

Economic Impact of COVID-19 on the Dental Care Sector:

Data for Week of July 13th Explore Impact of Rising
COVID-19 Cases in Several States

Today



1. *Update on the latest data from HPI economic impact of COVID-19 tracking poll.*
2. *A closer look at select states where COVID-19 cases are rising: TX, FL, CA.*
3. *'Question of the Week' data focusing on teledentistry as well as the barriers to full employment.*
4. *The latest consumer sentiment data related to dental visits.*

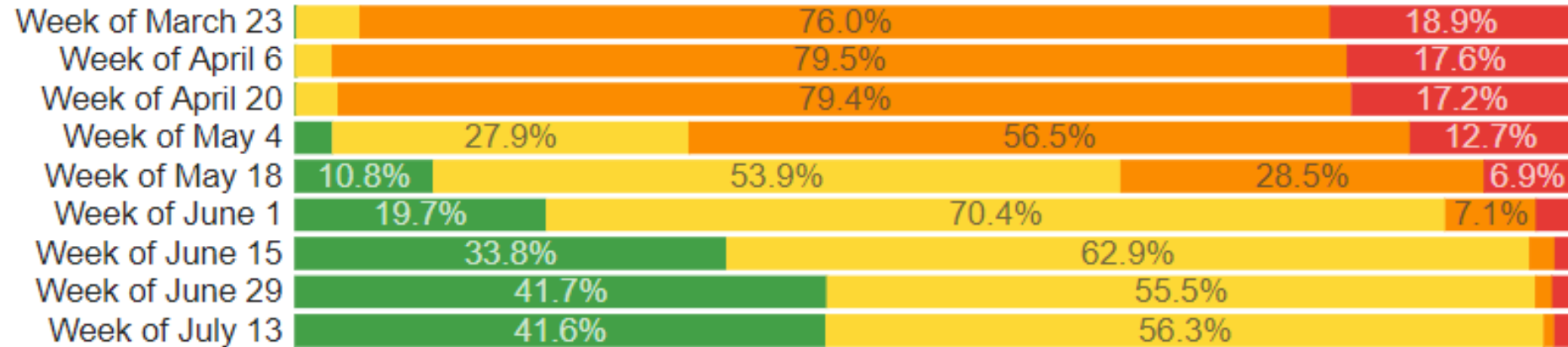
HPI Economic Impact of COVID-19 Tracking Poll

- Bi-weekly poll.
- Core measures: Status of your practice, volume of patients and collections, status of dental practice staff.
- “Question(s) of the Week”.
- Response rate around 50%. It has dropped in recent waves but our analysis indicates this is not a source of bias (e.g. it is not the case that busier dentists are less likely to respond).
- Representative sample of dentists in private practice.
- Two additional waves of data collection focused on dentists in public health settings. Stay tuned!
- Reports and interactive dashboard available at www.ada.org/hpi

| Wave | Responses |
|------------------|-----------|
| Week of March 23 | 19,154 |
| Week of April 6 | 6,109 |
| Week of April 20 | 6,614 |
| Week of May 4 | 6,774 |
| Week of May 18 | 6,504 |
| Week of June 1 | 5,675 |
| Week of June 15 | 4,808 |
| Week of June 29 | 4,371 |
| Week of July 13 | 4,388 |

Core Questions

What is the current status of your dental practice?



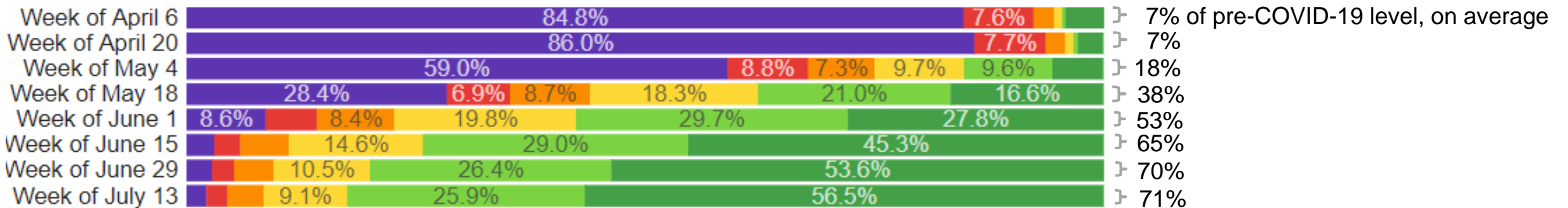
- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

Insight: As of week of July 13, 98% of dental practices in the U.S. are open. This was 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



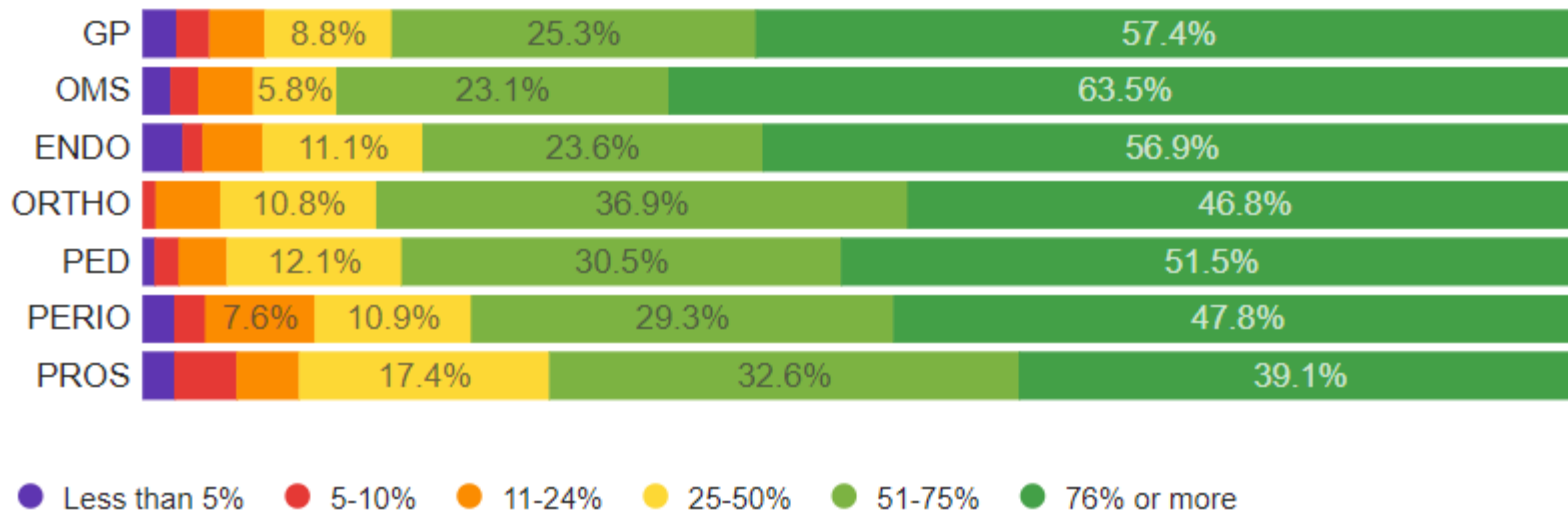
● Less than 5%
 ● 5-10%
 ● 11-24%
 ● 25-50%
 ● 51-75%
 ● 76% or more

Insight: Nationally, patient volume is leveling off. Patient volume is estimated at 71% of pre-COVID-19 levels for the week of July 13, largely unchanged from two weeks prior.

