

2015 DENTIST SURVEY SUMMARY REPORT

Guidance • Support • Prevention • Protection

July, 2016

SURVEY OVERVIEW

SURVEY DESCRIPTION

Completed by almost all dentists with the license renewal in late summer 2015

Followed-up as needed by licensing board

The final response rate was 100%

SURVEY DESCRIPTION (continued)

Questions asked of dentists included:

- Gender and age
- Specialty
- Location and hours of practice
- Whether they were accepting new patients
- Whether they work with hygienists
- Years worked in Vermont
- Efforts to hire an associate

KEY FINDINGS

- There were 383 dentists working in Vermont
- 81% were primary care dentists, including:
 - *301 general dentists*
 - *11 pediatric dentists*
- 22% work 40 or more hours per week, while 51% work between 30 and 40 hours per week. (*This only counts direct patient care and does not include practice management.*)
- 15% practice in more than one location

KEY FINDINGS (continued)

- The 383 dentists correspond to 290.1 Full Time Equivalents (FTEs) (1 FTE = 40 hours/week)
- 50% of the dentists are 55 or older
- 21% are 65 or older
- 5 of the 11 pediatric dentists are 60 or older
- 7 of the 23 orthodontists are 60 or older
- 5 of the 13 endodontists are 60 or older
- In Rutland County, 61% of the general dentists are 60 or older - 42% are 65 or older.

KEY FINDINGS (continued)

In 2015, as compared with 2013:

- There are 14 more dentist in total
- There are 12 more dentists under age 45
- There are also 14 more dentists aged 55 and older
- There are 12 fewer in the 45-54 age group

KEY FINDINGS (continued)

In 2015, as compared with 2013:

- More dentists are working less than 30 hours per week
- There are only 1.7 more FTEs in primary care, and 2.4 fewer FTEs in specialty care
- We see a further shift from solo to group practices

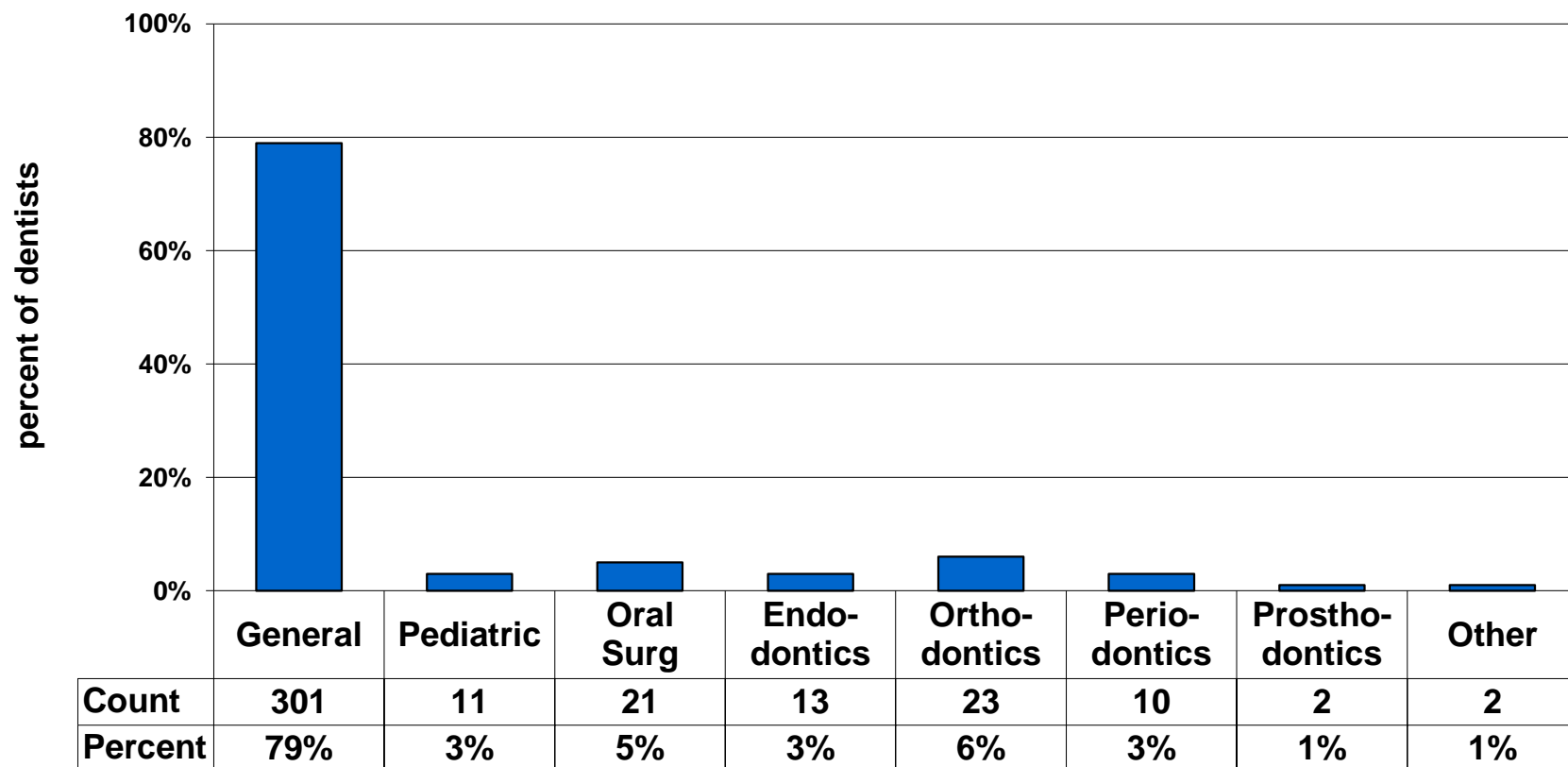
KEY FINDINGS (continued)

In 2015, as compared with 2013:

- Percentage accepting new Medicaid patients has remained about the same:
 - 65% accept any new Medicaid patients
 - 35% accept 5+ new Medicaid patients / month
- Average wait time to primary care appointment has increased from 3.2 to 3.6 weeks

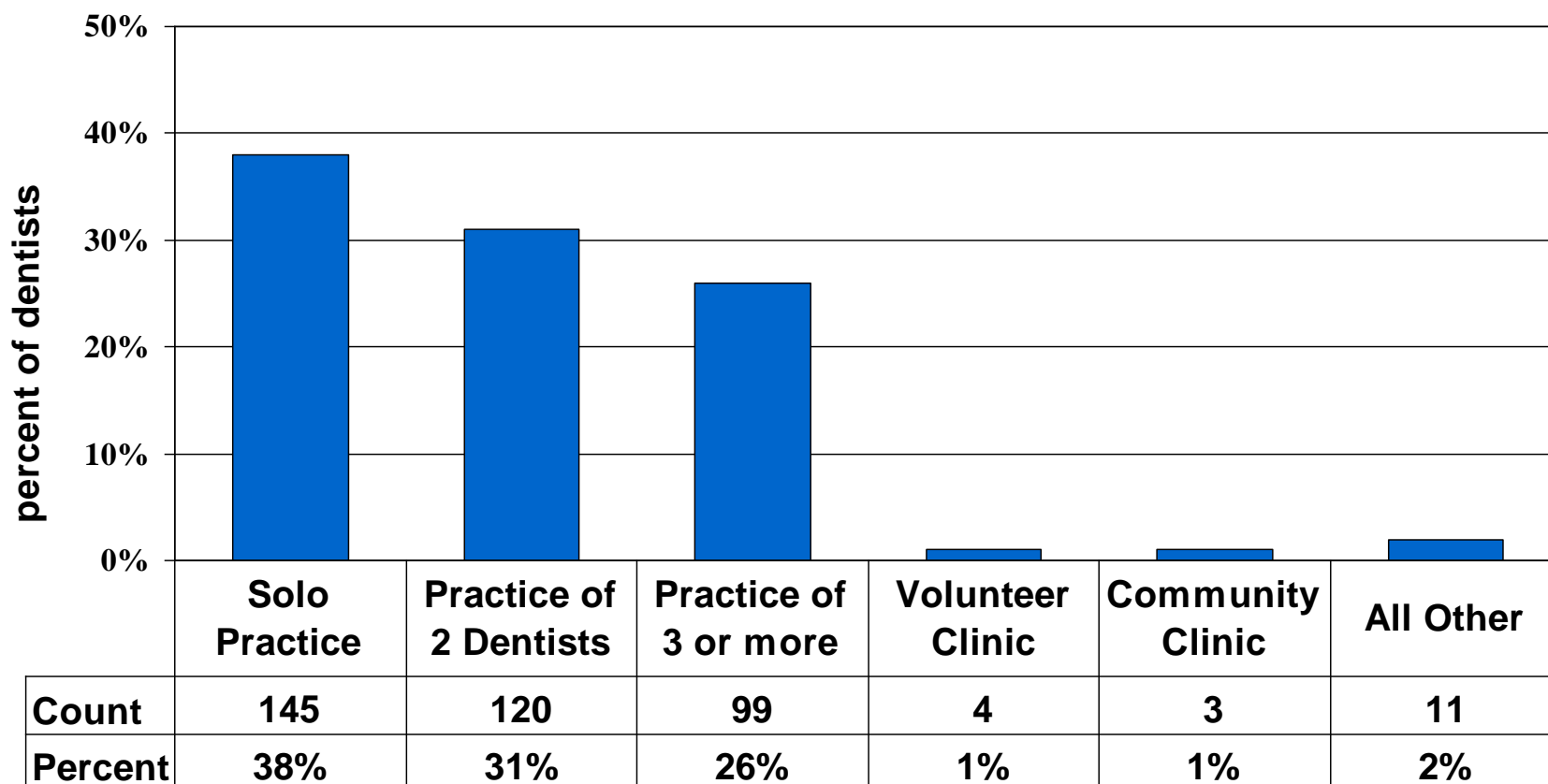
SURVEY QUESTION ANALYSIS

SPECIALTY



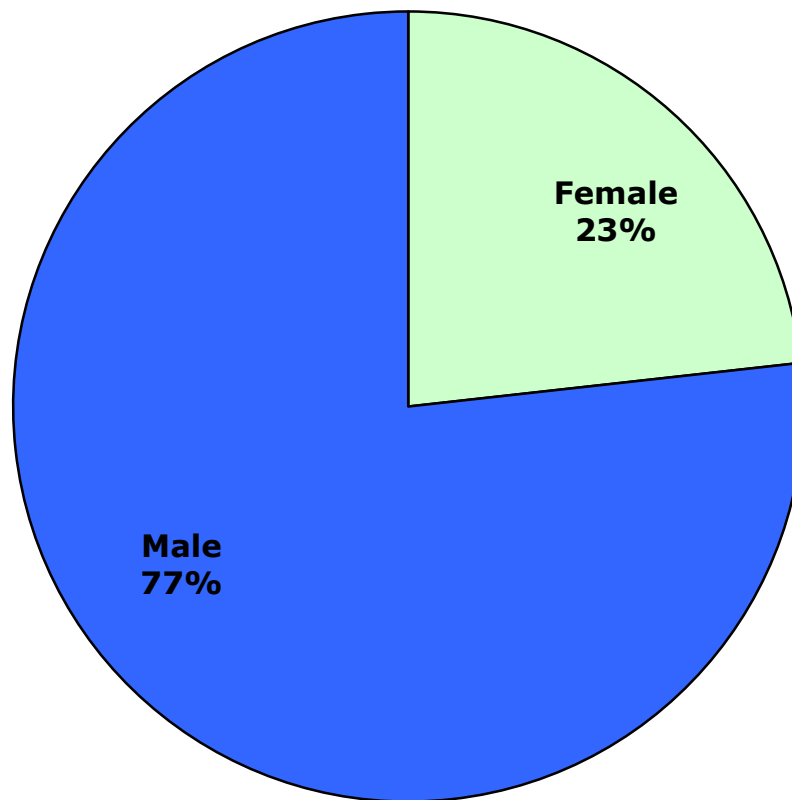
81% of dentists provide primary care (general or pediatric)

