

The Impact of COVID-19 on the Dental Care Sector

Insights from Data for the Week of October 19th

Today



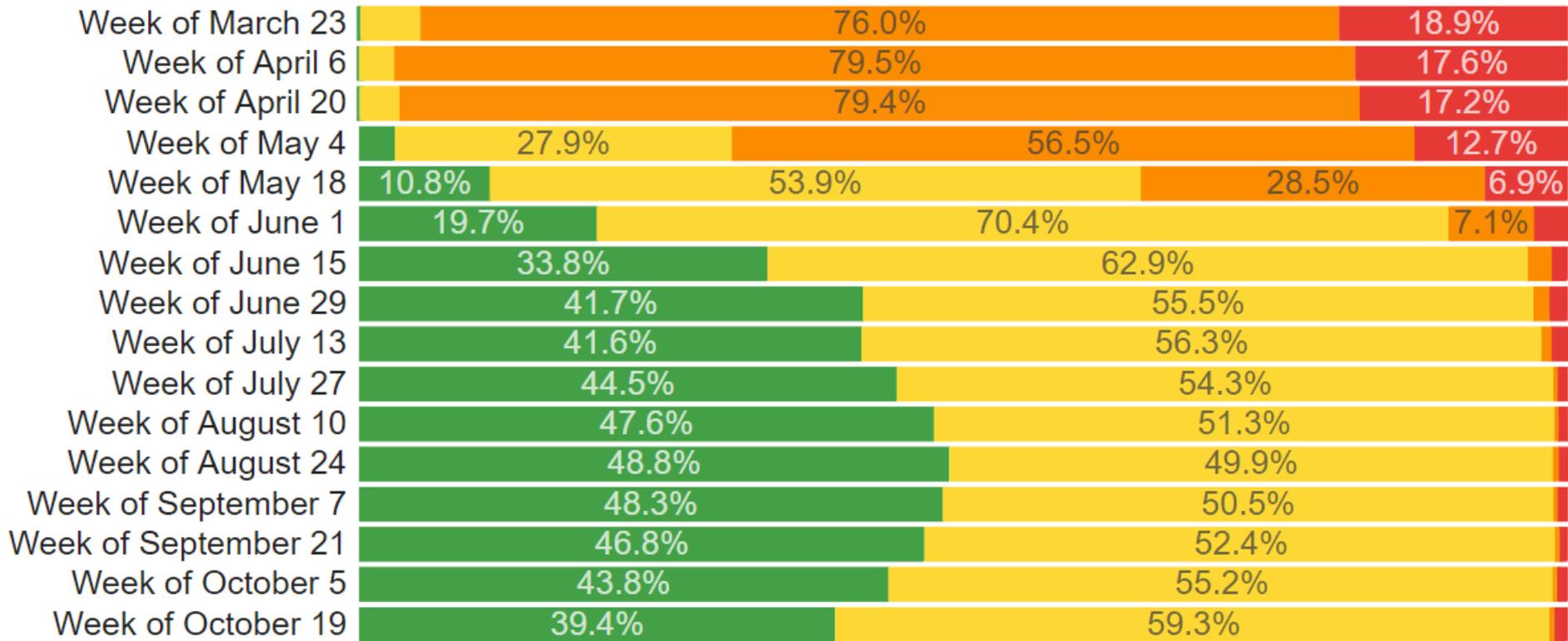
1. *Update on the latest data from HPI economic impact of COVID-19 tracking poll.*
2. *Analysis of patient volumes by urban, suburban, and rural practice settings.*
3. *The latest consumer sentiment data related to dental visits.*

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?