Core Questions

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

Total Patient Volume

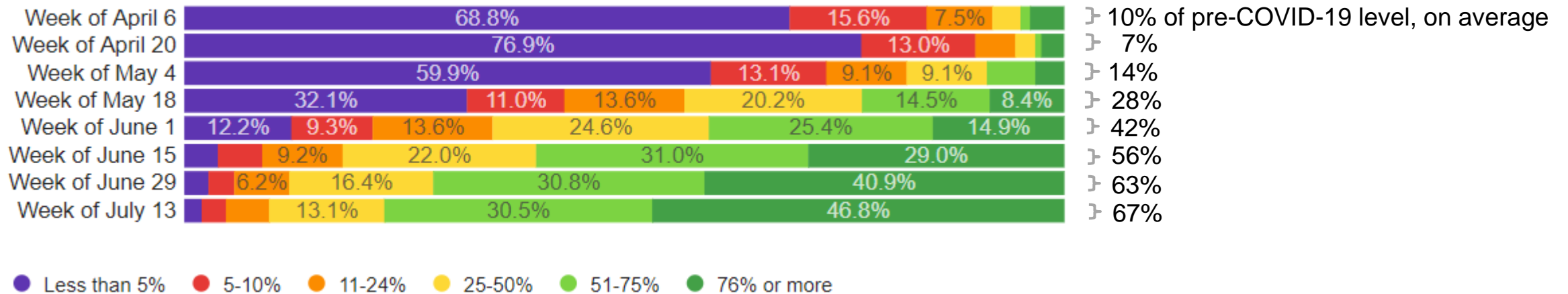


Insight: There are variations in patient volume by specialty.

Core Questions

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

Volume of Total Collections

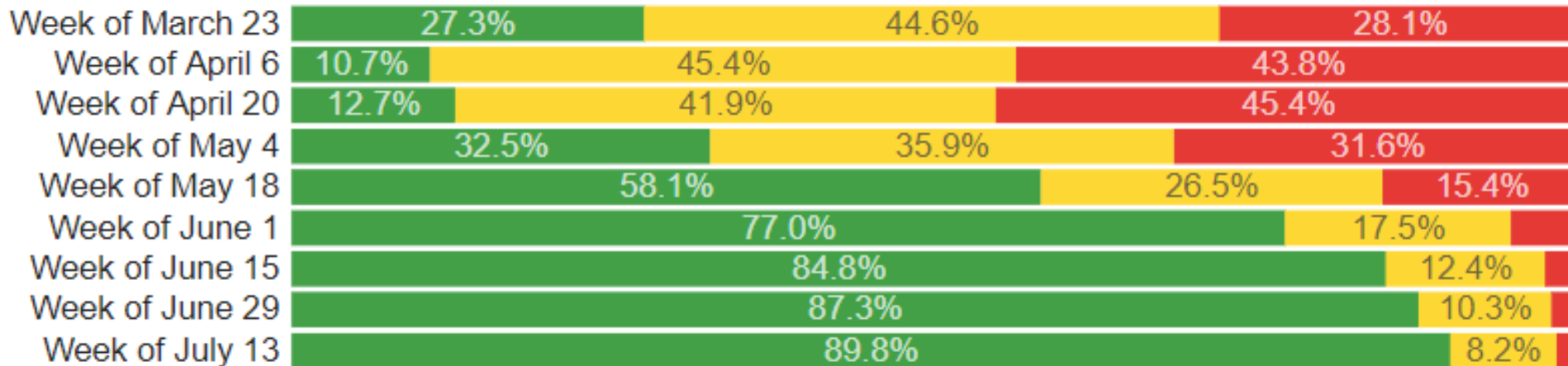


Insight: Nationally, the volume of collections continues to increase, but not by as much as in previous weeks. Collections lag patient volume both on the shut-down and re-opening phase of the pandemic.

Core Questions

Is your dental practice paying staff this week?

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

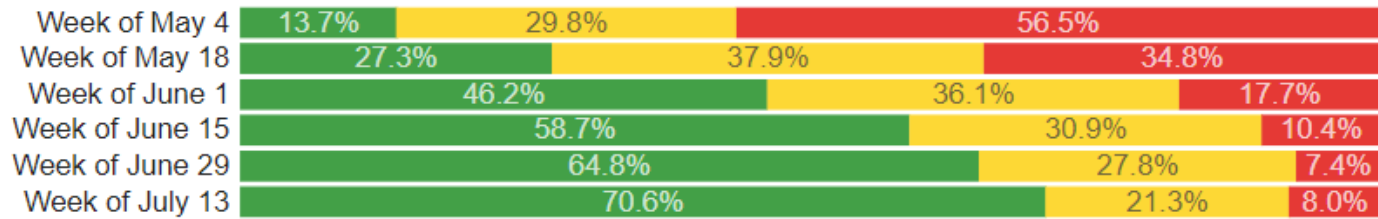


● Yes, fully ● Yes, partially ● Not paying any staff

Core Questions

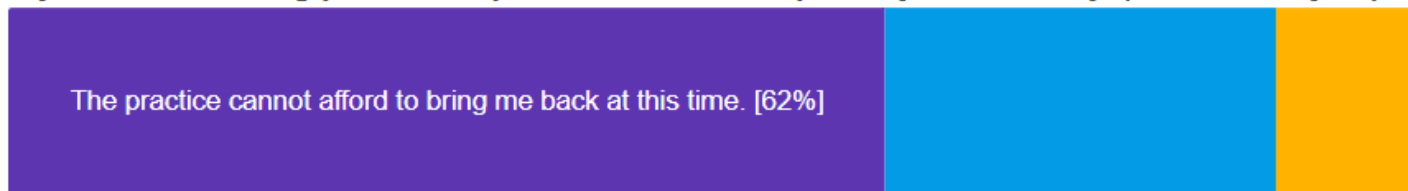
PAY STATUS OF ASSOCIATES, EMPLOYEES, AND INDEPENDENT CONTRACTORS

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



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

If you are not being paid at all, please indicate the primary reason why. (week of July 13)



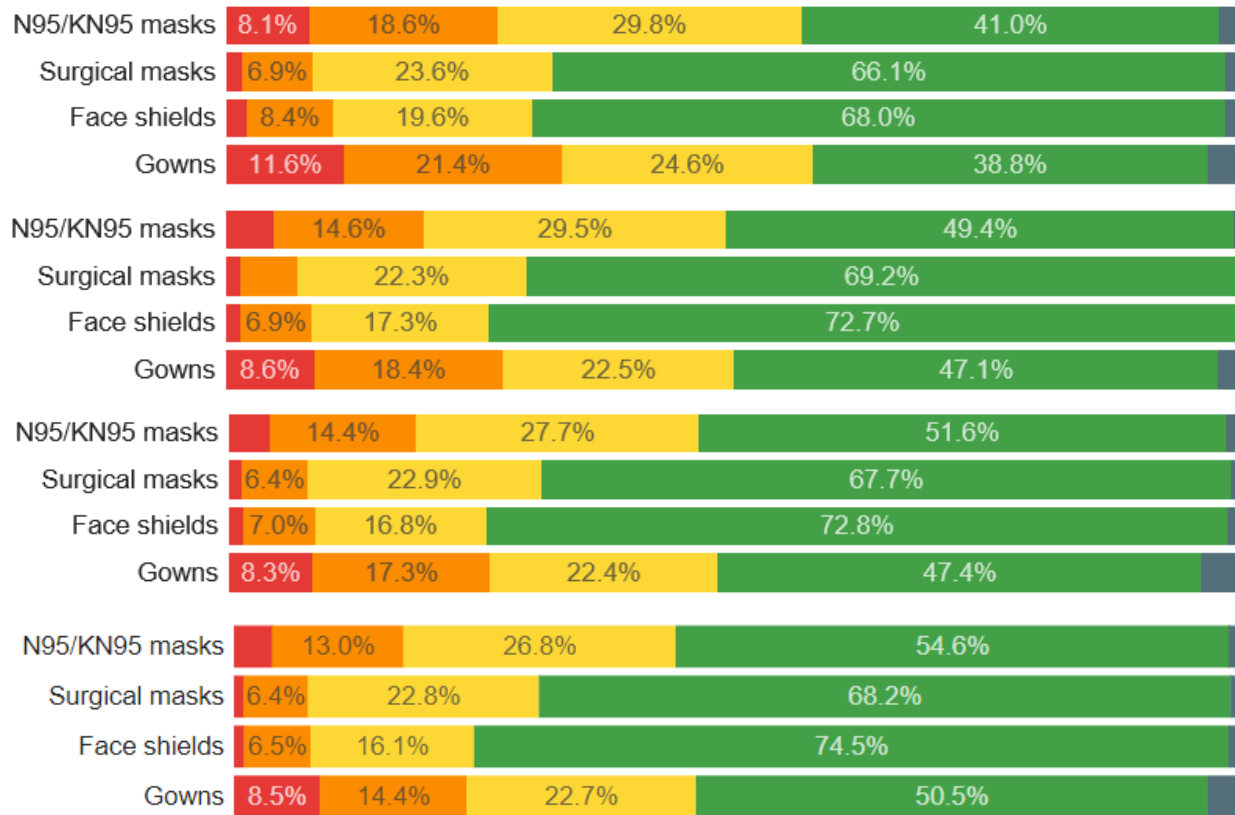
● The practice cannot afford to bring me back at this time. [62%] ● I do not want to return at this time. [28%]
 ● Other, please specify [10%]

Insight: Recent hiring has focused on employee dentists. About 70% of employee dentists are now being paid fully.

