

A Special Webinar from the ADA

How COVID-19 is Impacting Dental Practices and Patient Attitudes Toward Visiting the Dentist

August 5, 2020

Panelists



Introduction
Dr. Chad Gehani
President
ADA



Moderator
Dr. Kathy O'Loughlin
Executive Director
ADA



Marko Vujicic
Chief Economist & VP
ADA Health Policy Institute



Dr. Kirk Norbo
Chair
ADA COVID-19 Recovery
Task Force



Jon Last
President
Sports & Leisure Research
Group (in collaboration
with Engagious)



Dr. Nipa Thakkar
Private Practice Dentist
& Faculty, Penn Dental
Medicine



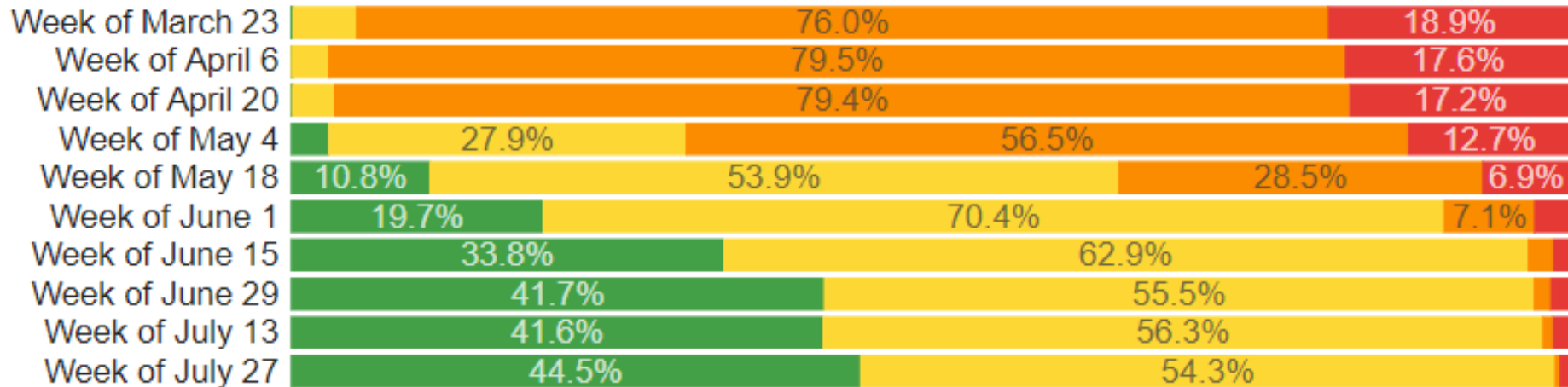
Michael Graham
Senior Vice President
Government and Public Affairs
ADA

HPI Economic Impact of COVID-19 Tracking Poll

- Bi-weekly poll beginning March 23.
- Core measures: Status of your practice, volume of patients and collections, status of dental practice staff.
- “Question(s) of the Week”.
- Sent to dentists in private practice who agreed to be part of ongoing panel.
- Nationally representative sample of about 4,000 dentists. State level data available for many states.
- Links to reports and interactive data dashboard available at www.ada.org/virus.

Core Questions

What is the current status of your dental practice?



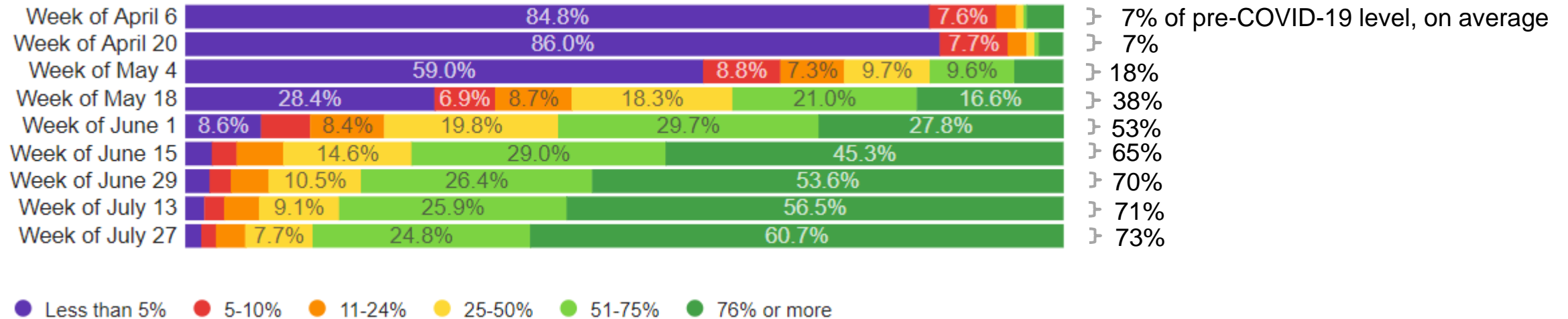
- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

Insight: As of week of July 13, 99% of dental practices in the U.S. were open. This was the about the same as two weeks prior.

Core Questions

How does this week compare to what is typical in your practice, in terms of... *

Total Patient Volume

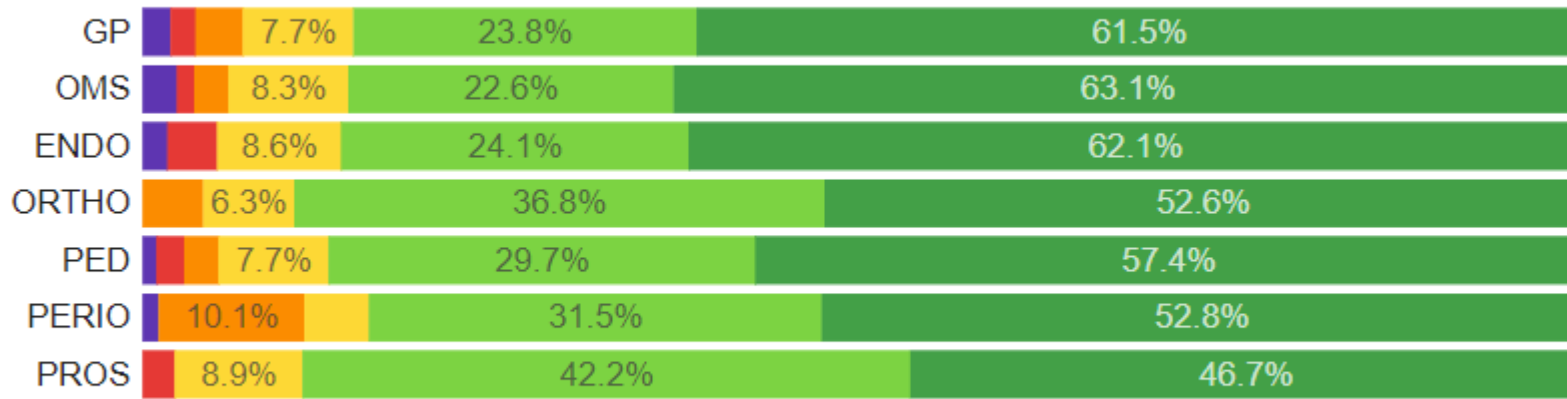


Insight: Nationally, patient volume is leveling off. Patient volume was estimated to be 73% of pre-COVID-19 levels for the week of July 27.

