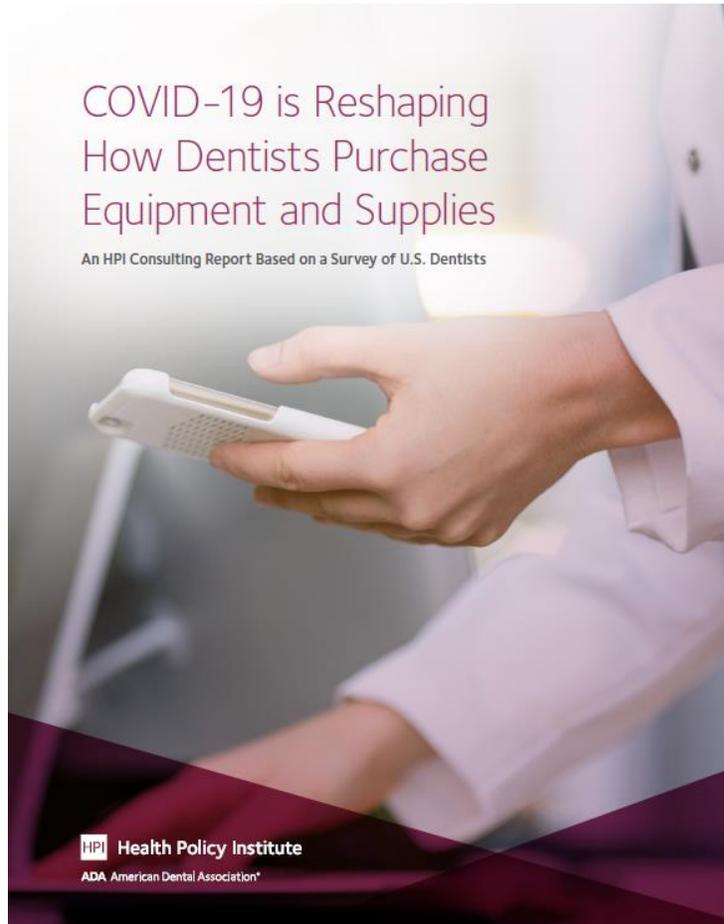


The Impact of COVID-19 on the Dental Care Sector

Insights from Data for the Week of November 16th

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

Today



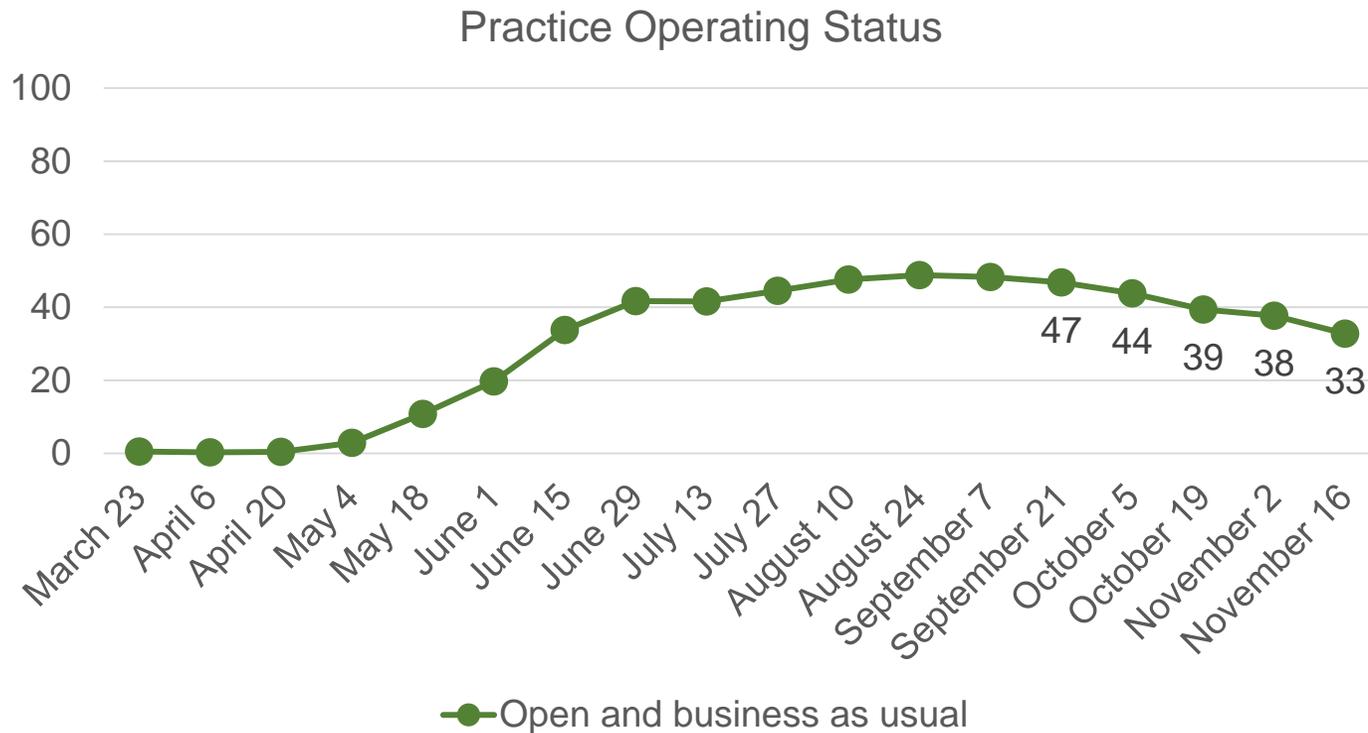
1. *Update on the latest data on dental sector recovery – week of November 16th.*
2. *'Question of the Week' data on dental practice patient capacity and an update on measures dentists are taking to maintain financial solvency.*
3. *The latest consumer sentiment data related to dental visits.*

HPI Impact of COVID-19 Tracking Poll

- Bi-weekly poll beginning March 23rd.
- Core measures: Status of your practice, volume of patients, 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.

