ADA Communications Trend Report: 2021

A Year of Recovery and Transition

ADA Council on Communications
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Dear Colleagues,

In 2020, we learned that our modern day world was not immune to a global health crisis. When faced with the unthinkable, we used every defensive tactic possible to protect ourselves, our families and our communities against COVID-19. Our defensive aim—in the short term—was to do our best to safeguard the profession and the public, while simultaneously borrowing time to identify and execute our long-term, offensive strategy.

This year, the tables have thankfully turned. We are able to play a strong offensive game and take every shot, every opportunity to regain ground and get back to our new normal.

Strong, evidence based science and data, combined with qualitative insights from fellow dentists and the public we serve, give us the power to plan for the future. And, that's exactly why the Council on Communications creates a yearly trend report.

The Council on Communications Trend Report is meant to surface trends and issues that matter to dentistry and the public’s oral health, so that our ADA-community can better prepare to address them—not only if, but when they become widespread.

We are a member-driven organization, and when we can help our members successfully navigate an up-and-coming issue (or concern), or even the complete unknown, that is when we truly deliver unmatched member value.

The Council’s goal is to make you aware of these bubbling themes, and the current sentiment of key audiences—giving you the blueprint to craft your own offensive strategies at a local, state, or national level to benefit and uphold member value.

With utmost respect for the Council on Communications, this Association and the power of organized dentistry, Dr. Sam Mansour

Chair, Council on Communications 2020-2021
The purpose of this report is to identify important and emerging issues for dentists and their patients, as well as gaps between dentists and the ADA, and dentists and their patients, so that they can be better understood and addressed in the future.

The impact of COVID-19, which dominated 2020, also carried into 2021. This report addresses some of its lingering effects on ADA members, students and patients:

- **ADA members** continue to be impacted by staffing issues, have concerns about providing the best and safest patient care, and feel uncertainty over their future and business profitability. But member satisfaction with the ADA's COVID-19 support remains strong.

- **Young dentists** continue to be impacted especially hard, with the additional pressure of job instability and high financial debt. One of the few areas where the ADA scored lower in 2021 was for member support for their mindfulness and wellness.

- **Dental students** also felt the impact especially strong, with the pandemic impacting their ability to develop clinical skills, the lack of in-person classes and access to faculty, and their overall motivation.

- **Patients** started returning to the dentist more regularly, but still fell short of pre-pandemic levels with just 46% visiting the dentist since COVID-19 hit in the spring of 2020. Patient DIY trends continue to be tracked, and do not appear to be increasing as a result of COVID-19.

In addition to issues that were amplified or exacerbated by the pandemic, several new issues emerged:

- **Diversity and inclusion**: Over the past year, as the ADA Presidents have spoken out about D&I and social issues, ADA member feedback has become polarized. Some embrace the opportunity for more conversation about diversity and generational differences. Others believe, as a professional association, the ADA should focus solely on dentistry.

- **Patient vaping and marijuana use**: There are now 19 states, plus the District of Columbia, that have legalized the recreational use of marijuana. As legalization and use continues to increase, oral health issues unique to vaping and marijuana use are beginning to emerge and increase, along with a lack of awareness and understanding of the adverse health effects among the patients who use them.

And finally, to track the benchmarks established in the 2020 inaugural annual report, this report includes a Report Card on page 23 with updated member feedback on “How well is the ADA supporting you on (various) topics?” In nearly every case, member satisfaction is higher in 2021 than 2020, but there is still room for improvement in areas such financial, insurance and wellness support.
The list below summarizes the surveys that were deployed by the ADA in late 2020 and 2021. Key learnings from those surveys are highlighted in this report. More comprehensive results from any of these surveys are available upon request.

- **Dentist Trend Report Survey** – Online survey to the Advisory Circle research panel of member dentists. Fielded in March 2021 with 760 respondents.
- **Consumer Trend Report Survey** – Online survey to 1,000 consumers fielded in May 2021. Responses balanced to be representative of US population as a whole.
- **Member Value Survey** – Annual online survey to rank and file members. Fielded in December 2020 with 986 respondents.
- **Dental Student Survey** – Online survey to D1-D4 dental students. Fielded in February 2021 with 1,385 respondents.
Shortly after the pandemic began, the ADA Health Policy Institute started measuring the effects of COVID-19 on the U.S. dental economy, dentists’ delivery of care, financial sustainability, and overall attitude toward their profession.

