

A Snapshot on Italian Dentistry, Have Italians Given Up the Dentist?

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Italian dentistry today is completely different from what it was 25 years ago or even as little as 7 or 8 years ago. But, what kind of a change is it? Is there a crisis and for whom? For private or for public dentistry? For patients or for everyone? For sure, an epochal change has taken place and in such a context Italian dentistry needs to adapt to the new reality and adjust to the emerging market needs.

Registered dentists
2015, est.
60,600

**Population to
dentist ratio**
2015, est.
1,003

Population
60.7
millions

Active dentists
2013, est.
39,075-45,896

Total oral health expenditure
2016, Istat est.
9,6 billion

**Active dental
offices**
est.
41,000



According to the Italian National Institute of Statistics (ISTAT), in 2005, the number of people visiting a dentist in the last 12 months was 39.3%. In 2013 it fell to 37.9%. A 2% fall in eight years is not so much, but dental practices are losing around 40% of turnover. So, what's going on? The answer is simple. **Patients visit a dentist less frequently and the number of patients deferring their visits has increased from 24% in 2005 to 29.2% in 2013.**

It is essential to note that economic reasons account for 85.2% on the total of those who have deferred dental visits. In 2013, 12% of people aged 14 and over had not visited a dentist or had not had a dental treatment, in the previous 12 months, for economic reasons. Dentistry is changed. Dentists are mostly working on performance, not because the population is no longer going to the dentist but simply because it has reduced

the number of visits, maybe for many of those treatments that do not have to do with emergency or pain.

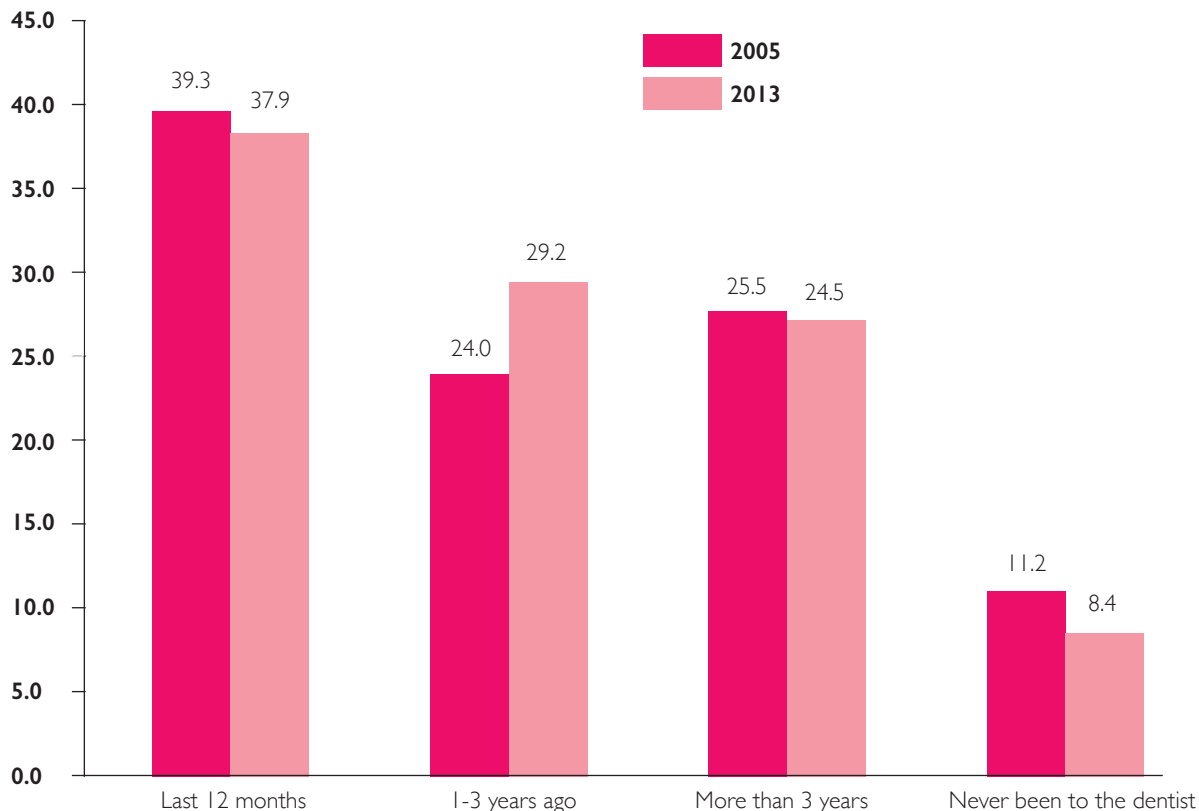
A major concern is the diversification of the country, with northern Italy being completely different from the south in terms of oral health. In the South of Italy (Istat data) only 27.7% of the population aged 3 and over resorted to dental treatment compared to the national average of 37.9%. Also, as far as number of visits for prevention in the South, the percentage of people that make them is almost half (16.1%) of that of the North (30.7%), while the number of those who have never been to a dentist is double: 12.1% against 6.2%.