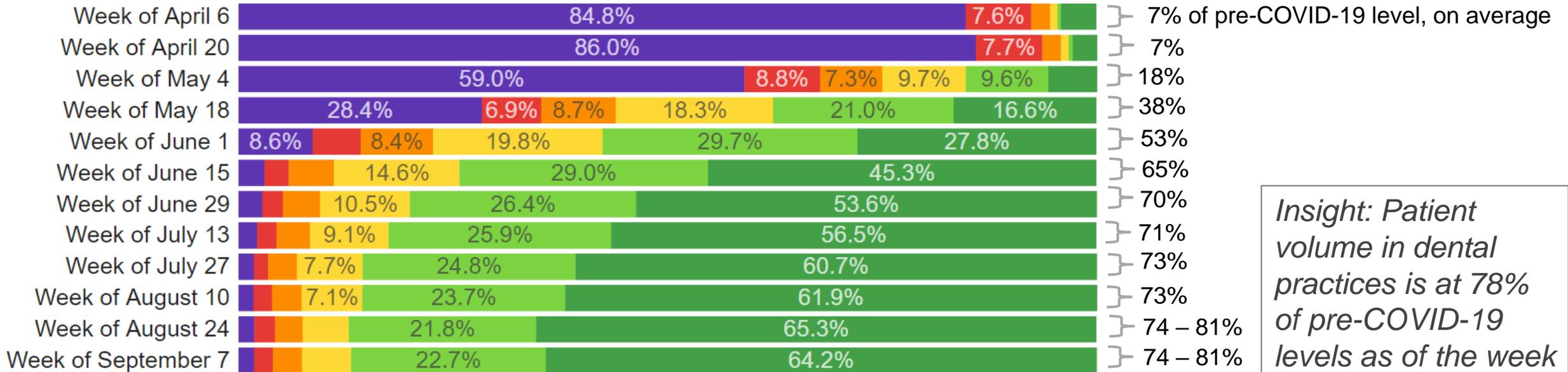
- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

Insight: As of the week of October 19th, 99% of dental practices in the U.S. were open. About 40% of open practices reported “business as usual” in terms of patient volume. This has declined over the past couple months.

Core Questions

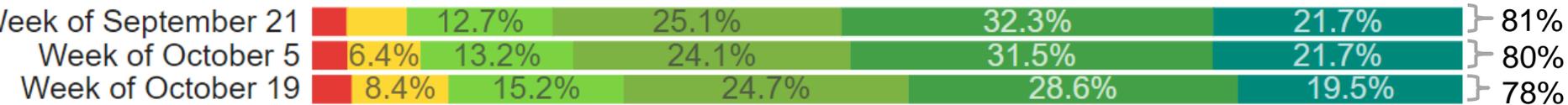
How does this week compare to what is typical in your practice, in terms of... *

