

# The Impact of COVID-19 on the Dental Care Sector

Insights from Data for the Week of October 5<sup>th</sup>

# Today



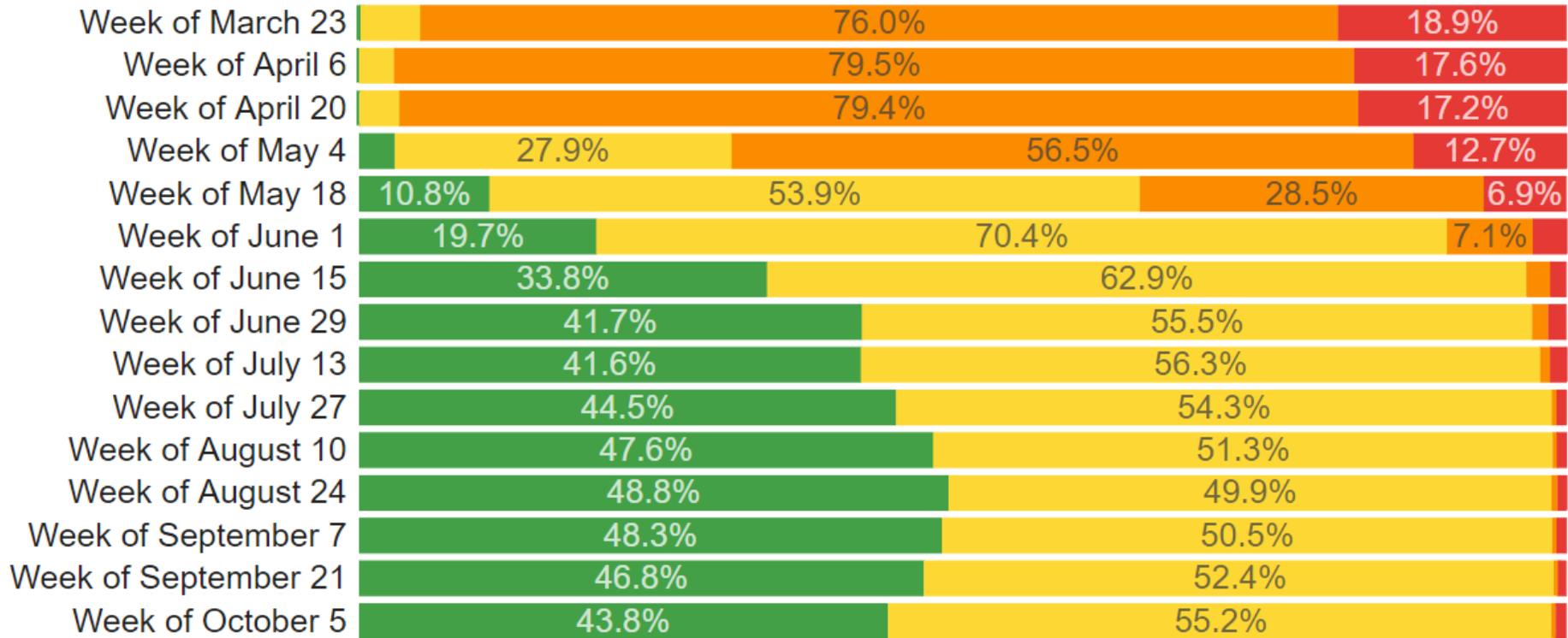
1. *Update on the latest data from HPI economic impact of COVID-19 tracking poll.*
2. *'Question of the Week' data focusing on the difficulty of recruiting dental team members.*
3. *The latest consumer sentiment data related to dental visits.*

# HPI Impact of COVID-19 Tracking Poll

- Bi-weekly poll beginning March 23<sup>rd</sup>.
- 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](http://www.ada.org/hpi).

