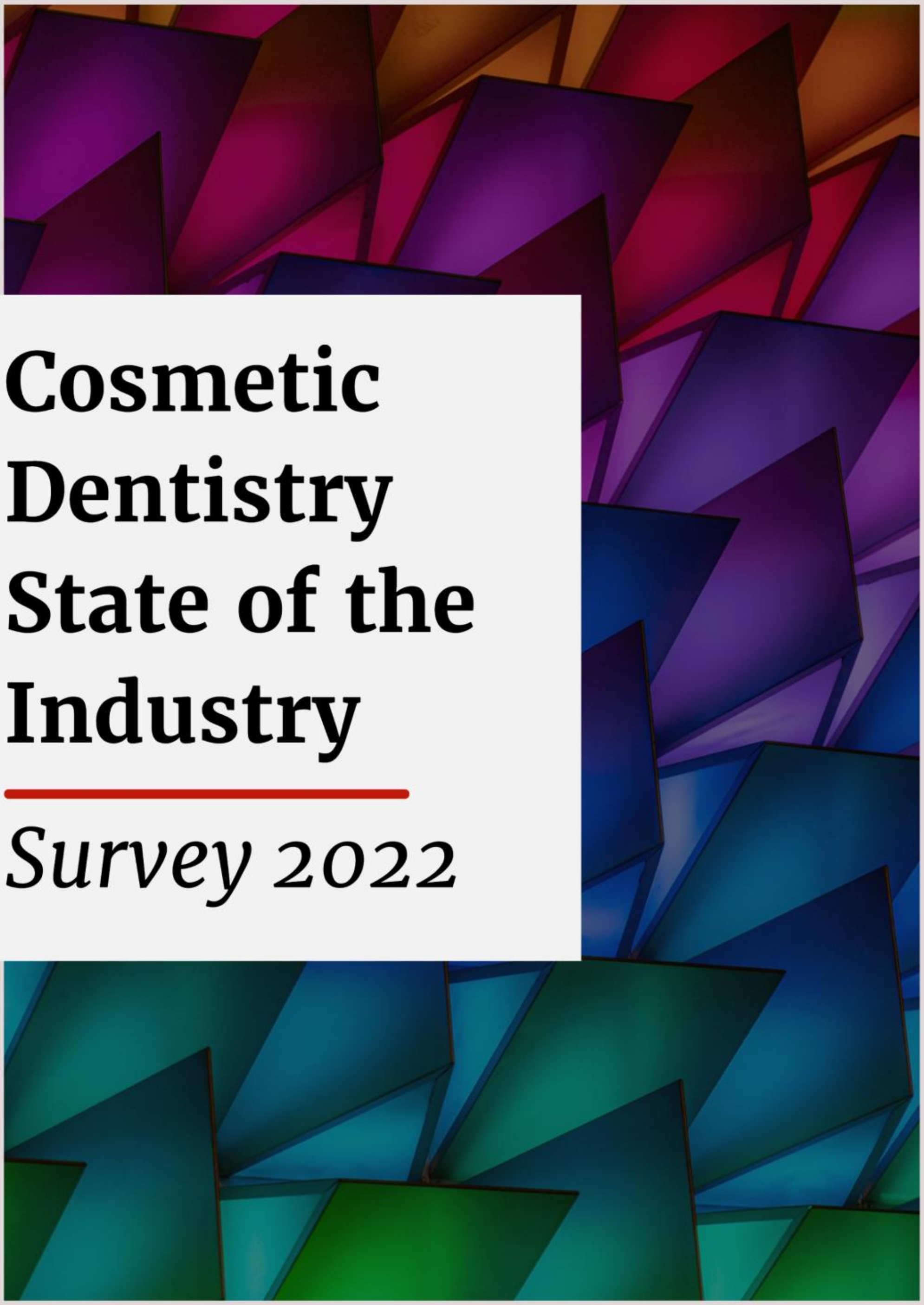
Conducted by the American Academy of Cosmetic Dentistry



Cosmetic Dentistry State of the Industry

Survey 2022

American Academy of Cosmetic Dentistry®

American Academy of Cosmetic Dentistry
www.AACD.com

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AACD Cosmetic Dentistry

2022 State of the Industry

About This Study

This single-mode survey (email driving to an online instrument) of dental practices was conducted by the American Academy of Cosmetic Dentistry (AACD) and Acuitim Marketing Research and Consultancy to better understand the dynamics of the cosmetic dentistry market and determine the size and impact—in terms of procedures and revenues—and the patient makeup of this market.

Previous benchmarking surveys were conducted in 2004, 2007, 2011, 2013, 2015, 2017, and 2019 by Levin Group, Inc., Readex Research, Acuitim Market Research, and AACD respectively. Data for the 2022 study was collected between August 1 and August 31, 2022. For consistency's sake questions related to revenues, pricing, and number of procedures collected data for the calendar year 2021. A total of 474 responses were tabulated, with fewer respondents completing the latter portion of the survey. *The net number of respondents is noted on each exhibit.*

The invitation to participate was primarily offered via email to the AACD membership at large, but also distributed to non-AACD member dental professionals via social media and dental media partners to provide an outside-in view of non-member dental practices that derive income from cosmetic procedures.

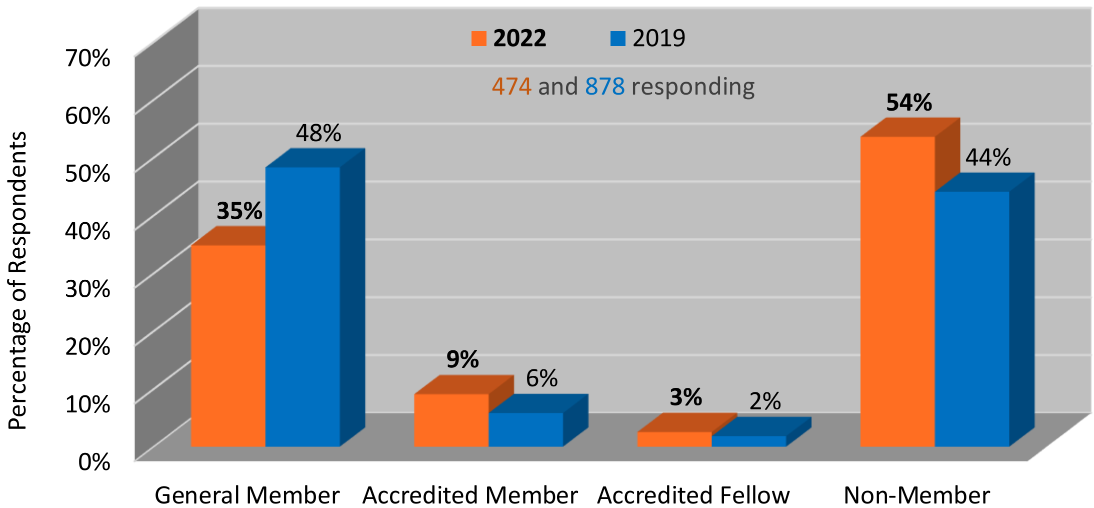
Cooperation with this survey was less than in 2019, when an incentive was offered, but is higher than previous years like due to increased distribution of invitations. Following is the number of surveys by member type in the last three surveys:

	2017	2019	2022
Total	363	878	474
General Member	211	424	165
Accredited Member/Fellow	73	67	55
Non-Member	79	387	254

Respondent Demographics

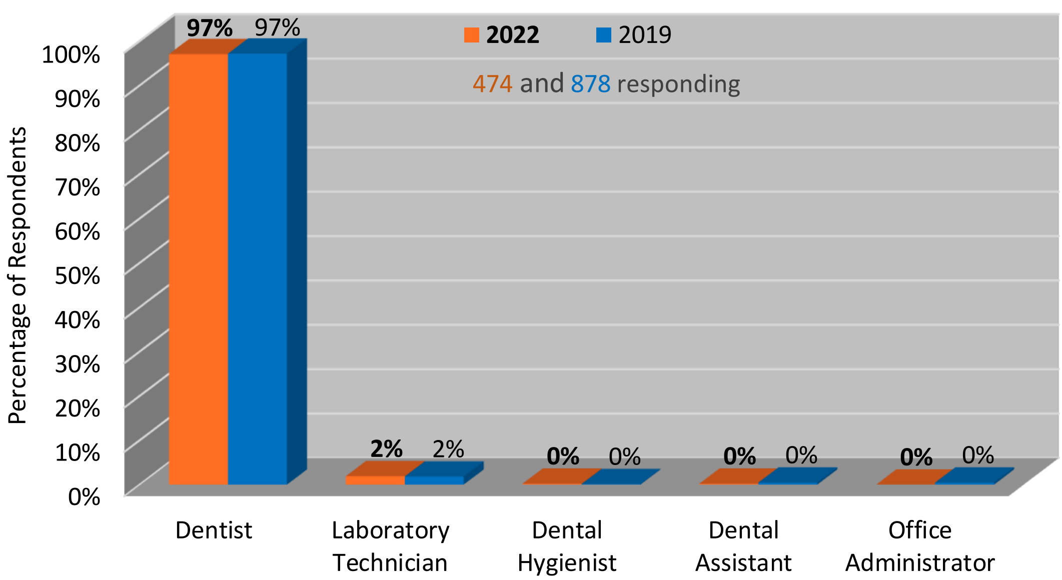
AACD Member vs. Non-Member

Over half of respondents (54%) were non-members which compares to 44% in 2019 (and much lower percentages before that). Distribution to non-members increased in 2022 and 2019 to obtain a statistically valid sample of both members and non-members. The actual number of surveys in 2022 was 220 members and 254 non-members. This provides 95% +/- 6.6% confidence for members and slightly better for non-members.



