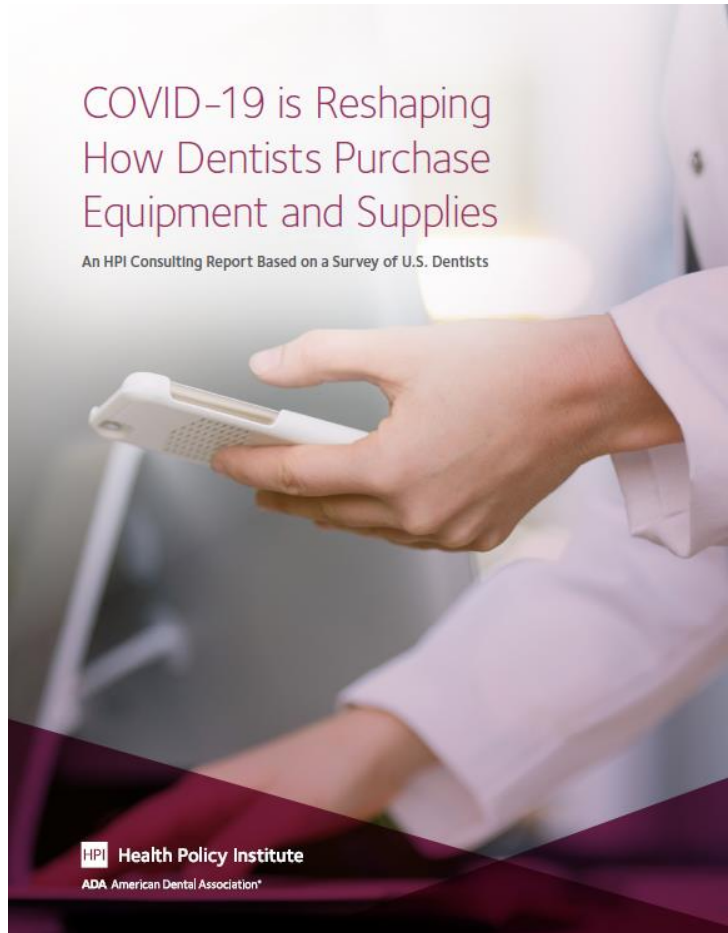


# The Impact of COVID-19 on the Dental Care Sector

Insights from Data for the Week of December 14<sup>th</sup>

# 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](http://www.ada.org/hpi)

# Today



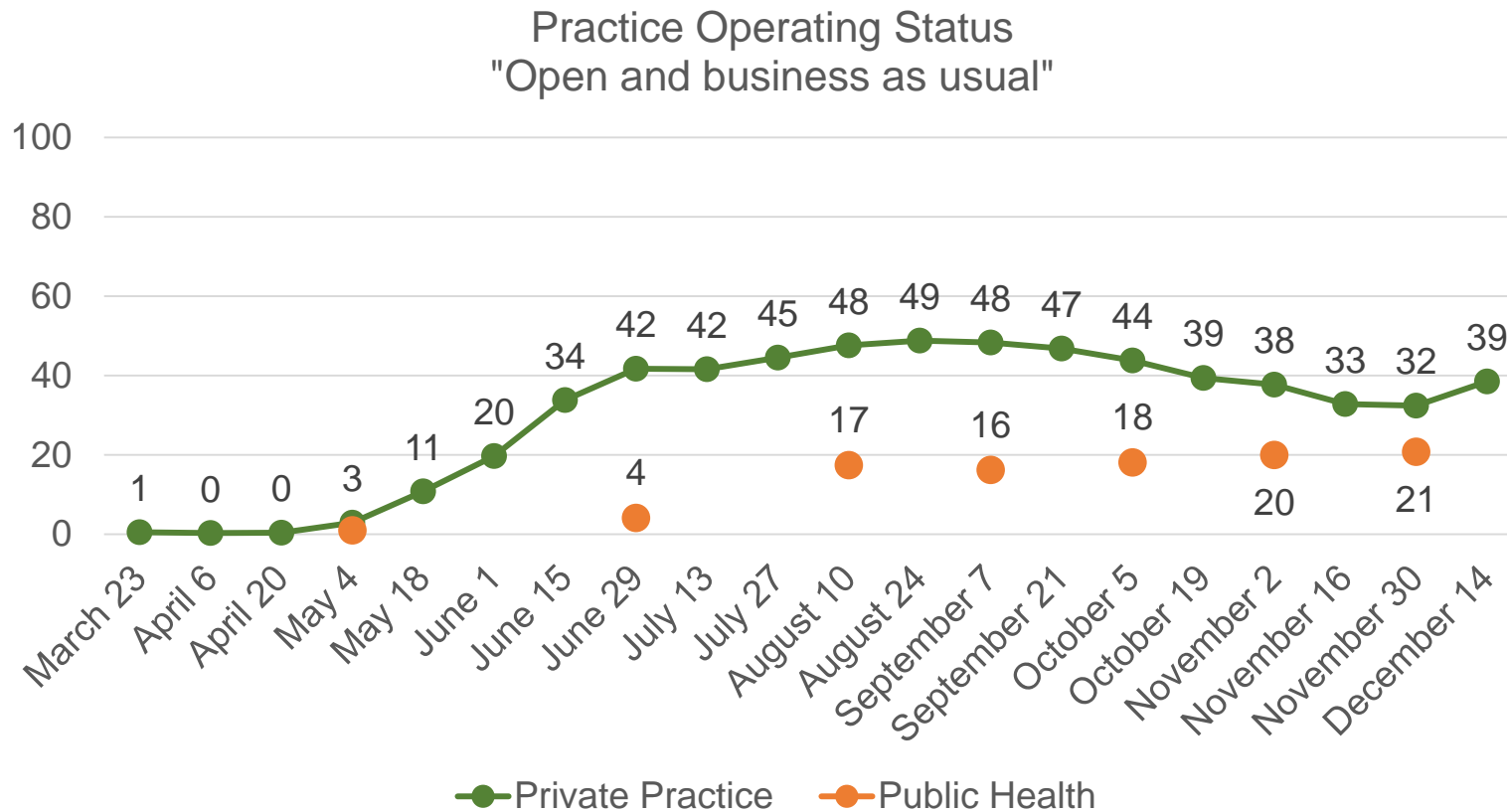
1. *Update on the latest data on dental sector recovery – week of December 14<sup>th</sup>.*
2. *'Question of the Week' data on rapid response COVID-19 testing in dental practices and the importance of dentists getting vaccinated against COVID-19.*
3. *The latest consumer sentiment data related to dental visits.*

