do Differently

Lower cancellation rates directly correlate with more appointments served, higher patient engagement, and a stronger bottom line.

On average, how many cancellations or no-shows do you see a week at your location?



On average, how many appointments does each provider at your location see per day?





## State of Dental Today

Unsurprisingly, Elite practices also **optimize for the number of patients each provider** sees per day.

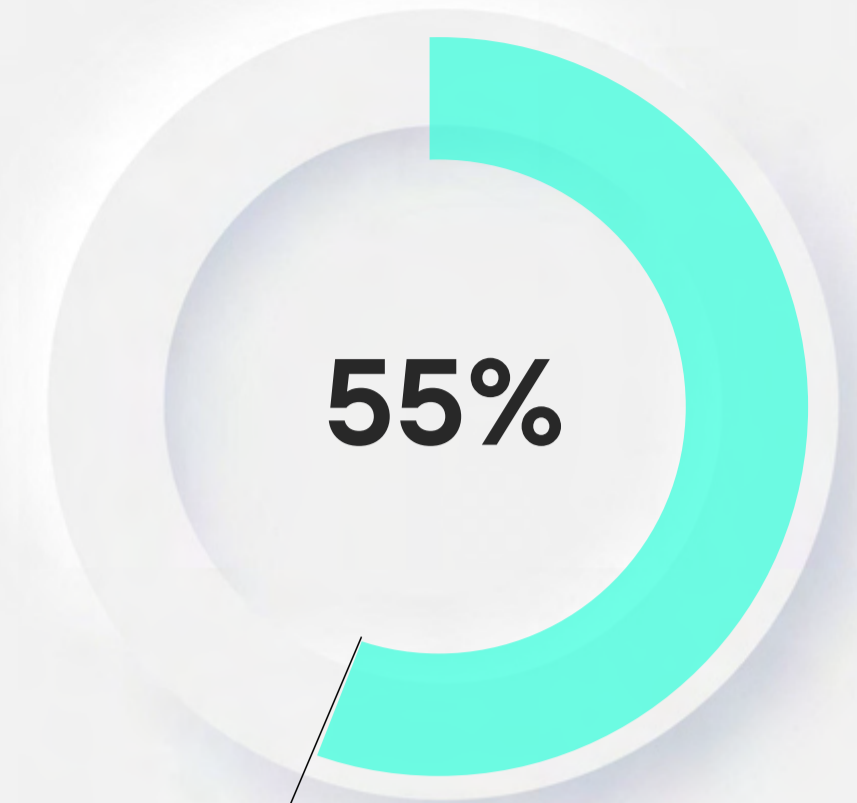
**55%** of Elite practices have providers seeing 11 or more patients a day. To ensure they are not sacrificing care for volume, these practices have optimized their schedule so providers are spending more time in front of patients, doing much less administrative work.

Negative growth rate practices see fewer patients. Only **32%** of practices experiencing negative growth are seeing 11+ patients a day.

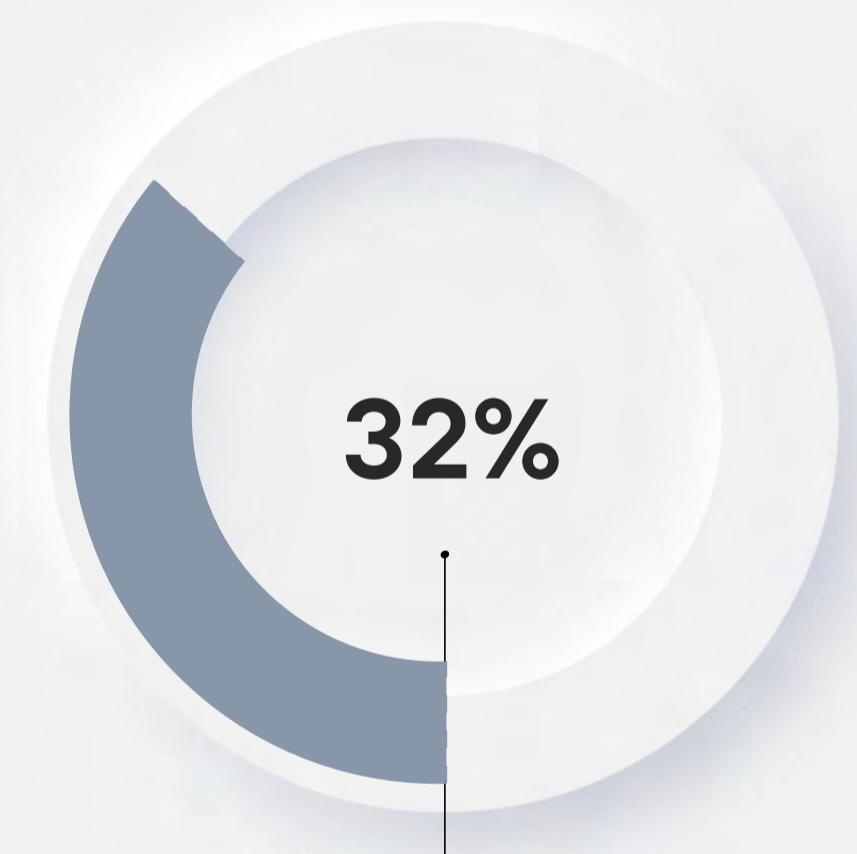
One of the biggest contrasts we see in Elite practice strategies is the use of technology. Almost all Elite practices deploy patient experience platforms like NexHealth, Weave or SolutionReach.

**92% of Elite practices actively use patient communication technology.** Common applications of the technology are to digitize the booking process, patient messaging, collection of medical information via forms, reminders, recalls, reviews and payments.

And when you drill down further and look at the practices experiencing high revenue decline (greater than **20%** decline in 2022), only 50 percent are using patient communication software.



- **Elite Providers seeing 11 or more patients daily**



- **Providers from revenue decline practices seeing 11 or more patients daily**





State of Dental 2023

# Predictions for the State of Dental in 2023



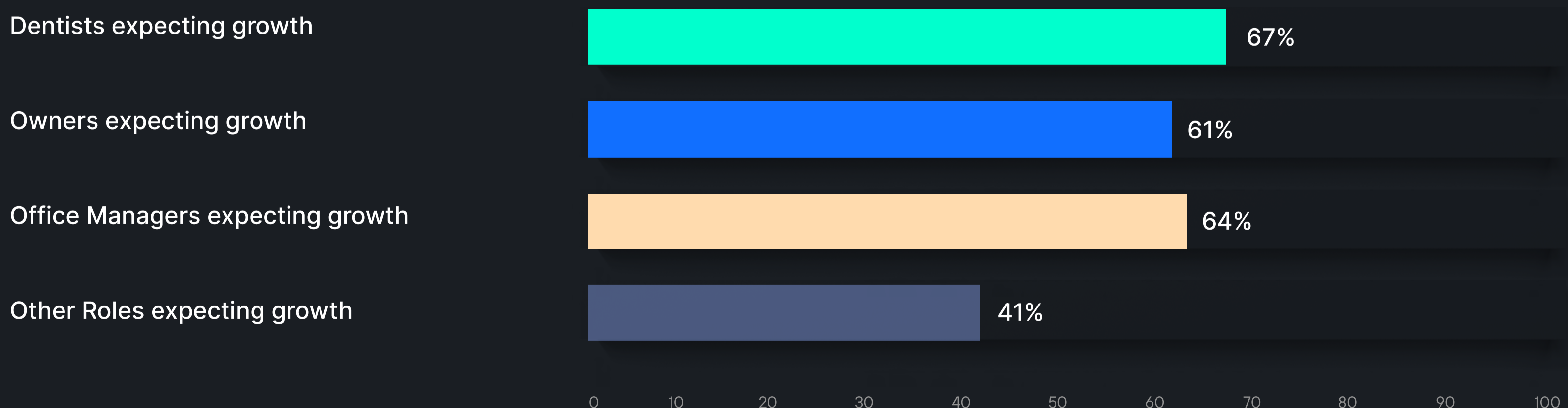


# Growth will not slow down in 2023

When looking at the aggregate of all dental practices, **57%** of dental offices expect revenue growth in 2023. This is down only slightly from the **59%** of practices that saw growth in 2022; still a vote of confidence amidst a challenging economy.

Comparing the various roles, dentists are the most optimistic, with **67%** of dentists expecting to see revenue growth in 2023. **64%** of office managers expect to grow followed by **61%** of owners. Less clinically involved roles, including IT and patient advocates were the least likely to report optimism—with **41%** marking that they didn't know what to expect for 2023.