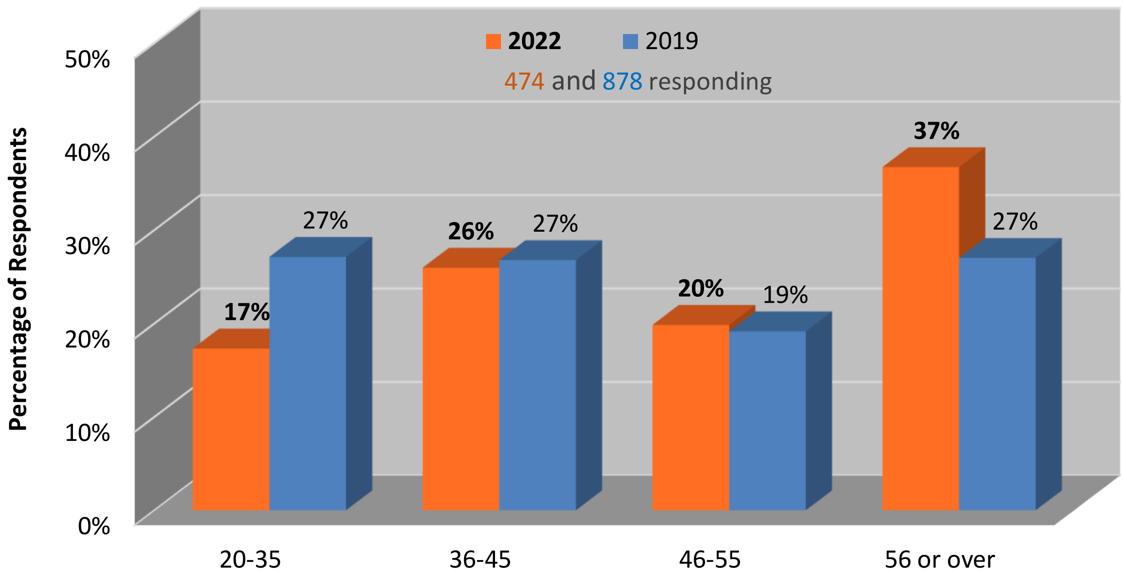
Dentists Dominated

Almost all respondents were dentists (97%), with lab technicians (2%) comprising most of the rest of the sample, which is identical to the 2019 sample.



A Question of Age

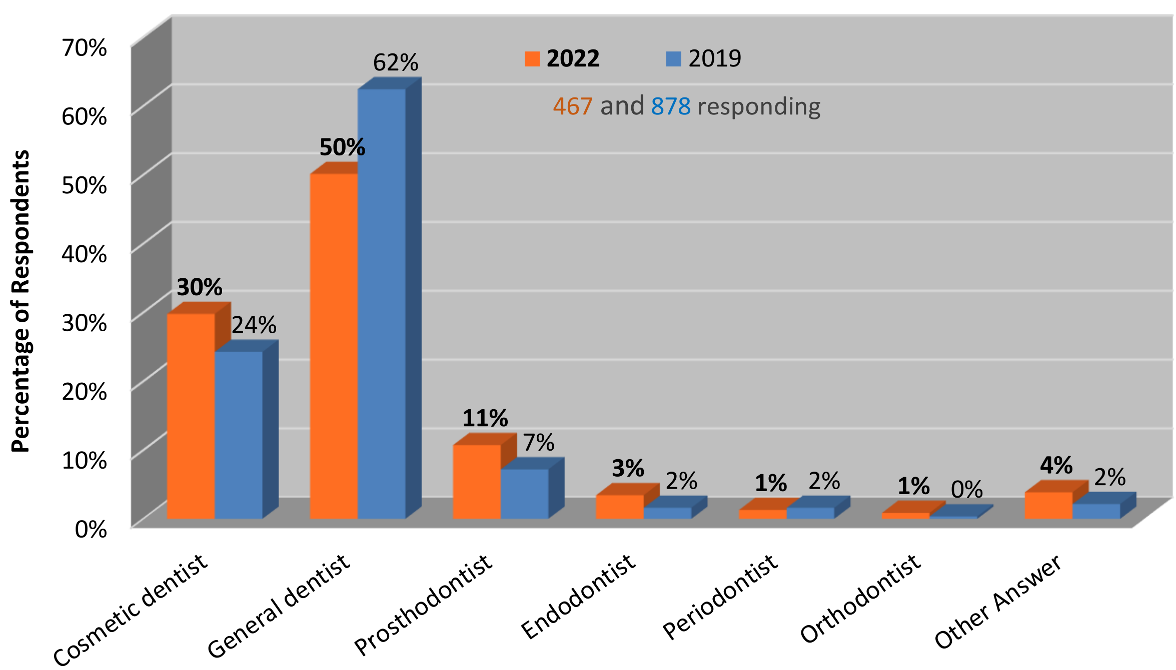
There are fewer respondents aged 35 and under (17%) compared to 2019 (27%). It is also notable that among AACD accredited members, 78% are 55 and over in 2022, which compares to 61% in 2019.



Community of Practice

Most respondents (80%) identified themselves as either general dentists or cosmetic dentists. Most accredited members are cosmetic dentists (67%) compared to only 20% of non-members.

Prosthodontist is a growing specialty among non-members, including 16% in 2022, 13% in 2019 and 9% in 2017. Among members, prosthodontists have made up between 2% and 4% of the sample during the same time frame.

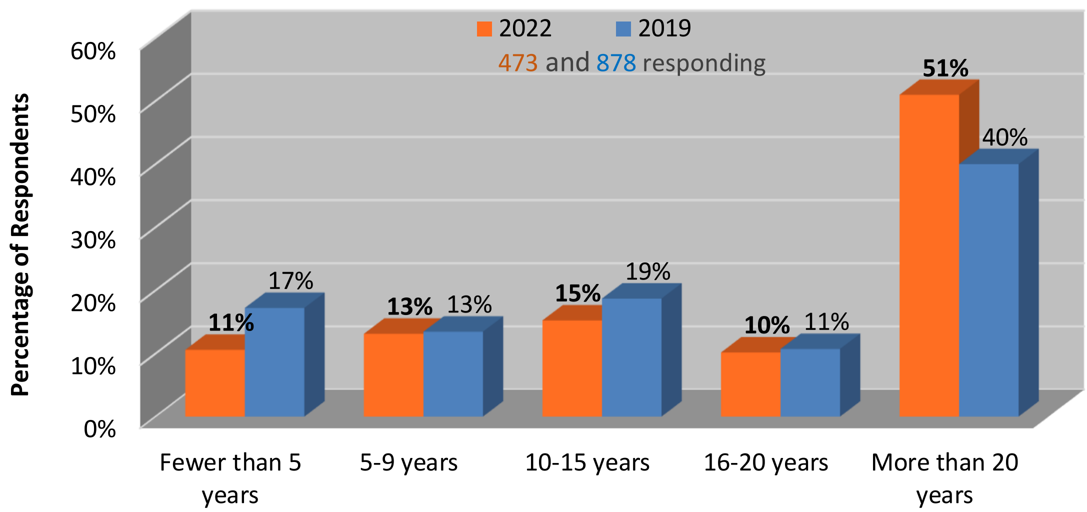


Practice Profile

Staying Power

How many years have you been in practice?

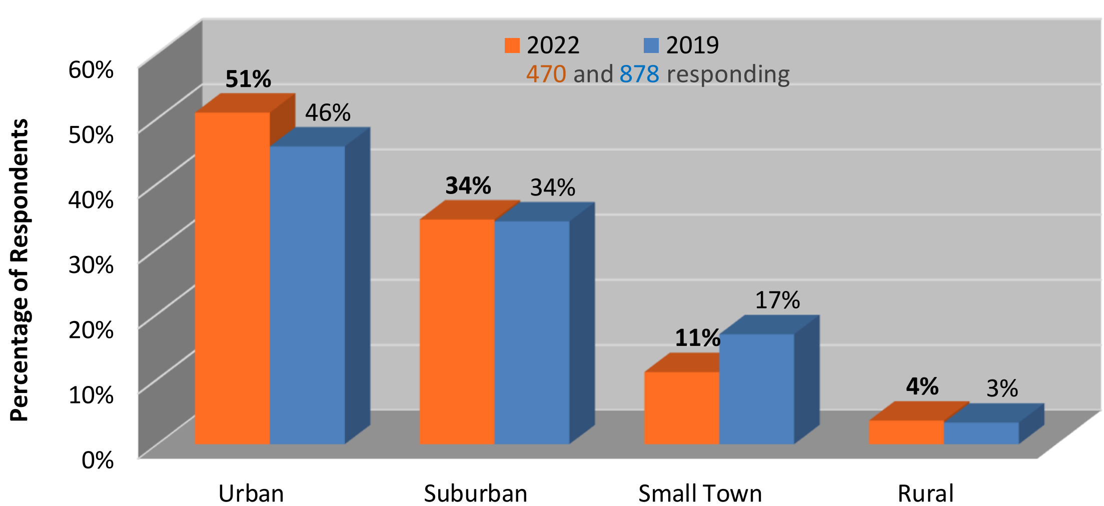
The percentage of respondents practicing 20 or more years is higher compared to 2019 but is similar to 2017 (52%) and 2015 (51%). However, 45% of non-members in practice 20 or more years is ten percentage points higher compared to recent studies. General members with less than 5 years in practice is down compared to recent studies (12% compared to 22% in 2019 and 20% in 2017).



Practice Location

In what type of community is your practice located?

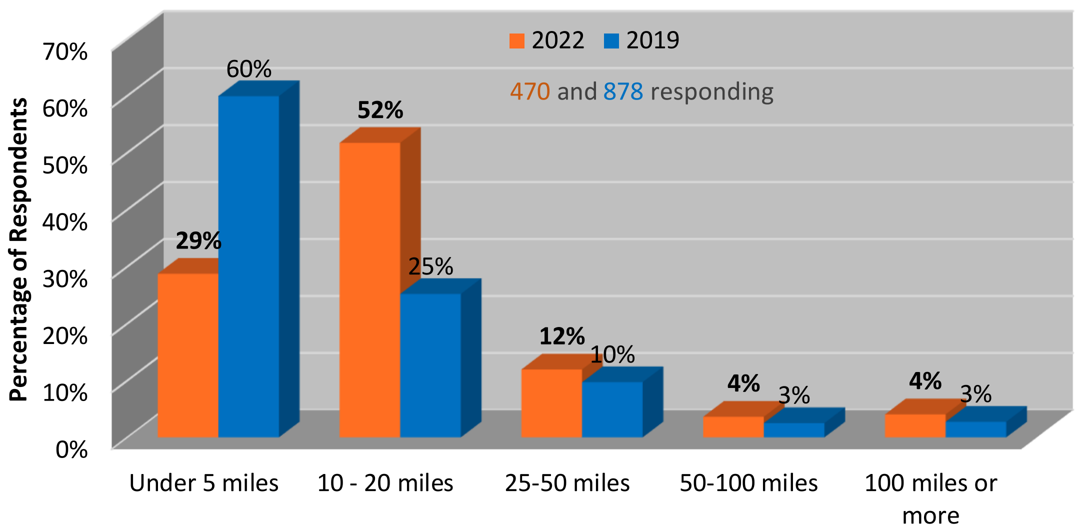
Practices continue to migrate to more urban environments. The percentage of practices in urban locations increased 11 percentage points since 2019 and a total of 32 percentage points in the last thirteen years. Meanwhile. Small town practices declined in 2022, particularly among General Members (9% compared to 17% in 2019) and non-members (12% compared to 18% in 2019).