PRACTICE SETTING



57% of dentists work in a group practice

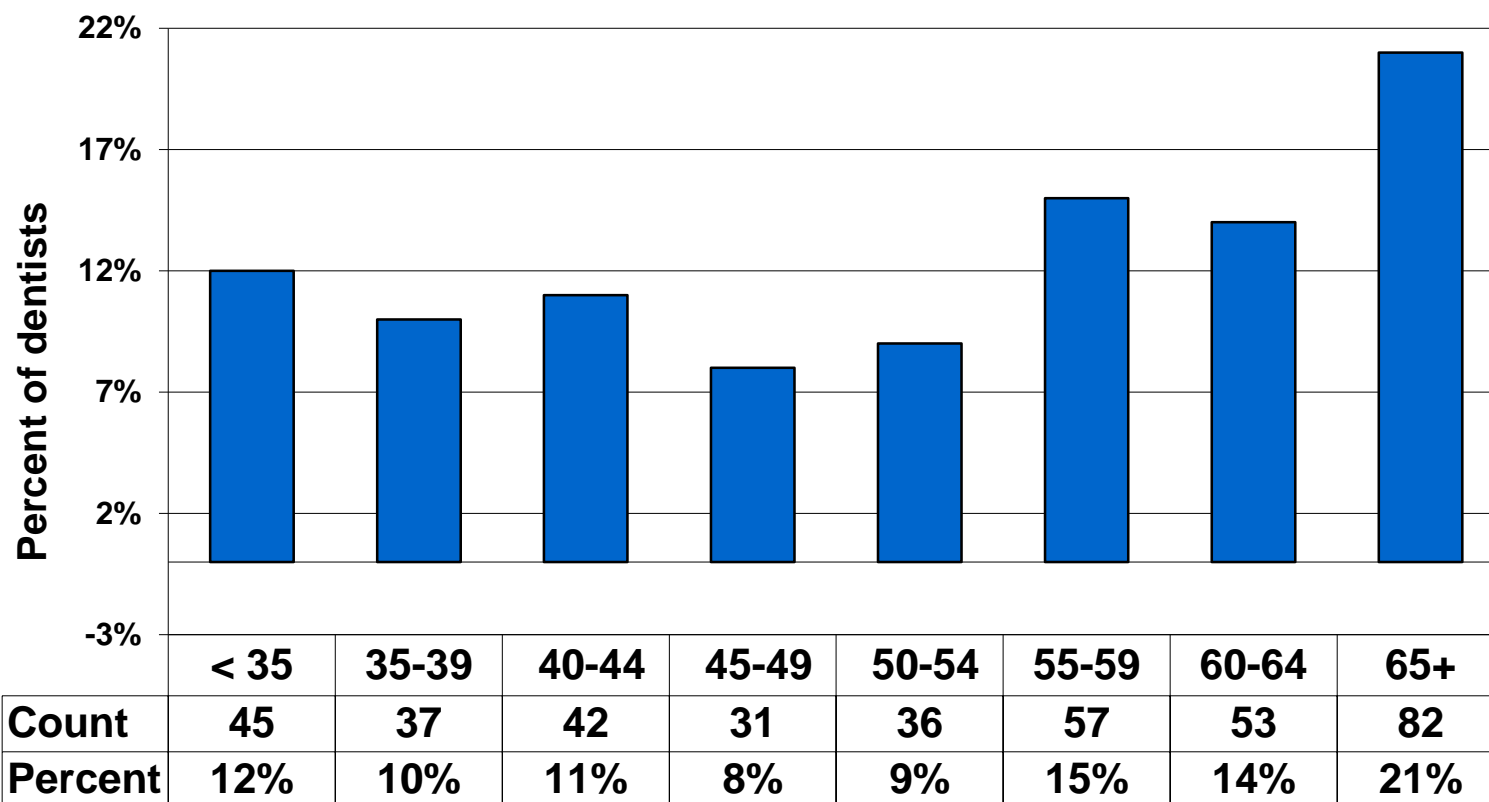
GENDER



294 of the dentists are male, 89 are female

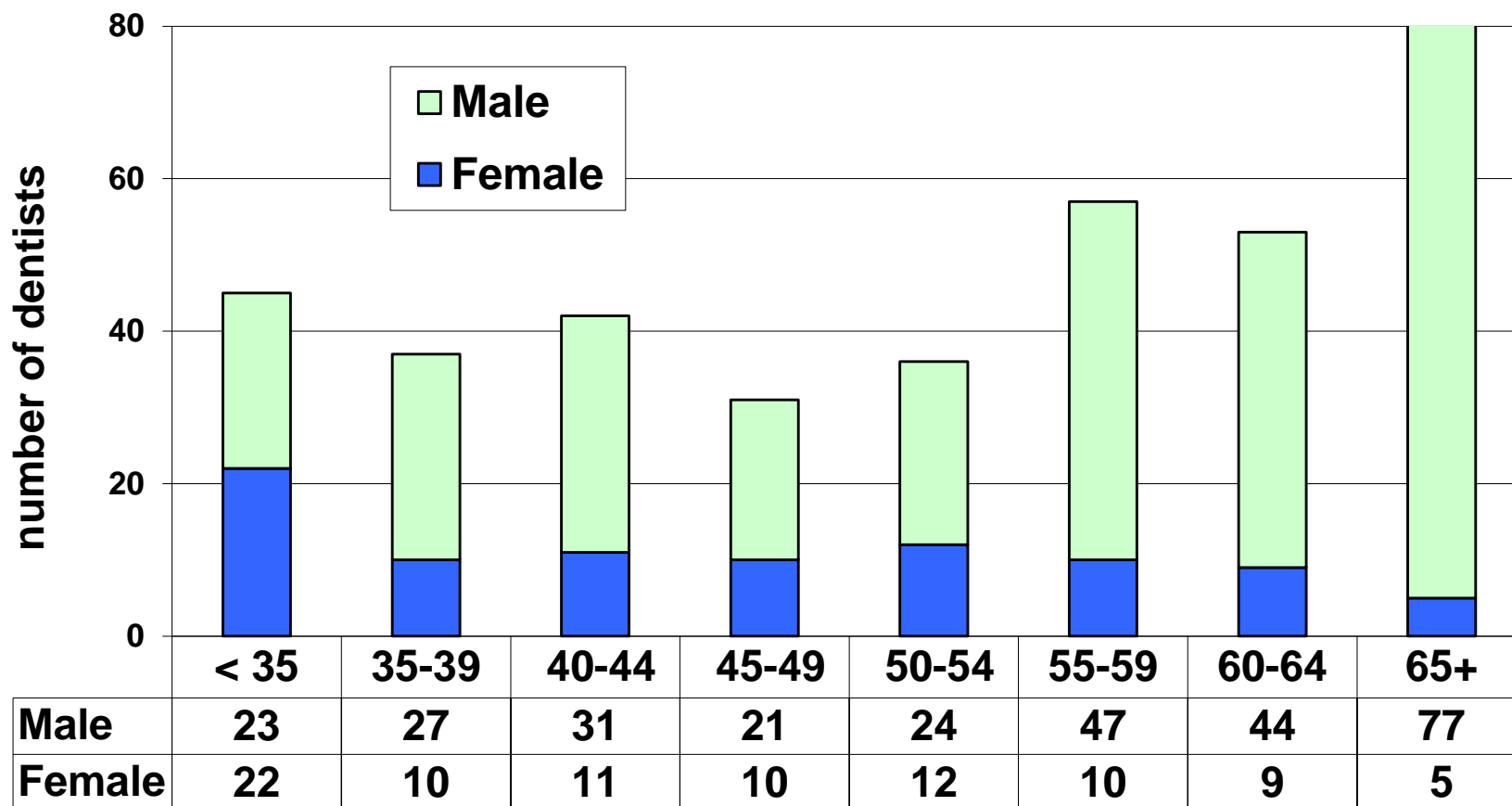
2015 Dentist Census

AGE DISTRIBUTION



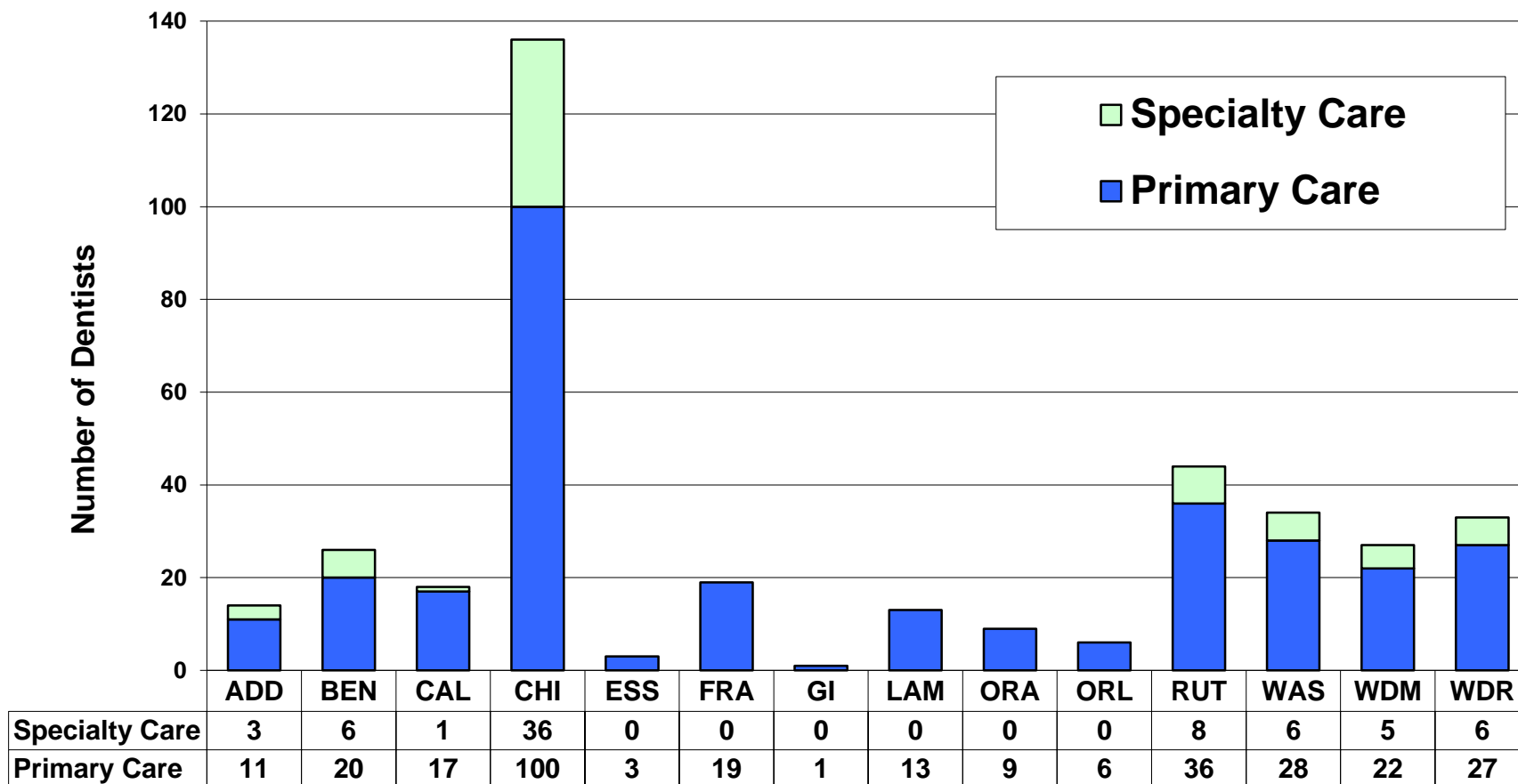
50% of all dentists are age 55 or older

AGE DISTRIBUTION BY GENDER



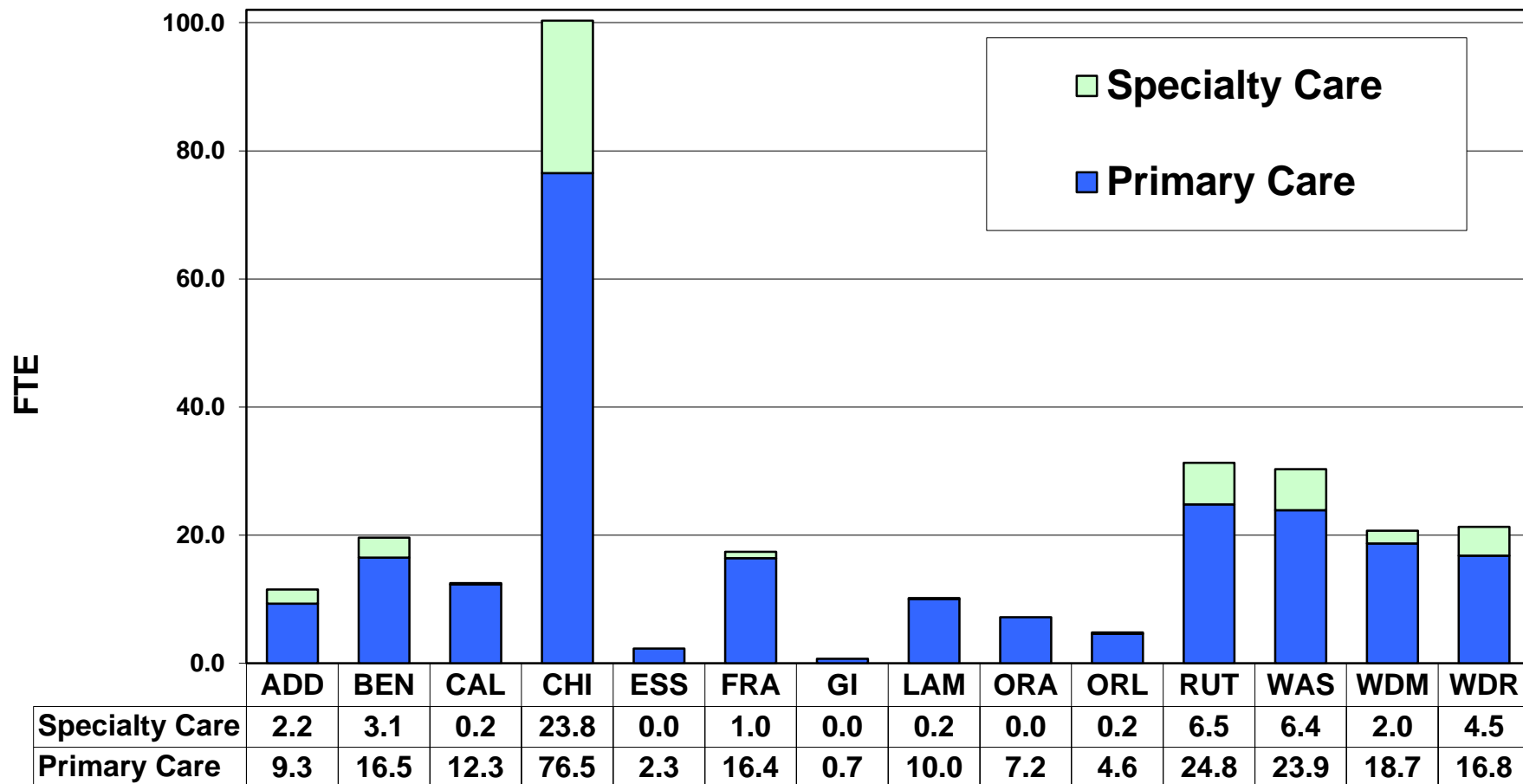
