



The Need for Digital Dentistry Education

A Global Evaluation of Patients'
Awareness, Attitudes and Behaviors

Digital ■
Dentistry
Difference

 **Carestream**
DENTAL

DigitalDentistryDifference.org

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INTRODUCTION

As in all healthcare fields, patient care in dentistry is being transformed by digital technology. From intraoral scanners and 3D imaging systems, to computer-aided design and treatment planning software, to practice management systems for elevated patient care and communications, digital dentistry is helping make dental care more comfortable, precise and pain-free to create more smiles all around.

Even with all of the ways advanced dental technology is improving patient care, no global benchmark existed to assess patient awareness of this technology and how it impacts patient attitudes and behaviors. For example, even as some patients are coming to expect that their dentists will offer advanced technology, a sizable portion remains uninformed about the benefits of digital dentistry,

and too many continue to avoid going to the dentist altogether, fearing pain that has long been associated with dentistry and even expressing a wariness of the technology.

To establish a baseline of patient awareness, attitudes and behavior, and identify areas where education on digital dentistry could enhance patient care, Carestream Dental commissioned the first *Digital Dentistry Difference: Global Consumer Survey* in November 2019. The online study surveyed 7,000 nationally representative adults across seven global markets: Canada, China, France, Germany, India, the UK and the U.S. The results can serve as a foundation for re-thinking industry best practices that will allow for a stronger connection with patients in pursuit of better dental function, health and appearance.

EXECUTIVE SUMMARY

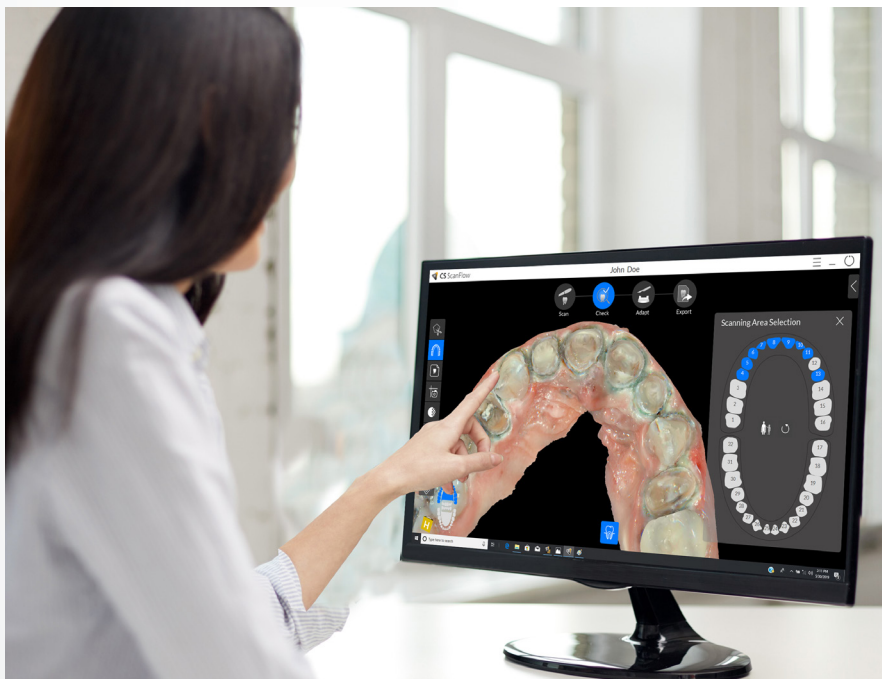
Doctors must recognize the important role technology plays in the lives of their patients, and dental care is no exception. Patients have come to expect more advanced technology, and doctors' use of technology influences patients' perceptions of them, so much so that it can even impact patient attraction and retention.

Technology is improving the patient experience, with almost all patients who have exposure to more advanced technology agreeing that they get better care. Yet, not much time during the appointment is spent educating patients on the technology that is being used. The result is that many patients have less-than-ideal perceptions of their dentists. Consider that less than half of today's patients believe that their dentist or dental assistant uses very advanced technology.