Core Questions

How does this week compare to what is typical in your practice, in terms of... *

Total Patient Volume



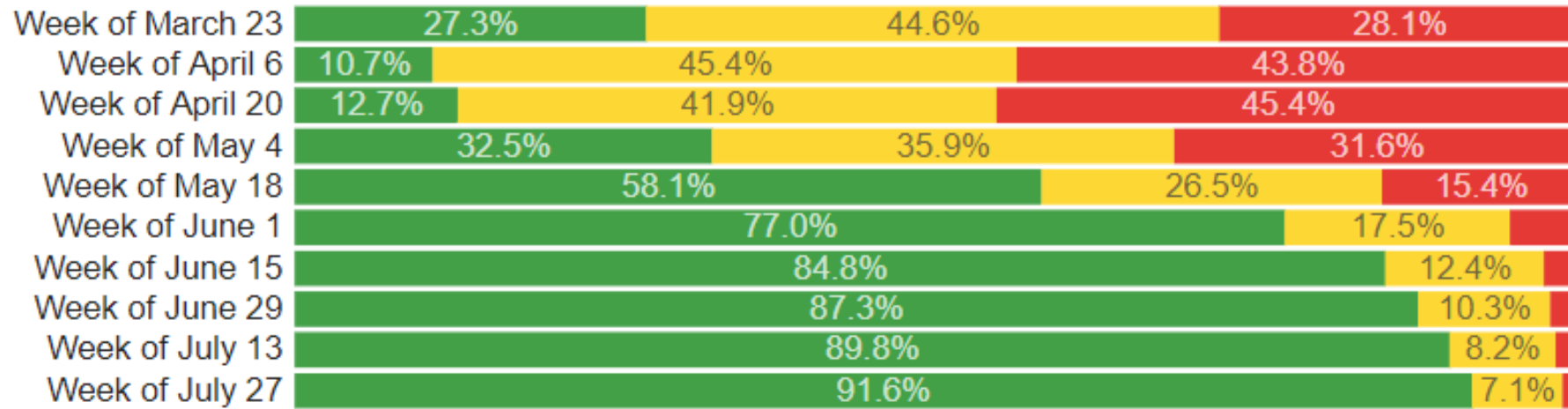
● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

Insight: There are variations in patient volume by specialty.

Core Questions

Is your dental practice paying staff this week?

Insight: Dental practices are stabilizing at roughly 90% of pre-COVID-19 staffing levels.

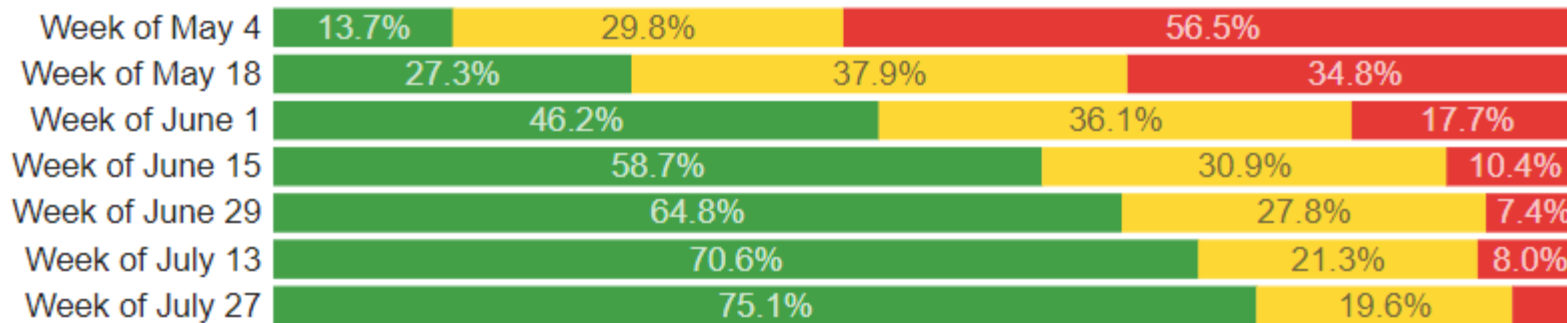


● Yes, fully ● Yes, partially ● Not paying any staff

Core Questions

PAY STATUS OF ASSOCIATES, EMPLOYEES, AND INDEPENDENT CONTRACTORS

[If non-owner dentist] Are YOU being paid this week?

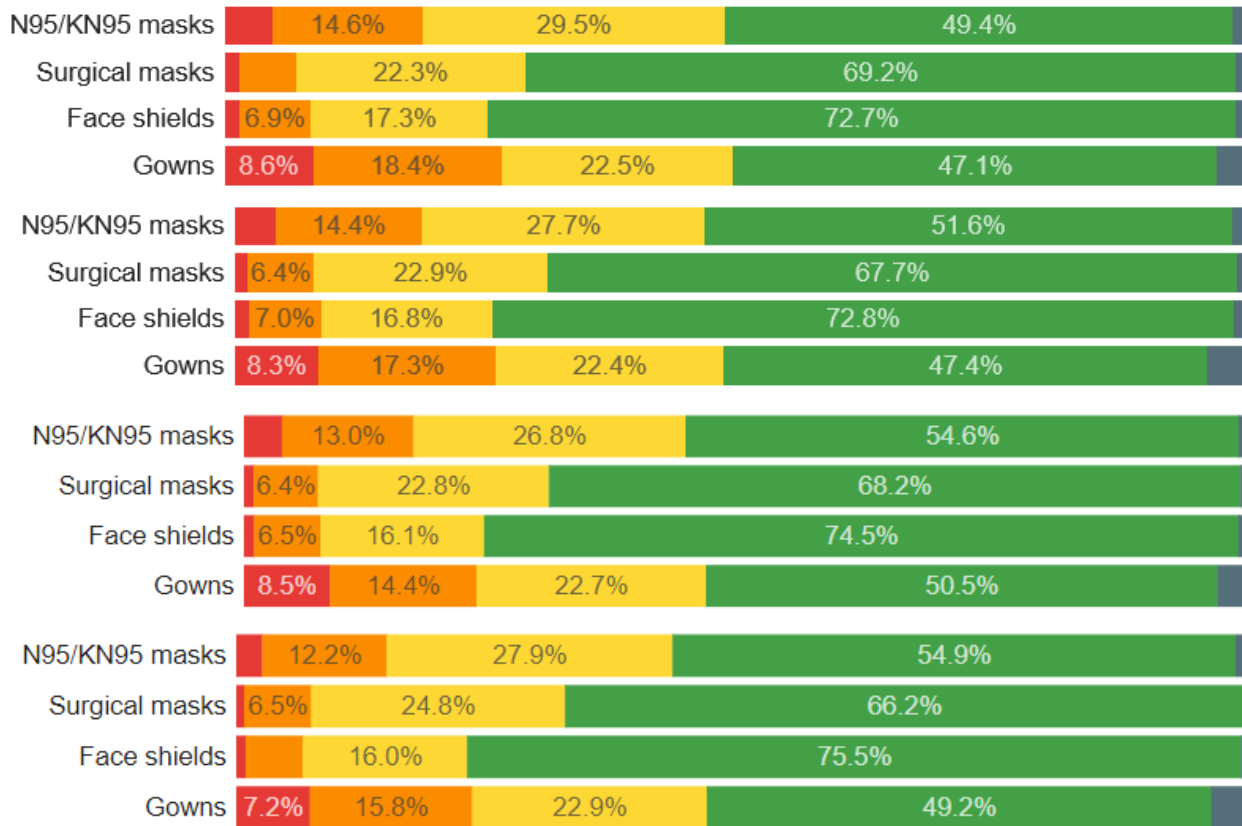


● Yes, fully ● Yes, partially ● Not being paid at all

Insight: Employee dentists are among the last to be hired back. About 75% of employee dentists are now being paid fully and another 20% partially.

Core Questions

How many days' worth of the following PPE does your practice have at this time?