A further paradox is the increasing trend in the use of public or subsidized dental facilities within the country except for southern Italy, which has gone down from 4.4% in 2005 to 4.1% in 2013.

But despite all, the oral health of the total population has improved; in 2005, 37.8% of Italians had 28 natural teeth, rising to 41.4% in 2013. While in 2005, 12% were edentulous patients, falling to 10.8% in 2013.

According to a study, made by the Bocconi University (Milan-Italy), on the operating mode of Italian dentistry, 75% of dental practices are made up of individual-independent professionals. So, the financial crisis is not so much for the patient (still going to the dentist, but less frequently and with improved oral health) but more for the mono-professional practice, mostly made up of professionals with an average age of 53 years, operating on average 24 years within their profession. **According to the survey, 77.7% of dentists are over 45 years-old and 69% have been working as dentists for over 20 years.** So, when we talk about a crisis on revenues, we address a population of dentists mainly in this segment which is facing an identity crisis needing to be dealt with, differently from younger dentists that might already have found the countermeasures to react to the change. According to the study, in 2015 over a third of dental practices have had lower revenues from previous year; among them, 80% are solo practices, many reporting having a lot of competition around them and most of them having few patients (less than 10 per day).

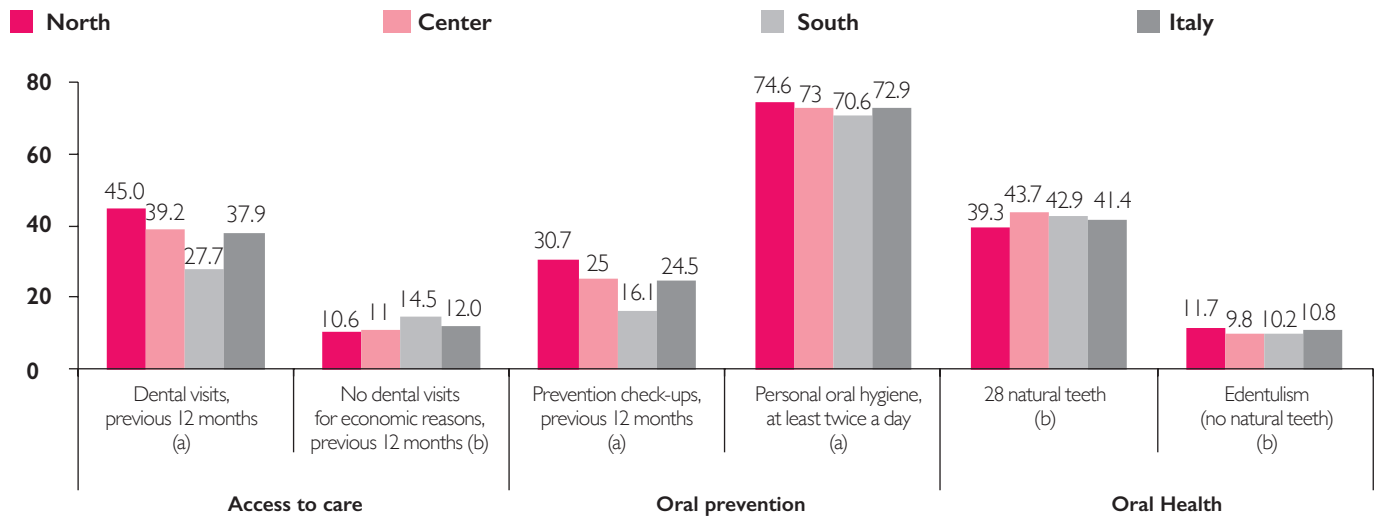
POPULATION 3 YEARS AND OLDER FOR FREQUENCY OF VISITS TO A DENTIST OR ORTHODONTIST
Years 2005 and 2013, standardized rates per 100 people



