

REVERSIBLE DECAY: ORAL HEALTH IS A PUBLIC HEALTH PROBLEM WE CAN SOLVE

Research Report

HIGHLIGHTS



- Six out of 10 (61%) U.S. adults rate oral health as **fair or poor**, and even more (67%) feel that it will either stay the same or get worse in the next 5 years.
- Half (51%) of **patients are concerned about their oral health, making it the top health concern** over heart, eye, digestive, mental, and skin health.
- **High costs and lack of coverage are significant barriers** to getting oral health care, and most Americans (52%) view the dental system as either scary, confusing, inconvenient or ineffective.
- Most dentists (98%) and physicians (96%) agree that access to **preventive dentistry is key for improving overall health**.
- Employers are interested in implementing **value-based care models** that prioritize healthy outcomes (51%).
- Most Americans support **Medicare dental (80%) and Medicaid dental (78%) coverage**.

EXECUTIVE SUMMARY

Oral Health Care: A Crisis

The Current U.S. Oral Health System is Failing, and Americans Aren't Getting the Care They Want and Need.

Oral health is the top health concern for Americans, and they consider it an important part of overall health. However, most oral health stakeholders—in this case patients, physicians and dentists, employers and Medicaid dental administrators—feel the current state of U.S. oral health is fair or poor, and they don't expect it to get better anytime soon.

Serious barriers to maintaining oral health keep people from receiving care as often as they think they should. In addition to being perceived as expensive, over half of patients find the oral health system scary, confusing, ineffective or inconvenient.

Americans Agree on Several Solutions to Improve the System—Starting with Prevention.

Patients, dentists, physicians, employers, and Medicaid dental administrators express overwhelming agreement that prevention in oral health care is key to improving health. There is also broad appeal among these stakeholders for a variety of other solutions, some of which include:

- starting with preventive oral health care,
- increasing medical-dental integration and collaboration,
- expanding access via non-traditional care delivery locations,
- improving dental coverage under public insurance programs, and
- developing payment models that prioritize healthy outcomes over volume of services.

Employers are interested in learning more about how these approaches can help employee benefits design.

Patients and dentists see the value in more closely integrating oral health care into overall health care. Medical and dental care providers agree

that more collaborative care leads to better health outcomes, greater efficiency and even cost savings.

Patients see the need for oral health to be a part of Medicare and Medicaid coverage, again demonstrating widespread desire for greater access. Results also uncover current misconceptions regarding dental coverage under government insurance programs.

**AMERICANS
OVERWHELMINGLY AGREE:
PREVENTIVE CARE IS KEY
TO A BETTER ORAL HEALTH
SYSTEM AND IMPROVED
OVERALL HEALTH**

Findings are a result of a survey across five stakeholder groups commissioned by DentaQuest and executed by KRC Research between July 11 and Aug. 12, 2019. See next page for full methodology.

DentaQuest (2019). *Reversible Decay: Oral Health is a Public Health Problem We Can Solve*. Boston, MA.

INTRODUCTION

DentaQuest, the nation's leading purpose-driven oral health care organization, commissioned a large-scale opinion study to understand various perspectives on oral health care in the United States today. The study spanned five core groups of stakeholders: patients, dentists, physicians, employers and Medicaid dental administrators.

Together, the collective learnings from these stakeholders form a 360-degree perspective of attitudes, opinions, perceptions, challenges and desires surrounding oral health in the United States.

The findings from this research comprise this report, *Reversible Decay: Oral Health is a Public Health Problem We Can Solve*.

METHODS

KRC Research, an independent third-party opinion research firm, used a three-phase process that began with a comprehensive analysis of existing research and information on attitudes on oral health across various stakeholders.

This analysis informed the second phase to design and execute a custom quantitative survey. Following data collection, KRC moved to the third phase, which was analyzing and reporting the data.

KRC fielded all five surveys using online methods and achieved the following responses:

- 1,500 U.S. adults (referred to as Patients throughout)
- 305 Dentists
- 301 Physicians
- 252 Employer benefits decision-makers at medium to large companies (referred to throughout the report as Employers)
- 41 Medicaid dental administrators

The Medicaid-Medicare-CHIP Services Dental Association assisted with the development of the survey for Medicaid dental administrators and supported the implementation of the survey for this stakeholder group.