For those not being paid at all, the main reason they give is that their employer cannot afford to hire them back.

Core Questions

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



Week of June 1

Week of June 15

Week of June 29

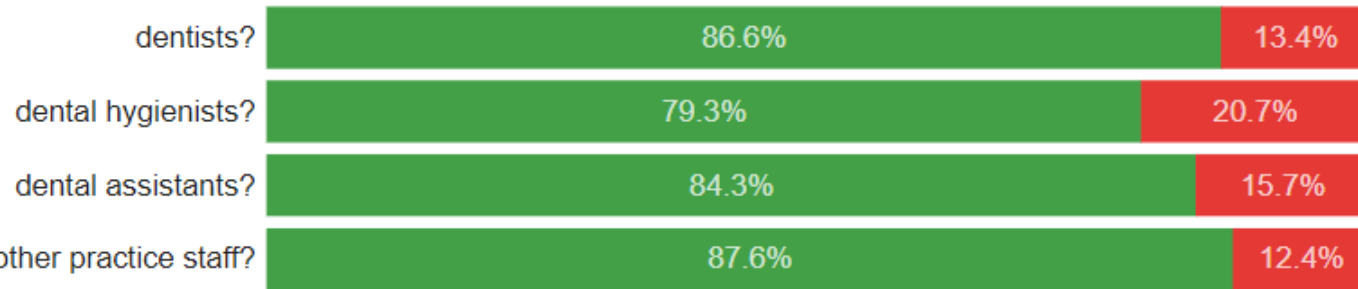
Week of July 13

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

Is your dental practice back to pre-COVID-19 staffing levels for:



● Yes ● No

Insight: According to dental practice owners, staffing is below pre-COVID-19 levels mainly because staff do not wish to return rather than the practice cannot afford to hire them back.

If staffing levels [in any of the following categories] have not returned to pre-COVID-19 levels, please indicate why.



● The practice cannot afford to bring them back at this time. ● They do not want to return at this time. ● Other, please specify

However, according to employee dentists who have not been hired back, the main reason is that the practice cannot afford to hire them back.

The reality is likely somewhere in between.

Question of the Week

If staffing levels [in any of the following categories] have not returned to pre-COVID-19 levels, please indicate why.



- The practice cannot afford to bring them back at this time.
- They do not want to return at this time.
- Other, please specify

Other Reasons-Dentists

| Category | Percentage of Responses |
|---|-------------------------|
| SPACING ISSUES / SOCIAL DISTANCING GUIDELINES | 37.9% |
| DENTIST TOOK ANOTHER POSITION | 20.7% |
| TEMPORARY FAMILY OR MEDICAL LEAVE | 17.2% |
| WORKING AGAIN BUT WITH REDUCED HOURS | 13.8% |
| DENTIST SHORTAGE - UNABLE TO HIRE | 6.9% |
| DEATH DUE TO COVID-19 | 3.4% |

Percentages based on number of respondents who selected "Other, please specify".

Question of the Week

If staffing levels [in any of the following categories] have not returned to pre-COVID-19 levels, please indicate why.



- The practice cannot afford to bring them back at this time.
- They do not want to return at this time.
- Other, please specify

Other Reasons-Dental Hygienists

| Category | Percentage of Responses |
|--|-------------------------|
| SPACING ISSUES / SOCIAL DISTANCING & SAFETY GUIDELINES | 43.0% |
| HYGIENIST SHORTAGE / UNABLE TO FILL OPEN POSITION | 36.0% |
| TEMPORARILY OUT ON FAMILY OR MEDICAL LEAVE | 9.3% |
| HYGIENIST ACCEPTED ANOTHER POSITION | 8.1% |
| HYGIENIST WORKING BUT AT REDUCED HOURS | 7.0% |

Percentages based on number of respondents who selected "Other, please specify".

Question of the Week

Is your practice currently using virtual technology/telecommunications to conduct remote problem-focused evaluations (CDT Code D0140)?



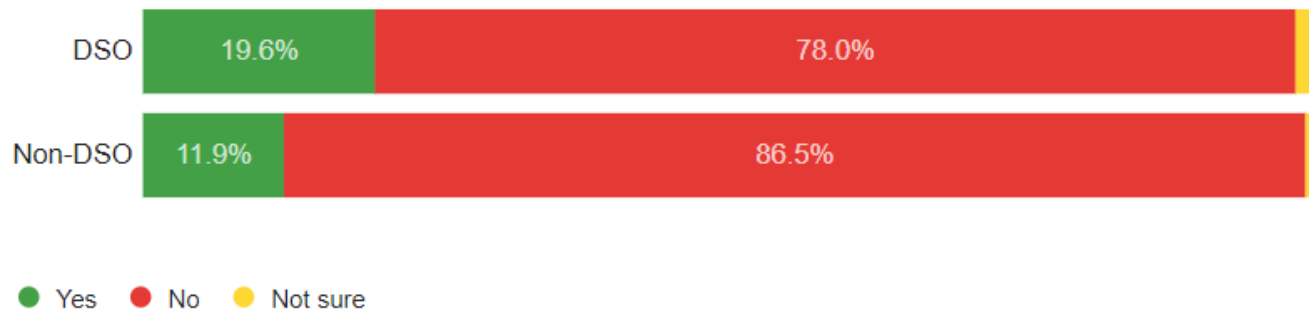
● Yes ● No ● Not sure

Question of the Week

Is your practice currently using virtual technology/telecommunications to conduct remote problem-focused evaluations (CDT Code D0140)?



By DSO affiliation-week of July 13



Insight: Teledentistry use is dropping. It appears to have been a temporary stop-gap measure during the shut-down phase of the pandemic. At least for solo and small group practices. DSOs and large group practices are far more likely to use teledentistry.

