

The Impact of COVID-19 on the Dental Care Sector

Insights from Data for Week of August 24th

Today



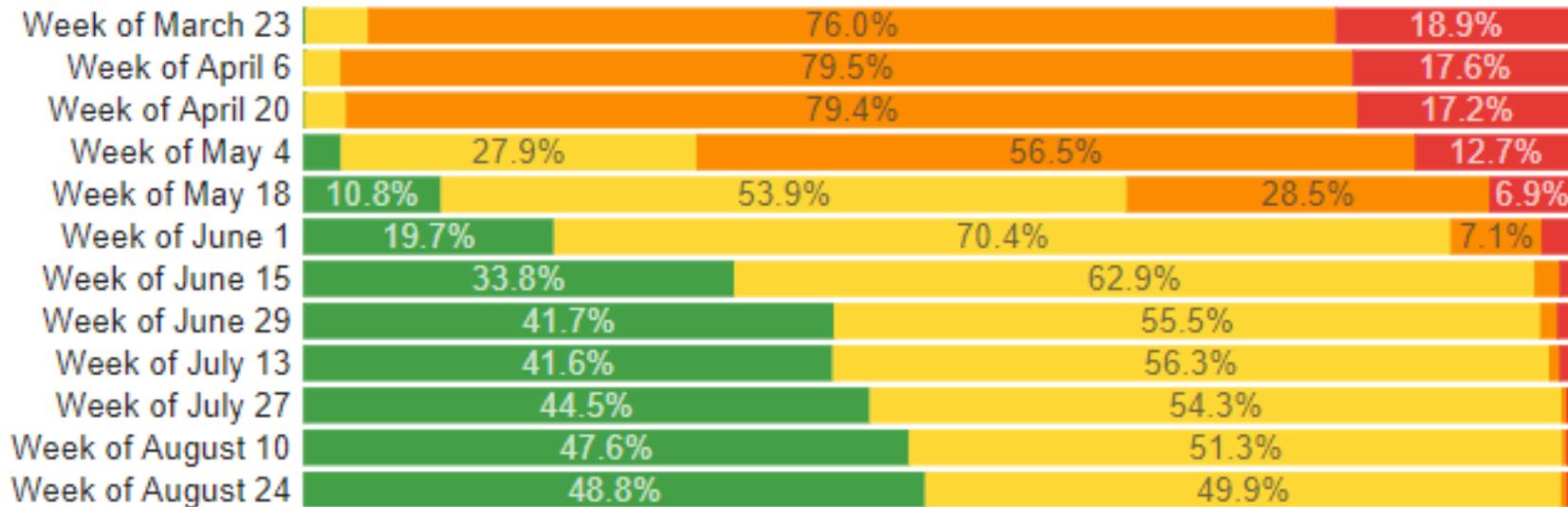
1. *Update on the latest data from HPI economic impact of COVID-19 tracking poll.*
2. *'Question of the Week' data focusing dentist wellness.*
3. *The latest consumer sentiment data related to dental visits.*

HPI Impact of COVID-19 Tracking Poll

- Bi-weekly poll beginning March 23rd.
- Core measures: Status of your practice, volume of patients and collections, status of practice staff, PPE supply.
- “Question(s) of the Week”.
- Nationally representative sample of about 4000 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?