Each survey was 15 minutes in length, fielded between July 11 and Aug. 12, 2019, and the sponsor of the research was not identified to the respondents. Data were weighted to reflect each population accurately.



DentaQuest is a purpose-driven oral health care company dedicated to improving the oral health of all. DentaQuest does this through Preventistry® – an all-in approach to better care, expanded access, value-based financing, and innovative solutions. DentaQuest manages dental and vision benefits for 27+ million Americans and provides direct patient care through its network of more than 85 oral health centers in 5 states. DentaQuest provides outcomes-based, cost-effective dental solutions for Medicaid and CHIP, Medicare Advantage, small and large businesses, and individuals nationwide. And, the company has invested more than \$200 million in grants and programs to achieve measurably healthier communities across the country.

THE CURRENT U.S. ORAL HEALTH SYSTEM IS FAILING AMERICANS

Patients (61%), dentists (65%), physicians (64%), employers (58%) and Medicaid dental administrators (90%) largely see the current state of oral health in America as fair or poor, indicating the system is failing.

In their opinion, oral health in the U.S. is stagnant, having been the same or worse over the past 5 years. Many also anticipate continued stagnation, or worse, a

downward trajectory, over the next 5 years (Figure 1.1). Interestingly, while Medicaid dental administrators are in line with other stakeholder groups in their opinions on how oral health has changed in the past five years and what they expect in the next five, they are significantly more likely than other groups to feel that the current state of oral health is fair or poor.

1.1. Stakeholder Perceptions of Americans' Oral Health

	Past 5 Years 'Stayed the Same' or 'Gotten Worse'	Current State 'Fair,' 'Poor' or 'Very Poor'	Next 5 Years Going to 'Stay the Same' or 'Get Worse'
Patients	64%	61%	67%
Dentists	55%	65%	68%
Physicians	73%	64%	79%
Employers	64%	58%	69%
Medicaid Dental Administrators	65%	90%	66%

HIGH COSTS AND OTHER BARRIERS LIMIT ACCESS

In addition to its stigma as “expensive,” many (52%) patients see the U.S. oral health system as scary, confusing, inconvenient, or even ineffective (Figure 2.1).

Our findings indicate that one in three Americans lack dental insurance (34%), and cost and access issues characterize the failing oral health system in the United States.

In fact, three in four patients have experienced a barrier to care (Figure 2.2).

Dentists, employers and Medicaid dental administrators alike recognize these barriers.

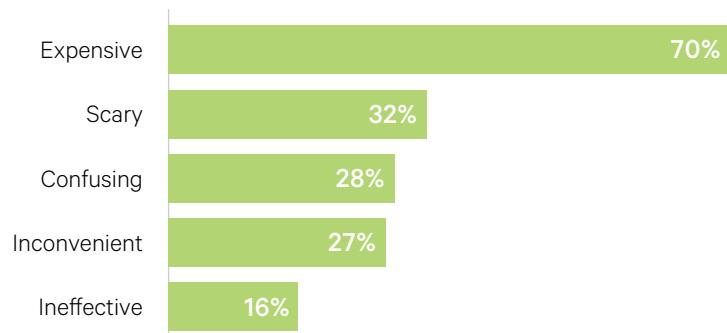
- Dentists believe the system is expensive for patients (66%) and that the cost of dental care

(84%), patient fear (73%) and lack of dental insurance coverage (65%) are all barriers to care.

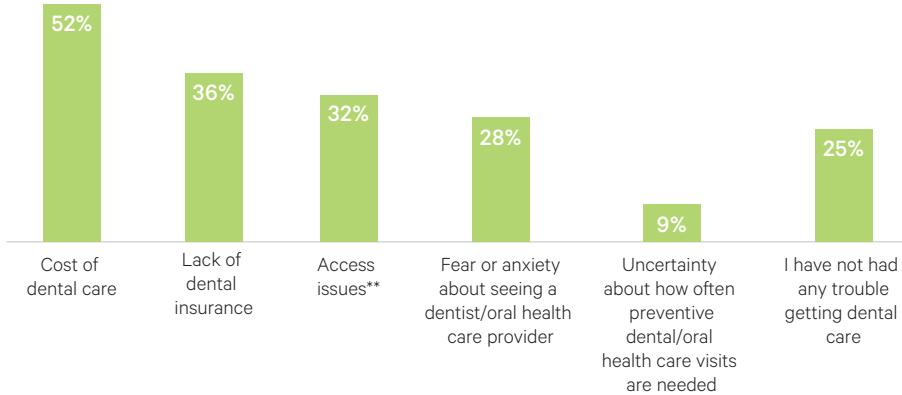
- According to employers, rising costs for employees (48%) and their organizations (47%) get in the way.
- Medicaid dental administrators note that Medicaid dental funding is inadequate (66%), and knowledge (90%) and fear (80%) are top barriers to care for their beneficiaries.