Core Questions

What is the current status of your dental practice?

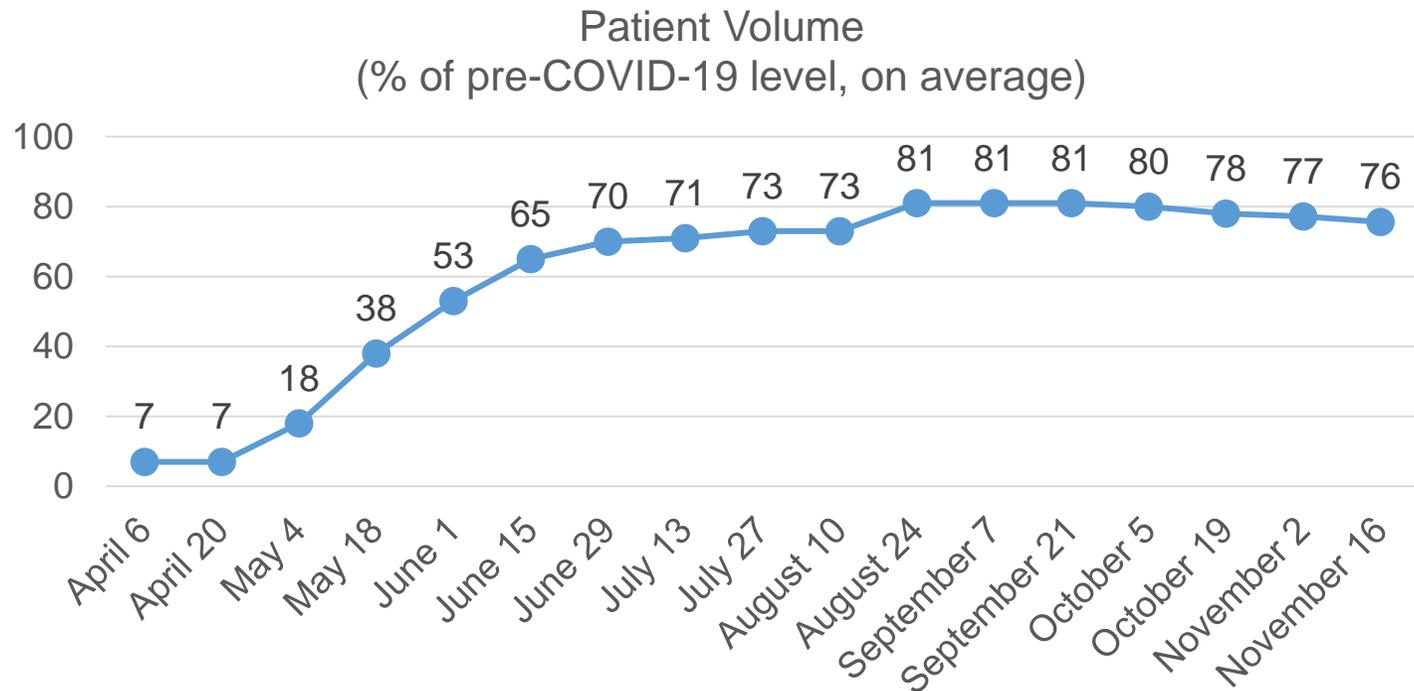


Insight: As of the week of November 16th, 98% of dental practices in the U.S. were open. About one-third of practices reported “business as usual” in terms of patient volume. This has declined steadily over the past couple months.

Core Questions

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

Total Patient Volume



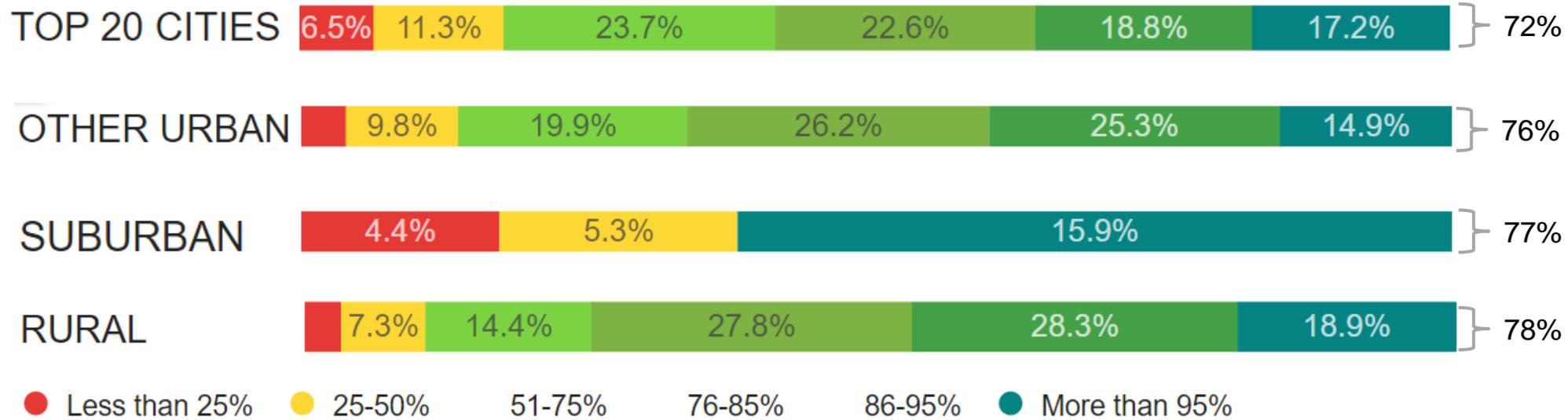
Insight: Patient volume in dental practices is at 76% of pre-COVID-19 levels as of the week of November 16th. This represents a slight decrease over the past couple months.