## When looking at optimism by role:





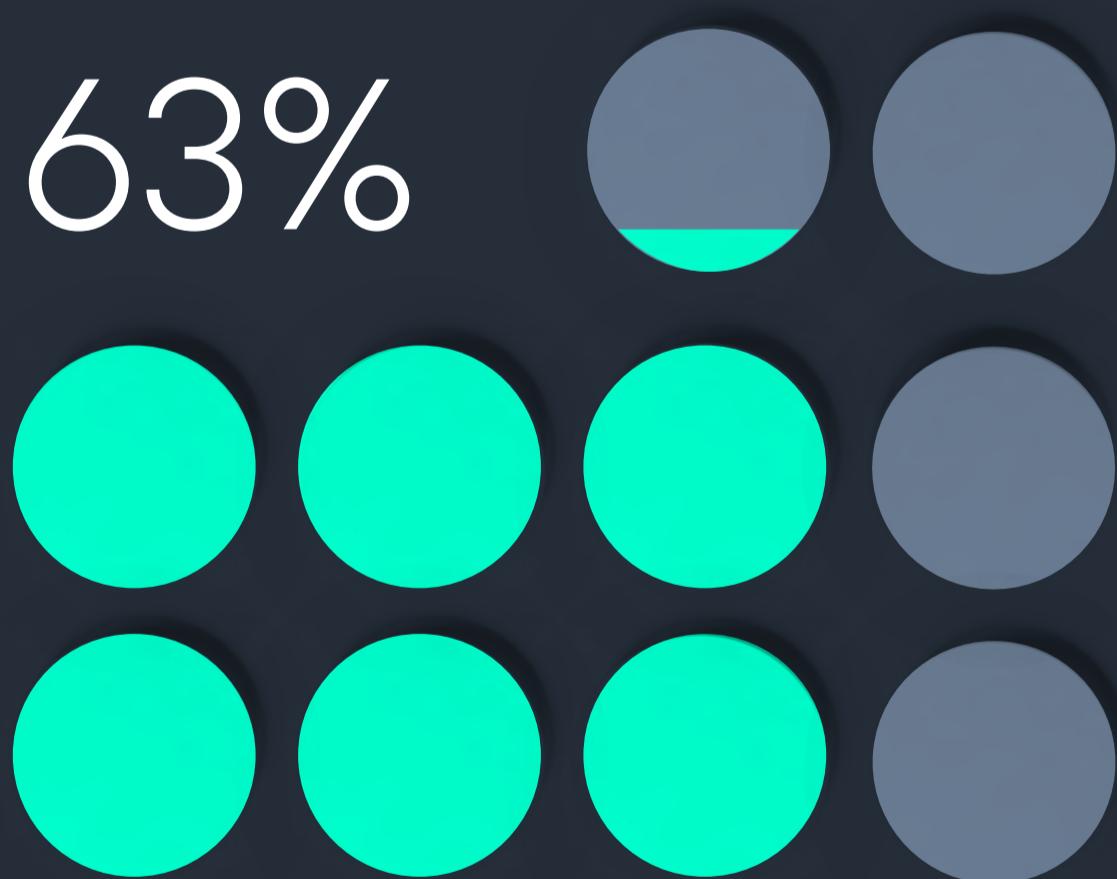
## Even high revenue decline practices will turn it around

It's no surprise that Elite practices are expecting a promising year ahead, passing even more cars in the rain. **63%** of Elite practices from 2022 expect to grow another **20%+** in 2023. Maintaining a year-over-year growth rate of more than 20% is exceptional.

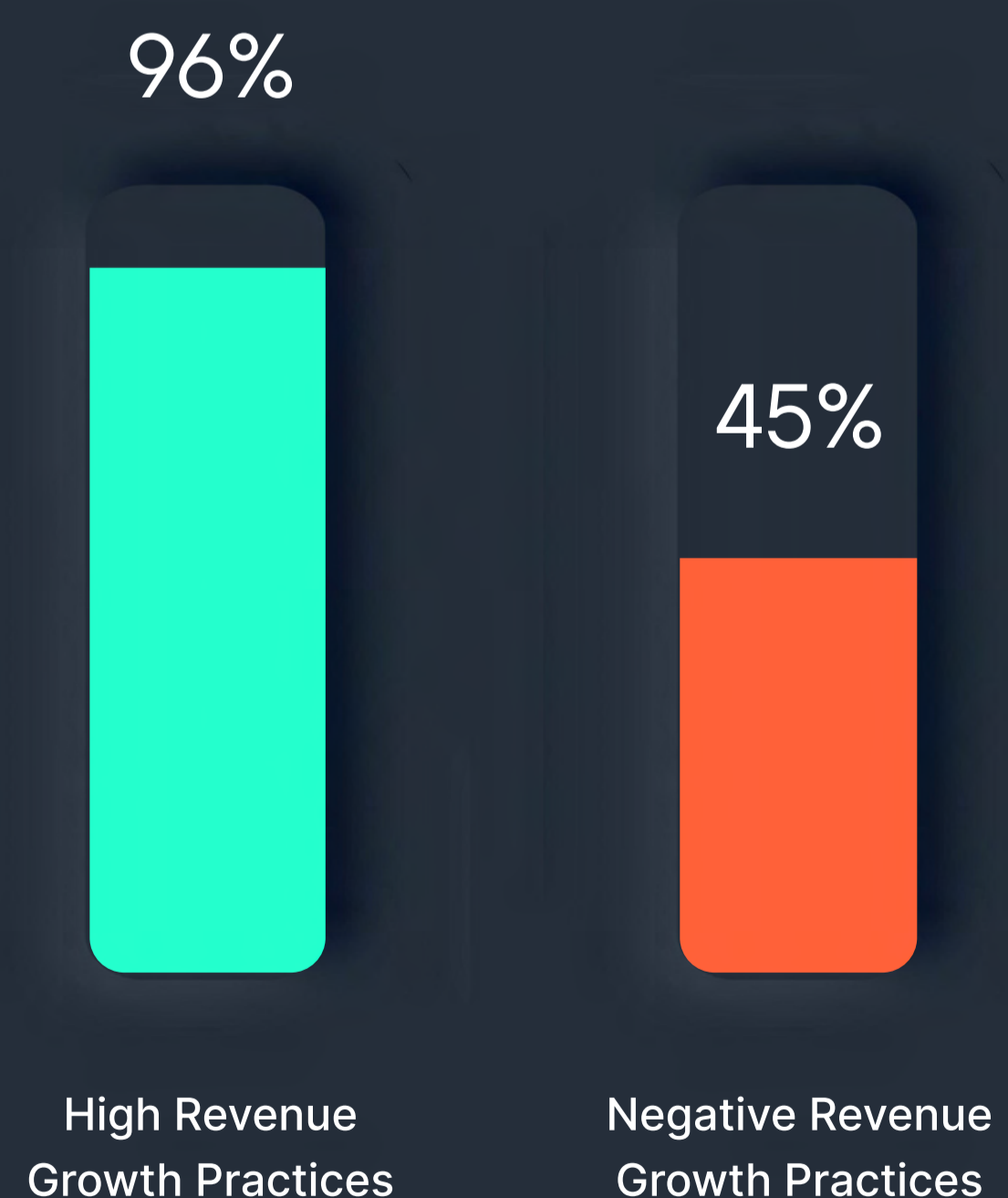
In total, **96%** of Elite Practices expect growth in 2023.

At the same time, almost half of declining revenue practices from 2022, expect to turn it around in 2023. **45%** of practices that had declining revenue in 2022, are expecting revenue growth in 2023.

