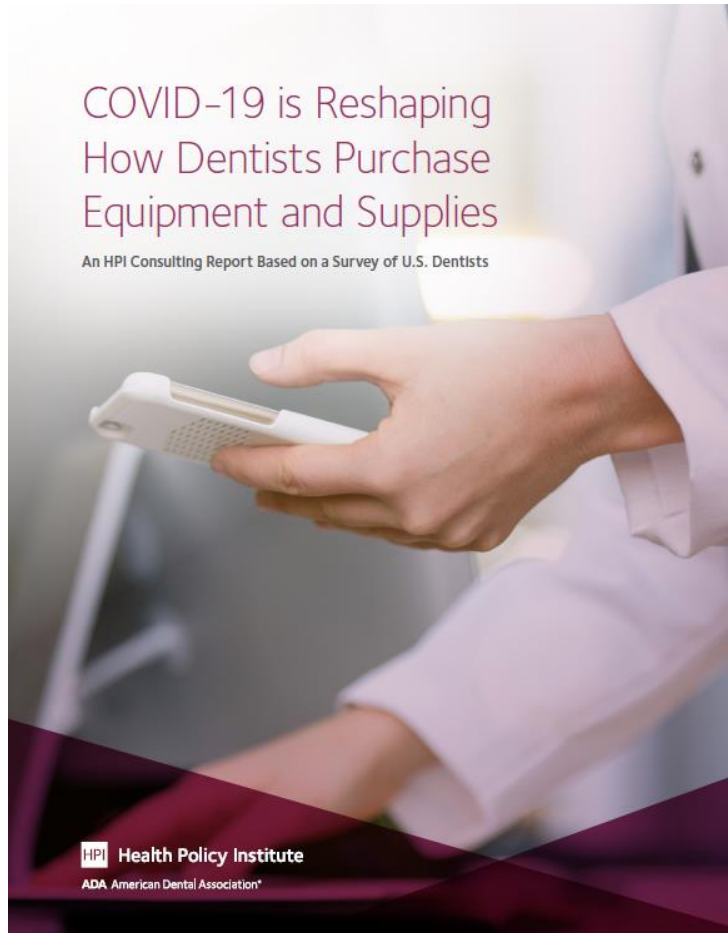


The Impact of COVID-19 on the Dental Care Sector

Insights from Data for the Week of November 30th

New HPI Consulting Report



This 150-page report provides the dental industry with up-to-date insights into the purchasing habits and preferences of dentists. Highlights include:

- *How dentists' approach to shopping for supplies has changed since the pandemic began.*
- *Measures dentists have taken – or might take in the future – to help maintain the financial sustainability of their dental practices.*
- *Views about in-person sales rep visits before and during the pandemic.*
- *Dentists' views on what manufacturers and distributors can do to help them recover and adapt to a new normal.*

Purchase report at www.ada.org/hpi

Today



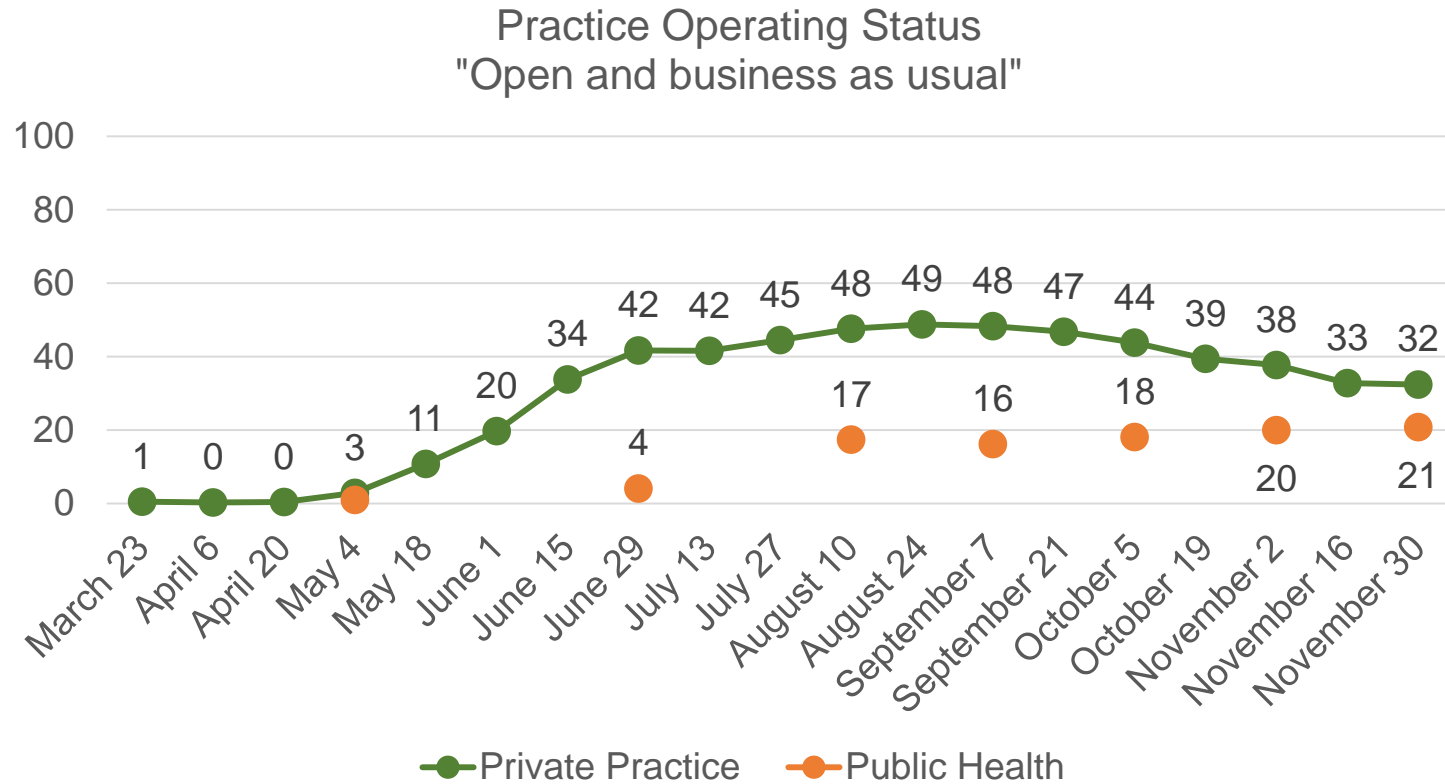
1. *Update on the latest data on dental sector recovery – week of November 30th.*
2. *'Question of the Week' data on PPE pricing and use of distributors and disenrollment from Medicaid programs.*
3. *The latest consumer sentiment data related to dental visits.*

HPI Impact of COVID-19 Tracking Poll

- Bi-weekly poll of private practice dentists beginning March 23rd. Public health dentists have been polled on a monthly basis.
- Core measures: Status of your practice, volume of patients, PPE supply.
- “Question(s) of the Week”.
- Nationally representative sample of about 3,000 dentists. State level data is available for many states.
- Links to reports and interactive data dashboard available at www.ada.org/hpi.