Core Questions

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

Total Patient Volume

BY GEOGRAPHY

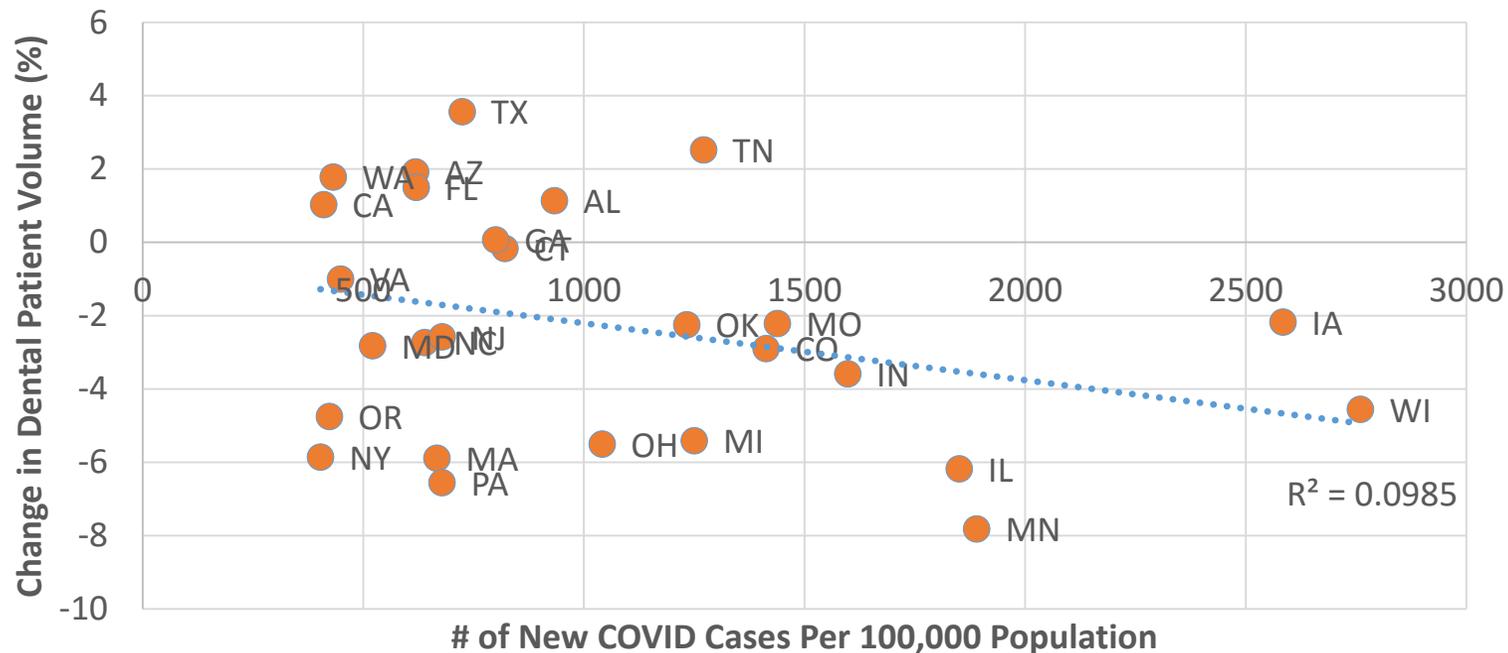


Insight: Patient volume is highest in practices located in rural areas and lowest in the Top 20 largest cities in the U.S.

COVID-19 Cases and Patient Volume

Is Dental Patient Volume Correlated with the Number of COVID-19 Cases among the Population?
(excluding states with <30 responses)

