



Association of Dental Support Organizations

White Paper: The Future of the Dental Industry

Mouth-Body Connection®, Technological Innovations, Demographic Drivers of Patient Demand, Labor Supply Among Oral Health Trends to Watch in 2023



The dental industry is evolving at an accelerated rate – driven by the impacts of COVID-19, technological innovations, the rise of inflation, an aging population in need of more dental services, an increasingly tight labor market and the ongoing transition from solo to group practices. As 2022 draws to a close and we approach the new year, understanding and anticipating changes to the industry landscape will be critical. In this *Future of the Dental Industry* report, the Association of Dental Support Organizations (ADSO) highlights four trends likely to have an exponential impact on the already dynamic dental space in 2023.

Key trends:

- 01 Increased focus on the Mouth-Body Connection®**
- 02 Technology as a driver of resiliency and growth**
- 03 Staffing and retention in an unprecedented labor market**
- 04 Dental Support Organizations (DSOs) as a partner for new dentists**

This report is supplemented by insights from a recent ADSO webinar titled “A Conversation on Wages, Workforce and the Economy,” which featured a discussion among senior leaders of four major Dental Support Organizations: Steve Bilt, CEO of Smile Brands Inc.; Robert Fontana, Founder and CEO of Aspen Dental; Stephen E. Thorne, Founder and CEO of Pacific Dental Services; and Rick Workman, Founder and Executive Chairman of Heartland Dental. The full webinar may be viewed [here](#).

01

The Mouth-Body Connection®: A holistic approach to patient health



Ten years ago, the Dental Research Journal published the results of a [study](#) underscoring the critical connections between **periodontal disease and a multitude of systemic conditions or chronic diseases, including diabetes, cardiovascular disease, stroke, kidney disease, lung disease and adverse pregnancy outcomes**. However, more than a decade later, oral health continues to be largely separated from traditional healthcare. But signs are beginning to point to a reversal in that trend, with policymakers at the state and federal levels placing a renewed focus on closing the divide between dental and general healthcare. Recent findings about the correlation between poor oral health and COVID-19 severity may have provided a much-needed wake up call to healthcare regulators about the importance of recognizing the link between oral and systemic health.

For example, in passing legislation earlier this year requiring private health insurers to cover the diagnosis and treatment of congenital anomalies and birth defects (such as reconstructive services), the U.S. House of Representatives included teeth and the oral cavity, as well as adjunctive dental, orthodontic or prosthodontic support in its listing of covered services.

The legislation, called the Ensuring Lasting Smiles Act, is now awaiting action in the U.S. Senate, where it has 40 bipartisan cosponsors. In addition, separate legislation pending in Congress – H.R. 4555, the Oral health Literacy and Awareness Act of 2021 – would require the Health Resources and Services Administration (HRSA) to conduct a public education campaign to increase oral health literacy and awareness, with a particular focus on children, pregnant women, parents, older adults, people with disabilities and racial and ethnic minorities. These bills are unlikely to receive a vote before Congress adjourns in December and will need to be re-introduced in 2023.

“We’re working actively toward what we call the Mouth-Body Connection®, and dental-medical integration. Oral health really matters to overall health. The science is there. The studies are there. The patients get it.

– Stephen E. Thorne, IV, Founder and Chief Executive of Pacific Dental Services

For years, ADSO members have been working toward greater oral health integration. For example, Pacific Dental has co-located a medical and dental clinic. Other DSOs are recognizing the trend of healthcare moving together, promoting the idea that you cannot do one separate from the other. Westwind Integrated Health provides oral healthcare based on the patient’s general health conditions. The team evaluates the patient’s medical history and looks for care gaps that can easily be filled. The goal is to fill all care gaps either in the dental chair or in collaboration with medical providers. Oral care treatment plans are developed based on the patient’s medical condition and in collaboration with their primary care provider to ensure the oral treatment rendered aid in the reduction of systemic inflammation. As technology evolves, the future of integration will include the incorporation of artificial intelligence and telemedicine.

ADSO also supports changes to the federal Medicaid system that would increase coverage while ensuring fair reimbursement for affiliated providers’ services – which would help ensure a robust provider network and access to oral health care for patients currently lacking coverage.

02

Technology as a driver of resiliency and growth



The COVID-19 pandemic changed how we do just about everything. And dentistry is no exception. Over the past few years, we have seen a wave of technological advances – both clinical and non-clinical – that are improving efficiencies, lowering costs, enhancing patient care and broadening accessibility.