Week of June 15

Week of June 29

Week of July 13

Week of July 27

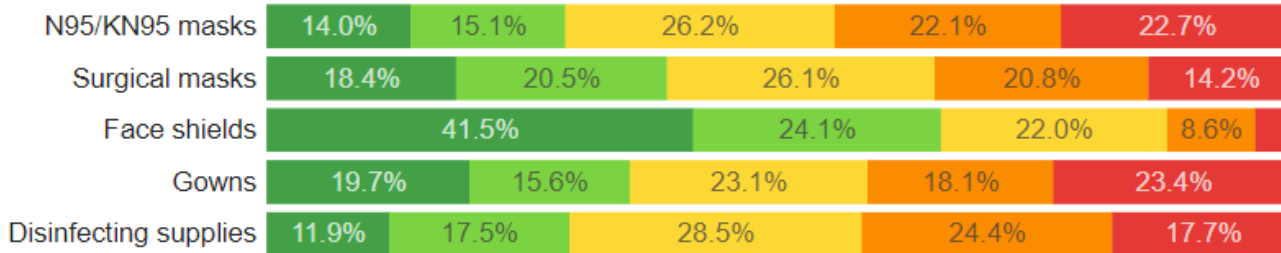
Insight: PPE availability in dental practices remains stable. For now.

● 0 days ● 1 to 7 days ● 8 to 14 days ● More than 14 days ● Not sure

Question of the Week

Using the scale below, please describe your practice's experience obtaining each of the following types of PPE and supplies over the past two weeks.

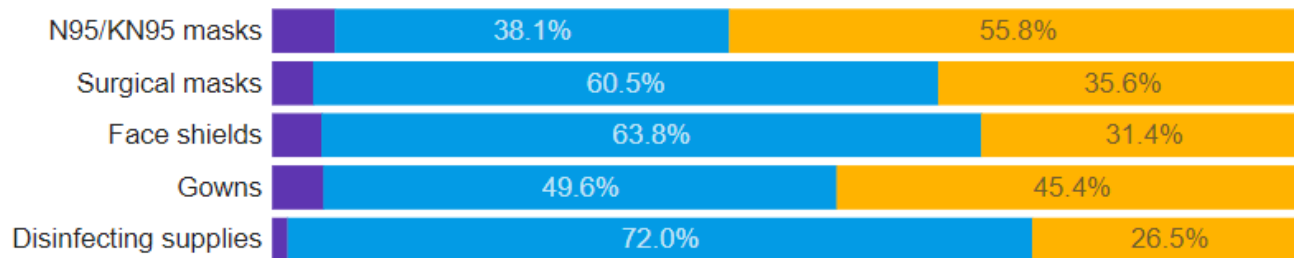
All respondents



● 1 - Not difficult ● 2 ● 3 ● 4 ● 5 - Very difficult

[If 4 or 5 selected in previous question] You indicated that one or more types of PPE or supplies have been difficult to obtain. Please indicate the primary reason why.

All respondents

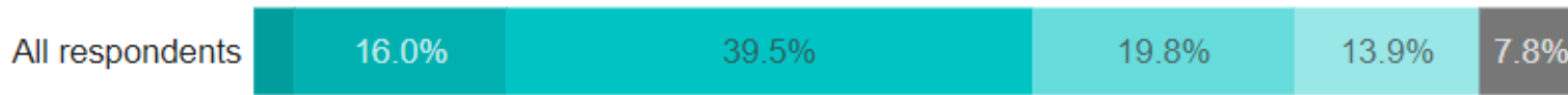


● Primarily cost prohibitive ● Primarily inadequate supply ● Both cost prohibitive and inadequate supply

Insight: N95/KN95 masks and gowns are the most difficult PPE supplies to obtain.

Question of the Week

Thinking ahead to your practice's expected patient volume in **September and October**, how do you expect it will compare to this week? *It will be...*



- Much higher in Sept/Oct
- A little higher in Sept/Oct
- About the same in Sept/Oct
- A little lower in Sept/Oct
- Much lower in Sept/Oct
- Not sure

Insight: About 1/3 of practices are expecting lower patient volumes in September and October. About 1/5 are expecting higher patient volumes. It is unclear at this stage how significant the “fall lull” might be.

Insights from Consumer Polling

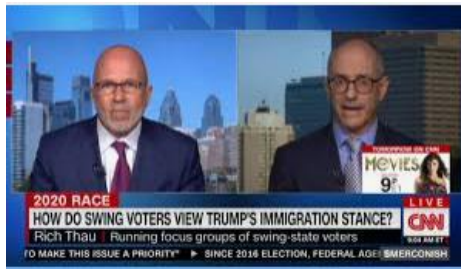


AMERICA STANDS AT AN INFLECTION POINT.

Consumers are now more concerned about the economy than the health crisis. What does that mean as our society attempts to go back to normal? We just completed the fourth wave of a twice-monthly tracking study that listens to the voice of the consumer.

Through surveys, in-depth interviews, social media analyses, and online dial tests, we address a variety of timely questions:

- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**



The ADA has partnered with the 'Back-to-Normal Barometer' to explore consumer sentiment toward visiting the dentist during the pandemic.

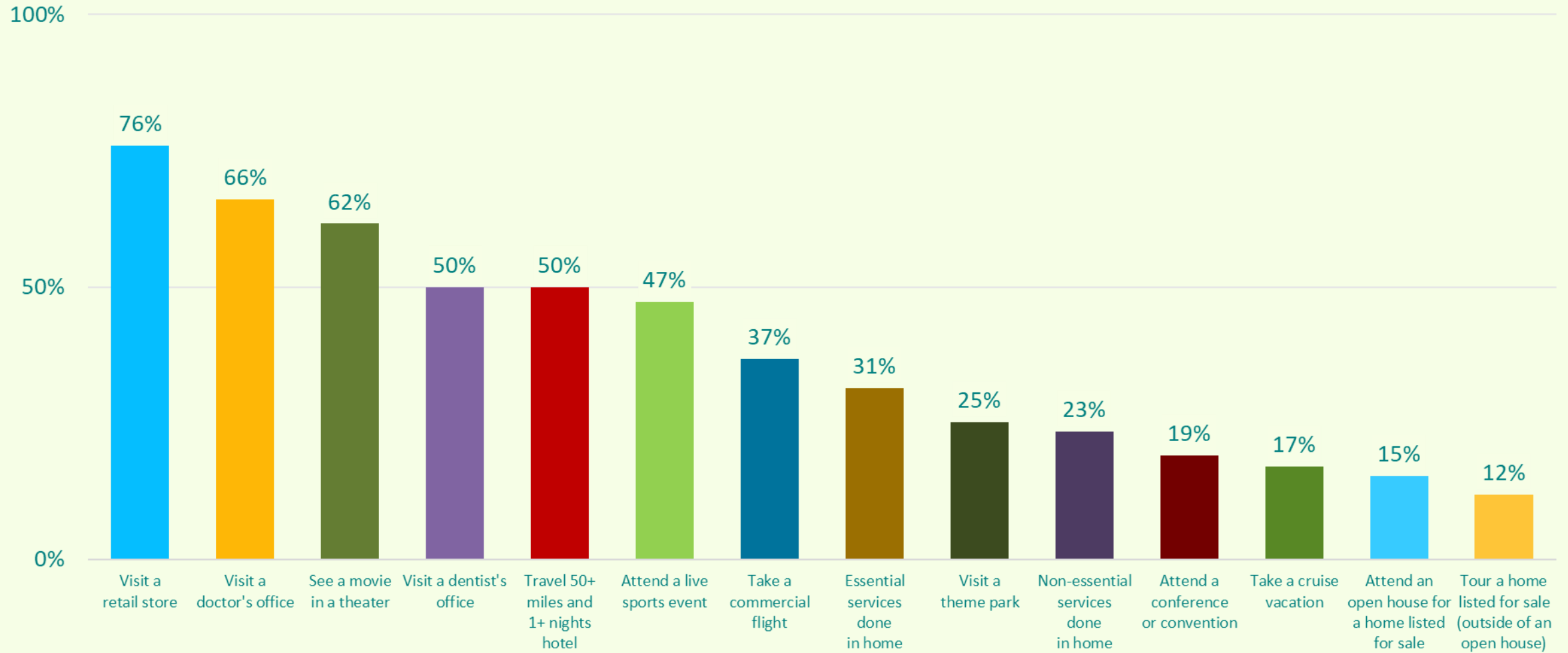
THE CHALLENGING QUEST FOR NORMALCY

Public opinion insights from the July 22, 2020
“Back-to-Normal Barometer”