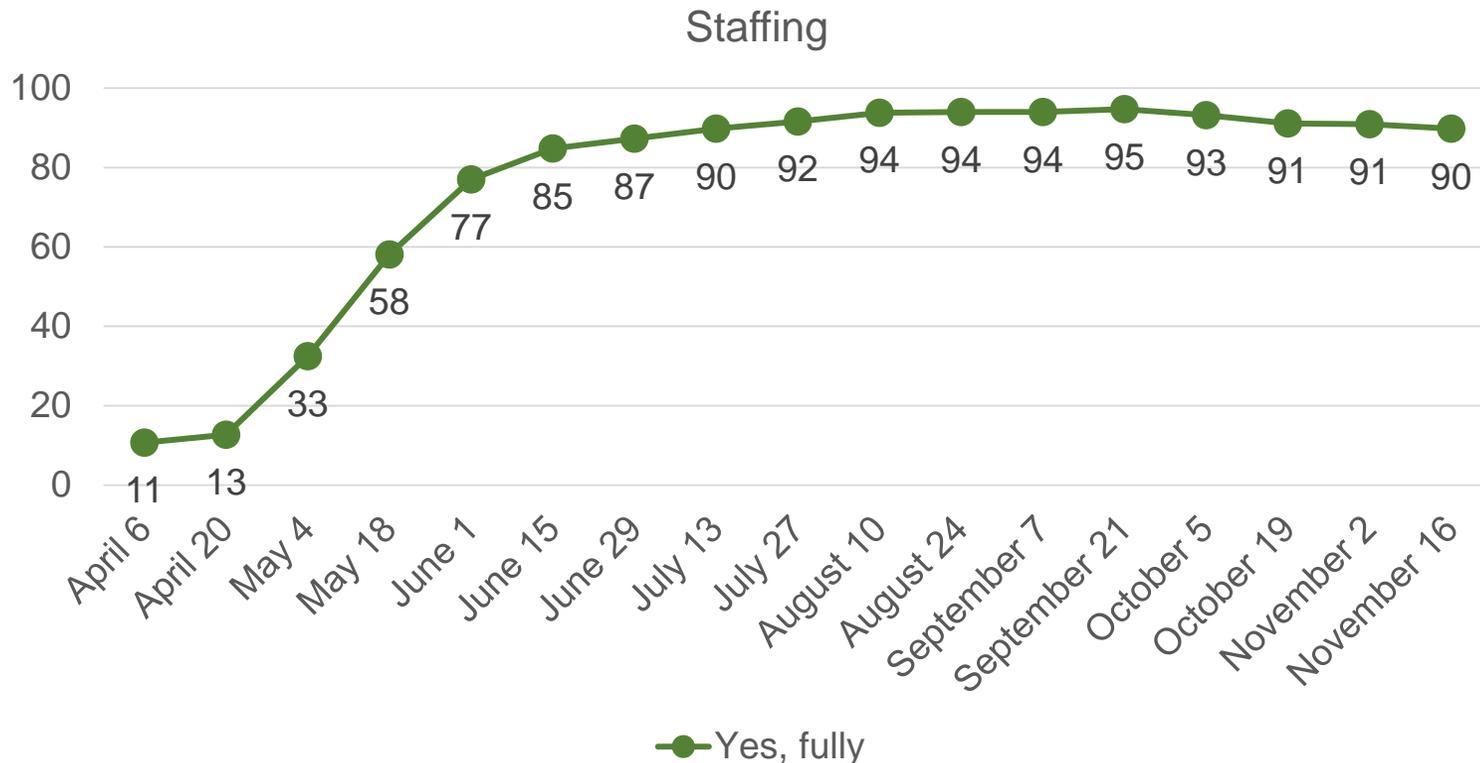
October 19 - November 16, 2020



Insight: There is a very weak relationship between COVID-19 cases and patient volume at the state level.

Core Questions

Is your dental practice paying staff this week?



Insight: Staffing in dental practices was at roughly 90% of pre-COVID-19 levels the week of November 16th. This has declined slightly since mid-September.

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

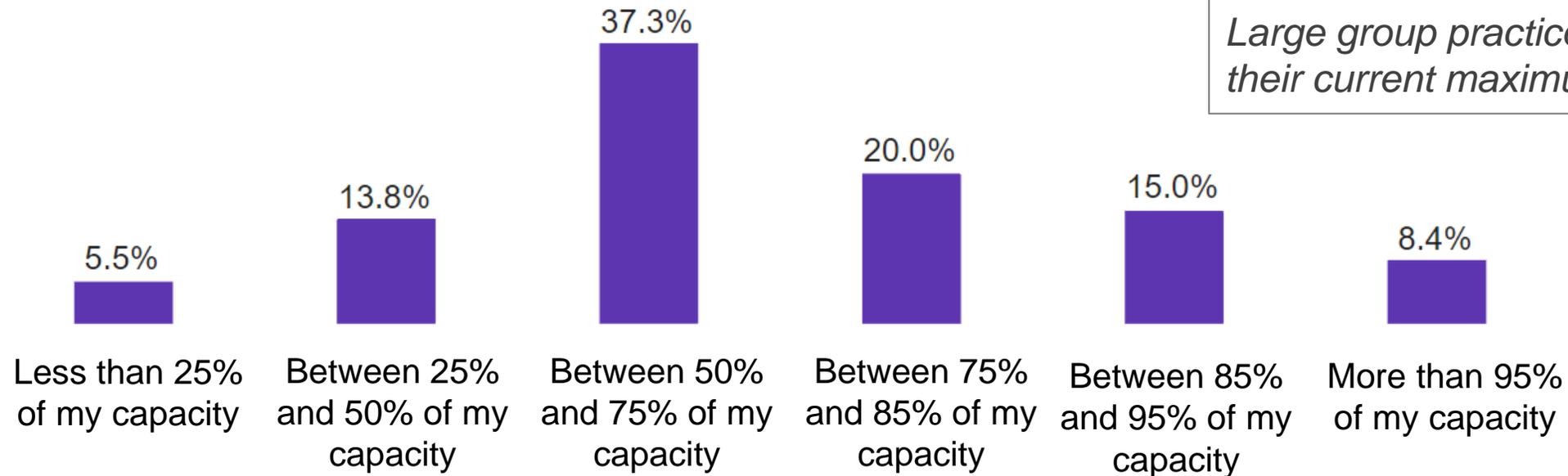
Insight: PPE availability in dental practices has been stable for several months. Gowns and N95s remain the biggest issue.