Location or Expertise?

How far, on average, do patients travel to get to your practice?

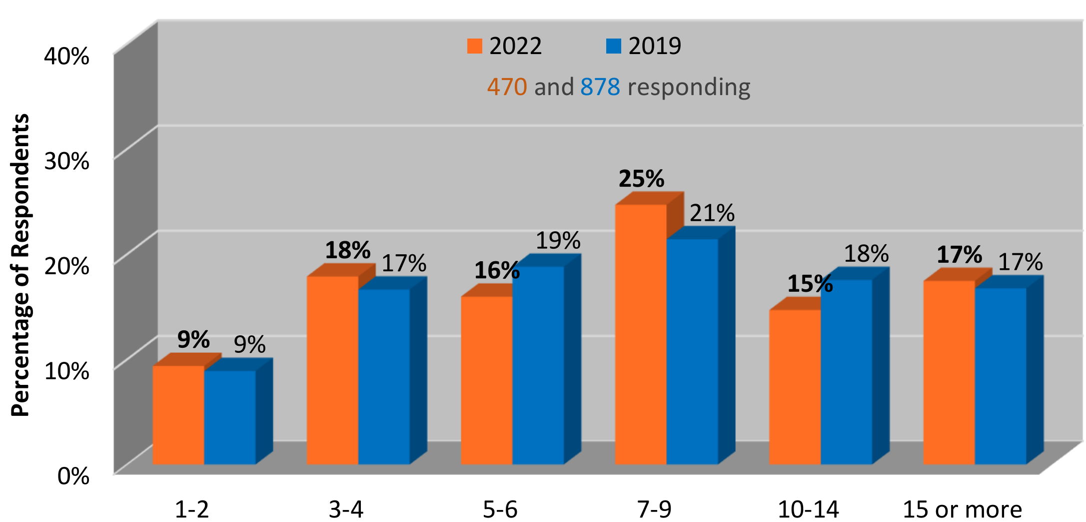
Half of respondents (52%) indicated their patients travel an average of 10 to 20 miles to get to the practice. While this appears to be a large shift, particularly with the increase in urban settings, it should be noted that in 2019 the first two answer options were 0 to 10 miles and 11 to 24 miles. The way respondents interpreted 6 to 10 miles in 2022 may have influenced the shift from the closer range to the larger distance range.



Head Count

What is the total number of employees working at your practice?

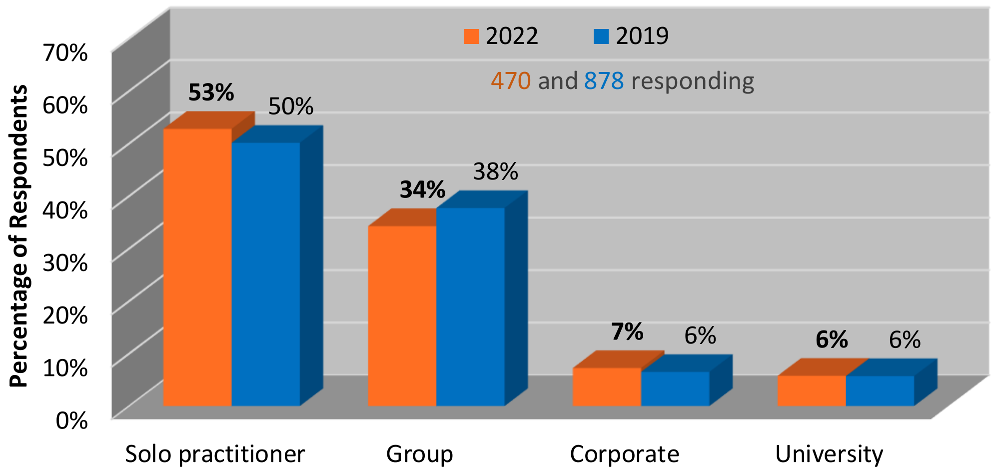
There was little change in the size of practices compared to 2019. The increase in practices with 7 to 9 employees was offset by slight decreases in practices with 5 to 6 or 10 to 14 employees. Non-members continue to be more likely to have 4 or fewer employees compared to members (35% to 20%, which is similar to 32% and 20% in 2019).



Going It Alone

What best describes your practice?

There are slightly more solo practitioners and slightly fewer respondents in group practices compared to 2019, with both trending slightly back toward 2017 levels. Accredited members continue their strong shift to solo practices, with 71% in 2022, up from 63% in 2019 and 54% in 2017. Meanwhile, General member practices were unchanged with 36% group practice in both 2022 and 2019 and 55% solo practitioners in 2022 compared to 54% in 2019.



Scope of Practice

In the past year, which of the following procedures has your practice completed?*

The percentage of practices performing each procedure is generally the same as or slightly lower than in 2019. The exceptions are orthodontics, which declined among all member types, and veneers, which increased by two points overall and six points among non-members.

The slight decline among several procedures is mostly due to fewer member practices performing them. Out of eleven procedures prompted in the question, the average member indicated their practice performed 8.1, which is down from 8.7 in 2019. Meanwhile, non-members number of procedures increased only slightly, from 7.6 in 2019 to 7.7 in 2022.

Procedure	2022	2019
Crown and bridge work	94%	97%
Direct bonding: Anterior	89%	93%
Bleaching or whitening	87%	88%
Veneers	83%	81%
Direct bonding: Posterior	82%	87%
Removable prosthetics	78%	83%
Implants	73%	77%
Inlays or onlays	62%	62%
Other cosmetic dental procedures	56%	56%
Invisilign or other tray aligners	53%	56%
Orthodontics	29%	41%

472 and 878 responding

* In 2022, this question specified the 2021 calendar year

Specialties

Looking at the following procedures/treatments that you currently complete in your practice, which one would you like to see more of?

This question changed compared to previous years when it allowed multiple responses and asked which procedures the respondent performed and would like to see more of. Response to that question looked very much like the response to the earlier question asking which procedures the practice performs.

This version of the question is more direct and the results are certainly clear with veneers (39%) easily the procedure most often indicated, followed by implants (18%) and implant-supported dentures (9%).

Increasing veneers is the clear preference among Accredited members (60%) and General members (46%), while non-members are more likely than members to indicate implants (21%), implant-supported dentures (11%), or bonding (10%).

Procedure	Total	General Member	Accredited Member	Non-Member
Veneers	39%	46%	60%	30%
Implants	18%	14%	15%	21%
Implant-supported dentures	9%	9%	5%	11%
Crowns	8%	9%	7%	8%
Bonding	7%	4%	4%	10%
Invisilign or other tray aligners	5%	7%	0%	5%
Periodontal plastic surgery	2%	2%	0%	3%
Bridges	2%	1%	0%	3%
Short-term ortho	1%	2%	0%	1%
Long-term ortho	1%	1%	0%	1%
Recontouring	1%	1%	0%	1%
Bleaching or whitening	0%	0%	2%	0%
Microabrasion	0%	0%	0%	1%
Dentures	0%	0%	0%	0%

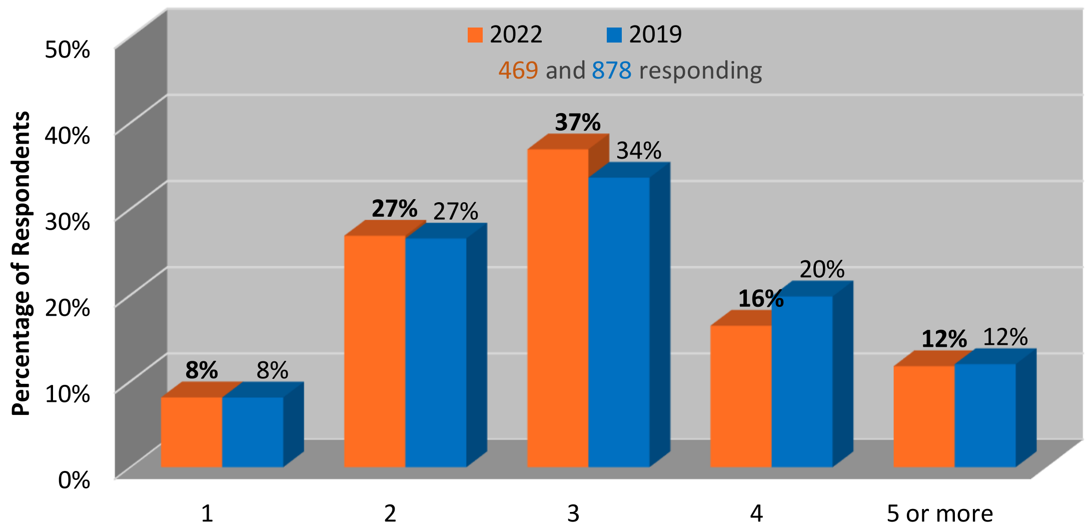
472 responding in 2022

Let's Talk Labs

Lab Loyalty

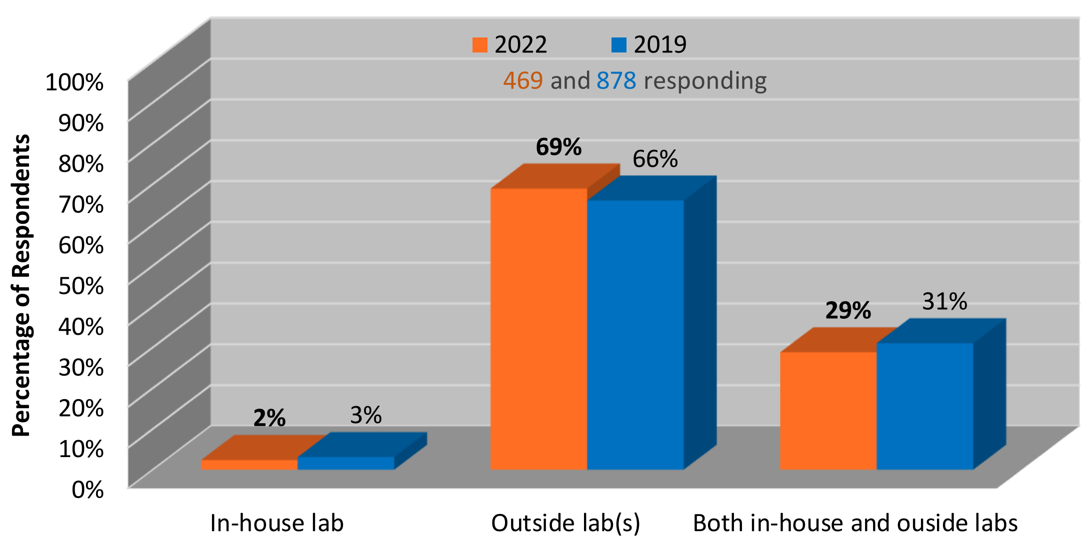
How many different dental laboratories does your practice patronize?