Lack of awareness of how the dental industry has advanced is also a

missed opportunity to bring in new patients. Approximately one in four people who haven't been to the dentist in the last two years say they would be motivated to go if they were educated on how technology could help improve their care. The dental industry can take advantage of a significant opportunity to grow by committing to a concerted effort to educate the public on the benefits of digital dentistry.

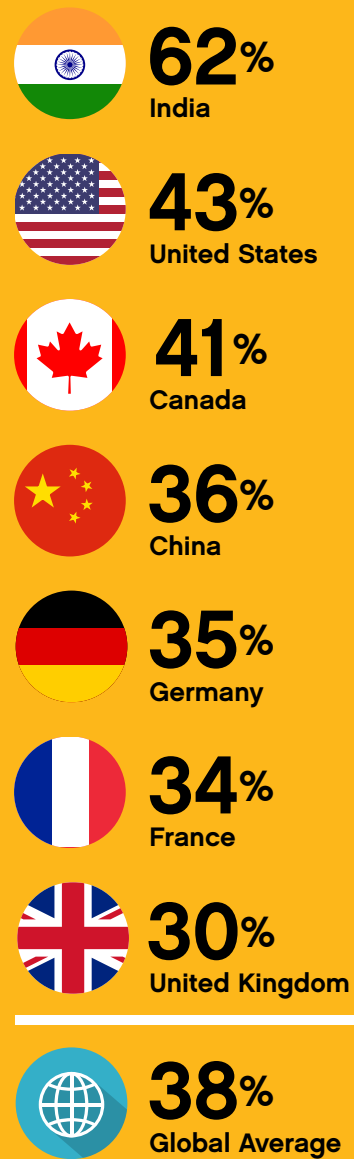
Dentists and dental assistants themselves are the most common source of education for patients, and, as such, can play a tremendous role in delivering digital dentistry education. Simple steps they can take include sharing educational resources through their existing patient outreach channels, such as on their websites, through social media and in local advertising and public relations. Doctors and dental assistants can also spend more time educating patients already in their chairs, helping increase satisfaction among current patients, while also prompting word-of-mouth to drive more patients through their doors.



Global Insights

Who is most proud of their oral health?

Percent of patients who describe their dental health as very good to excellent.



DIGITAL DENTISTRY MAKES A DIFFERENCE

Oral healthcare practices are finding that incorporating advanced technology is essential to meet patient expectations and maintain satisfaction and loyalty. Patients are accustomed to advanced technology in everything from their phones to their cars to their healthcare, and they aren't shy about sharing how it impacts their preferences. Among adults who have ever been to the dentist, **most (66 percent) would consider changing dentists to one who uses more advanced technology.**

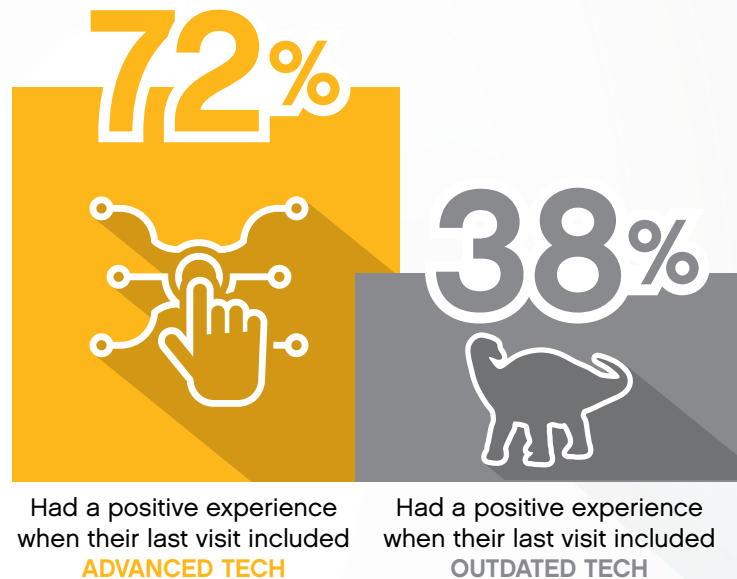
Patients are even more passionate regarding their children's care. A full 90 percent of parents say it is important for their doctor or dental assistant to use the latest digital technology during their child's exam.