Dentists believe innovative practices such as school-based dentistry (68%), collaborative care teams (64%), and wraparound services like transportation or child care (46%) can be effective for overcoming patient barriers to care.

2.1 Patients’ Perceptions of the U.S. Oral Health Care System



2.2 Patients’ Barriers to Oral Health Care



**** Access issues include:**

- Inability to take time off from work
- Lack of transportation
- Few dentists/oral care providers in area
- Lack of child care so that you can see a dentist/oral care provider
- Hard to find a dentist that speaks your language
- Hard to find a dentist that understands your culture

OVERALL HEALTH SUFFERS WITHOUT ACCESS TO ORAL HEALTH CARE

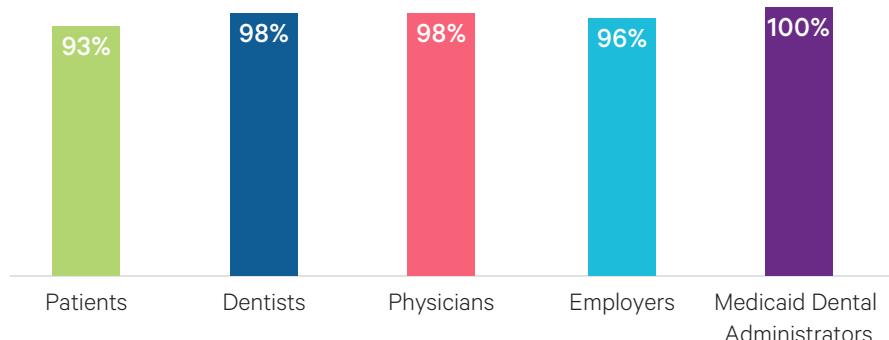
Patients (79%), dentists (96%), physicians (90%), employers (92%), and Medicaid dental administrators (85%) all believe oral health and overall health are connected. They also believe access to dental care and dental insurance are important for improving overall health (Figure 3.1).

Sentiments are consistent across demographic subgroups for these populations.

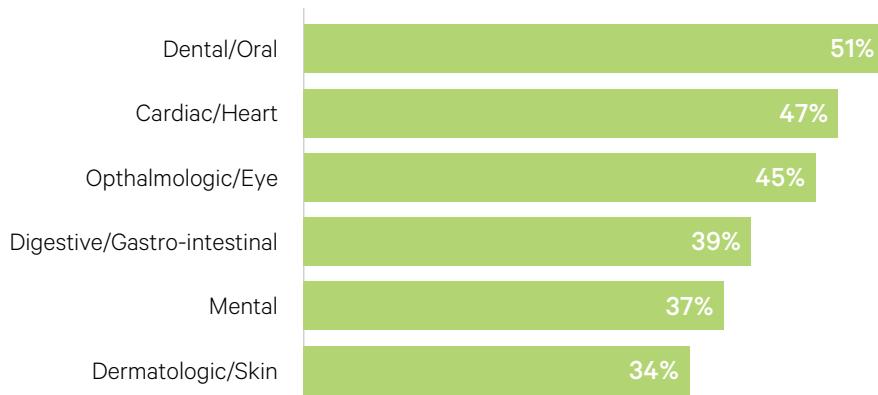
Moreover, oral health is the top health concern for patients; even more than cardiac, eye, gastrointestinal, mental, or skin concerns (Figure 3.2).

The subgroups with the highest concern for their oral health are the 35-44 age group (64%) and Black Americans (63%).

