

The Impact of COVID-19 on the Dental Care Sector

Insights from Data for Week of September 7th

HPI Health Policy Institute

ADA American Dental Association®



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Today



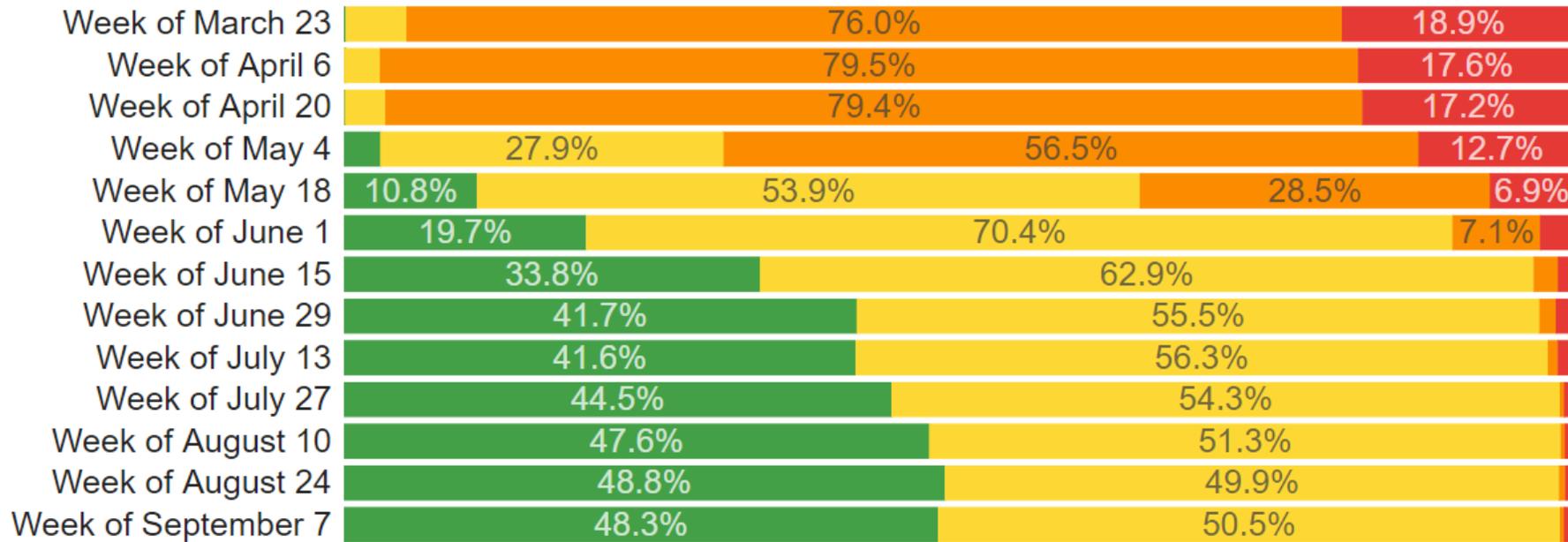
1. *Update on the latest data from HPI economic impact of COVID-19 tracking poll.*
2. *'Question of the Week' data focusing on testing, vaccination, and financial relief programs.*
3. *The latest consumer sentiment data related to dental visits.*

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 4,000 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

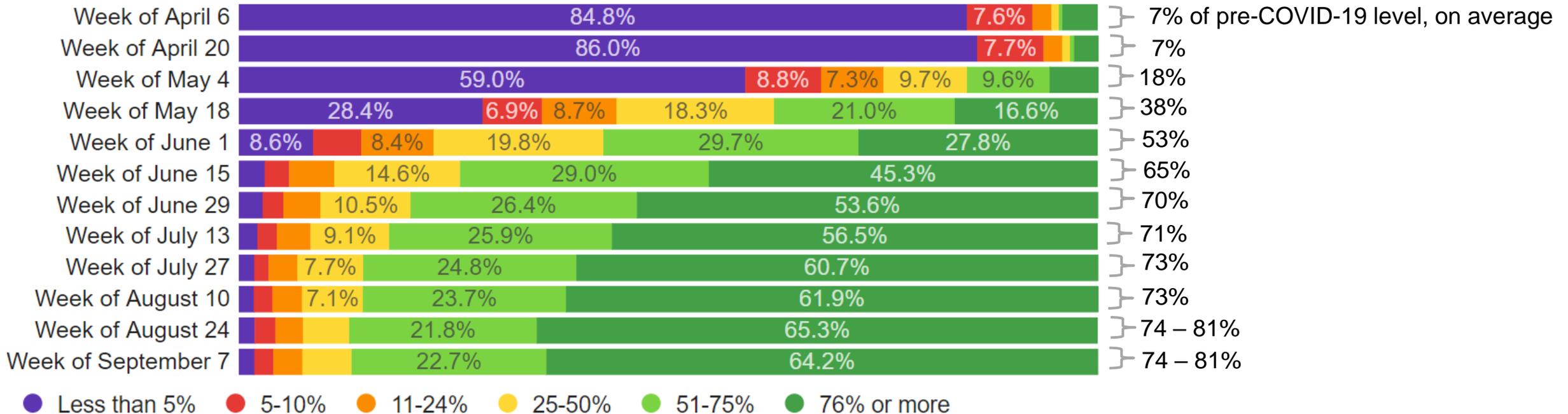
Insight: As of the week of September 7th, nearly 99% of dental practices in the U.S. were open. This has remained largely unchanged over the past month.

DSO-affiliated and group practices are more likely to 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... *