Just as important as influencing patients' views of their doctors, use of digital technology is positively impacting overall patient experience. **Among those adults whose doctor or dental assistant currently uses advanced technology, nearly 3 in 4 (72 percent) say they had a very positive to extremely positive experience at their most recent dental visit, compared to only 38 percent of those whose doctor or dental assistant currently uses outdated technology.**

This pattern of having more positive experiences when advanced dental technology is used proves true when asking patients about experiences with specific processes as well. For



Patients are nearly twice as likely to report a positive experience when advanced dental technology is used



example, to take an impression patients typically experience either the traditional process of biting into a tray filled with molding gel or the more modern, digital solution of an intraoral scanner. Of those patients reporting a molding gel was used, only 60 percent reported a positive experience, versus 93 percent of those with whom an intraoral scanner was used.

Not all patients require each specific type of digital dental technology available, but the vast majority (85 percent) of adults who have been to the dentist recall having interactions with digital dental technology of some sort. The most common experience is with digital X-rays (51 percent); patients took note that their scans were immediately available to see on a computer after being taken.

In addition, approximately one fourth (24 percent) of patients recall having digital impressions made of their teeth.

Another common modern experience reported by patients is their dentist's office helping them prepare for and/or follow up after their appointment in a way that was convenient to them, such as text or email reminders, online scheduling or online bill pay (35 percent).

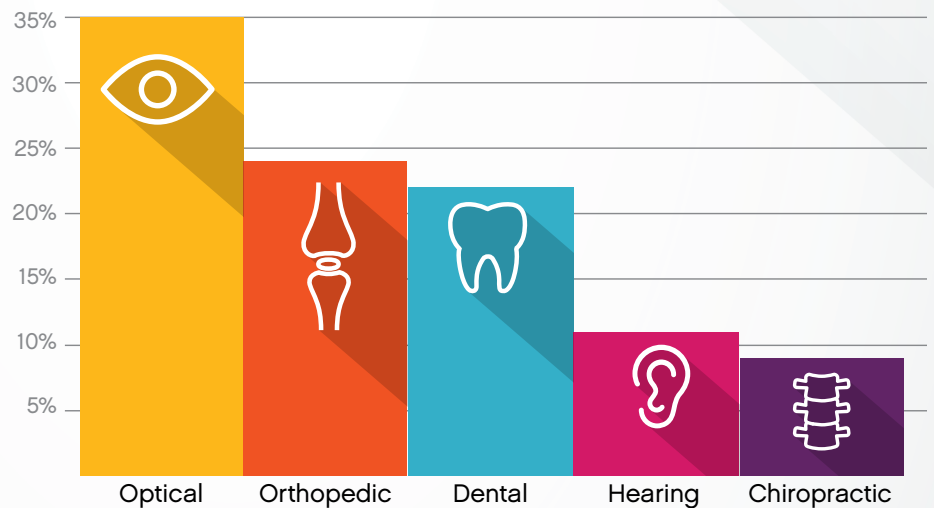
These technologies are leaving patients with a favorable impression. **Nearly all (95 percent) adults who remembered experiencing these or similar kinds of digital dental technology agree they get better care** when their dentist or dental assistant uses the technology during their visits, with more than 3 in 5 (63 percent) agreeing strongly or completely.



LACK OF EDUCATION IS HARMING DOCTOR PERCEPTION

Despite digital dentistry being important to patients, most don't feel well-informed. Only 20 percent of patients say that their doctor or dental assistant shared information with them specifically about the technology used during each exam or treatment, and nearly 30 percent say this information has never been shared.

What healthcare specialty generally uses the most advanced technology?





This is clearly leaving patients wanting more. **Two-thirds (66%) of adults who have been to the dentist would like their doctor or dental assistant to talk in more detail about the technology they use** to care for their patients' mouth. Patients have an even greater hunger for this information. Nearly all (91 percent) of parents say it's important to them that their doctor or dental assistant talks about or shares information with them about the technology used during their child's exam or treatment.