3.1 Access to Dental Care is Important for Improving Overall Health



3.2 Patients' Personal Health Concerns



THERE IS WIDESPREAD DESIRE FOR COLLABORATIVE SOLUTIONS

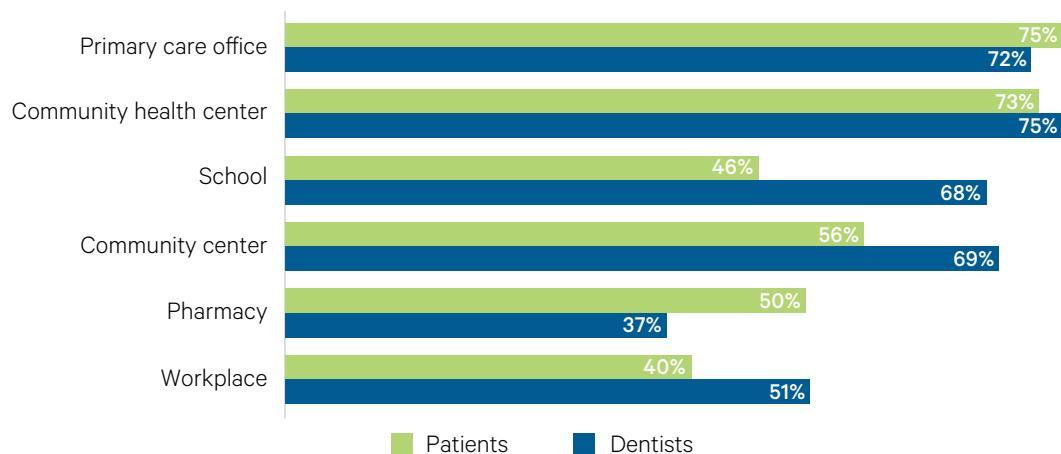
Medical-dental integration has support from all sides. Patients (76%), dentists (93%), physicians (86%), employers (82%), and Medicaid dental administrators (98%) all believe collaborative care can improve patient outcomes.

Both patients and dentists see value in expanding dental care to locations outside of dental offices,

including primary care offices and community health centers (Figure 4.1).

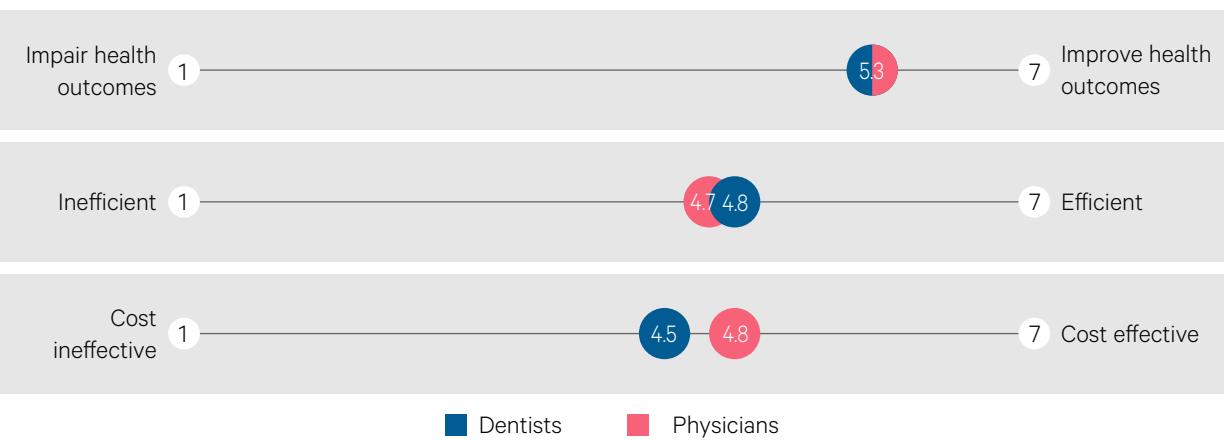
Physicians and dentists are aligned on the benefits of collaborative health teams. They agree collaboration can lead to better health outcomes, efficiencies and even cost effectiveness (Figure 4.2). Some also see collaboration as a path to more agile care delivery.