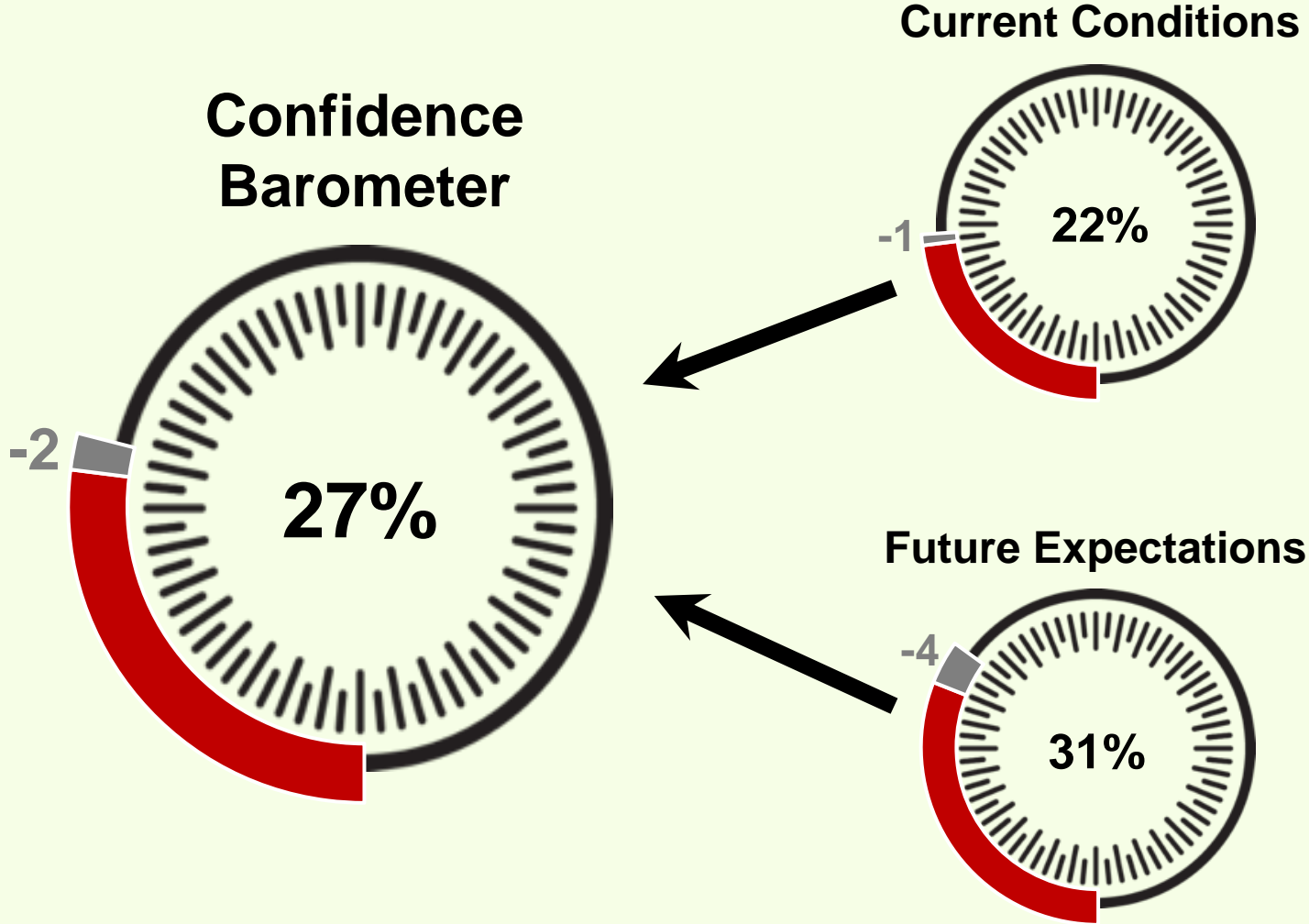
RON BONJEAN, PARTNER, ROKK SOLUTIONS
RICH THAU, PRESIDENT OF ENGAGIOUS
JON LAST, PRESIDENT OF SPORTS & LEISURE RESEARCH GROUP
GINA DERICKSON, RESEARCH DIRECTOR OF ENGAGIOUS

CONTEXT: RESPONDENTS ACTIVELY ENGAGE

Percent who have participated in this activity in the past 12 months



WAVE 8 CONFIDENCE BACK TO EARLY APRIL'S WAVE 1



Wave 7: n=598, Back to Normal Barometer – July 8, 2020
Wave 8: n=576, Back to Normal Barometer – July 22, 2020

CONFIDENCE WEAKER IN COVID-HEAVY STATES

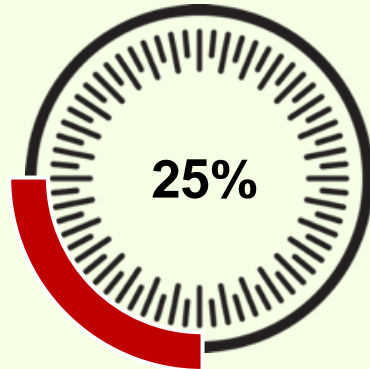
“COVID-19 Heavy” states are slightly less confident in the country’s current status and prospects for the future.