Core Questions

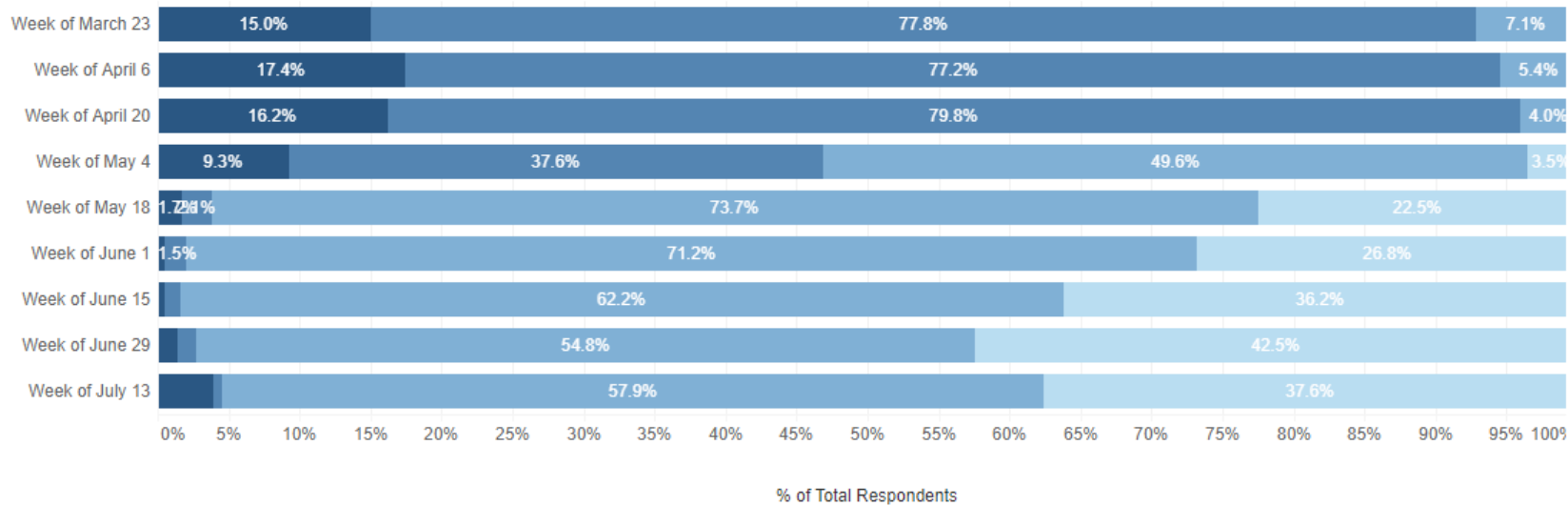
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COVID-19's
Impact on the
Dental Care Sector



What is the current status of your dental practice?



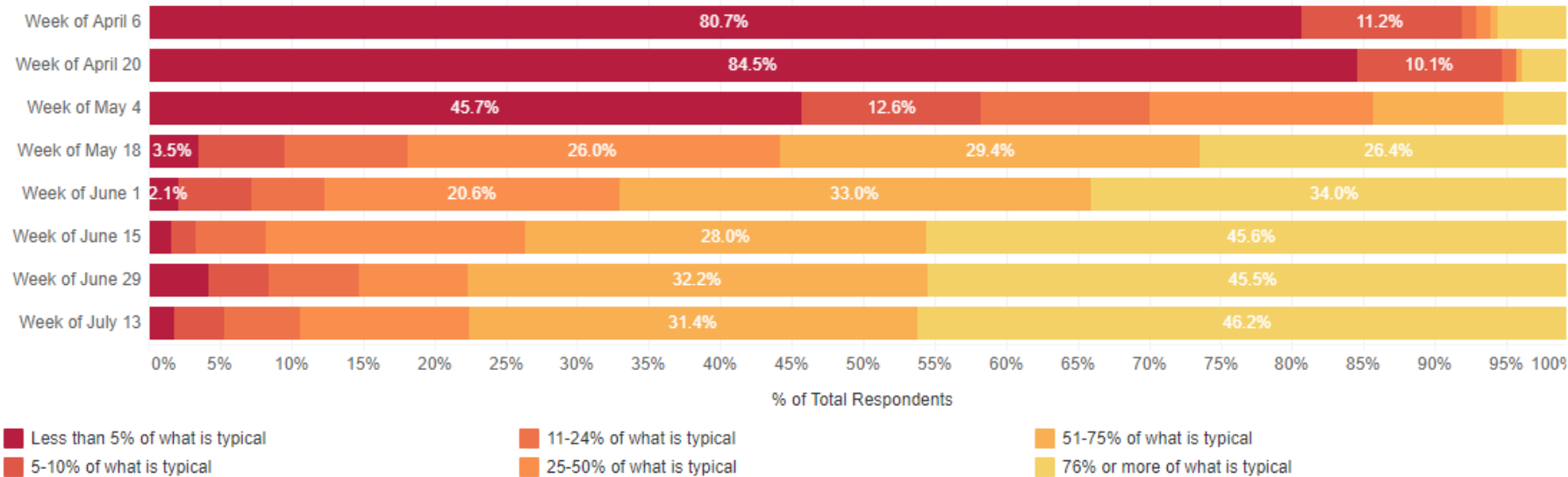
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Florida data

Core Questions



How does this week compare to what is typical in your practice, in terms of: - Total patient volume?



Florida data

Core Questions

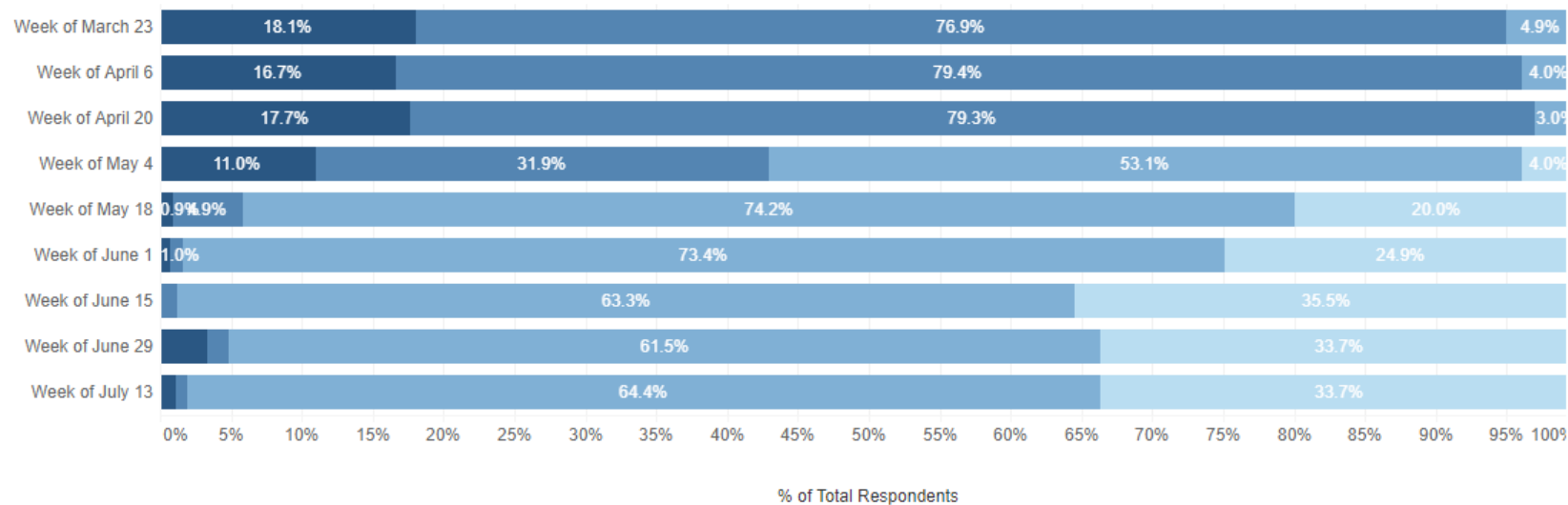
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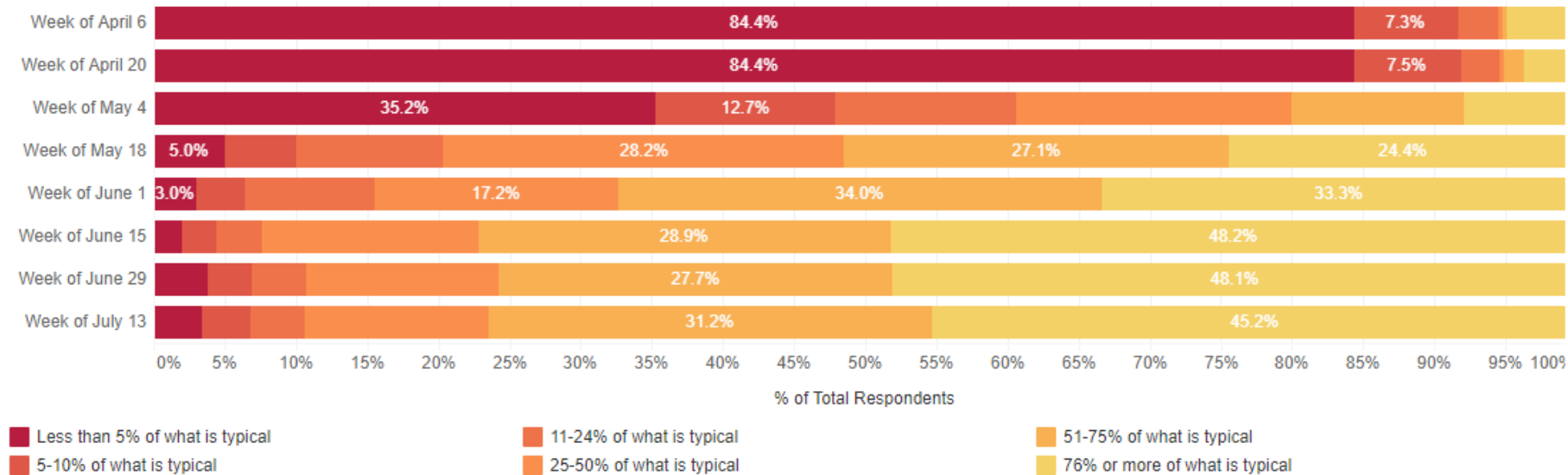