4.1 Interest in Non-Traditional Care Locations



4.2 Views of Collaborative Health Teams

(Mean score of 1-7 scale)



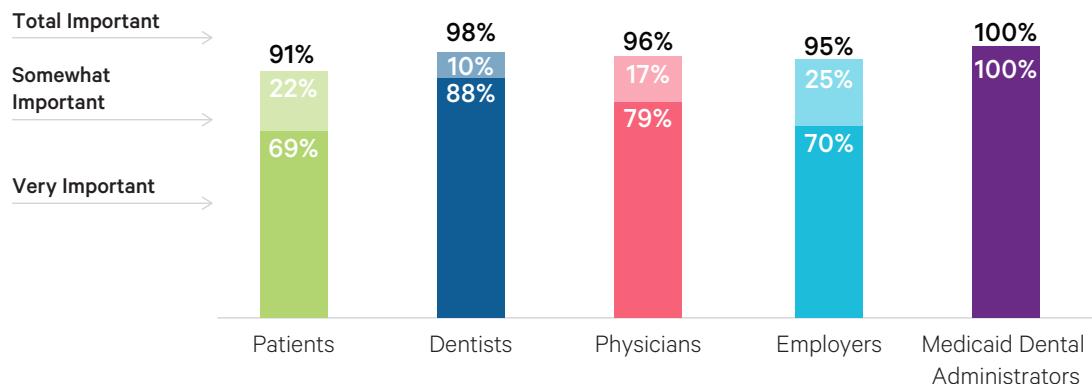
PREVENTION IS KEY TO IMPROVING THE CURRENT STATE OF ORAL HEALTH AND OVERALL HEALTH

All stakeholders agree: preventive dentistry is important to improve overall health (Figure 5.1), and 99% of dentists believe preventive dentistry is important to lower health care costs.

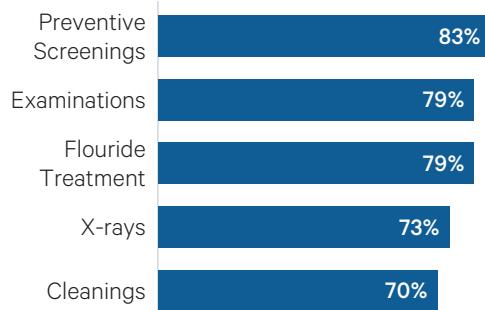
Even dentists agree that it is important to make preventive screenings available in non-traditional care locations (Figure 5.2).

Physicians are open to adding preventive procedures to their practices (Figure 5.3).

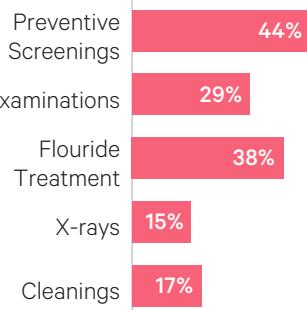
5.1 Importance of Access to Preventive Dentistry for Improving Overall Health



5.2 Dentists' Perceived Importance of Expanding Services to Non-Traditional Care Locations



5.3 Physicians' Interest in Adding Dental Procedures to Practice

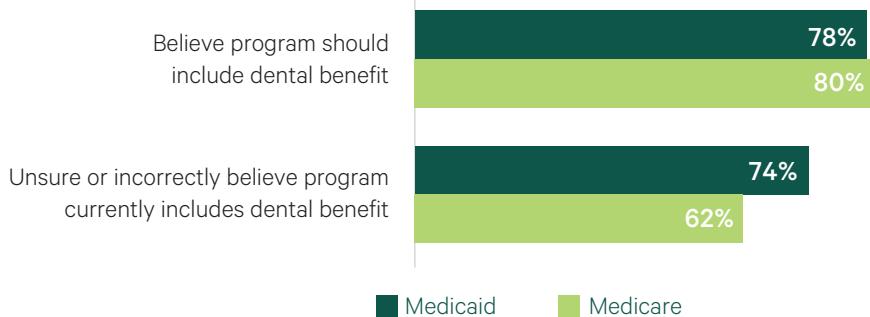


EXPANDING PUBLIC BENEFITS CAN REDUCE BARRIERS

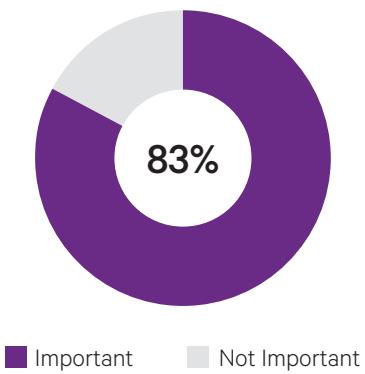
Many patients either aren't sure or incorrectly think Medicaid and Medicare already cover dental care. Regardless of their understanding, patients overwhelmingly agree both programs should include dental coverage (Figure 6.1).

Medicaid dental administrators know they play an important role in addressing barriers to proper oral health care (Figure 6.2). They also believe comprehensive dental coverage will help prevent diseases related to untreated oral health issues (68%) and improve the overall health of their state population (59%) (Figure 6.3).

