

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

Insights from Data for the Week of September 21<sup>st</sup>

# Today



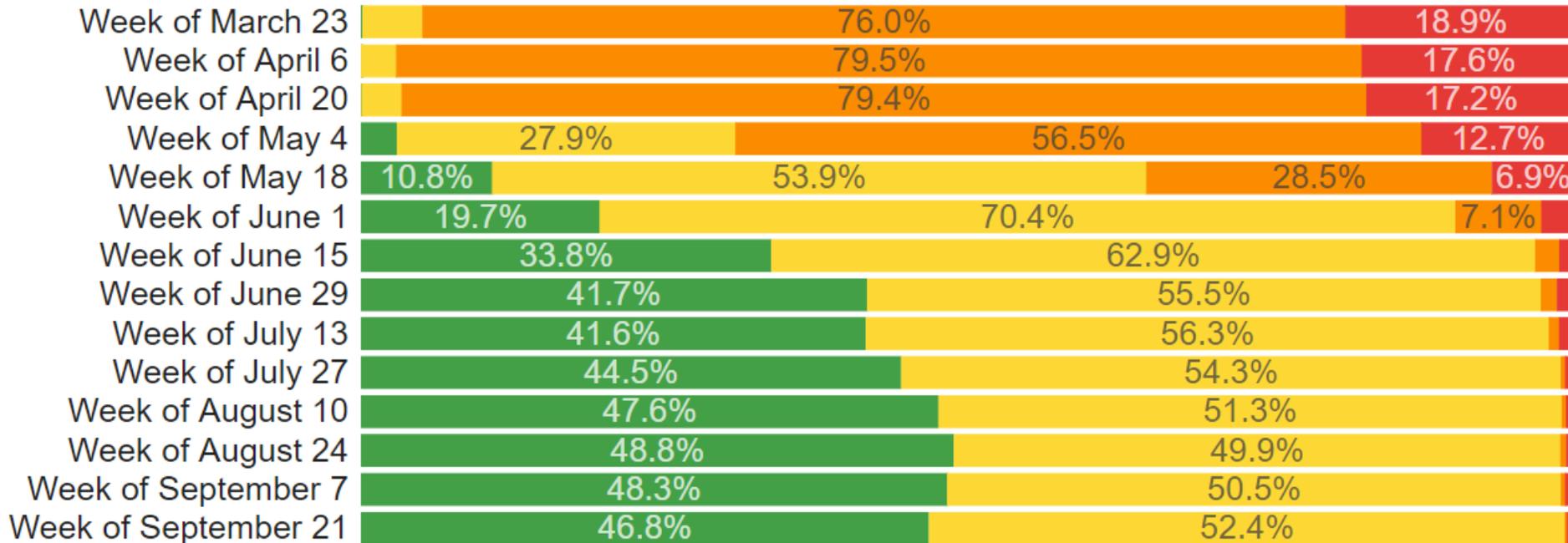
1. *Update on the latest data from HPI economic impact of COVID-19 tracking poll.*
2. *'Question of the Week' data focusing on changes in the prevalence of stress-related oral health conditions and measures dentists are taking to maintain financial solvency.*
3. *The latest consumer sentiment data related to dental visits.*

# HPI Impact of COVID-19 Tracking Poll

- Bi-weekly poll beginning March 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 4,000 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?