# HPI Impact of COVID-19 Tracking Poll

- Bi-weekly poll of private practice dentists beginning March 23<sup>rd</sup>.
- 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](http://www.ada.org/hpi).

# Core Questions

## What is the current status of your dental practice?

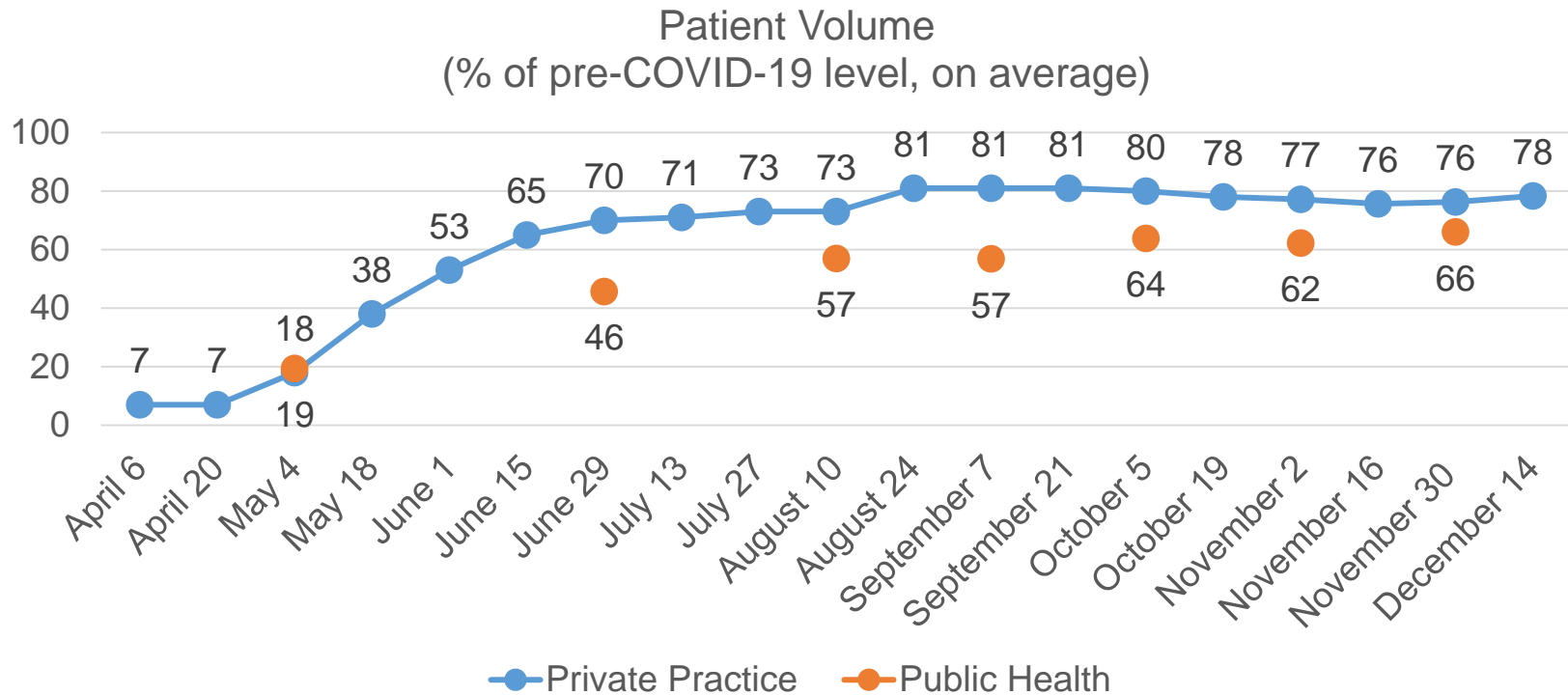


*Insight: As of the week of December 14<sup>th</sup>, 99% of dental practices in the U.S. were open. Nearly 40% of practices reported "business as usual" in terms of patient volume.*