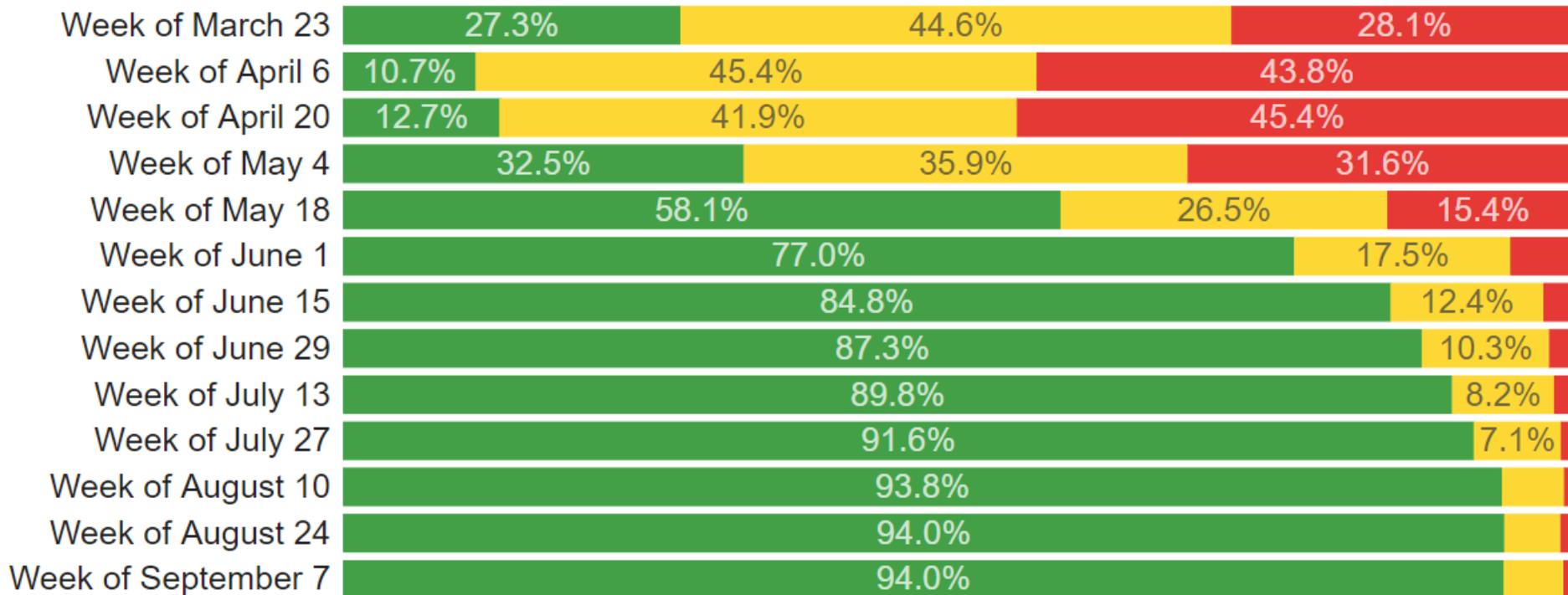
Total Patient Volume



Insight: Nationally, patient volume is leveling off. Patient volume in dental practices is estimated at 74 – 81% of pre-COVID-19 levels as of the week of September 7th.

Core Questions

Is your dental practice paying staff this week?

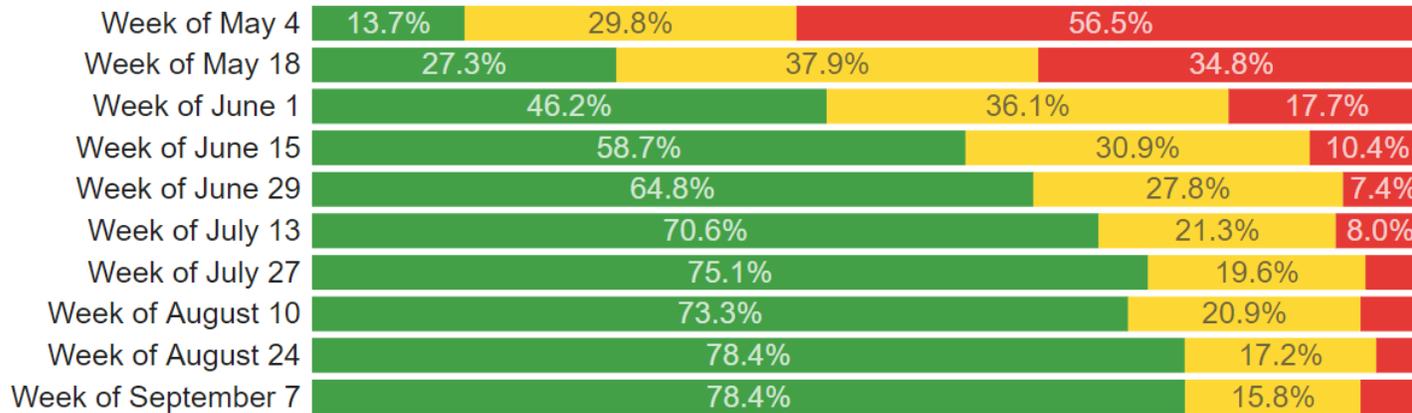


Insight: Staffing in dental practices is stabilizing and is at 94% of pre-COVID-19 levels the week of September 7th.

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

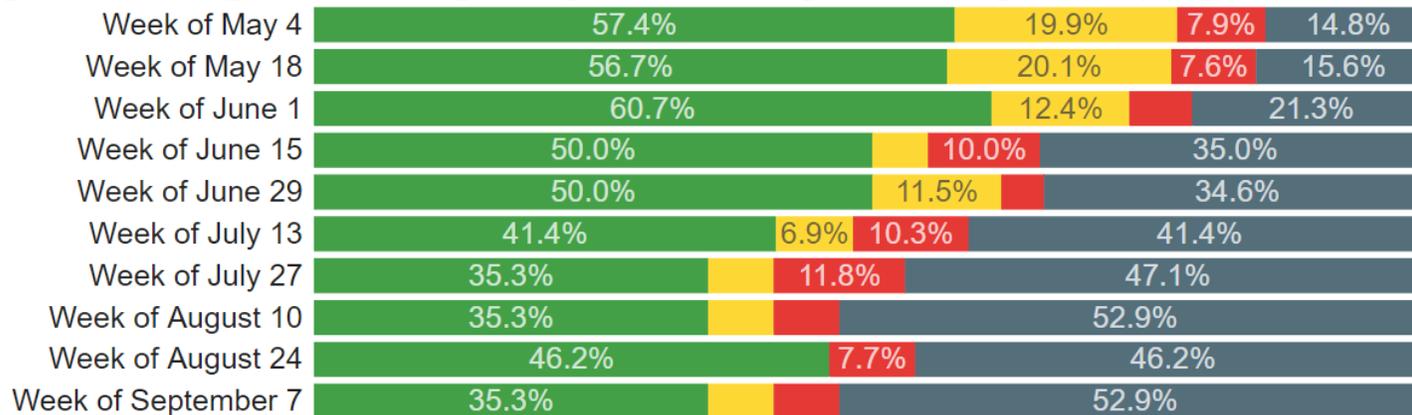
Core Questions

[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?