Source: Istat, July 2015

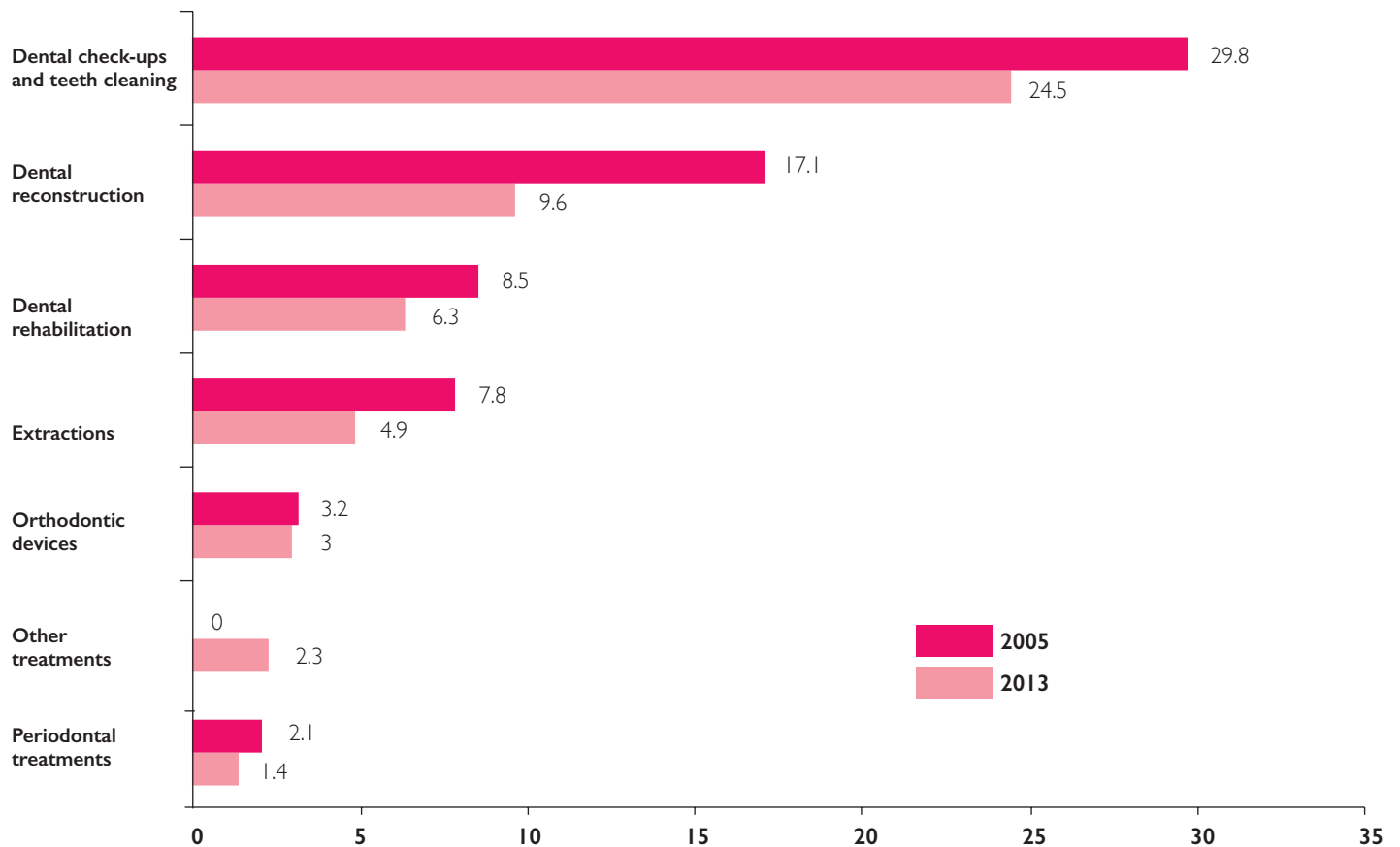
MARKET OVERVIEW

MAIN INDICATORS FOR ACCESS TO DENTAL CARE, PREVENTION AND ORAL HEALTH GEOGRAPHICAL BREAKDOWN. Year 2013, standardized rates per 100 people



Source: Istat, July 2015

POPULATION 3 YEARS AND OLDER FOR TYPE OF TREATMENT IN