

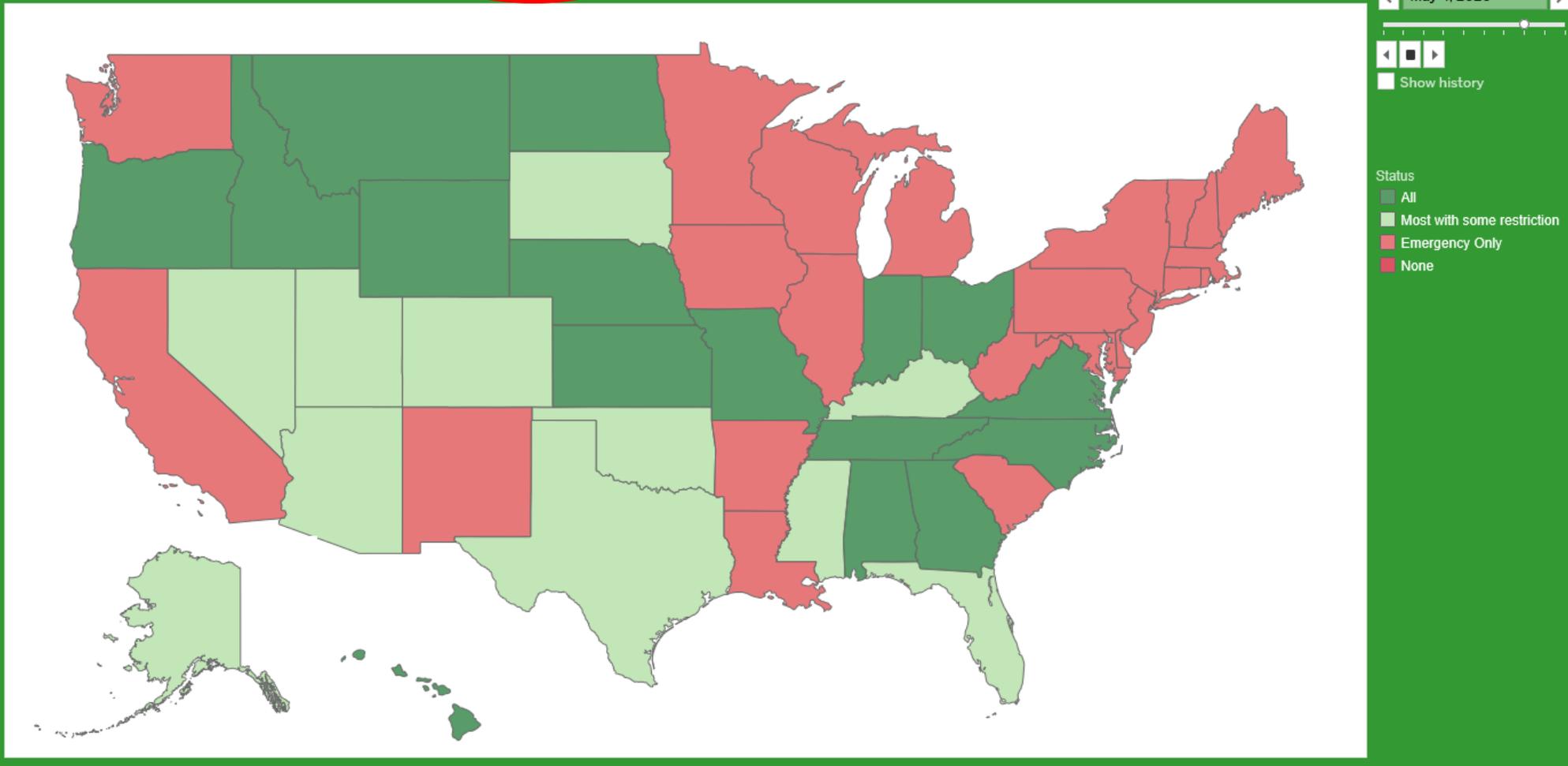
Economic Impact of COVID-19 on the Dental Care Sector:

A Look at Week 3 of “Reopening”

Based on Latest Data from HPI’s Economic Impact Poll

Path to Reopening

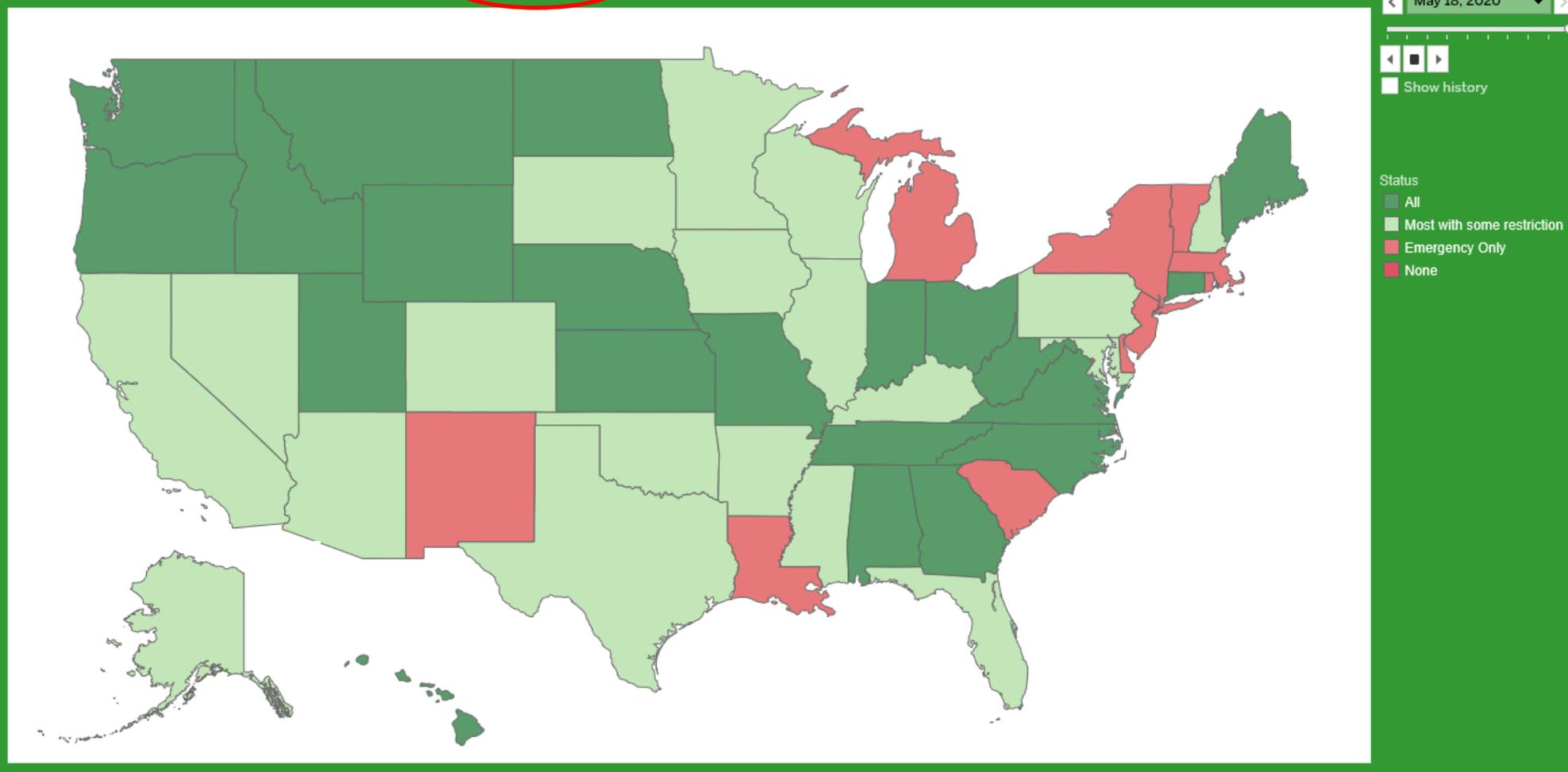
Classification of Permitted Dental Services **May 4, 2020**



As of May 4th, 27 states had re-opened for elective dental care.