Questions of the Week

Patient Capacity

Number of patients actually seen in your practice last week /
Current maximum number of patients the practice could see

ALL RESPONDENTS



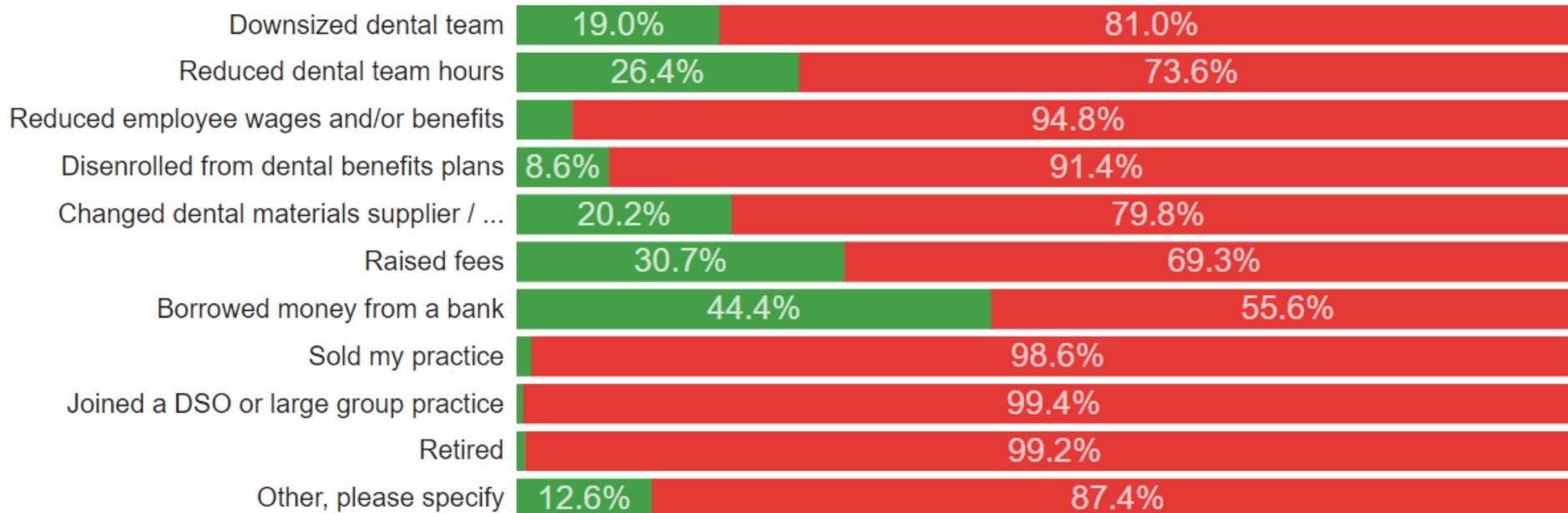
Insight: The majority of practices are operating below 75% of their current maximum capacity, with the greatest share seeing 50-75% of the patients they could accommodate. Less than 1 in 10 are operating at >95% of their current maximum capacity.

Large group practices are closer to their current maximum capacity.

Questions of the Week

Since you reopened, have you taken any of the following measures to maintain the financial sustainability of your dental practice?

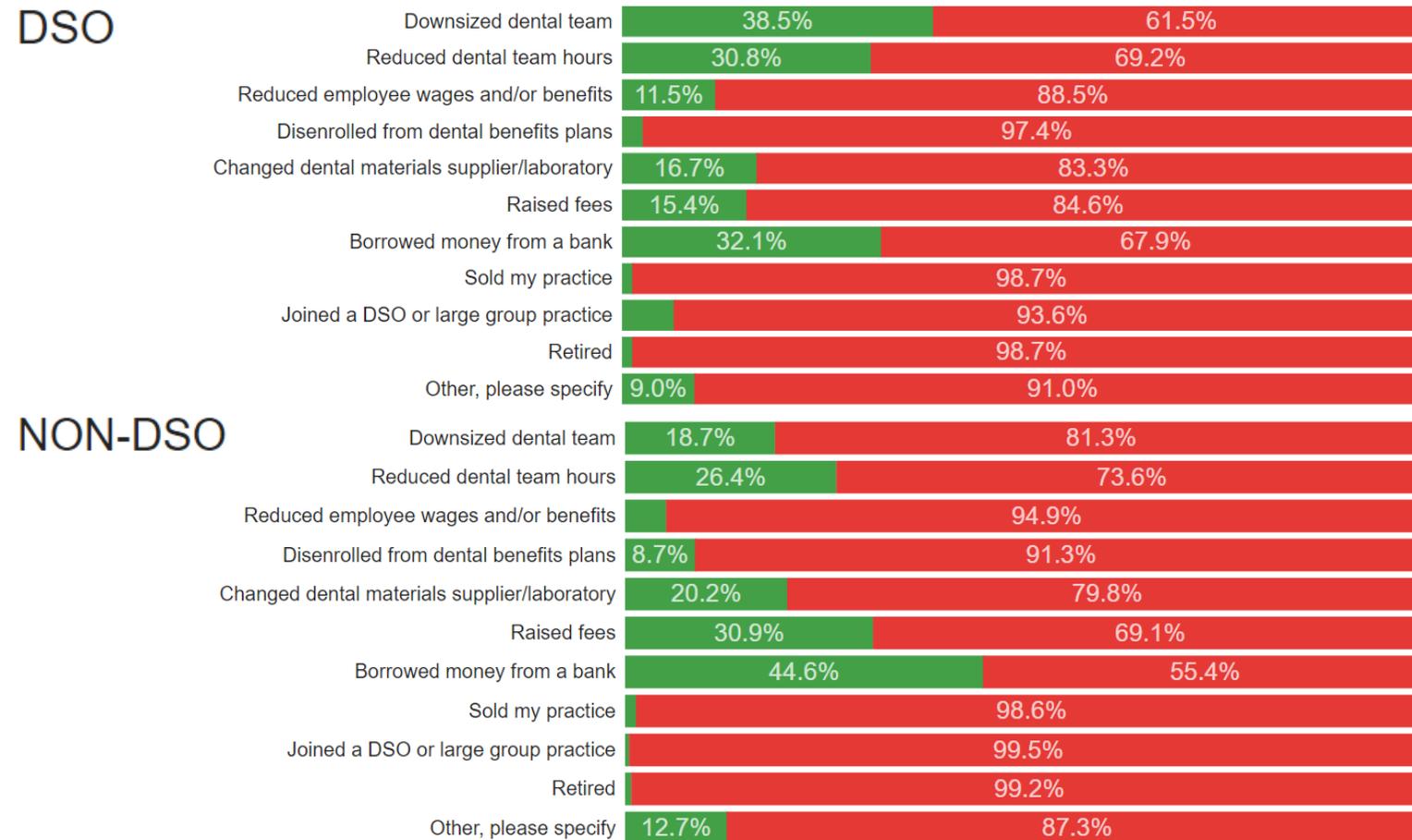
ALL RESPONDENTS



Insight: Dentists have taken various measures to maintain the financial sustainability of their practices, including borrowing from a bank, raising fees, and reducing staffing.