The number of labs used is little changed compared to 2019. The slight shift away from 4 labs to 3 labs is based on non-members whose use of 4 labs is down to 11% compared to 19% in 2019, with an increase in using 3 labs from 31% to 37%. Members continue to use 4 or more labs (38%) nearly twice as often as non-members (20%), but the difference between General members and Accredited members is less pronounced than in the past.



Use of In-house and Outside labs

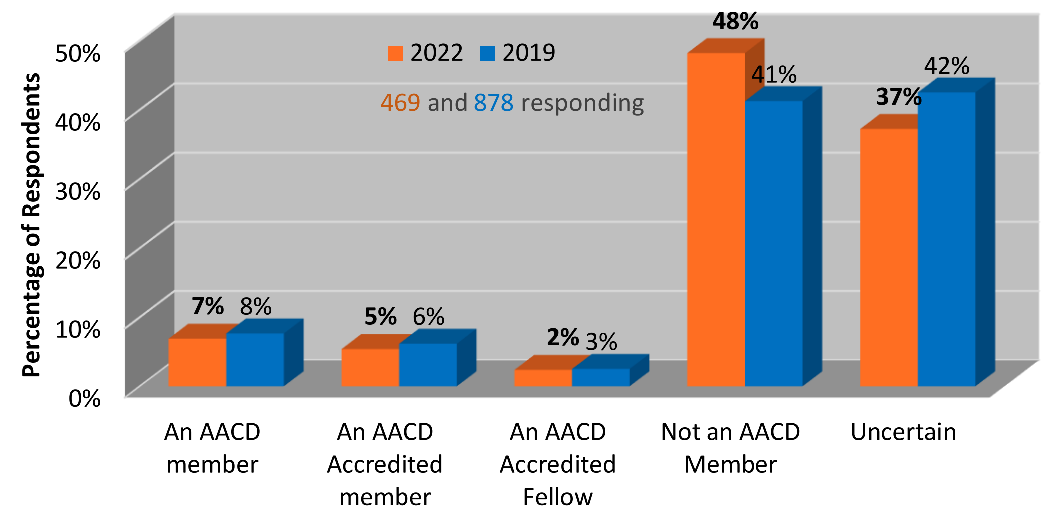
Compared to 2022, slightly fewer respondents are using in-house labs (31% "in-house" or "both" compared to 34% in 2019). This is mostly among members with non-members use of in-house labs down only one percentage point. Use of in-house labs by group practices is down from 37% in 2019 to 31% in 2022, with solo practitioners also slightly lower, down from 28% to 25%.



AACD Labs

Is your primary laboratory technician a member?

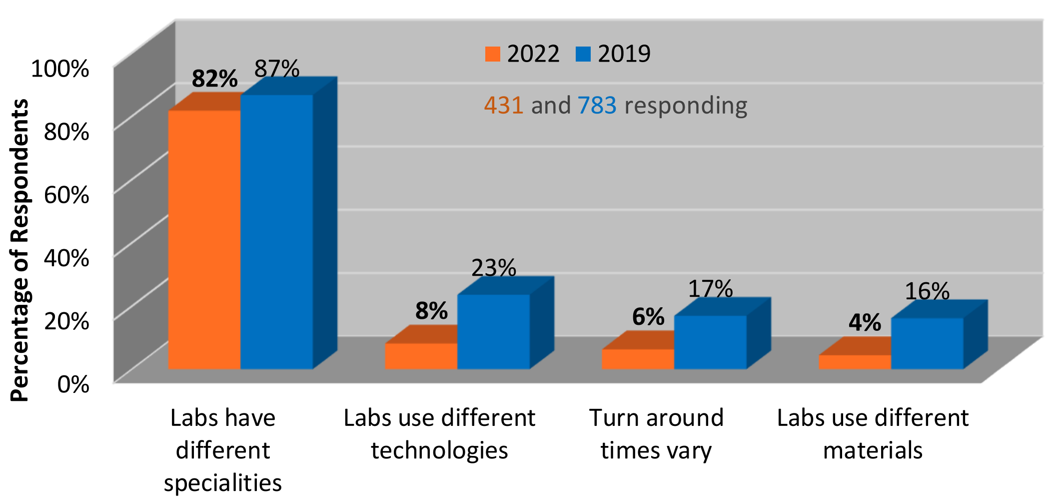
Most Accredited members continue to identify their primary lab technician as an AACD member (55%). Fewer general members (17%) and very few non-members (2%) say their tech is an AACD member with many saying they don't know (42% of non-members and 40% of general members). It is notable that slightly fewer respondents in all member types indicate their lab tech is a member and more are certain the lab tech is not a member.



Selection Factors?

Why do you use more than one laboratory?

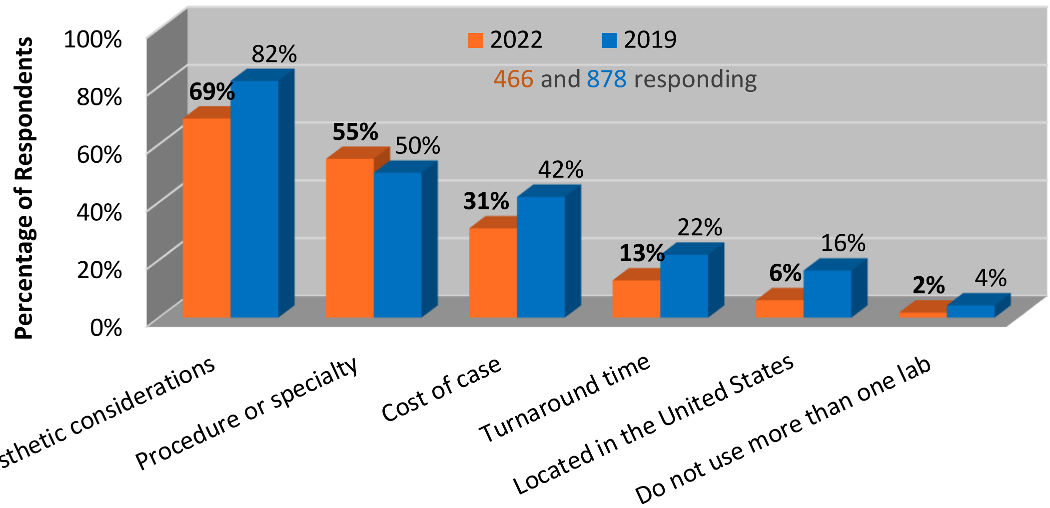
This question allowed one response in 2022 and multiple responses in previous years. Despite this, nearly as many respondents indicated differing specialties (82%). Different technologies (8%), turnaround times (6%) and different materials (4%) also remain in the same rank order. Non-members are the least likely to indicate specialties (78%) and indicate technologies (10%) more than members.



Decisions, Decisions

When deciding which lab to use, what are your primary considerations?

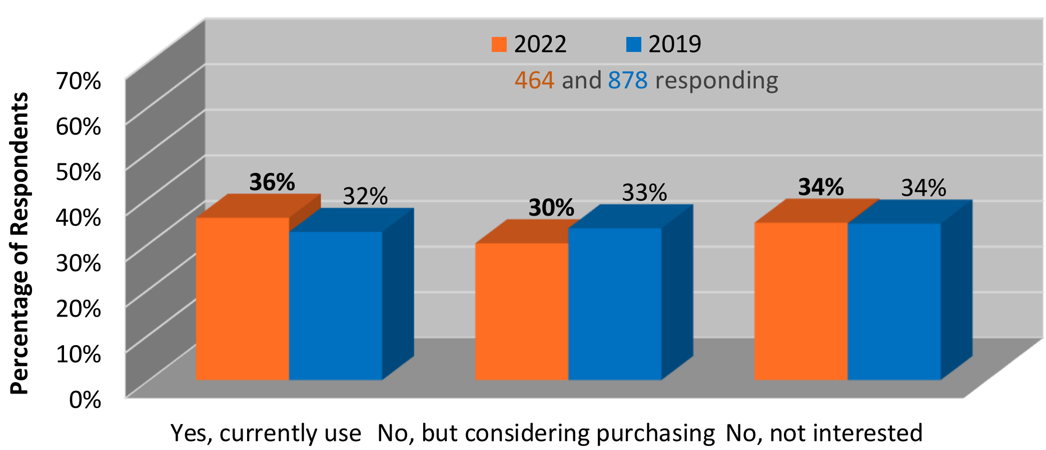
While Esthetic considerations remained the top reason for selecting a lab (69%), fewer dentists of all member types selected this as a primary consideration . Procedure or specialty is the only consideration that increased compared to 2019, with Accredited members (up 14 percentage points) increasing more than General members (+5 points) or non-members (+3 points). Labs located in the United States are also less preferred, with a particularly decline among all members (down from 19% to 5%).



In-Office Technology

Does your practice use a chairside CAD/CAM system?