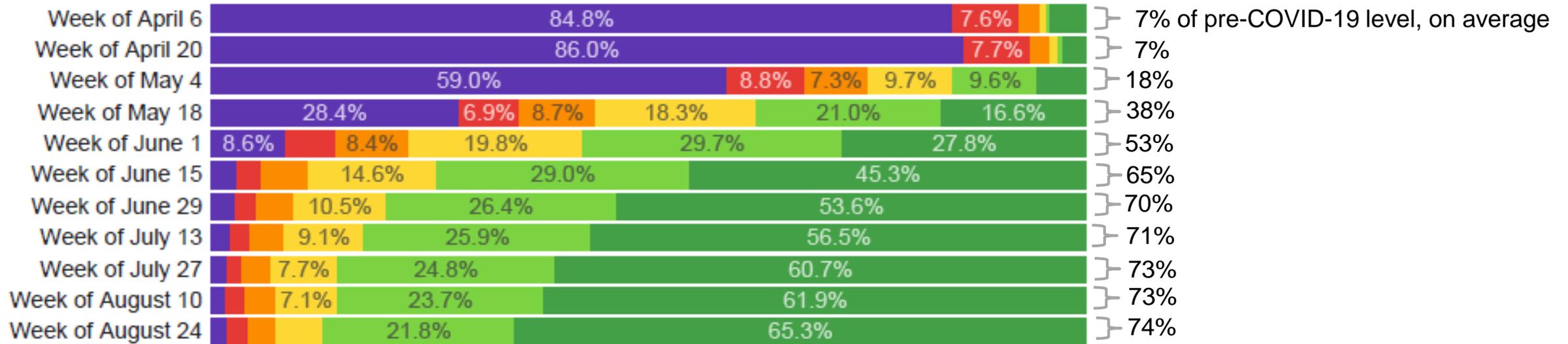
- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

Insight: As of the week of August 24th, nearly 99% of dental practices in the U.S. were open. More practices report “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

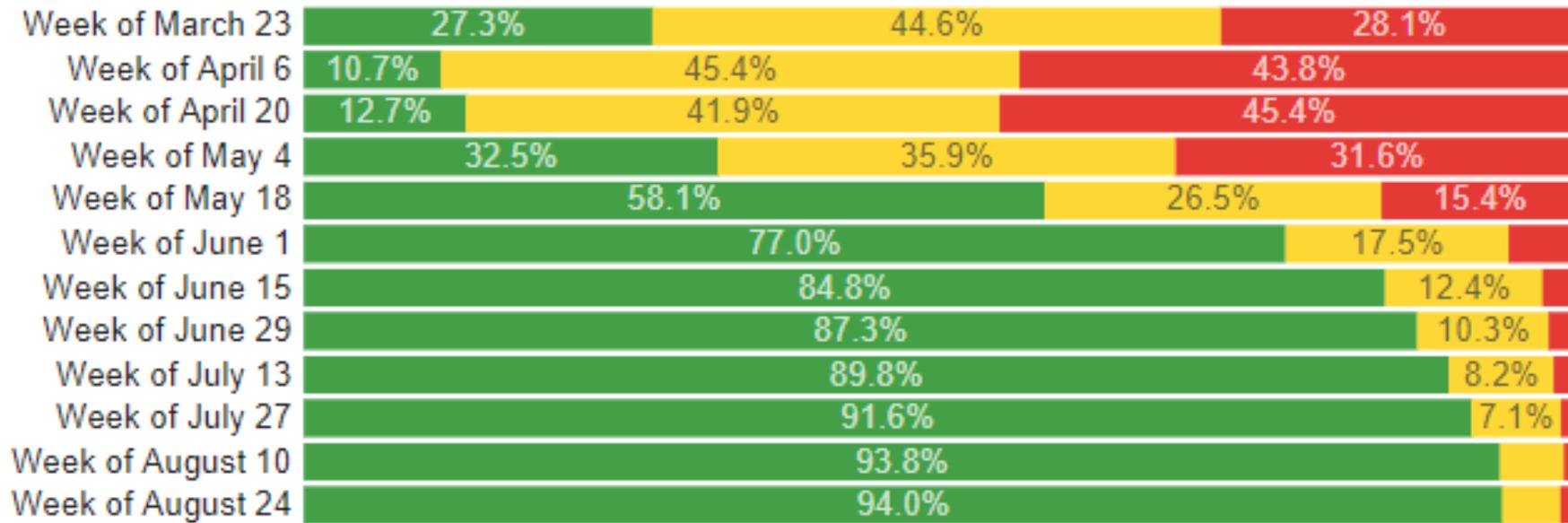


● Less than 5%
 ● 5-10%
 ● 11-24%
 ● 25-50%
 ● 51-75%
 ● 76% or more

Insight: Nationally, patient volume is leveling off. Patient volume in private practices is estimated at 74% of pre-COVID-19 levels as of the week of August 24th, largely unchanged over the past month.

Core Questions

Is your dental practice paying staff this week?