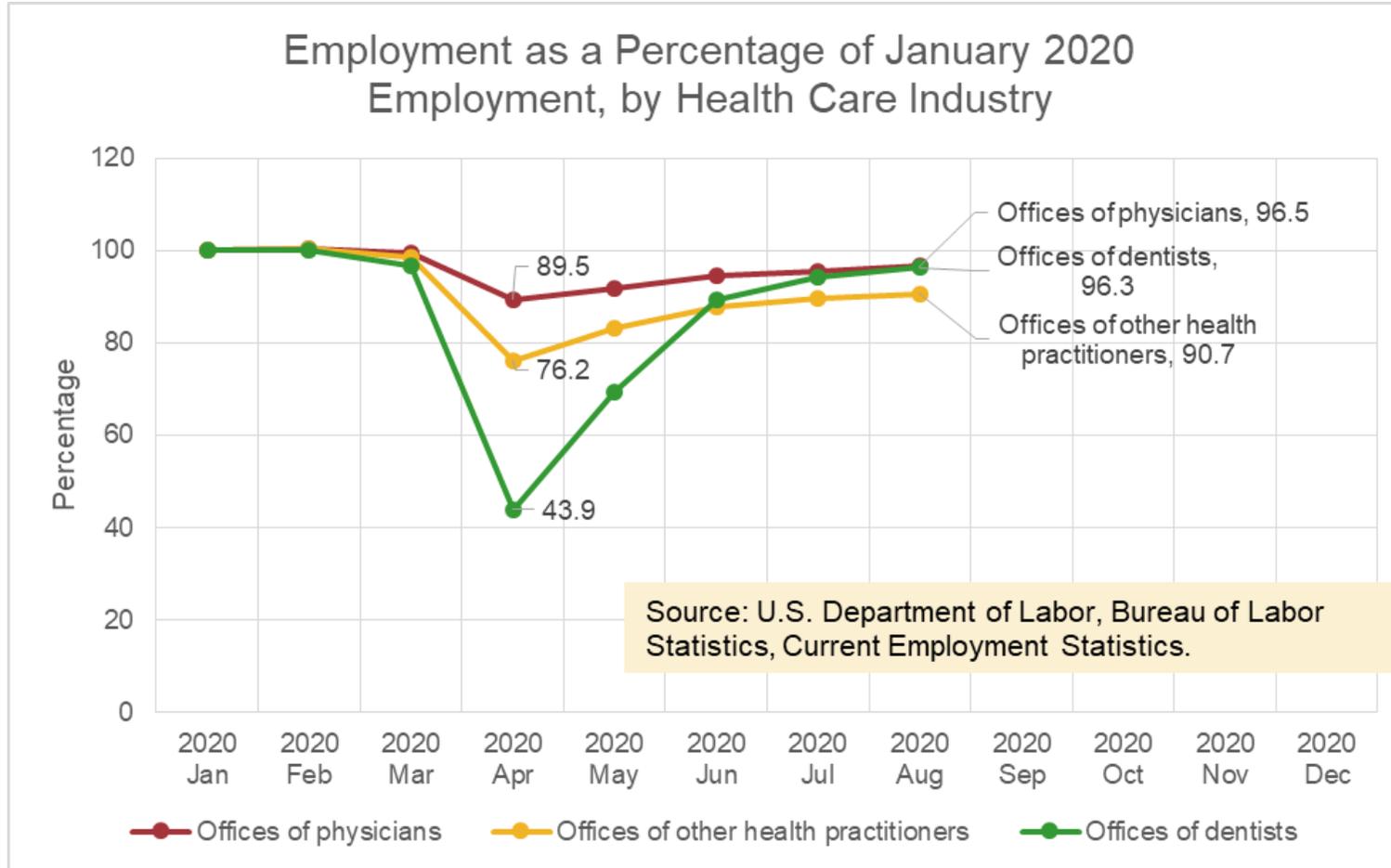
● Yes ● I've applied, but have not received any benefits yet ● No, my application was not approved

● No, I have not applied

Insight: Employee dentists have seen the biggest lingering employment effect. Less than 80% of employee dentists were being paid fully as of the week of September 7th.

For those not being paid at all, about one-third were receiving unemployment benefits.

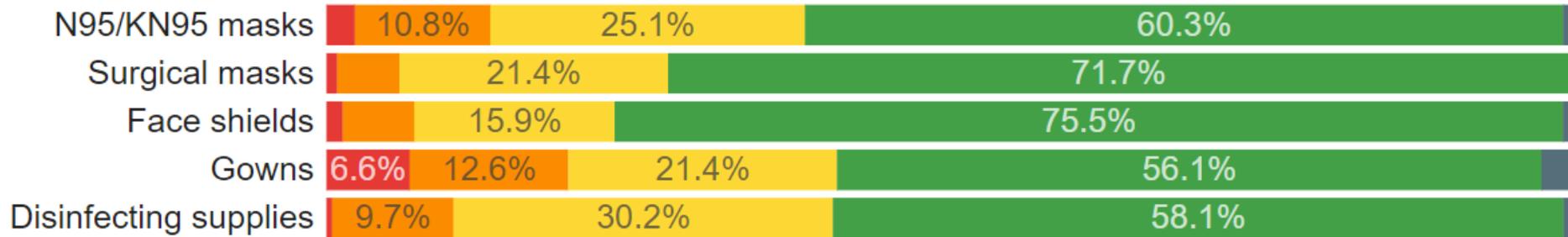
Core Questions



Insight: BLS data show employment in dental offices in August was at 96% of pre-COVID-19 levels, in line with data from HPI's survey.

Core Questions

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

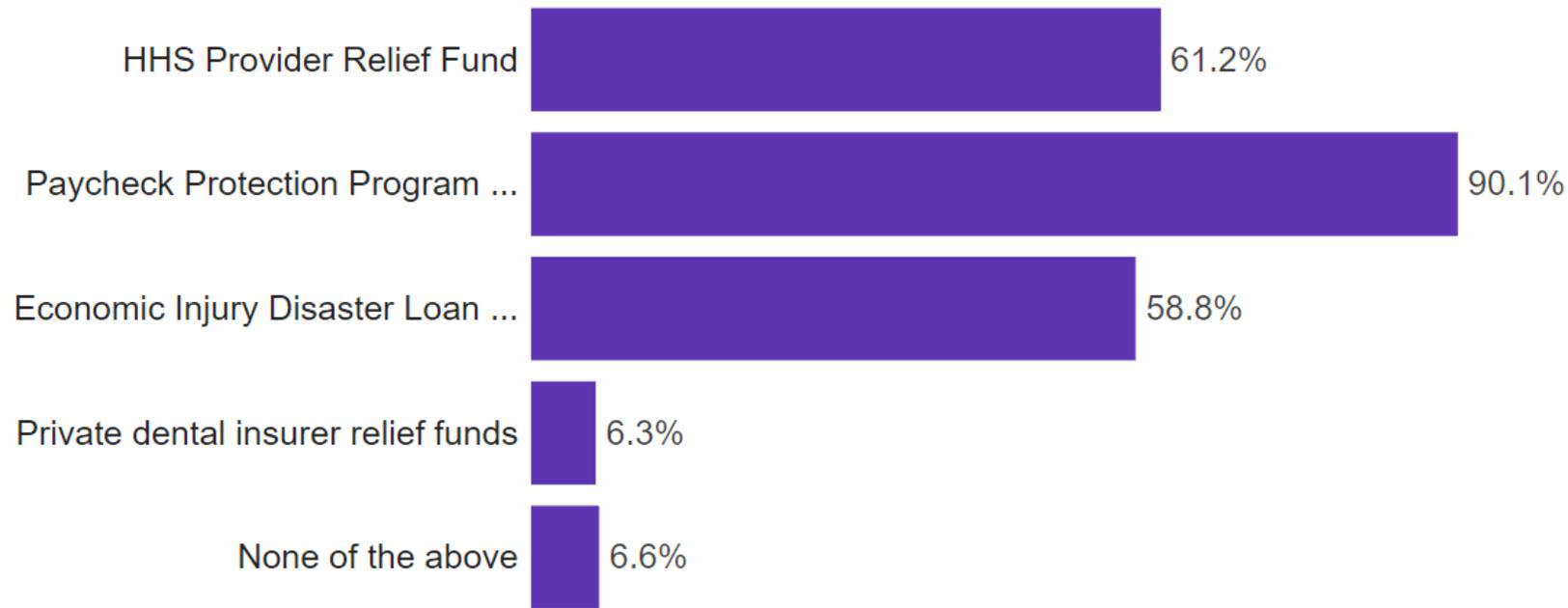


● 0 days ● 1 to 7 days ● 8 to 14 days ● More than 14 days ● Not sure

Insight: PPE availability in dental practices has been stable over the past month. Gowns and N95/KN95 masks remain the biggest issue, as well as disinfecting supplies.

Question of the Week

Have you applied for funds from any of the following relief programs? (Check all that apply.)