THE LAST 12 MONTHS. Years 2005 and 2013, standardized rates per 100 people



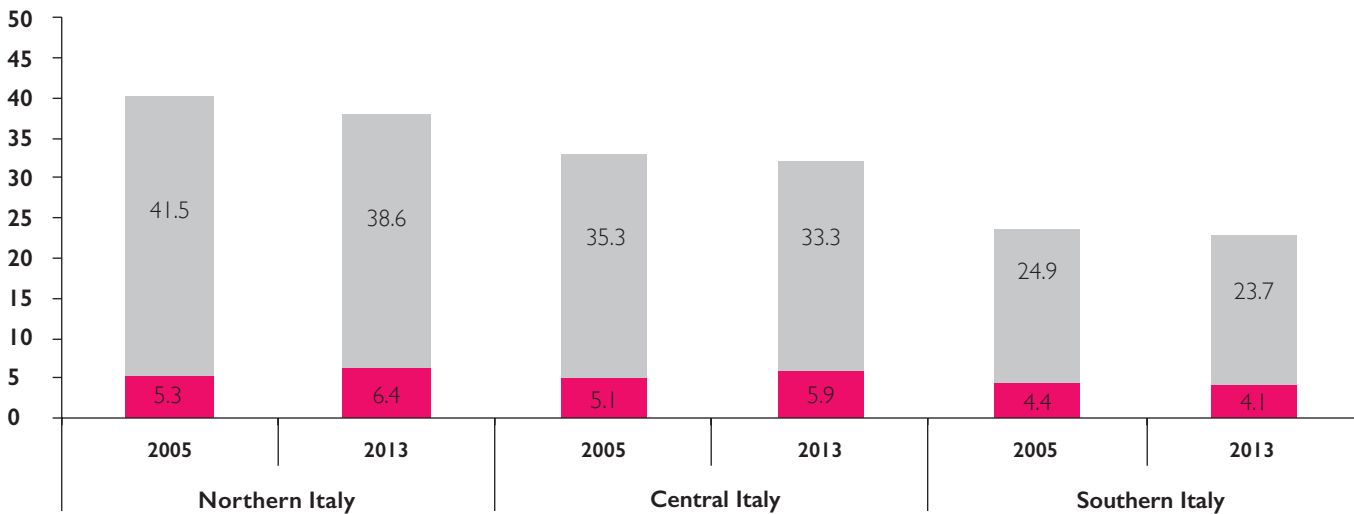
Source: Istat, July 2015



POPULATION 3 YEARS AND OLDER VISITING A DENTIST OR ORTHODONTIST AND GEOGRAPHICAL DISTRIBUTION.
Year 2005 and 2013 per 100 people with the same characteristics