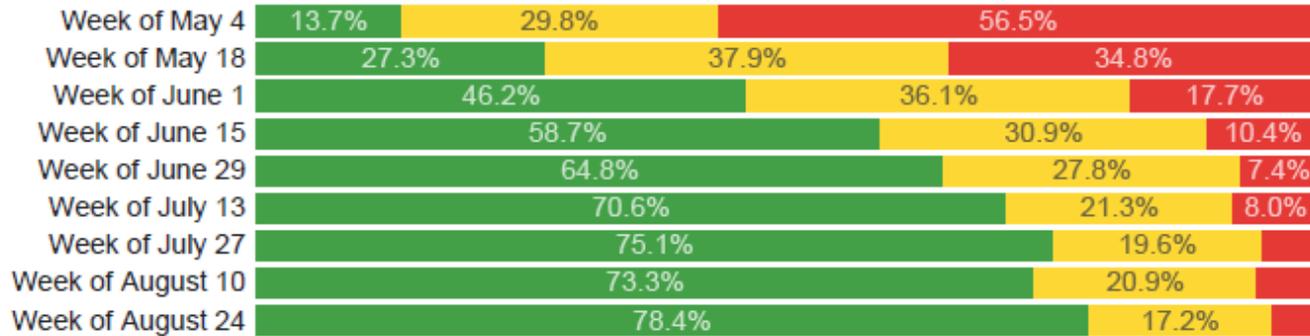


● Yes, fully ● Yes, partially ● Not paying any staff

Insight: Staffing in dental practices continues to slowly grow and is at 94% of pre-COVID-19 levels the week of August 24th.

Core Questions

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



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

[If Not Being Paid at All] Are you currently receiving unemployment benefits?



● Yes ● I've applied, but have not received any benefits yet ● No, my application was not approved
● No, I have not applied

Insight: Employee dentists have seen the biggest lingering employment effect. Nearly 80% of employee dentists are now being paid fully.

For those not being paid at all, less than half are receiving unemployment benefits, an increase since the week of August 10th.