Confidence Barometer

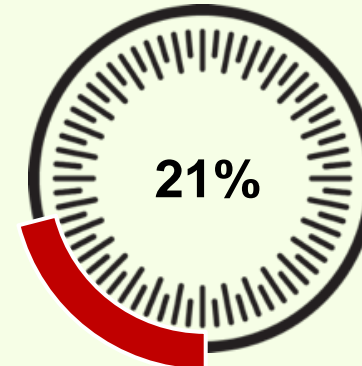
Current Conditions

Future Expectations

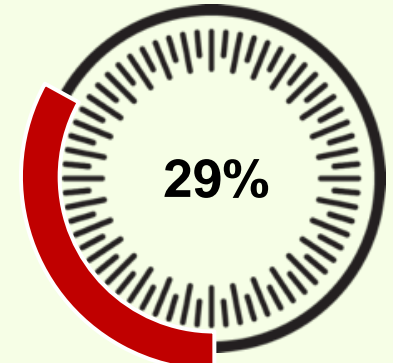
COVID-19 Heavy



25%

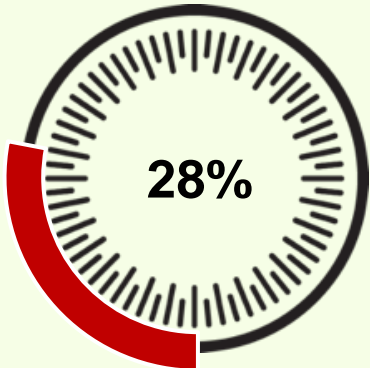


21%

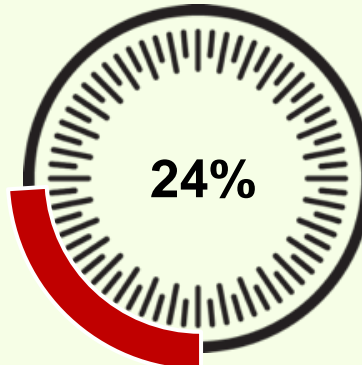


29%

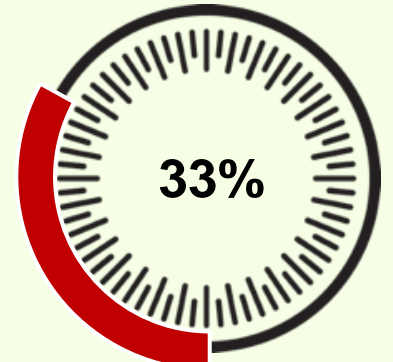
COVID-19 Light



28%



24%



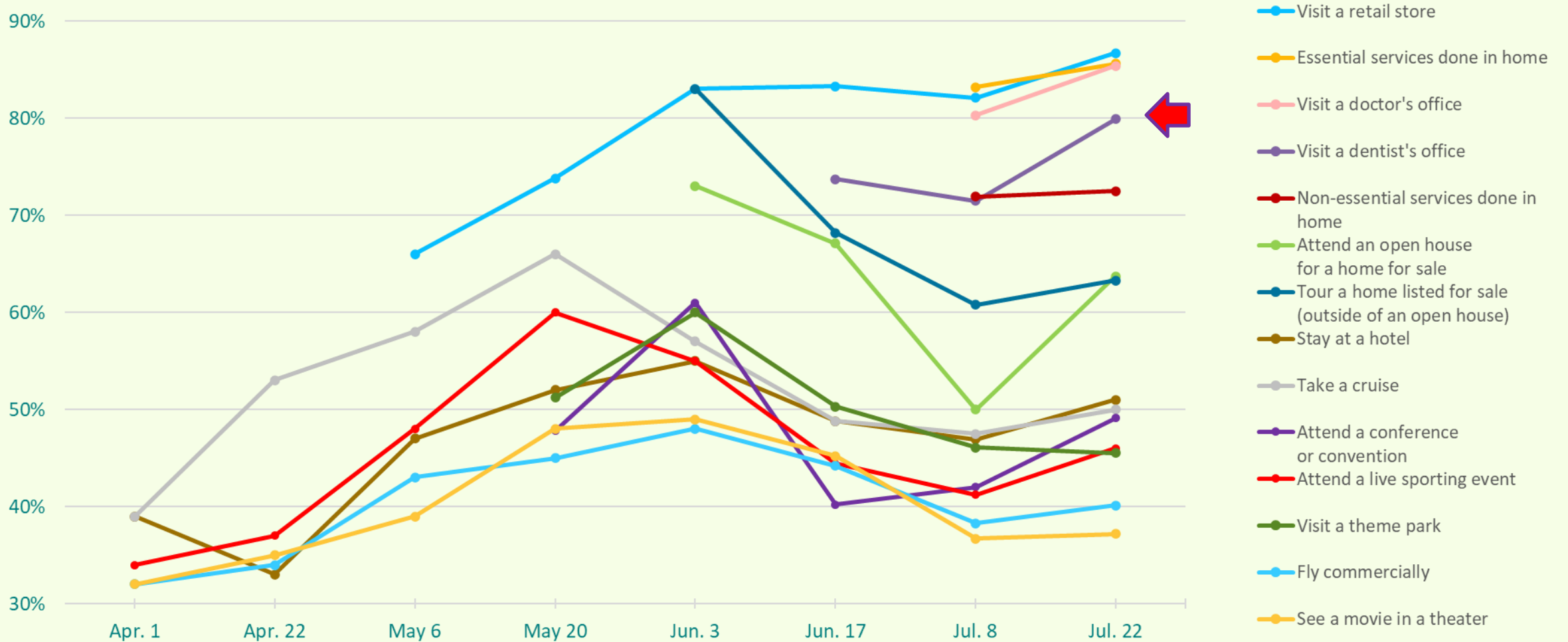
33%

Wave 7: n=598, Back to Normal Barometer – July 8, 2020

Wave 8: n=576, Back to Normal Barometer – July 22, 2020

SLIGHT REBOUND IN % WHO WOULD RETURN TOMORROW

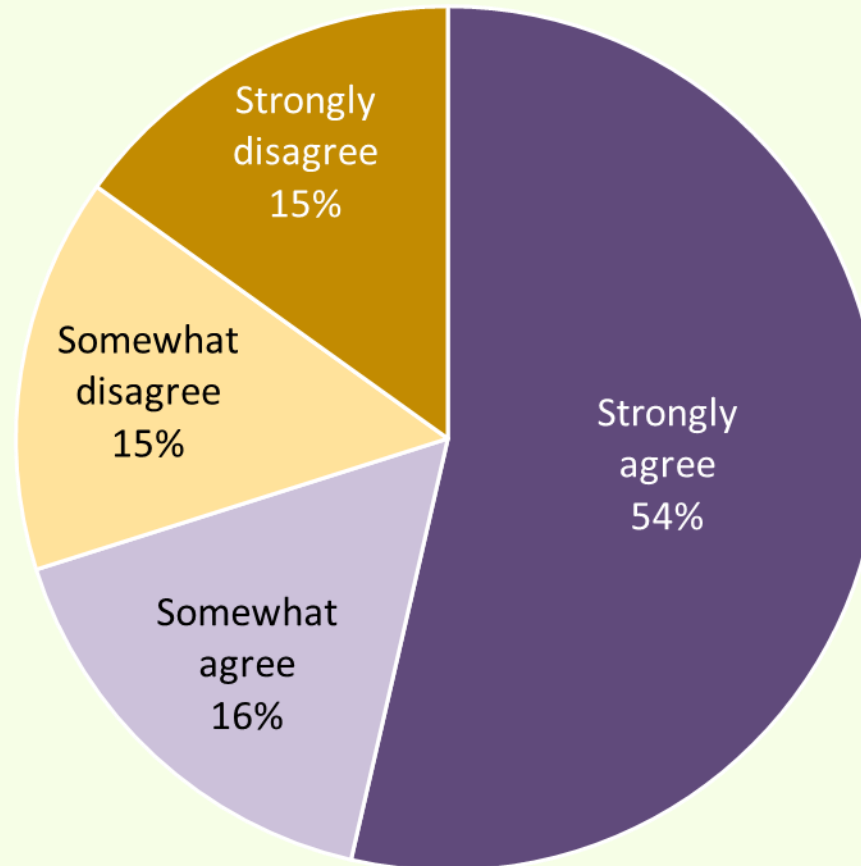
Are you currently willing to engage in the following activities, without hesitation?



Vaccines

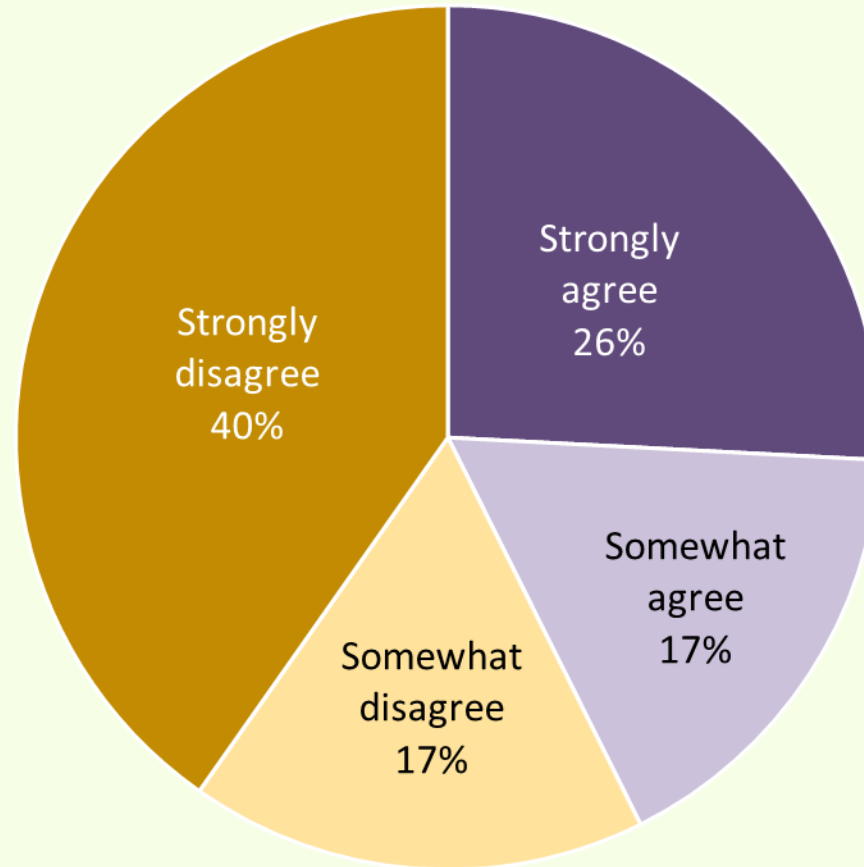
7 IN 10 PLAN TO BE VACCINATED

I will definitely get a COVID 19 vaccine when it is available.