Path to Reopening

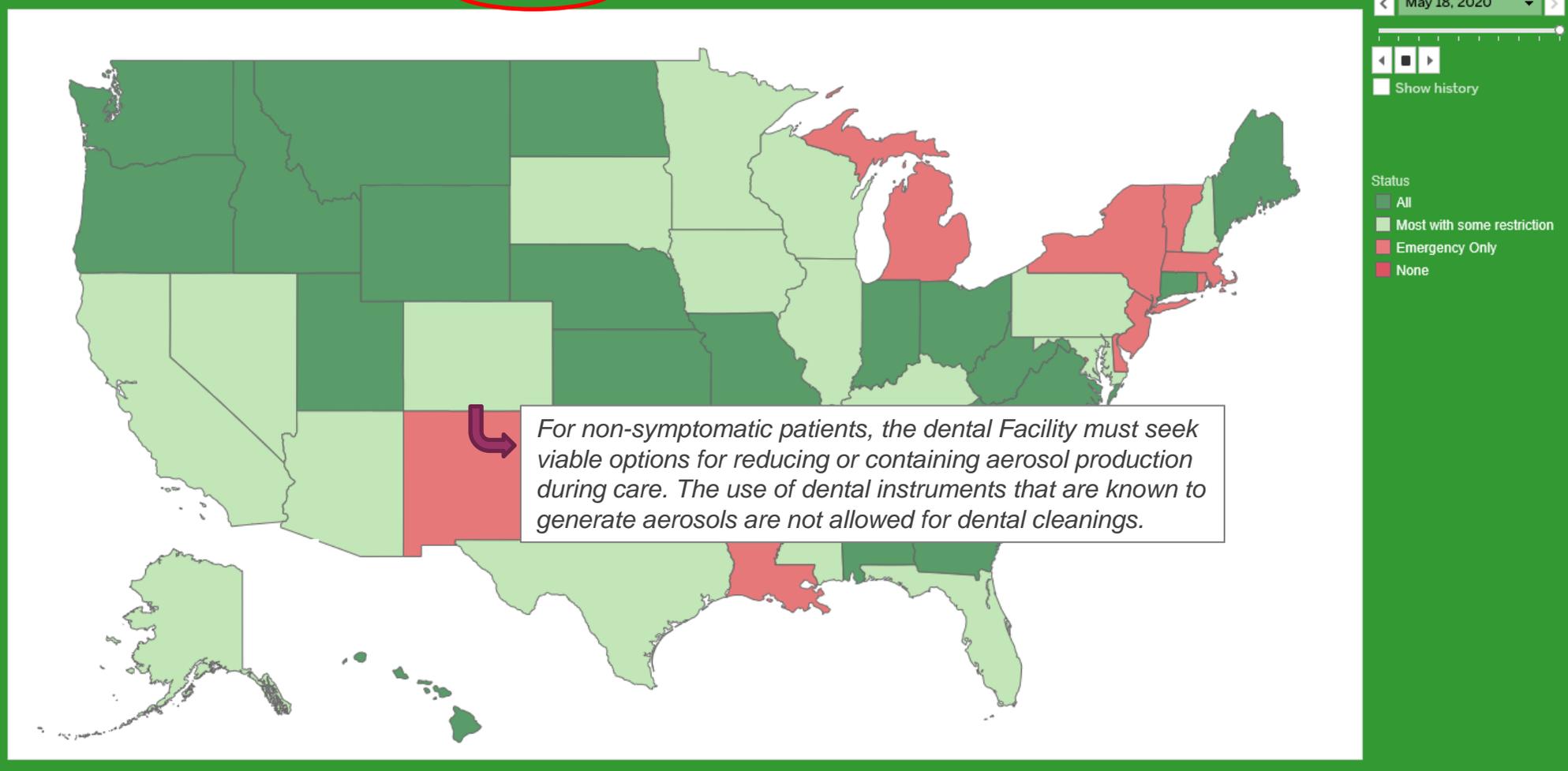
Classification of Permitted Dental Services - May 18, 2020



As of May 18th, 40 states had re-opened for elective dental care.

Path to Reopening

Classification of Permitted Dental Services - May 18, 2020



As of May 18th, 40 states had re-opened for elective dental care.

HPI Economic Impact of COVID-19 Tracking Poll

- Bi-weekly poll
- Started week of March 23rd
- Three core measures:
 - Status of your practice
 - Volume of patients and collections
 - Status of your staff
- “Question(s) of the Week”
- Response rate around 50%
- Representative sample of dentists in private practice
- Forthcoming webinar analyzing data from dentists in public health settings

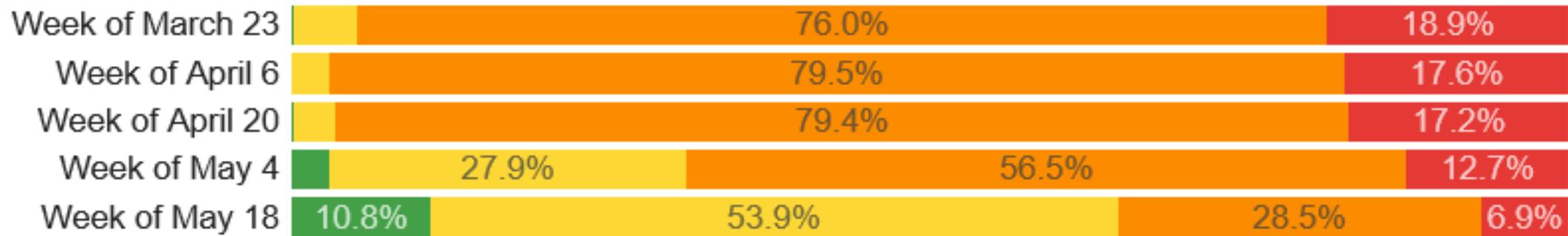
Number of responses

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

Core Questions

What is the current status of your dental practice?

Insight: The week of May 18th 65% of dental practices in the U.S. were open, more than twice as many as two weeks prior.

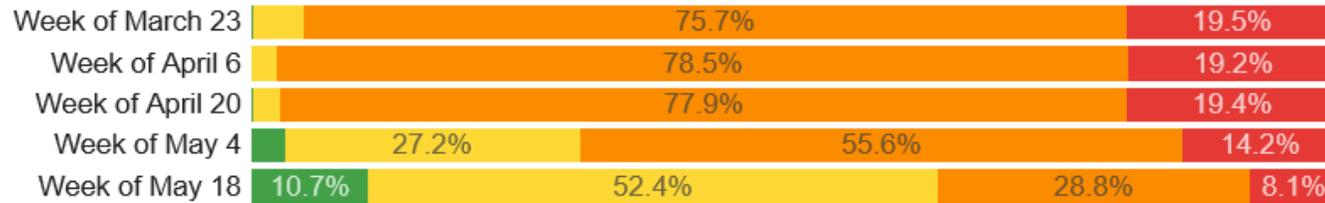


- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

Core Questions

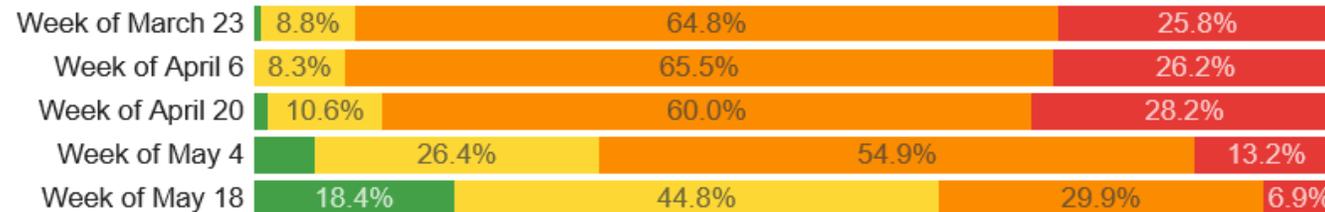
What is the current status of your dental practice?