Core Questions

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

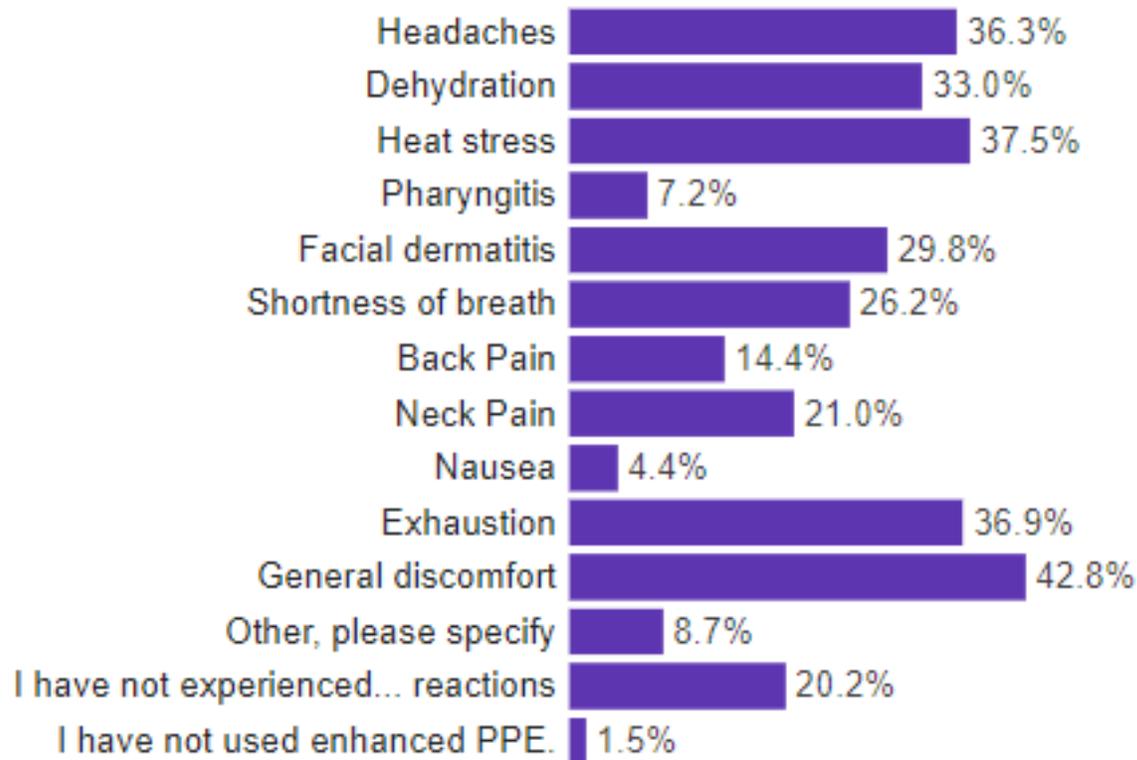


● 0 days ● 1 to 7 days ● 8 to 14 days ● More than 14 days ● Not sure

Insight: PPE availability in dental practices has been stable for several weeks now. Gowns and N95/KN95 masks remain the biggest issue.

Questions of the Week

As a result of the COVID-19 pandemic, dental practices now use enhanced Personal Protective Equipment (PPE). Please indicate if you have experienced any of the following types of physical reactions as a result of using enhanced PPE. (Select all that apply.)

