The Future of Dentistry…

…in the Eyes of a Data Wonk

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Today

• Analysis of key trends in the dental care market in Michigan and the U.S.
• Future changes coming to the dental care market
• New opportunities for dentists in tomorrow’s changing environment

The Dental Economy

Dental Care Utilization
Medicaid expansion under the Affordable Care Act increased dental care use among low-income adults by 3 to 6 percentage points.
The Big Picture

Commentary
James Edwards
Our dental care system is stuck
And here is what to do about it
Wash., D.C.

We will never see major expansions in dental care use and sustained improvements in oral health in the coming years, especially among those with the highest needs, under the status quo model. The dental care system needs major reforms.

Reform needed to achieve major expansions in dental care use and sustained improvements in oral health

- Address the Dental Coverage Gap
- Define and Systematically Measure Oral Health
- Fix Accountability Partly to Outcomes
- Before the Cure
- Delivery Model

Reconsider dental care a core essential health benefit for all ages, including children.

- Comprehensive dental care is necessary for health.
- The benefits of a oral health program can be maximized with this approach.
- Define and systematically measure oral health in ways that are meaningful and relevant for both patients and providers.

- Consider outcomes, not just what is done to patients.
- Make sure that providers of dental care are independent of oral health outcomes, not just the measure, so that providers ensure that outcomes are improved and are more within the direct control of providers.

- In case of a delivery plan, the cost of the oral care system to all people who receive care, that avoids scope of practice rules that are funded by fees for service payment.
Five Key Forces Reshaping Dentistry

1. The value agenda
2. Increased consumerism
3. Shifting dental care use patterns
4. Increased collaboration
5. Practice consolidation

The Value Agenda
The U.S. healthcare system is moving away from the provider-centric, fee-for-service, disease treatment model of care toward a patient-centric, value-based reimbursement, prevention and wellness model of care.

A View of the Changing Landscape

- Provider Centric
- Value-Based Reimbursement
- Episodes of Care
- Inpatient-Focused
- Disease and Treatment

- Patient Centric/Consumer
- Value
- Patient Flow
- Delivery Setting
- Objective

- Population-Based
- Discharge and Readmission
- Health/Wellness Prevention

Shifting Dental Care Use Patterns
Patient mix is shifting with increased demand for dental care services among children, seniors and low-income individuals covered by government-run healthcare programs.
Consumerism

Providers can expect to see increased consumerism in the coming years. Patients are treating health and dental insurance as they would other products, shopping for the plans that best address their specific health needs in the most cost-effective way.

Source: American Dental Association, 2018

Collaboration and Consolidation

The healthcare system is moving toward teams-based care with several specialties working together in settings such as accountable care organizations.

The dental sector will continue to see practice consolidation with fewer solo practices and more integration to large group practices with varying governance structures.
Collaboration and Consolidation

In a recent survey, 36% of health plan and dental plan respondents agree that convergence of medical and dental benefits will happen.

**Driving Forces**

- **40%** Convergence of Care
- **48%** Proximity and Convenience
- **75%** Better Technology

Opportunities

- Adapt to the shifting patient mix.
- Explore partnerships with different patient “touch points”.
- Tackle the convenience problem. The patient is in charge now.
- Get ready for the “value agenda” to hit dentistry.

"Skate to where the puck is going to be, not where it is."

Thank You!

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