SOLO DENTISTS



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

LARGE GROUP (10+ DENTISTS)

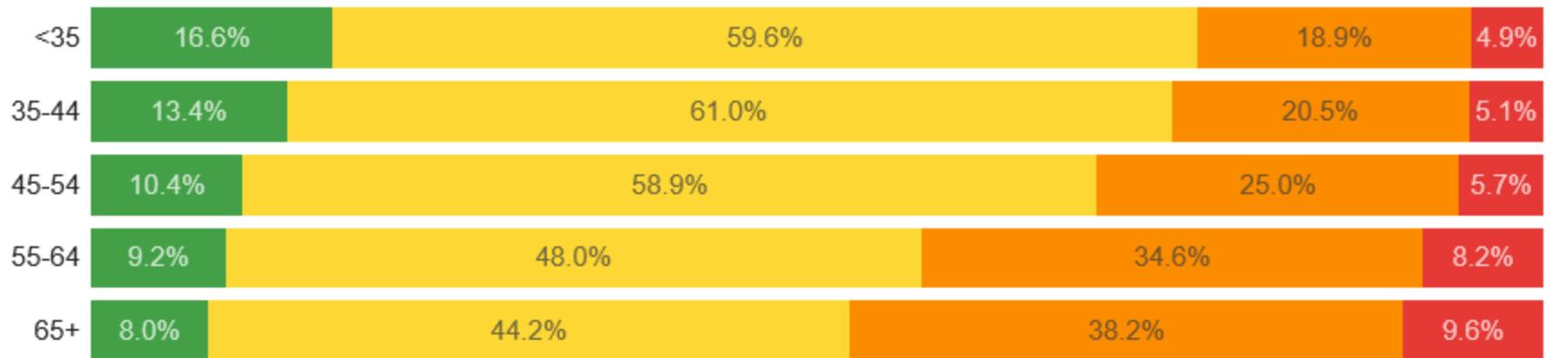


- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

Insight: Larger dental practices are getting back to normal slightly quicker.

Core Questions

What is the current status of your dental practice?

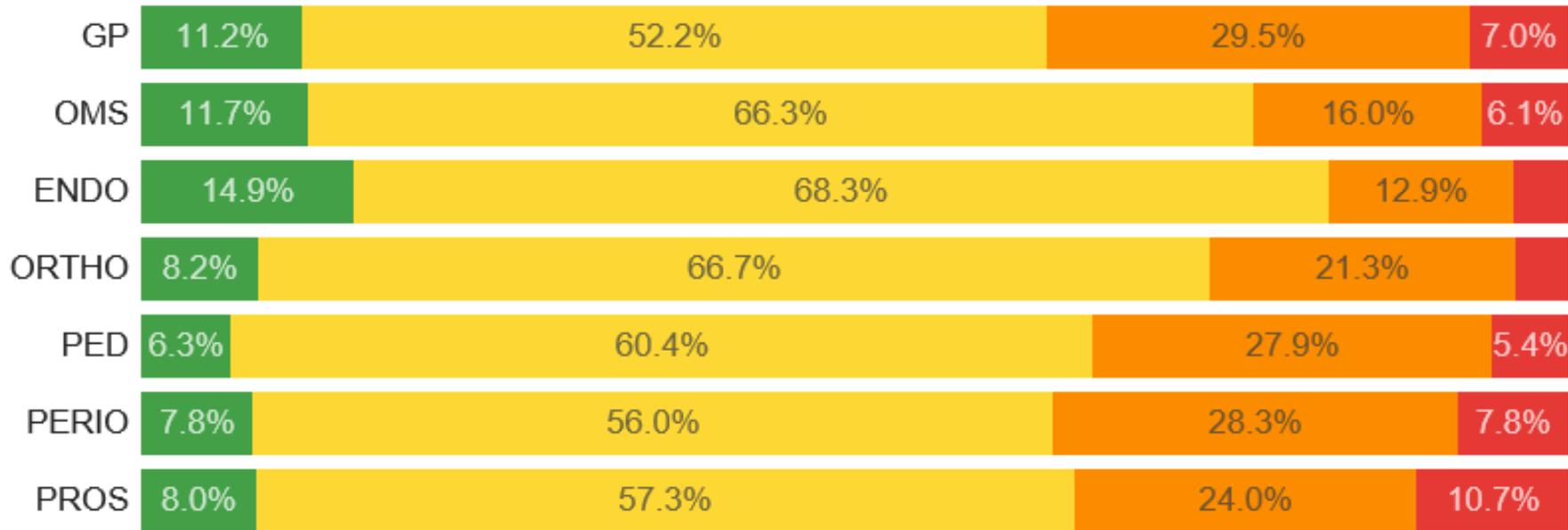


- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

Insight: Older dentists continue to be less likely to re-open. Earlier data showed older dentists had highest concerns over transmission.

Core Questions

What is the current status of your dental practice?

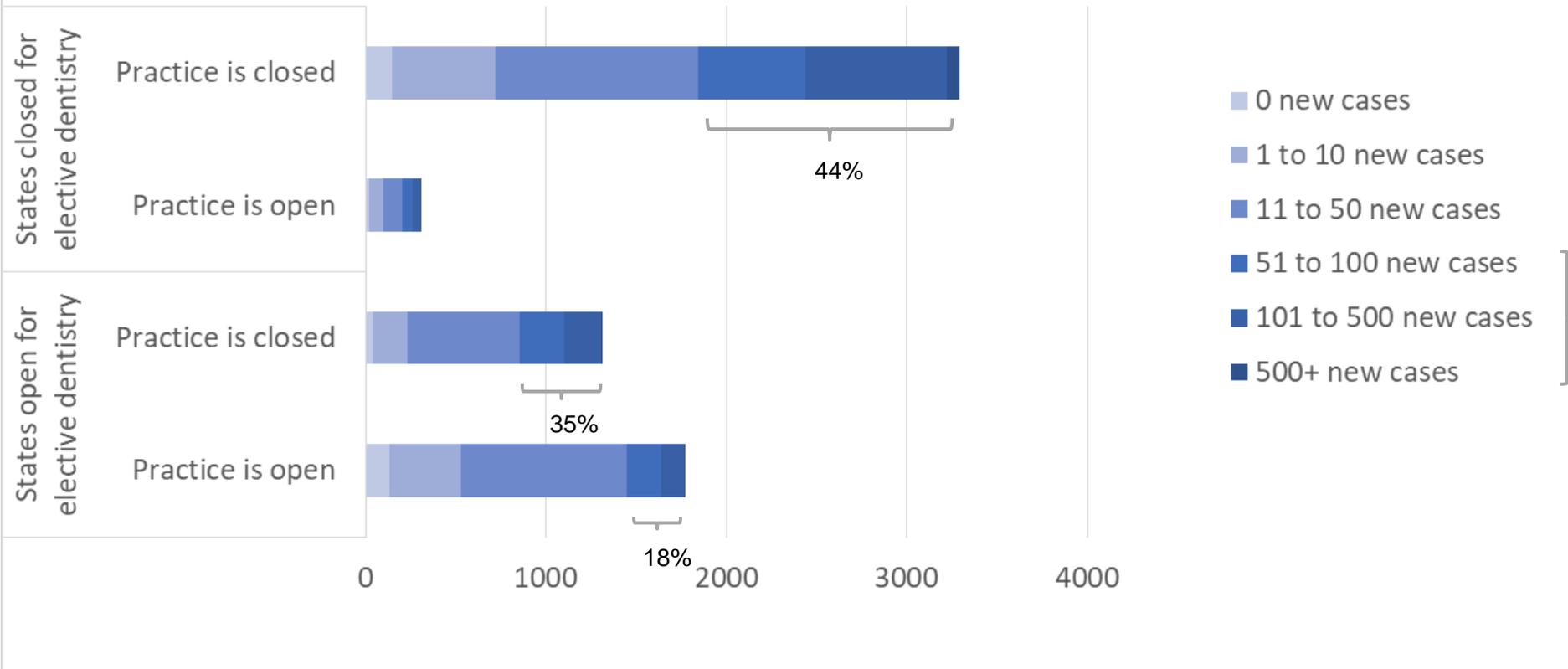


Insight: There is variation across specialties in the pace of re-opening.