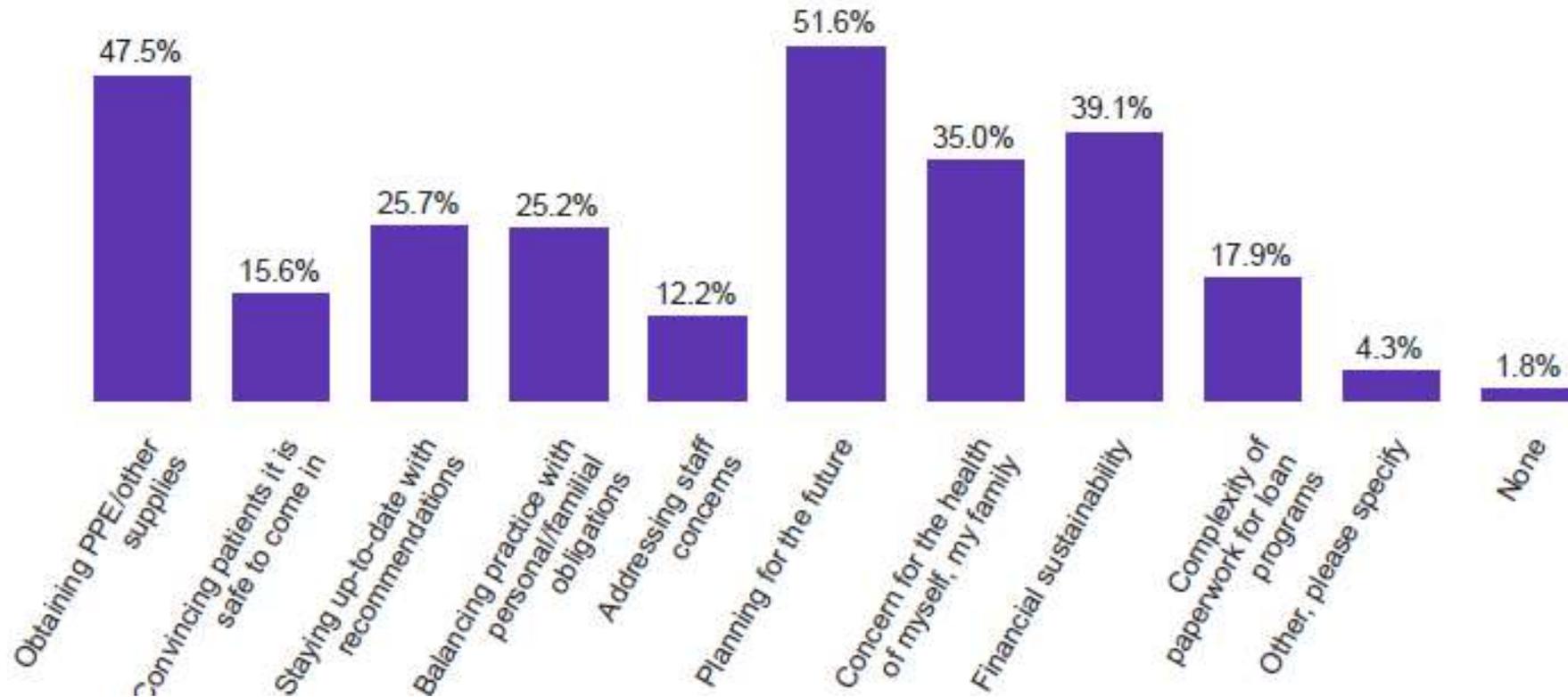


Insight: Four out of five dentists have experienced physical reactions due to using enhanced PPE.

General discomfort, heat stress, exhaustion, and headaches were most commonly reported.

Questions of the Week

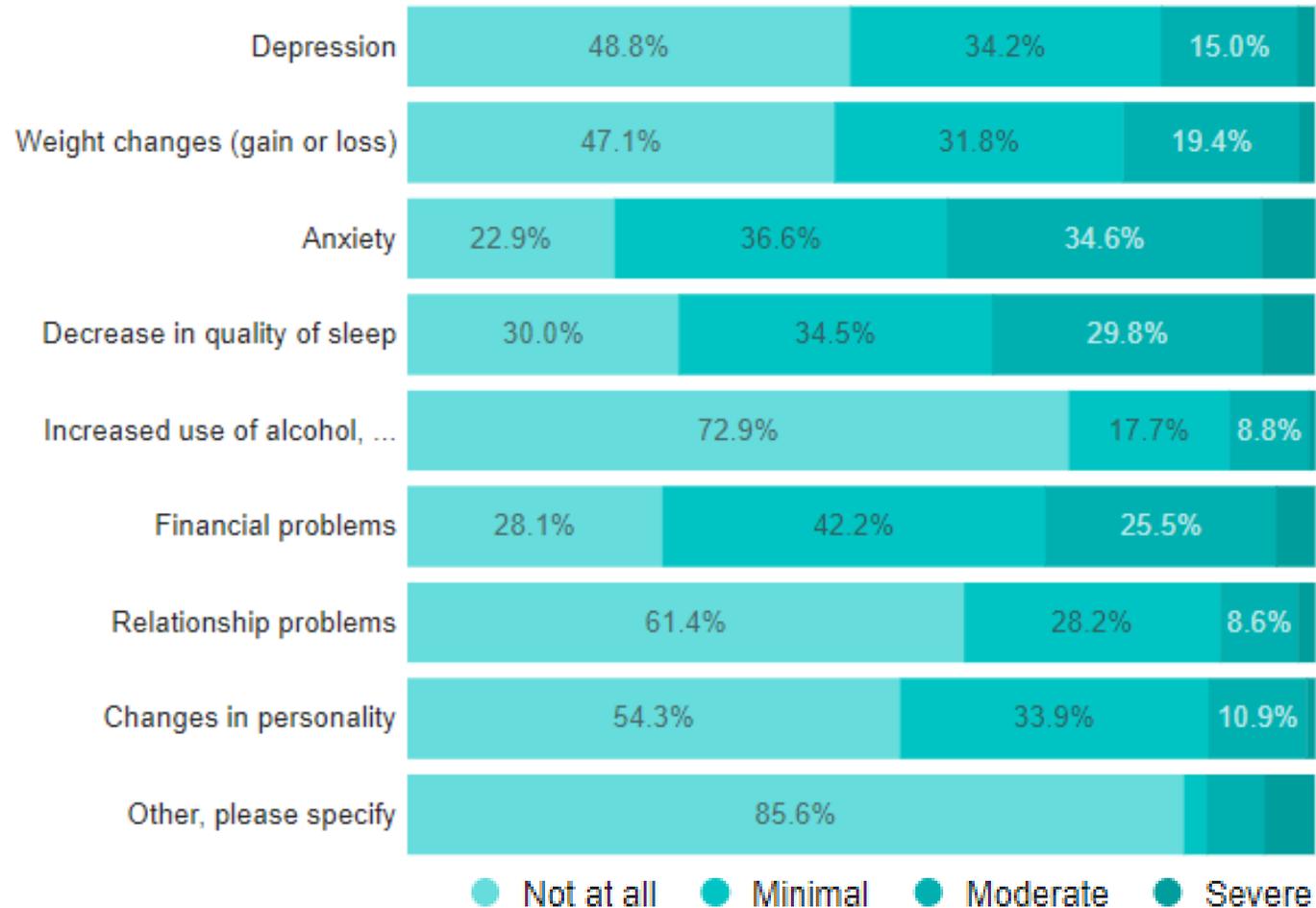
What issues are currently the most challenging to you during the COVID-19 pandemic?
(Select up to 3 responses.)