ONE IN FOUR WOULD GET INOCULATED BY AIRLINE/HOTEL

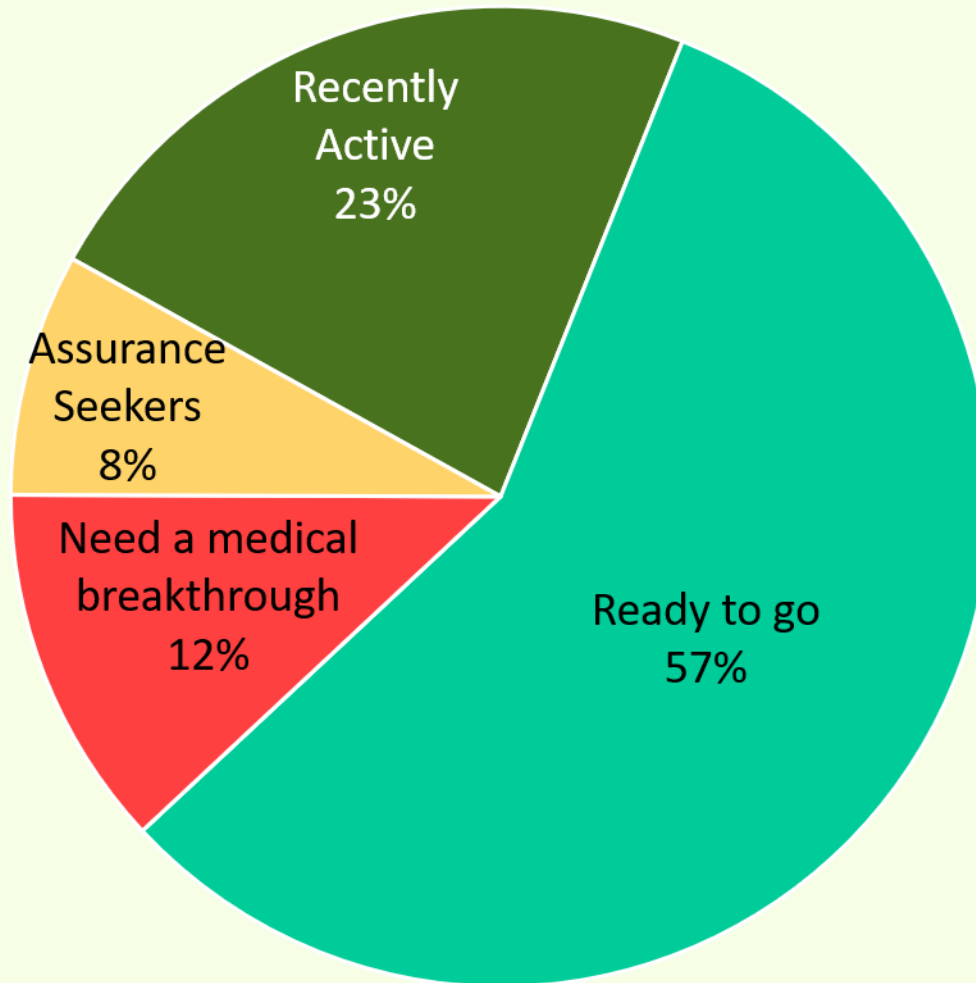
Once a COVID 19 vaccine were available, I would be interested in getting one through a hotel or airline provider.



Dental Industry

READY OR NOT: VISIT A DENTIST'S OFFICE

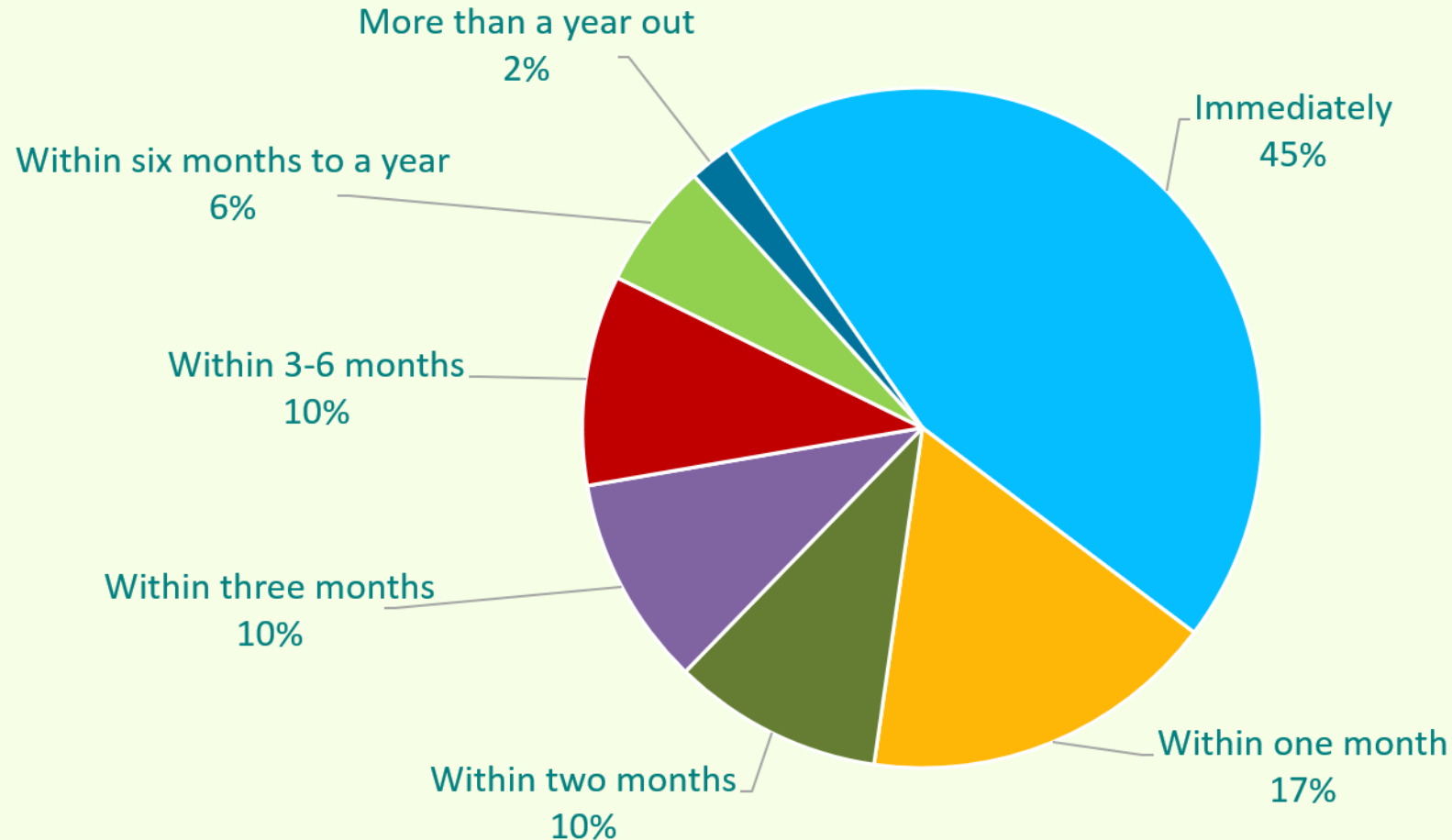
Which of the following conditions is closest to your current point of view... Visit a dentist's office



- Recently Active
- Ready to go
- I would not be comfortable resuming this activity unless there was an approved COVID-19 vaccine and/or a proven medical protocol to mitigate and remedy the effects of the virus.
- I would be willing to resume this activity, as long as a combination of local or national medical authorities, local or national government officials, and/or the location I am visiting provided assurances it is safe to do so.