# Core Questions

## What is the current status of your dental practice?



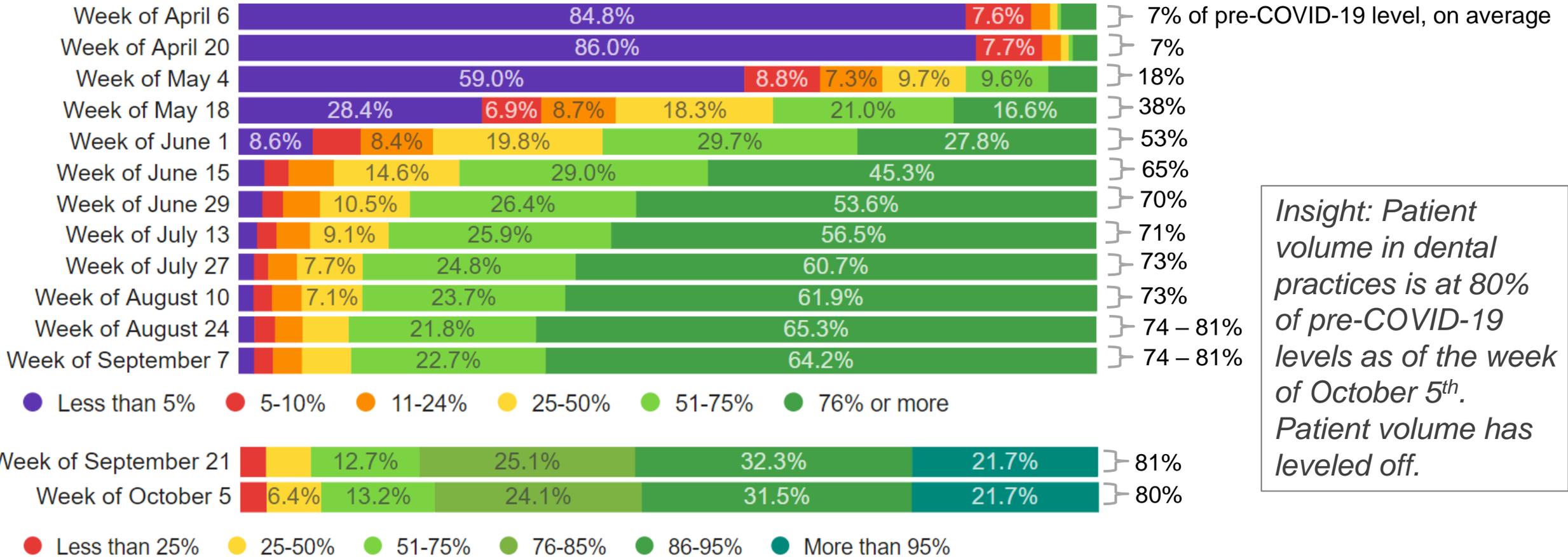
- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

*Insight: As of the week of October 5<sup>th</sup>, 99% of dental practices in the U.S. were open. Less than half of open practices reported “business as usual” in terms of patient volume. This has declined slightly over the past month.*