### Elite Practices expecting to grow another 20%+ in 2023



### Practices expecting revenue growth in 2023

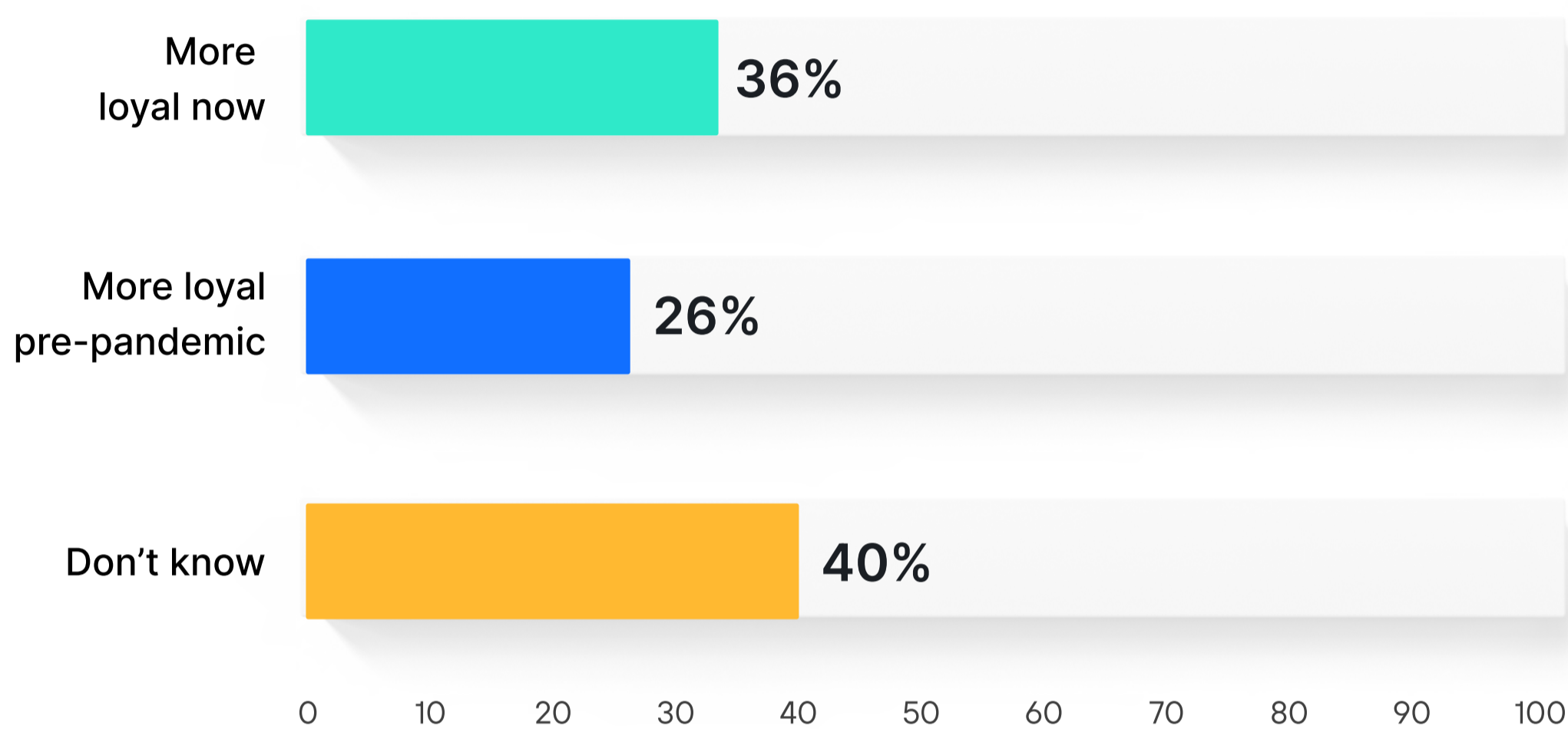




## Patient loyalty will continue to rise

**36%** of practices report their patients are more loyal now than they were pre-pandemic, while just **26%** say patients are less loyal now.

Are patients more loyal to a practice now, or pre-pandemic?



A surprising finding was that almost 40% of practices did not know if patients were more loyal today than they were pre-pandemic – identifying patient recall as a metric most practices are not actively tracking.

Practices that do track this metric look at data such as the return percentage of patients, with the top practices seeing at least 80% of patients return for multiple appointments each year.

The Smilist, for example, runs multiple ongoing recall campaigns, all fully automated. They can return patients for 6-month cleanings and target patients at the 9-month or 1-year mark if they've seen a long absence.

85% of The Smilist's patients who visit for an appointment become recurring patients.



*We use reminder texts and emails set up for pre-appointments, and then patients get digital payment links and are automatically rebooked 6 months out. Our office managers love the experience as much as the patients do.*



**Melanie Basile**

Chief Growth Officer

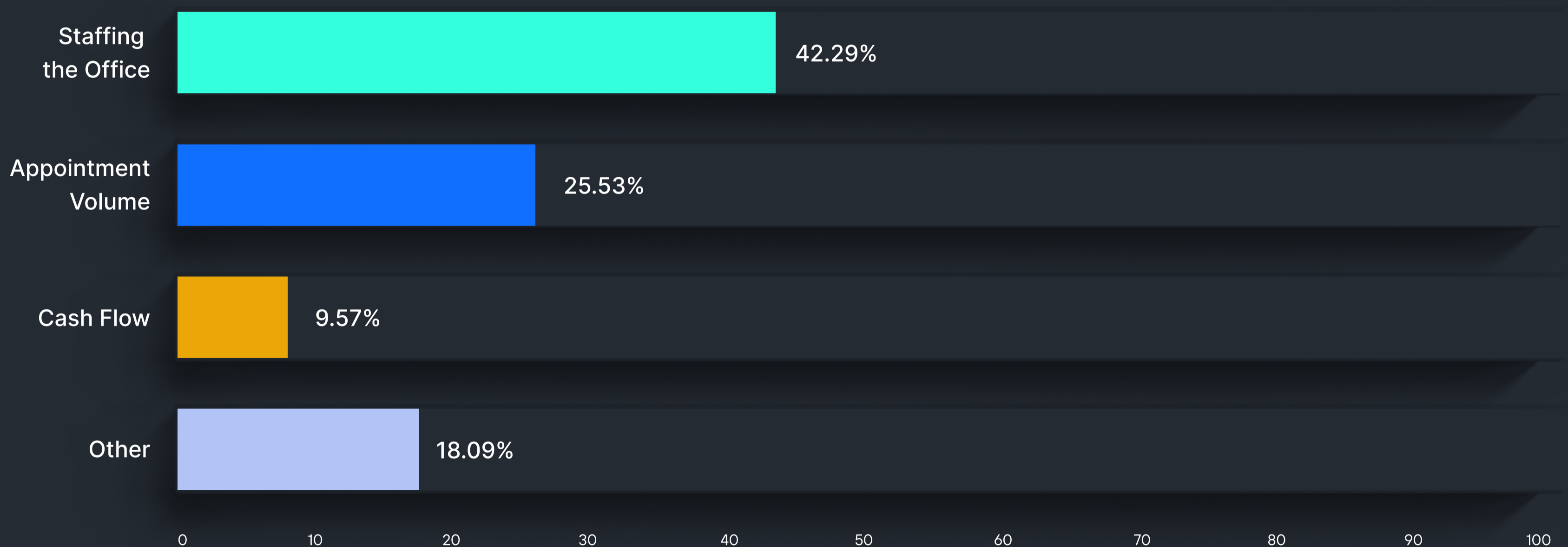
The Smilist

## The biggest 2023 challenge will be staffing

We asked survey participants “What is your practice’s biggest concern for 2023?”  
The top concern for all practices, at all revenue and patient volumes, is staffing the office.

While staffing is the top concern, appointment volume was close behind. Of course, a robust appointment book generates revenue growth. But keeping appointment volume high also keeps the staff engaged in interesting cases and allows your practice to offer more skilled care.

What is your practice's biggest concern for 2023?



Especially in wake of COVID, demand for dental care has been unpredictable and can fluctuate, making it difficult for practices to maintain a stable and adequately-sized staff.

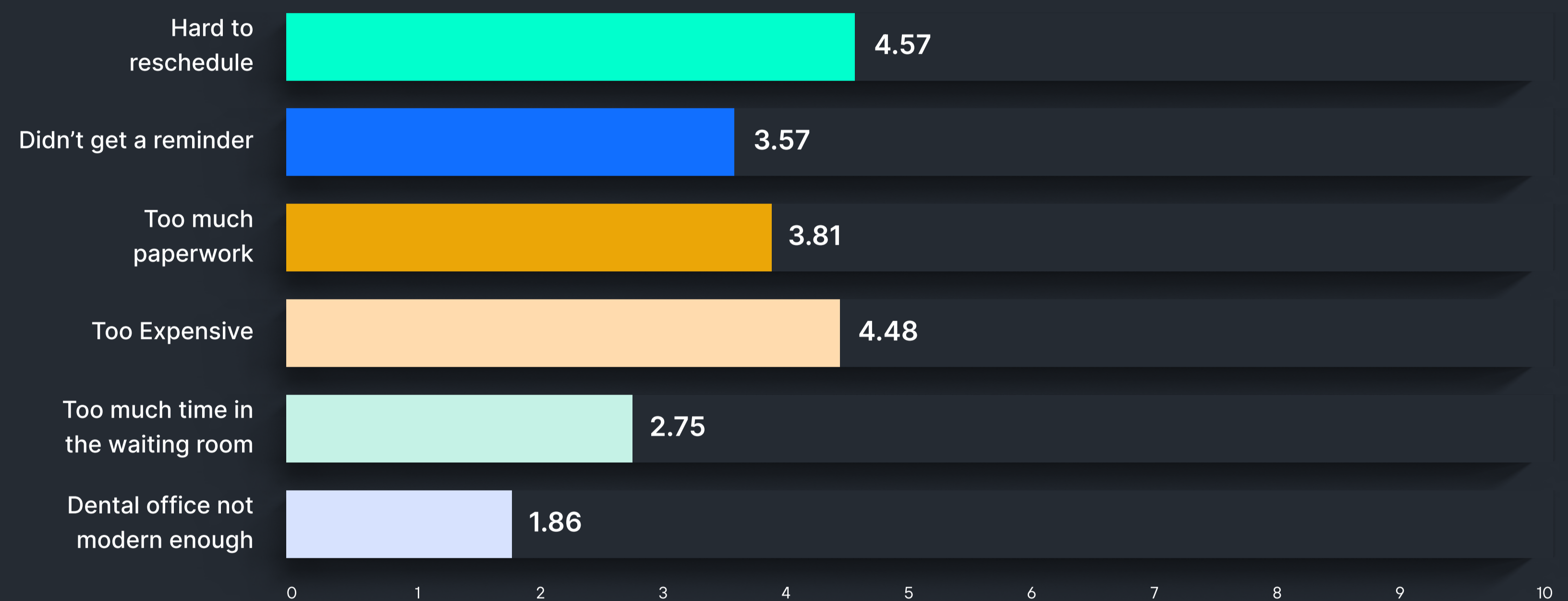
With **57%** of dental practices expecting to grow next year, the competition for staffing the office will only become more fierce.