# Core Questions

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

Total Patient Volume

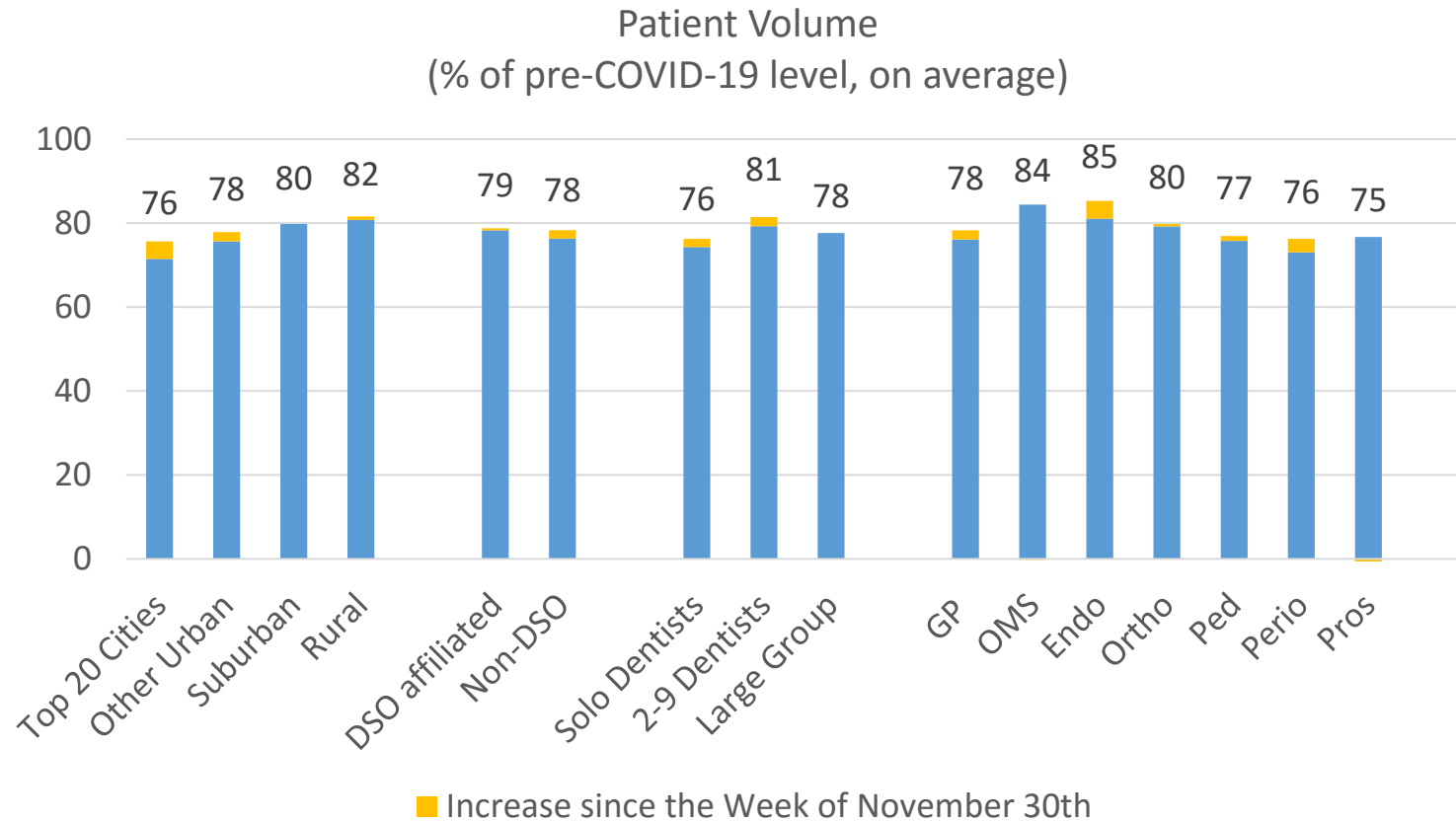


*Insight: Patient volume in private practices was at 78% of pre-COVID-19 levels as of the week of December 14<sup>th</sup>.*

# Core Questions

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

Total Patient Volume



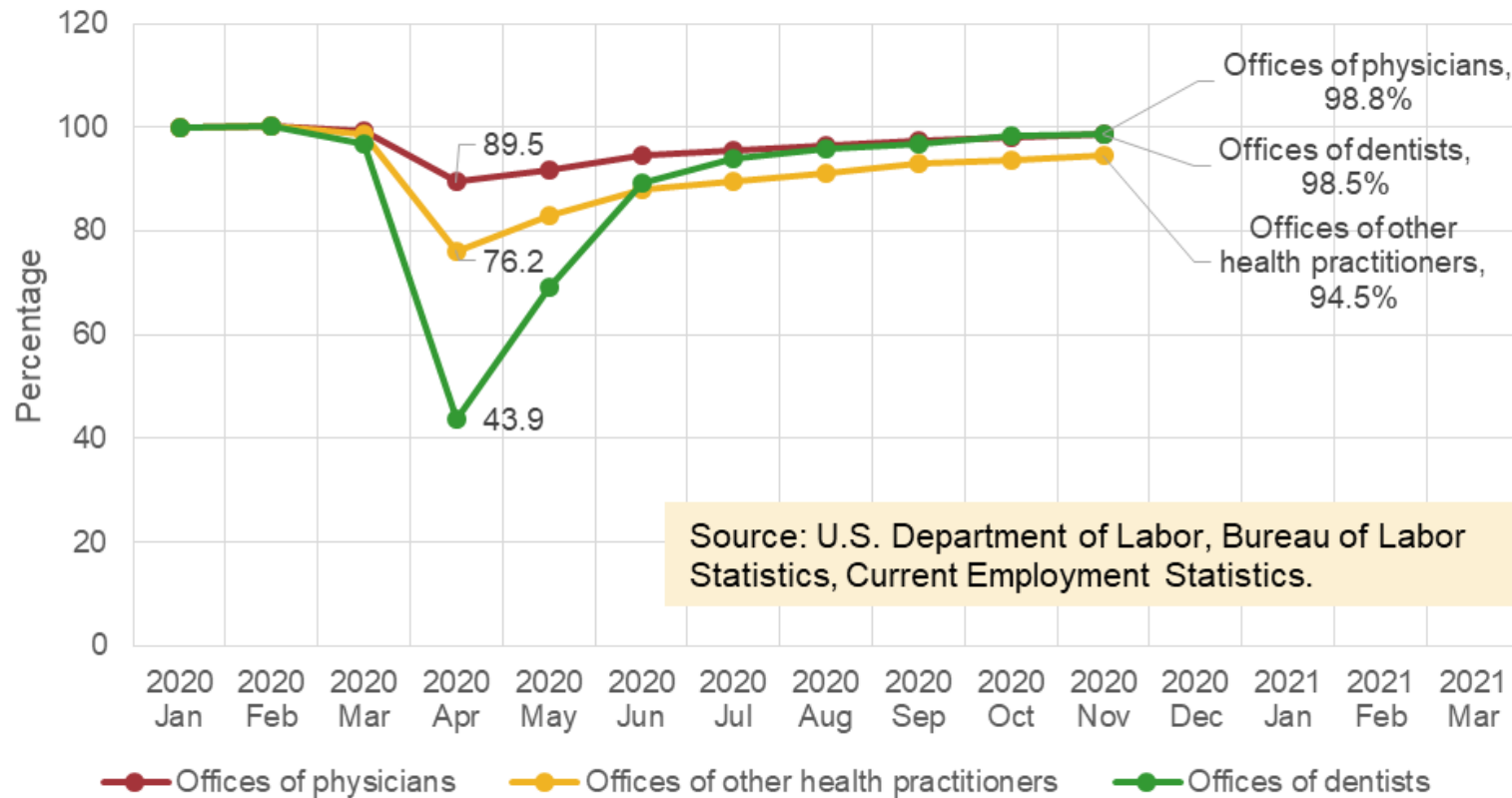
*Insight: Patient volume varies to some extent by geography, DSO affiliation, practice size, and specialty.*