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

A Closer Look at “Early Openers”

Distribution of Dental Offices According to Open/Closed Status and Number of New COVID-19 Cases per Week per 100,000 Population in that County



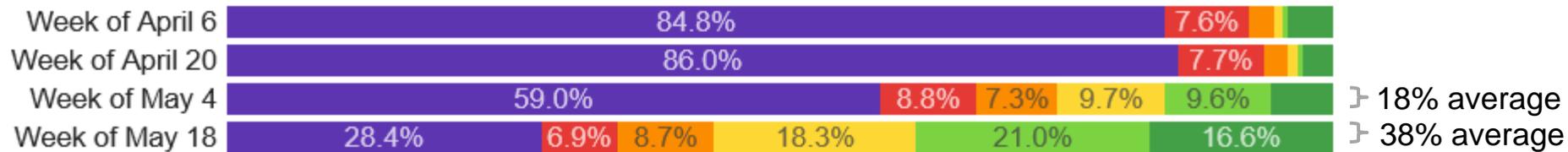
Insight: Practices that re-opened week of May 4th were more likely to be located in counties with lower COVID-19 infection rates.

Areas with high number of new COVID-19 cases

Core Questions

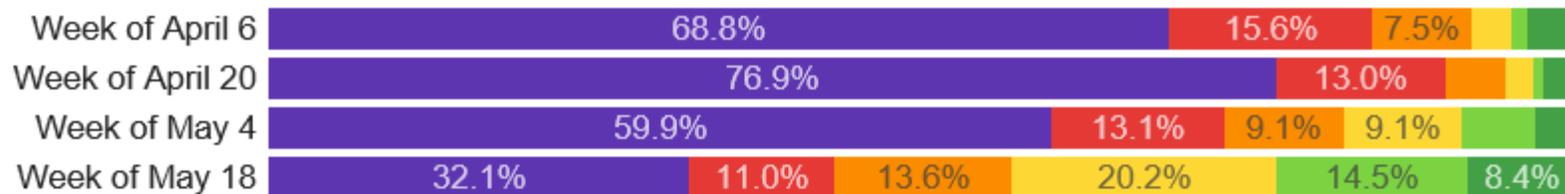
How does this week compare to what is typical in your practice, in terms of... *

Total Patient Volume



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

Volume of Total Collections



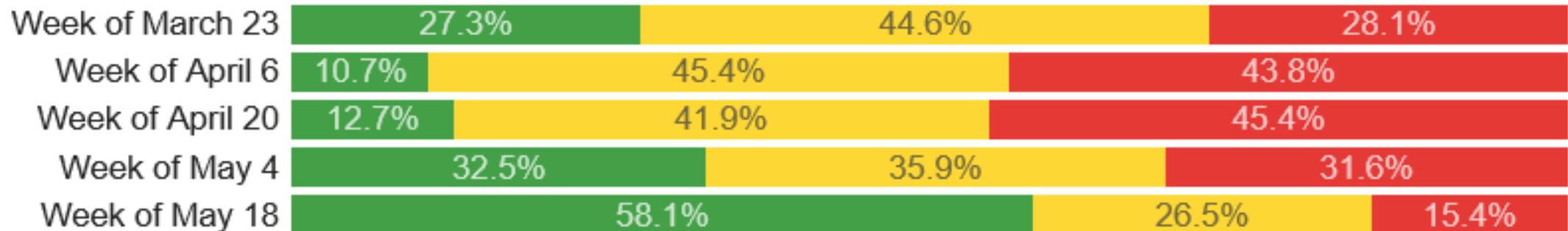
● Less than 5%
● 5-10%
● 11-24%
● 25-50%
● 51-75%
● 76% or more

Insight: Nationally, patient volume was at 38% of pre-COVID-19 levels the week of May 18th, week 3 of dentistry's re-opening.

Core Questions

Is your dental practice paying staff this week?

Insight: Nationally, dental practices continue to hire back staff at a steady pace.



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

Question of the Week

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

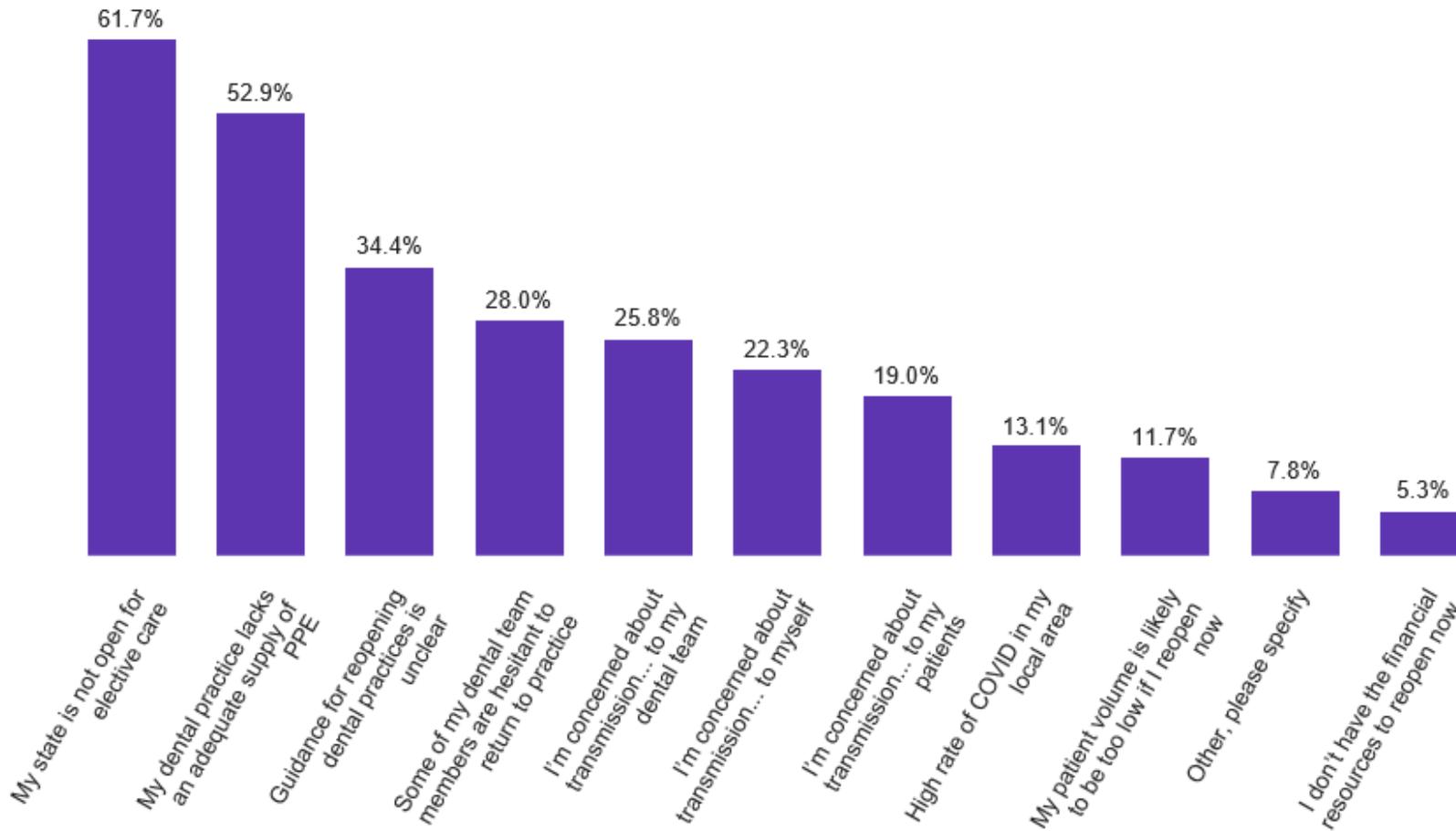


● Yes ● I've applied, but have not received any benefits yet ● No, my application was not approved
● No, I have not applied

Insight: Layoffs hit employee dentists hard. They are now being hired back, but not as rapidly as other staff.