✔ **KEY TAKEAWAY** ► *42.29% of Practices rank ‘**Staffing the Office**’ as their biggest concern for 2023*

## The #1 patient complaint in 2023:

We asked practices what the most common complaints from patients, and the #1 complaint was “Hard to Reschedule,” beating out “care being too expensive.”

Rank the most common complaints you hear from patients.



The fact that rescheduling was a more common complaint than cost shows that patients want the same flexibility in dental they enjoy with the rest of their lives. Easy booking options, self-serve rescheduling, and flexibility.

Practices that give patients access to easy ways to reschedule will stand out. Popular options include automated recalls, online booking on the website, and—most conveniently—[1-Click Booking](#).

The next two most common complaints from patients are “too much paperwork,” and “missing reminders” for appointments.

Elite practices have largely solved for those complaints, with 92% of Elite practices using patient experience software to digitize all the paperwork and reminder sequencing.



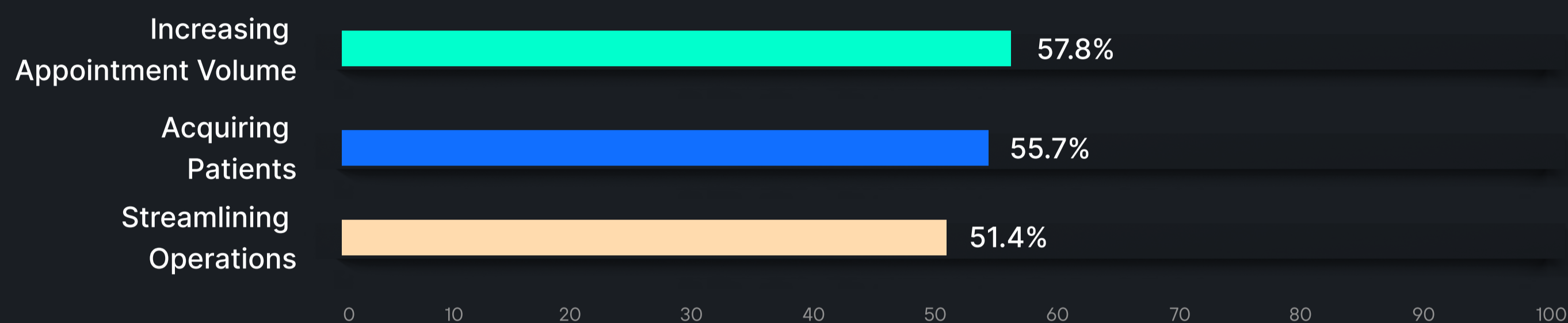


State of Dental 2023

# How to Grow Your Practice for 2023

# How to grow your practice for 2023

NexHealth asked practices their objectives for 2023.



We asked practices to rank their top goals for 2023, and the top 3 answers were:

- 1 INCREASING THE NUMBER OF APPOINTMENTS
- 2 ACQUIRING NEW PATIENTS
- 3 STREAMLINING OPERATIONS

While acquiring new patients is always important to a practice's bottom line, increasing the number of appointments ranked higher—[rising from the #4 objective](#) in 2022. To grow in 2023, you will need to not only attract patients to the office, but also to retain and engage them for the long term.

This is a smart move for the business. Though new patients can boost the calendar, [it costs an average of \\$300](#) to acquire a new patient. By contrast, engaging patients you already have drives production without markedly increasing your costs.

When NexHealth asked practices the similar question at the start of 2022, practices rated the patient experience #1, while the importance of increasing appointments only ranked #4.

But as recession threatens all businesses, volume and protecting revenue has become essential. Engaging with patients is the most effective way to not only ensure revenue doesn't decline, but to endure loyalty and reduce the need to acquire new patients.

## Improve staff retention to support high appointment volume

Earlier in the report, we documented the #1 challenge for practices is retaining their team, which becomes even more important as you raise your appointment volume.

The tried and true top method to retain staff is peer recognition. More than **75%** of practices recognize and praise staff in order to motivate them to stay. **62%** of practices will be making compensation adjustments to retain staff. **50%** of practices are investing in training for staff.

Not surprisingly, career mobility is limited for staff at dental practices. Only **24%** of practices plan to use promotions or title changes as a way to retain staff.

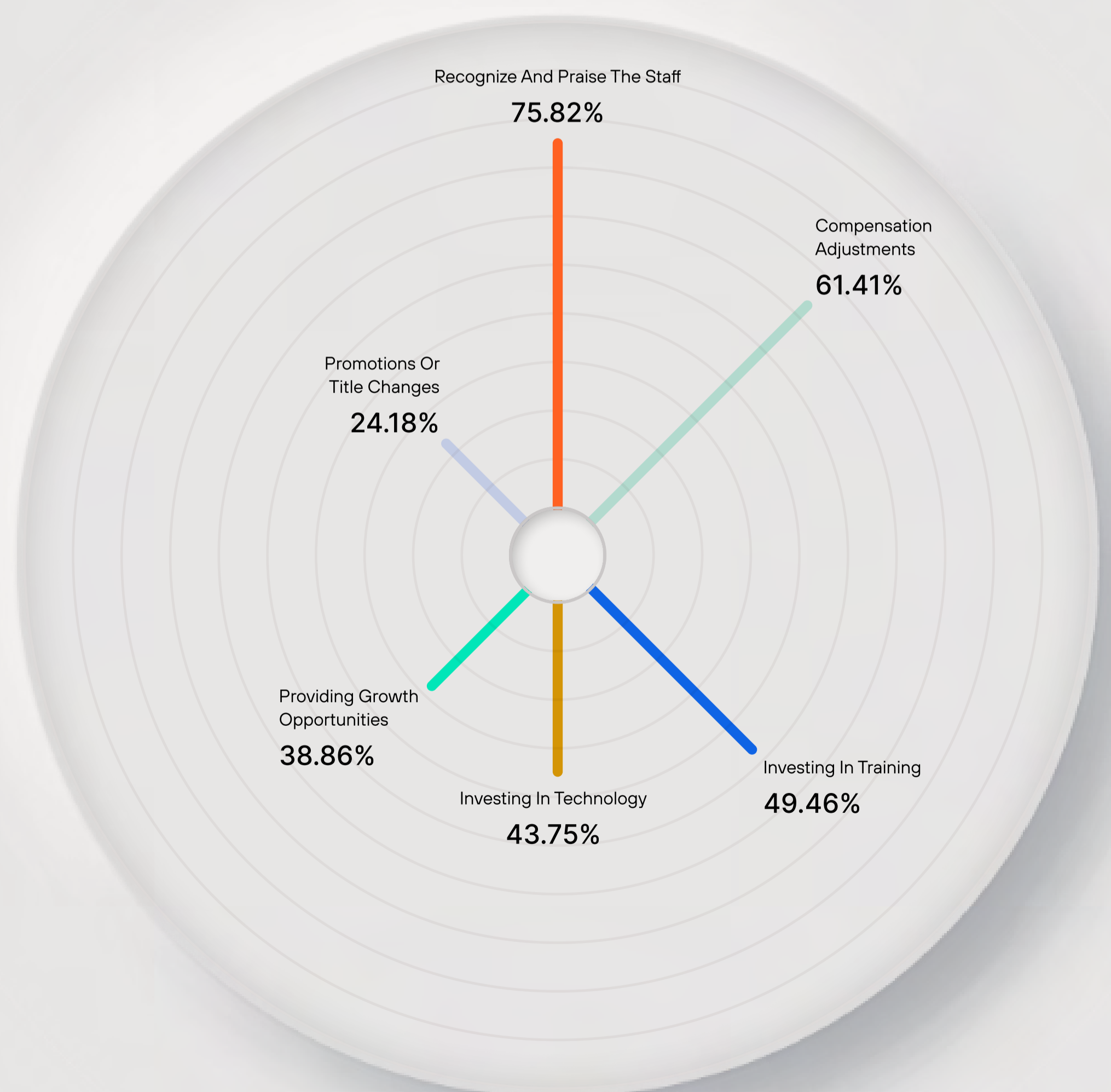
## What services do you offer to retain staff?