Core Questions

What is the current status of your dental practice?

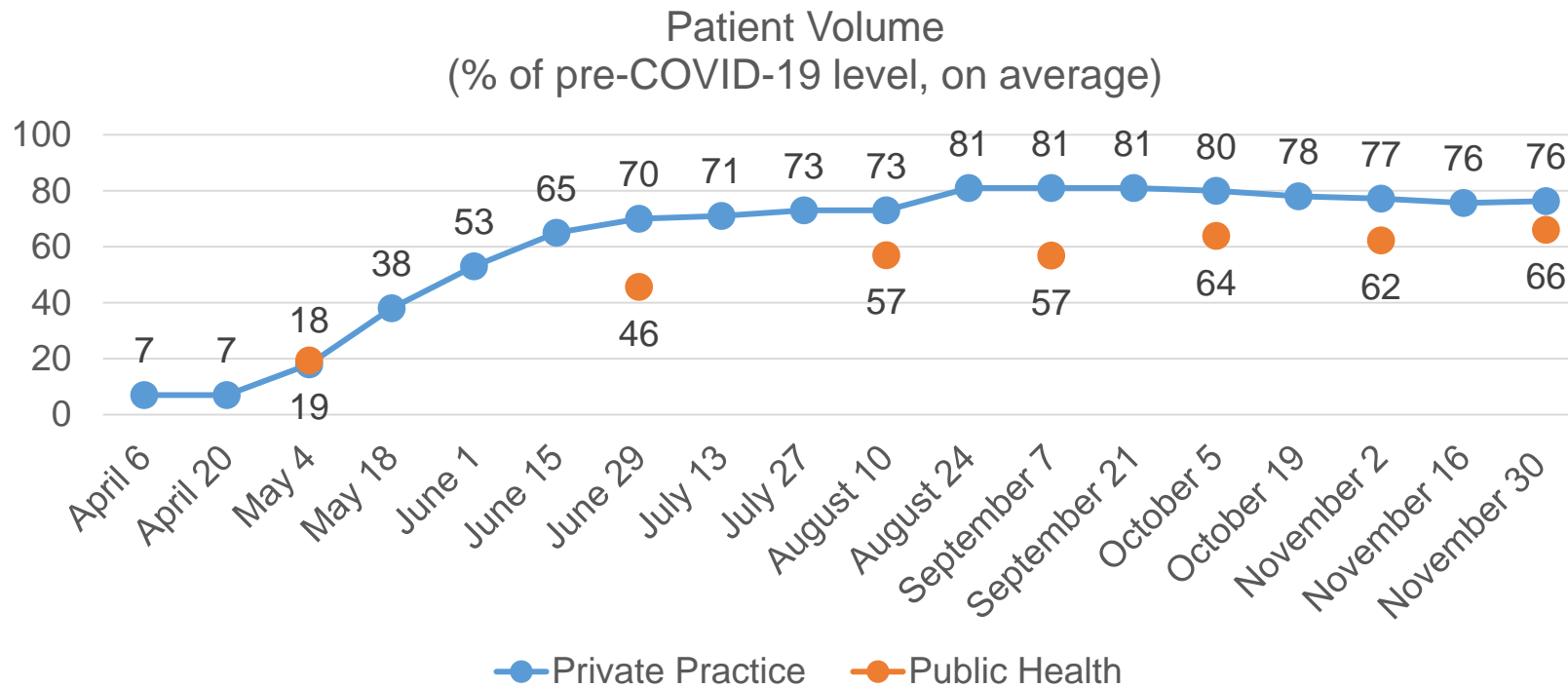


Insight: As of the week of November 30th, 99% of dental practices in the U.S. were open. About one-third of practices reported "business as usual" in terms of patient volume, compared to 21% in public health settings.