# Core Questions

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

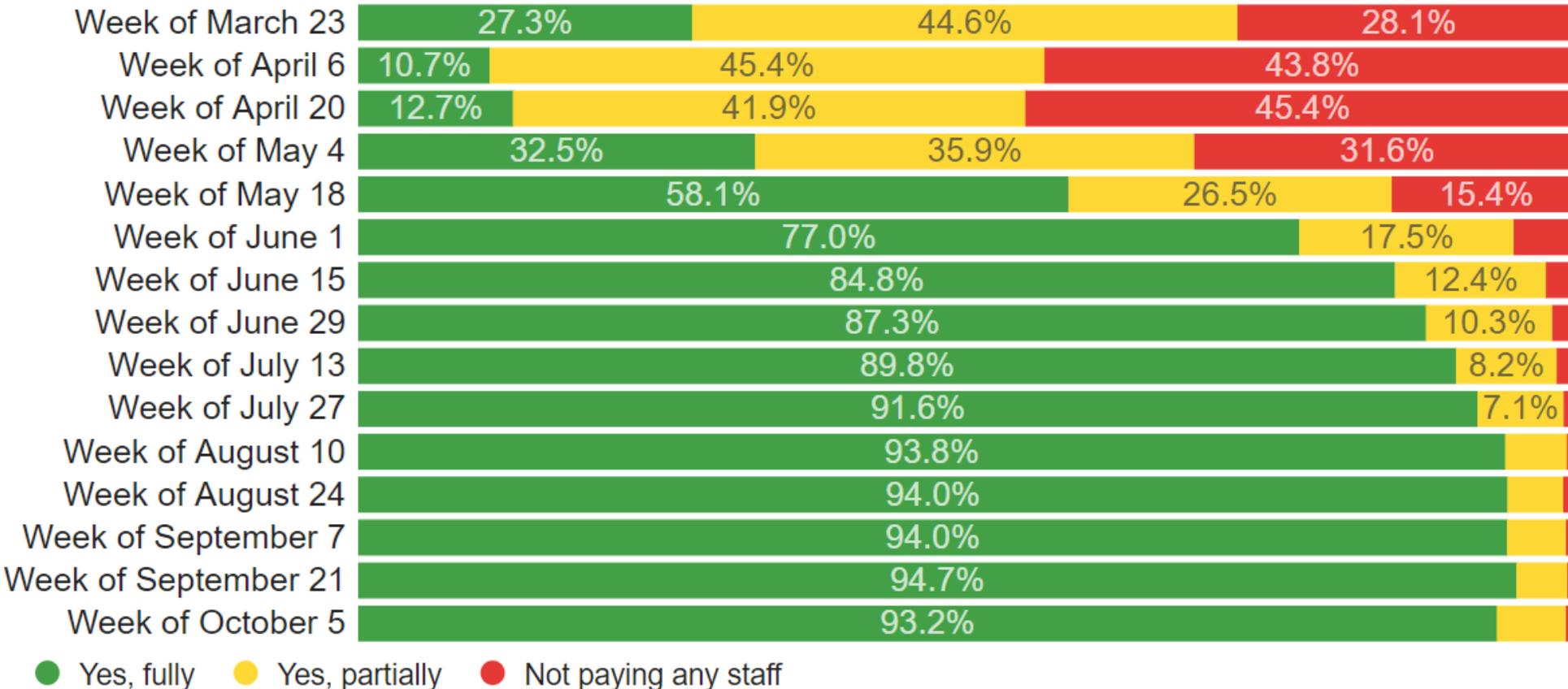
## Total Patient Volume



*Insight: Patient volume in dental practices is at 80% of pre-COVID-19 levels as of the week of October 5<sup>th</sup>. Patient volume has leveled off.*

# Core Questions

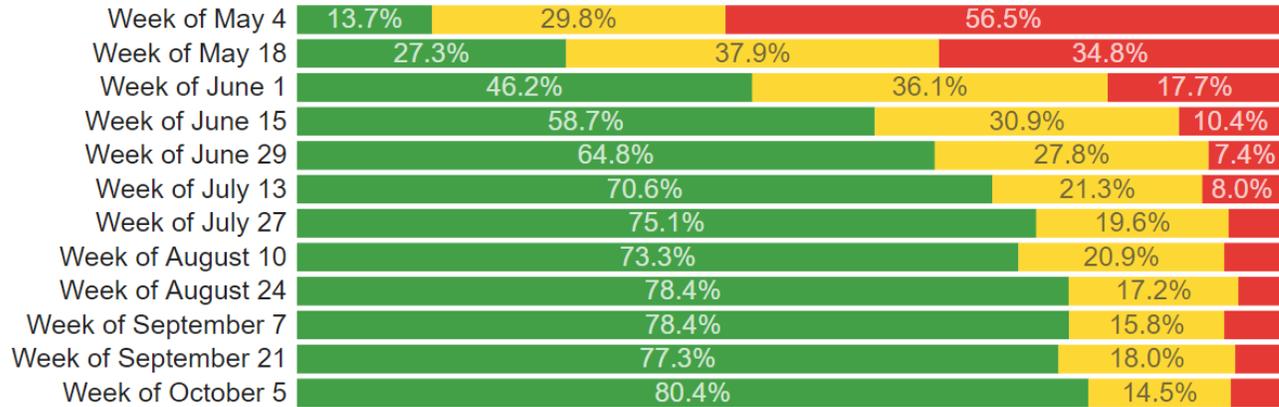
## Is your dental practice paying staff this week?