Questions of the Week

Since you reopened, have you taken any of the following measures to maintain the financial sustainability of your dental practice? BY DSO AFFILIATION

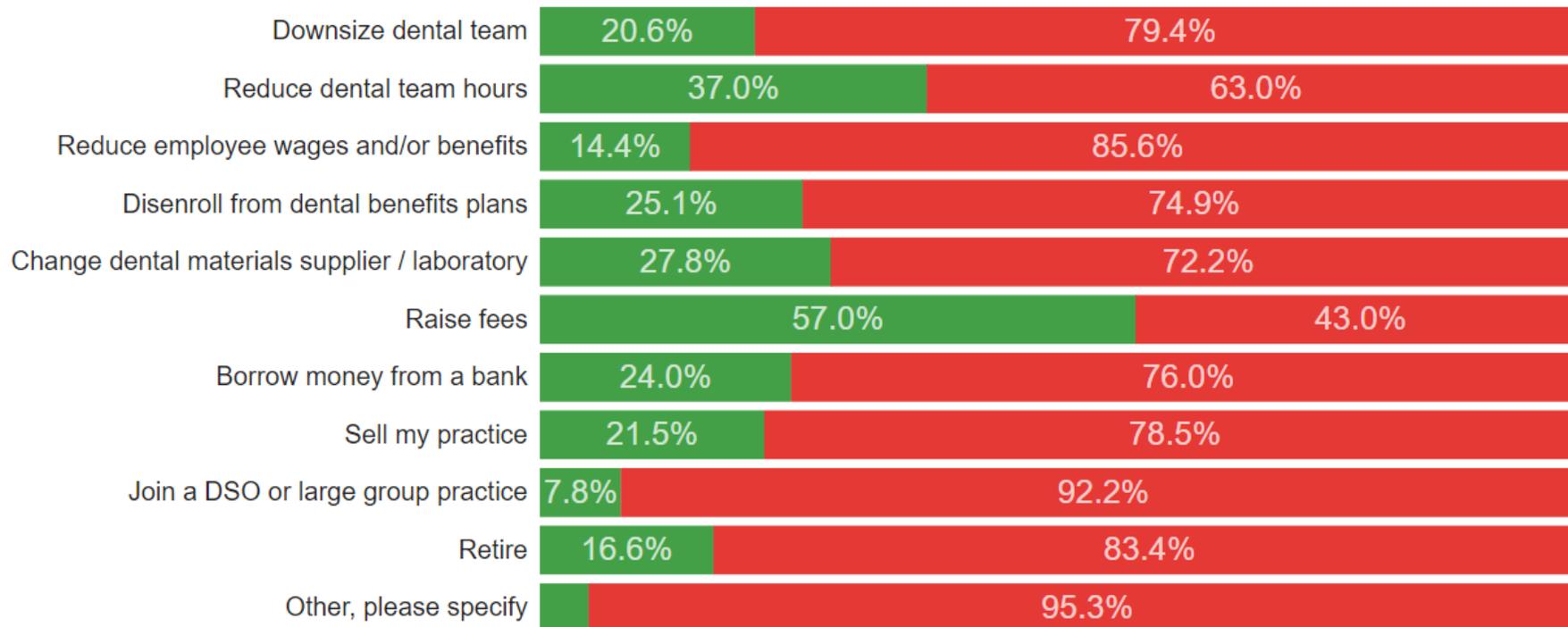


Insight: DSO-affiliated practices have been more likely to downsize the dental team, while practices not affiliated with a DSO have been more likely to raise fees or borrow from a bank.

Questions of the Week

Assuming that your patient volume remains what it is today through the end of the year, would you seriously consider any of the following additional measures?