*It's never been more difficult to hire staff than it is right now.*



**Casey Cid**  
Managing Director  
616 Dental Studio

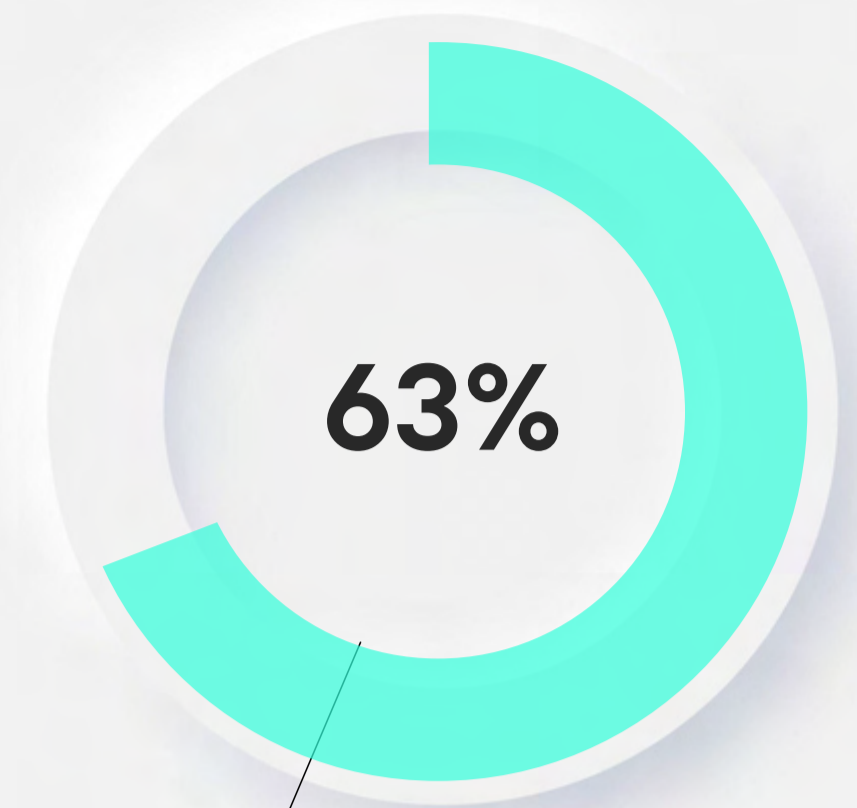




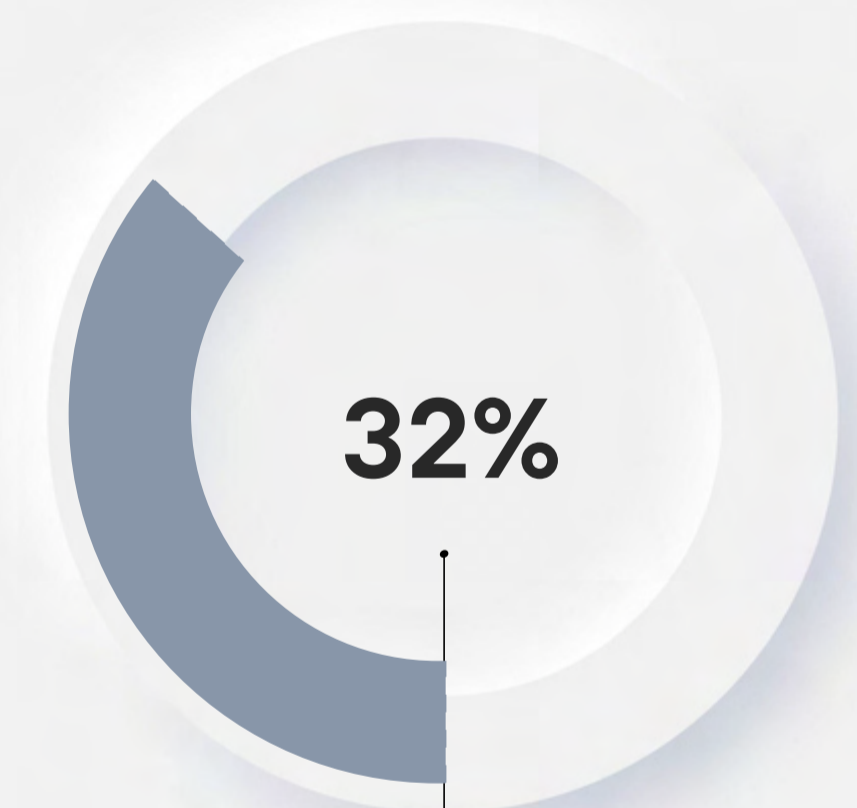
## Use digital technology to invest in your team

One important opportunity for practices is to invest in technology that makes staff's workload easier to manage, so they want to stay. Yet only **43%** of practices—and **58%** of HRG practices—plan to use technology to reduce the workload. But tedious and repetitive tasks, like patient reminders or entering intake information, take hours out of the day. Tools to automate these tasks are readily available and even customizable for your workflows.

While **63%** of respondents said allowing patients to complete their intake paperwork online increases patient satisfaction, only **32%** of practices offer digital forms. Digital paperwork is not only more convenient, but also presents a patient retention opportunity, as patients are more invested in showing up to an appointment for which they have already completed their paperwork.



- Practices saying Digital Forms increase patient satisfaction



- Practices offering Digital Forms





## Clinical technology makes providing care easier

Of course, you can't talk about investing in technology without discussing patient equipment. Updating your clinical technology can help you to minimize pain and optimize results for your patients.

When asked what technology practices plan to invest in for 2023, the most popular investment, at 54%, is intraoral cameras.



*We started using our itero scanner for all of our hygiene patients and that's been incredible in terms of case acceptance.*

**Casey Cid**

616 Dental Studio

## There are several reasons why dentists are investing in intraoral cameras.

**Diagnosis:** These tools can help dentists to diagnose and treat dental problems more accurately. Digital scans can be used to create precise, 3D models of a patient's teeth, which can help dentists to plan and execute treatments more effectively.

**Communication:** Intraoral cameras can also help dentists to better educate and communicate more effectively with their patients. By showing visuals from their mouth, dentists can help patients understand the nature and extent of their condition. The digital component can even allow dentists to create comparison treatment plans that allow patients an opportunity to easily evaluate their options.

**Patient care:** With a clear treatment plan and communication, patients' case acceptance rates rise. Rather than waiting until they're in pain to seek care, patients are able to make proactive decisions based on their unique case.