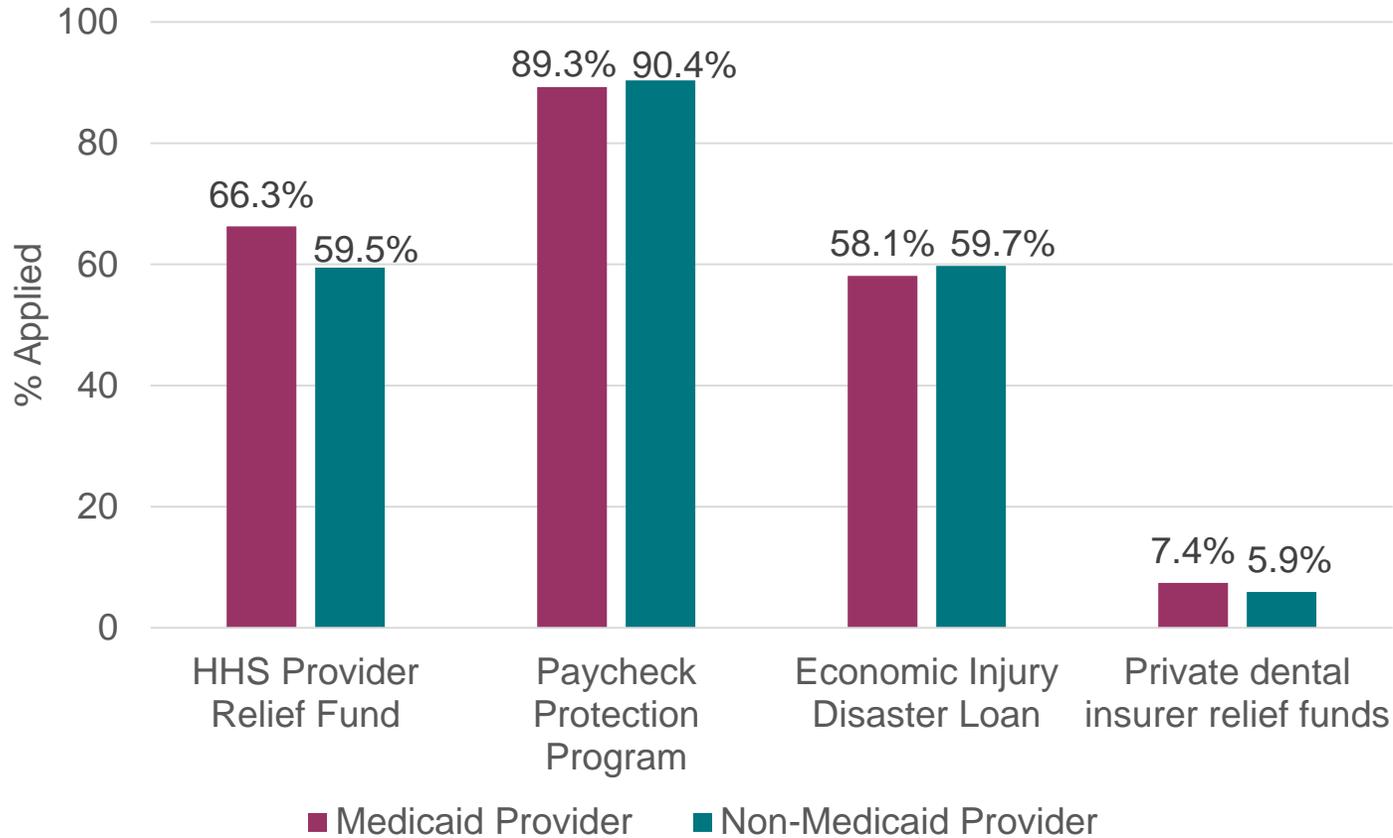


Insight: About 93% of dentists applied for some form of financial relief. The most popular programs have been the PPP, the HHS Provider Relief Fund and the Economic Injury Disaster Loan.

Dentists in solo and small group practices were more likely to apply for these programs than dentists in large group practices.

Questions of the Week

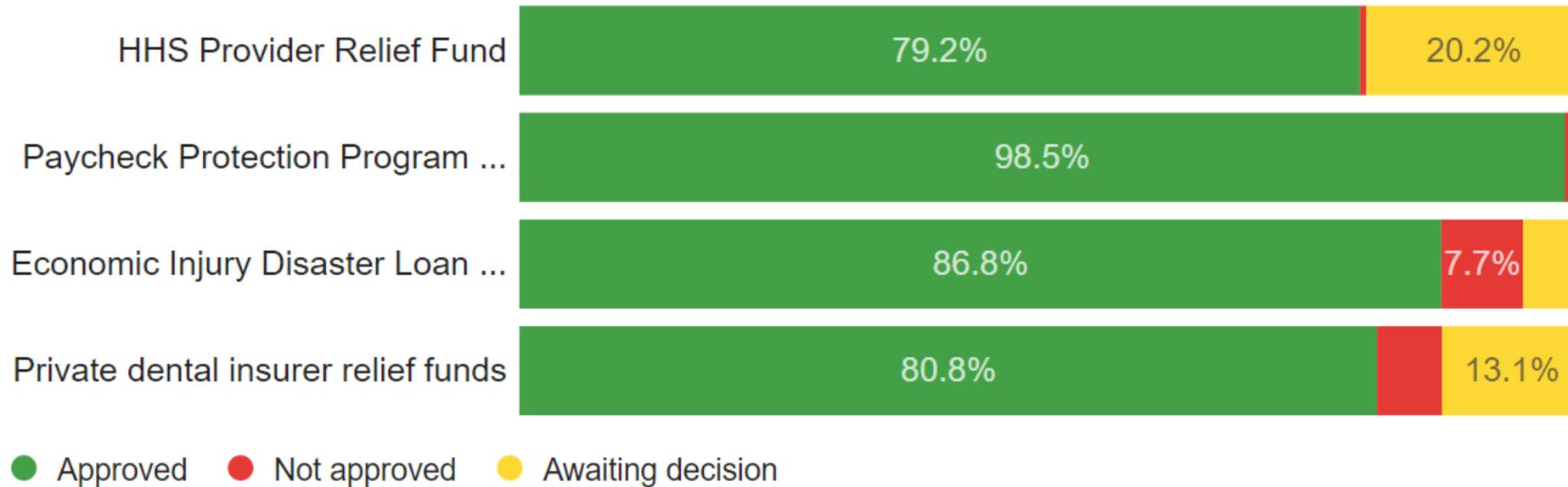
Medicaid Provider and Non-Medicaid Provider Applications for Relief Programs



Insight: Medicaid providers were slightly more likely to apply for the HHS Provider Relief Fund.