As of mid July 2021, 68% of HPI’s survey respondents cite being back to “business as usual.” However, there are still 31% who report being open but having “lower patient volume than usual.”

This section of the report explores members’ perceptions of the ADA’s COVID support for them over the past year, and some of the key professional and personal issues that have emerged, amplified or continue to linger as a result of the pandemic.

*Verbatim comments from the online survey to the Advisory Circle research panel in March 2021.
The Lingering Impact of COVID-19

Top 4 reasons COVID-19 related

The very first question asked of the new Advisory Circle panel of ADA members four years ago was repeated in March 2021, with some significantly different results.

The impact of COVID-19, which disrupted every aspect of their lives and practices is still reflected in many of the reasons over a year and a half later.

There was a shortage of hygienists prior to COVID and it has become worse following the pandemic.*

Basically COVID has caused and continues to cause many, many problems.*

Keeping my patients safe and ensuring COVID doesn’t spread in my office*

Am I going to recover from the impact the pandemic has had on the finances of my practice?*

*Verbatim comments from online survey to Advisory Circle research panel in March 2021.
The Lingering Impact of COVID-19

#1 highest rated ADA support 2 years in a row

In response to the COVID-19 crisis in 2020, the vast majority of ADA staff and resources were refocused to deliver information and support on COVID-19 to dentists, the profession and public. Member satisfaction for this support exceeded all other member benefit categories.

In 2021, high member satisfaction continued as the ADA pivoted to vaccine support, and the “very effective” rating increased 10% over 2020.

How Effectively is the ADA Supporting You on COVID-19?

<table>
<thead>
<tr>
<th>Year</th>
<th>Very or Somewhat Effective</th>
<th>Not Very Effective</th>
<th>Not at All Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>52%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>2021</td>
<td>62%</td>
<td>4%</td>
<td>1%</td>
</tr>
</tbody>
</table>

92% very or somewhat effective

93% very or somewhat effective

(10% higher “very effective” rating than 2020)
2021 member satisfaction for the ADA’s support for safe dental visits also exceeded 2020 results by 3% overall, and increased by 9% who felt the ADA’s support was “very well.”

In addition to patient toolkits that were provided to members, the ADA’s consumer site Mouthhealthy.org continues to promote the safety and effectiveness of the vaccine and provide information to encourage patients’ return to the dentist.

The Lingering Impact of COVID-19

How Well is the ADA Supporting You on this Public Health Topic: COVID-19 and Dental visits?

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Well</th>
<th>Fairly Well</th>
<th>Not Well</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>50%</td>
<td>40%</td>
<td>9%</td>
</tr>
<tr>
<td>2021</td>
<td>59%</td>
<td>34%</td>
<td>4%</td>
</tr>
</tbody>
</table>

2021: 93% very or fairly well (9% higher “very well” rating than 2020)

2020: 90% very or fairly well
Overall wellness concerns heightened during the pandemic, but are expected to remain well beyond the initial crisis. Younger dentists continue to be impacted especially hard, with the additional pressure of job instability and high financial debt.

Over the past year, the ADA increased its wellness content and resources, but the feedback implies that much more is still needed.

*Verbatim comment from online survey to Advisory Circle research panel in March 2021.
The Lingering Impact of COVID-19 on Dental Students

Dental school students have also been feeling the impact of COVID-19. In a survey fielded in February 2021, the biggest challenges they anticipate after graduation (below) are being exacerbated by the COVID-related issues listed on the right.

How has the pandemic impacted your dental school studies?*

- **Clinical skills and gaining experience**
  - About half of all comments touched on this topic, with many voicing frustration that COVID was complicating and delaying their ability to develop clinical skills.

- **Online class and access to faculty**
  - Roughly one third of respondents voiced frustration at having no in-person class time or direct one-on-one access to faculty.

- **Time management and motivation**
  - Postponement of classes and other events, along with limited interaction with other students has led to motivation challenges for many students. One in four comments related to this topic.

*Online survey fielded to all dental school students in February 2021. 1,385 respondents.

**70%**
the business side of dentistry

**66%**
financial challenges

**57%**
finding the right job

**53%**
clinical proficiency
The Lingering Impact of COVID-19 on Patients

In September 2020, six months after the pandemic hit, only 31% of US adults reported visiting the dentist.* A year after the pandemic hit, that number rose to 46%.*

- The youngest adults and those with higher income and education visited the dentist more than other adults.
- Those with lower income levels reported more adverse affects on their oral health.
- 25-34 year olds reported better oral health more than any other age group.