Insight: Planning for the future, obtaining PPE and other supplies, financial sustainability, and concern for health were the most commonly reported practice-related challenges due to the pandemic.

Questions of the Week

Have you experienced any of the symptoms listed below during the COVID-19 pandemic?



Insight: Anxiety, financial problems, and decreased quality of sleep were the most commonly reported symptoms associated with the pandemic.

Depression and weight changes were also indicated for the majority of the panel.

One-quarter have experienced increase use of alcohol, cigarettes, or drugs.

Insights from Consumer Polling



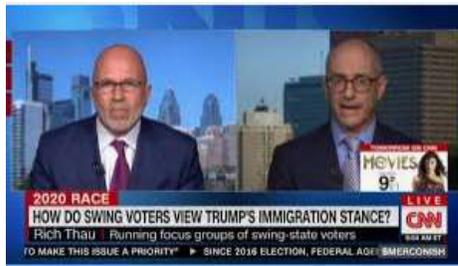
AMERICA STANDS AT AN INFLECTION POINT.

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:

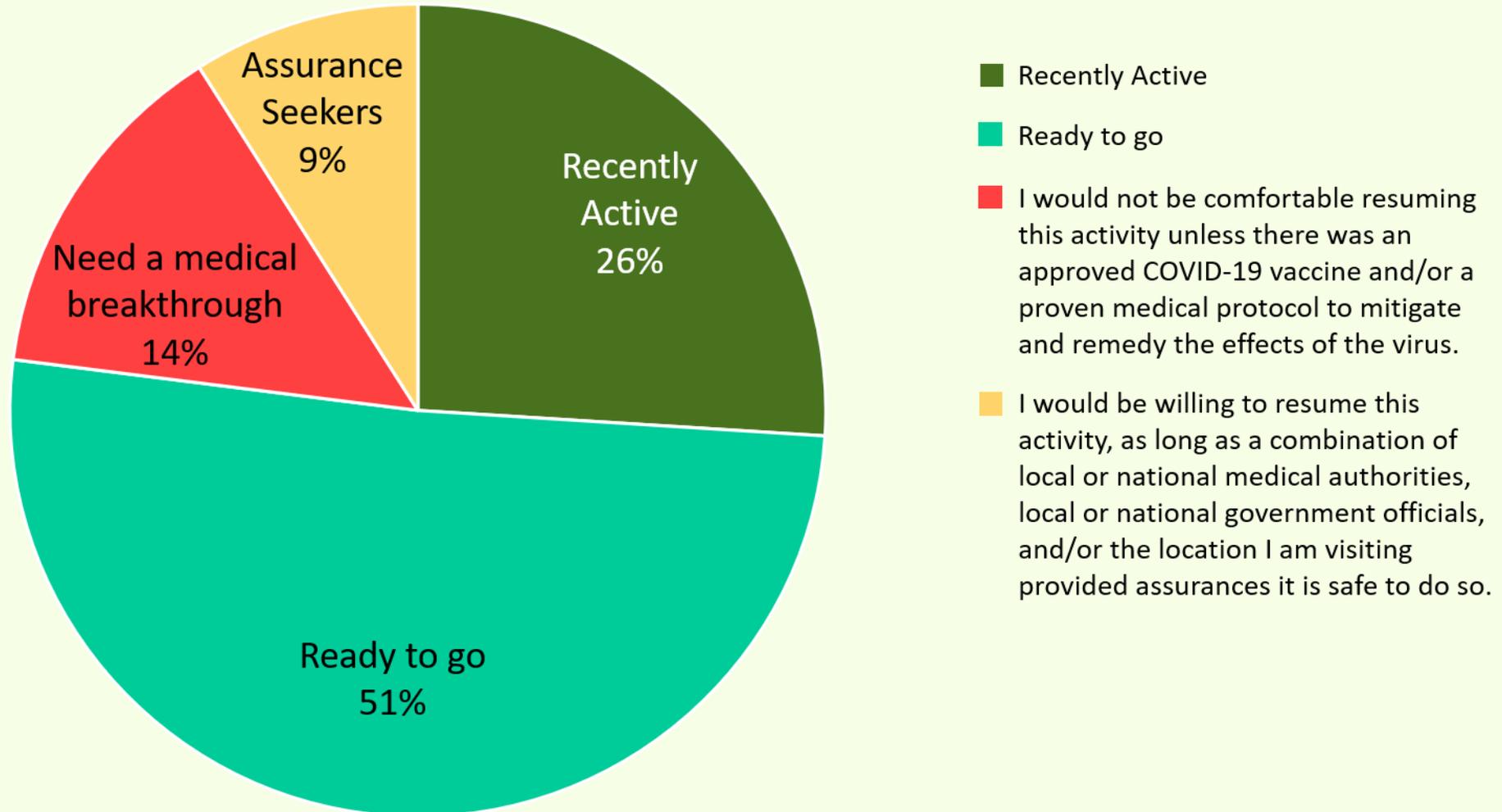
- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**