*Insight: Staffing in dental practices was at roughly 93% of pre-COVID-19 levels the week of October 5<sup>th</sup>. This has been stable for several weeks.*

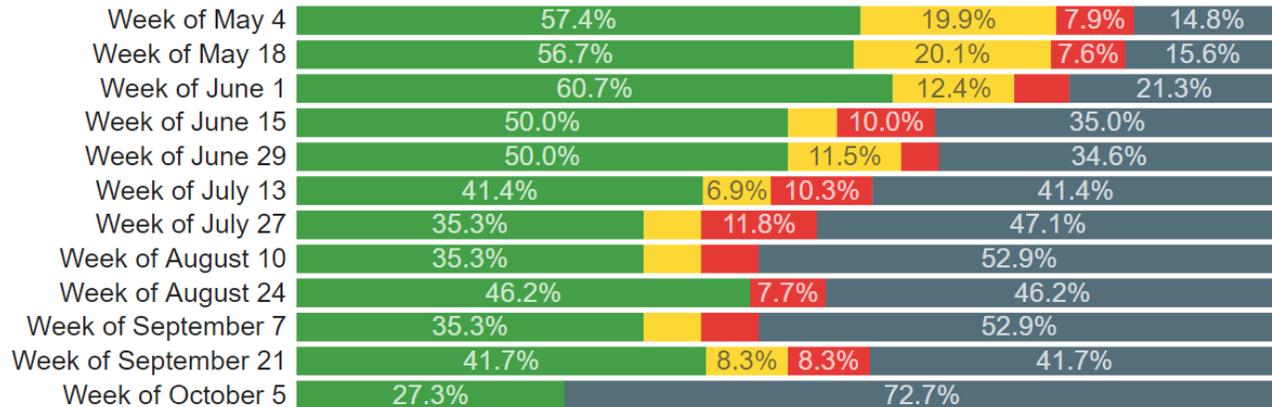
# Core Questions

## [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?



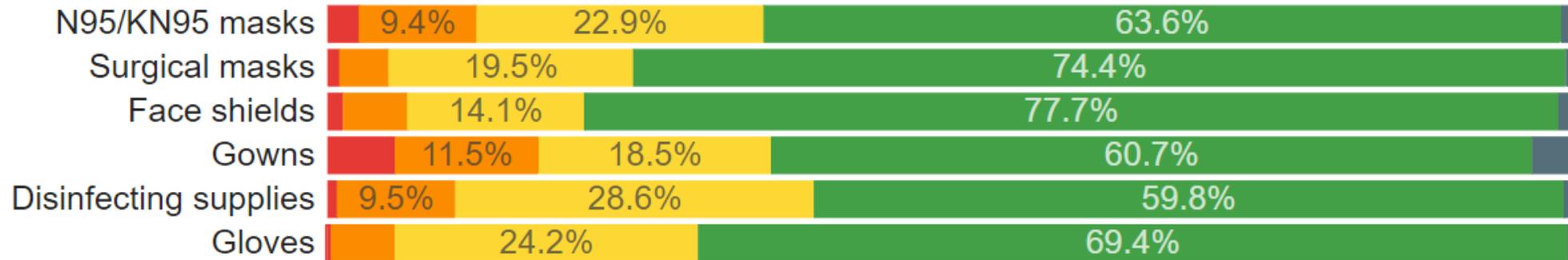
● Yes ● I've applied, but have not received any benefits yet ● No, my application was not approved  
● No, I have not applied

*Insight: Employee dentists have seen the biggest lingering employment effect. Roughly 20% of employee dentists were being paid partially or not at all as of the week of October 5<sup>th</sup>.*

*For those not being paid at all, less than 30% were receiving unemployment benefits.*