State of Dental 2023

# Engaging Existing Patients



# How to automate your recalls

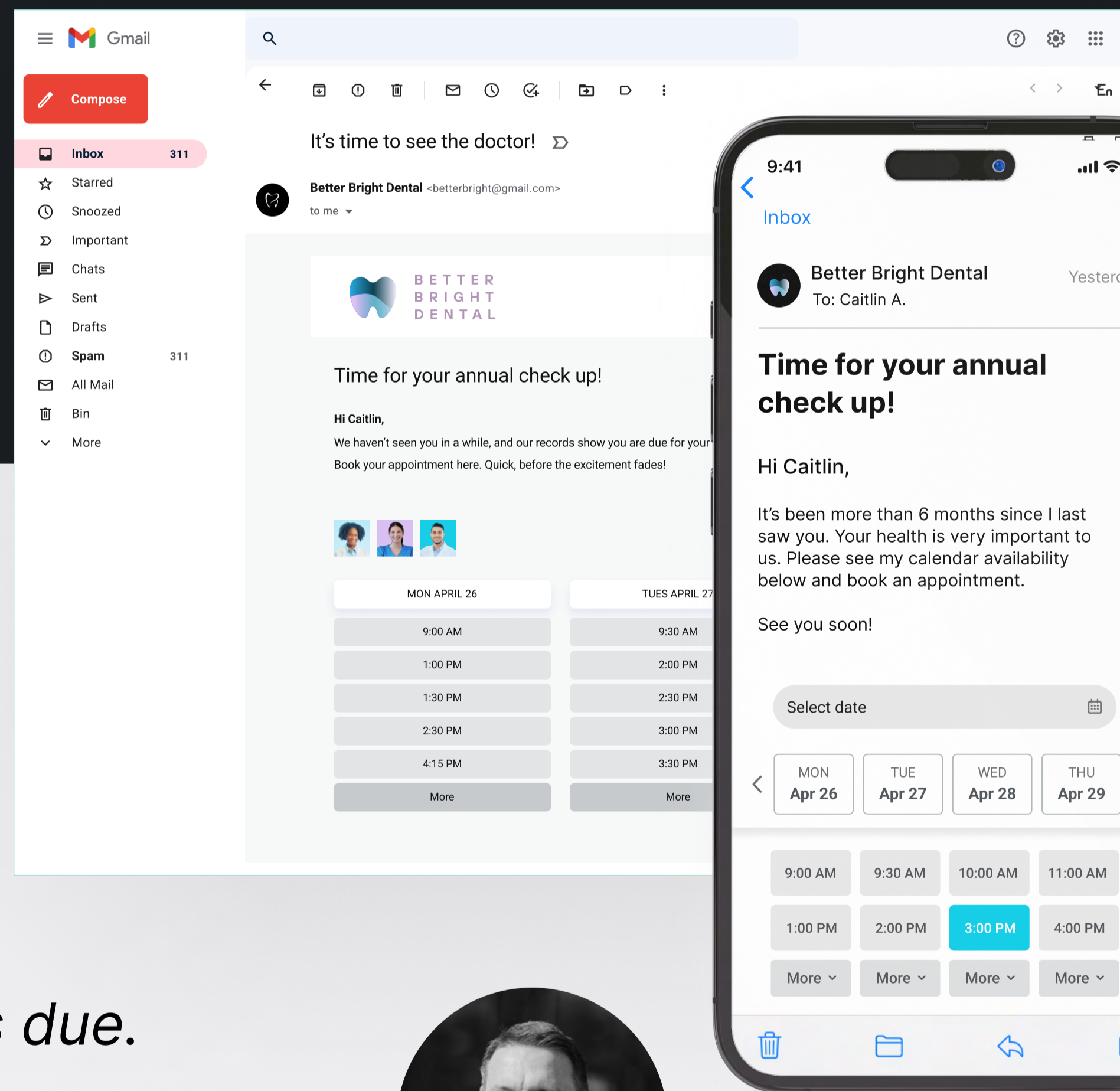
Encouraging patients to return for regular care is the lowest-hanging fruit to increase appointment volume. Patients need care every six months which will likely be covered by their insurance—a win-win scenario. Tracking and chasing down recall appointments can be depressingly time consuming for office managers.

Then make it as easy as possible for patients to make the appointment. For example, NexHealth saw it's [One-Click Recalls](#) product result in a 40% higher conversion rate by enabling patients to see real-time practice availability directly from an email or text message.

First, automate your recall reminders using a patient experience platform.



*Our recall system is on autopilot.  
We don't have to go looking for who's due.  
When patients are due, they get notified.  
Patients love that. We love that.*



**Dr. Watson**  
Owner, Dentist  
Dr. Michael Watson, DDS

## Why a digital waitlist is essential for boosting appointments

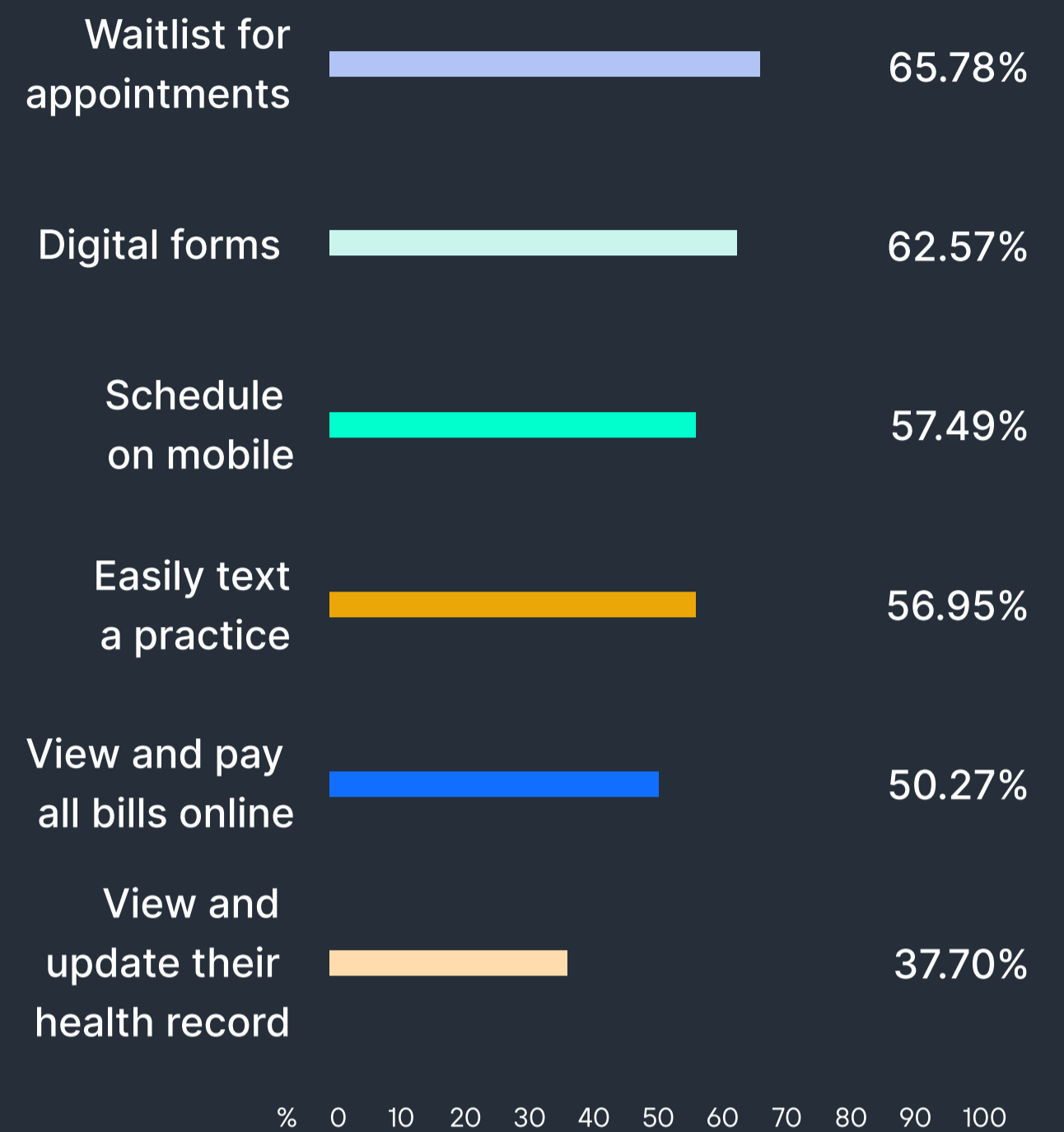
Patients have many excuses for not booking or showing up for recall appointments. No one knows their day-to-day schedule 6 months from now.

A digital waitlist allows practices to send patients a doctor's immediate day-of availability to fill last-minute schedule holes. Patients love this because they can confidently book an appointment knowing they can make the scheduled time.

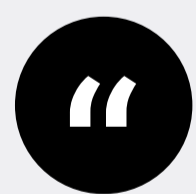
At NexHealth, we see the average waitlist fill time is less than ten minutes. Waitlist is also a revenue cash multiplier. **Norbo Dental estimates they generate \$3,000 in revenue each week with the Waitlist feature.**

[\[See how Norbo Dental uses the Waitlist to boost revenue\]](#)

What digital services do you think would improve patient satisfaction?



**66%** of offices say providing a digital waitlist helps patient satisfaction –the #1 opportunity to improve this important metric.



*We're filling 15 appointments per week on the schedule. That's almost a \$3,000 increase in revenue thanks to our ASAP Waitlist.*



**Kammie Ridley**  
Director of Operations  
Norbo Dental



## Use marketing campaigns to keep patients engaged in their care

We asked dentists how they plan to keep patients engaged, and the **#1** answer by far was **increased patient education**.