41% of the males, but only 16% of the females, are age 60 or older

NUMBER OF DENTISTS BY COUNTY



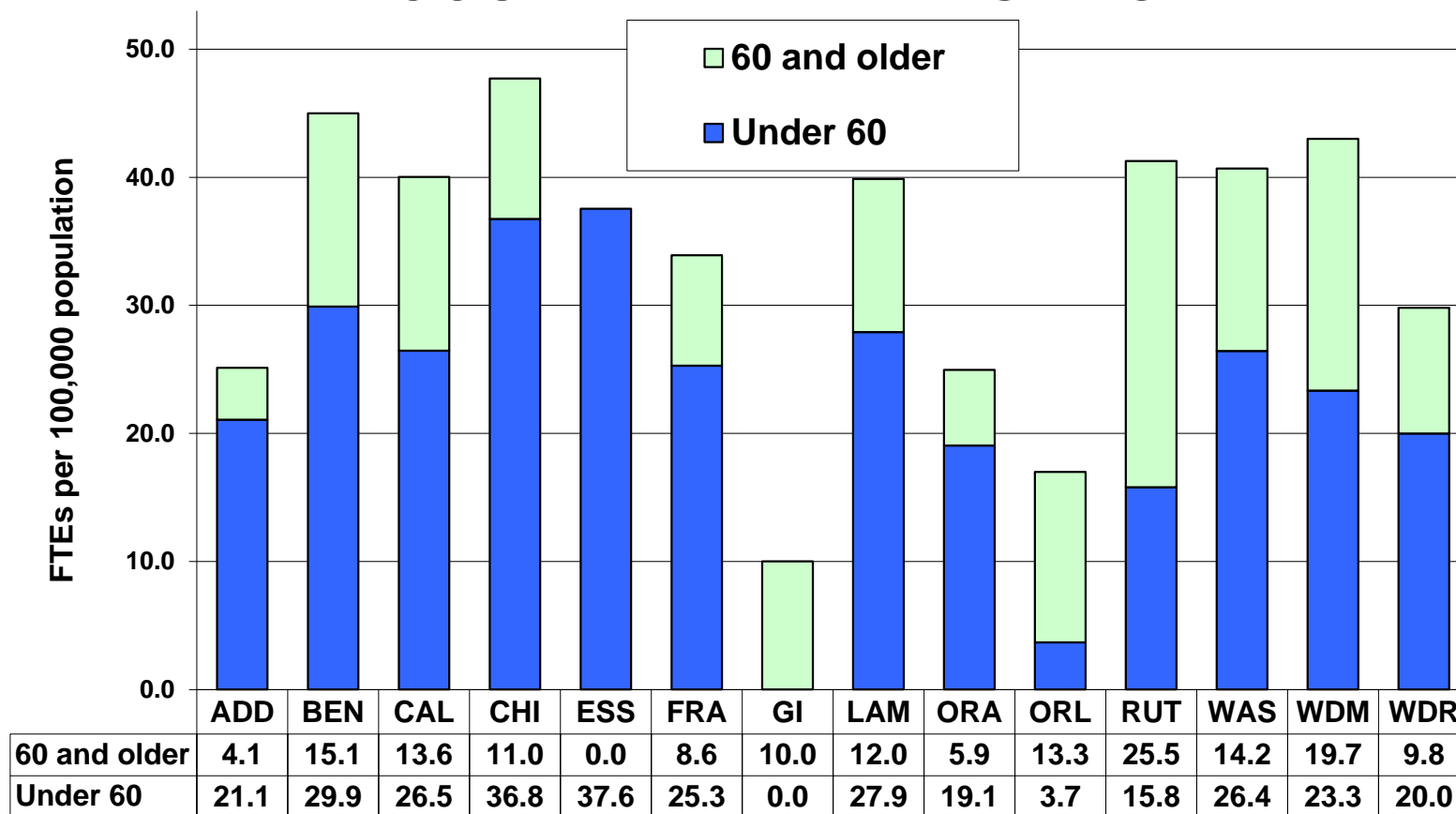
32% of primary care dentists, and 51% of specialists, work in Chittenden County

FULL TIME EQUIVALENT DENTISTS BY COUNTY



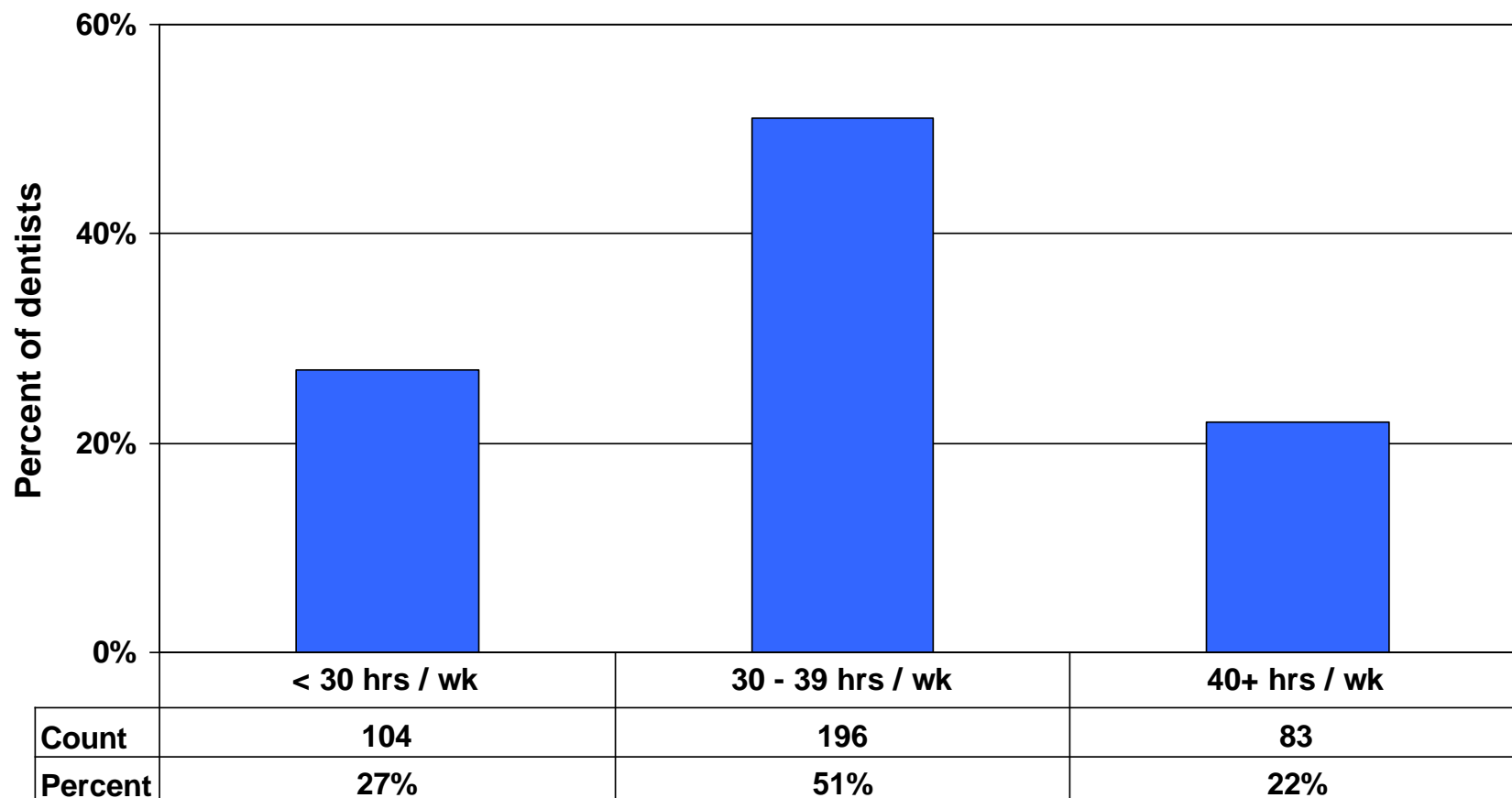
32% of primary care FTEs, and 48% of specialist FTEs, are in Chittenden County