Lack of education is leaving a vacuum that patients may be filling with false perceptions. For example, **less than half of patients believe their dentist or dental assistant uses very advanced technology.**

This gap in awareness about the use of dental technology is also likely hurting public perception of the oral health industry overall. When consumers are asked which healthcare specialty generally uses the most advanced technology, dental falls behind optical and orthopedic.

Less than half of patients believe their dentist / dental assistant uses very advanced technology.



LACK OF EDUCATION LEADS TO FEAR AND AVOIDANCE

Unfortunately, the less that people understand about their oral healthcare, the more they may fear it; and fear is a significant reason many people avoid the dentist.

A majority of adults (81 percent) have felt anxious or scared by the thought of going to the dentist and this fear is amplified among those who haven't been to the dentist in a long time. Nearly half (49 percent) of adults who have not visited the dentist in at least two years frequently feel anxious or scared compared to approximately one third (36 percent) who visited within the past six months.

The top reasons people cite for why they are afraid of going to the dentist is "it's painful" at 44 percent—not surprising given traditional stereotypes. Cost is

the second-most cited reason at 35 percent. **A notable 24 percent cited fear of dental equipment, an area that could be easily alleviated with education.**

Unfortunately, each of these fears can contribute to avoidance. Despite nearly all (97 percent) adults reporting that oral health is important to overall health, many are not going to the dentist regularly. For a full 25 percent of adults, it has been at least two years since their last dental visit.

While they're avoiding going to the dentist, these same adults are passing up an opportunity to actually learn about the state of the technology currently being used and how it leads to direct improvements in patient care and comfort. **One third (33 percent) of adults who have not been to the dentist within the past two years don't even know if their doctor's technology is advanced or not,** compared to 10 percent of those who visited six months to one year ago and 8 percent of those who have visited in within the past six months.

NEARLY
1 in 4
ADULTS

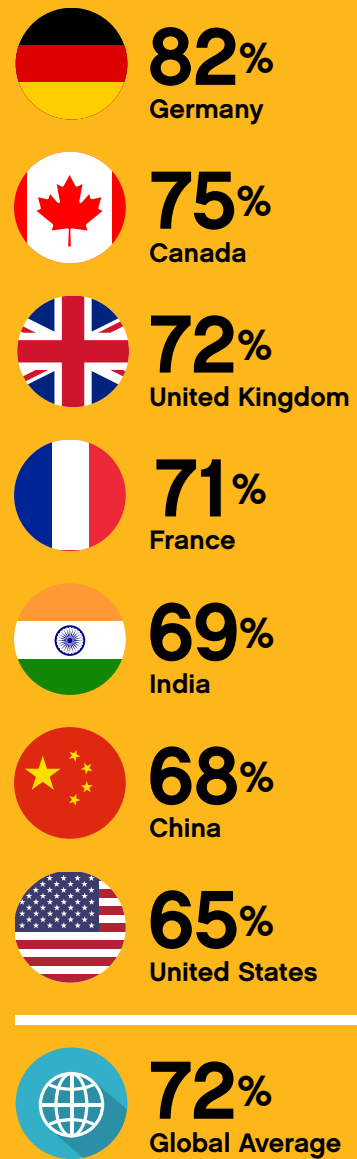
who have felt **anxious or scared** when it comes to going to the dentist say the **dental equipment is the reason why.**