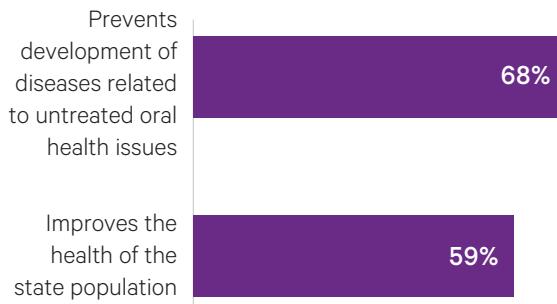
6.1 Patients' Understanding of Dental Benefits Within Medicaid and Medicare



6.2 Medicaid Dental Administrators' View of Their Own Role in Addressing Oral Health Care Barriers



6.3 Most Important Benefits of Comprehensive Dental Coverage Under Medicaid Among Medicaid Dental Administrators



BENEFIT MODELS SHOULD PRIORITIZE HEALTHY OUTCOMES

Value-based care is a health care delivery model that emphasizes prevention and rewards providers for keeping patients healthy. A key driver in the success of value-based care is aligning new payment models designed around care and outcomes, not the volume of services.

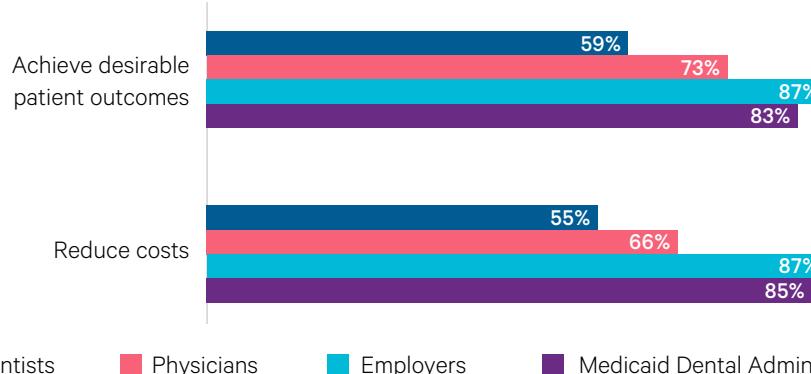
Dentists (73%), physicians (82%) and employers (87%) agree that dental insurance should prioritize healthy outcomes over volume of care. They also agree that value-based care helps their organizations improve patient outcomes and reduce costs (Figure 7.1).

Most patients think dental insurance providers currently make decisions based on cost, but feel

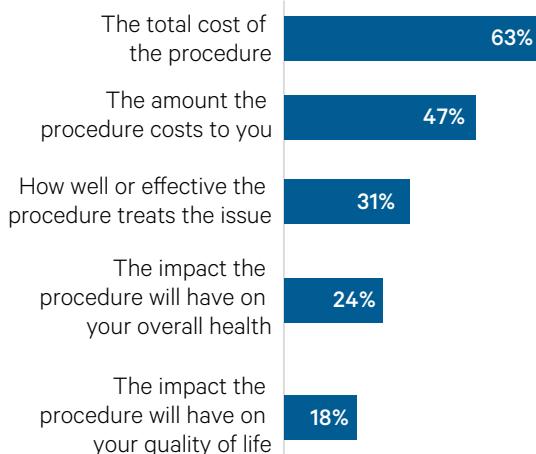
dental insurance should be based primarily on the impact the procedure will have on overall health (Figure 7.3).

More than half of employers (51%) say their organizations would be interested in implementing a value-based care benefit design for dental coverage. Additionally, more than four in 10 employers are open to considering innovations in employee benefits, including providing access to medical screenings and associated referrals to health professionals (48%), providing convenient access to urgent dental care (40%), and offering options for telehealth or e-visits (38%).