Use of a chairside CAD/CAM has increased steadily since 2017, though changes in the proportion of non-members make it appear to have fluctuated. Among members (General and Accredited combined), use of chairside CAD/CAM increased slowly, from 37% in 2017 to 39% in 2019 and 40% in 2022. Among non-members usage increased from 24% in 2017 to 25% in 2019 and 31% in 2022. Use of a CAD/CAM system continues to increase in step with the size of the practice. It is also worth noting that the percentage of respondents who are not interested in using CAD/CAM has remained steady at 34% in 2017, 2019 and 2022, with increases in those using it offset by decreases in those willing to.

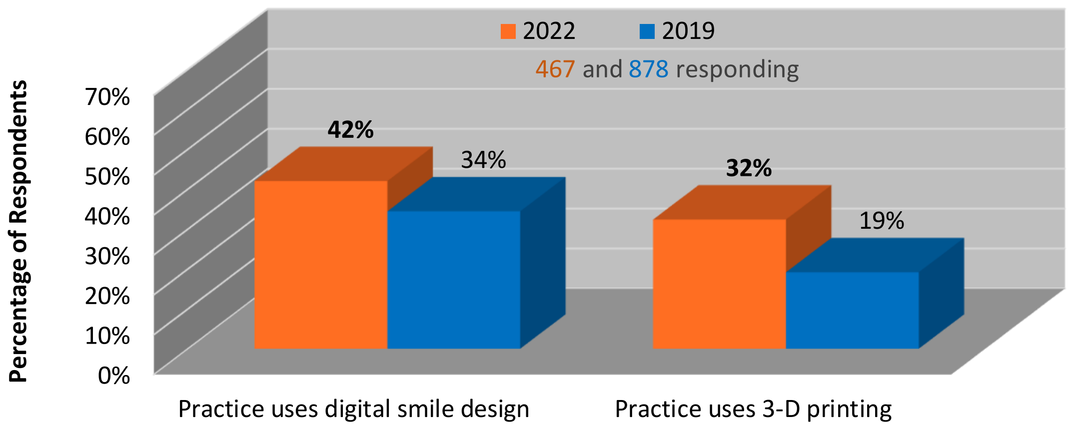


Use of Digital Smile Design and 3-D Printing

Does your practice use a computer program for digital smile design or previews?

Does your practice use 3-D printing?

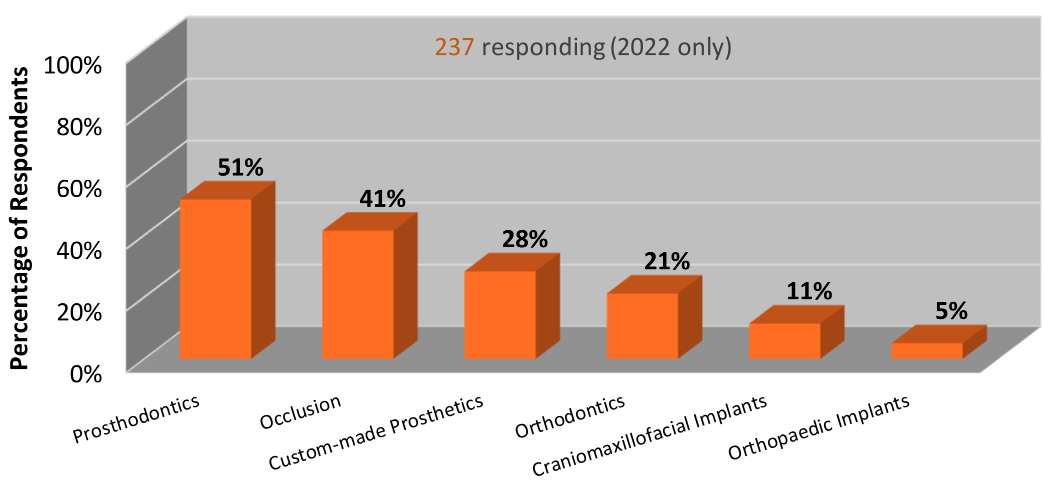
Use of both digital smile design and 3-D printing increased compared to 2019, with four in ten (42%) using digital smile design and one-third (32%) of practices using 3-D printing. Use of both technologies increased among all member types but more among AACD members, with digital smile design increasing 11 percentage points (to 49%) and 3-D printing increasing 17 points (to 38%) among members. Use of these technologies has grown more among group practices than among solo practitioners.



3-D Printing Uses

If your company uses 3D printing, what does your practice use it for?

In a question added in 2022, respondents were asked what their practice uses 3D printing for. 3D printers are used for prosthodontics (51%) and occlusion (41%) the most. Use for orthodontics (21%) is also notable considering that only 29% or respondents indicated their practice performs orthodontics. There is little difference by member type or other factors, with the largest gap being for occlusion (members 44% to non-members 39%) and custom-made prosthetics (members 31% to non-members 26%).



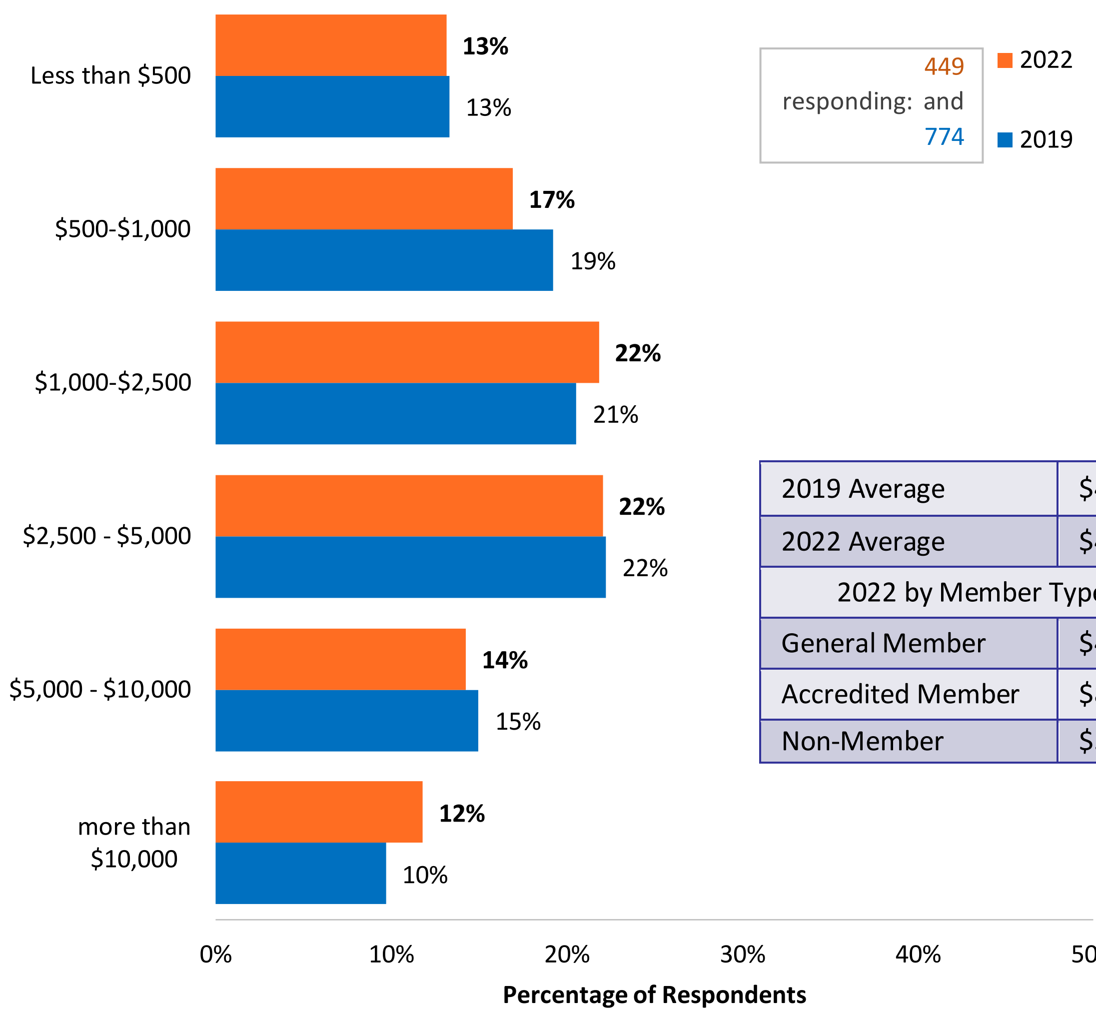
Dollars and Sense

Big Spenders

In the last year, how much did your average patient spend on cosmetic dentistry services?*

The increase in average spend is largely a result of accredited members, where average patient spend of more than $10,000 increased from 22% in 2019 to 30% in 2022. It should be noted that this remains below 2017, when 36% of accredited members reported average patient spend of over $10,000.

Average patient spend also increased slightly among general members ($4,891 is up from $4,625 in 2019) and non-members ($3,708 is up from $3,482 in 2019). The increase in overall average was curtailed by an increase in the non-member portion of the sample (53%, up from 43% in 2019).



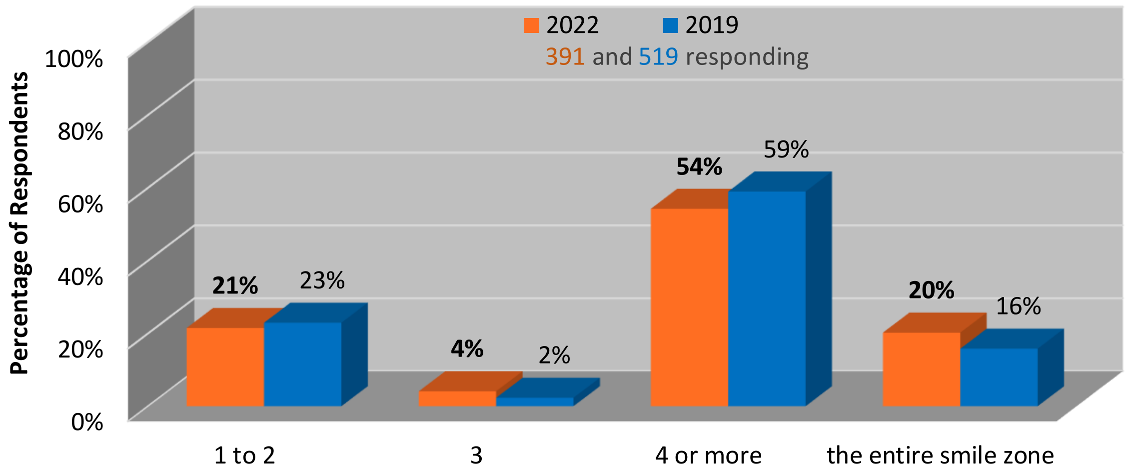
2019 Average	$4,336
2022 Average	$4,680
2022 by Member Type	
General Member	$4,891
Accredited Member	$8,420
Non-Member	$3,708

* In 2022, this question specified the 2021 calendar year

Frequency and Revenues for Top Cosmetic Procedures

*On average, how many veneers do patients receive at once?**

As in 2019, three-quarters (74%) of respondents said they averaged either 4+ or the entire smile zone. Accredited members (38%) are the most likely to say they do the entire smile zone. Dentists under 35 years old (44%) and those at small practices with under 5 staff members (36%) often say they do 1 to 2. In addition to Accredited members (4%), respondents who use Digital Smile design (12%) and those identifying themselves as Cosmetic dentists (8%)are the least likely to perform 1 to 2 veneers at a time.