# Core Questions

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

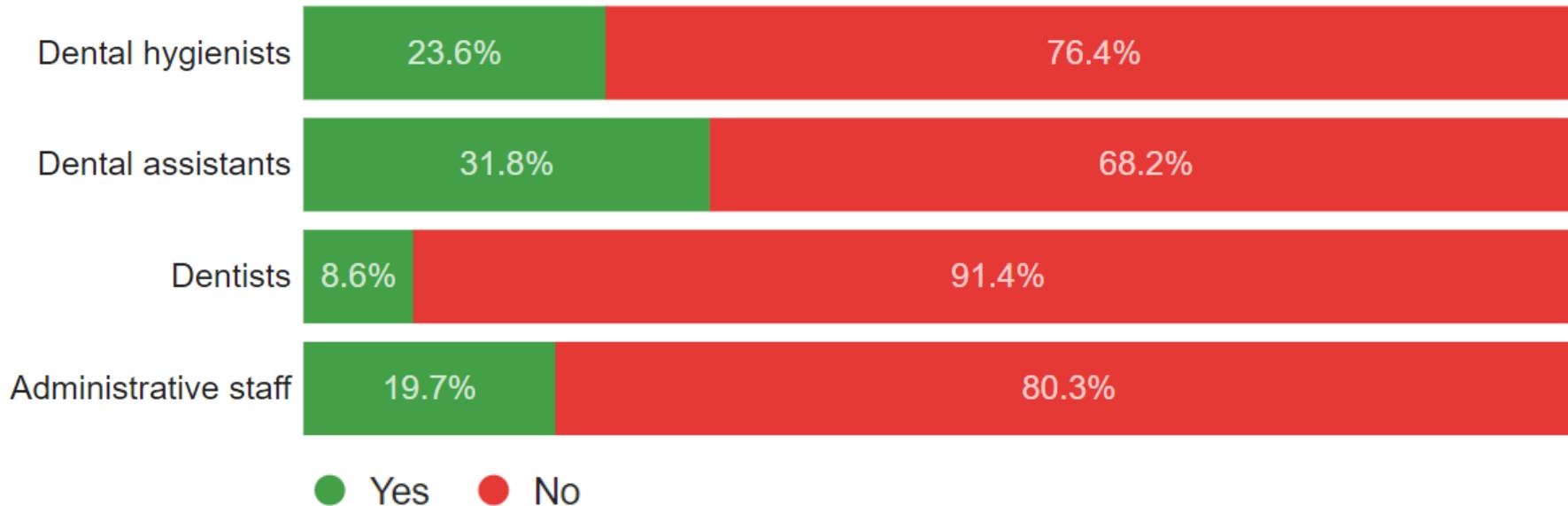


● 0 days ● 1 to 7 days ● 8 to 14 days ● More than 14 days ● Not sure

*Insight: PPE availability in dental practices has been stable for several months. Gowns and N95/KN95 masks remain the biggest issue, as well as disinfecting supplies and gloves.*

# Question of the Week

**[Owners only] Have you recently or are you currently recruiting any of the following positions in your dental practice?**

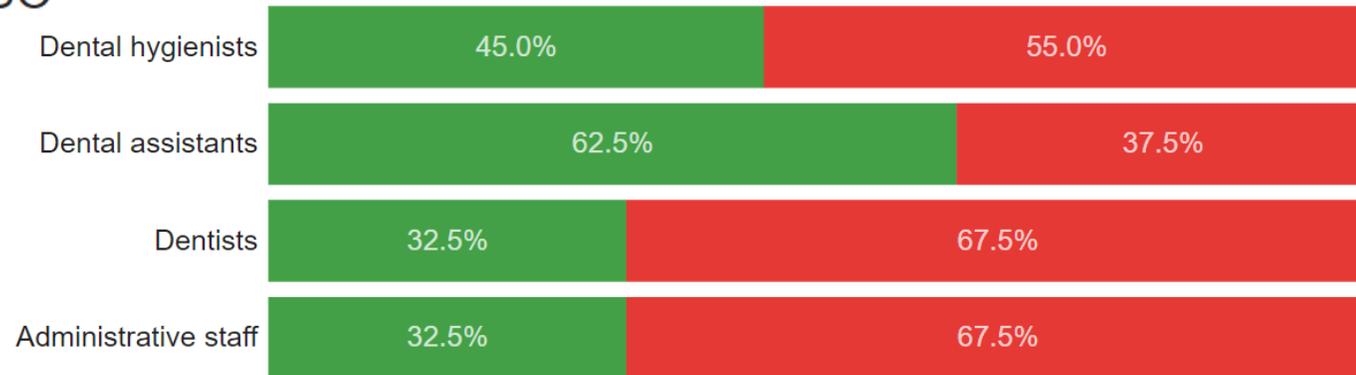


*Insight: Roughly one-third of owner dentists have recently or are currently recruiting dental assistants and 24% are recruiting hygienists.*

# Question of the Week

**[Owners only] Have you recently or are you currently recruiting any of the following positions in your dental practice?**