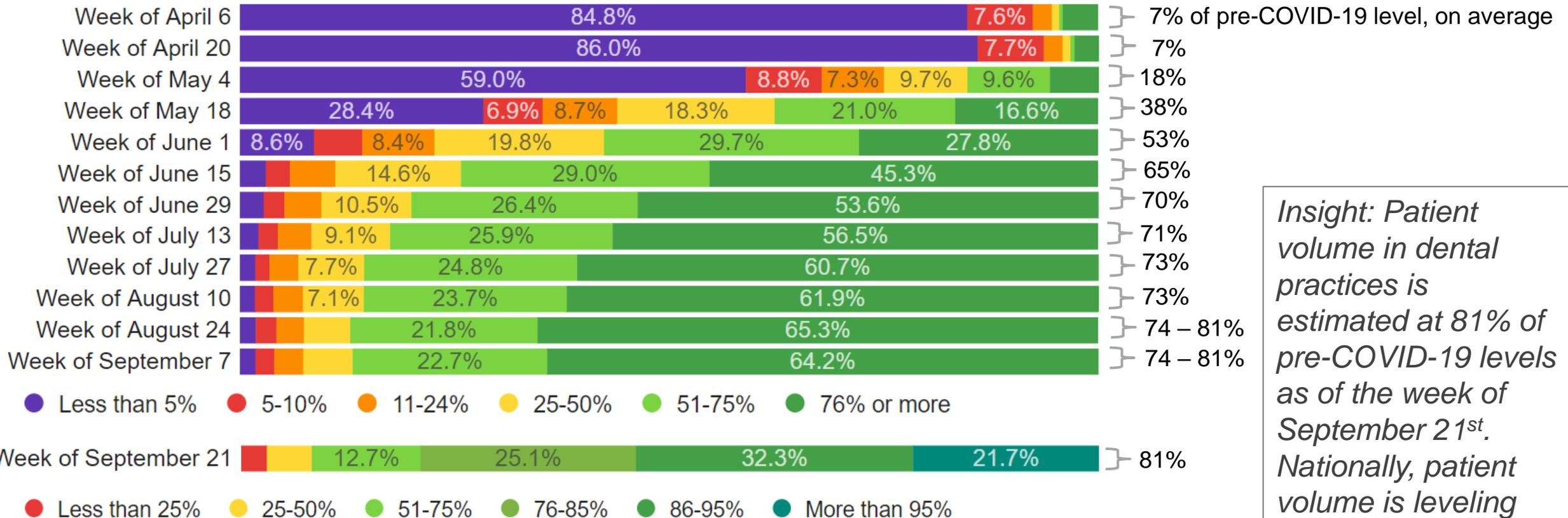
*Insight: As of the week of September 21<sup>st</sup>, nearly 99% of dental practices in the U.S. were open. Roughly half of open practices were reporting “business as usual” in terms of patient volume. This has remained largely unchanged over the past 3 months.*