ALL RESPONDENTS



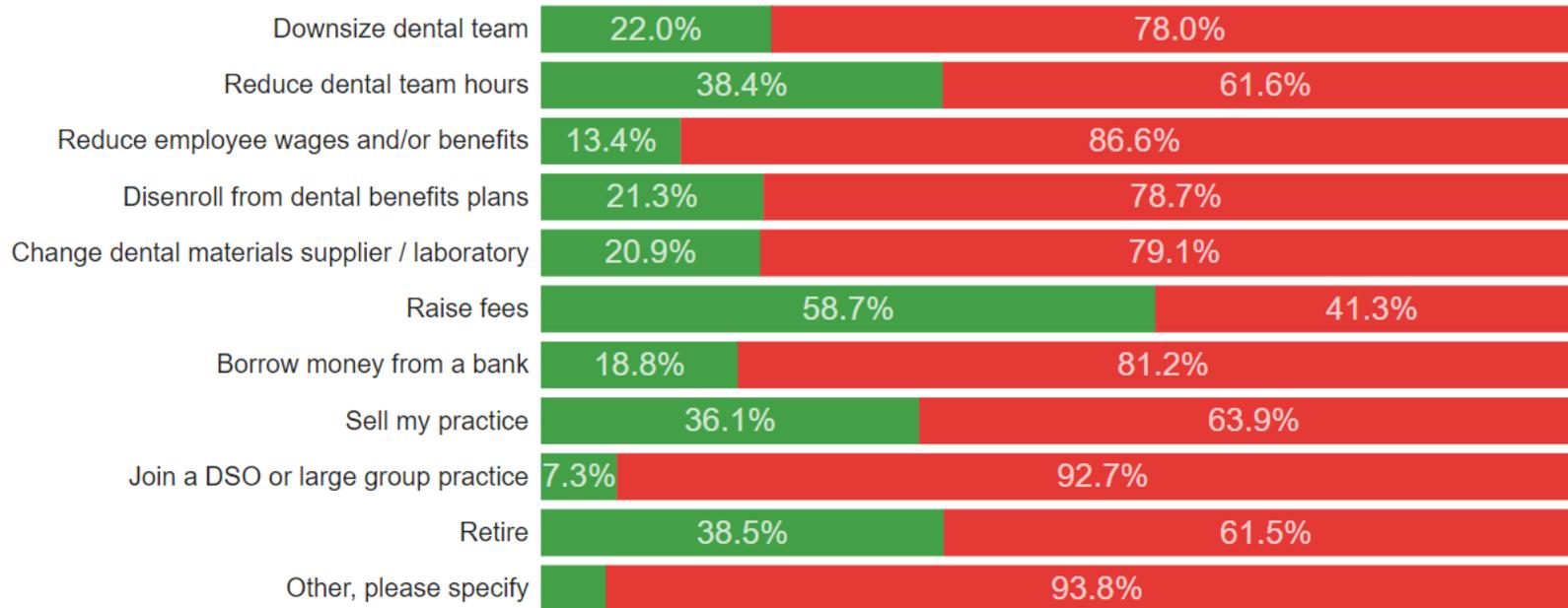
Insight: If patient volume remains stable, dentists are likely to raise fees and reduce their dental team's hours. About 1 in 5 will consider selling their practice and 1 in 6 will consider retiring.

Questions of the Week

Assuming that your patient volume remains what it is today through the end of the year, would you seriously consider any of the following additional measures?

BY AGE GROUP

65 AND OLDER



Insight: More than one-third of dentists 65 and older indicated they would consider selling their practice and roughly 40% indicated they would consider retiring if patient volume remains stable.

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:

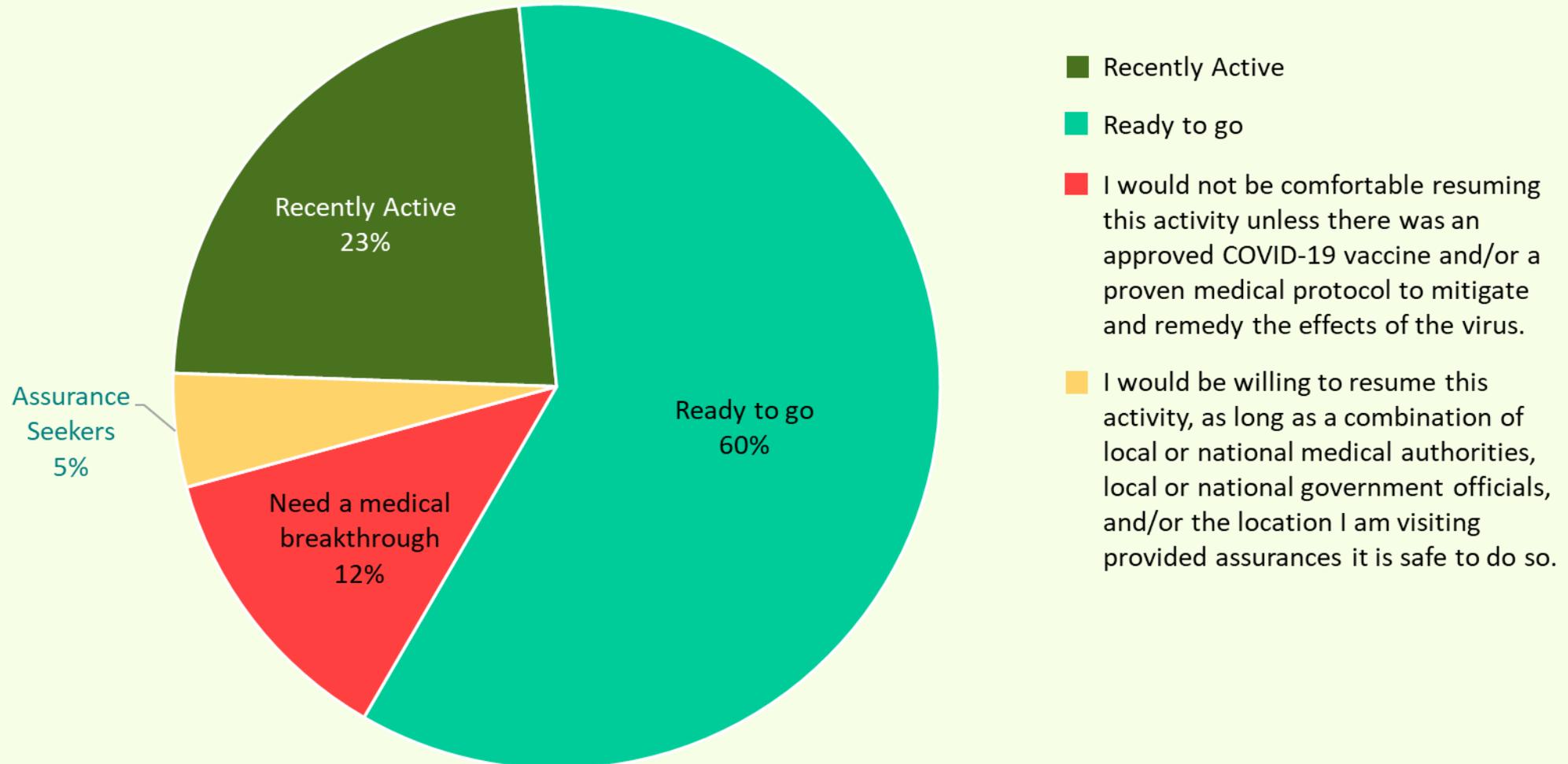
- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**