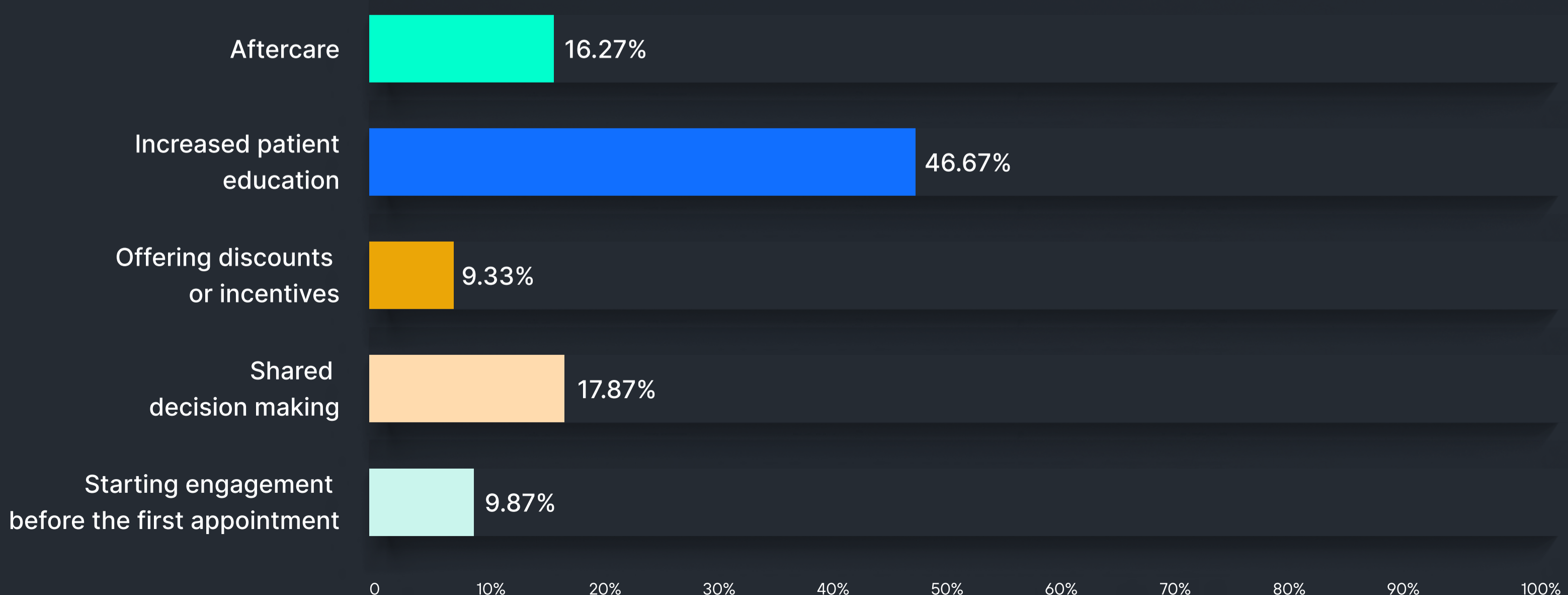
Educational campaigns can focus on your value-added services, answers to common benefits questions, and office updates.

Patients who understand the clinical necessity for their treatment plan are more likely to follow through. A few examples:

- Sharing brushing and flossing videos to teach patients proper hygiene techniques.
- Upselling Invisalign or additional treatments. Don't discount: Less than 10% of offices have found incentives or discounts to actually increase patient engagement or booking rates.
- Teaching about the importance and impact of a particular procedure, especially for less common procedures like periodontics or masseter Botox.
- Share knowledge with your patients to establish trust—and always include the link to book online.

Setting up an automating marketing campaign system is an easy way to deliver patient education content at scale.

In addition to recalls, which strategy has been most impactful to keep patients engaged in their care?





## Engaging Existing Patients

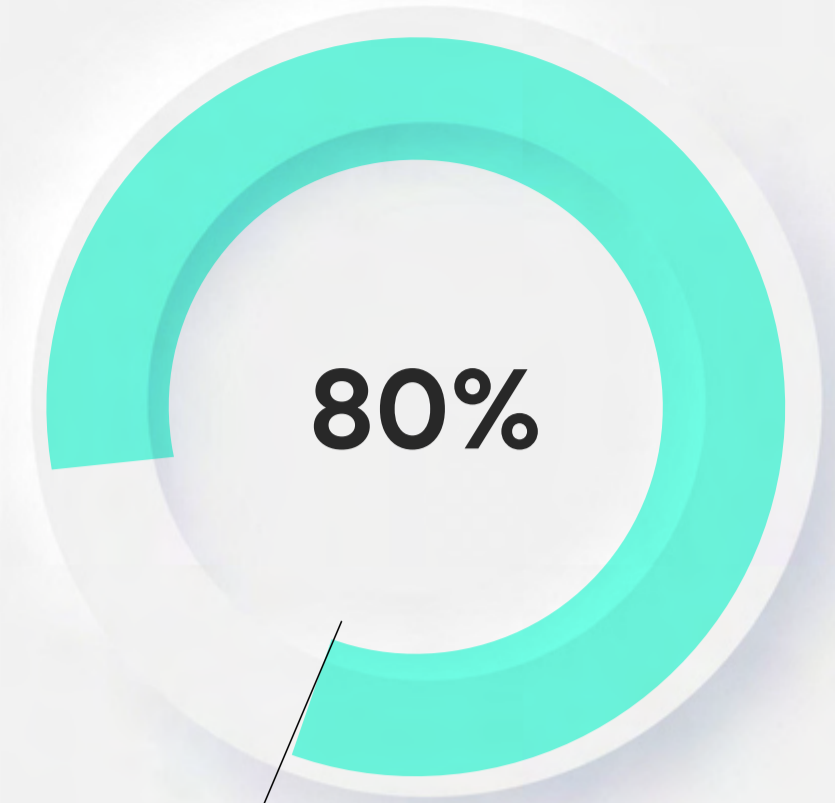
### Using Social Platforms to Acquire Patients

Dentists rank their top two objectives for 2023 as increasing the number of appointments and acquiring new patients.

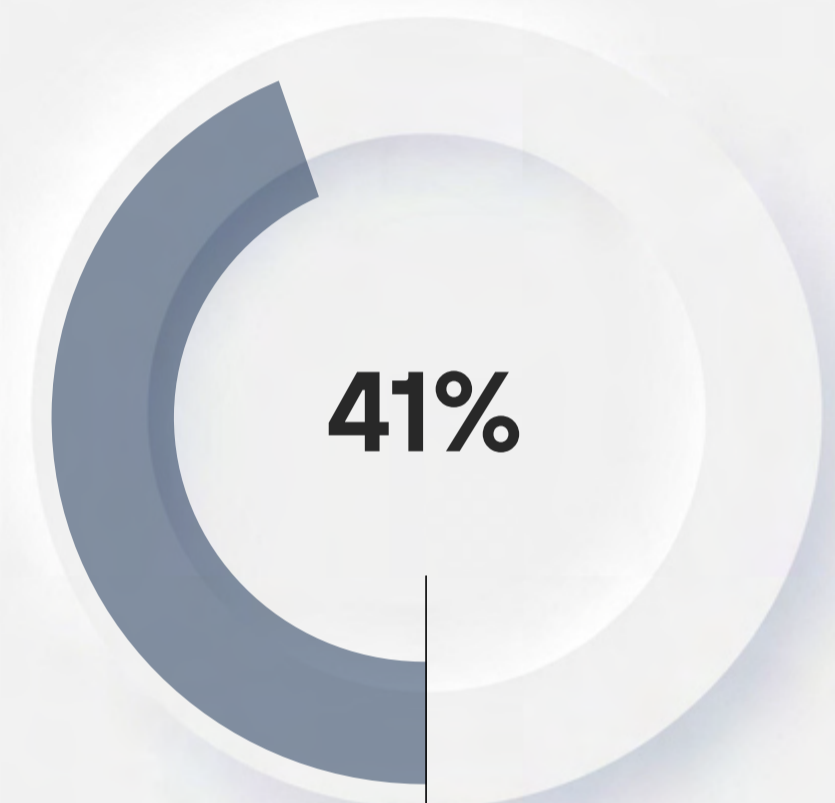
Since these goals will require both reaching and capturing attention, it makes sense that a growing number of practices are focusing on marketing through social platforms.

Over **80%** of respondents reported they are using social media to promote their practices. **41%** of all booking services are found through social media, creating an enormous opportunity for practices to boost their reach.

Of practices using social media, Facebook (**85%**) is by far the most popular channel for dentists to market their service. It's likely the channel of choice as dentists are the most active personally on Facebook, and have the most familiarity with that audience and how to market on the site.