Core Questions

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

Total Patient Volume



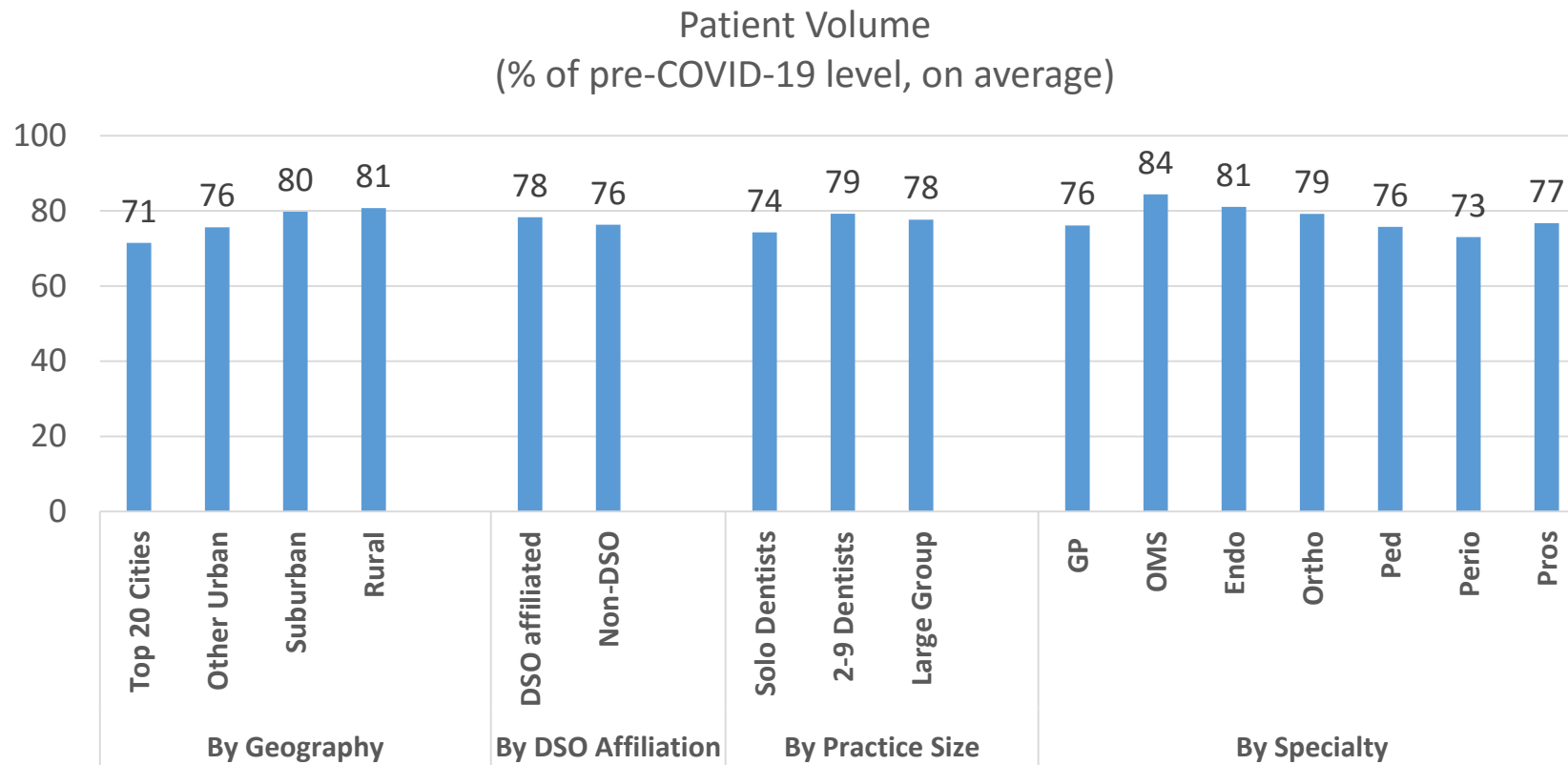
Insight: Patient volume in private practices was at 76% of pre-COVID-19 levels as of the week of November 30th.

Patient volume in public health settings continues to trail behind that of private practices, and was at 66% of pre-COVID-19 levels as of the week of November 30th.

Core Questions

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

Total Patient Volume



Insight: Patient volume varies to some extent by geography, DSO affiliation, practice size, and specialty.

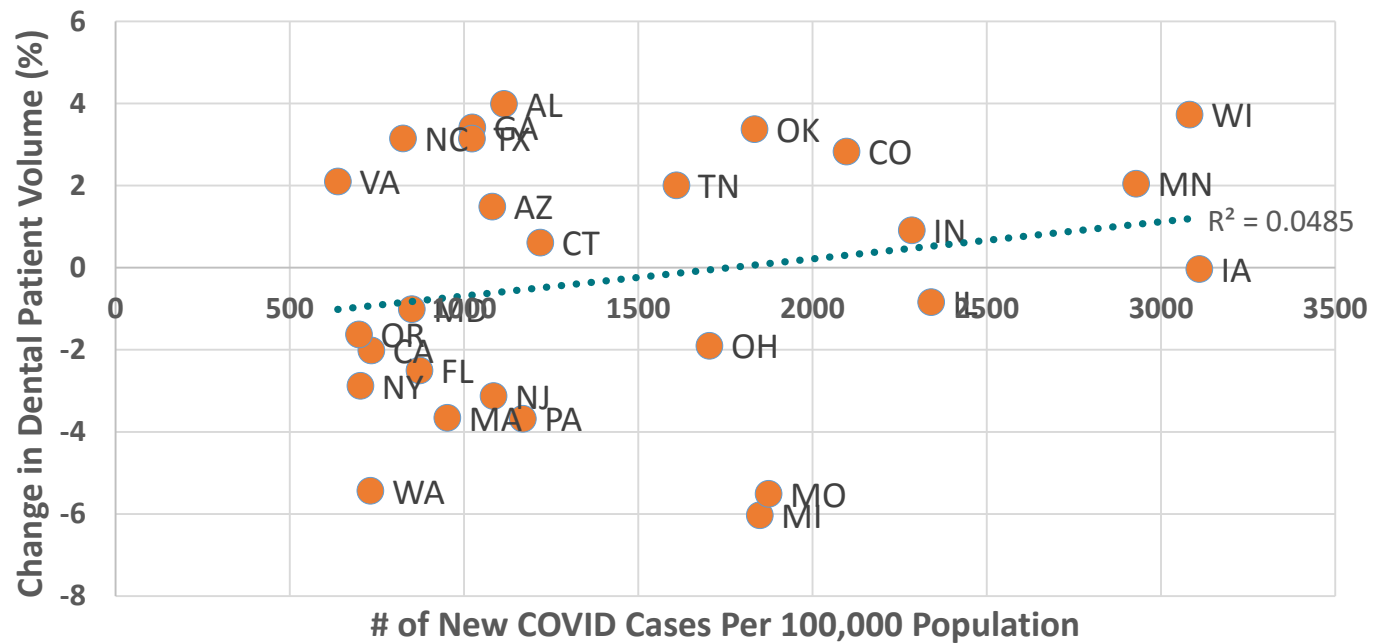
The highest patient volumes as of the week of November 30th were reported by rural and suburban dentists, group practices, and oral surgeons, endodontists, and orthodontists.

COVID-19 Cases and Patient Volume

Is Dental Patient Volume Correlated with the Number of COVID-19 Cases among the Population?