Question of the Week

[If owner dentist and practice is closed or closed except for emergencies] What is keeping you from reopening your dental practice for elective care?



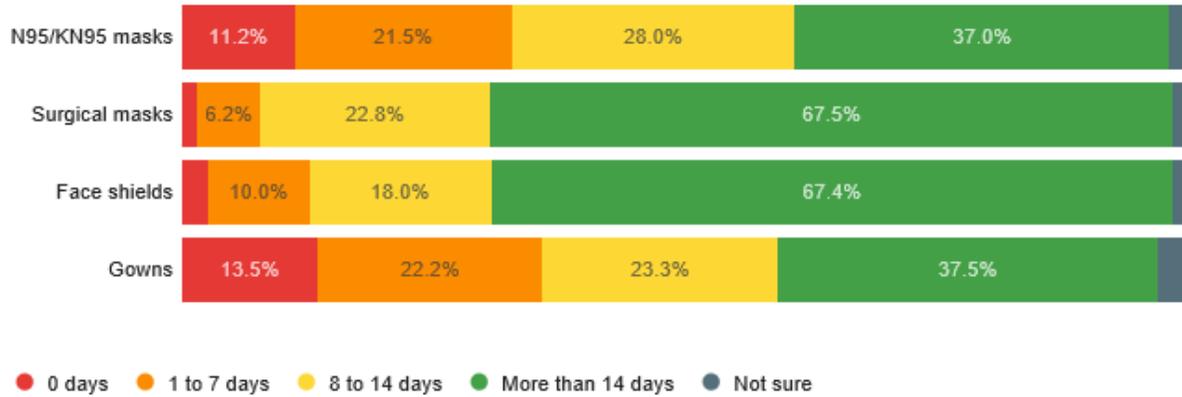
Insight: PPE shortages are the biggest barrier to reopening dental practices in states permitting elective care.

Dentists also cite confusion over guidelines for reopening, hesitancy of dental team members to return to work, and concerns over transmission of COVID-19 as important reasons.

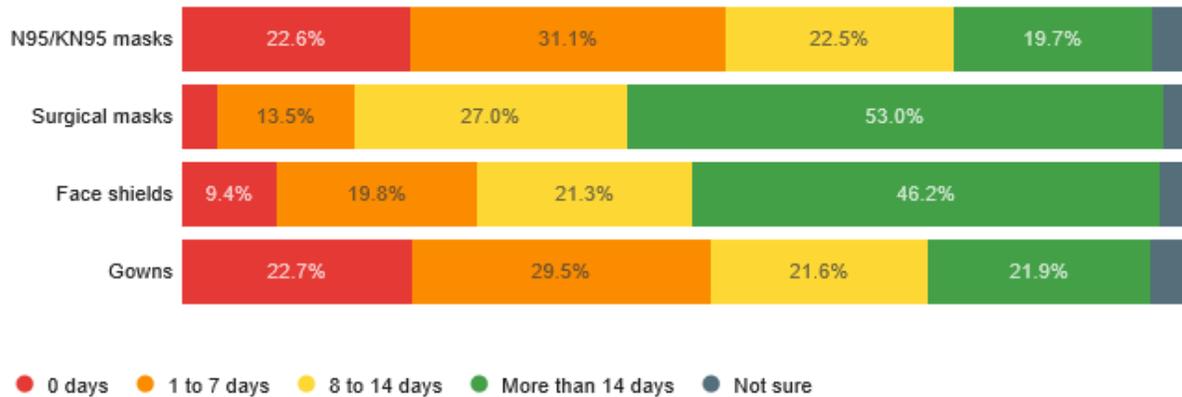
PPE Availability

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

Practice Open



Practice Closed

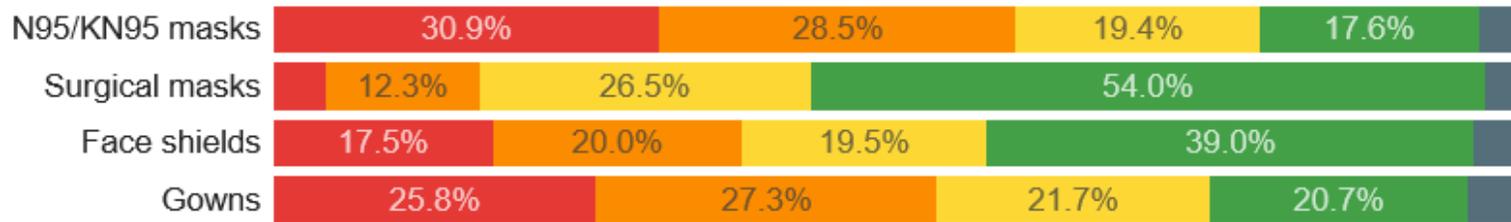


Insight: Practices that are open have higher PPE stockpiles compared to practices that are closed. This confirms PPE availability is an important factor in the decision to re-open.

PPE Availability

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

Insight: Nationally, PPE availability in dental practices improved the past two weeks.