Questions of the Week

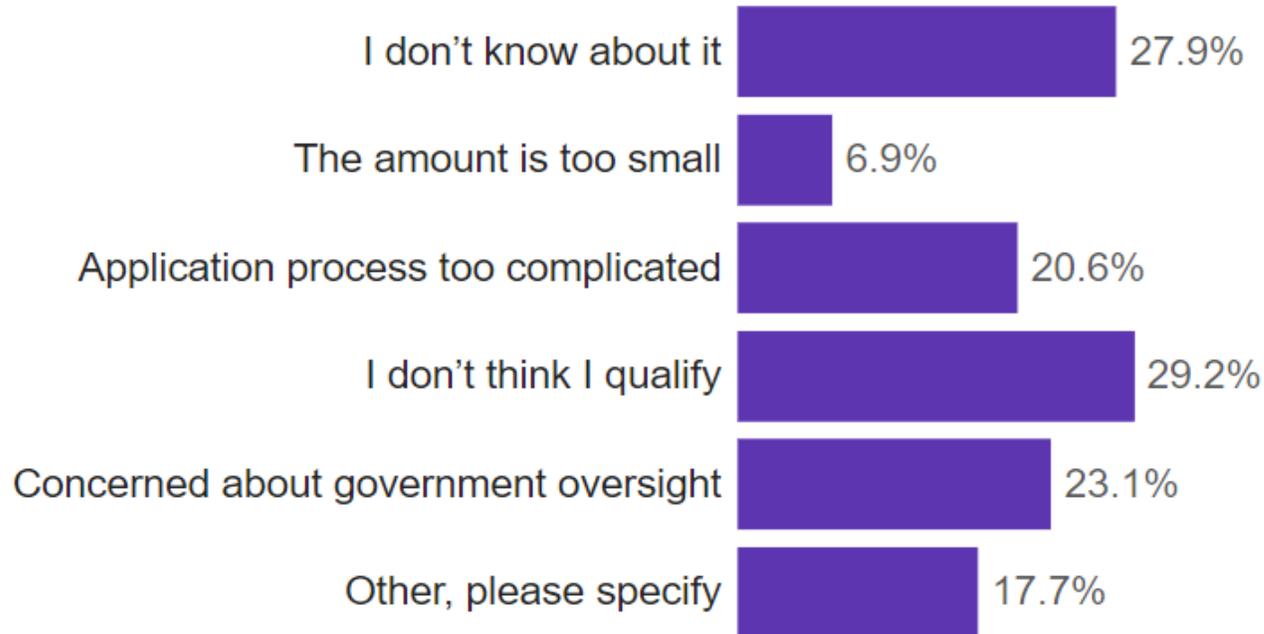
[If applied] What is the current status of your relief program application?



Insight: The majority of applications were approved as of the week of September 7th. Some dentists are awaiting a funding decision from the more recently enacted programs: 20% of applicants for the Provider Relief Fund and 13% of those who applied for private insurer programs.

Questions of the Week

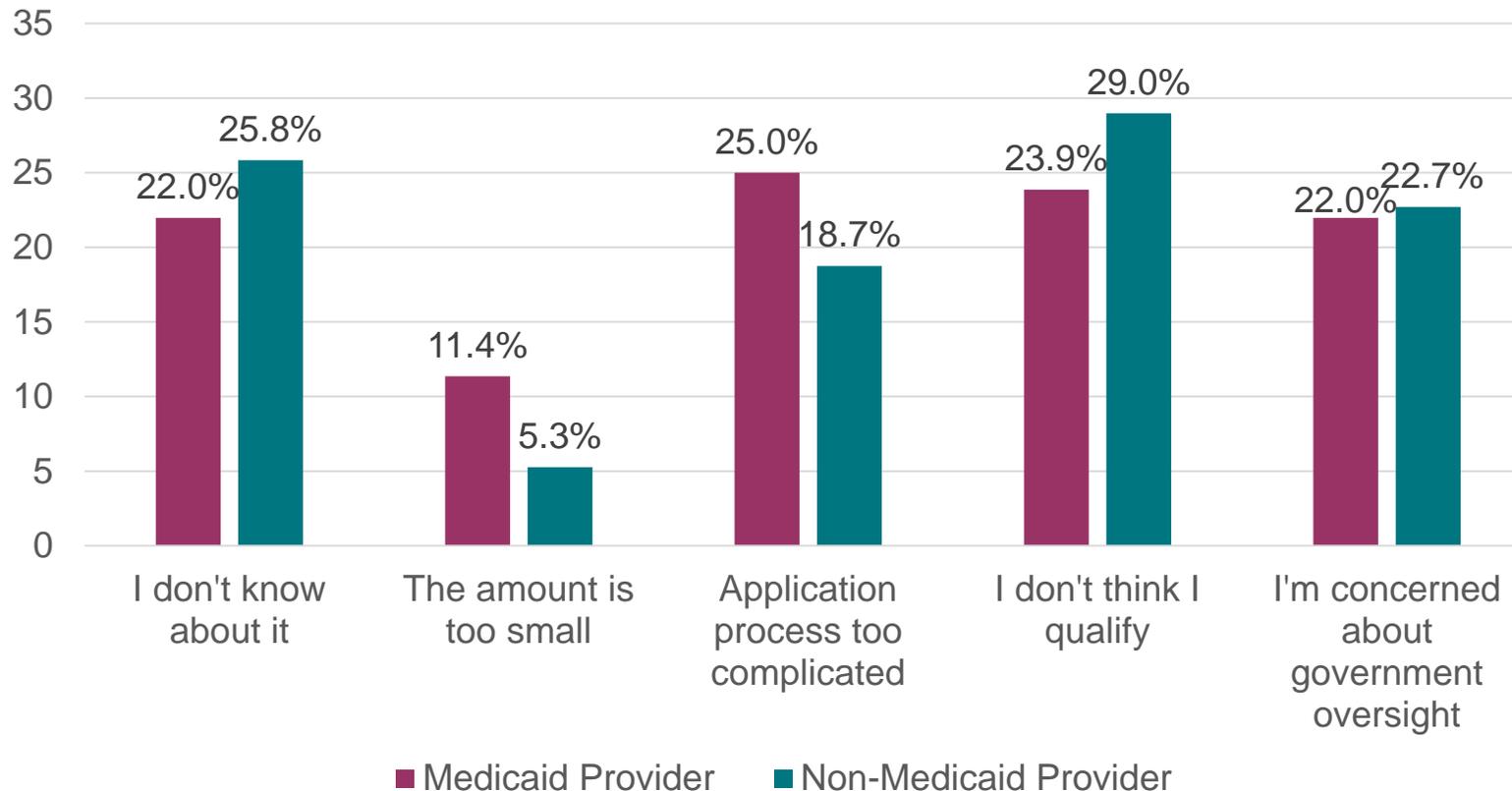
Why have you not applied to the HHS Provider Relief Fund? (Check all that apply.)



Insight: Among dentists who did not apply for the HHS Provider Relief Fund, the most common reasons were that they did not think they qualified or did not know about the program. All practicing dentists are eligible.

Questions of the Week

Medicaid Provider and Non-Medicaid Provider
Reasons for Not Applying for the HHS Provider Relief Fund



Insight: Non-Medicaid providers were more likely to report that they did not know about or thought they did not qualify for the HHS Provider Relief Fund.

Medicaid providers were more likely to indicate that the amount was too small and the application process was too complicated.

Questions of the Week

How important do you think it is to have rapid, point-of-care COVID-19 testing for...

Patients?



Dental team members?



Yourself?



Insight: About two-thirds of dentists think it is extremely or very important to have rapid, point-of-care COVID-19 testing for their team and themselves. The availability of testing for patients in the office was of slightly lesser importance.