(excluding states with <30 responses)

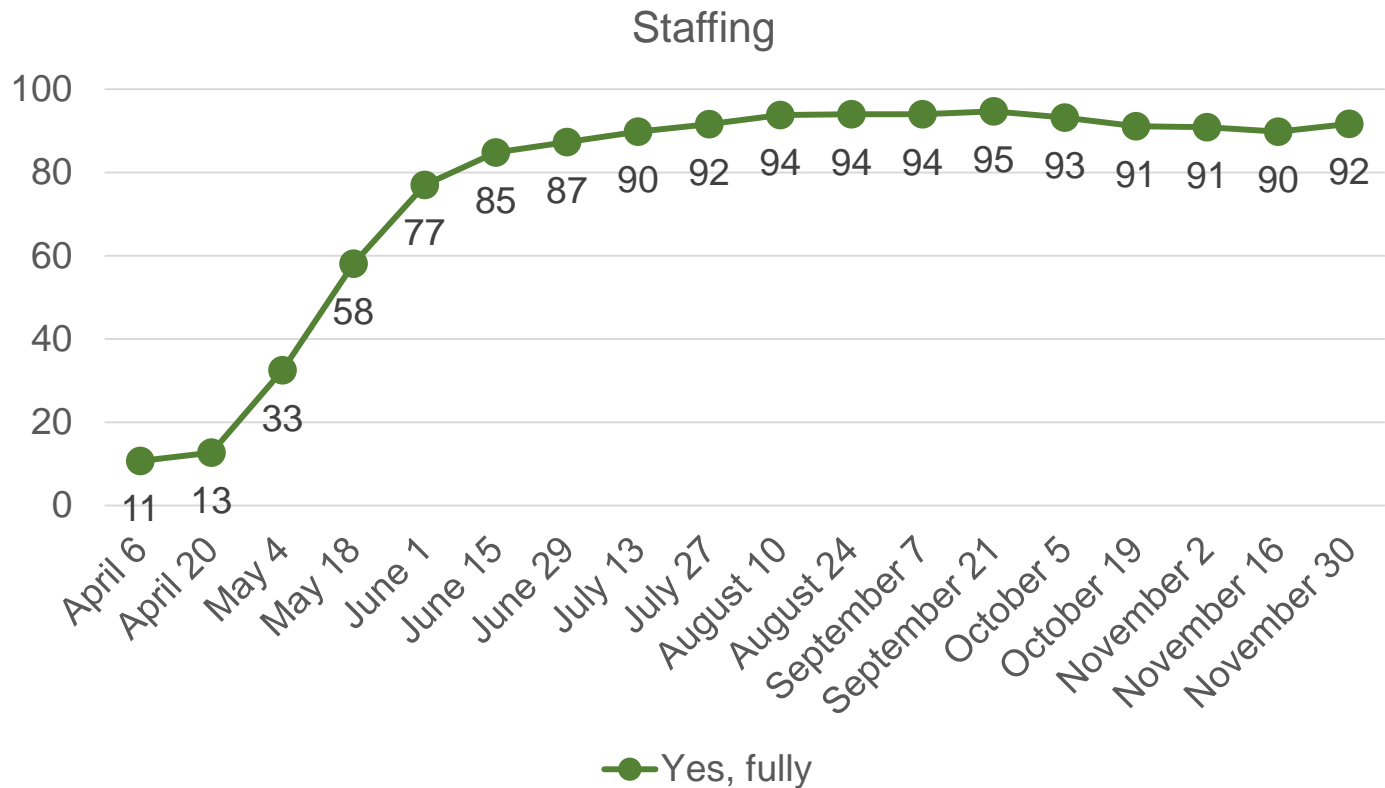
November 2 - 30, 2020



Insight: There is no relationship between COVID-19 cases and patient volume at the state level.

Core Questions

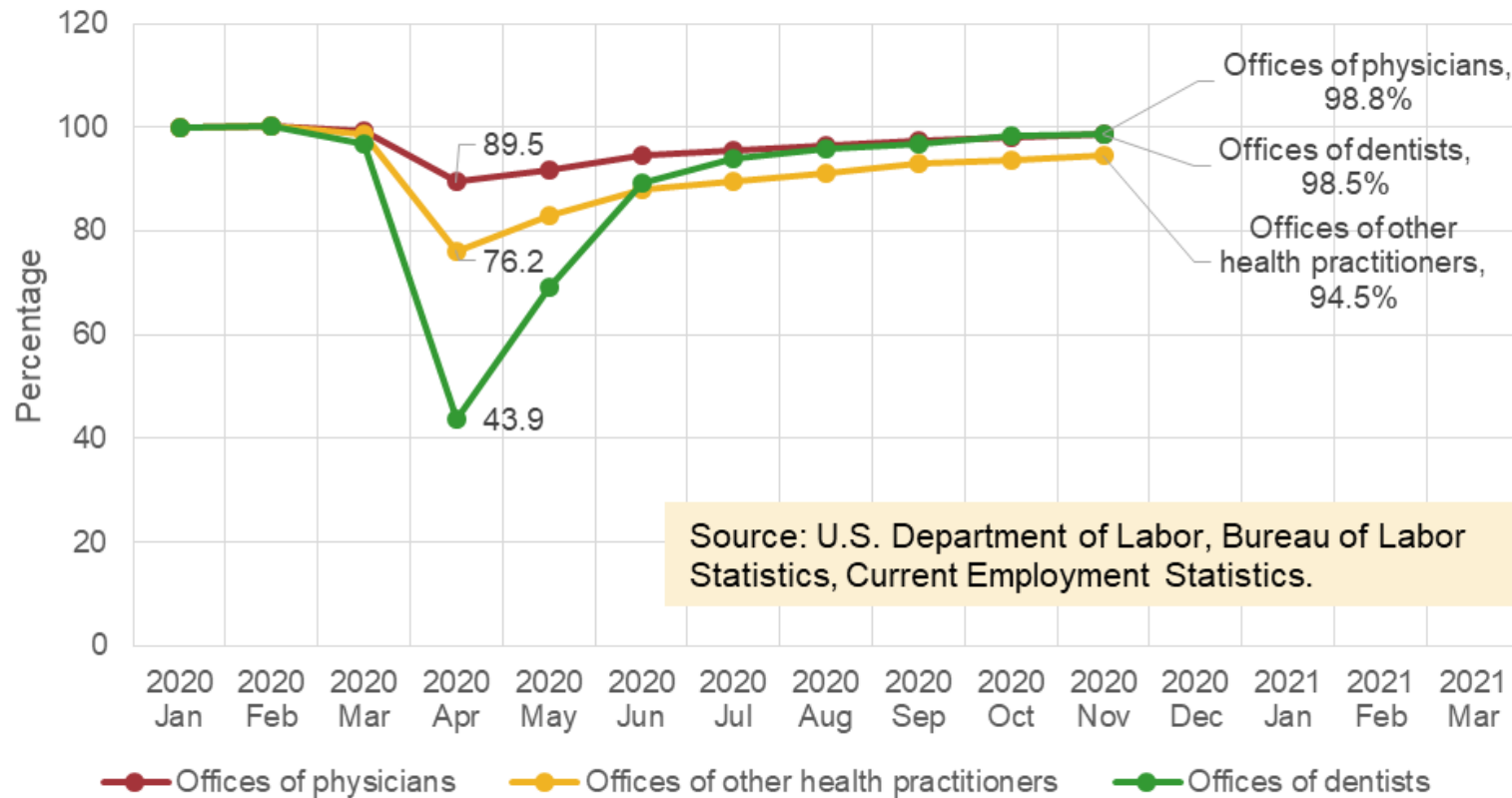
Is your dental practice paying staff this week?