Week of May 4

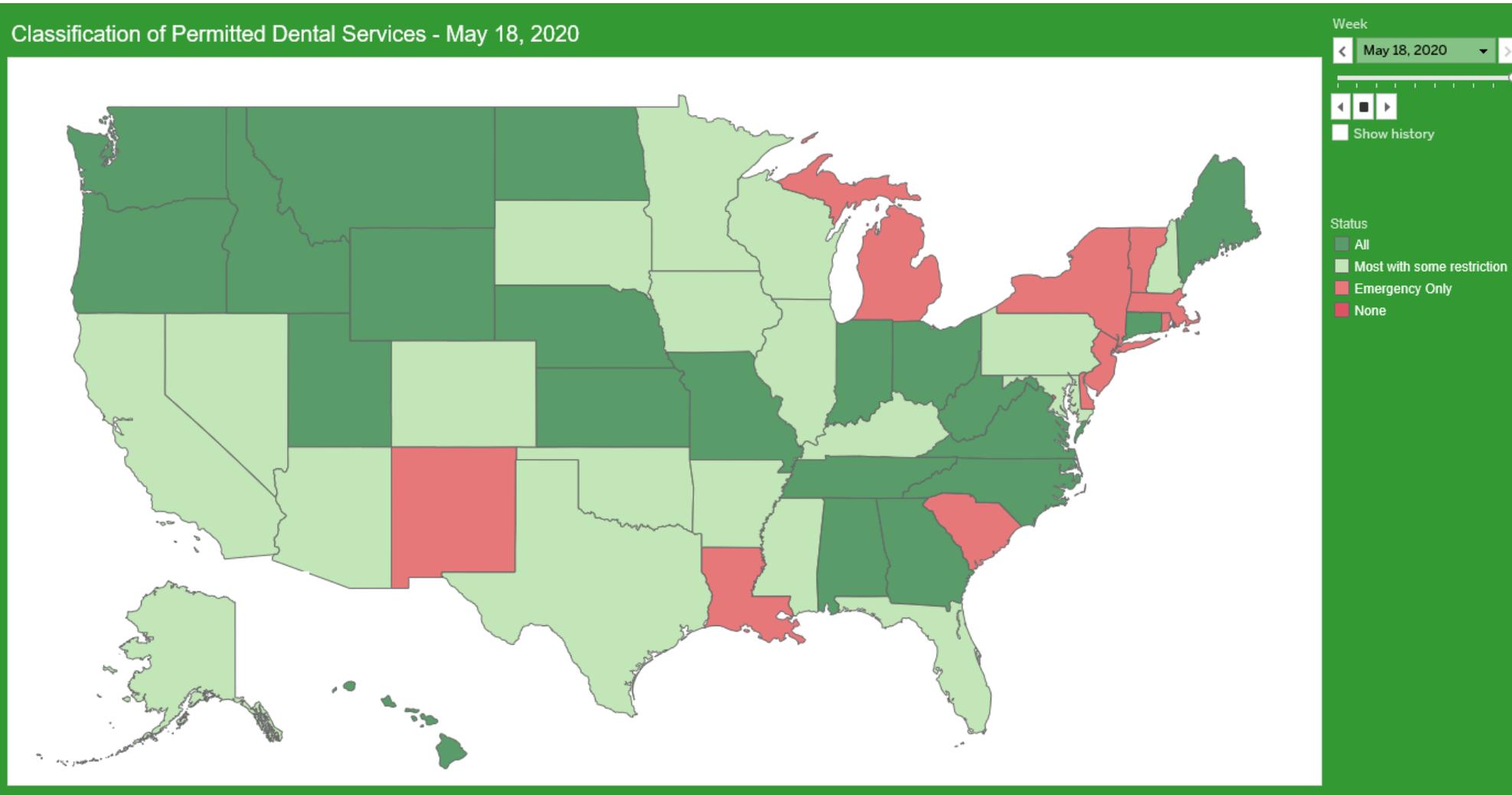
● 0 days ● 1 to 7 days ● 8 to 14 days ● More than 14 days ● Not sure



Week of May 18

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

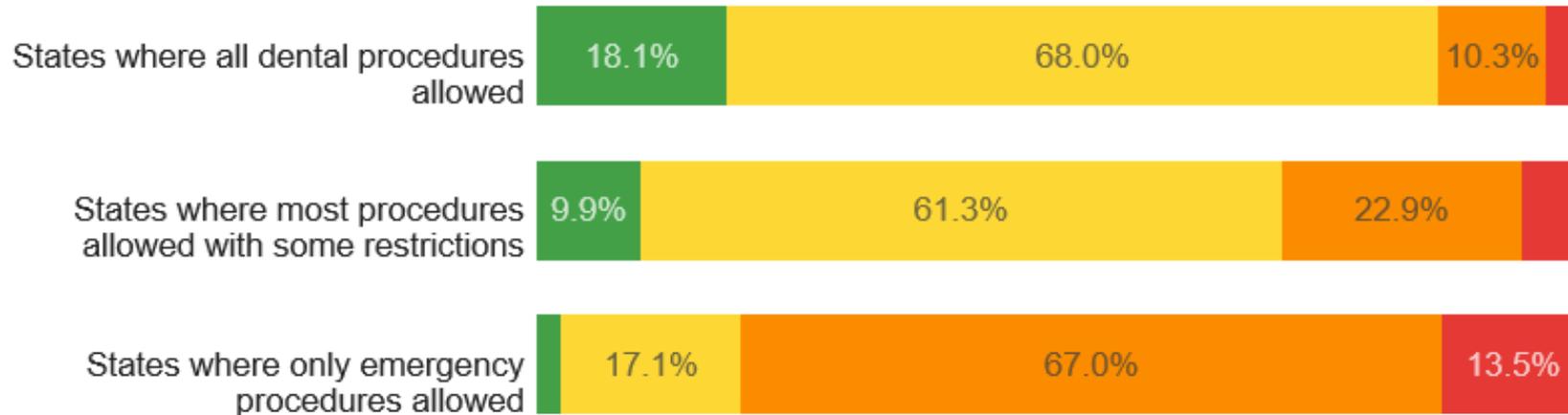
A Closer Look at Open States



*As of May 18th,
40 states had
re-opened for
elective dental
care.*

Core Questions

What is the current status of your dental practice?



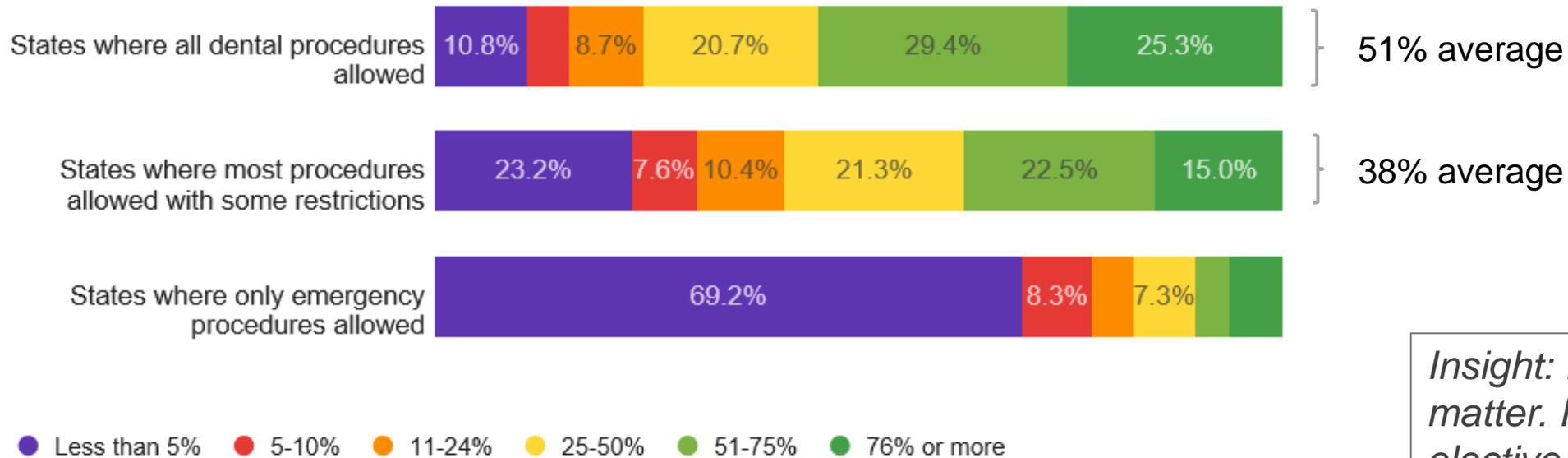
Insight: In states that have re-opened, about three quarters of practices were open the week of May 18th.