## DSO



## NON-DSO

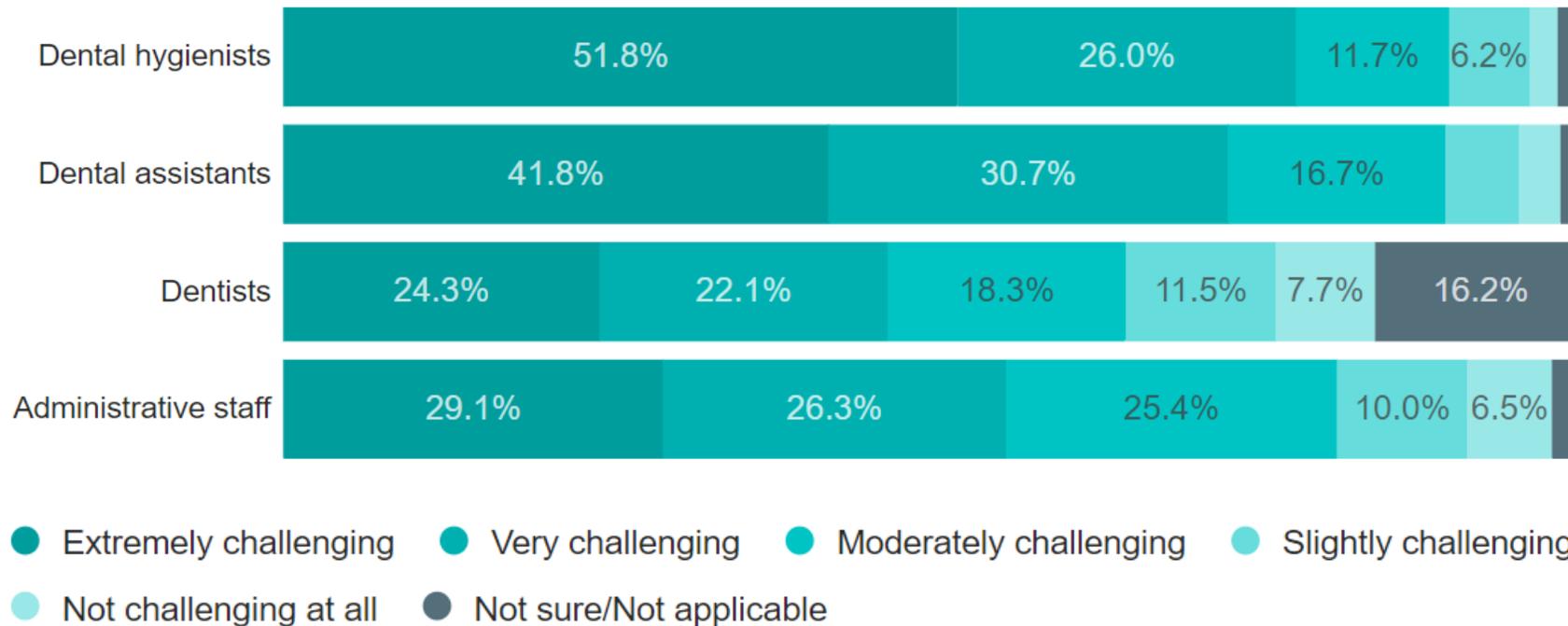


● Yes ● No

*Insight: More DSO-affiliated and large group practices are recruiting compared to non-DSO-affiliated and smaller practices.*

# Question of the Week

Compared to before the COVID-19 pandemic, how challenging was it to recruit the following position(s) below?



*Insight: Recruiting dental team members has been much more challenging for owner dentists compared to before the COVID-19 pandemic. Nearly 80% reported it was extremely or very challenging to recruit hygienists, and roughly 70% said the same for assistants.*