Insight: 92% of dental staff were being paid fully the week of November 30th. Staffing is stable.

Core Questions

Employment as a Percentage of January 2020
Employment, by Health Care Industry

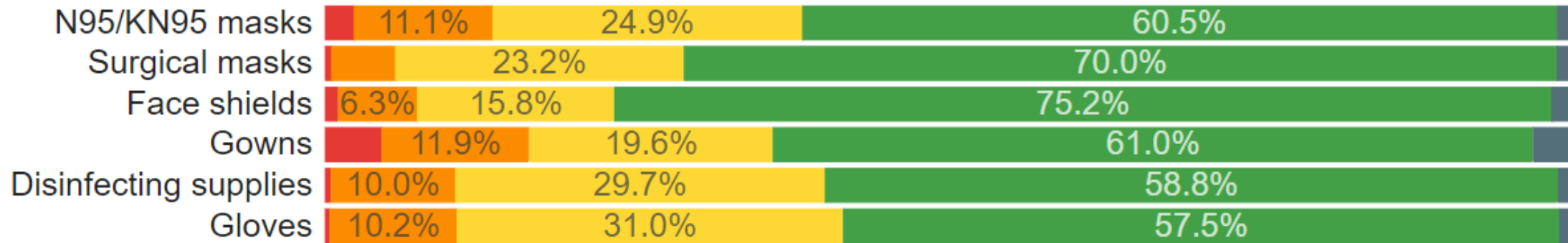


Source: U.S. Department of Labor, Bureau of Labor Statistics, Current Employment Statistics.

Insight: According to BLS data, employment in dental offices is back up to 98.5% of pre-COVID-19 levels as of end of November.

Core Questions

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

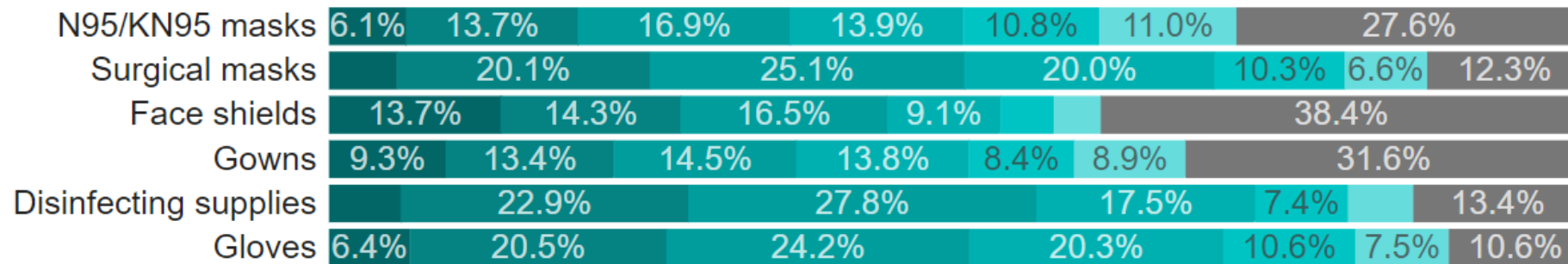


● 0 days ● 1 to 7 days ● 8 to 14 days ● More than 14 days ● Not sure

Insight: PPE availability in dental practices has been stable for several months. Gowns and N95s remain the biggest issue.

Question of the Week

How much have prices changed for your practice since the onset of the COVID for each of the following items?