*The highest patient volumes as of the week of December 14<sup>th</sup> were reported by endodontists and oral surgeons, dentists in group practices, and dentists practicing in rural and suburban areas.*

*Most categories of dentists have experienced a slight increase in patient volume since the week of November 30<sup>th</sup>.*

# Core Questions

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



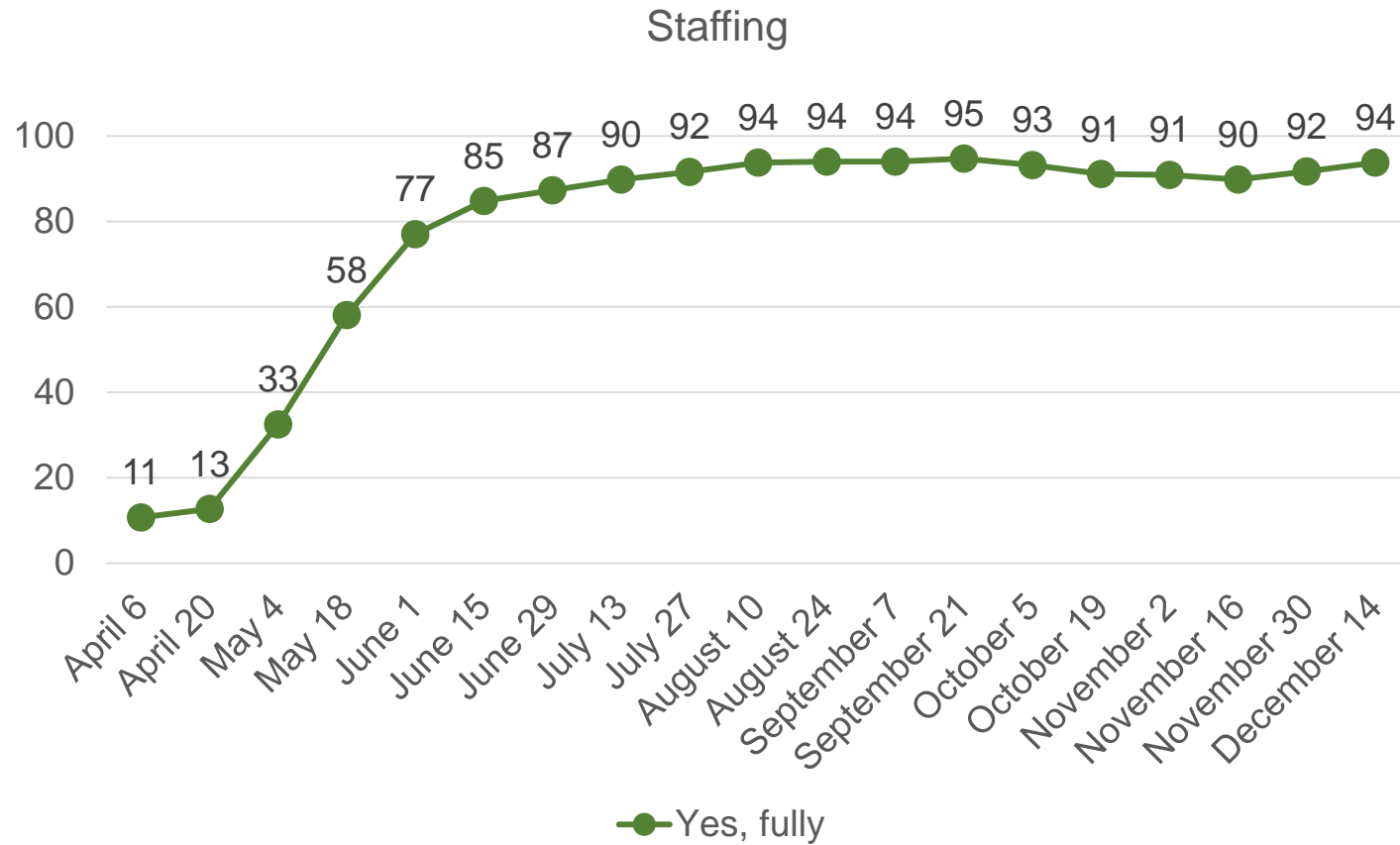
Source: U.S. Department of Labor, Bureau of Labor Statistics, Current Employment Statistics.