# 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:

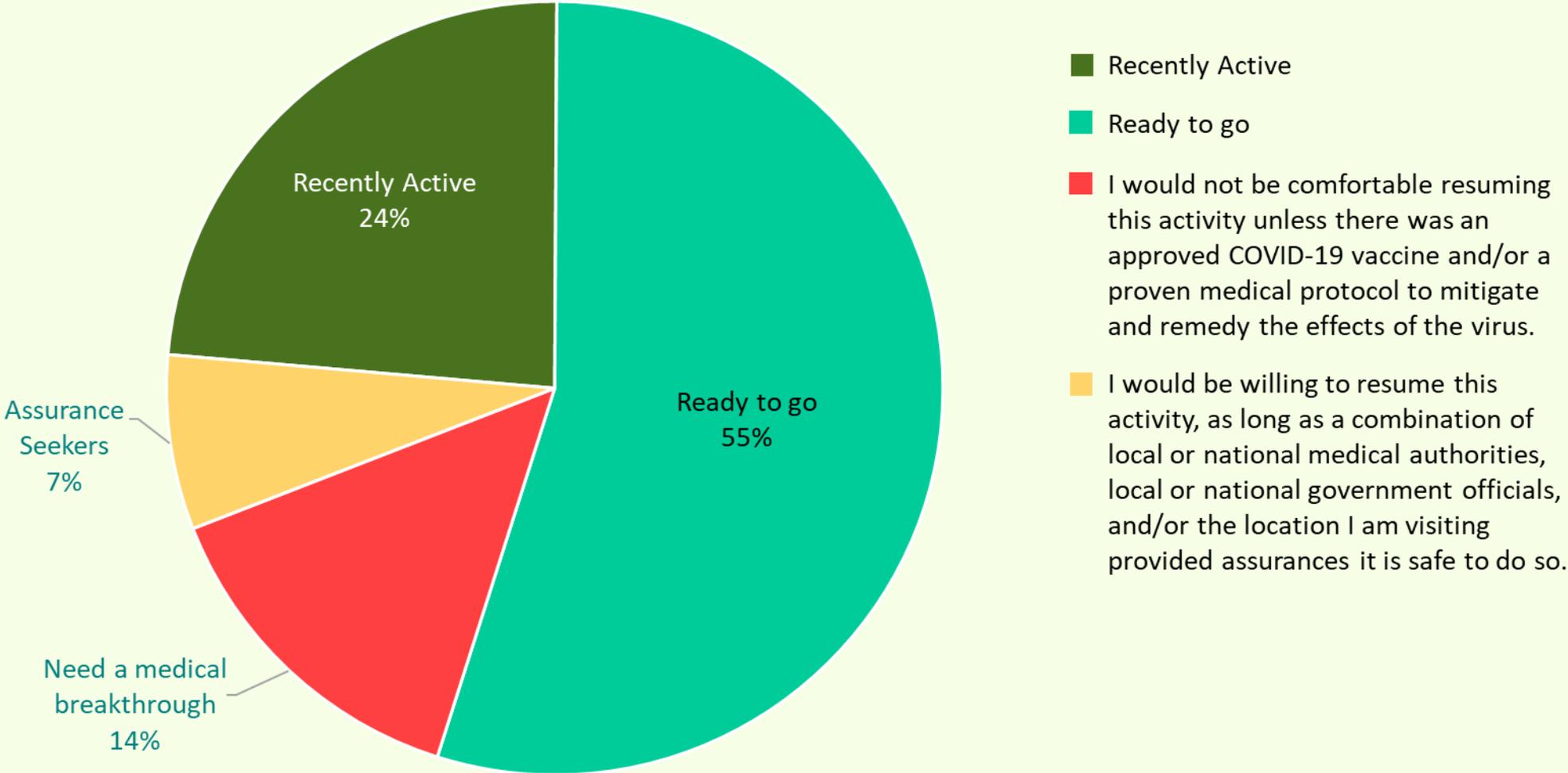
- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**

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



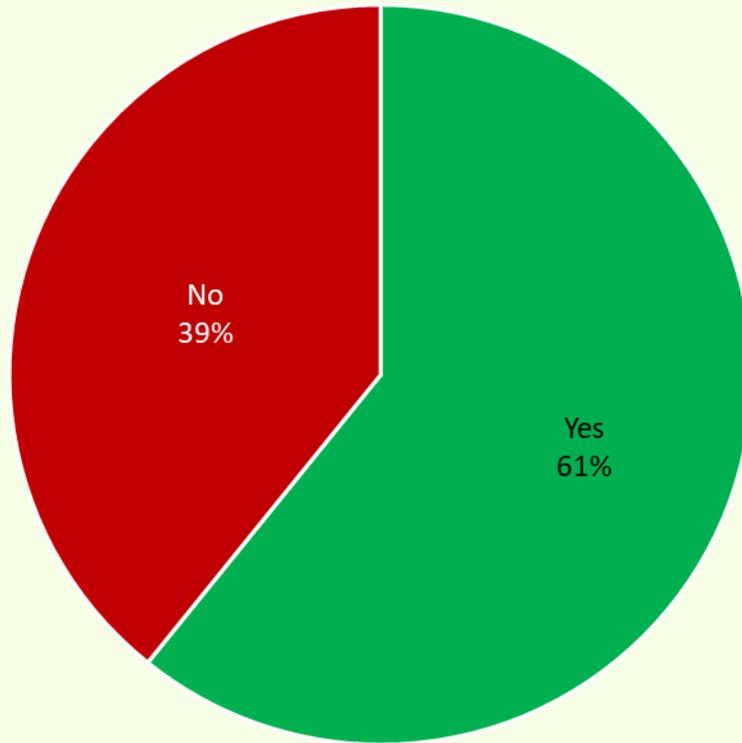
# READY OR NOT: VISIT A DENTIST'S OFFICE