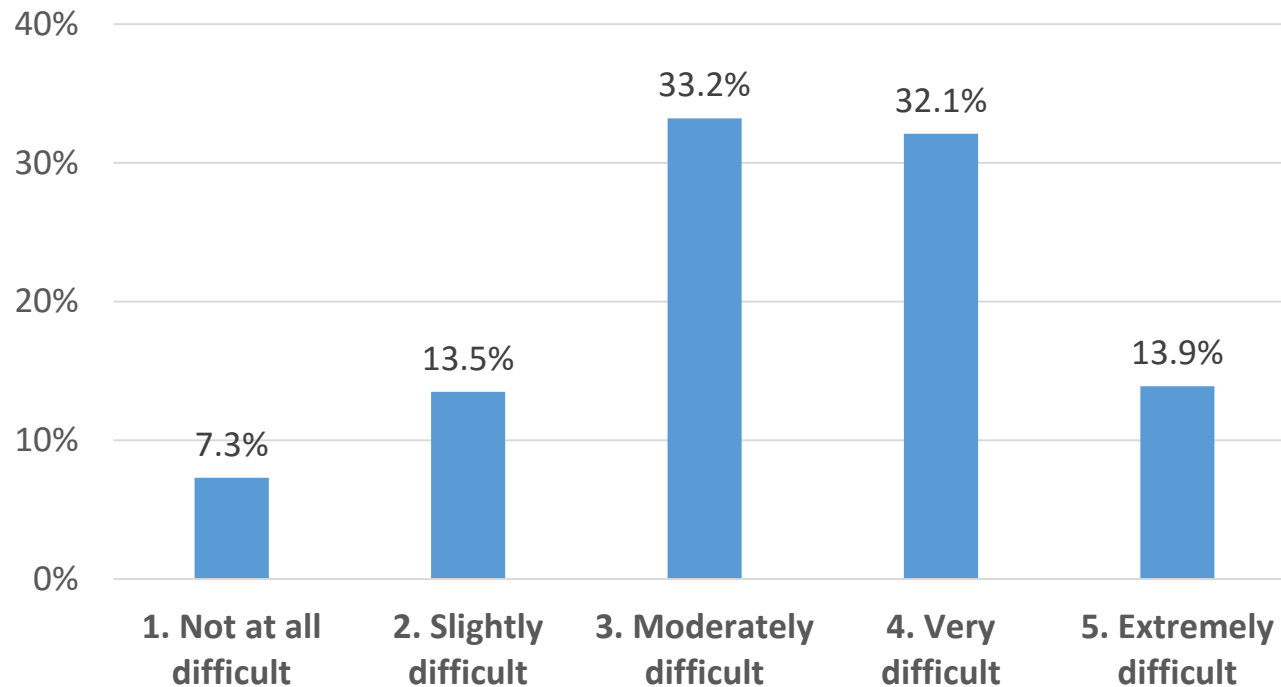


- Stayed about the same
- Up to 50% increase
- Roughly doubled
- Roughly tripled
- Roughly quadrupled
- Roughly 5-time increase or more
- Not sure

Insight: Prices for PPE are up significantly. On average, across all categories of PPE, nearly one-third of dentists reported that prices have at least tripled since the onset of the pandemic. Surgical masks and gloves have seen the largest price increases.

Question of the Week

Specific to gloves, since the onset of the COVID-19 pandemic, how difficult has it been to find the correct size and material (e.g. latex, non-latex) of glove?

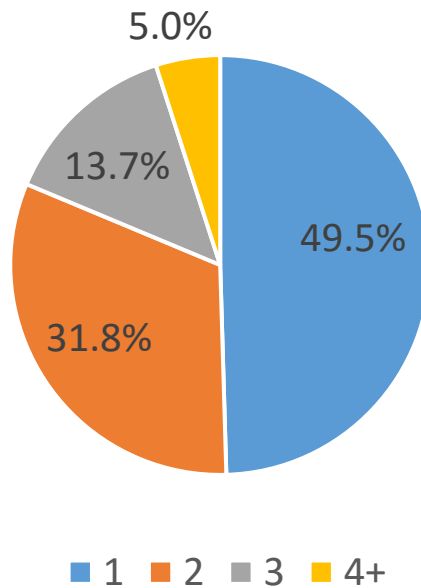


Insight: Most dentists have found it to be moderately or very difficult to obtain the glove of their preferred sizes and material.

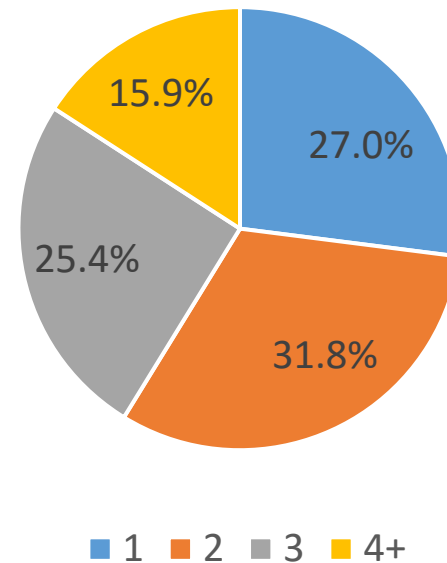
Question of the Week

How has the number of PPE distributors used by practices changed since the onset of the pandemic?

Number of PPE distributors used
PRIOR to the COVID-19 Pandemic



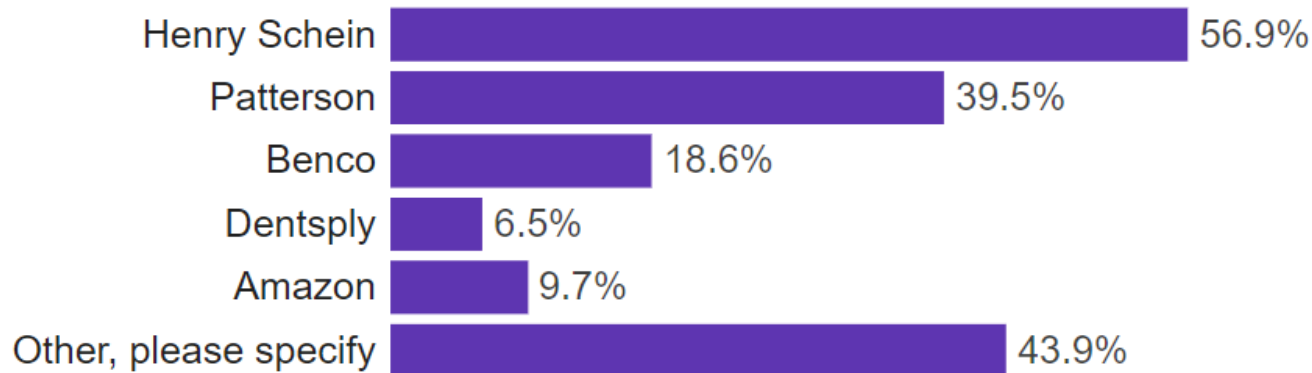
Number of PPE distributors used
SINCE the onset of the Pandemic



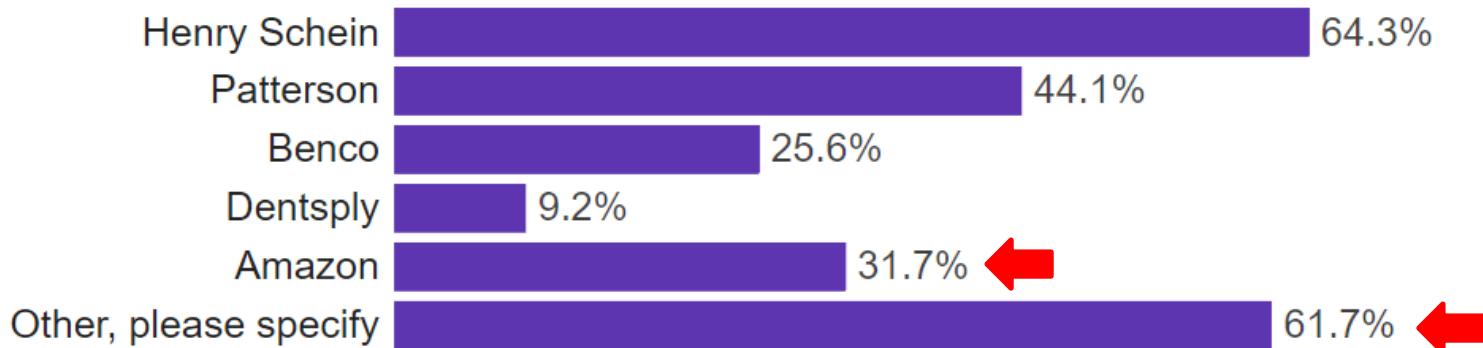
Insight: More dentists are relying on a variety of PPE distributors since the onset of the COVID-19 pandemic. Prior to the pandemic, half of dentists relied on a single PPE distributor. Now nearly three-quarters of dentists are using at least 2 different distributors.