*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

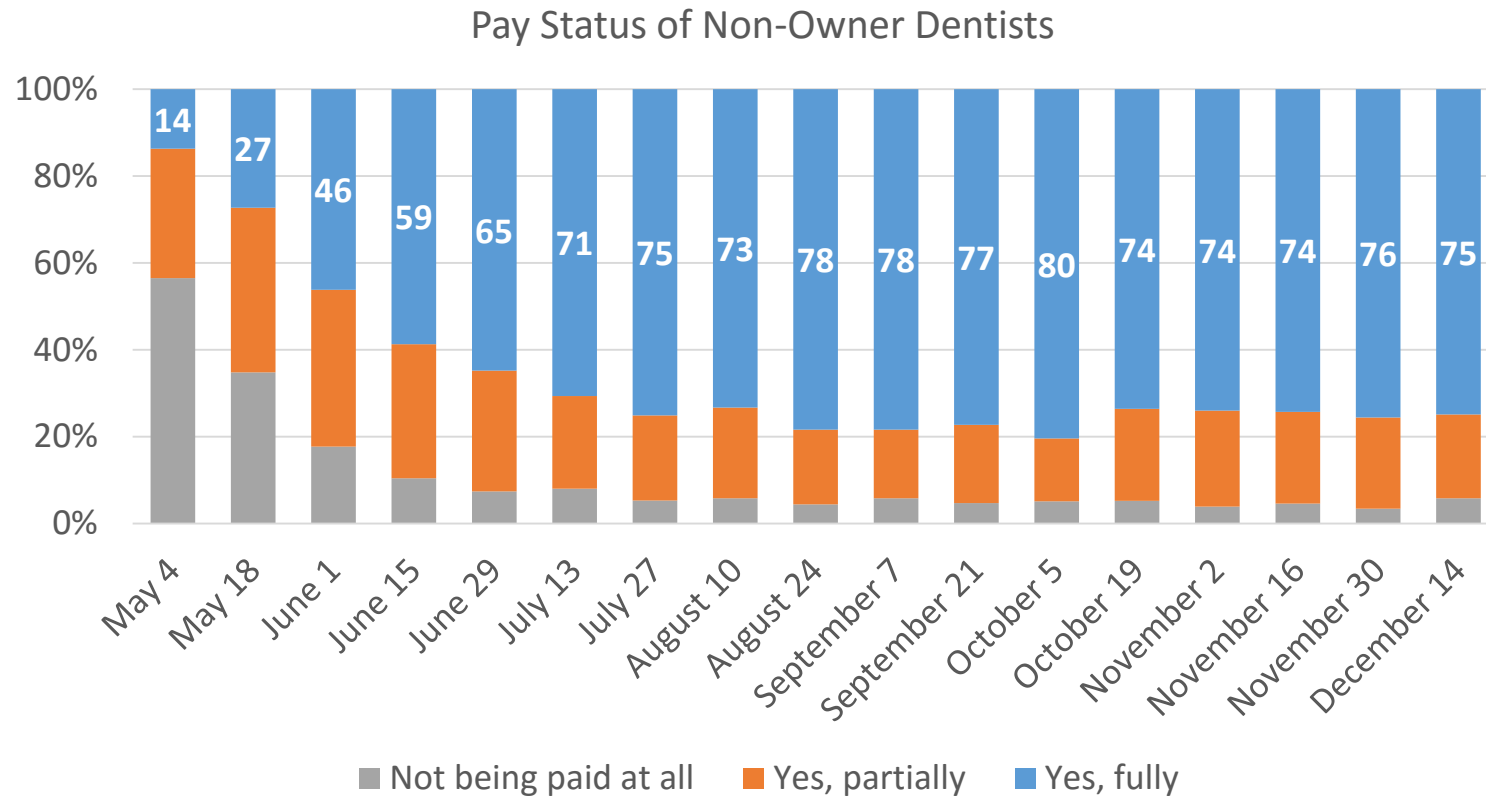
## Is your dental practice paying staff this week?



*Insight: 94% of dental staff were being paid fully the week of December 14<sup>th</sup>. Staffing is stable.*

# Core Questions

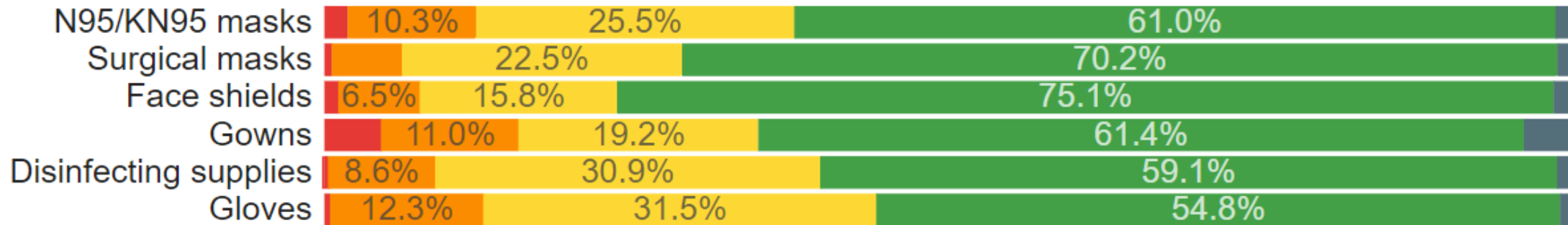
**[If non-owner dentist] Are YOU being paid this week?**



*Insight: Employee dentists have seen the biggest lingering employment effect. 75% of employee dentists were being paid fully as of the week of December 14<sup>th</sup>.*

# 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, gloves, and disinfecting supplies are the biggest issue.*

# Question of the Week

Does your practice offer in-office rapid response COVID-19 testing for patients?