- 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... \*

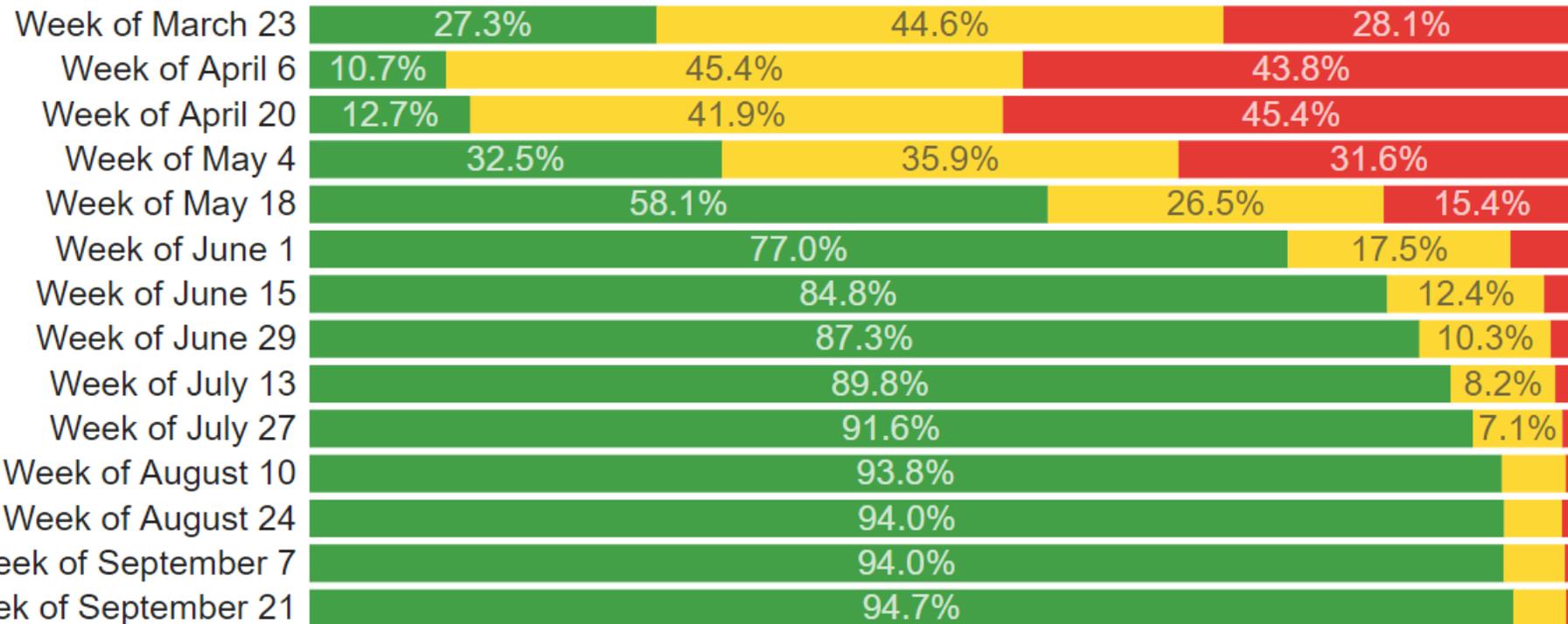
## Total Patient Volume



*Insight: Patient volume in dental practices is estimated at 81% of pre-COVID-19 levels as of the week of September 21<sup>st</sup>. Nationally, patient volume is leveling off.*

# Core Questions

## Is your dental practice paying staff this week?

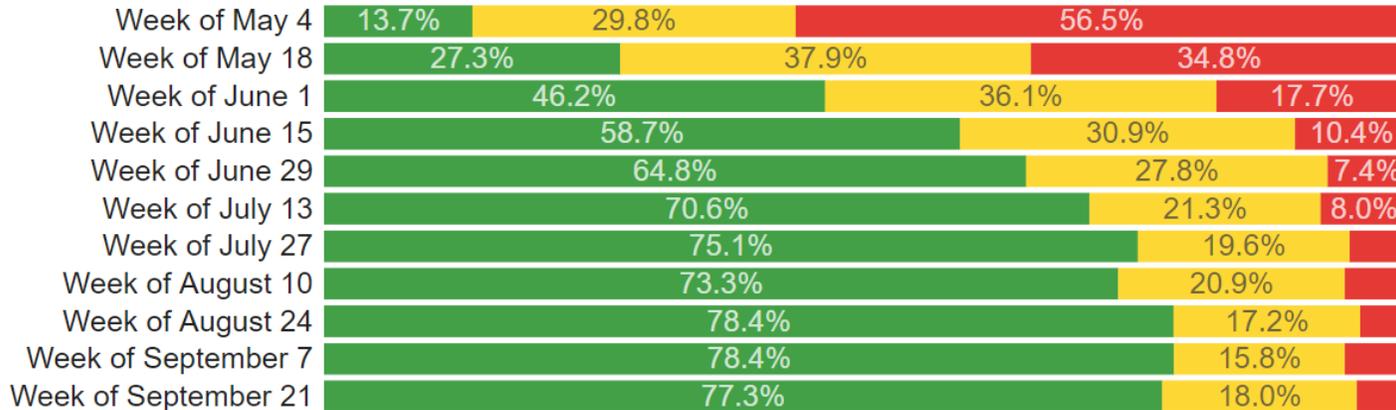


*Insight: Staffing in dental practices is stabilizing and was at 95% of pre-COVID-19 levels the week of September 21<sup>st</sup>.*