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

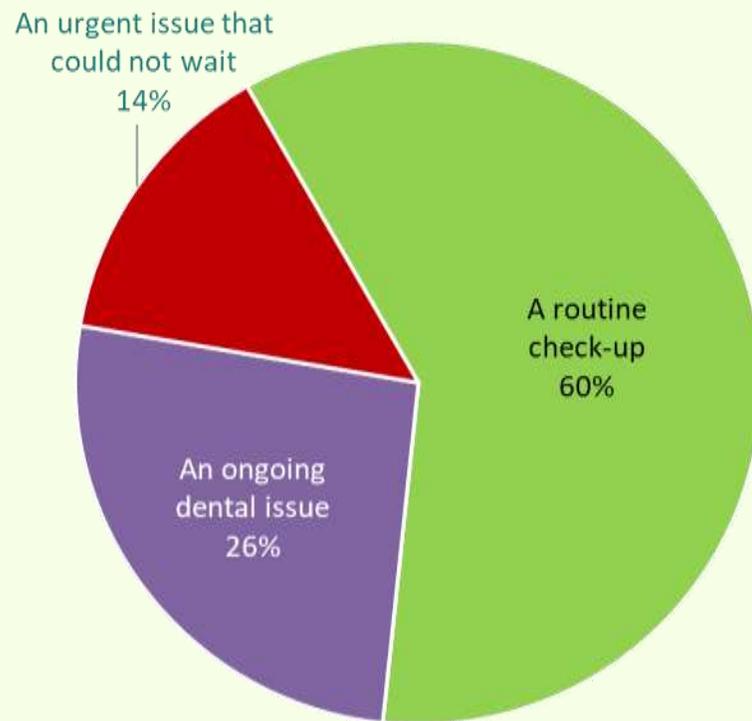
Which of the following conditions is closest to your current point of view... Visit a dentist's office