Total Patient Volume



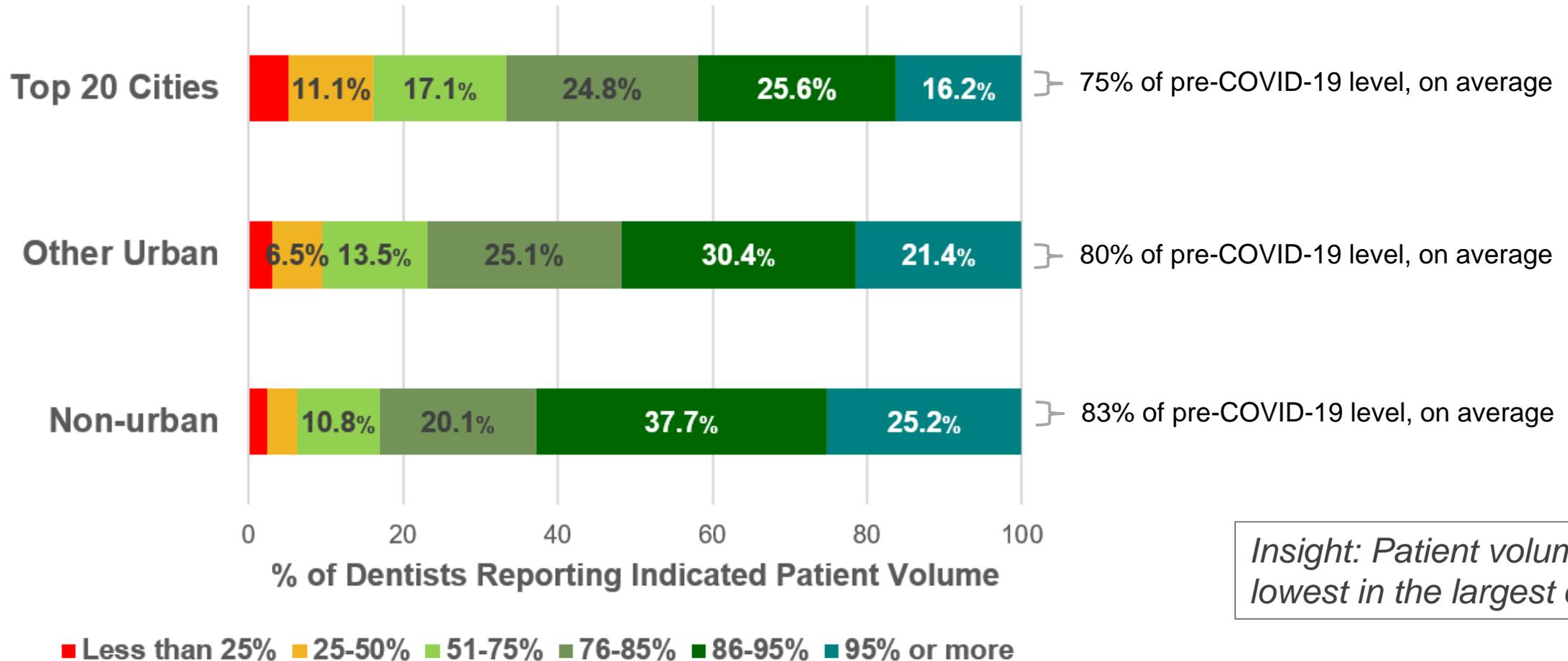
● Less than 5%
 ● 5-10%
 ● 11-24%
 ● 25-50%
 ● 51-75%
 ● 76% or more

Insight: Patient volume in dental practices is at 78% of pre-COVID-19 levels as of the week of October 19th. This represents a slight decrease over the past month.



● Less than 25%
 ● 25-50%
 ● 51-75%
 ● 76-85%
 ● 86-95%
 ● More than 95%

Patient Volume by Geography



Data from the Week of October 5th.