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

Core Questions

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

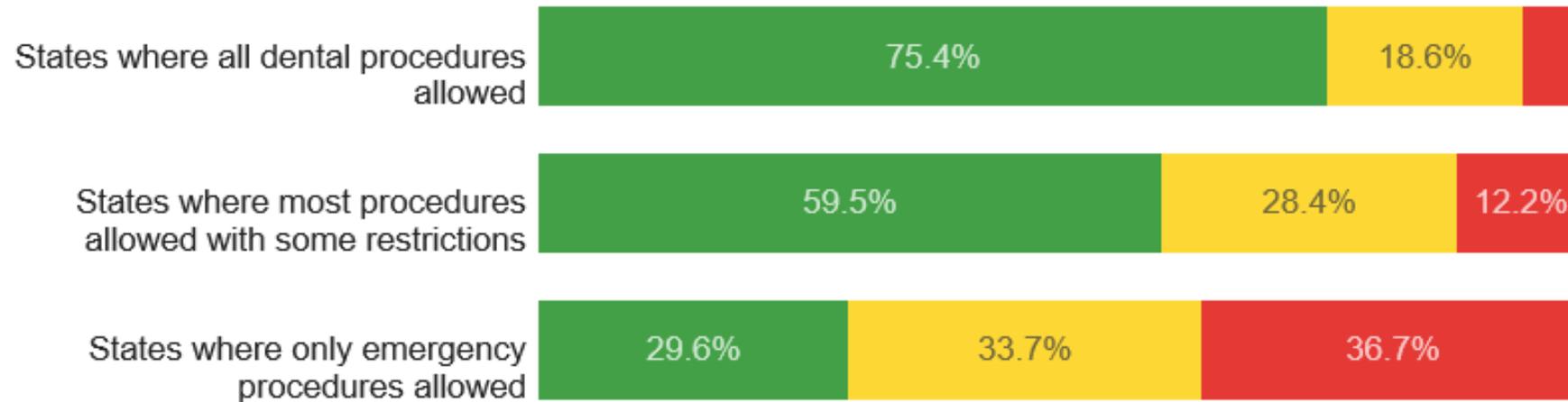
Total Patient Volume



Insight: Procedure restrictions matter. In states allowing all elective procedures, patient volume is higher.

Core Questions

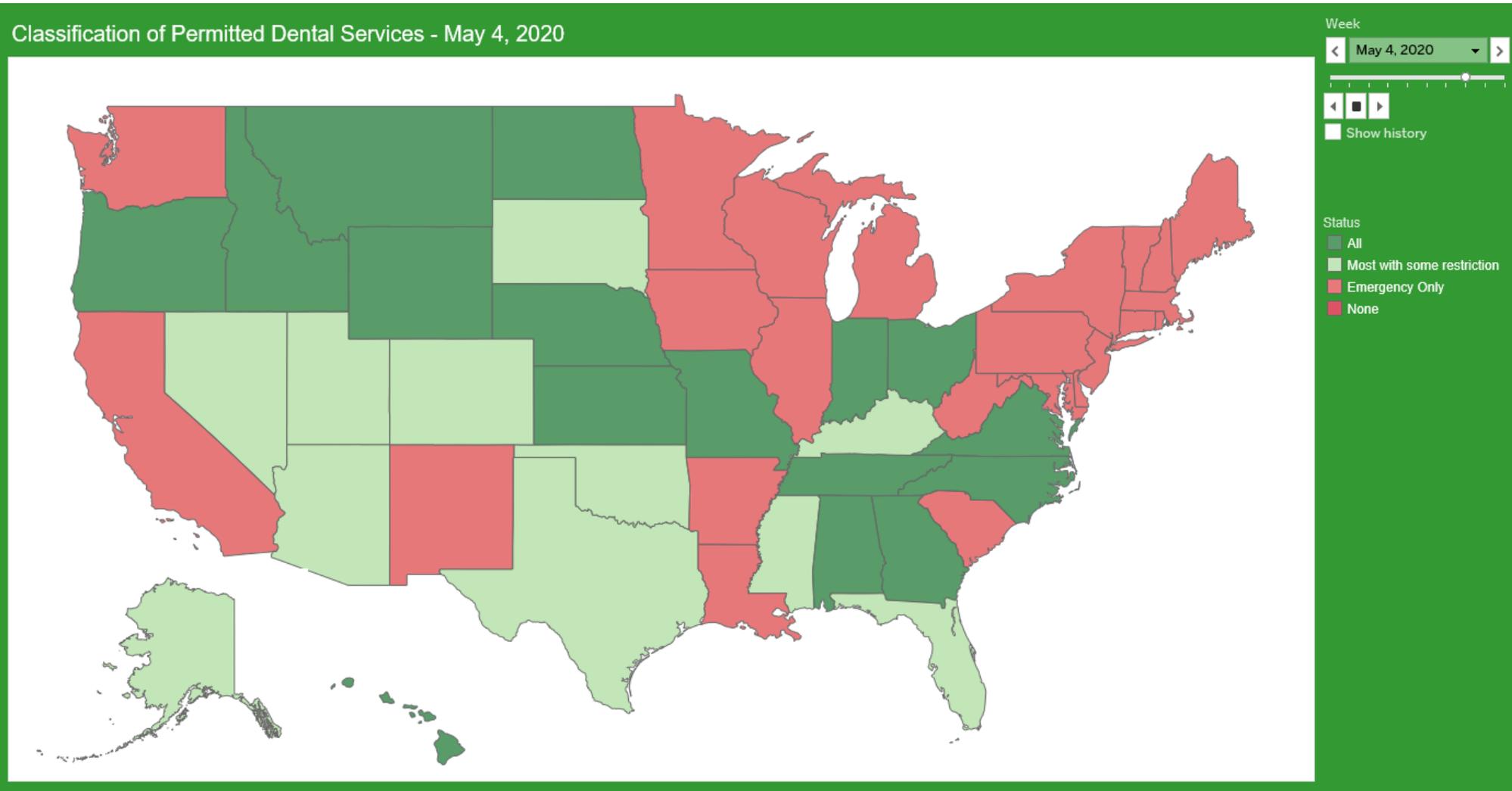
Is your dental practice paying staff this week?



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

Insight: Procedure restrictions matter. Re-hiring has been most robust in states where all procedures are allowed.

A Closer Look at States That Have Been Open for 3 Weeks

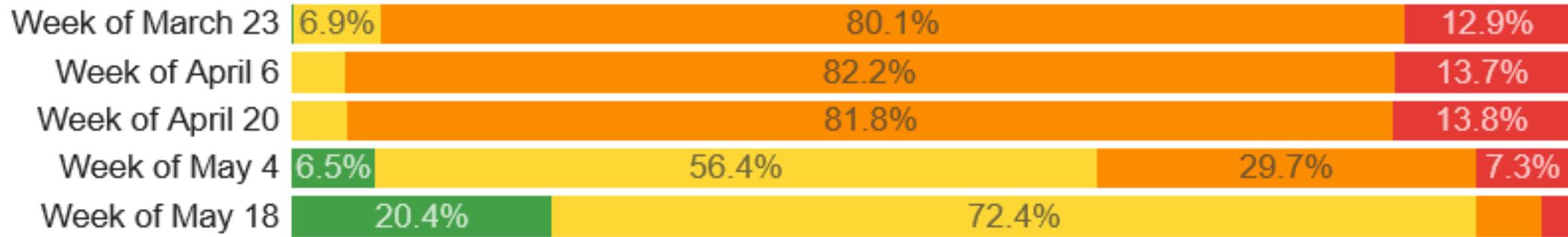


As of May 4th, 27 states had re-opened for elective dental care. These states are in week 3 of re-opening.

Core Questions

What is the current status of your dental practice?

Insight: In states that have been open for elective care since May 4th, one in five practices are already fully back to normal.