99%

● Yes ● No

*Insight: Point-of-care testing for COVID-19 is largely not being done in dental practices. Only 1% of dentists are currently offering testing to their patients.*

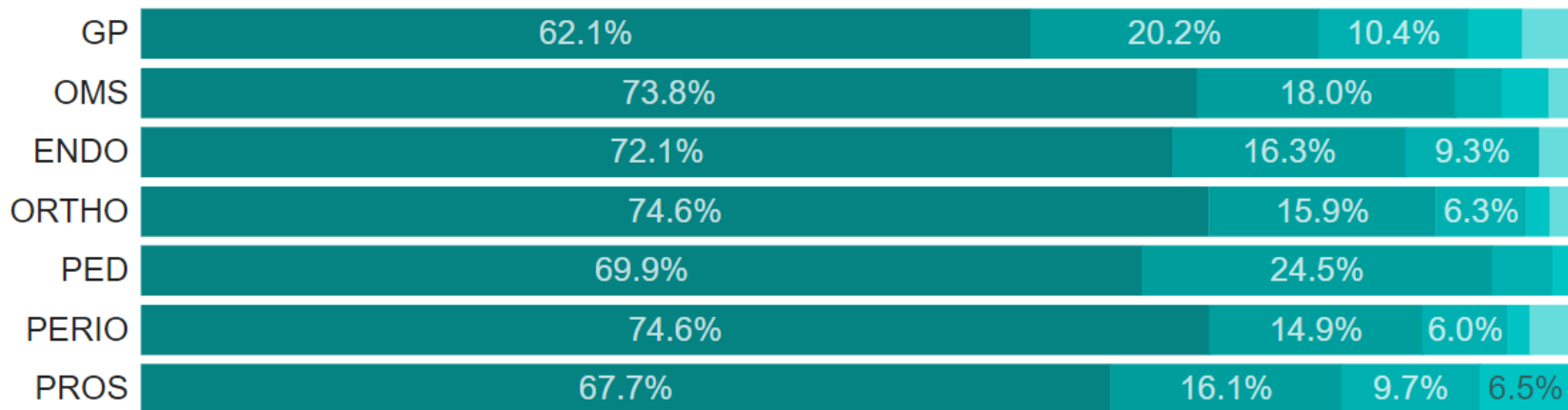
*A slightly greater share of oral surgeons and dentists practicing in DSO-affiliated and large group practices are offering testing.*

# Question of the Week

## How important do you think it is for DENTISTS to be vaccinated against COVID-19?



- Extremely important [64%]
- Very important [20%]
- Moderately important [10%]
- Slightly important [3%]
- Not at all important [3%]



*Insight: Dentists believe that it is important to be vaccinated against COVID-19 with 84% of dentists indicating vaccination to be “extremely” or “very” important.*

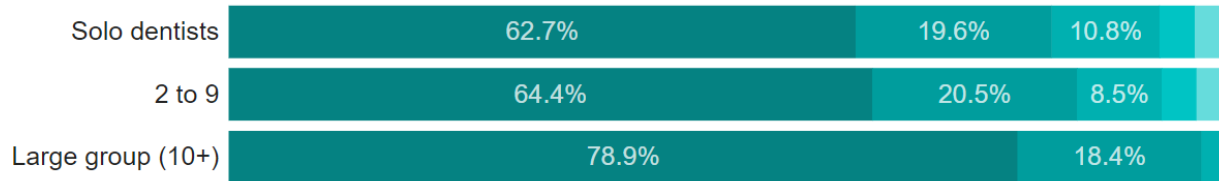
*Specialists find greater importance in COVID-19 vaccination than general dentists.*

# Question of the Week

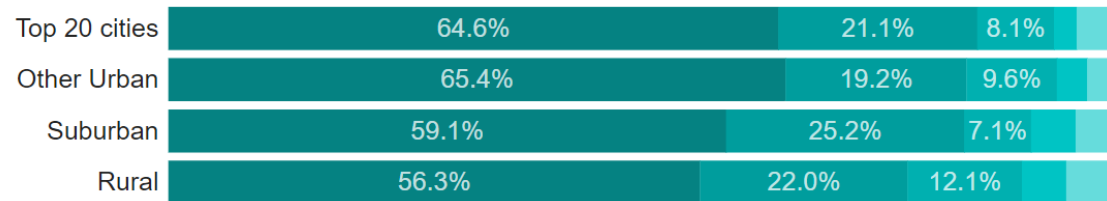
## How important do you think it is for DENTISTS to be vaccinated against COVID-19?

### BY PRACTICE SIZE

● Extremely important ● Very important ● Moderately important ● Slightly important ● Not at all important