	Last 12 months		Never visited a dentist	
	2005	2013	2005	2013
Northern Italy	47.0	44.5	6.7	6.2
Central Italy	43.4	38.9	8.7	6.7
Southern Italy	29.9	27.7	19.0	12.1

POPULATION 3 YEARS AND OLDER BY TYPE OF PROFESSIONAL TO WHICH THEY HAVE MADE A VISIT IN THE LAST 12 MONTHS AND GEOGRAPHICAL DISTRIBUTION.
Years 2005 and 2013, standardized rates per 100 people.



■ Independent-private dentist ■ Dentist from public or subsidized institution

Source: Istat, July 2015

Over half of the professionals (55.8%) expect the economic crisis to continue within the next year or so with 34.9% of dentists believing it will increase even further.

In conclusion, the Bocconi study asked, to a sample of 3,101 dentists, if they had to choose their profession again, would they choose to be a dentist? Among the respondents, 52.2% reported they would probably

or surely choose it again (31.1% probably and 21.1% for sure), while 34.1% would probably or surely not choose it with 13.8% not being sure. The most dissatisfied tend to be older dentists in solo-practices.

One last major issue is the fast aging of Italian population with a consequent increase in oral healthcare needs and a welfare state not enough supporting it. With a total population

of 60.7 million, people over 65 now represent 22.6% of the population, against an average of 18.9% in Europe. It is the highest figure in Europe. The age group 0-14 years is decreasing (11.7%), as is the fertility rate (1.35 child per woman - European average is 1.58) with an average age of the population at 44.7 years. According to studies, in spite of an increase in oral care needs among the elderly, the percentage of visits to the dentists decreases with increas-

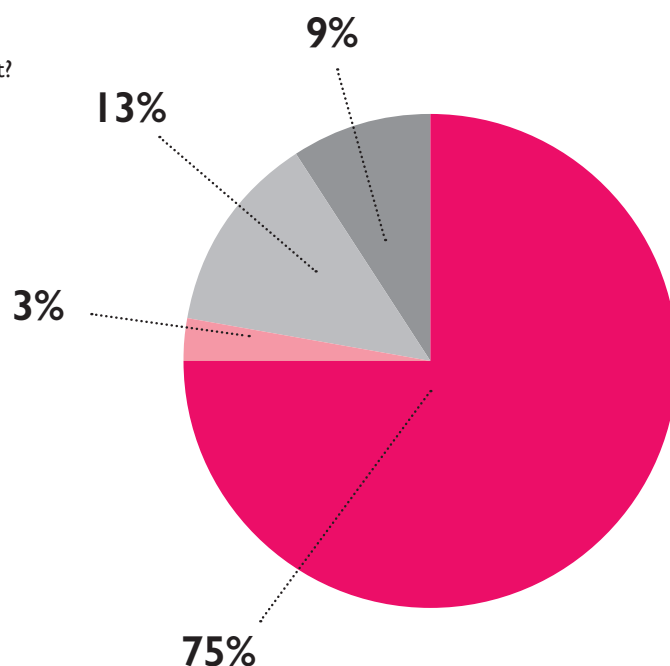
MARKET OVERVIEW

OPERATING MODE

With reference to your main dental practice, what kind of practice is it?