Texas data

Core Questions



How does this week compare to what is typical in your practice, in terms of: - Total patient volume?



Texas data

Core Questions

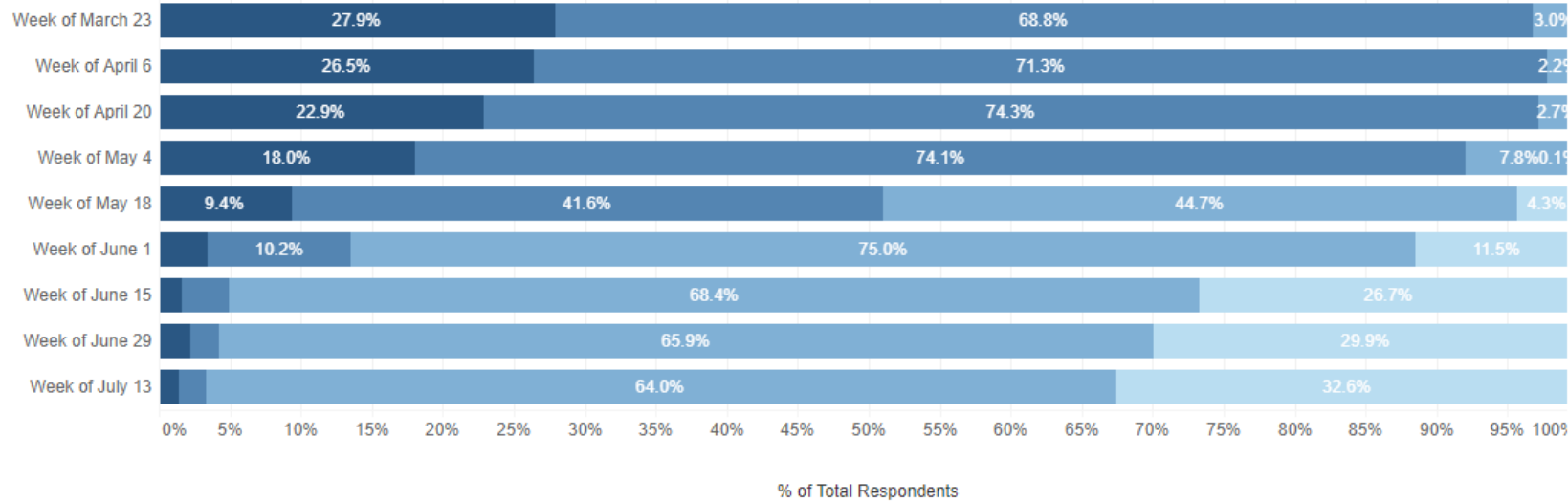
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**COVID-19's
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What is the current status of your dental practice?