### BY GEOGRAPHY



### BY DSO AFFILIATION



### BY OWNERSHIP STATUS

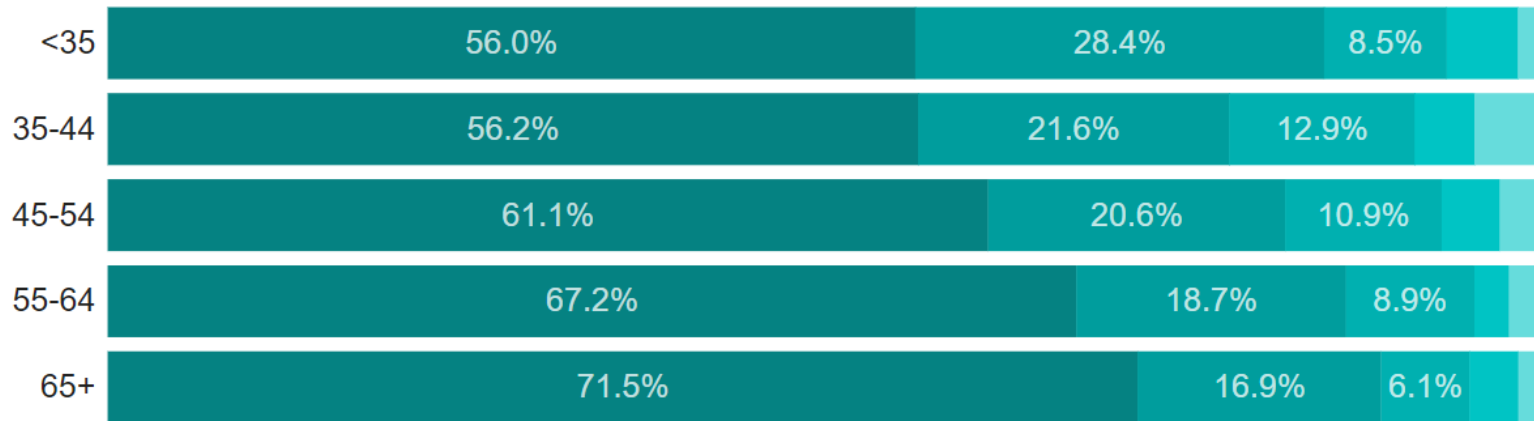


*Insight: Dentists in large group practices place a greater importance on COVID-19 vaccination, as do dentists practicing in urban areas and non-DSO-affiliated practices, and owner dentists.*

# Question of the Week

## How important do you think it is for DENTISTS to be vaccinated against COVID-19?

### BY AGE GROUP



*Insight: There are demographic variations in the level of importance placed on COVID-19 vaccination among dentists. With increasing age, dentists find more importance in vaccination. More male than female dentists find it “extremely” important to be vaccinated against COVID-19.*

### BY GENDER



● Extremely important   ● Very important   ● Moderately important   ● Slightly important   ● Not at all important

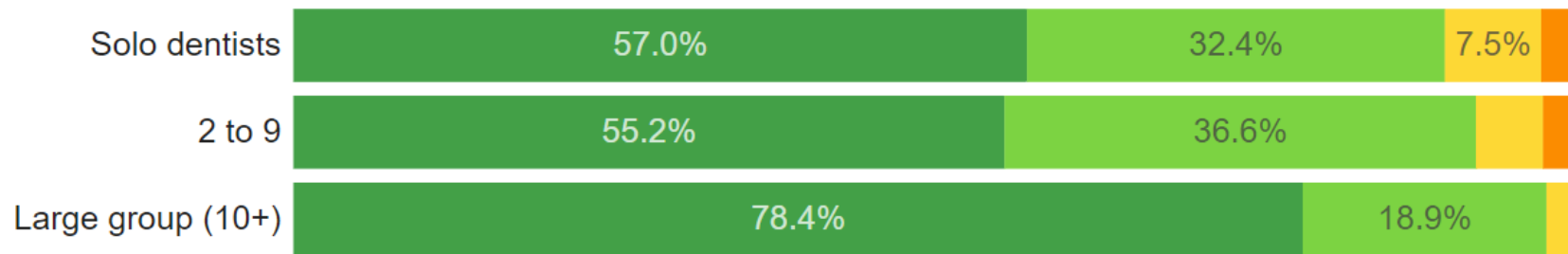
# Question of the Week

[If slightly, moderately, very or extremely important] Now that a vaccine for COVID-19 is available, how soon do you think dentists SHOULD get vaccinated?



● Immediately ● Not immediately, but within 1-2 months ● Within 3-6 months ● After 6 months

## BY PRACTICE SIZE



*Insight: The majority of dentists believe they should get vaccinated against COVID-19 “immediately” or as soon as it is available to them.*

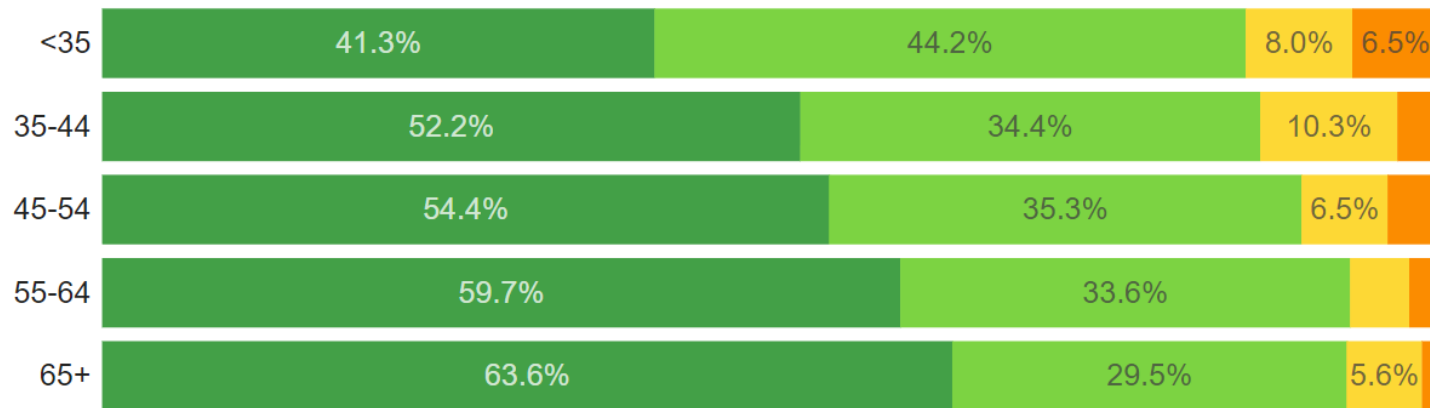
*The vast majority of dentists in large group practices believe they should get the vaccination immediately.*



# Question of the Week

**[If slightly, moderately, very or extremely important] Now that a vaccine for COVID-19 is available, how soon do you think dentists SHOULD get vaccinated? (continued)**