Have you visited the dentist since COVID-19 was declared a pandemic?**

- 46% Yes
- 54% No

How would you assess your dental health since COVID-19 was declared a pandemic?**

- Much worse: 5%
- Slightly worse: 12%
- No change: 59%
- Slightly better: 14%
- Much better: 10%

*Online survey fielded to 1,000 U.S. adults that mirror the U.S. Census in September 2020
**Online survey fielded to 1,000 U.S. adults that mirror the U.S. Census in May 2021
Why is Diversity and Inclusion important for the ADA?

Dental students are more than half female, almost 48% are racially/ethnically diverse and 20% of new dentists practice in a multi-state large group practice setting. As they enter the workforce, they’re looking for communities that reflect what they value — and this includes diversity and inclusion.

Not aligning with the growing diversity in the market and with what new dentists value, poses great risk to the ADA – continued loss of market share to below 50% over time. An organization with marginal contributions from our young and diverse dentists will lead to a loss of credibility, and we will no longer be relevant.

As a female immigrant dentist who’s had to overcome many barriers to be where I am, speaking strictly on my own behalf, I never felt supported by ADA.*

*Member response to June 17, 2021 Message from the ADA President.
Diversity and Inclusion – Generational Shifts in Membership

**Newer generations** of dentists are more diverse. Over 50% of dental students are women, and 48% are racially/ethnically diverse. They’re entering the profession with different mindsets around the ADA’s alignment with their values.

**Traditional ADA members** are retiring and exiting the profession, a trend that COVID-19 appears to be accelerating.
Over the past year, as the ADA Presidents have spoken out about D&E and social issues, ADA member feedback has been mixed. Some embrace the opportunity for more conversation about diversity and generational differences. Others believe, as a professional association, the ADA should focus only on dentistry.

New research is underway to identify the intersection between dentists’ values and the value of ADA membership, and to get at the heart of the intangible reasons for joining professional associations such as the ADA.

This is the first messaging from ADA, in regards to inclusion, that feels thorough and “real.” I can’t think of the right words to put it into, but this message is very much appreciated.*

The fact that this SJW (social justice warrior) equity and systemic racism garbage has seeped into our national and state level professional organizations is truly disturbing.*

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**84 responses received from the June 17, 2021 Message from the ADA President. 27 positive (21% Silent Generation, 33% Baby Boomer, 42% Gen X, 4% Millennial) (58% male responses). 55 negative (9% Silent Generation, 45% Baby Boomer, 34% Gen X, 11% Millennial) (89% male responses), 2 neutral.

**129 responses received from the March 13, 2021 Message from the ADA President. 24 positive (41% Silent Generation, 54% Baby Boomer, 4% Gen X, 0% Millennial) (71% male responses), 105 negative (12% Silent Generation, 67% Baby Boomer, 19% Gen X, 2% Millennial) (98% male responses).
The effectiveness ratings for Diversity and Inclusion have made a slight improvement in 2021, perhaps due to the increased visibility of the ADA Presidents’ messages on social justice topics. But as addressed on the previous slide, member opinions are divided on how visible and proactive the ADA should be. Significant increases on these effectiveness ratings are not likely until those issues are resolved.
Diversity and Inclusion – Experienced or Observed Prejudice

As part of its Diversity and Inclusion efforts, the ADA began tracking this question two years ago.

To continue to address and reduce the observations and experiences of prejudice, the ADA is working at the national, state and local levels with leadership, staff and members to build a more diverse, inclusive and equitable culture for all dentists.

Have you personally experienced or observed prejudice (either intentional or unintentional) in the ADA (national, state or local) within the last five years?*

Of those who said Yes

94% No

6% Yes

What type of prejudice did you experience or observe?*

- Race/ethnicity: 56%
- Gender: 48%
- Social/political beliefs: 23%
- Age: 21%
- Practice setting: 19%
- Religious affiliation/beliefs: 17%
- Other: 15%

*Online survey fielded to rank and file ADA members in December 2020. 986 respondents. +/- 3% margin of error.
DIY dentistry continues to rise and is important to continue monitoring, especially with the proliferation of social media posts and challenges. Not surprisingly, younger adults research oral health related information on the internet more than older adults, and they also report seeing more oral health information on social media than older adults. Black and Asian ethnicities also research more on the internet and report seeing more oral health information on social media, more than twice as much as other ethnicities. Older, more educated, more affluent adults seek out a dentist more than the other groups.