California data

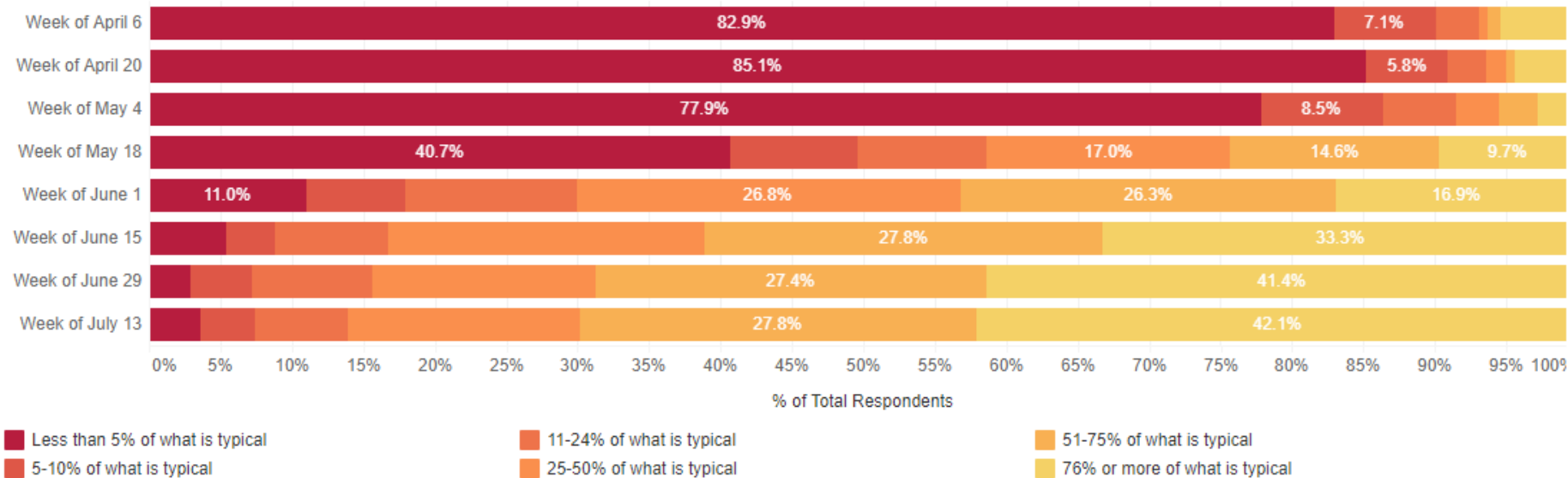
Core Questions

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**COVID-19's
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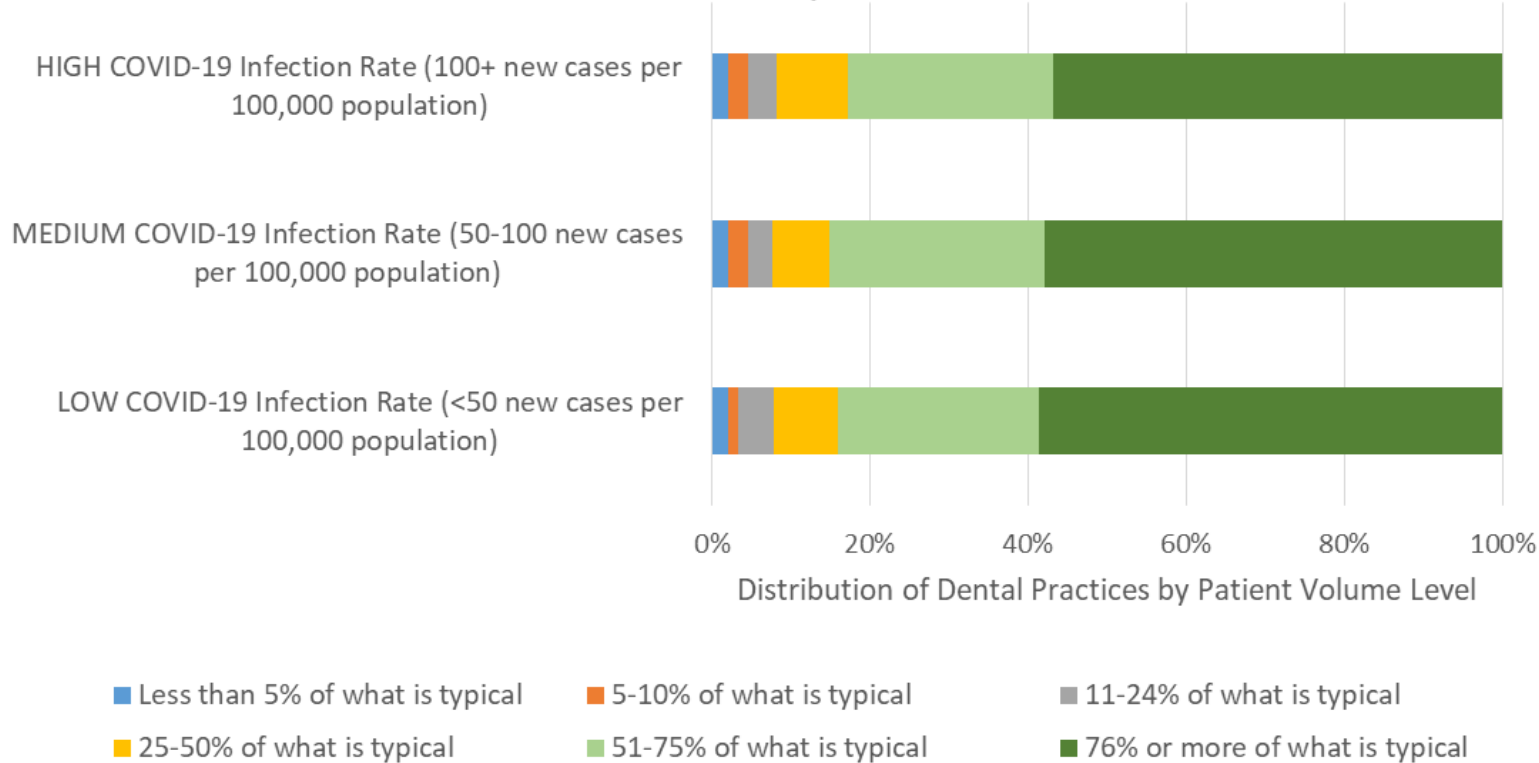
How does this week compare to what is typical in your practice, in terms of: - Total patient volume?



California data

Core Questions

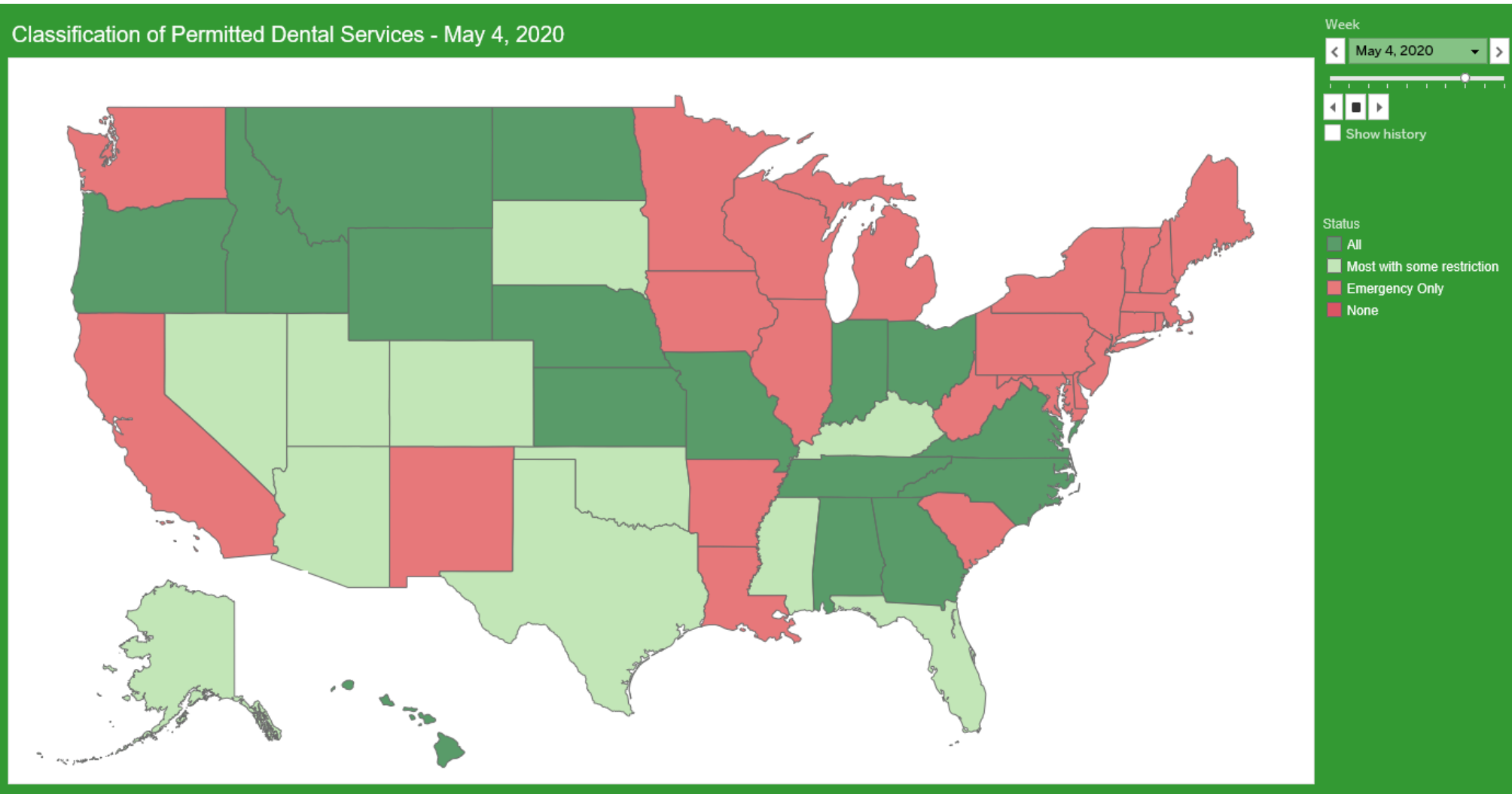
Does Patient Volume Vary by COVID-19 Infection Rate in the County?



Insight: Patient volume does not appear to be correlated with COVID-19 infection rates.

We merged county-level data on the number of new COVID-19 cases the week of July 13 with our HPI polling data on patient volume. We found little correlation.

A Closer Look at States That Opened Early

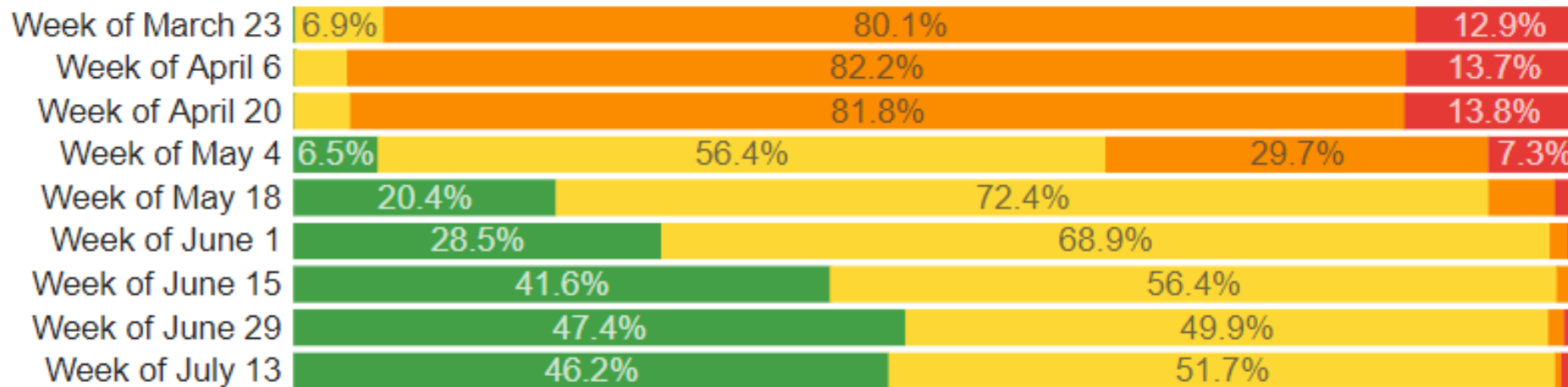


As of May 4, 27 states have re-opened for elective dental care. These states are in week 11 of re-opening.