Question of the Week

Which PPE distributor(s) did your practice use **PRIOR** to the COVID-19 pandemic? (Check all that apply.)



Which PPE distributor(s) has your practice used **SINCE** the onset of the COVID-19 pandemic? (Check all that apply.)



Insight: A greater share of dentists are turning to Amazon and smaller PPE distributors compared to before the pandemic.

Question of the Week – Among Medicaid Dentists....

Has your practice disenrolled from Medicaid since the onset of the COVID-19 pandemic?



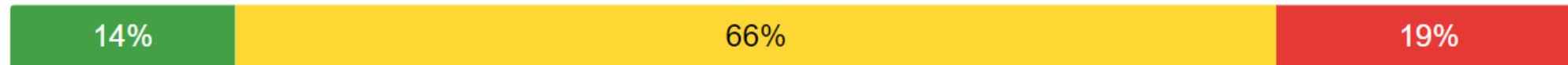
● Yes ● No ● Not sure

[If not disenrolled] Is your practice considering disenrolling from Medicaid in the coming months?



● Yes ● No ● Not sure

How has the number of Medicaid patients your practice can accommodate changed since the onset of the COVID-19 pandemic?



● Increased ● Stayed about the same ● Decreased

Insight: COVID-19 has caused 8% of Medicaid providers to disenroll. An additional 15% are considering disenrolling. Roughly 20% of Medicaid providers have had to decrease the number of Medicaid patients they can accommodate.

Question of the Week

[If not disenrolled] Is your practice currently accepting NEW Medicaid patients?

ALL RESPONDENTS



● Yes ● No ● Not sure

By DSO Affiliation	DSO	75.0%
	Non-DSO	61.5%
By Practice Size	Solo Dentists	63.1%
	2-9 Dentists	59.4%
	Large Group	80.0%
By Geography	Top 20 Cities	93.1%
	Other Urban	63.7%
	Suburban	70.0%
	Rural	49.7%

By Specialty	GP	56.9%
	OMS	83.3%
	Endo	100.0%
	Ortho	92.3%
	Ped	77.5%
	Perio	--
	Pros	50.0%

Insight: The majority of Medicaid providers are currently accepting new patients covered by Medicaid.

Insights from Consumer Polling



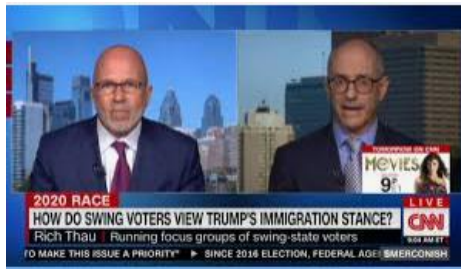
AMERICA STANDS AT AN INFLECTION POINT.

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:

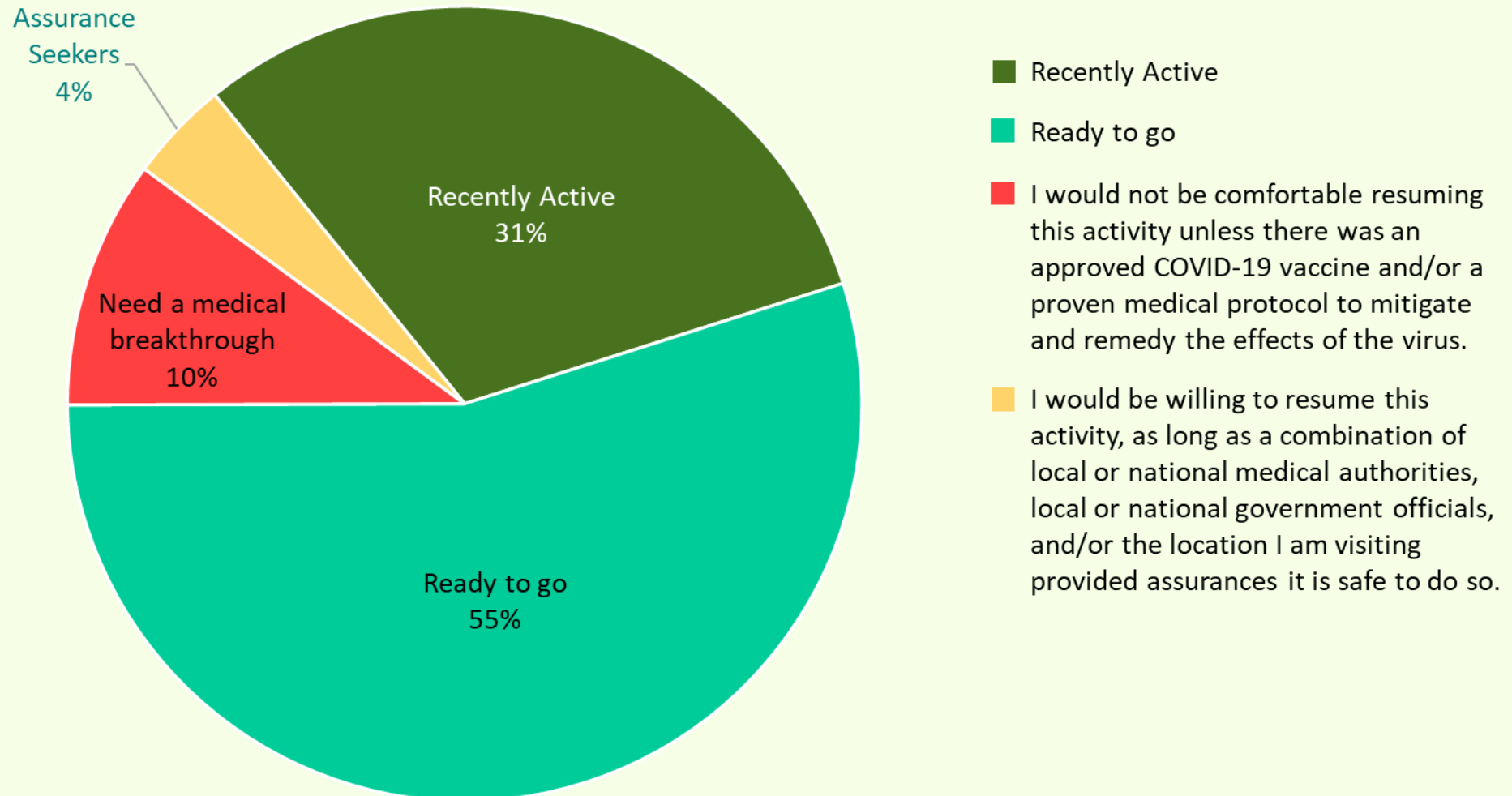
- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**

