



CRITICAL TRENDS AFFECTING THE FUTURE OF DENTISTRY:

Assessing the Shifting Landscape

Prepared for American Dental Association

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EXECUTIVE SUMMARY

Dentistry in the United States is in a period of transformation. The population is aging and becoming more diverse. The health care delivery system is changing rapidly with the implementation of the Affordable Care Act. Consumer habits are shifting with Americans increasingly relying on technology and seeking greater value from their spending. The nature of oral disease and the financing of dental care are in a state of flux.

To assist the American Dental Association in its strategic planning, Diringer and Associates was retained in March 2013 to conduct an environmental scan of emerging trends that affect the future of dentistry. Consisting of a comprehensive literature review and key informant interviews, the scan found that:

PEOPLE

1. The population is getting older and more diverse, leading to different disease patterns, care-seeking behavior and ability to pay.
2. Consumers are becoming more astute purchasers of health care and seeking value for their spending.

PROVIDERS

3. An increasing number of dentists are being trained, but mounting debt load and changing demographics are altering the practice choices for new dentists.
4. Pressures are growing for an expanded dental team to provide preventive and restorative services.
5. Care is being integrated within “patient centered medical homes” in medicine but there has been slow take up of dental care services.

PAYMENTS

6. Payment for dental services is shifting from commercial dental insurance to public coverage and personal out of pocket payments.
7. Commercial dental plans are increasingly using more selective networks, demanding increased accountability through data and performance measures, and pressuring providers to reduce costs.

POLICIES

8. The Affordable Care Act pediatric dental benefit will provide millions of additional children with dental coverage through the small group and individual markets and optional Medicaid expansions.
9. Public programs, with a growing number of participants, will demand increased accountability from dental providers.

PRACTICE IMPLICATIONS

10. With the increased demand for value in dental care spending, practices will need to become more efficient.
11. The trend towards larger, multi-site practices will continue driven by dental plan pressures for smaller provider networks, practice patterns of new dentists and increased competition for patients.
12. Health care reform and Medicaid expansions with an increasing emphasis on outcomes and cost-effectiveness will encourage alternative models of dental care.

This is a critical moment in dentistry and not a time for complacency. Understanding the key forces at work will assist the profession in defining its own destiny. Ignoring what is happening in the health and consumer environments will mean ceding the future of the profession to others.

By commissioning this report and convening key thought leaders, the ADA has taken on the challenge of facing the new reality and charting a course for the dental profession and the oral health of America.

Diringer and Associates is a California based health policy consulting firm founded in 2001. It has significant experience in oral health, public policy, evaluation and organizational development. This report was authored by Joel Diringer, JD, MPH, Kathy Phipps, MPH, DrPH, and Becca Carsel, MA.