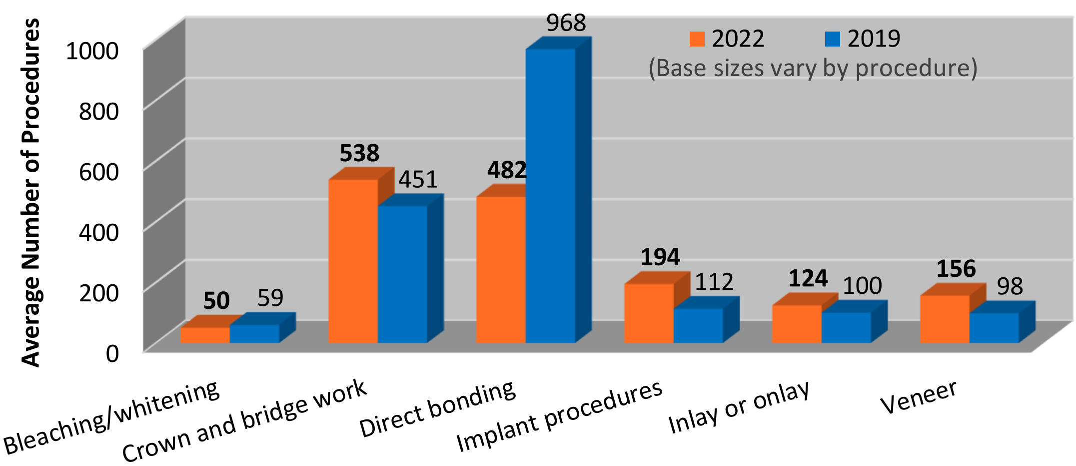


* In 2022, this question specified the 2021 calendar year

What's Popular?

Please report the approximate number of (each of the following) procedures your practice (including all associates) performed in the last year.*

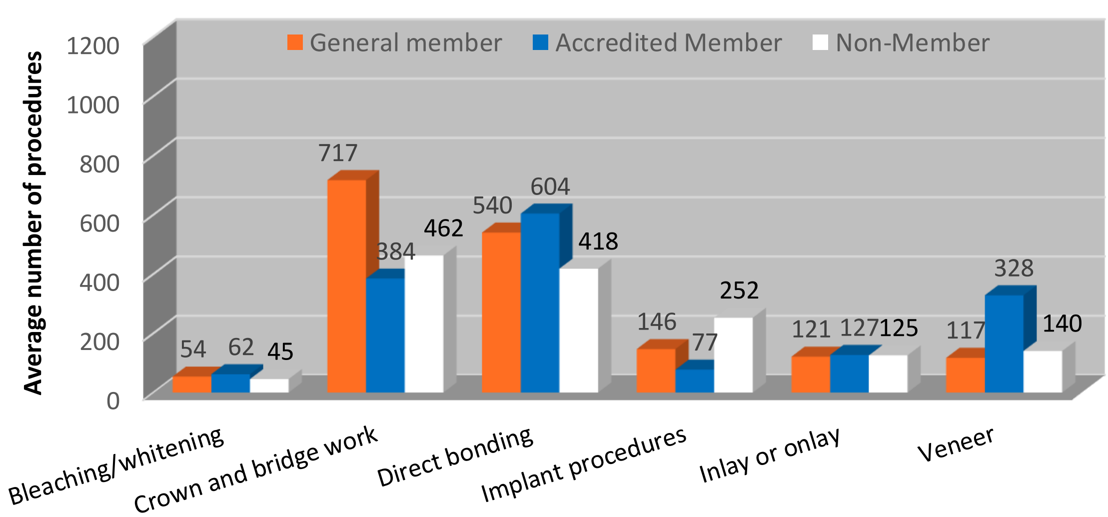
Direct bonding procedures reduced by half compared to 2019, with the decline fairly consistent is among all member types. Meanwhile, implant procedures more than doubled among non-members, veneers tripled among accredited members, and inlays or onlays also doubled among accredited members. The number of crown and bridge procedure increased by approximately 40% among general members and non-members while decreasing more than 30% among accredited members.



Who Patients Choose

The average number of procedures reported by member type

Compared to 2019, Accredited members reported more veneer procedures (+107) but far fewer crown and bridge (-305) and direct bonding (-143) procedures, as well as slight declines for other procedures leading to an overall average of 67 fewer procedures per practice. Meanwhile, General members reported a large increase in crown and bridge work (+365). Non-members performed the most implants, with an increase of 154 per practice compared to 2019.

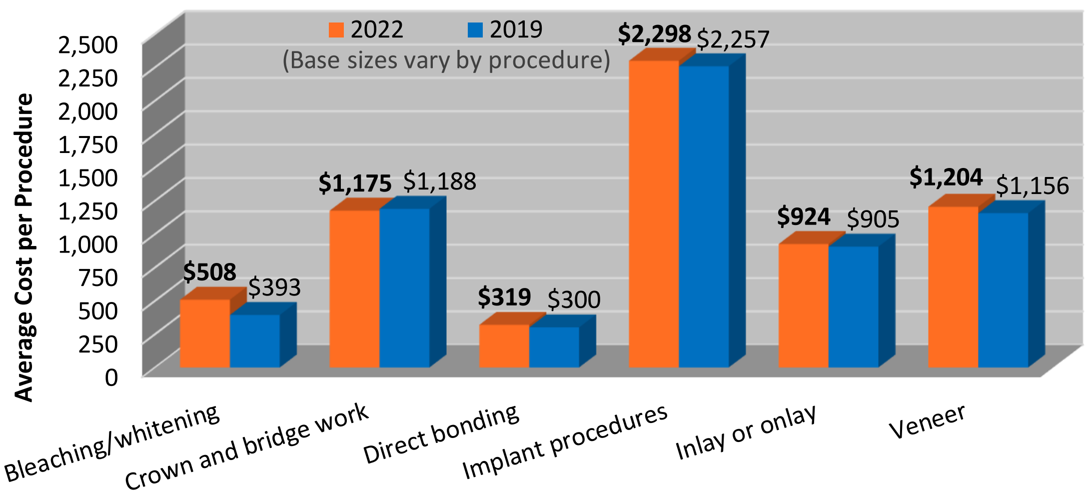


* In 2022, these questions specified the 2021 calendar year

What's Profitable?

What is the average cost of a (each of the following) procedure in your practice?

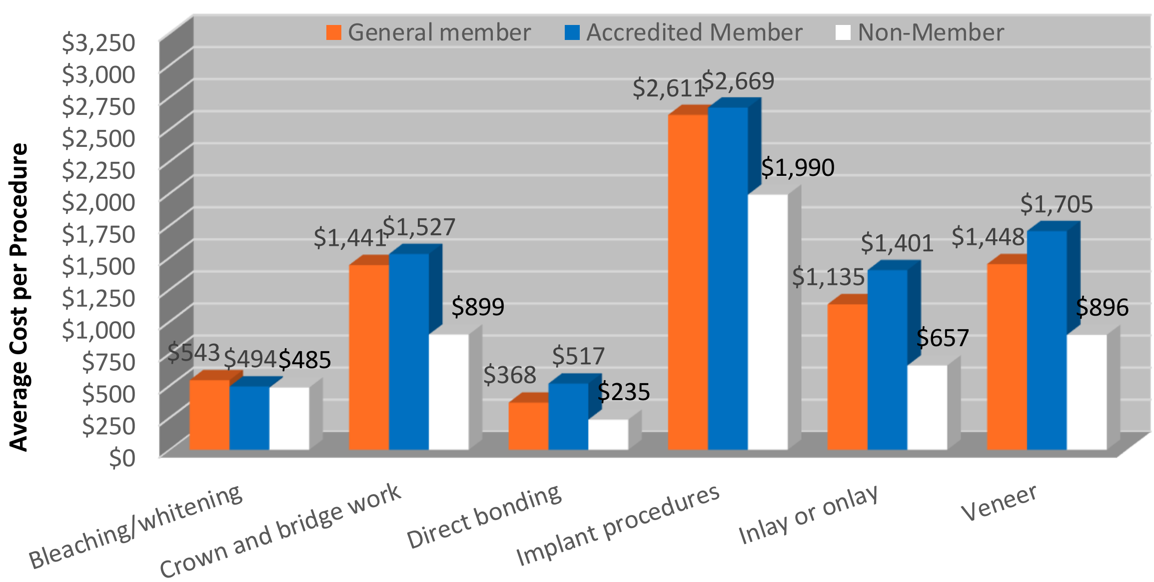
The average cost of most procedures is slightly higher compared to 2019, with the apparent decline in crown and bridge work resulting from the increase in proportion of non-members. Every member type had its largest percentage increase for whitening procedures. Among the other five procedures tested, general member reported price increases over 10% each, with an averaging increase of $200. Meanwhile, other prices reported by member type changed by less than 10% except for a 17% increase in implants among non-members.



And What They Are Willing to Pay

The average cost per procedures reported by member type

Accredited members report the highest cost per procedure for all procedure types except bleaching/whitening. General members continue to report higher cost per procedure than non-members for all procedure types, with non-members' prices averaging 40% lower for most procedures.