- Practices Using Social Media



- Booking Services Found Through Social Media

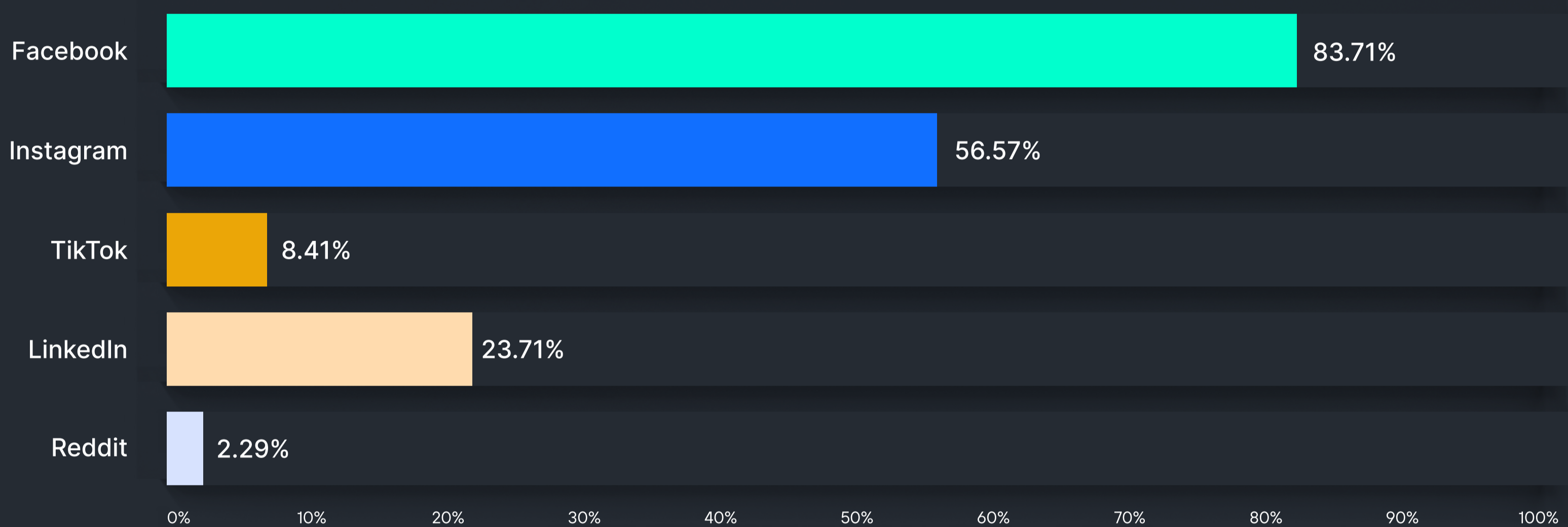


- Practices using Facebook

## Engaging Existing Patients

**57%** of dentists also use Instagram for marketing. Looking to TikTok though – now the #1 social network for daily active users and the best way to capture under 30 audiences– just over **8%** of dentists do any marketing on TikTok. The ones that do are seeing success, with an average of 3,000 followers each. This is a huge opportunity for savvy dentists to make your brand stand out.

Please select the social media platforms you use to promote your practice



Each platform has a unique flare and audience, so don't be afraid to experiment with your options to find the channel which best performs for you.



*TikTok lets patients see the creative side of the staff—it reduces the intimidation factor.*



**Dr. Cole Sutak**  
Owner, Dentist  
Lone Star Smiles

## Patient Engagement Strategies from Elite Practices

### Education

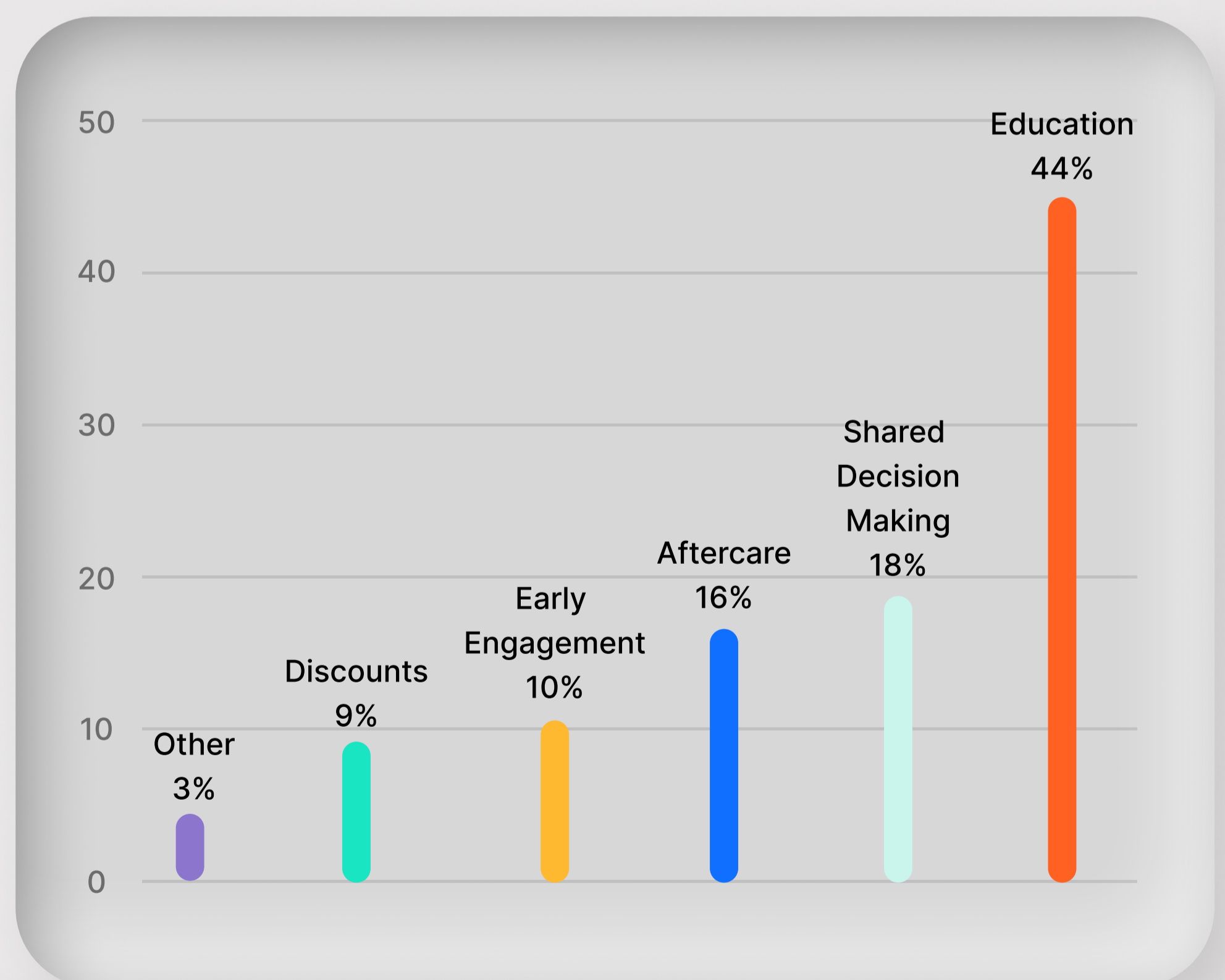
44% of Elite offices focus on providing education. That's because patients who understand the clinical necessity for their treatment plan are more likely to follow through. Offer education opportunities in your reminders, at the office, and even post-appointment.

### Campaigns

Campaigns are a great way to draw patients into the office. Run regular campaigns to keep your patients updated—on everything from the benefits of your services to updates in the office.

You don't have to default to sending discounts, either. Less than 10% of offices have found incentives or discounts to actually increase patient engagement or booking rates.

## What engagement strategies do you focus on?





# Create moments throughout the experience

Patient engagement is about more than just case acceptance. By building genuine moments of involvement and conversation into the patient experience, you are providing a supportive and meaningful relationship.

In particular, don't neglect the post-appointment experience. The healing process can be unclear, scary, and even painful. Reach out to patients post-op not only to assist in their healing process, but also to build trust and encourage patients to return when they need care again.





# State of Dental 2023

Despite the challenges, dental professionals are optimistic. The majority of Elite practices from 2022 expect to grow another 20%+ in 2023. They'll do this by using patient experience software to prevent cancellations, offer frictionless booking, improve patient satisfaction and acquire patients on social channels.

And almost 50% of practices that saw declining revenue in 2022 believe they'll be back in the positive growth in 2023. The reason for optimism are clear:

- |   |  |
|---|--|
| <p>1 Dentists have confidence that healthcare is resistant to the economic downturn</p>   | <p>2 Patient loyalty to practices is increasing</p>  |
| <p>3 New software technology is allowing dentists to deliver a patient-first experience, like easy appointment rescheduling</p> | <p>4 Dentists have more tools to engage with patients, offering expanded recall opportunities and increasing the percent of patients that regularly come back.</p> |

What will separate the Elite dental practices is a commitment to modernization. Top practices know they need to proactively retain staff, automate many of their manual processes, invest in the technology to improve the patient experience, and track and measure results.

What's uplifting about the State of Dental 2023 is that dental practices control their own destiny. They rightfully believe they can pass cars in the rain, and we expect to see a shift in 2023, with practices that embrace transformation replacing practices resistant to modernization.



For more information on how you can digitize your practice with online scheduling, digital forms, automated reminders and reviews schedule a demo at [NexHealth.com](https://NexHealth.com)