COVID-19 Cases and Patient Volume

Change in COVID Cases Per 100K Persons vs Change in Patient Volume

September 21 - October 19, 2020

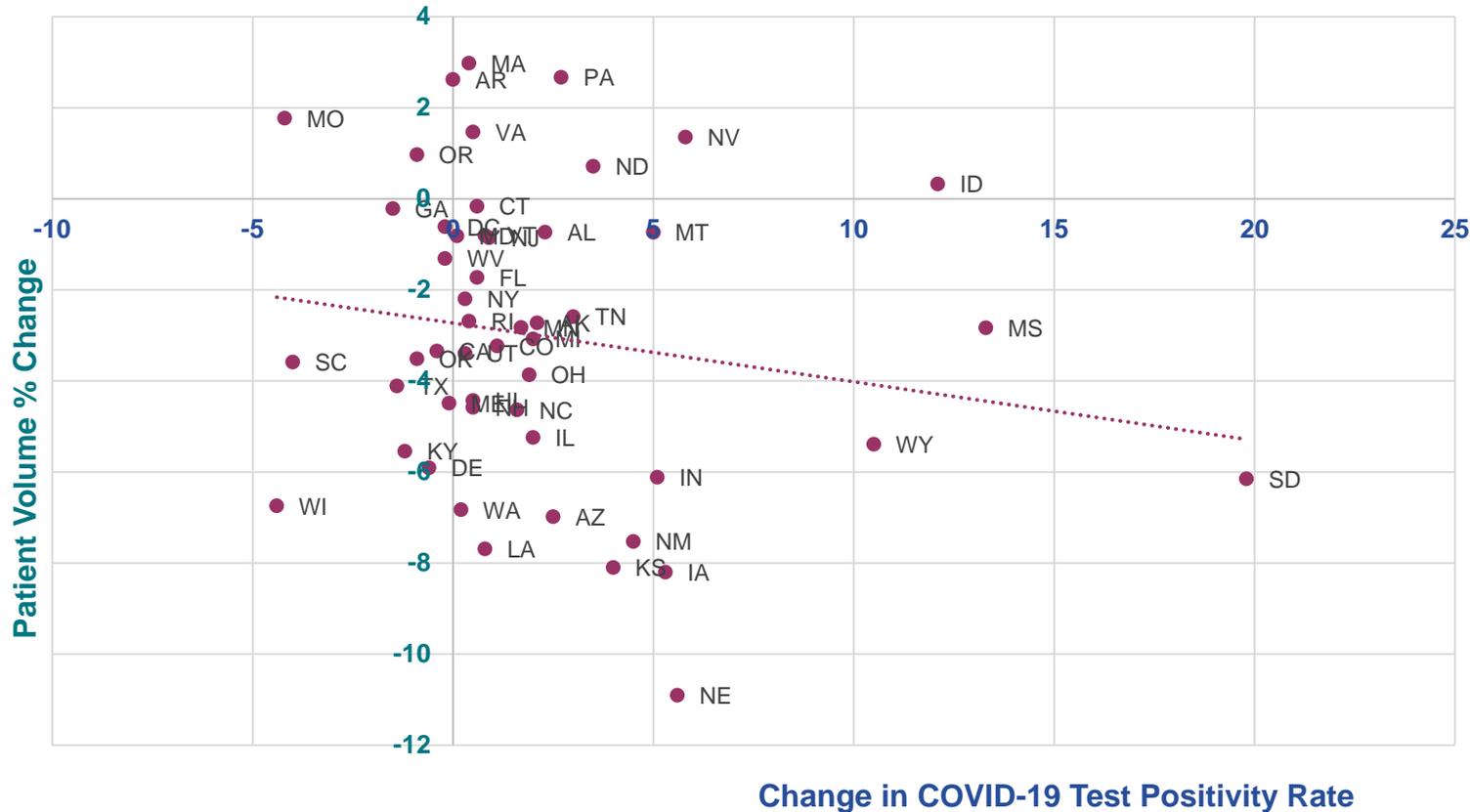


Insight: There is a very weak relationship between COVID-19 cases and patient volume at the state level. States with a greater increase in COVID-19 cases have a slightly greater decline in patient volume over the past month.