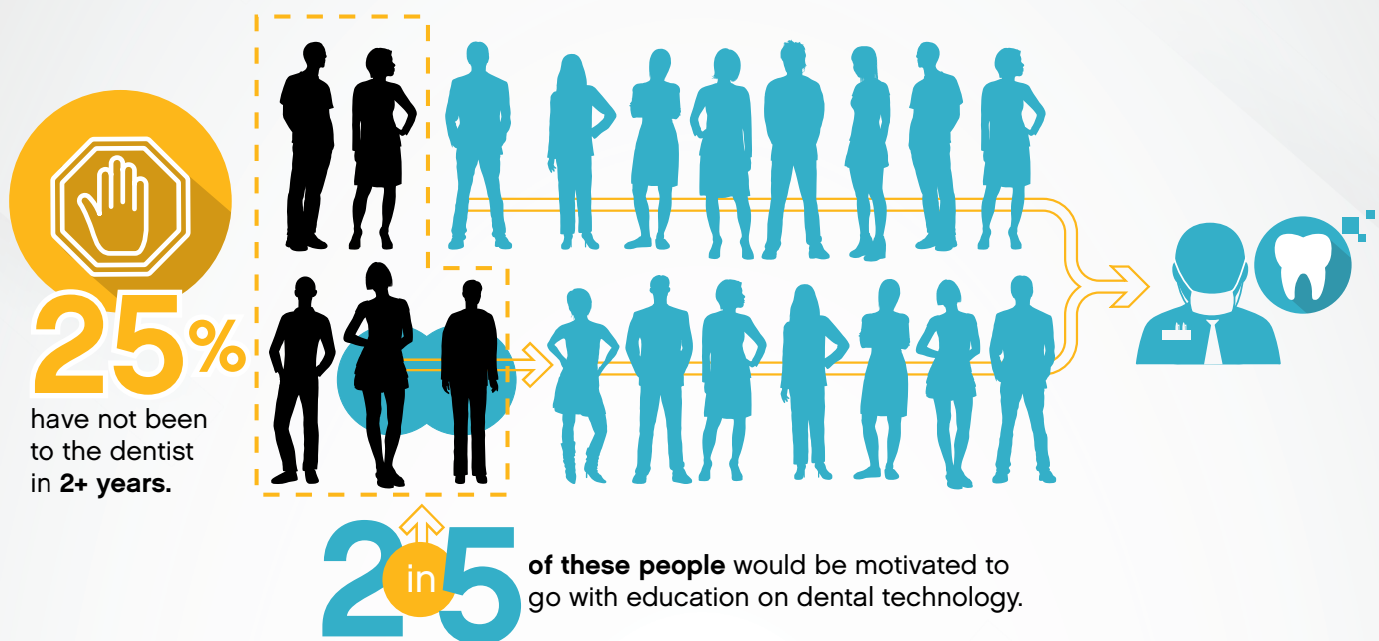
Global Insights

Who visits most?

Percent of patients who have visited the dentist in the last year or less.



Technology Education Brings in New Patients



EDUCATION ABOUT DIGITAL DENTISTRY CAN HELP

Digital dentistry education can drive new patient traffic and help more people get the care they need. Among adults who haven't been to the dentist in at least two years who could be motivated to go, **nearly two in five say they would visit their doctor if they received some form of education about the technology**, specifically how technology is increasing comfort (24 percent), improving results (22 percent), or can help them understand their oral healthcare (20 percent).

Educating about advancements in digital dentistry will also lead to happier patients, who are more

likely to stay loyal over time. Patients report being happier with their care when they receive education on technology used. In fact, **nearly 3 in 4 (74 percent) of patients who reported a positive experience at their last visit said their dentist or dental assistant has shared information about technology used during their exams or treatments. Only 42 percent of patients who reported a negative experience said the same.**

The oral health community can improve public perception of dentistry while simultaneously growing the profession by educating the public on the benefits of advanced digital dental technology and motivating more people to seek care. Carestream Dental is taking a first step with outreach directly

to patients through its Digital Dentistry Difference campaign, leveraging experts to share updates on dental technology through news media and by providing educational resources to more easily explain digital dentistry technology to patients.