We partnered with Engagious, a leading consumer research firm, to explore consumer sentiment toward visiting the dentist during the pandemic.



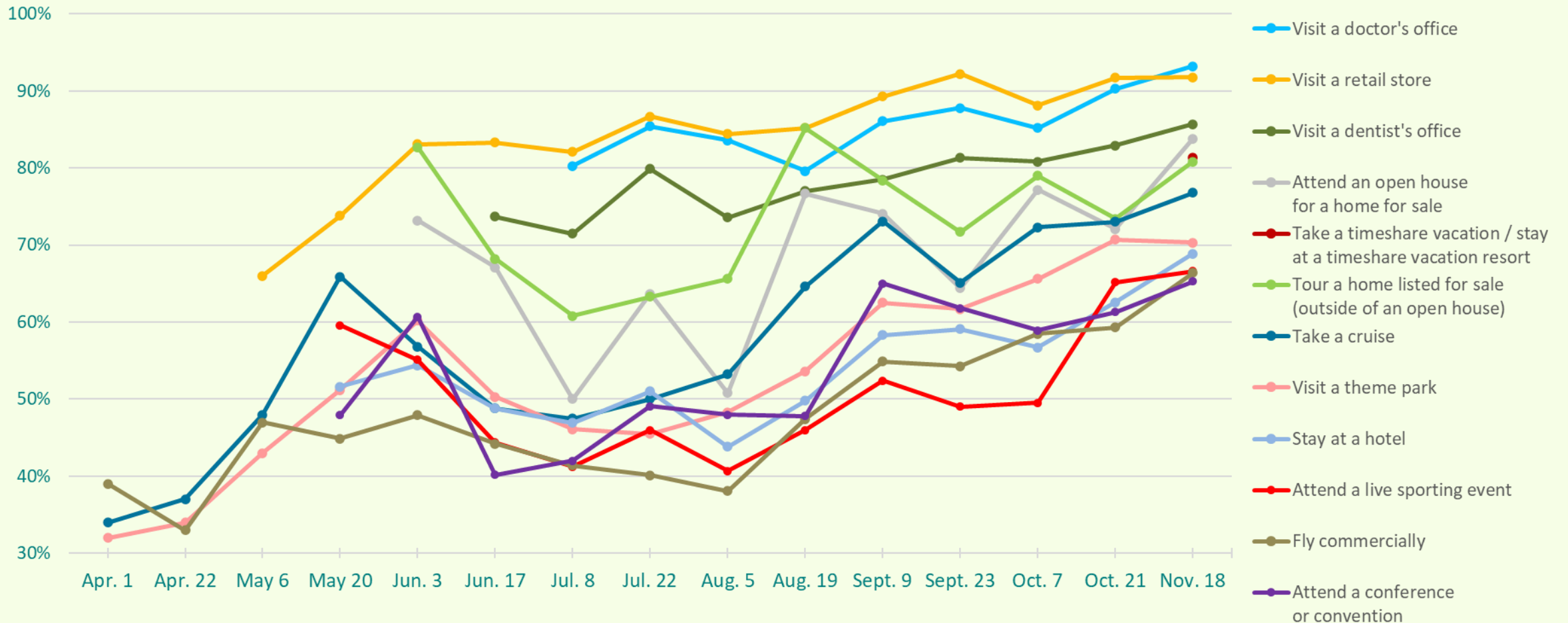
WAVE 15: 86% READY TO VISIT DENTIST—OR ALREADY HAVE

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



WILLINGNESS TO ENGAGE CONTINUES TO RISE

[Among those who have done this activity in the past 12 months:] For each of the following activities, please indicate which of the following conditions is closest to your current point of view: Recently active + Ready to go



Key Take-Aways from November 30th Data

- **Recovery and Renewal:** As of the week of November 30th, one-third of dental practices reported “business as usual” in terms of patient volume. Patient volume was estimated at 76% of pre-COVID-19 levels. Recovery has been slower in public health settings, where only 20% reported “business as usual” and patient volume was estimated at 66% of pre-COVID-19 levels.
- **PPE Pricing and Distributors:** Prices for PPE have increased substantially since the onset of the COVID-19 pandemic. On average, across all categories of PPE, nearly one-third of dentists reported that prices have tripled or more. Dentists are therefore relying on a greater variety of PPE distributors, and more dentists are turning to Amazon and smaller distributors compared to before the pandemic.
- **Medicaid Disenrollment:** COVID-19 has caused 8% of Medicaid providers to disenroll from the program. An additional 15% are considering disenrolling in the coming months and 14% remain unsure about their intentions to disenroll from Medicaid. The majority of current Medicaid providers are accepting new patients covered by Medicaid. Roughly 20% of Medicaid providers have had to decrease the number of Medicaid patients they can accommodate in their practices since the onset of the COVID-19 pandemic.
- **Consumer Sentiment:** Vaccine availability remains an important part of bringing the remaining patient base back into the dental office.

Thank You!



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ADA American Dental Association®