COVID-19 Test Positivity Rate and Patient Volume

Change in COVID-19 Test Positivity Rate by Change in Patient Volume

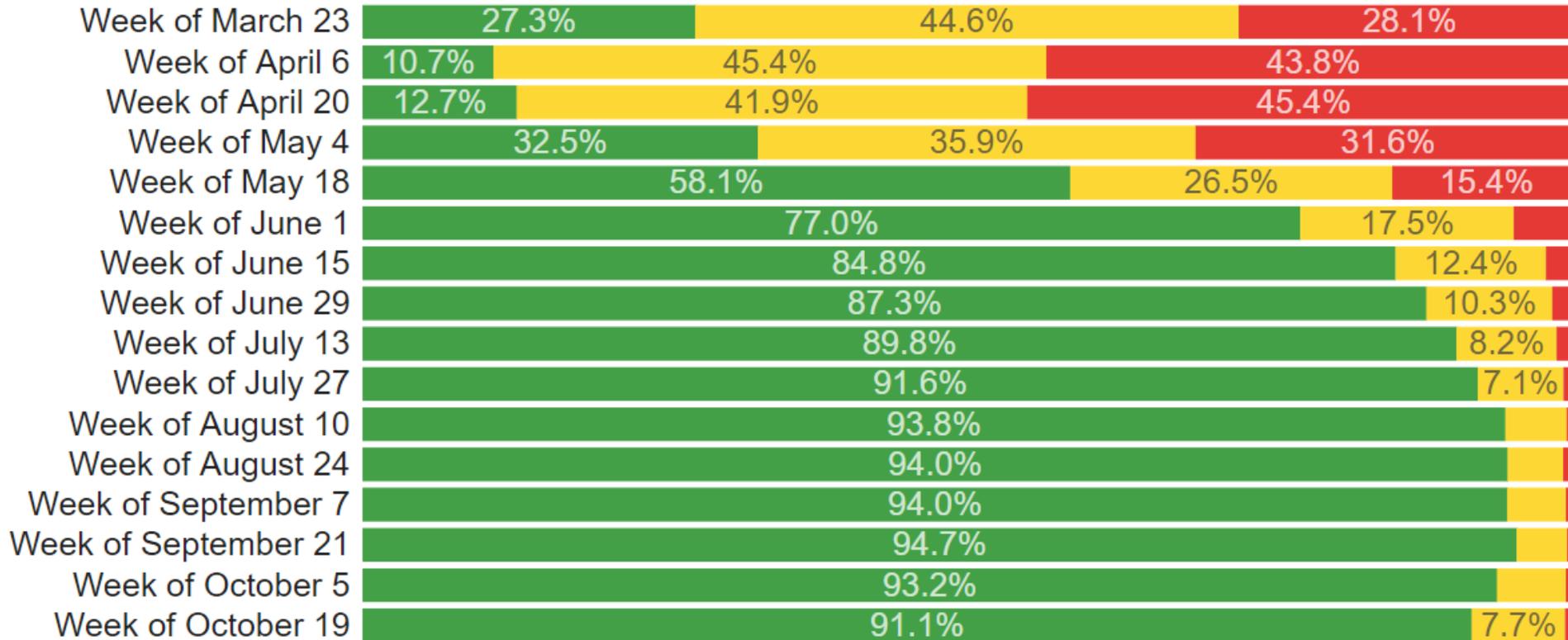
September 21 - October 19, 2020



Insight: Patient volume is, at most, very slightly correlated with COVID-19 test positivity rates.

Core Questions

Is your dental practice paying staff this week?

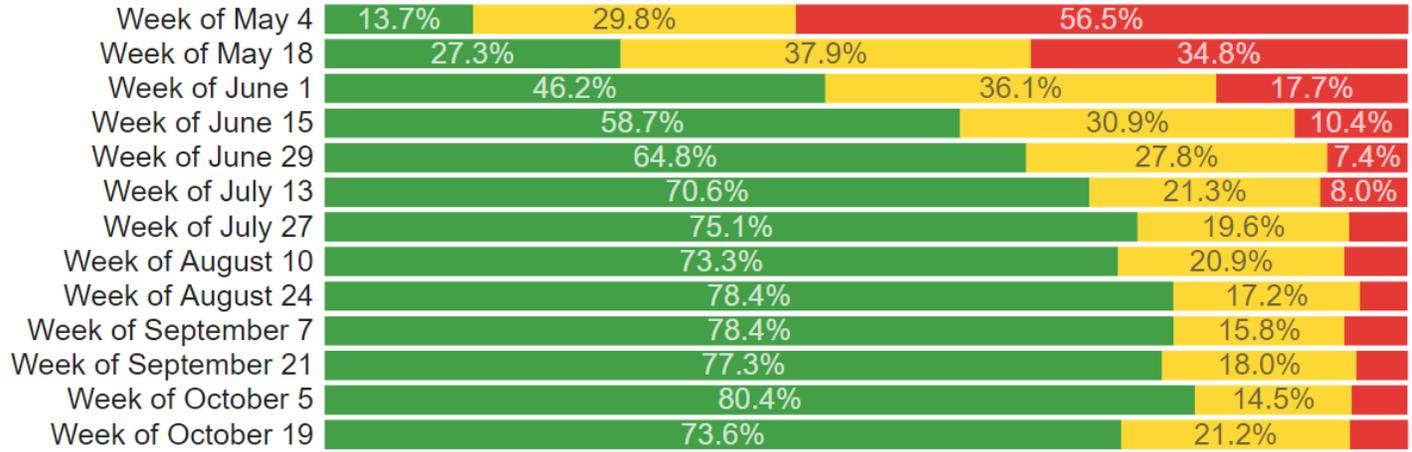


● Yes, fully ● Yes, partially ● Not paying any staff

Insight: Staffing in dental practices was at roughly 91% of pre-COVID-19 levels the week of October 19th. This has declined slightly over the past month.