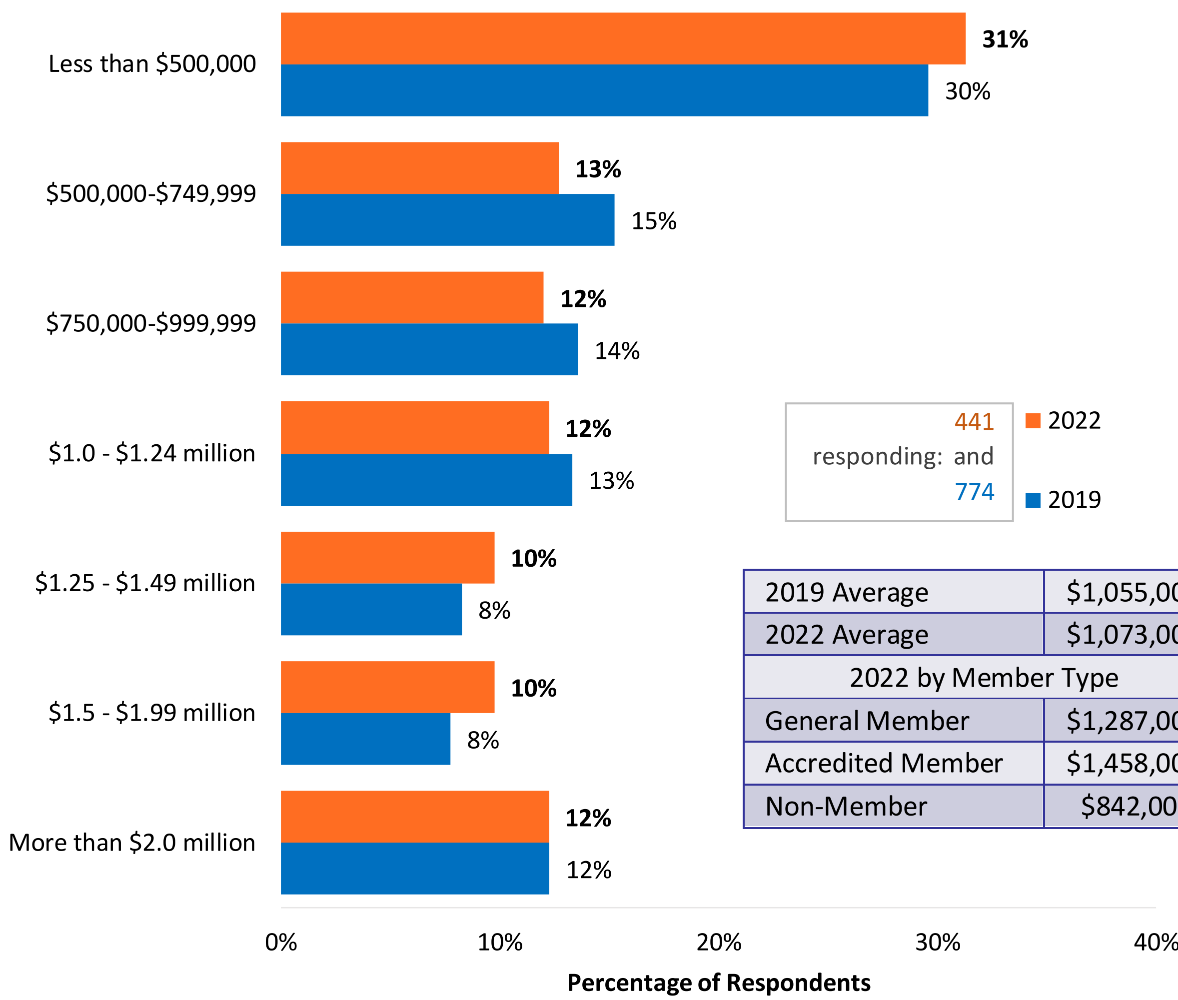


Show Me the Money

Please indicate the total revenues for all dentistry procedures (both cosmetic and non-cosmetic) that your practice performed in the previous year.*

There is very little change in the overall average revenue per practice ($1,073K) compared to 2019 ($1,055K) or 2017 ($1,081K), with the increase in sample size for non-members (53% in 2022 compared to 43% in 2019 and 18% in 2017) lowering the overall average.

Likely due to the increase in accredited members who report their age as 65 or over (47% in 2022 compared to 18% in 2019 and 27% in 2017), accredited members are going through a revenue decline ($1,458K in 2022 is down from $1,593K in 2019 and $1,603K in 2017). Some accredited members may be ramping down their practices, which is also supported by 56% whose practice is planning a transition due to retirement and 71% identifying theirs as a solo practice. General members and non-members continue to show increases in overall practice revenues.



2019 Average	$1,055,000
2022 Average	$1,073,000
2022 by Member Type	
General Member	$1,287,000
Accredited Member	$1,458,000
Non-Member	$842,000

* In 2022, this question specified the 2021 calendar year

Market Trends

What do you see coming in the next five years for dental practices in terms of new technology, materials, or smile trends?

Expected 5-year trends are similar to what was reported in 2019. One inevitable change is that some of what was expected in 2019 had already occurred, with increases in use of CAD/CAM and 3D Printing mentioned earlier in this report. In 2022 respondents are specifying increasing digital imaging, most often for impressions (15%). While better materials and better smile design also remain as expected trends, Artificial Intelligence diagnosis and better implants are increasingly on the horizon in 2022.

Procedure	2022	2019
3D Printing/milling	24%	24%
More Digital & CAD/CAM	19%	32%
Digital imaging/impression	15%	0%
New/Better Materials	13%	12%
Better Smile design/biometric	12%	11%
Artificial Intelligence diagnosis	5%	3%
More Aligners	5%	2%
Better implants	5%	0%
More/Better Tech	3%	3%
Minimalist/patient centered treatment	3%	0%

300 and 380 responding

What might disrupt the dental industry in terms of changes in standards or the competitive environment in the next five years?

While growth of dental support organizations (DSOs) corporate dentistry remains the most often mentioned potential disruption to the dental industry (24%), it is also mentioned less often compared to 2019. However, corporate growth is mentioned as often among members (38%, compared to 39% in 2019), and far less among non-members (11% down from 25% in 2019). Disruptions to the economy (12%), and specific examples such as higher cost (8%) and support staff shortages (7%) increased compared to 2019, particularly among members, with comments about OTC and DIY products declining as concerns (3%, down from 13%) among all member types.

Procedure	2022	2019
More corporate/DSO	24%	34%
Economy	12%	6%
Insurance trends	11%	9%
Higher cost	8%	1%
Robotics/Artificial Intelligence	7%	4%
Fewer support staff	7%	0%
More Government and Insurance regulations	6%	9%
Digital	6%	2%
3D printing	4%	0%
Reduced qualifications	4%	6%
Pandemic/Infection	3%	0%
DIY / OTC / at home	3%	13%

304 and 316 responding

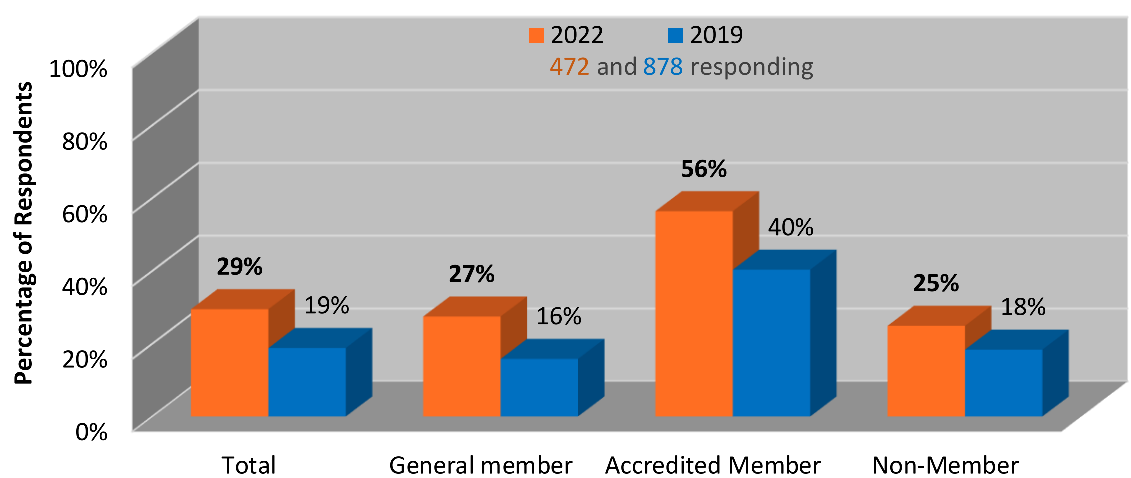
Potential industry disruptions discussed on the previous page often tie together in interesting concepts.

The following are representative of several ideas derived from comments.

- Covid drove many dentists into retirement due to age or their pre-existing risk factors.
- Increased access to third party digital smile previews may distort the patient's expectations as to what can be realistically delivered.
- There will be further increased adoption of intraoral scanners and better soft tissue impressions.
- Artificial Intelligence diagnostic aids, digital imaging, and 3D printing of stronger and more permanent materials will reduce total treatment times.
- Constant training is of the utmost importance for the dentists and dental technicians handling updated software and digital systems as well as new dental materials. There are not enough trained CDT/MDT and new training options are needed.
- DSOs sell elective dental procedures and there is movement to extract teeth that could be saved and replace them with restorations. Patient-centered care with less emphasis on specific procedures is needed to maintain patient respect and trust.
- It's very difficult for dentists to predict what will happen in 5 years. Technology and materials in use today could become obsolete or become the new standard. Also, the industry is ever changing, including profit-centered investors in DSOs and foreign manufacture of dental equipment.

Is your practice planning a transition due to retirement in the next 5 years?

Overall, three in ten expect a transition within the next 5 years. This is a significant increase compared to 2019. It is no surprise that respondents age 55 and over are more likely to expect a transition (57%). As mentioned earlier in this report, almost half of Accredited members (47%) are age 65 or over. As such, it is no surprise that so many (56%) expect a transition.



Executive Summary

General

- A total of 474 responses were tabulated, with fewer respondents completing the latter portion of the survey.
    - Forty-six percent of respondents were American Academy of Cosmetic Dentistry (AACD) members. (page 5)
- Previous benchmarking surveys were conducted in 2004, 2007, 2011, 2013, 2015, 2017, and 2019. Comparisons to 2019 results are shown in this report wherever applicable, with 2017 results referenced to demonstrate some trends.
    - The percentage of non-members increased in the 2019 and 2022 surveys. This report notes and clarifies wherever the increase in non-member participation influences year-to-year comparison and focuses on member and non-member trends, where applicable.