Core Questions

What is the current status of your dental practice?

Insight: In the 27 states that have been open for elective care at least 11 weeks, 98% of dental offices are open. This has been stable for several weeks.

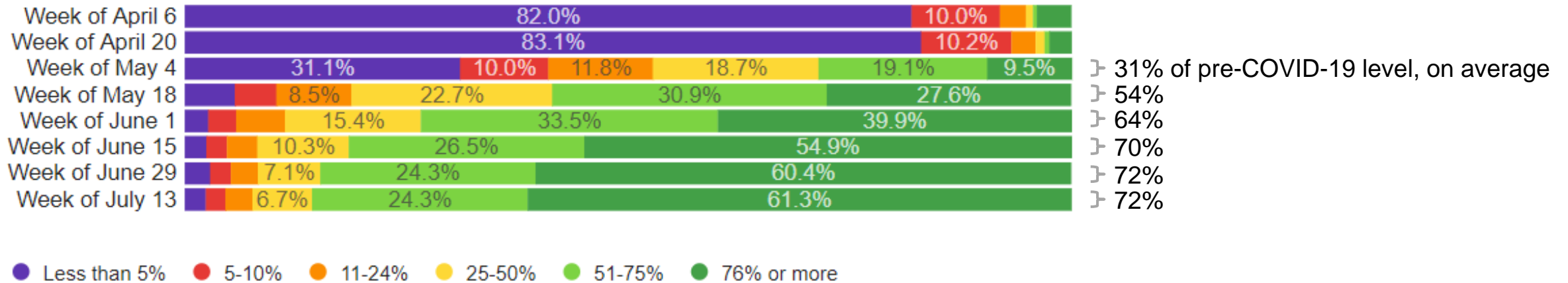


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Core Questions

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

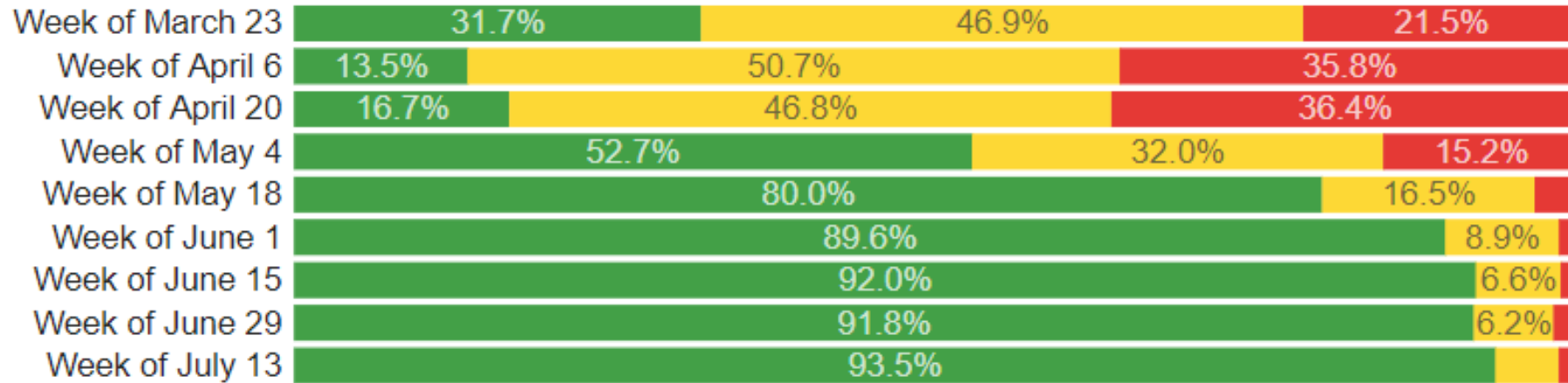
Total Patient Volume



Insight: In the 27 states that have been open for elective care at least 11 weeks, patient volume has stabilized at an estimated 72% of pre-COVID-19 levels.

Core Questions

Is your dental practice paying staff this week?



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

Insight: In the 27 states that have been open for elective care for at least 11 weeks, staffing levels are stable at just over 90% of pre-COVID-19 levels.

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:

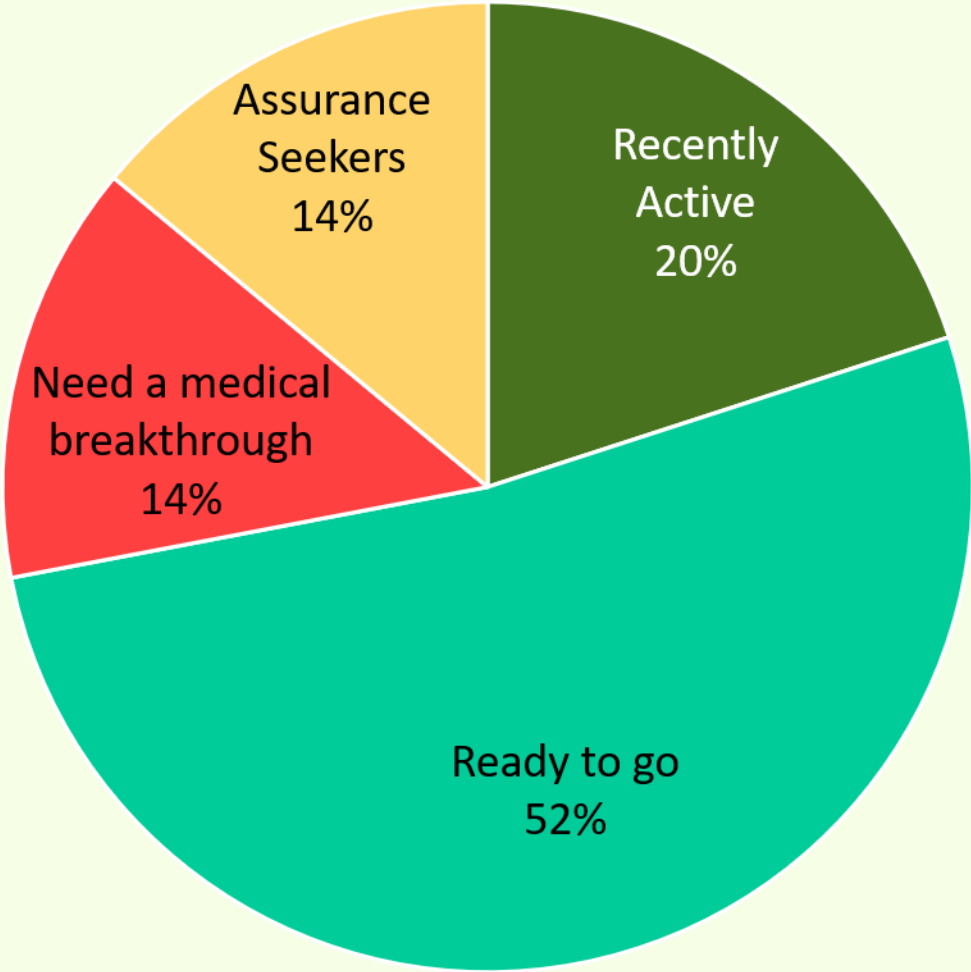
- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**