Core Questions

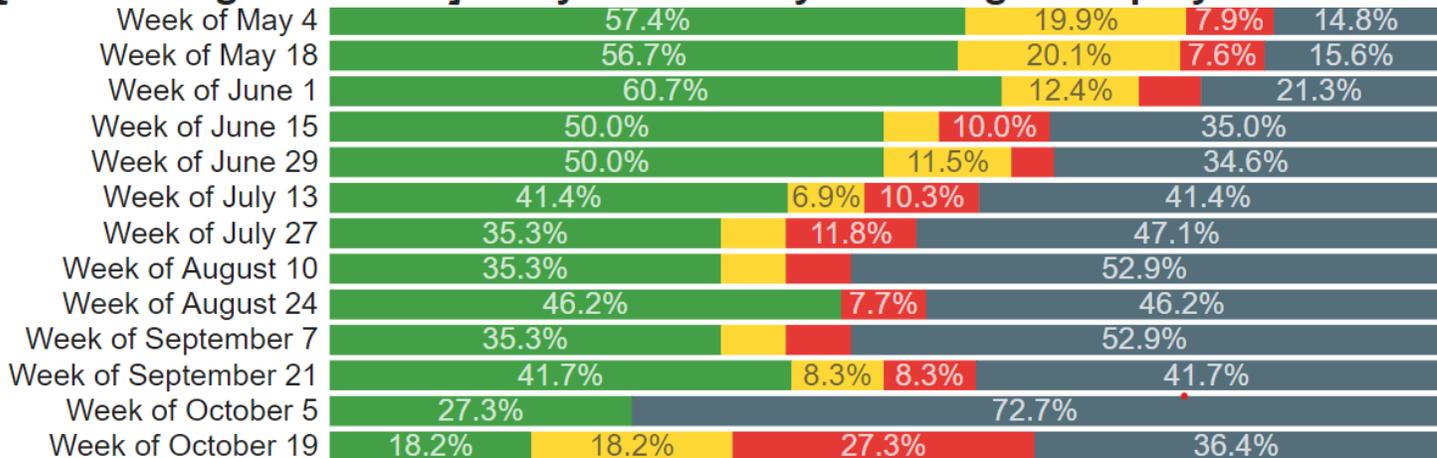
[If non-owner dentist] Are YOU being paid this week? ● Yes, fully ● Yes, partially ● Not being paid at all



Insight: Employee dentists have seen the biggest lingering employment effect. Roughly 26% of employee dentists were being paid only partially or not at all as of the week of October 19th.

For those not being paid at all, less than 20% were receiving unemployment benefits.

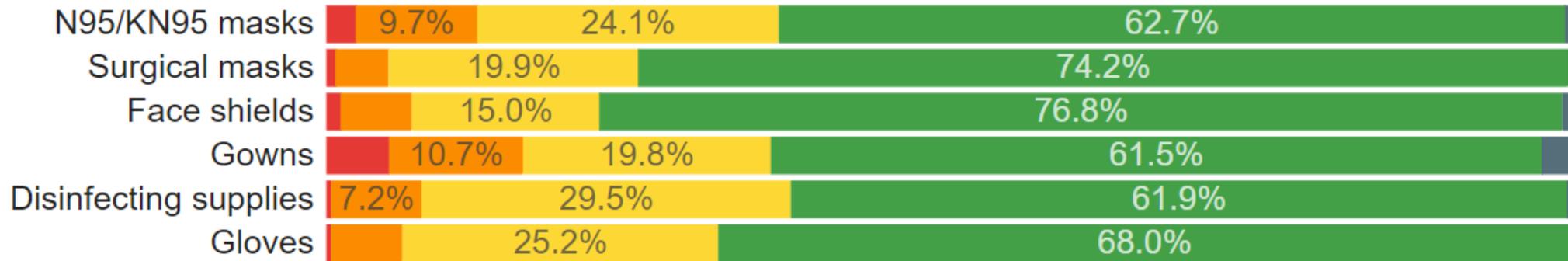
[If Not Being Paid at All] Are you currently receiving unemployment benefits?