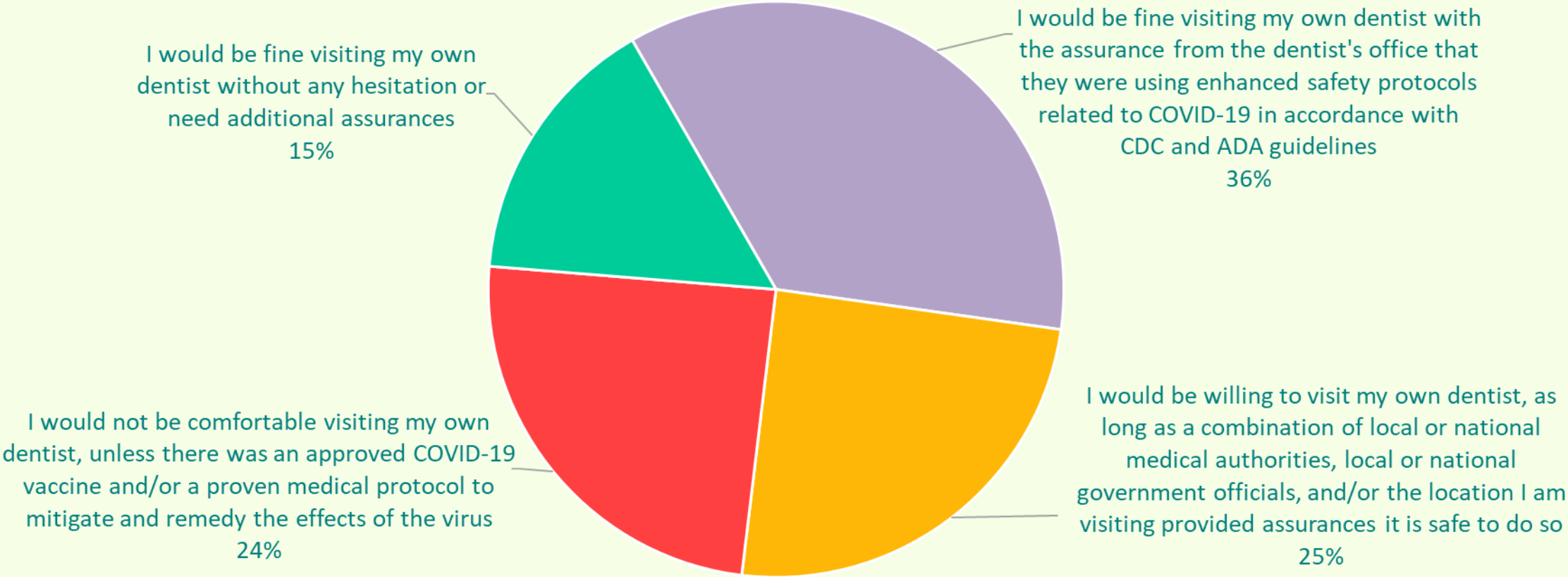
WITH ASSURANCES, 82% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next... Visit a dentist's office?



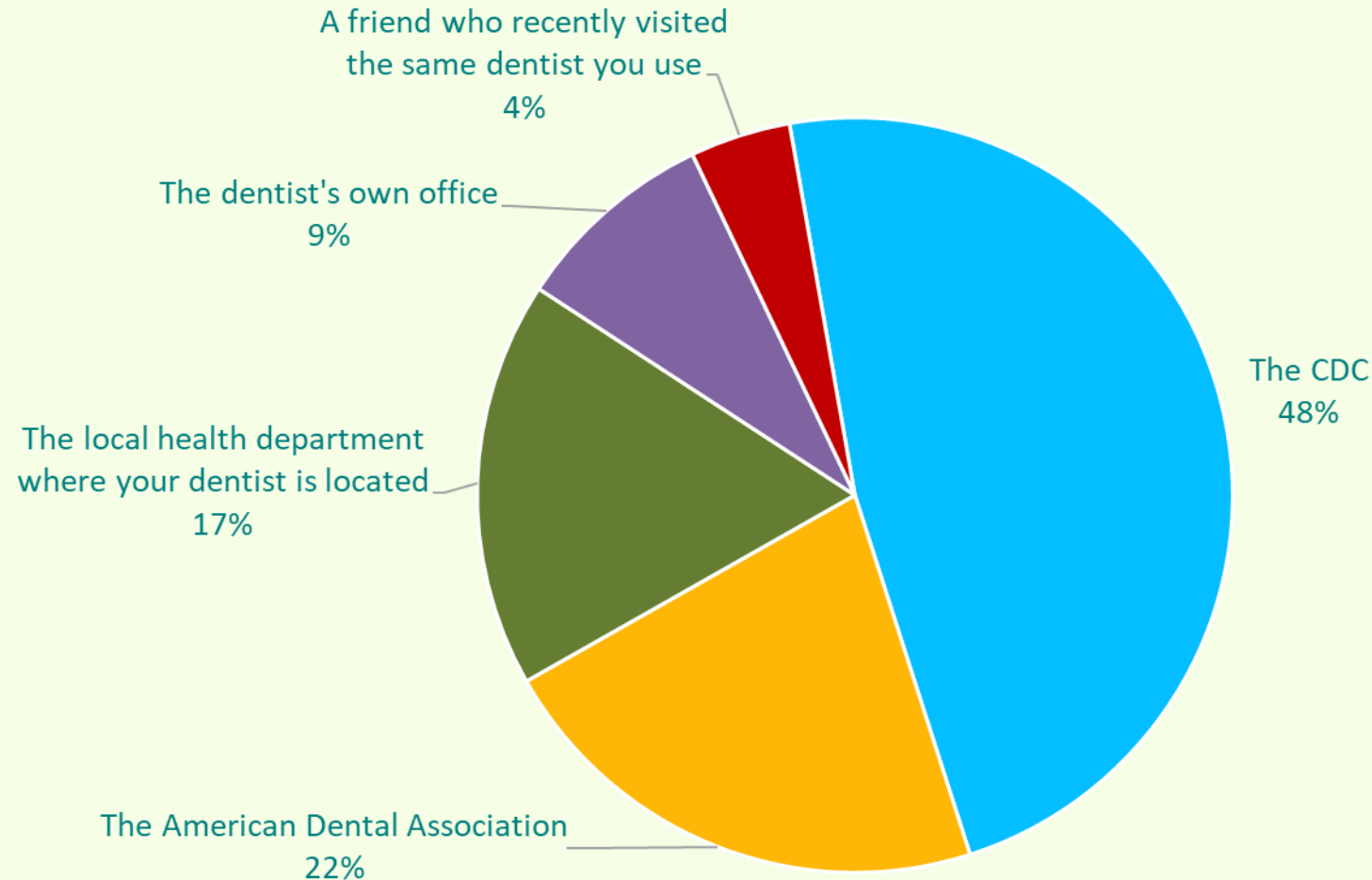
LOCAL DENTAL-COVID CASES WOULD NOT IMPEDE VISITS

Let's assume that you became aware of a situation where someone in your area was confirmed to have contracted COVID-19 from a visit to a dental office that you were not personally a patient of. Which of the following best reflects your willingness to visit your own dentist?