PRIMARY CARE DENTIST TO POPULATION RATIOS BY COUNTY AND DENTIST AGE



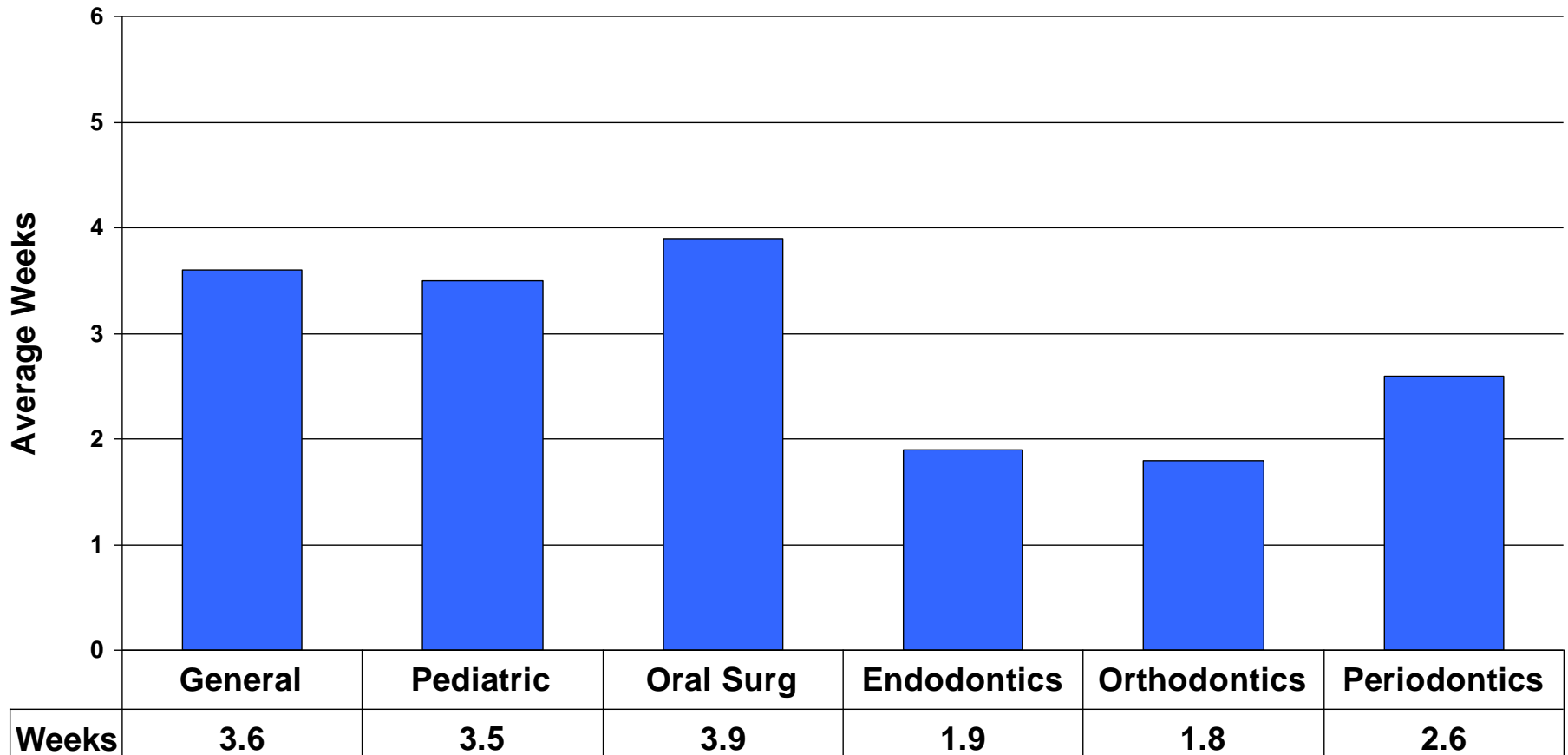
Grand Isle, Orleans & Rutland have the largest percentage of dentists age 60+

PATIENT CARE HOURS PER WEEK



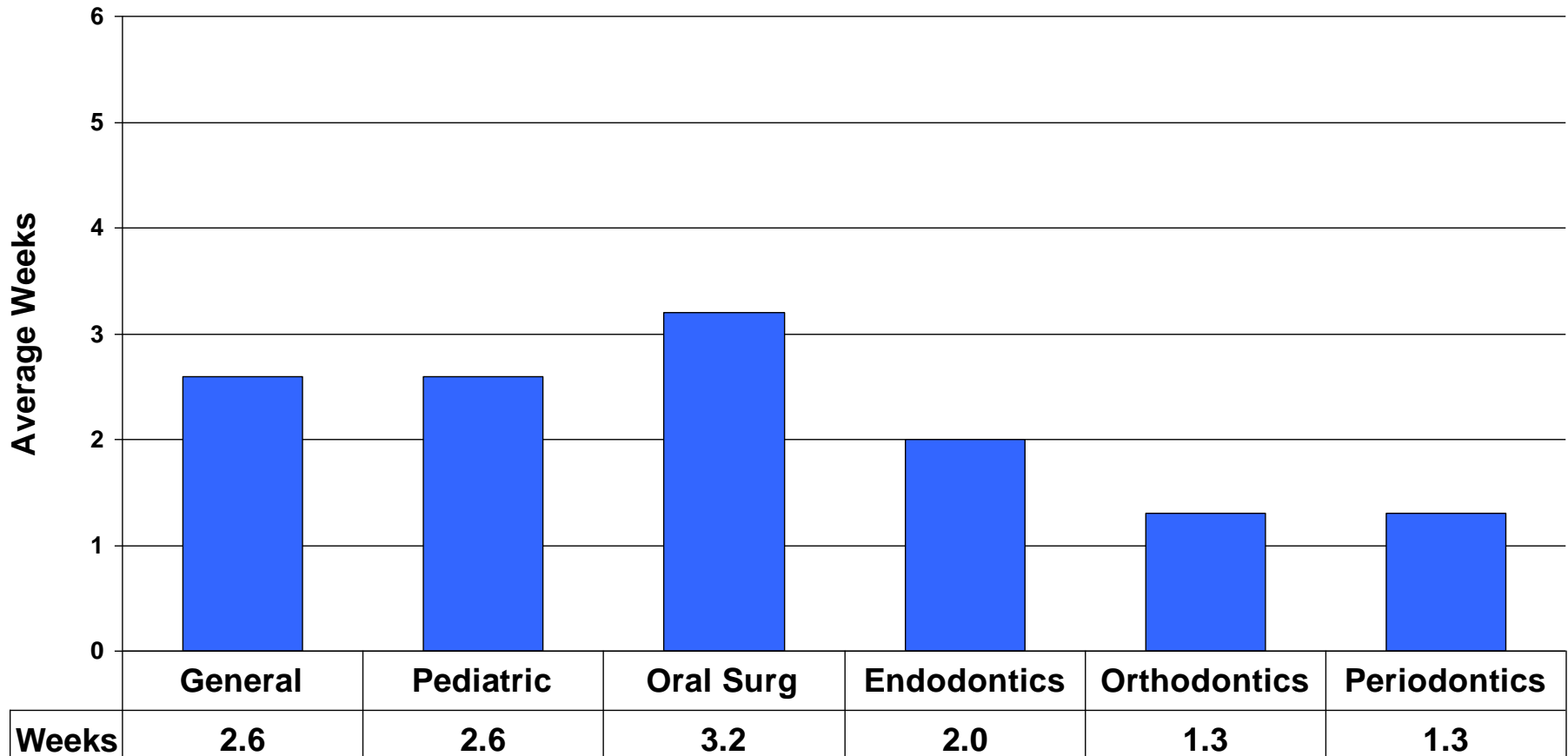
The average dentist provides 31 hours per week of patient care

AVERAGE WAIT TIME FOR NEW PATIENTS



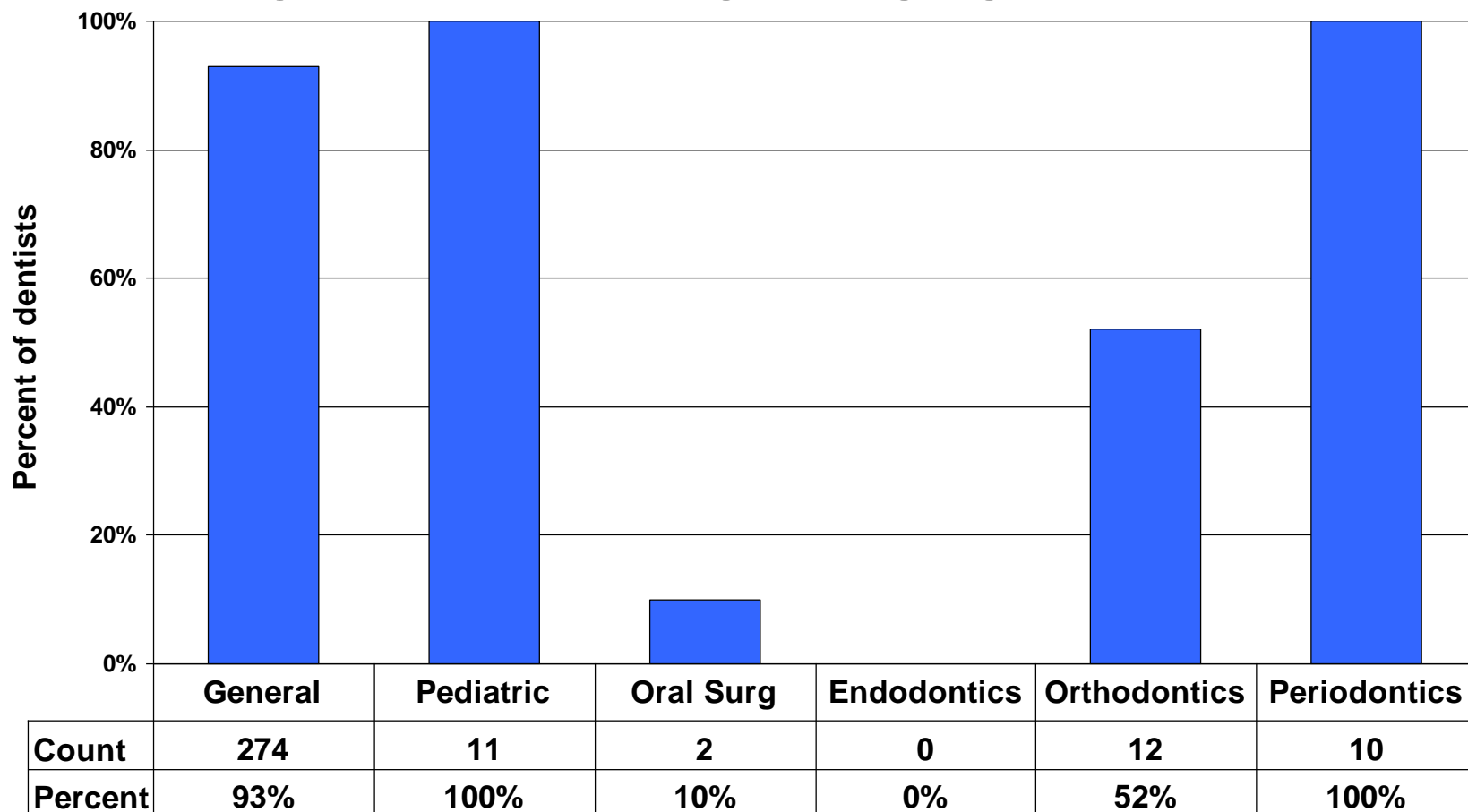
Average wait time for new patients of general dentists has increased since 2013