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

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. Disinfecting supplies, gowns, and N95s remain the biggest issue.

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:

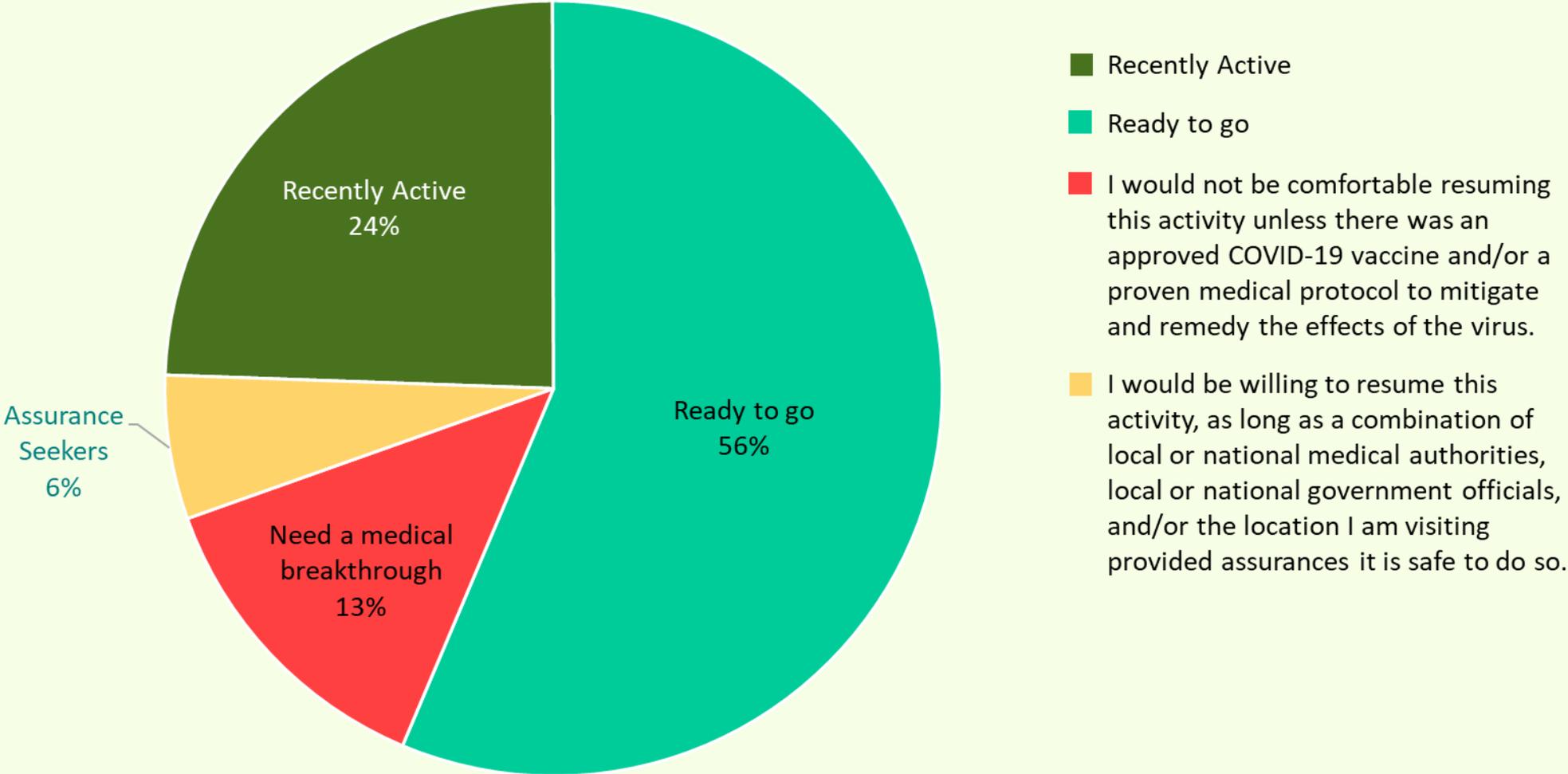
- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**