*Response in online survey fielded to ADA Advisory Circle members in June 2021*
Patient DIY Attempts

28% of U.S. adults surveyed said they have attempted to correct a dental issue without the help of a dentist or other professional help.

50% of U.S. adults surveyed said they would feel very or somewhat comfortable discussing DIY dentistry with their dentist.

How likely would you be to try to perform dental work on yourself at home?

- 11% Very likely
- 12% Somewhat likely
- 14% Neither likely nor unlikely
- 50% Very unlikely

In a survey to U.S. adults, they were asked “Have you or would you consider using DIY kits for any of the following”:

- Tooth whitening: 29% Have used, 44% Would consider, 22% No, 5% Not sure
- Mouthguards: 13% Have used, 41% Would consider, 38% No, 9% Not sure
- Snoring appliances: 8% Have used, 38% Would consider, 44% No, 10% Not sure
- Tooth straightening: 7% Have used, 29% Would consider, 56% No, 8% Not sure
- Filling a gap for a missing tooth: 7% Have used, 26% Would consider, 59% No, 9% Not sure
- Place a veneer over a tooth: 5% Have used, 26% Would consider, 59% No, 10% Not sure
- Tooth filing: 9% Have used, 20% Would consider, 63% No, 8% Not sure
- Personal dental scaler: 5% Have used, 24% Would consider, 56% No, 16% Not sure
- Filling a cavity: 9% Have used, 19% Would consider, 65% No, 8% Not sure

Adults who have attempted DIY dentistry tend to be:
- Younger age ranges
- Hispanic, more frequently than any other ethnicities
- Caregivers, more frequently than those who are not

Those “very” or “somewhat” or likely decreased by 8% since 2019.
In 2021, four states (Connecticut, New Mexico, New York, and Virginia) passed legislation to legalize marijuana for recreational purposes. There are now 19 states, plus the District of Columbia, that have legalized the recreational use of marijuana.

As legalization and use continues to increase, oral health issues unique to vaping and marijuana use are beginning to emerge and increase, along with a lack of awareness and understanding of the adverse health effects among the patients who use them.

This new section explores current public understanding of the issues and risks, and additional issues being reported by the dentists who treat patients who vape and use marijuana.
There is higher public awareness of the oral health impact of vaping over marijuana use.

However, just 28% would be substantially influenced to not vape and 23% would be substantially influenced to not use marijuana if they learned of negative impacts on their oral health.

This provides an opportunity for the ADA to increase its educational communication efforts on these topics.
As legalization of marijuana use continues to expand across the U.S., dentists’ protocols are also changing. 61% of members surveyed now screen for vaping and/or marijuana use. 24% of members surveyed are also seeing more issues relating to vaping and/or marijuana use.

And while 67% of adults surveyed said they would be very or somewhat comfortable discussing their marijuana use with their dentist, as noted on the previous slide, only about 50% said they could be substantially or moderately influenced about the adverse health effects.

57% of ADA members surveyed report increased marijuana/CBD usage among their patients.

61% of ADA members surveyed screen patients for marijuana use and/or vaping.

67% of U.S. adults surveyed said they would be very or somewhat comfortable discussing their marijuana use with their dentist.

24% of ADA members surveyed have seen more patients with issues relating to marijuana use and/or vaping.

Of those who reported an increase, they are seeing these issues:

- Poor home care: 81%
- Periodontal issues: 75%
- Increased caries rates: 64%
- Bruxism: 39%
- Harder to anesthetize these patients: 28%
- Other: 9%
# 2020 Report Scorecard

This report has helped highlight areas of support that are effectively meeting member needs, and those that require further attention and resources. Overall most of the topics improved over 2020. Areas that performed particularly low in 2020, such as insurance support, received additional cross-divisional support this past year, and the impact of those efforts are being reflected in an increase of 10% satisfaction over 2020.