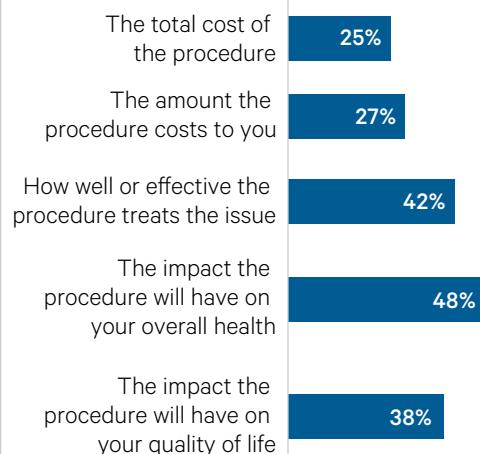
7.1 Motivations to Pursue Value-Based Care



7.2 How Patients Think Dental Insurance Providers Make Decisions



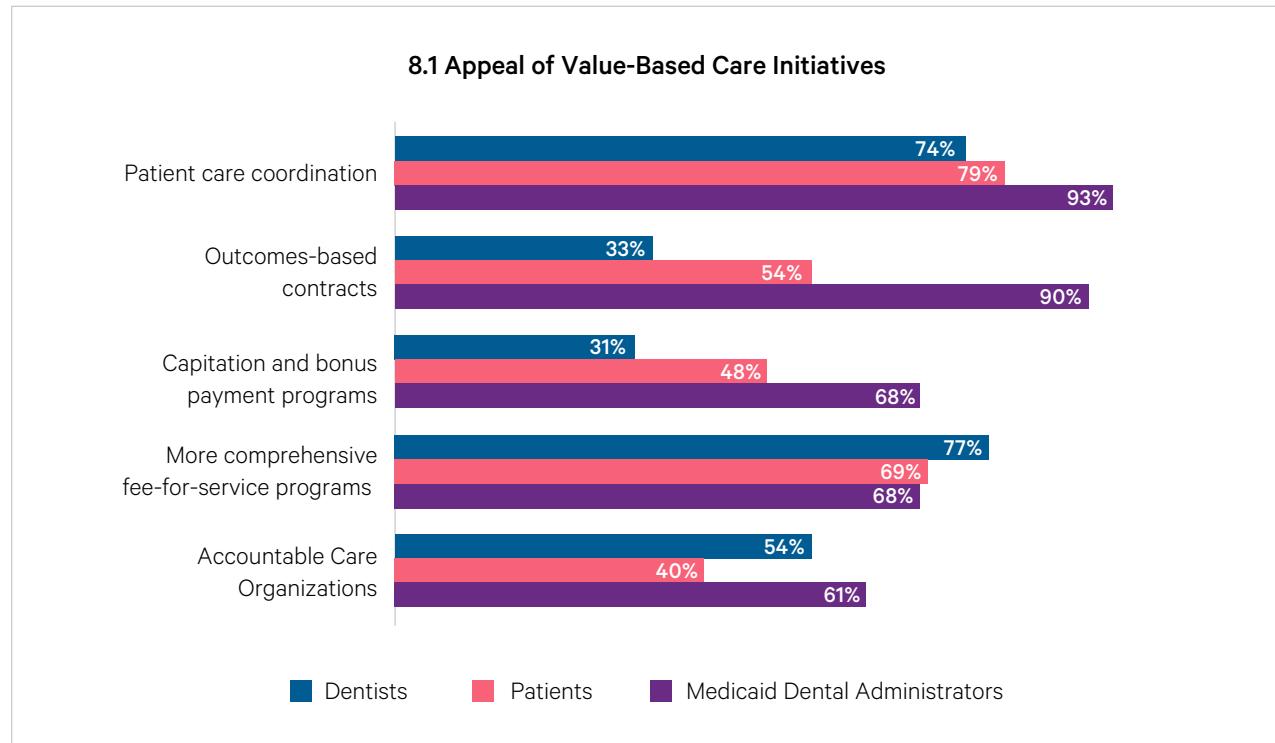
7.3 How Patients Think Dental Insurance Providers Should Make Decisions



VALUE-BASED CARE INITIATIVES HAVE WIDESPREAD APPEAL

Medicaid dental administrators favor care coordination, outcomes-based contracts, and capitation and bonus payment programs when it

comes to value-based care initiatives. Dentists and physicians are aligned on their interest in patient care coordination (Figure 8.1).



CONCLUSION



- Oral health is a key component of overall health and a top health concern for Americans.
- The U.S. oral health system is failing and Americans aren't getting the care they want and need.
- There's overwhelming consensus on how to fix it:
 -  Prevention first
 -  Medical-dental integration
 -  Expanded access
 -  Comprehensive adult benefits
 -  Value-based care

To Learn More, Visit DentaQuest.com/ReversibleDecay and Preventistry.org

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