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

Core Questions

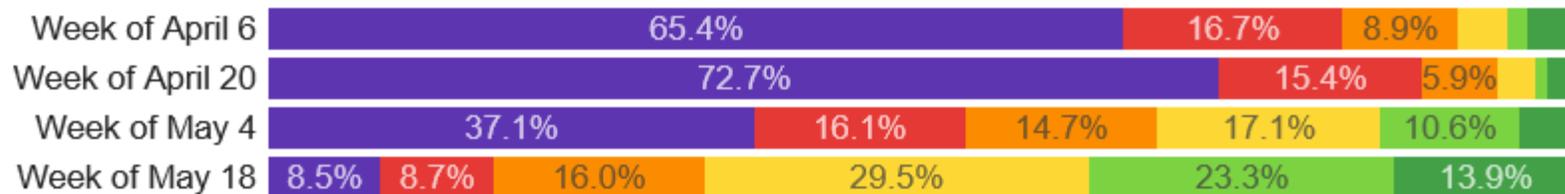
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Volume of Total Collections



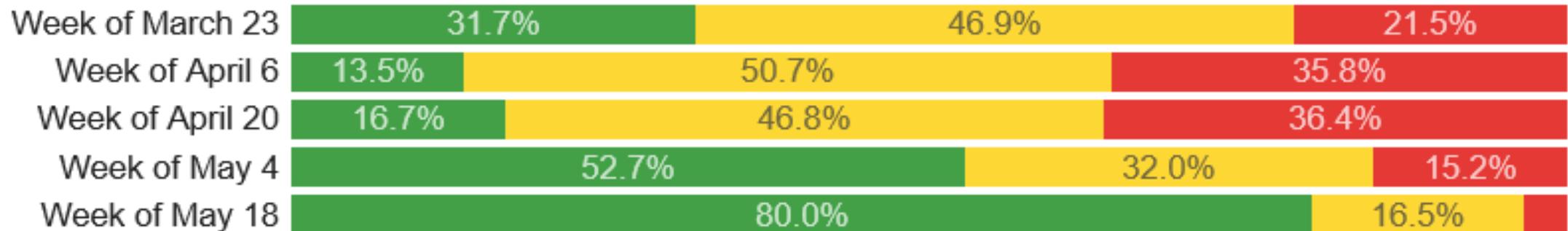
● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

Insight: In states that have been open for elective care since May 4th, patient volume is rebounding steadily. By the week of May 18th patient volume had rebounded to over half of pre-COVID 19 levels.

Core Questions

Is your dental practice paying staff this week?

Insight: States that have been open for elective care since May 4th are seeing major re-hiring of staff.

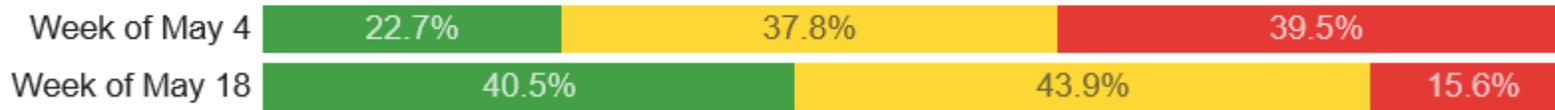


● Yes, fully ● Yes, partially ● Not paying any staff

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



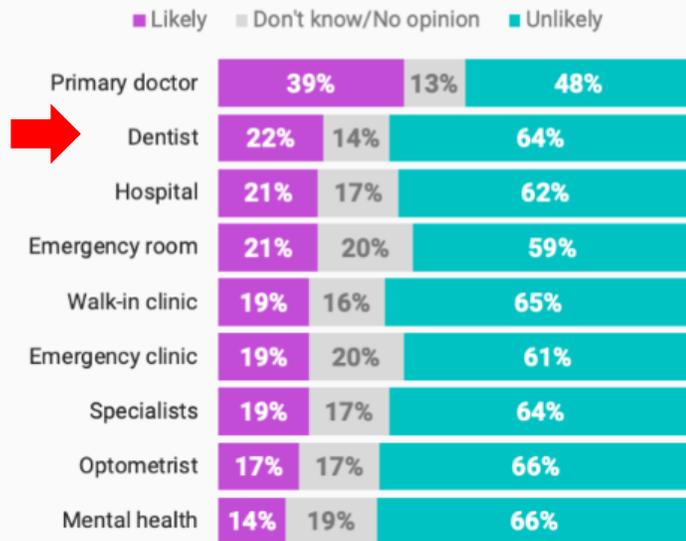
● Yes ● I've applied, but have not received any benefits yet ● No, my application was not approved
● No, I have not applied

Insight: Employee dentists are not being hired back as fast as other staff.

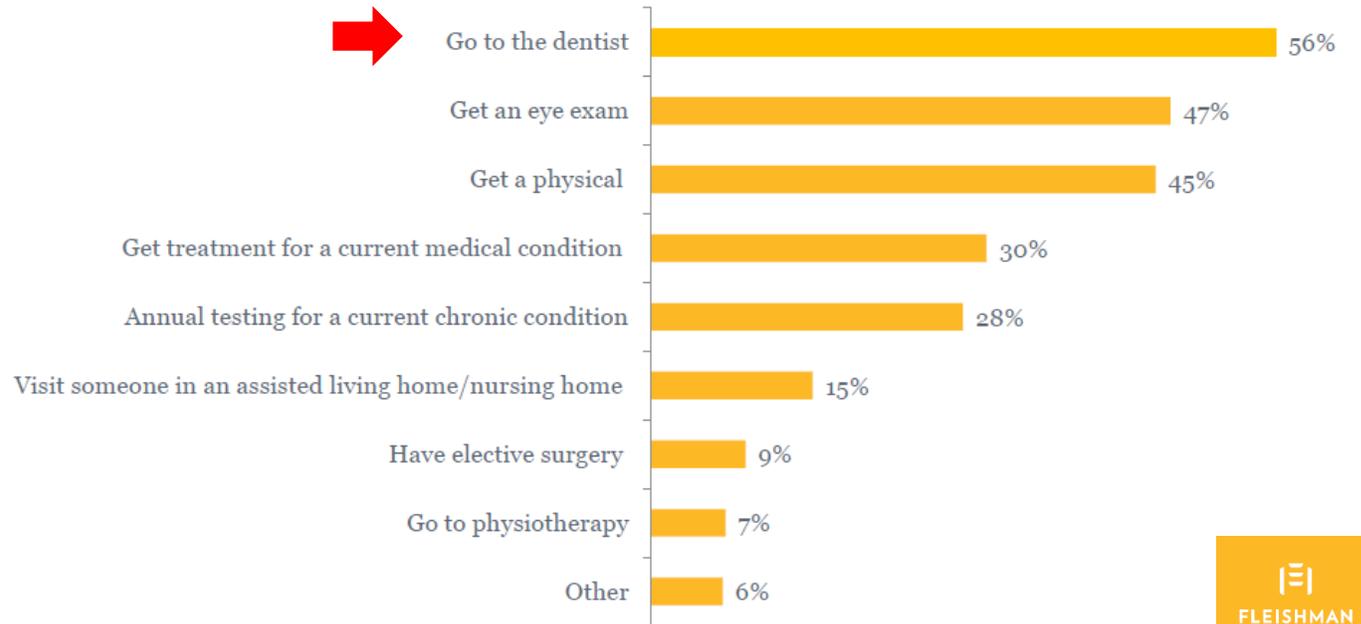
Insights from Consumer Polling

Lion's Share of Adults Unlikely To Seek Non-COVID-19 Treatments Amid Pandemic

Adults were asked, in light of the pandemic, how likely they were to visit the following for appointments or treatments unrelated to the coronavirus:



Q: Which of the following are you planning to do in the next 12 months?



TRUE Global Intelligence, the in-house research practice of FleishmanHillard, fielded an online survey of U.S. adults aged 30-75 on May 4 - 5, 2020.

Key Take-Aways from Week 3 of Re-opening

- As of the week of May 18th, patient volume had rebounded to 38% of pre-COVID-19 levels nationwide. In the 27 states that have been open for elective care for at least three weeks, it has rebounded to 54% of pre-COVID-19 levels. Dental practices are hiring back staff at a rapid pace. The dental care sector is recovering.
- Lack of PPE is an important factor limiting more dental practices from re-opening. That said, the stockpile of PPE in dental offices rose significantly in the past two weeks.
- Confusion over guidelines for re-opening was also an important factor keeping more dentists from re-opening their office as was hesitancy among staff members to return to work and concerns over transmission of COVID-19. On the latter, dentists 65 and older expressed the highest level of concern.
- Consumer attitudes, for now, are encouraging when it comes to visiting the dentist. The data indicate the public is prioritizing visiting the dentist when it comes to health care services.
- Taken together, data for the week of May 18th suggest a promising recovery path for the dental economy so far. See you again in two weeks!

Thank You!



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