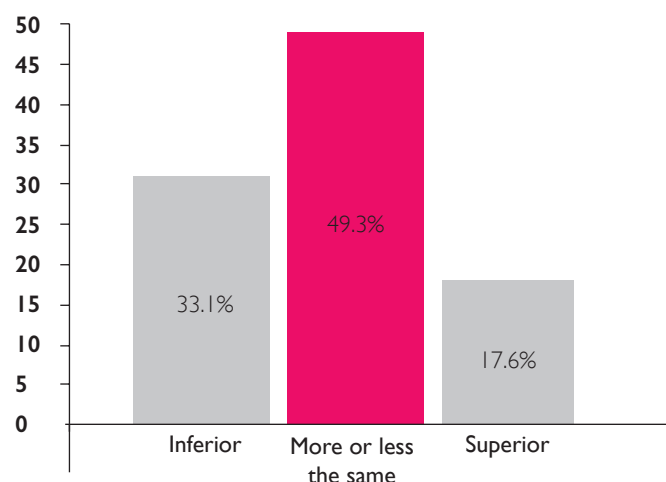
- Independent solo practice
- Corporation
- In association with other professionals
- Dental practice shared with other dentists

Sample: 3,101 respondents
Source: Bocconi Univ.



REVENUES

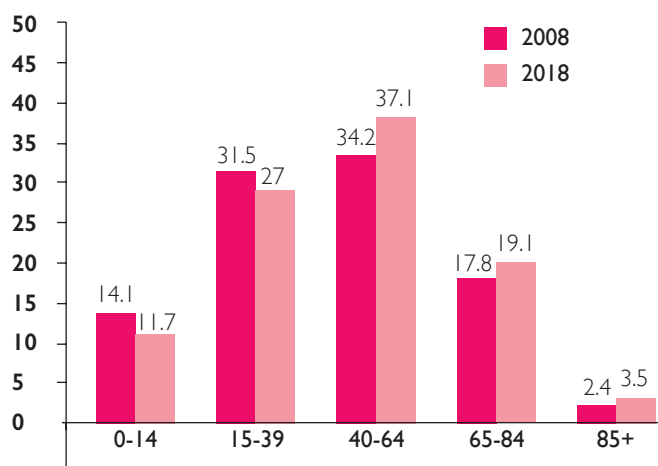
Based on the information you have today, could you indicate whether your practice revenues in 2015, compared to 2014, were roughly:



Question asked to dental practices owner/co-owners
Sample: 2,733 respondents
Source: Bocconi Univ.

RESIDENT POPULATION IN ITALY

(1st January 2008 – 1st January 2018)
(value in percentage)



Source: ISTAT, 2018

ing age, with 36.1% of over 65 years old visiting a dentist while only 29.2% over 75 do.

Only around 5-7% of dental care is provided within the National Health System completely free of charge with the remainder through co-payments and mainly out-of-pocket. The Italian National Institute of Statistics (ISTAT), in 2015, placed the dentist in the first place in the basket of needs for the Italian population. According to an ISTAT report in October 2017, 11.7% of patients 15 years and older used the public service, 86.9% turned to the private sector but over 80% of expenses are out-of-pocket.

Greater focus on prevention is a must

within Italian dentistry as ISTAT calculates that on the one hand the percentage of those who take care of their teeth decreases, today there are about 37 Italians every 100 (i.e. 63 Italians give up dental care) and on the other side there are those who still go to the dentist but less frequently.

Source:
Corso ODG "La salute orale – Il ruolo dei media per una cultura della prevenzione".
Tra i relatori: Dr. Michele Cassetta, giornalista odontoiatra, Docente A.C. Comunicazione

Medico-Paziente Università di Bologna, Dr.ssa Antonella Polimeni, Prof. Ordinario alla Sapienza, Dr. Enrico Gherlone, Prof. Ordinario San Raffaele di Milano, Presidente Collegio Docenti di Odontoiatria Seminar organized by the National Journalist Association, titled "Oral Health – The Role of the Media for a Culture of Prevention". Among the speakers, Dr. Michele Cassetta, dental journalist and A.C. Professor Doctor-Patient Communication, University of Bologna, Dr. Antonella Polimeni, Professor University of Rome "La Sapienza", Dr. Enrico Gherlone, Prof. San Raffaele of Milan, President of the Association of Teachers in Dentistry