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

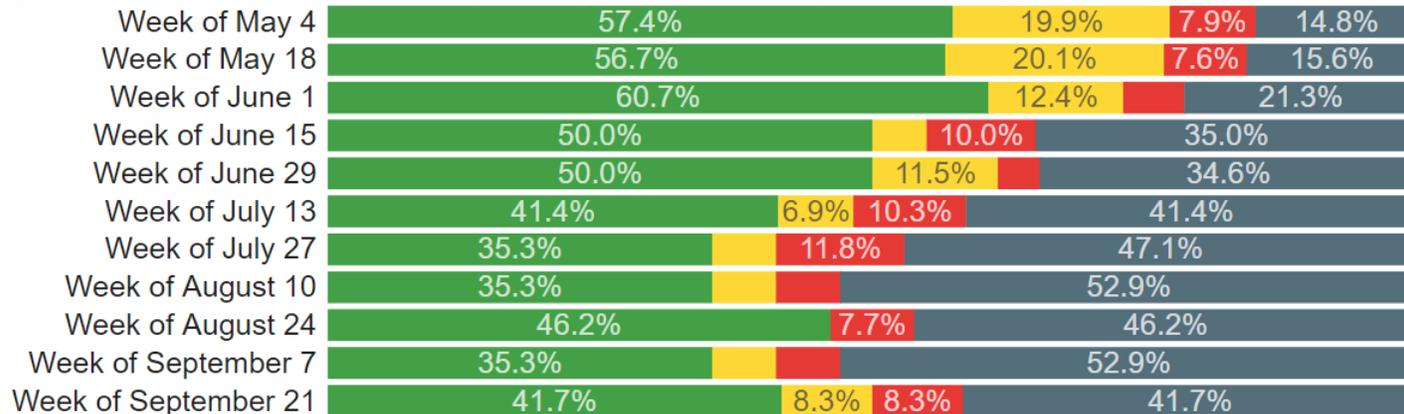
# Core Questions

## **[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?**



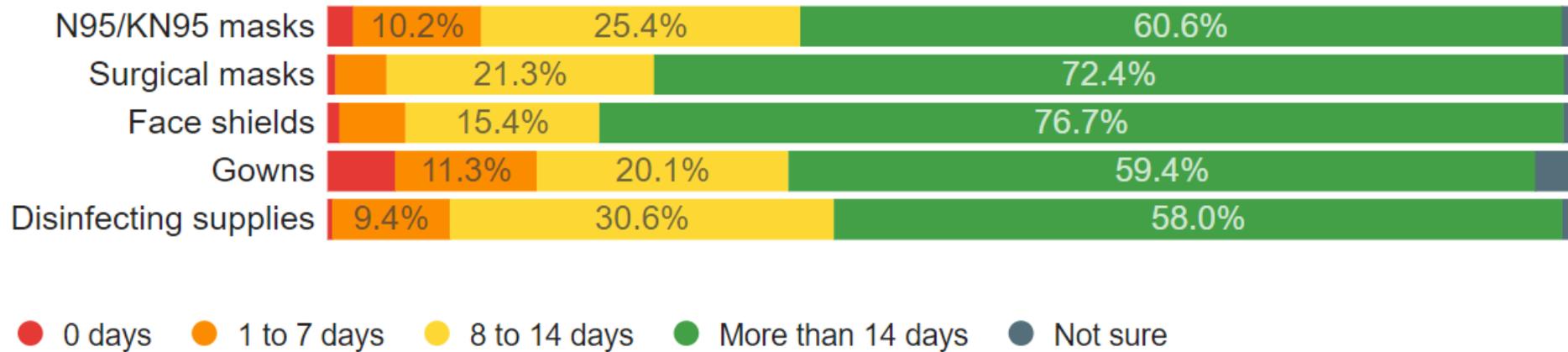
● Yes ● I've applied, but have not received any benefits yet ● No, my application was not approved  
● No, I have not applied

*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 21<sup>st</sup>.*

*For those not being paid at all, roughly 40% were receiving unemployment benefits.*