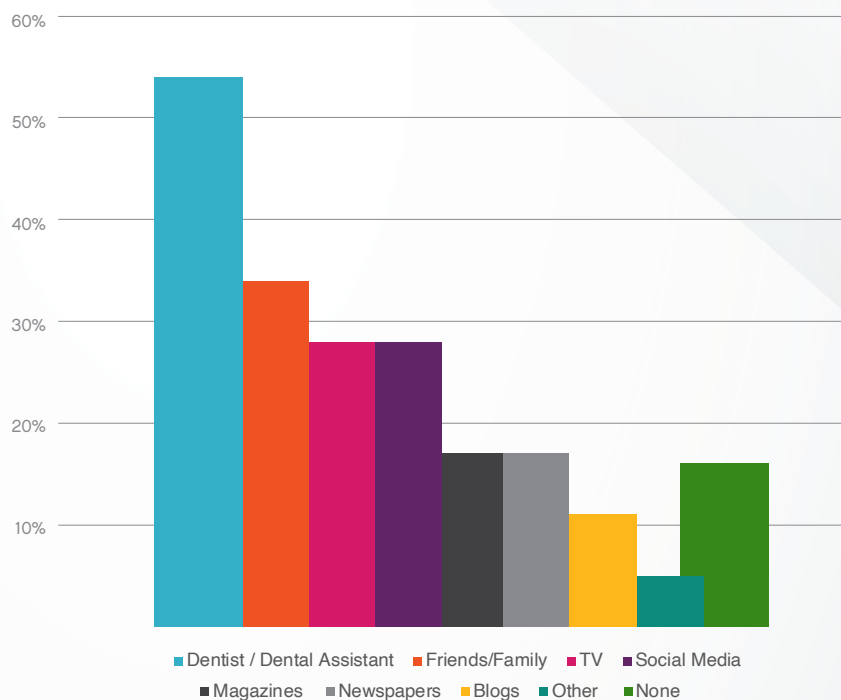
However, for the most success, doctors and their teams must be part of the education effort. **When patients are asked where they get information about dental issues and/or dental hygiene, they are most likely to say, "my dentist or dental assistant" (54 percent)**, ahead of family and friends (34 percent), TV (28 percent), social media (28 percent), magazines (17 percent), newspapers (17 percent) and blogs (11 percent). This reinforces the important role of doctors and assistants as the front lines of



education on digital dentistry. Fortunately, doctors and their teams can make a significant impact simply by sharing educational resources through their existing patient outreach channels, such as on their websites, through social media and in local advertising and PR. They can also spend more time educating patients already through their doors by displaying educational materials in the waiting room or sharing them during consultations. Taking an extra minute or two to mention the benefits of the technology used can help increase satisfaction among current patients, while also prompting word-of-mouth to drive more patients through their doors.

A suite of complimentary resources and tips for education is available for download at DigitalDentistryDifference.org.

Where do you get information about dental issues and/or dental hygiene?





CONCLUSION

As healthcare technology continues to advance, the oral health industry must communicate its own advancements and the benefits of these advancements for patient care in order to remain relevant, ease concerns and improve patient care and satisfaction.

The key takeaways from this survey include:

- ☑ The substantial majority of patients care about the use of technology in their oral care and want to know more about it.
- ☑ Not much time is spent on education, and that is hurting patient perceptions of their doctor and the industry.

- ☑ Many people still are not getting the care they need, and fear of dental equipment is a culprit.
- ☑ Education about digital dentistry can help by motivating more patients to visit their oral healthcare provider and by increasing satisfaction of those already in the chair.
- ☑ As the number one source of information on oral health issues, doctors and team members are the best positioned to make a difference simply by talking in more detail about the technology used.

While oral healthcare professionals have been deeply immersed in the process of adopting and leveraging new

digital technology, patients have largely been unaware of this transition. A greater focus on education will help ensure that patients are more comfortable and satisfied, and that doctors and their teams are getting the credit they deserve for the adoption of digital technology.

Digital Dentistry Difference: 2019 Global Consumer Survey. The online study was conducted by Wakefield Research on behalf of Carestream Dental between November 12 and November 24, 2019, among surveyed 7,000 nationally representative adults across seven global markets: Canada, China, France, Germany, India, the UK and the U.S. An equal number of respondents was taken from each market, to ensure a statistically significant sample. Wakefield research is a leading, independent provider of quantitative, qualitative and hybrid market research and market intelligence, supporting the world's most prominent brands, including 50 of the Fortune 100, in 70 countries.