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

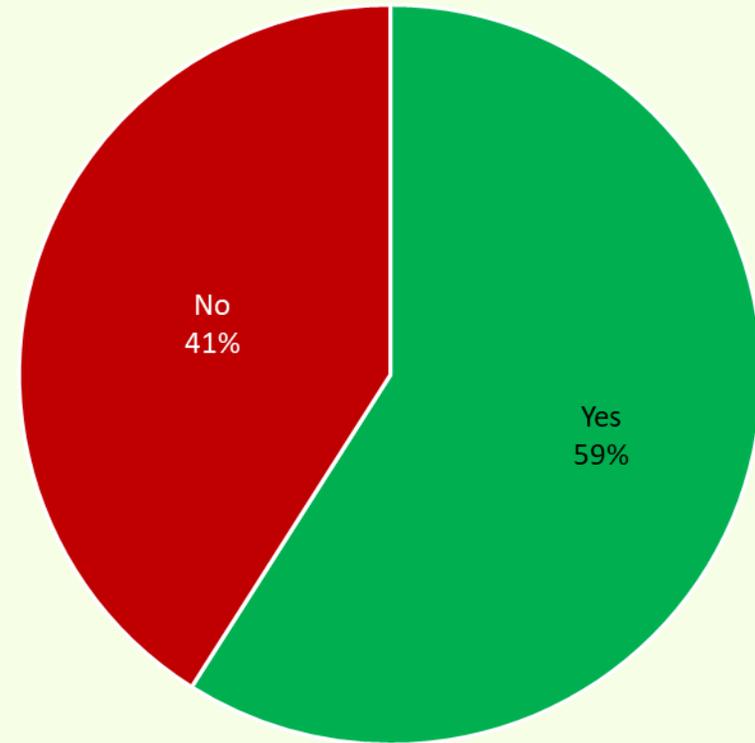


# WILLING TO GET A SHOT WHILE ALREADY VISITING DENTIST

If you were already scheduled for a routine dental visit, would you be willing to get an annual flu shot while at the dentist's office?



Imagine a COVID-19 vaccine is currently available. If you were already scheduled for a routine dental visit, would you be willing to get a COVID-19 vaccine while at the dentist's office?



# Key Take-Aways from October 5<sup>th</sup> Data

- **Recovery:** As of the week of October 5<sup>th</sup>, 99% of dental offices in the U.S. were open and patient volume was estimated at 80% of pre-COVID-19 levels. Staffing was at 93% of pre-COVID-19 levels. These values have been roughly unchanged for several weeks and suggest we have reached a “steady state” of economic activity in dental offices.
- **Dentists are hiring:** Roughly one-third of dental practices are recruiting dental assistants and one quarter are recruiting hygienists. DSO-affiliated practices and large groups are recruiting more heavily than non-DSO and solo practices.
- **Recruitment is a challenge:** Recruiting dental team members is challenging. Among dentists hiring for any position (i.e., hygienists, assistants, administrative staff, or dentists), the majority report that it has been extremely or very challenging compared to before the COVID-19 pandemic. Nearly 80% reported it was extremely or very challenging to recruit hygienists, and roughly 70% said the same for assistants.
- **Patients are willing to get vaccinated at the dental office:** Consumers are open to the idea of vaccination at the dental office as part of their dental visit. If an annual flu shot could be incorporated into a routine dental visit, the majority of consumers report they would be interested in that option. If a COVID-19 vaccine were available and patients could get the vaccine at their dentist’s office during their appointment, the majority would be interested.

# Thank You!



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