<table>
<thead>
<tr>
<th>How effectively is the ADA supporting you on…</th>
<th>2020 Very effective</th>
<th>2021 Very effective</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>COVID-19 Practice support</td>
<td>52%</td>
<td>62%</td>
<td>▶️10%</td>
</tr>
<tr>
<td>Advocacy</td>
<td>50%</td>
<td>53%</td>
<td>▶️3%</td>
</tr>
<tr>
<td>COVID-19 Vaccination support</td>
<td>N/A</td>
<td>49%</td>
<td>N/A</td>
</tr>
<tr>
<td>Regulatory requirements</td>
<td>39%</td>
<td>43%</td>
<td>▶️4%</td>
</tr>
<tr>
<td>Inclusion/Diversity</td>
<td>20%</td>
<td>23%</td>
<td>▶️3%</td>
</tr>
<tr>
<td>Loan forgiveness / Financial resources</td>
<td>21%</td>
<td>22%</td>
<td>▶️1%</td>
</tr>
<tr>
<td>Insurance support</td>
<td>10%</td>
<td>20%</td>
<td>▶️10%</td>
</tr>
<tr>
<td>Business/Practice management</td>
<td>19%</td>
<td>19%</td>
<td>0%</td>
</tr>
<tr>
<td>Mindfulness/Wellness</td>
<td>15%</td>
<td>16%</td>
<td>▶️1%</td>
</tr>
<tr>
<td>Midlevel providers</td>
<td>9%</td>
<td>13%</td>
<td>▶️4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How well is the ADA supporting these public health topics…</th>
<th>2020 Very well</th>
<th>2021 Very well</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>COVID-19 and dental visits</td>
<td>50%</td>
<td>59%</td>
<td>▶️9%</td>
</tr>
<tr>
<td>Water Fluoridation</td>
<td>47%</td>
<td>57%</td>
<td>▶️10%</td>
</tr>
<tr>
<td>Opioids/Pain management</td>
<td>46%</td>
<td>52%</td>
<td>▶️6%</td>
</tr>
<tr>
<td>Amalgam</td>
<td>25%</td>
<td>35%</td>
<td>▶️10%</td>
</tr>
<tr>
<td>Vaping</td>
<td>22%</td>
<td>33%</td>
<td>▶️11%</td>
</tr>
<tr>
<td>HPV Vaccination</td>
<td>19%</td>
<td>32%</td>
<td>▶️13%</td>
</tr>
<tr>
<td>Teledentistry</td>
<td>13%</td>
<td>27%</td>
<td>▶️14%</td>
</tr>
<tr>
<td>DIY Dentistry (combined with Teledentistry in 2020)</td>
<td>13%</td>
<td>25%</td>
<td>▶️12%</td>
</tr>
</tbody>
</table>
Where do ADA Members Access Current, Trusted Information?

- The ADA is cited as the top source for members.
- AGD and Dentaltown are the most frequently cited non-ADA sources.
- Google has been cited #1 in past surveys of nonmembers.

(They could select up to 4)

- ADA: 90%
- State/local societies: 65%
- Friends/Colleagues: 51%
- Non-ADA publications: 24%
- Google: 18%
- Non-ADA websites: 15%
- Social media: 15%
- Newsfeeds: 6%
- Other: 5%

Newsfeeds text entry: 4 mentions of AGD & DentalTown, 3 mentions of Medscape
Non-ADA pubs text entry: 40 mentions of AGD, 15 mentions of DentalTown, multiple mentions of specialist journals
Non-ADA websites: 14 mentions of AGD, 19 mentions of DentalTown, 10 mentions of CDC, 10 mentions of Spear
A real-time, constantly-evolving data exchange is our roadmap for handling future threats. The 2021 Council on Communications Trend Report serves you by providing a pulse on the issues bubbling up among our members, and those we would like to see join our Association.

Using the results from this trend report as a guide, the ADA will continue monitoring the following current and emerging areas where the public and profession converge on topics relating to the practice of dentistry and public health, including:

- **The impact of COVID-19** – on dentists’ practices, and patients’ willingness to return to the dentist at pre-pandemic levels
- **Diversity and inclusion** – within the profession, and its impact on the communities they serve
- **The impact of vaping and marijuana use** – adapting to the increased levels of legalization across the country and its impact on patients’ oral health and the practice of dentistry
- **DIY/teledentistry** – continuing to monitor new consumer trends and threats to their oral health

Strategies for how to proactively approach these topics will continue to be the predominant subject for the ADA volunteer leadership and staff as they are prioritized among the strategies of the Common Ground 2025 plan.

On a grassroots level, these topics also provide rich territory to explore with regard to how a thoughtful, real-time exchange of information to your state and local members can prepare us all to weather upcoming storms and continue offering unrivaled member value.