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



READY OR NOT: VISIT A DENTIST'S OFFICE

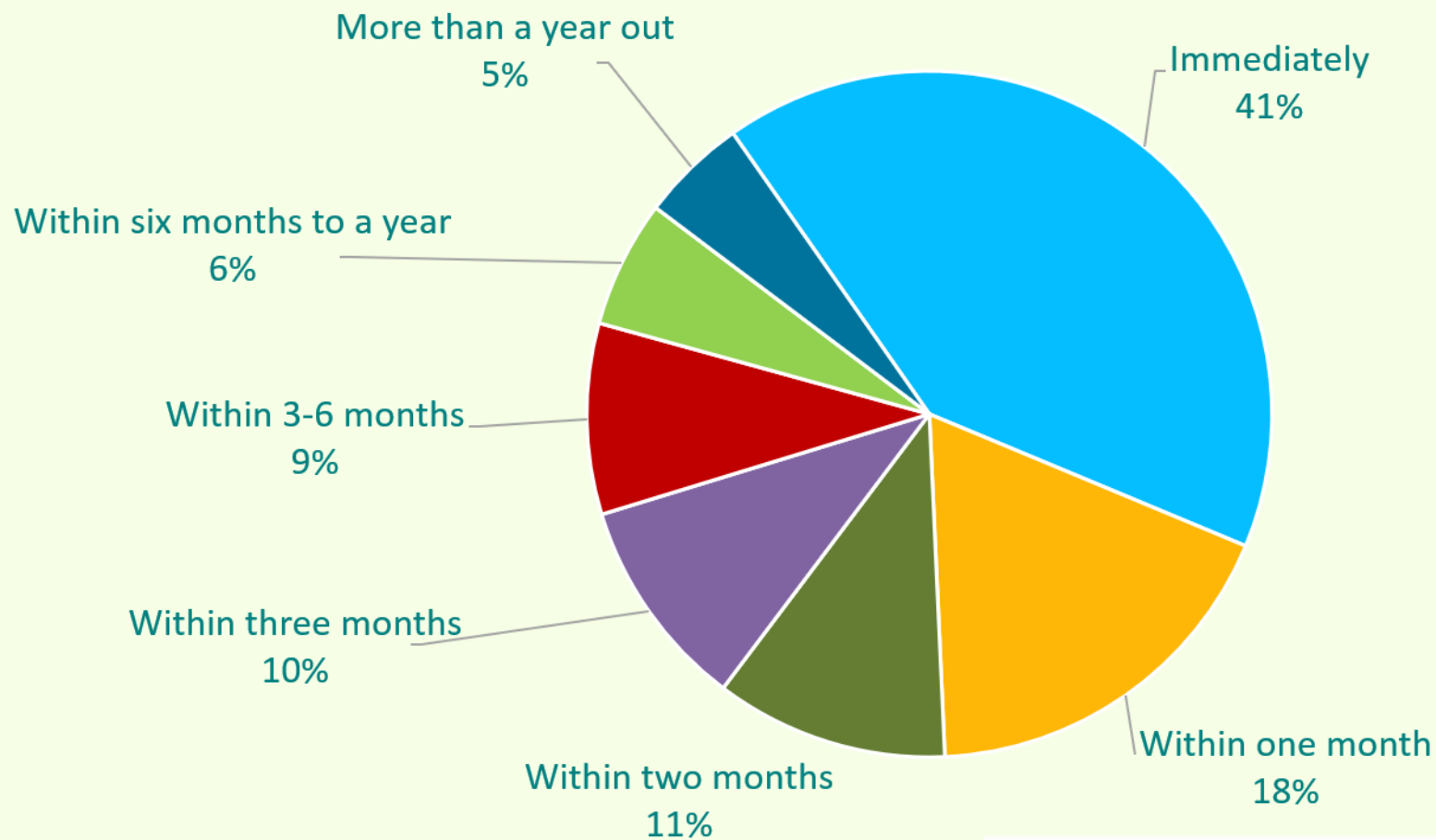
Which of the following conditions is closest to your current point of view... Visit a dentist's office



- 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.

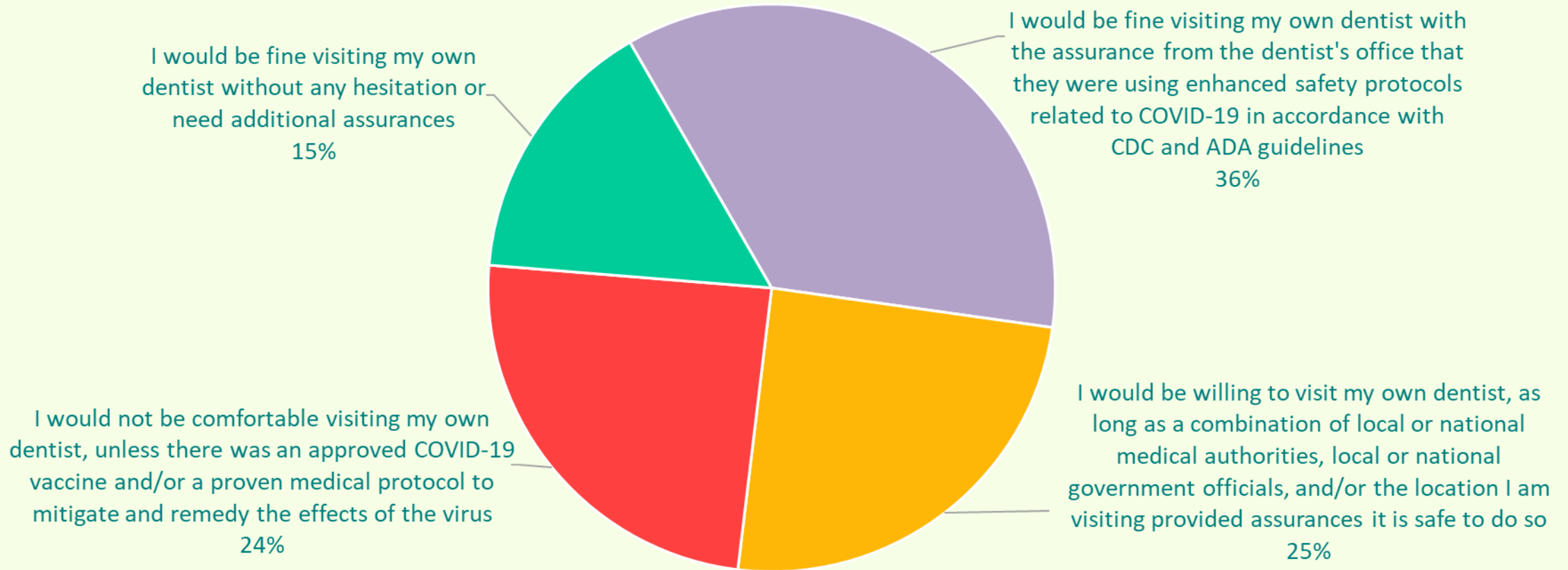
WITH ASSURANCES, 80% RETURN IN 3 MONTHS

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?



Key Take-Aways from July 13th Data

- As of the week of July 13, 98% of dental offices in the U.S. are open and patient volume is estimated at 71% of pre-COVID-19 levels. Staffing is at about 90% of pre-COVID-19 levels. These values are largely unchanged since our last wave of data collection and suggest we are reaching a “steady state” of economic activity in dental offices. At least for now.
- In Texas, Florida, and California – three states we examined that have rising COVID-19 infection rates – there does not appear to be any appreciable decline in patient volume. Broader analysis indicates little correlation, in general, between patient volume and the number of new COVID-19 cases among the population.
- New consumer polling indicates that about 72% of adults are very comfortable visiting the dentist right now and another 14% are willing to go if they had some reassurance from their dentist, the CDC, or other authorities. The remaining 14% indicate they will not visit the dentist again until there is a vaccine or proven treatment for COVID-19. Accordingly, patient volume in dental offices likely has an upper bound of around 85% of pre-COVID-19 levels. At least for now.
- Taken together, the data suggest the dental care rebound is tapering off and we are reaching – if not already in – the “new normal”.

Thank You!



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hpi@ada.org



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Question of the Week...(from last week)

Number of patients seen in practice per day



Insight: Dental practices are currently close to maximum capacity. This indicates there is very little “slack” in the system and patient volume likely cannot increase significantly. At least in the short term.