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



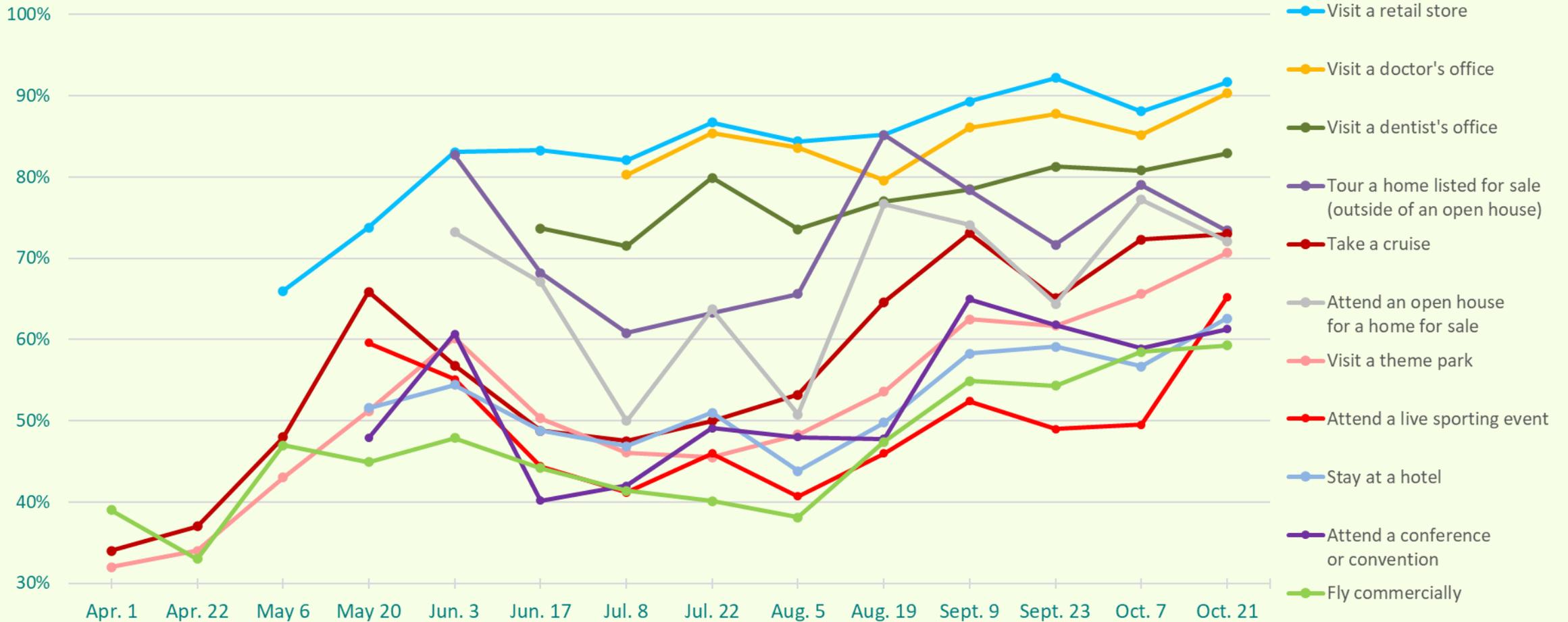
83% READY AND WILLING TO SEE A DENTIST

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



AND DESPITE NEWS, WILLINGNESS TO ENGAGE CONTINUES TO RISE

[Among those who have done this activity in the past 12 months:] For each of the following activities, please indicate which of the following conditions is closest to your current point of view: Recently active + Ready to go



Key Take-Aways from November 16th Data

- **Recovery and Renewal:** As of the week of November 16th, one-third of dental practices reported “business as usual” in terms of patient volume. Patient volume was estimated at 76% of pre-COVID-19 levels, representing a slight decline over the past couple months. Staffing in dental offices was at 90% of pre-COVID-19 levels, slightly down from previous weeks.
- **Patient Capacity:** Nearly all practices have the capacity to see more patients than they are currently seeing. More than one-third report being at 51-75% of their current maximum patient capacity as of the week of November 16th, with fewer than 1 in 10 operating at >95% of their current maximum patient capacity. Large group practices are closer to their current maximum patient capacity.
- **Measures Taken for Financial Sustainability:** Dentists have taken various measures to maintain the financial sustainability of their practice, similar to findings presented in September. DSO-affiliated practices have been more likely to downsize the dental team, while practices not affiliated with a DSO have been more likely to raise fees or borrow from a bank.
- **Future Financial Sustainability Considerations:** If patient volume remains what it was the week of November 16th through the end of the year, dentists are likely to raise fees. Among dentists 65 and older, more than one-third indicated they would be considering selling their practice and roughly 40% would consider retiring.
- **Consumer Sentiment:** Development of a vaccine remains an important part of bringing the remaining patient base back into the dental office.

Thank You!



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