● Extremely important ● Very important ● Moderately important ● Slightly important ● Not at all important

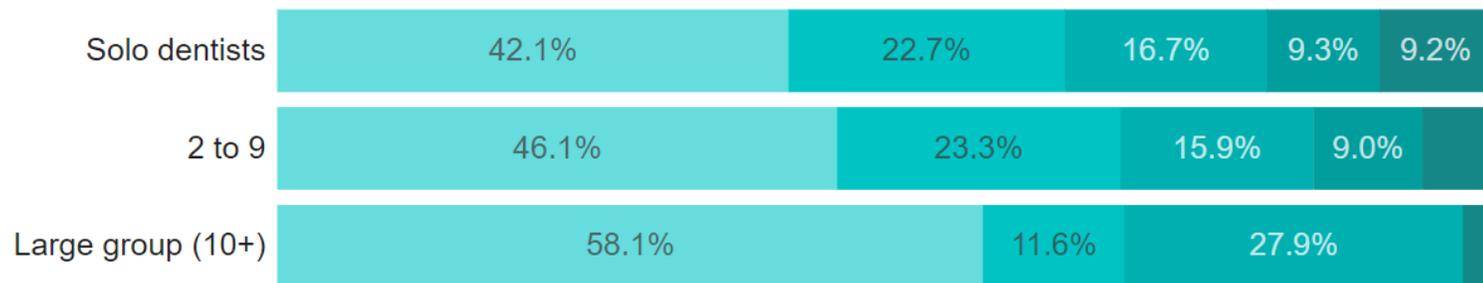
Questions of the Week

How important do you think it is to have rapid, point-of-care COVID-19 testing for...
Dental team members?

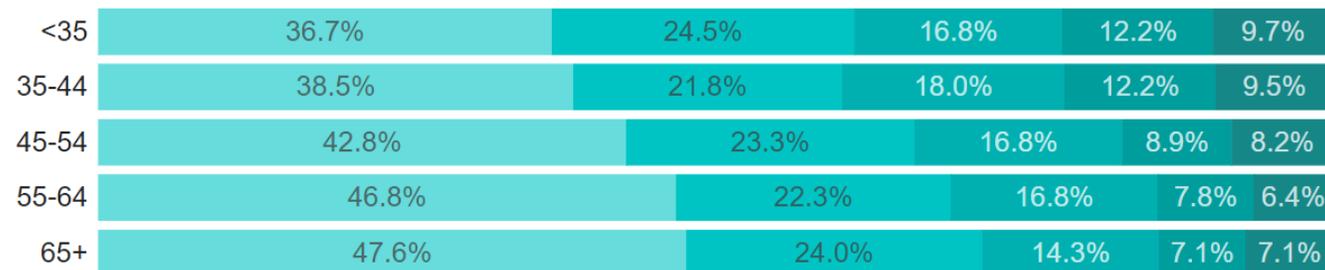
BY DSO AFFILIATION



BY PRACTICE SIZE



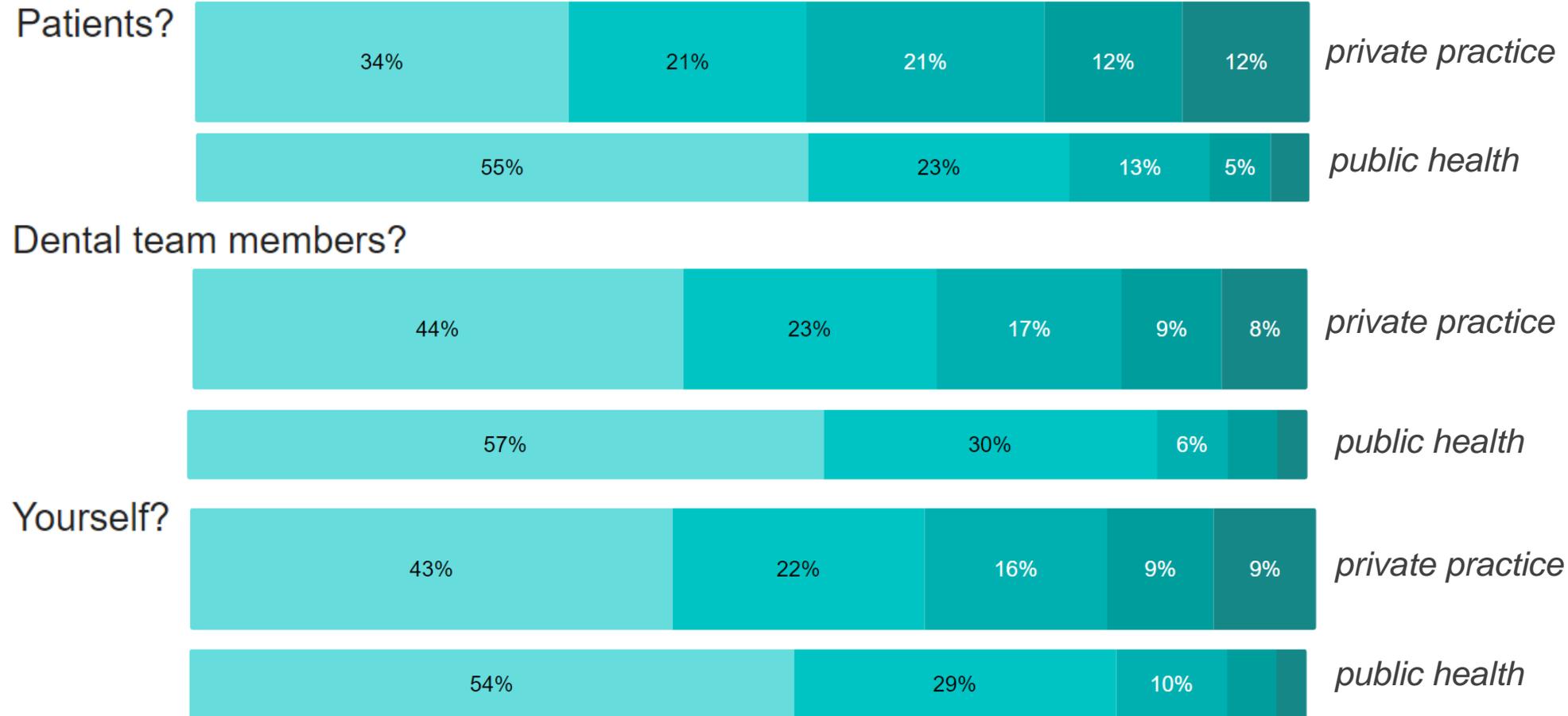
BY AGE GROUP



Insight: Dentists who are affiliated with a DSO, practice in large groups, or are older believe it is more important to have rapid, point-of-care COVID-19 testing available.

Questions of the Week

How important do you think it is to have rapid, point-of-care COVID-19 testing for...



Insight: Dentists in public health settings place higher importance on having testing available compared to those in private practice.

● Extremely important ● Very important ● Moderately important ● Slightly important ● Not at all important

Questions of the Week

Assuming that dentists in your state were permitted to do so, would you be willing to administer COVID-19 vaccines to patients in your office?