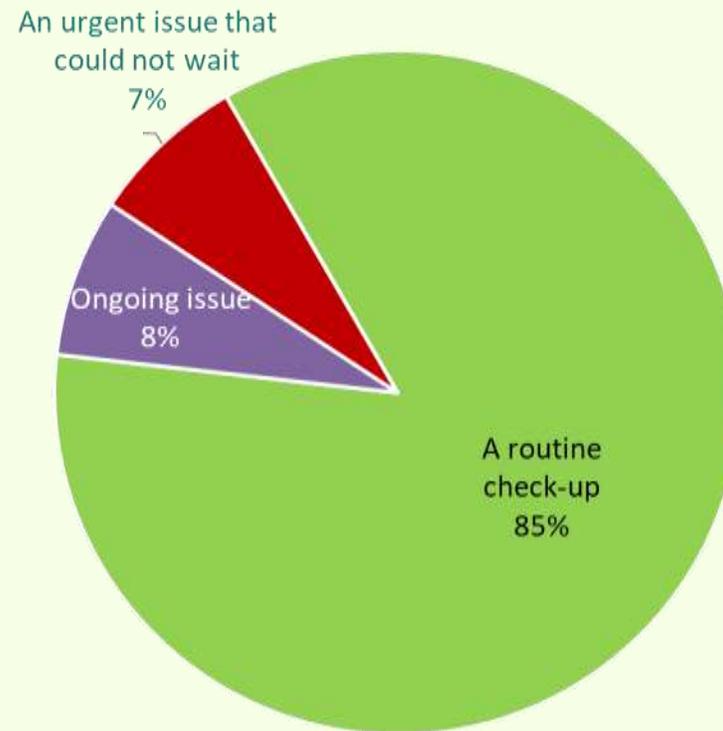
2/5 OF RECENT DENTIST VISITS WERE *NOT* ROUTINE

When you last visited the dentist, was it for...

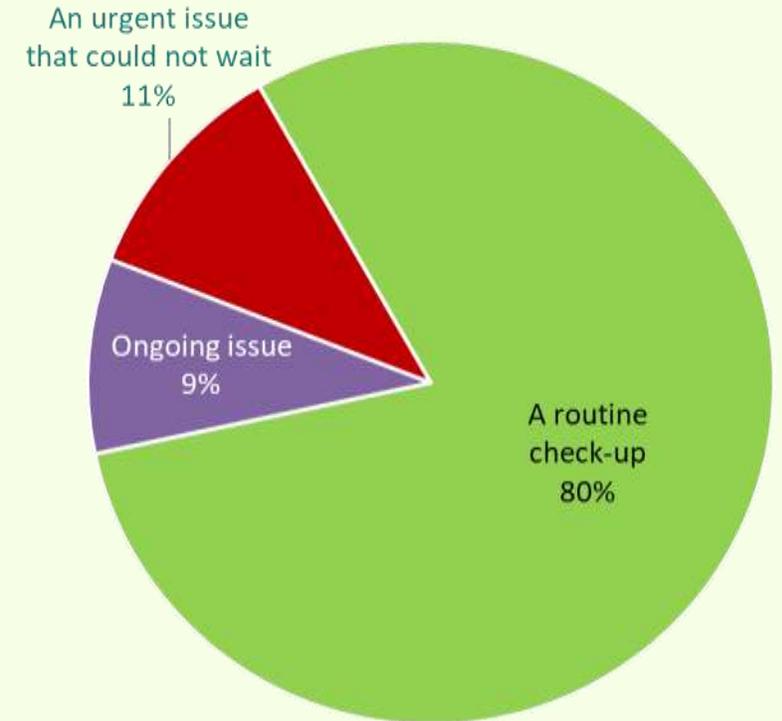
Within the past month



One to six months ago



Six to 12 months ago



Key Take-Aways from August 24th Data

- As of the week of August 24th, 99% of dental offices in the U.S. were open and patient volume was estimated at 74% of pre-COVID-19 levels. Staffing was at 94% of pre-COVID-19 levels. These values were roughly unchanged since our last wave of data collection and suggest we are reaching a “steady state” of economic activity in dental offices.
- The pandemic has taken a toll on dentists’ wellness. More than half of the panel reported personal challenges with anxiety, financial problems, sleep quality, weight change, and/or depression during the COVID-19 pandemic. More than a quarter reported increased use of alcohol or other substances. Younger dentists are more affected than older dentists.
- Dentists indicate that the most challenging practice-related issues during the pandemic have been planning for the future and financial sustainability, experienced similarly by owner and nonowner dentists.
- Four out of five dentists have experienced physical reactions due to using enhanced PPE. General discomfort, heat stress, exhaustion, and headaches were the most commonly reported.
- Consumer polling indicates that about three out of four people who visited the dentist last year are comfortable visiting the dentist right now. Another 9% would be willing to go if they had some assurances that it is safe and the remaining 14% are waiting for 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 for now.

Thank You!



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