AVERAGE WAIT TIME FOR CURRENT PATIENTS



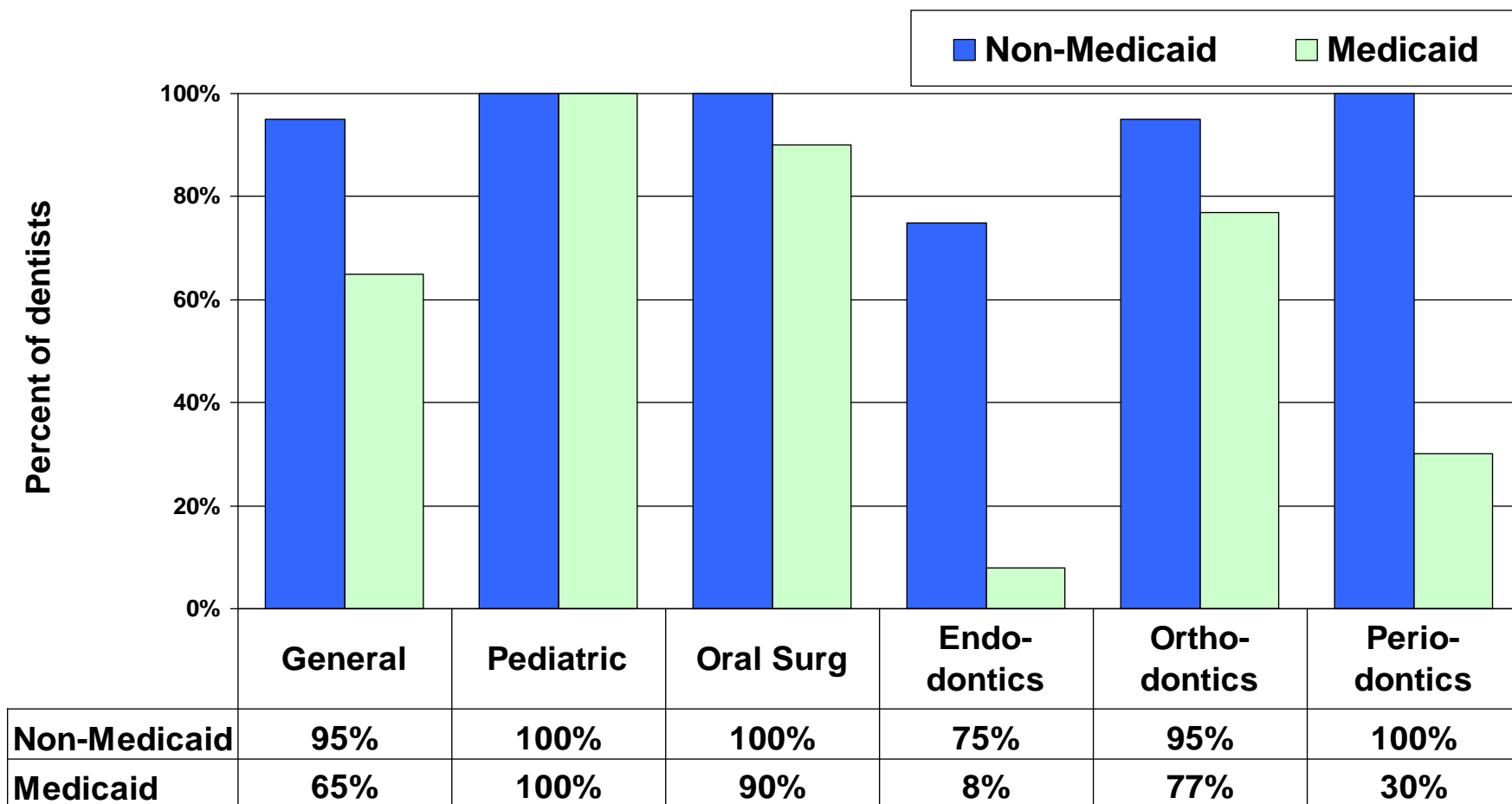
Average wait times for current patients have generally decreased since 2013

WORK WITH HYGIENISTS



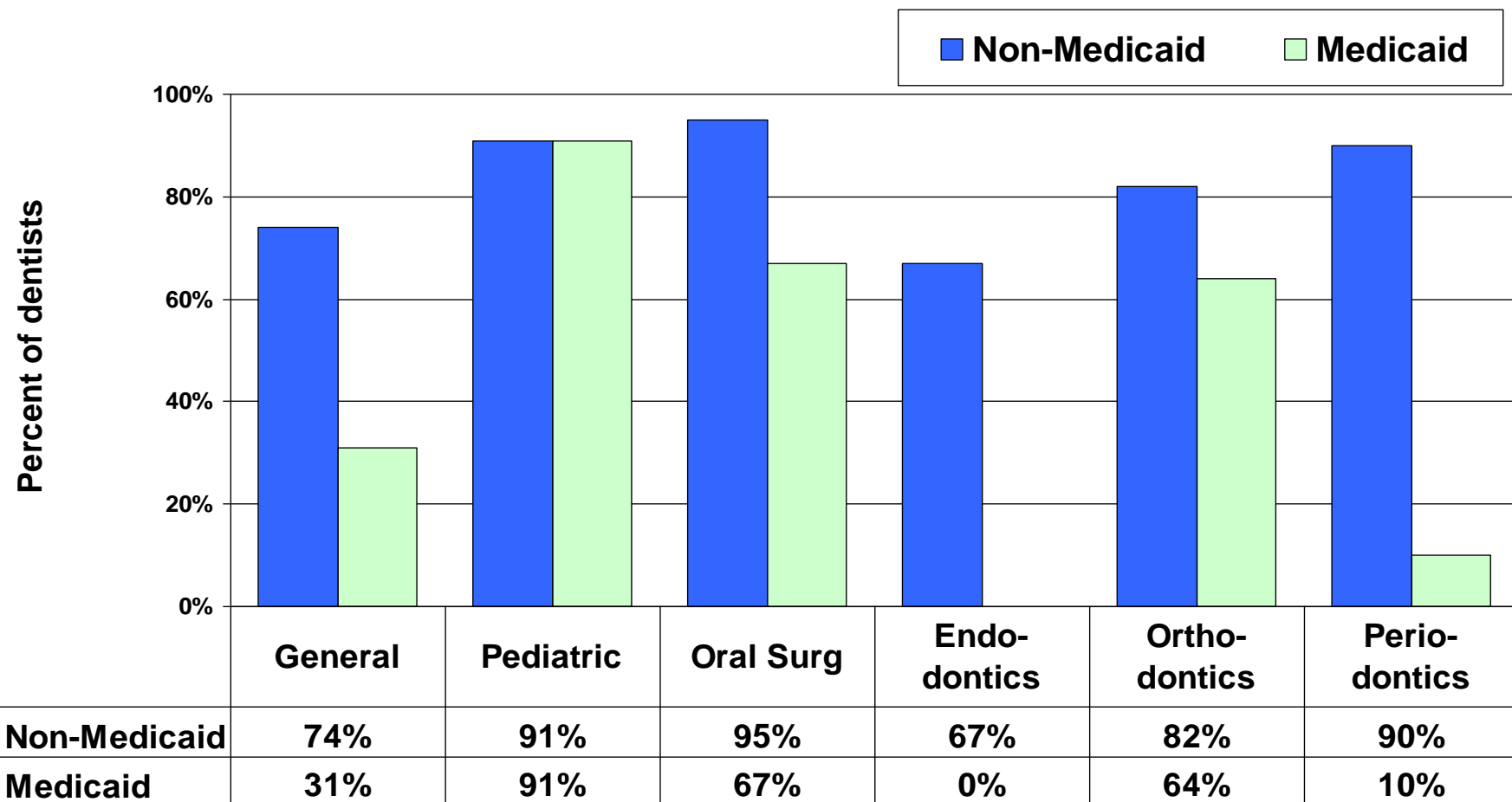
Overall 83% of dentists work with hygienists