# Core Questions

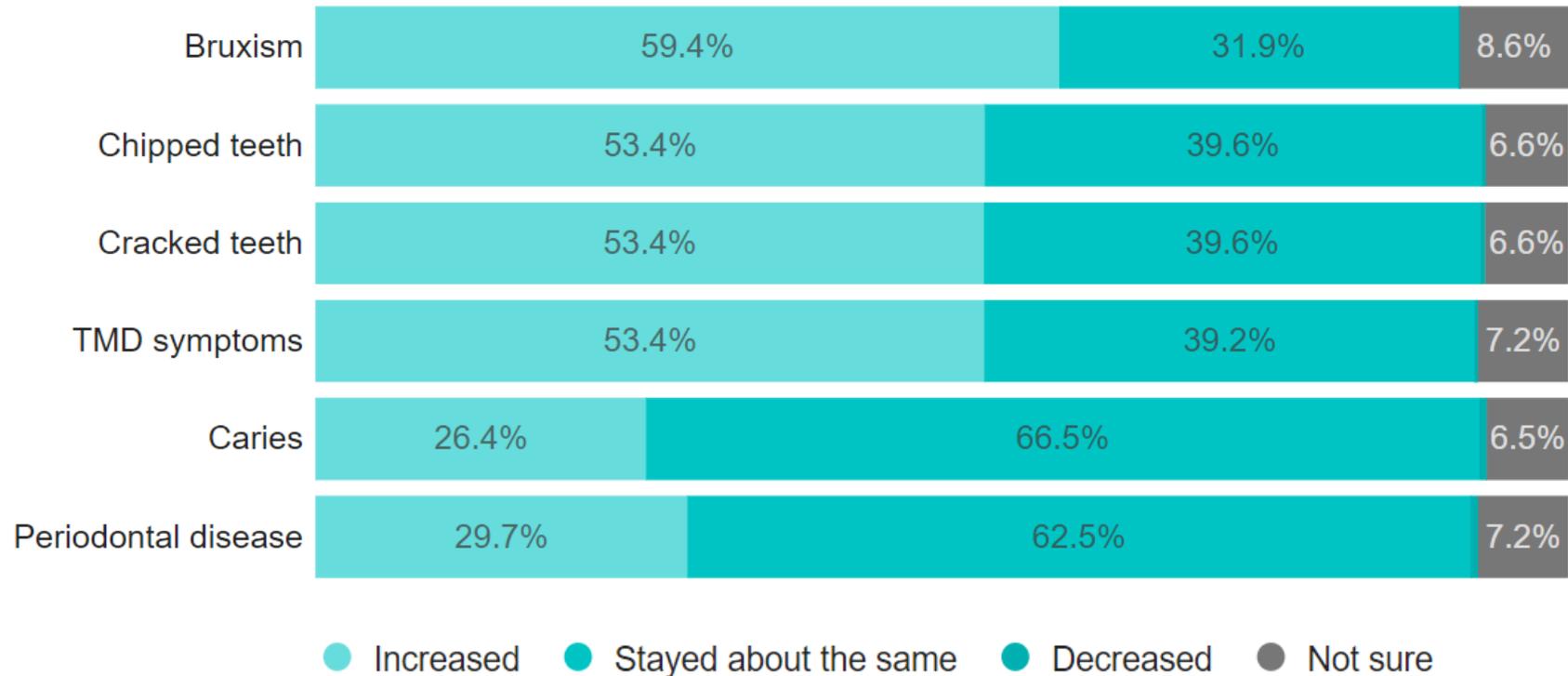
How many days' worth of the following PPE does your practice have at this time?