BY AGE GROUP



*Insight: A lesser share of younger dentists and female dentists believe that dentists should receive the vaccine as soon as it is available to them. This could indicate greater vaccine hesitancy in these groups of dentists.*

BY GENDER



● Immediately   
 ● Not immediately, but within 1-2 months   
 ● Within 3-6 months   
 ● After 6 months

# Insights from Consumer Polling

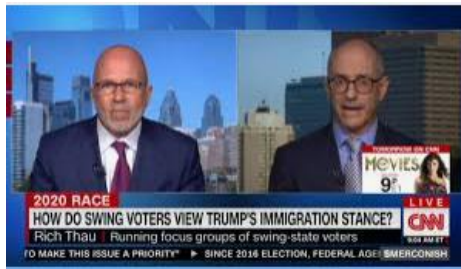


## AMERICA STANDS AT AN INFLECTION POINT.

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:

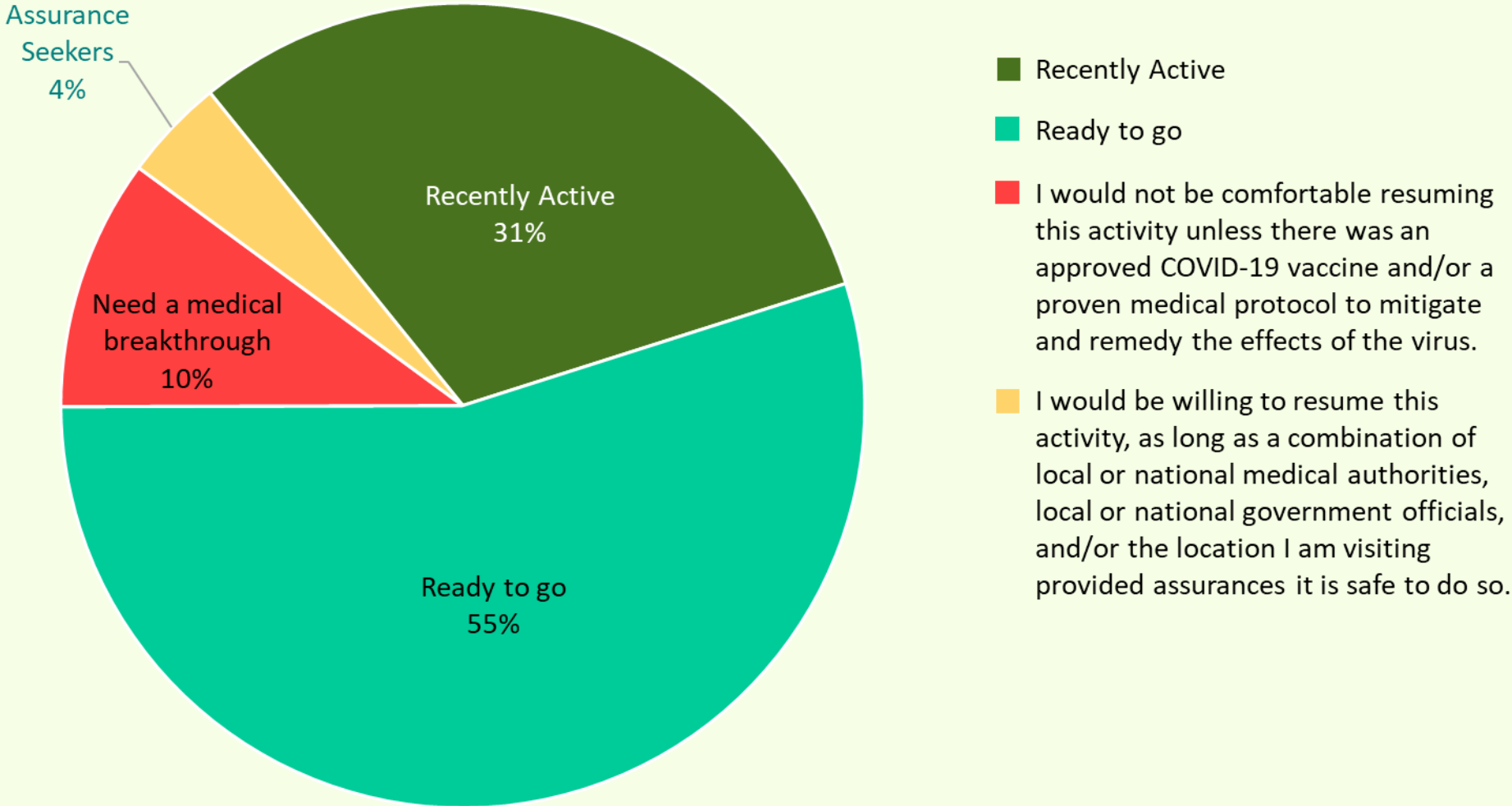
- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**



*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



# Key Take-Aways from December 14<sup>th</sup> Data

- **Recovery and Renewal:** As of the week of December 14<sup>th</sup>, patient volume was estimated at 78% of pre-COVID-19 levels. Staffing was at 98.5% of pre-COVID-19 levels in dental offices and three-quarters of employee dentists were being paid fully as of the week of December 14<sup>th</sup>.
- **Point-of-care COVID-19 Testing:** Rapid response COVID-19 testing is largely not being offered in dental practices. This may be due to a combination of factors such as cost and availability of reliable testing.
- **Importance of Dentists Getting Vaccinated:** The vast majority of dentists find it extremely or very important that they get vaccinated against COVID-19, and the majority believe they should get vaccinated as soon as the vaccine is available to them. Older dentists, dentists in large group practices, and specialists find vaccination to be particularly important.
- **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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