ACCEPTING NEW PATIENTS



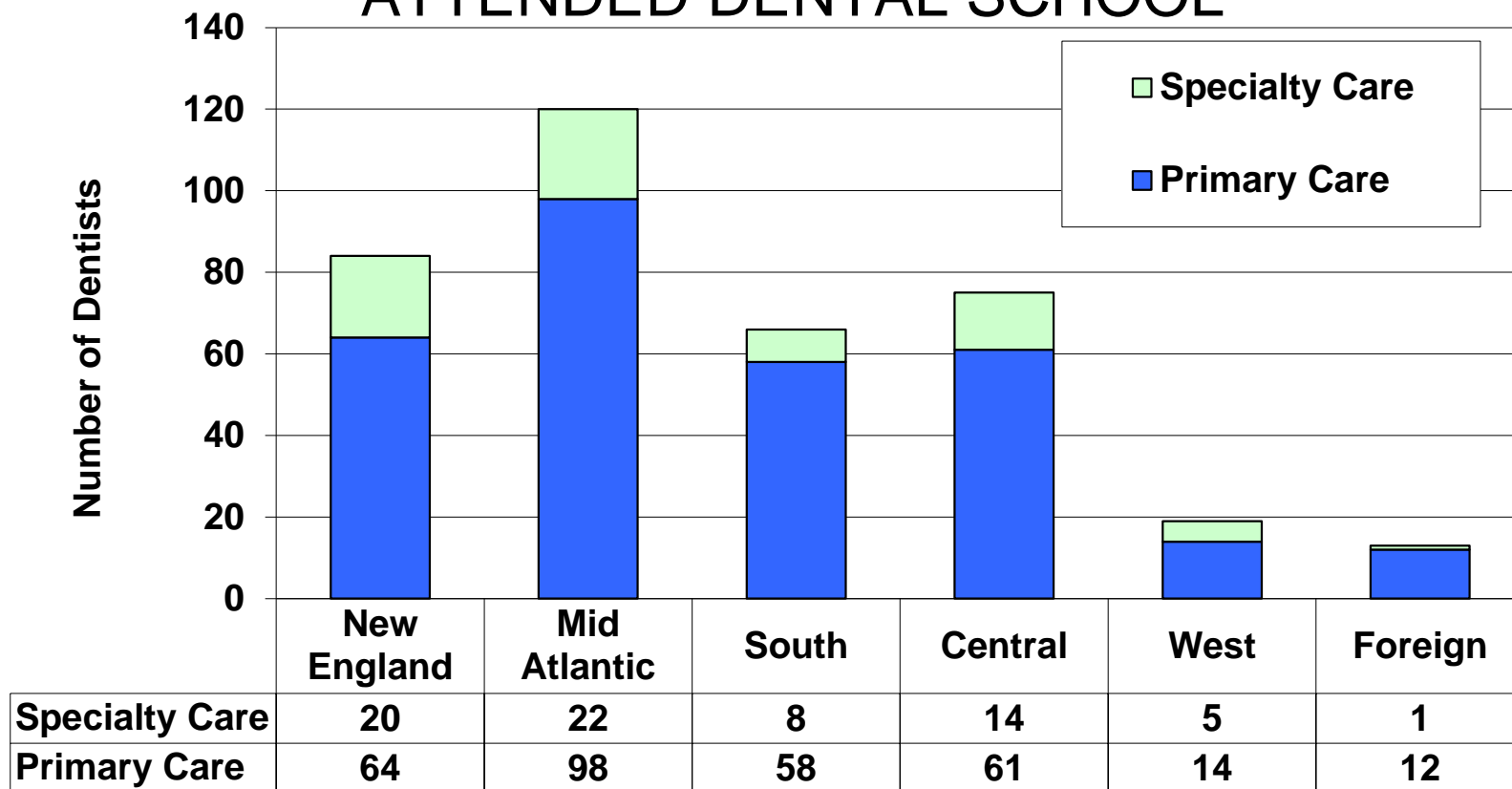
95% accepted new non-Medicaid patients, 65% accepted new Medicaid patients

ACCEPTING 5+ NEW PATIENTS / MONTH



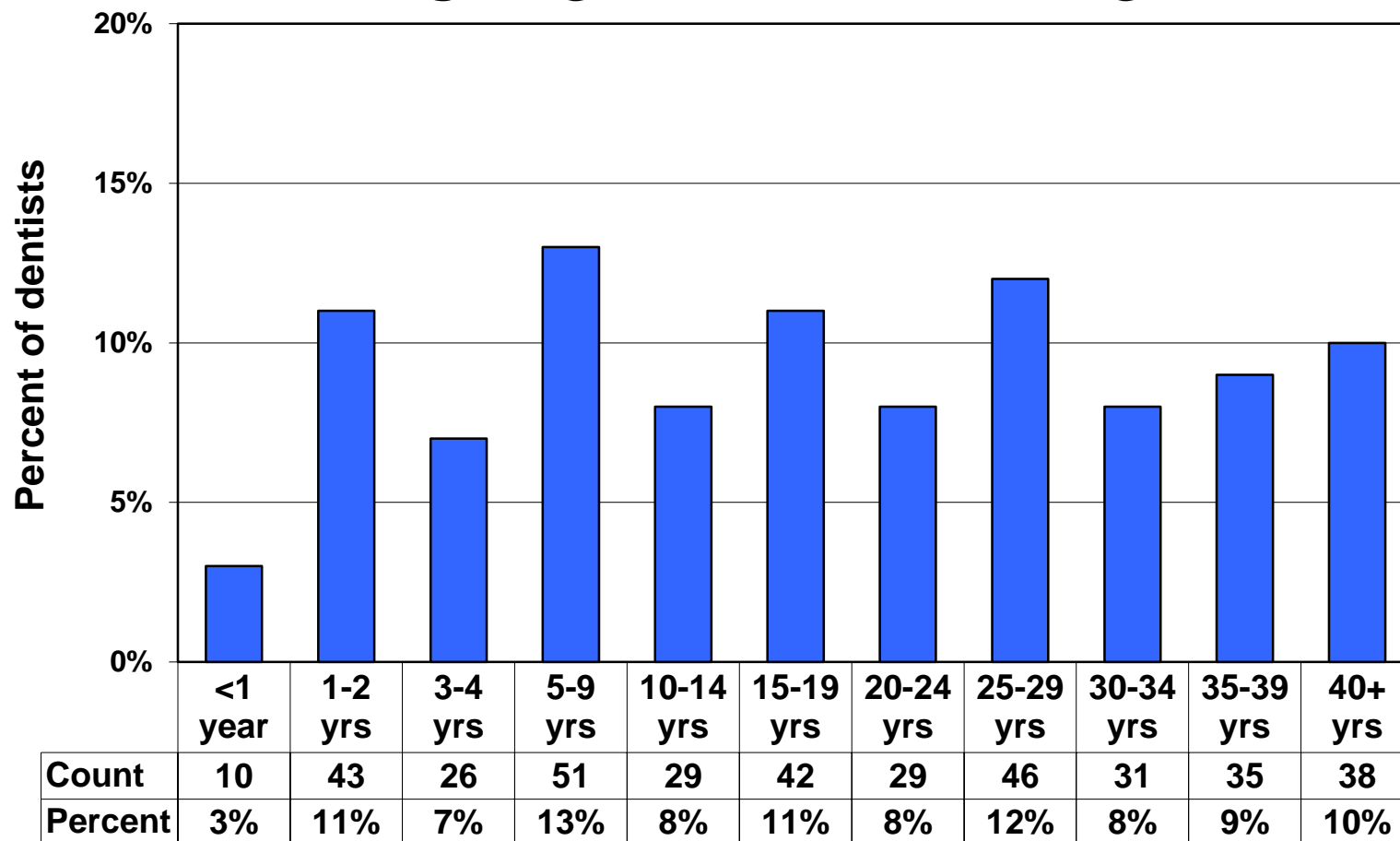
76% accepted 5+ new non-Medicaid patients, 35% accepted 5+ new Medicaid patients

WHERE VERMONT DENTISTS ATTENDED DENTAL SCHOOL



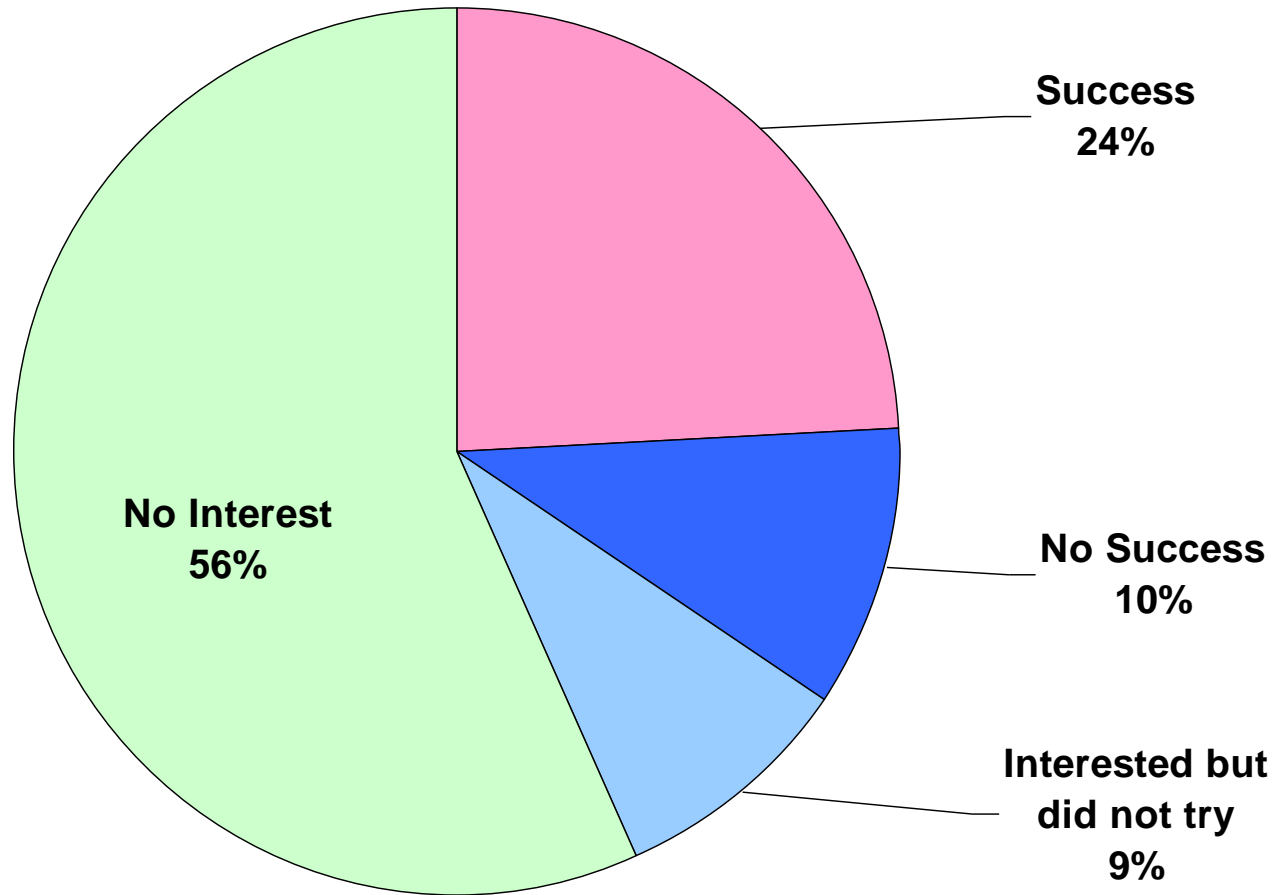
32% of primary care and 31% of specialty care dentists were trained in the mid-Atlantic region.