Cosmetic Dental Practice Demographics

- Eighty percent of respondents identified themselves as either a general or cosmetic dentist. (page 6)
- Thirty-seven percent of respondents are age 56 or over. This includes 78% of AACD Accredited members/fellows. (page 6)
- Fifty-one percent of practices report having been in operation for 20 years or more. (page 7)
- Urban practices (51%) now represent half of all practices. This has increased by 26 percentage points in the past sixteen years. Small town and rural practices are down to 15% of the sample. (page 7)
- Twenty-nine percent of respondents say that their patients travel under 5 miles to get to the practice. (page 8)
- One-third (32%) indicate their practices has 10 or more employees. This is slightly lower than 2019 and similar to 2017. (page 8)
- Half of respondents indicate that they work in a solo practice environment (53%), with thirty-four percent claiming affiliation with a group practice. This represents a slight shift away from group practices and is against the previous trend. (page 9)
- Almost all practices perform crown and bridge work (94%), with nearly nine in ten performing direct bonding as well as beaching and whitening. Veneers (83%) is the only procedure indicated by more practices compared to 2019 (81%), with orthodontics as the only procedure mentions significantly less (29%, down from 41%). (page 9)
- Four in ten (39%) of respondents indicated they would like to see more veneers (87%). Implants (18%) and implant supported dentures (9%) are the next most desired procedures, followed by Crowns (8%) and bonding (7%). (page 10)

Cosmetic Dental Labs, Materials, and Technology

- Two-thirds (65%) use three or more labs, which is the same as in 2019. There was a slight increase in practices (37%, up from 34%). using three labs and a corresponding decrease in practices using four labs (16%, down from 20%). (page 11)
- Most practices using more than one lab do so because labs have different specialties (82%). (page 12)
- Three in ten practices (31%) have an in-house lab with almost all (98%) also using at least one outside lab. (page 11)
- Over half of Accredited members (55%) continue to identify their primary lab technician as an AACD member. This compares to only 17% among General members and 2% among non-members with four in ten among these groups uncertain. (page 12)
- "Esthetic considerations" remains the top decision factor (69%) in selecting which dental laboratory to use, with "procedure or specialty" (55%) increasing in importance. (page 13)
- Slightly more practices are using a chairside CAD/CAM system (36%, compared to 32% in 2019. There was a corresponding decrease in the percentage considering purchasing one, with those not interested unchanged at 34%. (page 13)
- Use of digital smile design (42%, up from 34% in 2019) and 3-D printing (32%, up from 19% in 2019) increased significantly. These increases were larger among members and group practices. (page 14)
- 3D printing is used mostly for prosthodontics (51%) and occlusion (41%). Two in ten (21%) indicated using 3D printing for orthodontics, which is notable considering that only 29% or respondents indicated their practice performs orthodontics. (page14)

Cosmetic Dentistry in Dollars and Cents

The increase in surveys among non-members affected overall results for patient spend, overall revenues, and cost of different procedures. As such averages by member types are discussed.

- The amount the average cosmetic dentistry patient spent on services at respondents' practices in the past year* is slightly higher among non-members (average $3,708, up from $3,482 in 2019) and General members ($4,891, up from $4,645) while increasing significantly for Accredited members by $1,200 compared to 2019 (average $8,420). (page 15)

  * In 2022, this question specified the 2021 calendar year
- Respondents reported half as many direct bonding procedures (482) compared to 2019. This is consistent across all member types. The number of whitening procedures declined slightly with increases compared to 2019 for implant procedures (73% more) , veneers (60% more), inlays/onlays (24% more) and crown or bridge work (19% more). (page 17)
- On average, Accredited members perform the most direct bonding procedures and veneers, with General members performing more crown and bridge procedures and non-members doing more implants. (page 17)

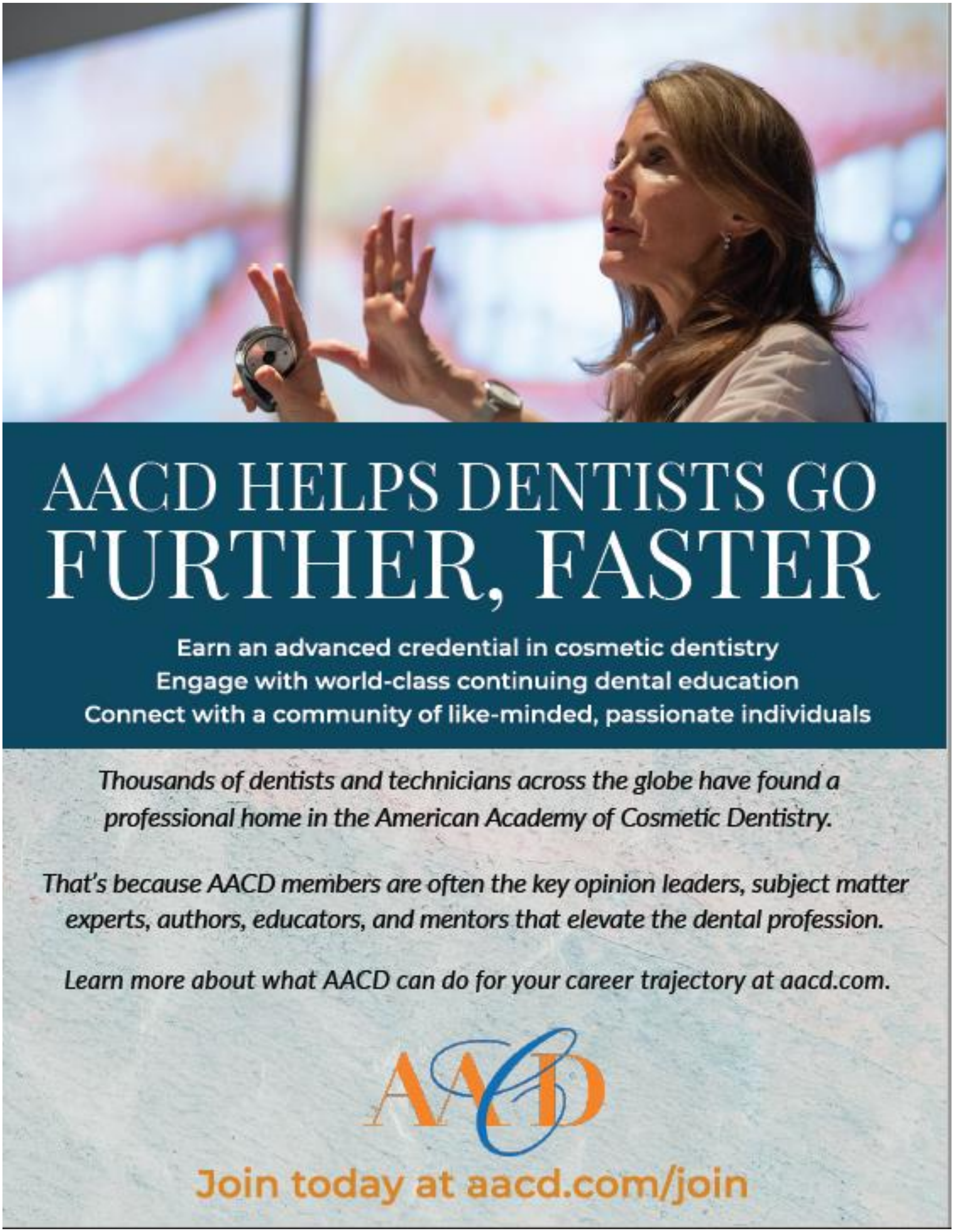
- The average cost per whitening procedure increased by 29%, with the cost of other procedures similar to 2019. (page 18)
- AACD General members reported increases of at least 10% for all other procedures, with Accredited member and non-member averages little changed. (page 18)
- Non-members continue to report the lowest average prices for all procedures and Accredited members the highest, with the exception of whitening. (page 18)
- Compared to 2019, average total revenues increased by 8% among General members and 4% among non-members but decreased by 9% among Accredited members. (page 19)
    - Accredited members continue to report the highest average total revenues ($1,458,000) and non-members the lowest ($842,000). (page 19)

Advantages Enjoyed by Members

- Members charge more for the same procedures. (page 18)
    - Accredited members report the highest average cost per procedure (except for whitening) and General members reporting higher cost than non-members.
- Members are performing less invasive procedures. (page 17)
    - Accredited members are performing mostly direct bonding procedures and veneers.
    - General members are performing the most crown and bridge procedures.
    - Non-member practices are performing the most implant procedures
- Members utilize more advanced technology. (page 23)
    - Members have a chairside CAD/CAM system (40%) more often than non-members (31%). (page 13)
        - Practices with a chairside CAD/CAM system have a higher average patient spend ($5,700 to $4,100) and higher total revenues ($1,249,000 to $979,000).
    - Members more likely to use digital smile design (49%) compared to non-members (36%) (page 14)
        - Practices using digital smile design have a higher average patient spend ($6,000 to $3,800) and higher total revenues ($1,147,000 to $1,020,000).
    - Members more have 3D printing capabilities (38% to 28%). (page 14)
        - Practices with 3D printing capabilities have a higher average patient spend ($5,700 to $4,100) and higher total revenues ($1,260,000 to $987,000).

Trends in Dentistry

- Twenty-nine percent of practices plan a transition due to retirement in the next five years. This is ten percentage points higher than in 2019 and includes more than half of Accredited members (56%). (page 21)
- One-quarter of respondents continue to expect more 3D printing or milling (24%). (page 20)
- While fewer dentists (19%) specified more CAD/CAM in the next five years, expected trends in digital technology also includes more imaging and digital dental impressions (15%). (page 20)
- AACD members (38%) remain much more concerned about growth of corporate dentistry than non-members (11%). (page 20)
    - Members are also more concerned about the economy (15%) than non-members (9%). (page 20)
- Respondents are also concerned about higher costs (8%) and availability of support staff (7%) more than in 2019. (page 20)
- OTC and DIY products are less of a concern then in 2019 (3%, down from 13%). This fear may have been assuaged after across-the-board price increases for whitening led to only a moderate decline in the number of procedures. (pages 17, 18 and 20)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