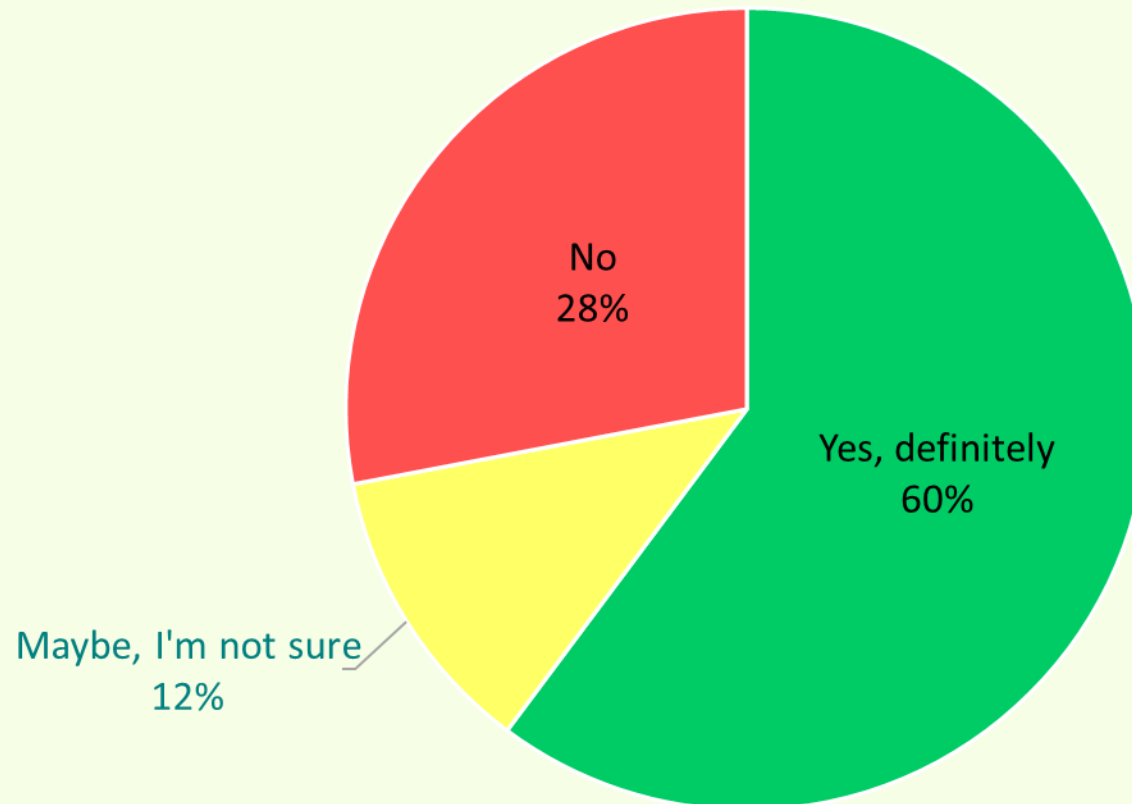
CDC AND ADA MOST TRUSTED BY ASSURANCE-SEEKERS TO ACCEPT DENTAL VISITS ARE SAFE

Which of the following entities would you trust the most if that entity declared it is safe to visit the dentist?



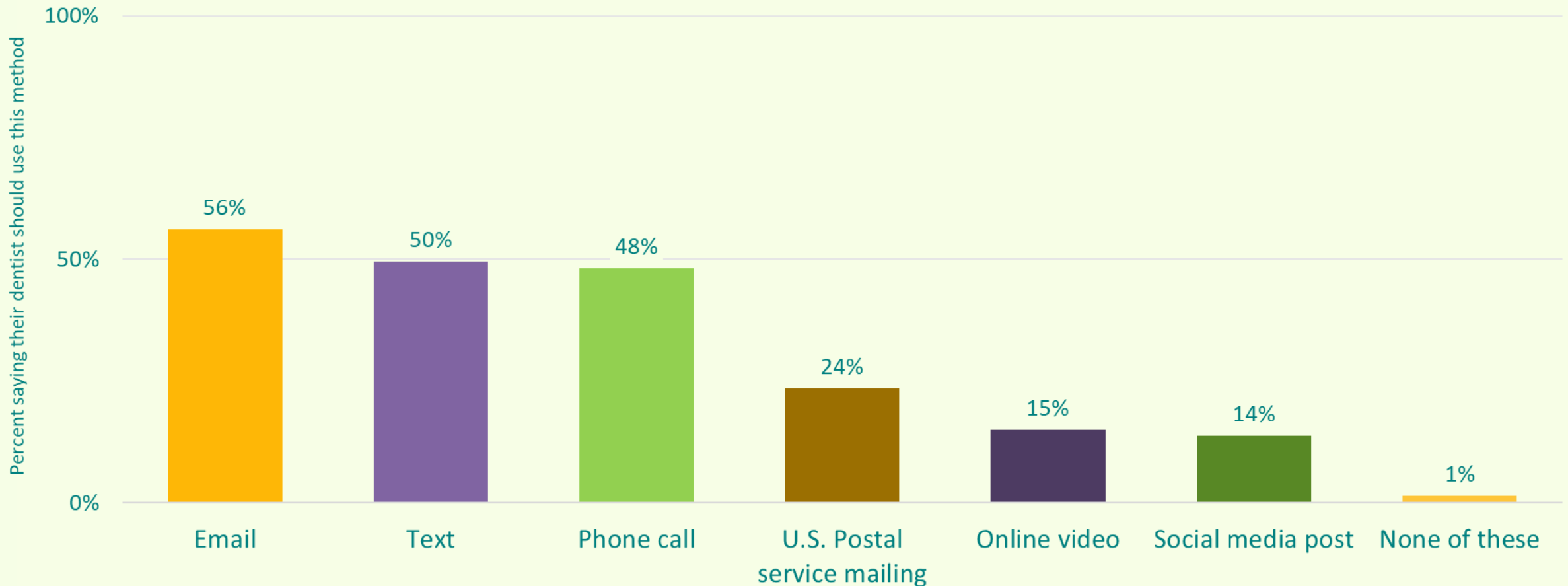
3/5 HAVE HEARD FROM THEIR DENTISTS ABOUT OFFICE HEALTH

Since the pandemic started, have you received any message about dental office health and safety from your own dentist?



EMAIL, TEXT & PHONE CALLS ARE BEST WAY TO REACH PATIENTS

If your dentist wanted not only to convey an important message to you about dental office health and safety, but also be confident you saw it, which form of communication should they use?



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Advisory Task Force on Dental Practice Recovery

- Provide oversight and direction on development of tools and guidance for dental offices:
 - ADA Return to Work Interim Guidance Toolkit
 - ADA COVID-19 Hazard Assessment and Checklist
- Future topics:
 - Environmental controls
 - Updating existing content
 - Monitoring new developments and responding as necessary
- Dentistry Is Essential Health Care

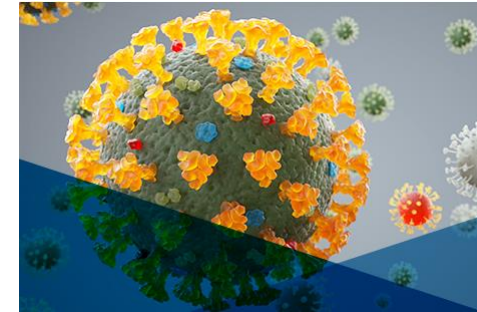
Government and Public Affairs

- Fought for passage of an SBA Paycheck Protection Program (PPP) loan program (\$349 billion) and the Economic Injury Disaster Loan (EIDL) advance that provides grants of up to \$10,000.
- Lobbied FEMA to allow dentists to receive 1.5 million KN95 masks to aide in reopening of dental offices.
- Advocated for HHS to release provider relief funding to dentists and fought to extend the deadline twice for dentists to apply.
- Worked to secure a Department of Labor (DOL) small business exemption from paid leave and Family and Medical Leave Act (FMLA) provisions of the CARES Act.
- Worked to relieve dentists from paying federal student loans for 6 months, without accumulating interest.
- Engaged more than 150,000 dentists to send nearly 600,000 emails to Capitol Hill during the coronavirus deliberations via grassroots action alerts.

For More Details...



ADA American Dental Association®



[ADA.org/HPI](https://ada.org/HPI)

hpi@ada.org

ADA Coronavirus (COVID-19) Center for Dentists

[ADA.org/virus](https://ada.org/virus)