YEARS WORKED IN VERMONT



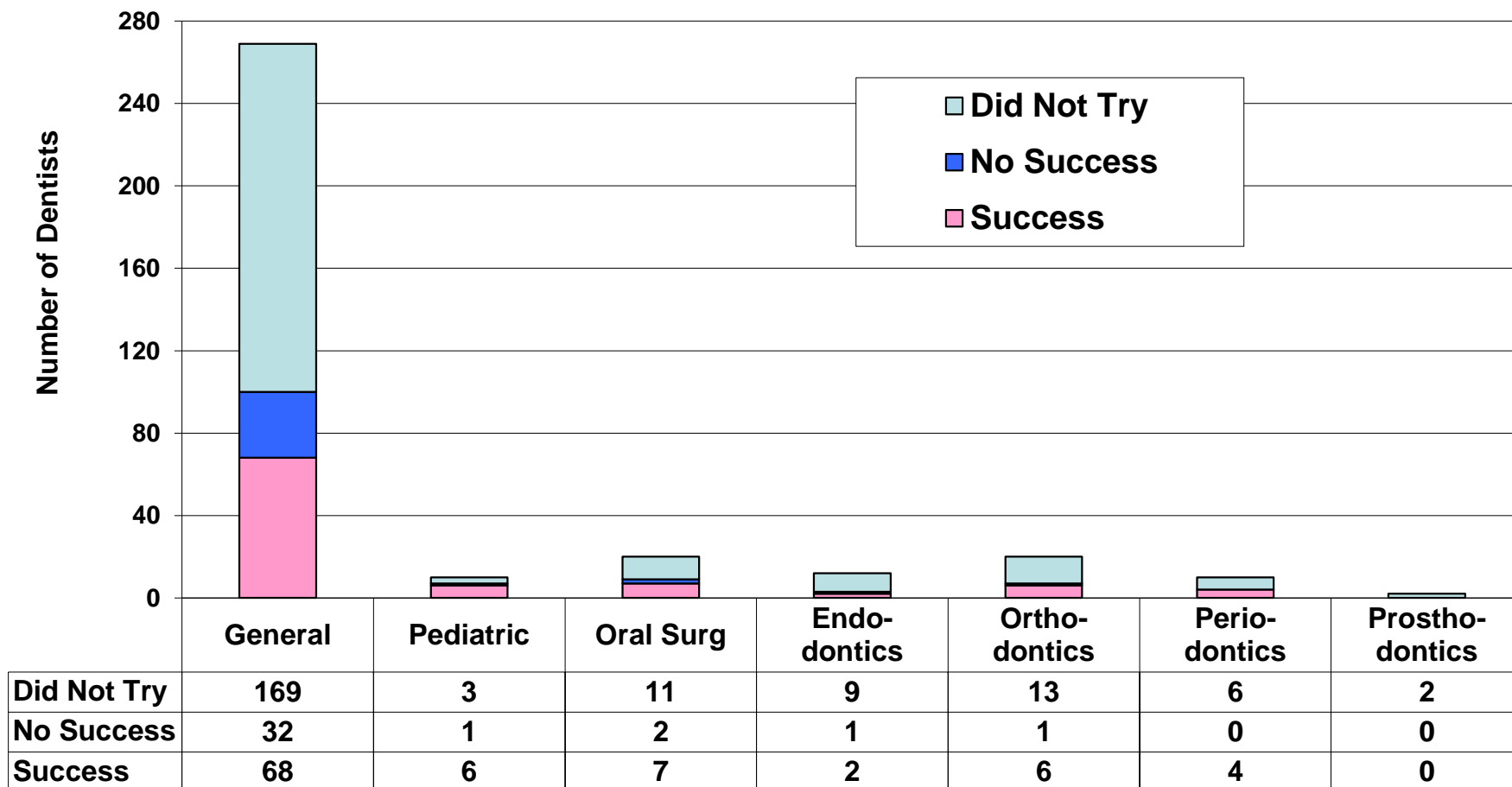
39% of the dentists have worked in Vermont for 25 or more years.

INTERESTED IN ADDING AN ASSOCIATE



2015 Dentist Census

INTERESTED IN ADDING AN ASSOCIATE



Overall, 44% of dentists were interested in recruiting an associate

COMPARISON WITH PREVIOUS SURVEYS

Numbers of Dentists by Specialty, 2005-2015

| | Count by main specialty | | | | | |
|-----------------------|-------------------------|------|------|------|------|------|
| | 2005 | 2007 | 2009 | 2011 | 2013 | 2015 |
| Total active dentists | 352 | 355 | 366 | 368 | 369 | 383 |
| Primary care dentists | 278 | 282 | 292 | 297 | 298 | 312 |
| General practice | 269 | 272 | 280 | 288 | 286 | 301 |
| Pediatric dentistry | 9 | 10 | 12 | 9 | 12 | 11 |
| Specialist dentists | 74 | 73 | 74 | 71 | 71 | 71 |
| Oral Surgery | 19 | 24 | 26 | 23 | 23 | 21 |
| Endodontics | 9 | 7 | 9 | 10 | 11 | 13 |
| Orthodontics | 27 | 27 | 24 | 25 | 24 | 23 |
| Periodontics | 12 | 11 | 12 | 11 | 10 | 10 |
| Prosthodontics | 4 | 2 | 2 | 1 | 1 | 2 |
| Other Specialties | 3 | 2 | 1 | 1 | 2 | 2 |

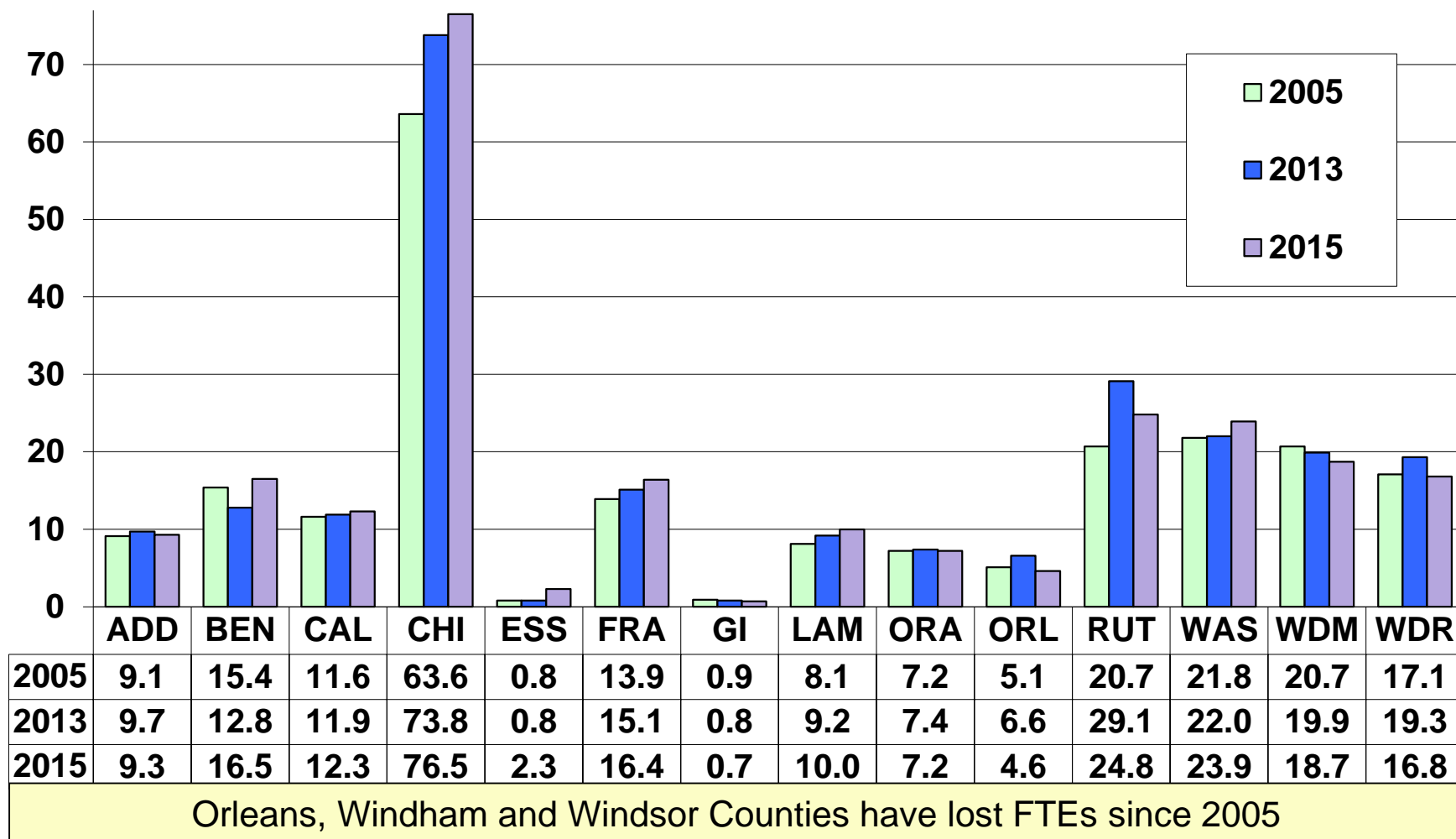
Full Time Equivalents by specialty, 2005-2015

| | Full Time Equivalents (FTE) | | | | | |
|-----------------------|-----------------------------|-------|-------|-------|-------|-------|
| | 2005 | 2007 | 2009 | 2011 | 2013 | 2015 |
| Total active dentists | 267.1 | 269.8 | 271.6 | 281.2 | 290.8 | 290.1 |
| Primary care dentists | 216.0 | 221.6 | 217.7 | 229.0 | 238.4 | 240.1 |
| General practice | 209.1 | 214.9 | 209.9 | 222.6 | 230.4 | 231.7 |
| Pediatric dentistry | 6.9 | 6.7 | 7.8 | 6.5 | 8.0 | 8.4 |
| Specialist dentists | 51.1 | 48.2 | 53.9 | 52.1 | 52.4 | 50.0 |
| Oral Surgery | 15.1 | 16.2 | 19.0 | 17.6 | 16.4 | 14.6 |
| Endodontics | 7.1 | 6.4 | 7.0 | 7.1 | 9.2 | 7.6 |
| Orthodontics | 16.9 | 17.2 | 17.4 | 17.9 | 17.1 | 17.3 |
| Periodontics | 7.2 | 5.7 | 7.8 | 7.7 | 7.0 | 7.5 |
| Prosthodontics | 1.9 | 1.5 | 1.6 | 0.9 | 0.9 | 1.1 |
| Other Specialties | 2.7 | 1.2 | 1.0 | 1.0 | 1.8 | 2.0 |