ALL RESPONDENTS

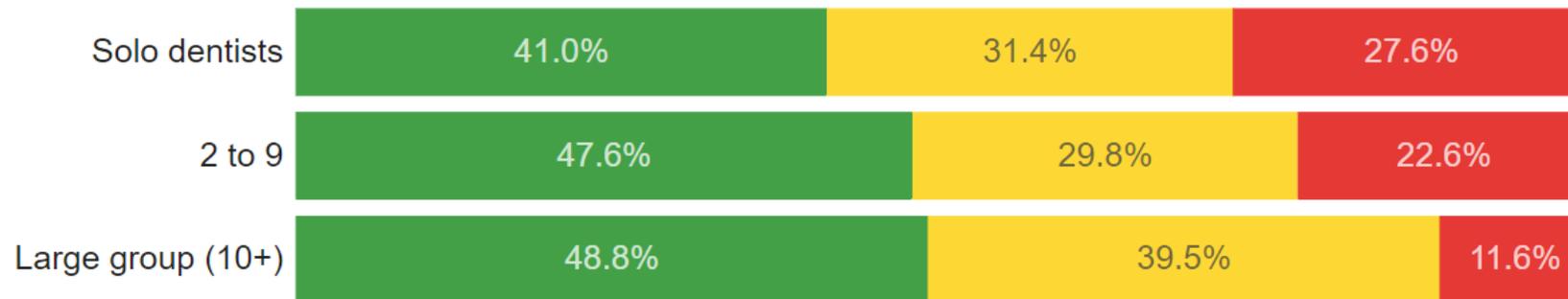


● Yes ● Maybe ● No

BY DSO AFFILIATION



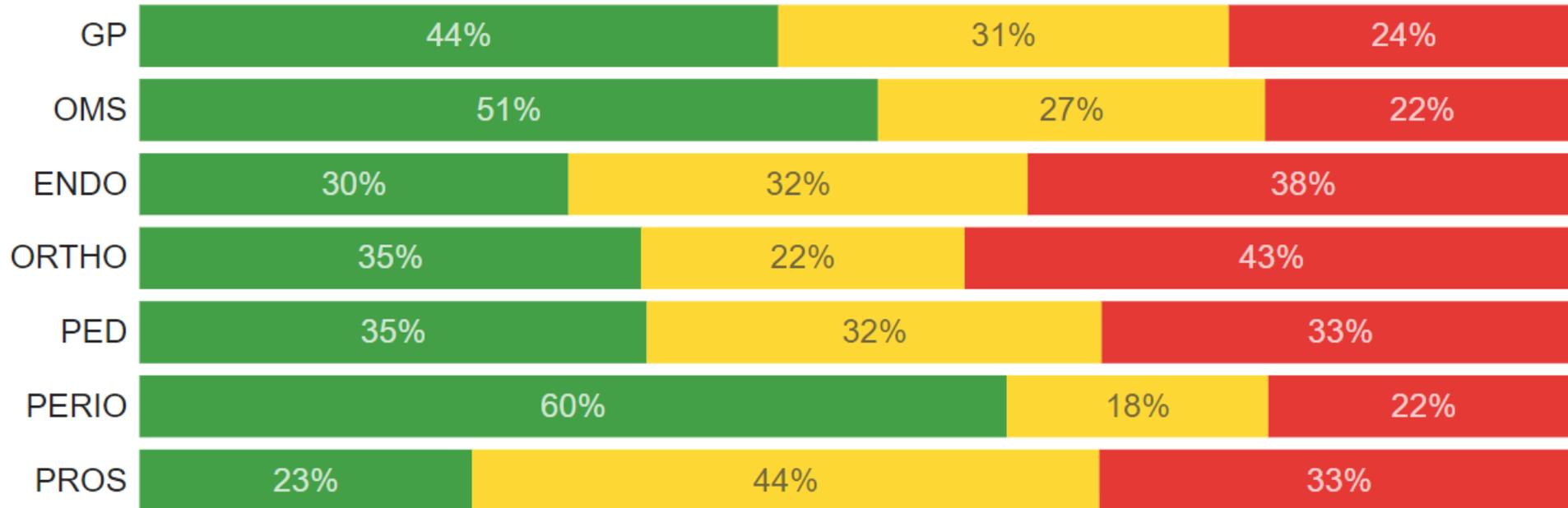
BY PRACTICE SIZE



Insight: Less than half of dentist would be willing to administer COVID-19 vaccines to patients in their offices. Dentists in large group practices were more willing.

Question of the Week

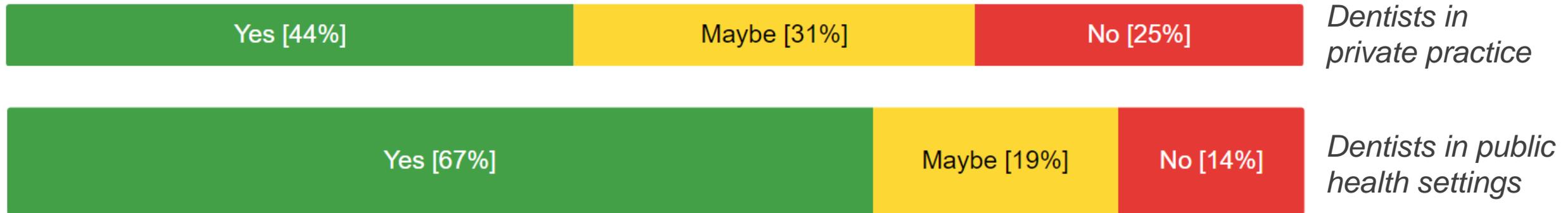
Assuming that dentists in your state were permitted to do so, would you be willing to administer COVID-19 vaccines to patients in your office?



Insight: Periodontists and oral surgeons are the most willing to administer vaccines in their practices. Prosthodontists and endodontists are the least willing.

Question of the Week

Assuming that dentists in your state were permitted to do so, would you be willing to administer COVID-19 vaccines to patients in your office?



Insight: Dentists in public health settings would be more willing to administer vaccines to patients compared to dentists in private practice.

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:

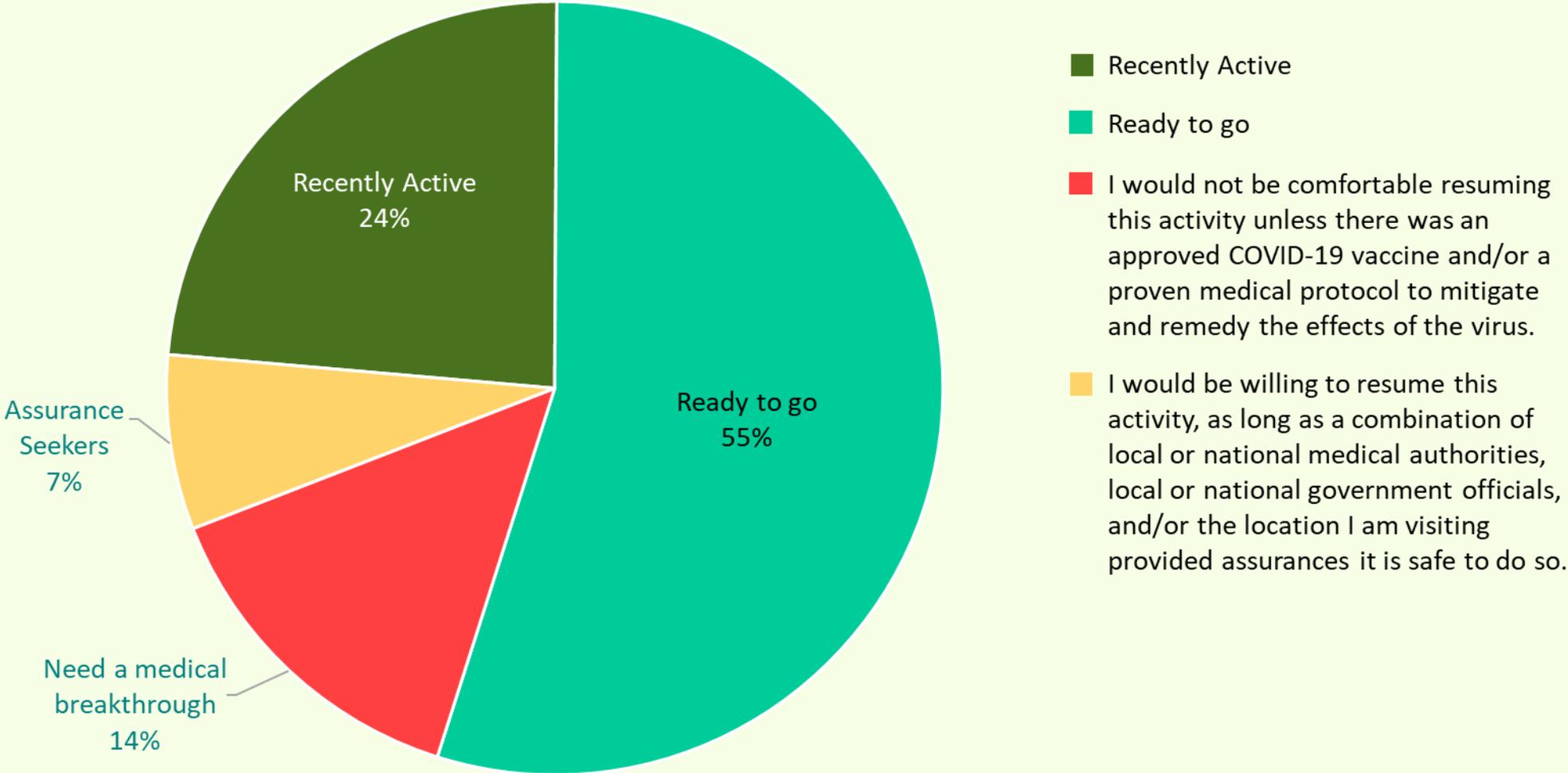
- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**



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

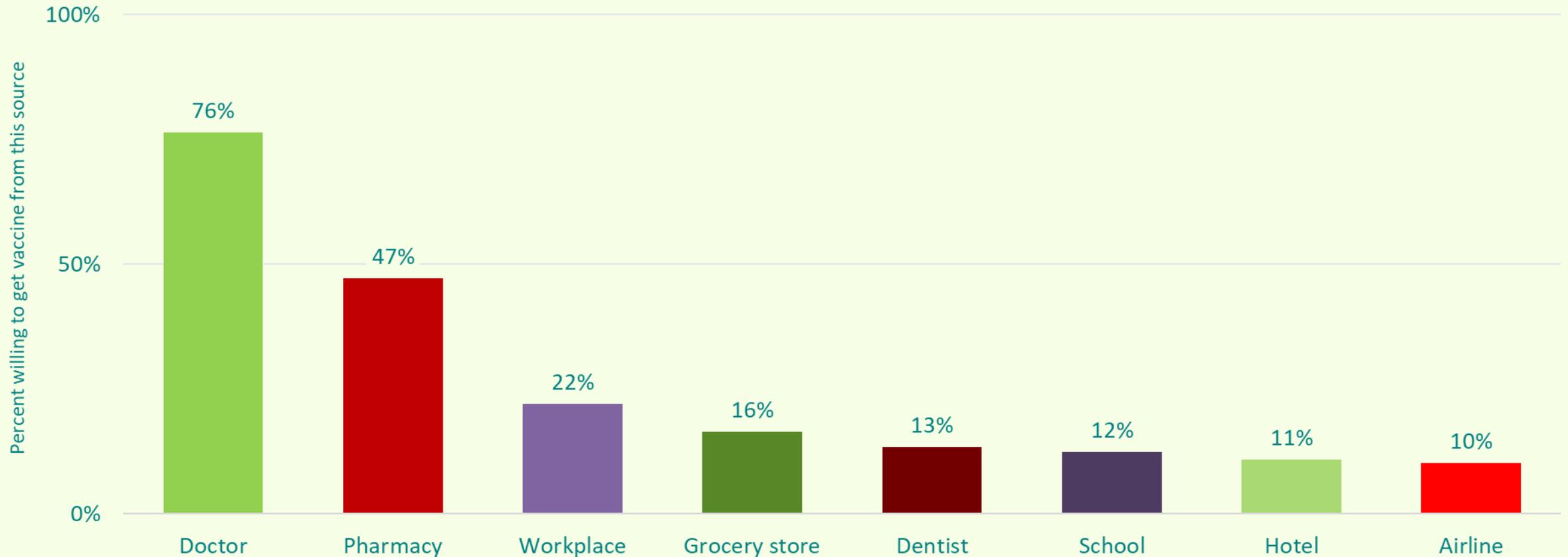
Which of the following conditions is closest to your current point of view... Visit a dentist's office



n=219, Back to Normal Barometer, Sept. 9, 2020

PUBLIC DOES NOT SEE DENTISTS AS ADMINISTERING VACCINES

From which of the following sources would you be willing to get a COVID-19 vaccine once one becomes available?
(Check all that apply)



Key Take-Aways from September 7th Data

- **Recovery:** As of the week of September 7th, 99% of dental offices in the U.S. were open and patient volume was estimated at 74 – 81% of pre-COVID-19 levels. Staffing was at 94% of pre-COVID-19 levels. These values have been roughly unchanged over the past month and suggest we are reaching a “steady state” of economic activity in dental offices.
- **Financial Relief:** Over 90% of dentists have applied for financial relief, most commonly the Paycheck Protection Program, HHS Provider Relief Fund, and Economic Injury Disaster Loan. The vast majority received funds. Among those who did not apply for the HHS Provider Relief Fund, the most common reasons were not knowing about it or believing they were ineligible.
- **Testing:** About two-thirds of dentists think it is important to have rapid, point-of-care COVID-19 testing for their team and themselves. Roughly half believe the same for patients in the office. There is variation by DSO affiliation, practice size, and dentist age. Dentists in public health settings placed more importance on testing than dentists in private practice.
- **Vaccination:** Less than half of dentists polled would be willing to administer COVID-19 vaccines to patients in their offices. About a third would “maybe” consider it, while 25% are unwilling. There was some variation by practice size, with dentists in large group practices more willing. Dentists in public health settings were more willing to administer COVID-19 vaccines than dentists in private practice.
- **Consumer Sentiment:** About 15% of patients will not return to the dentist until a vaccine or proven treatment is available. The public, at least currently, do not rank dental offices high as locations they would be willing to get a COVID-19 vaccine.

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Thank You!



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