That evolution in dentistry is expected to not only continue, but to accelerate in the coming months and years. Whether it is artificial intelligence, robotic dentistry, CAD/CAM technologies, 3D printers, intraoral scanners, digital workflows or cloud-based patient portals, a successful dental practice must prioritize technological innovations to remain competitive.

TECHNOLOGICAL ADVANCES IN DENTISTRY:

IMPROVING EFFICIENCIES, ENHANCING PATIENT CARE, BROADENING ACCESSIBILITY

For example, sophisticated diagnostic equipment helps dentists identify disease at an earlier stage, allowing for problems to be addressed with less invasive equipment. In addition, the COVID pandemic put a spotlight on the growing importance of teledentistry in improving access to care, particularly among underserved communities and the Medicaid population. And DSOs are leading in finding ways to utilize data and technology to create a centralized model that improves practice management and provides improved care for patients – whether in person or virtual.

“More and more, patients are demanding better technology, easier technology, easier ways to pay for things, more transparency all the way along the process – making it easier to book an appointment, easier to find out why their claim wasn’t paid. We’re working on all those areas to make the user experience, from our internal customers [dentists] to their patients, better.”

– Stephen E. Thorne, IV, Founder and Chief Executive of Pacific Dental Services

A recent survey by the American Dental Association found that 49% of dentists plan to spend somewhat more money on technology over the next two years. In that survey, 55% of responding dentists ranked intraoral scanners as being revolutionary for their practices, followed by 3D printing (50%), imaging (40%) and CAD/CAM (36%).

03

Staffing and retention in an unprecedented labor market



As the employment rollercoaster continues in the wake of the COVID-19 pandemic, dental practices are not immune to staff shortages – with a recent report from the Health Policy Institute (HPI) **finding** that more than a third of practices are currently recruiting for a hygienist or assistant. The HPI report also found that one in three dentists who do not have full appointment schedules cite trouble filling staffing positions as a contributing factor.

In Boston, for **example**, labor shortages in local dental practices have resulted in patient waits for appointments stretching several months. According to one dentist, “I would say this is pretty much the worst I’ve seen it.”

Dental schools are working to help fill the gap. In Pennsylvania, the University of Pittsburgh School of Dental Medicine **recently announced** new state funding for a paid apprenticeship program to help address the state’s shortage of health care professionals. “There is an extreme shortage of dental assistants in the United States, including here in our own building, so we were looking for creative solutions to solve this problem,” said Jim Earle, Ed.D., MBA, executive dean for strategic development and operations at Pitt Dental Medicine.

ONE IN THREE DENTISTS WHO DO NOT HAVE FULL APPOINTMENT SCHEDULES CITE TROUBLE FILLING STAFFING POSITIONS AS A CONTRIBUTING FACTOR

But industry leaders must also do more to attract and retain a high-quality workforce – including offering competitive compensation and benefits and fostering a supportive workplace environment. And DSOs are committed to finding long-term solutions for a problem that could affect dentistry for years to come.

“Support programs, training programs, retention programs, all those things will be more critical in fighting the turn of folks.

– Robert Fontana, Founder and Chief Executive of Aspen Dental

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DSOs as a partner for new dentists

In this dynamic industry environment, acclimating to life as a new dentist can be overwhelming for newly graduated dental students. That's where DSOs come in.

New graduates often encounter high startup costs, limited growth opportunities and an overflow of non-clinical administrative tasks. According to the American Dental Education Association, 2020 dental school graduates with federal loans owed an average of nearly \$305,000. DSOs play a critical role in helping alleviate both the dramatically increased start-up costs faced by new dentists and the burdens of practice management by managing a wide array of responsibilities, including procurement, marketing, human resources, compliance, IT and finance. In doing this, they enable dentists to focus on what matters most: the health of their patients.



DSOs enable dentists to focus on what matters most:

**THE HEALTH OF
THEIR PATIENTS**

“I think of a dental school teaching a student the complex clinical skills necessary for passing the dental boards, as well as how to get a dental license. And then a DSO really creating an opportunity to teach a dental student how to survive with a license in a world of ever-increasing costs and complexity.

– Steve Bilt, Chief Executive Officer of Smile Brands Inc.

The DSO model is designed to attract future talent – providing the necessary tools for individual dentists' sustained growth and success. DSOs are also proactive in advocating for dental students in and outside of the practice, with benefits including access to proven technologies, strategic mentorship programs, networking opportunities and a culture predicated on a healthy work-life balance.