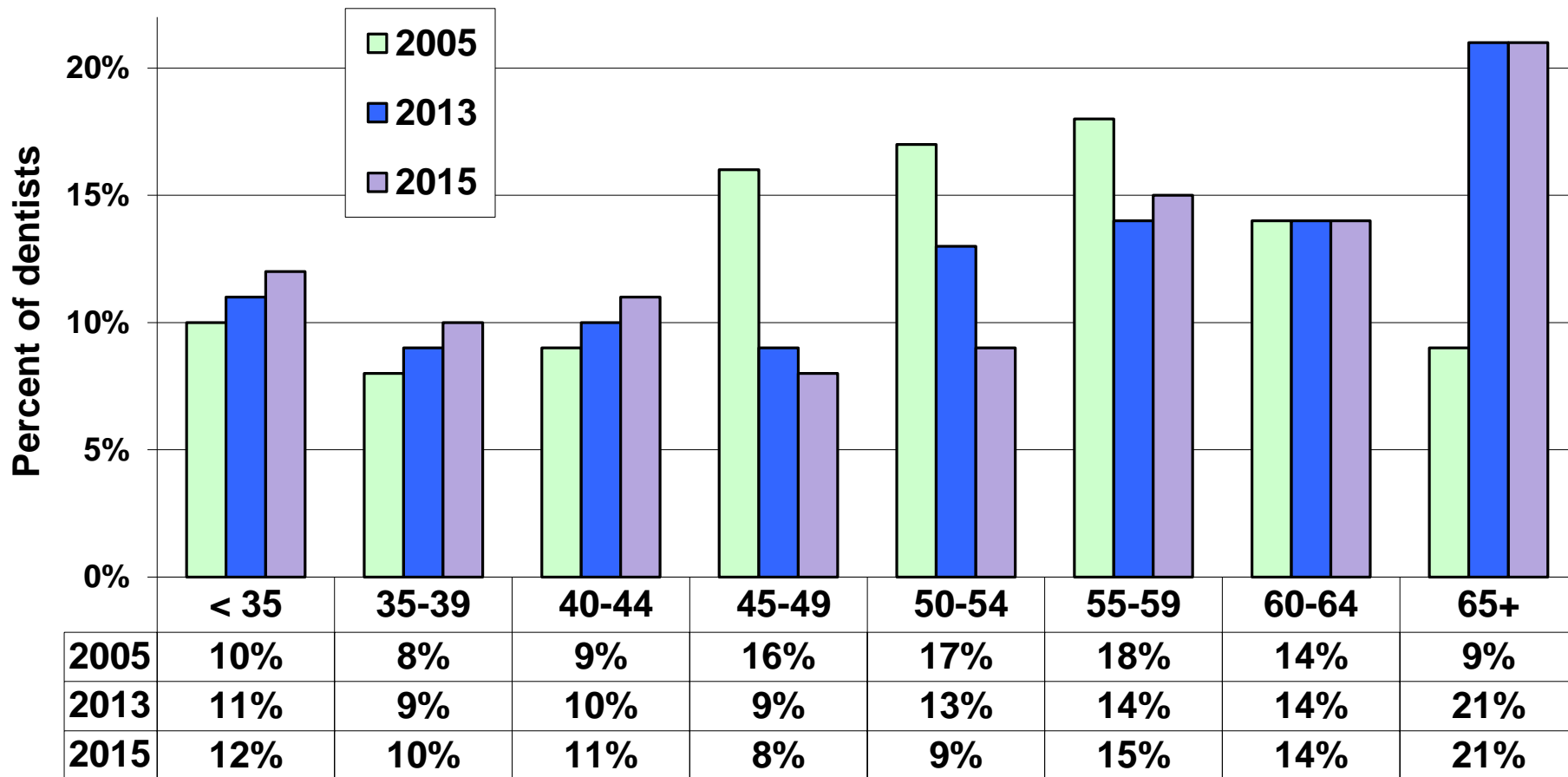
Selected indicators, 2005-2015

| | 2005 | 2007 | 2009 | 2011 | 2013 | 2015 |
|--|-------------|-------------|-------------|-------------|-------------|-------------|
| Total number of active dentists | 352 | 355 | 366 | 368 | 369 | 383 |
| Percent age 55 or older | 41% | 44% | 47% | 49% | 48% | 50% |
| Percent age 60 or older | 22% | 26% | 30% | 34% | 34% | 35% |
| Percent age 65 or older | 9% | 10% | 13% | 17% | 21% | 21% |
| Average patient care hours per week | 31 | 31 | 30 | 31 | 33 | 30 |
| Primary care: | | | | | | |
| FTEs / 100,000 population | 34.8 | 35.5 | 34.8 | 36.6 | 38.0 | 38.3 |
| % accepting new patients | 88% | 90% | 92% | 92% | 90% | 96% |
| % accepting new Medicaid patients | 59% | 60% | 65% | 69% | 63% | 66% |
| Average weeks wait - new patients | 3.6 | 3.5 | 2.9 | 2.8 | 3.2 | 3.6 |
| Percent working with dental hygienists | 88% | 90% | 91% | 92% | 93% | 93% |
| % of FTEs in Chittenden County | 29% | 30% | 31% | 31% | 31% | 32% |
| Specialty care: | | | | | | |
| FTEs / 100,000 population | 8.2 | 7.7 | 8.6 | 8.3 | 8.4 | 8.0 |
| % of FTEs in Chittenden County | 44% | 44% | 42% | 41% | 43% | 48% |

PRIMARY CARE FTEs, BY COUNTY, 2005-2015

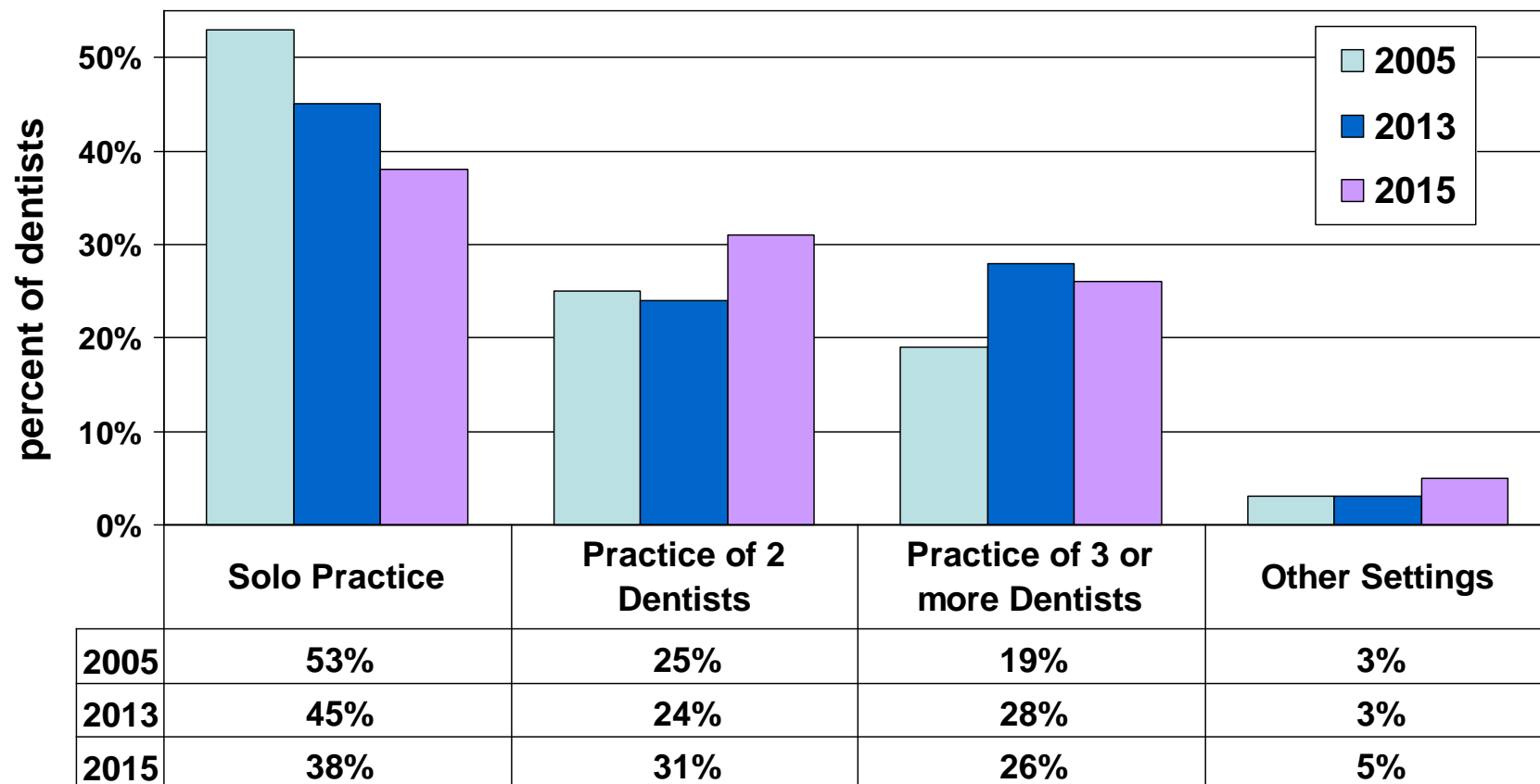


AGE DISTRIBUTION, 2005-2015



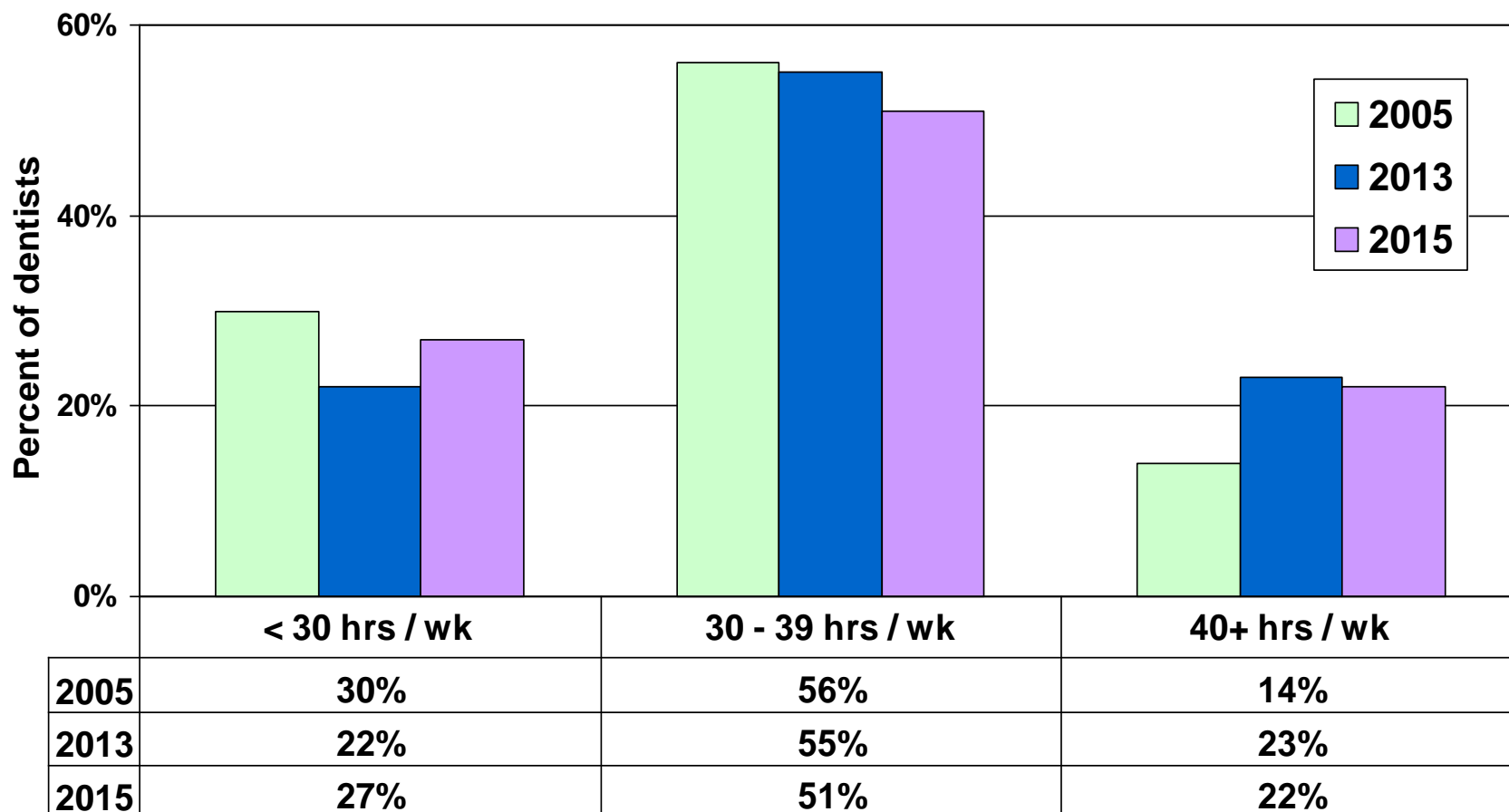
There have been increases in the percent of dentists under 45 and 65+

PRACTICE SETTING, 2005-2015



The trend from solo to group practice continues

PATIENT CARE HOURS PER WEEK



More dentists worked 40+ hours per week in 2015 than in 2005