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



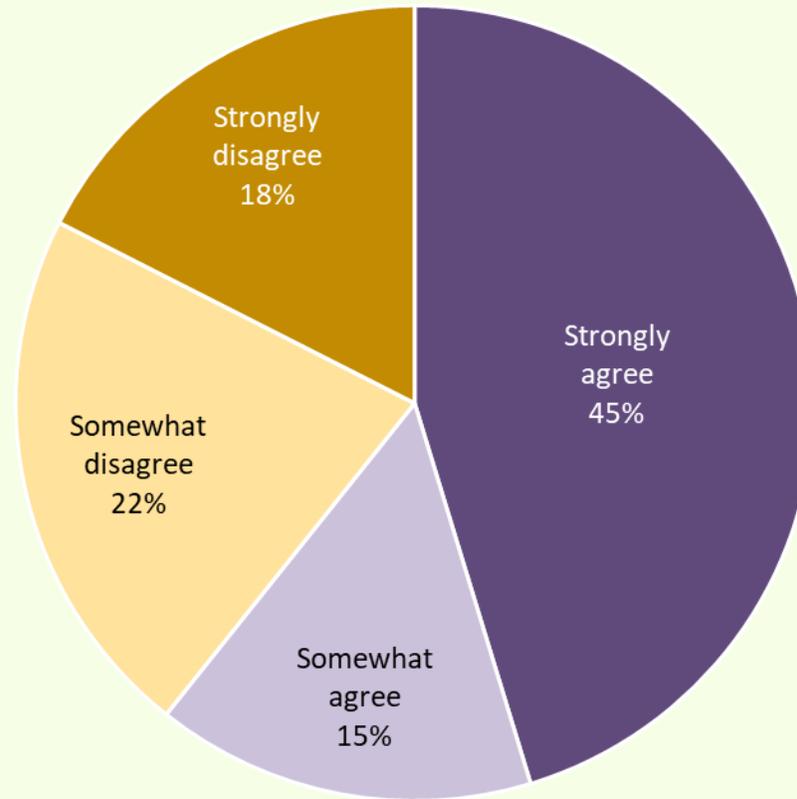
MOST WOULD VISIT A DENTIST, OR ALREADY HAVE

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



60% SAY IT'S SAFER TO VISIT DENTIST NOW THAN IN APRIL

It's safer to visit the dentist now, than it was back in April.



Key Take-Aways from October 19th Data

- **Recovery:** As of the week of October 19th, 99% of dental offices in the U.S. were open, but fewer reported “business as usual” in terms of patient volume. In fact, patient volume was estimated at 78% of pre-COVID-19 levels, a very slight decline over previous weeks. Staffing in dental offices was at 91% of pre-COVID-19 levels, a very slight decline from previous weeks. The latest data suggest that we are firmly in a “new normal” or maybe even that economic activity in dental offices might be starting to slow.
- **Urban vs Rural Practice Recovery:** Recovery is not being felt equally by all dentists in terms of geography. Dentists practicing in the 20 largest cities reported lower patient volume numbers than those in rural areas or smaller urban areas. Many factors could be driving this.
- **COVID-19 Cases and Patient Volume:** Given the recent rise in COVID-19 cases in many parts of the country, HPI explored whether there is a relationship between COVID-19 cases and patient volume by state, as well as COVID-19 test positivity rates and patient volume. Patient volume is, at most, only very slightly correlated with both COVID-19 cases and test positivity rates.
- **Consumer attitudes to visiting the dentist:** Among people that went to the dentist regularly pre-COVID-19, about 80% are either comfortable going or have already been to the dentist during the COVID-19 pandemic. The rest are a mix of those that are seeking further assurances (6%) or simply will not return until the pandemic is under control (13%). In addition, the majority of Americans believe it is safer to visit the dentist now than it was in April.

Thank You!



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