

PRESS RELEASE

Survey reveals dental industry is at inflection point for value-based care

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<https://www.healthscape.com/about/news/survey-reveals-dental-industry-is-at-inflection-point-for-value-based-care>

September 17, 2024 (Chicago, IL)—HealthScape Advisors, a Chartis Company, in collaboration with the CareQuest Institute of Oral Health® and the National Association of Dental Plans (NADP), today released **Pathway to value**. The survey illuminates dental payers' and multisite providers' perspectives on, and experience with, the transition of dental reimbursement from fee-for-service to a value-based model, with the ultimate objective of promoting cross-industry dialogue and meaningful advancement toward value-based care (VBC).

"The dental industry is reaching a critical inflection point," said Caitlin Walsdorf, Partner at HealthScape Advisors. "Now is the time for plans and providers to reassess their market position, determine future-state strategies, and work with industry counterparts to establish effective, scalable, and mutually beneficial VBC programs that can integrate care, elevate patient outcomes, and create differentiation in an increasingly competitive market."

"These survey findings give us a clearer industry baseline than ever before, providing us with valuable insight into the perspectives, activities, and plans of payers and providers regarding value-based care," stated Rebekah Mathews, Vice President of Health Transformation at CareQuest Institute for Oral Health. "This will allow us to work together to identify shared goals, and target areas where more meaningful collaboration can happen."

"There's a lot of discussion about value-based reimbursement in dental, but not a lot of data or even a common understanding of what the term means," said Mike Adelberg, Executive Director of the National Association of Dental Plans. "This survey is the most comprehensive picture yet of what is happening with respect to value-based models in dental care."

The survey found that:

- Significant dialogue on VBC has taken place across the dental industry, but there remains no clear definition or standard. The phrase also elicits varying sentiments between payers and providers.

- The survey reveals a stark contrast in VBC adoption between large and small organizations. **75%** of large plan respondents and **71%** of large provider respondents have experience with VBC. For those payer and provider respondents without VBC experience, larger entities were more likely to implement in the near term.
- For plans, legacy systems continue to impede progress. Only **25%** of plans using outdated technology are likely to implement VBC in the near term, compared to nearly **50%** of those with modern or modernized systems. Technology and systems infrastructure do not appear to influence provider experience to the same extent.
- For payer respondents without VBC experience, the attributes of those likely to explore implementing VBC models in the near term include health plans (i.e., plans that offer both medical and dental coverage), larger organizations, and organizations with modern or modernized technology.
- Payers and providers distrust each other's motivations for VBC, but these two groups have common goals. For example, both parties ranked improved preventive dentistry for children and improved preventive dentistry for adults as the two most important VBC program goals.

Survey respondents comprised dental payers representing 100 million commercial members and approximately 70 million government program members. Dental payer respondents included stand-alone dental plans, health plans, and multi-line plans. Dental service organization respondents were multi-location practices that represented more than 3,400 locations across 48 states. Read more about the survey's methodology and access the full report [here](#).

About HealthScape Advisors

HealthScape Advisors, a Chartis Company, is a management consulting firm dedicated to helping organizations solve the most challenging business problems in healthcare. HealthScape supports health plans, providers, specialty health companies, investors, and innovators as they embark on their most important initiatives, helping them to grow profitably, improve performance, and transform their businesses. Purpose-built for healthcare, HealthScape brings its clients a deep and broad understanding of the ever-changing complexities that make up the healthcare marketplace. It is because of this expertise and experience that clients rely on HealthScape as a trusted strategic advisor and thought partner.

About CareQuest Institute

CareQuest Institute for Oral Health® is a national nonprofit championing a more equitable future where every person can reach their full potential through excellent health. CareQuest Institute does this through their work in philanthropy, analytics and data insights, health transformation, policy and advocacy, and education as well as their leadership in dental benefits and innovation advancements. CareQuest Institute collaborates with thought leaders, health care providers, patients, and local, state, and federal stakeholders, to accelerate oral health care transformation and create a system designed for everyone.

About NADP

NADP is the largest non-profit trade association focused exclusively on the dental benefits industry. NADP members provide dental HMO, dental PPO, dental indemnity, and dental savings plan products to more than 200 million Americans with dental benefits. NADP members include the entire spectrum of dental carriers: companies that provide both medical and dental coverage, companies that provide only dental coverage, major national, regional, and single-state companies, as well as companies organized as non-profit plans.