*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.*

# Question of the Week

Compared to before the COVID-19 pandemic, how has the prevalence of the following conditions changed among patients in your dental practice? (continued)

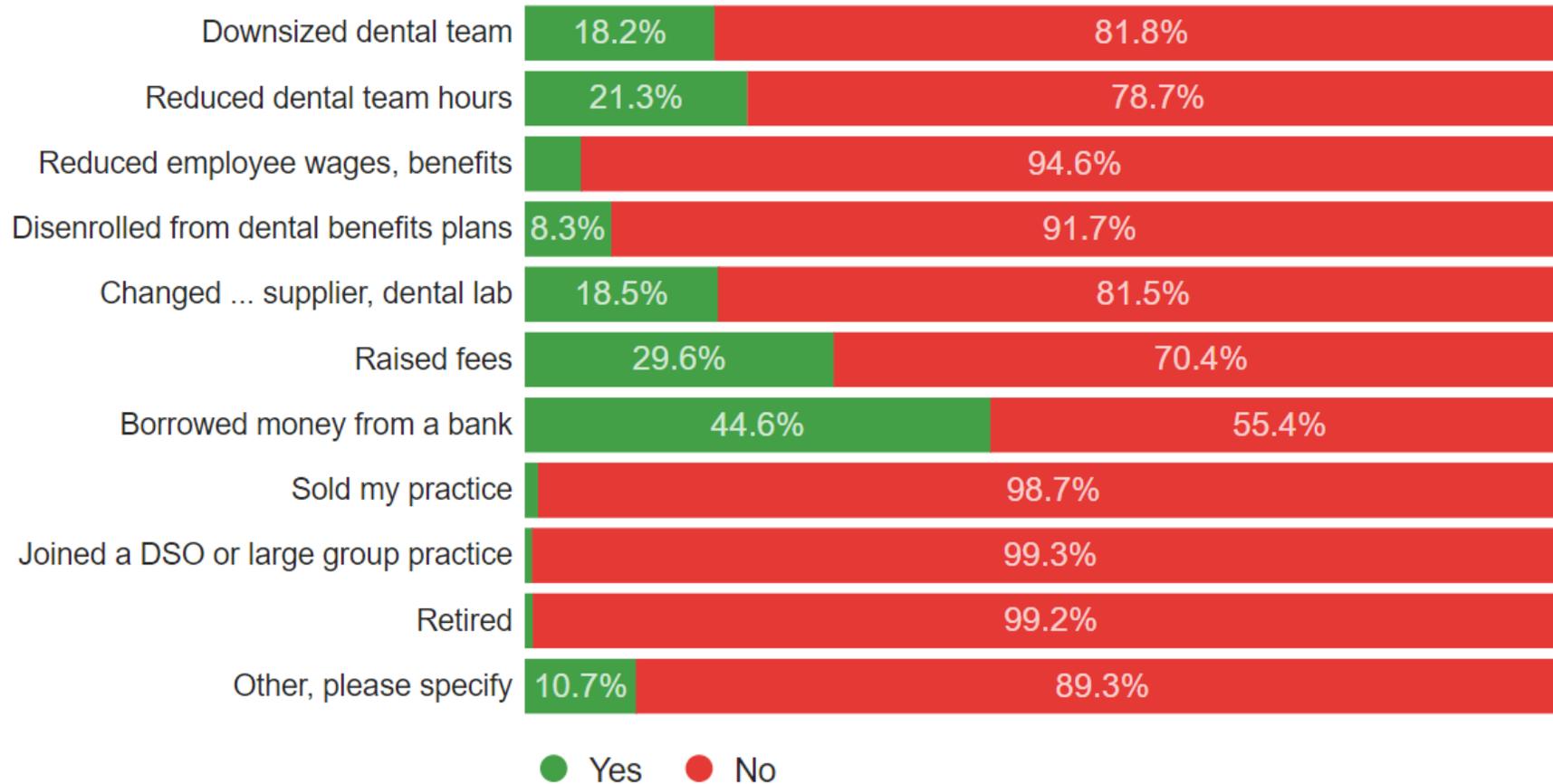


*Insight: The majority of dentists have seen increases in stress-related oral health conditions since the onset of the pandemic. These include bruxism, chipped and cracked teeth, and TMD symptoms.*

*More than a quarter of dentists have also seen increases in caries and periodontal disease among the patients in their practices.*

# Question of the Week

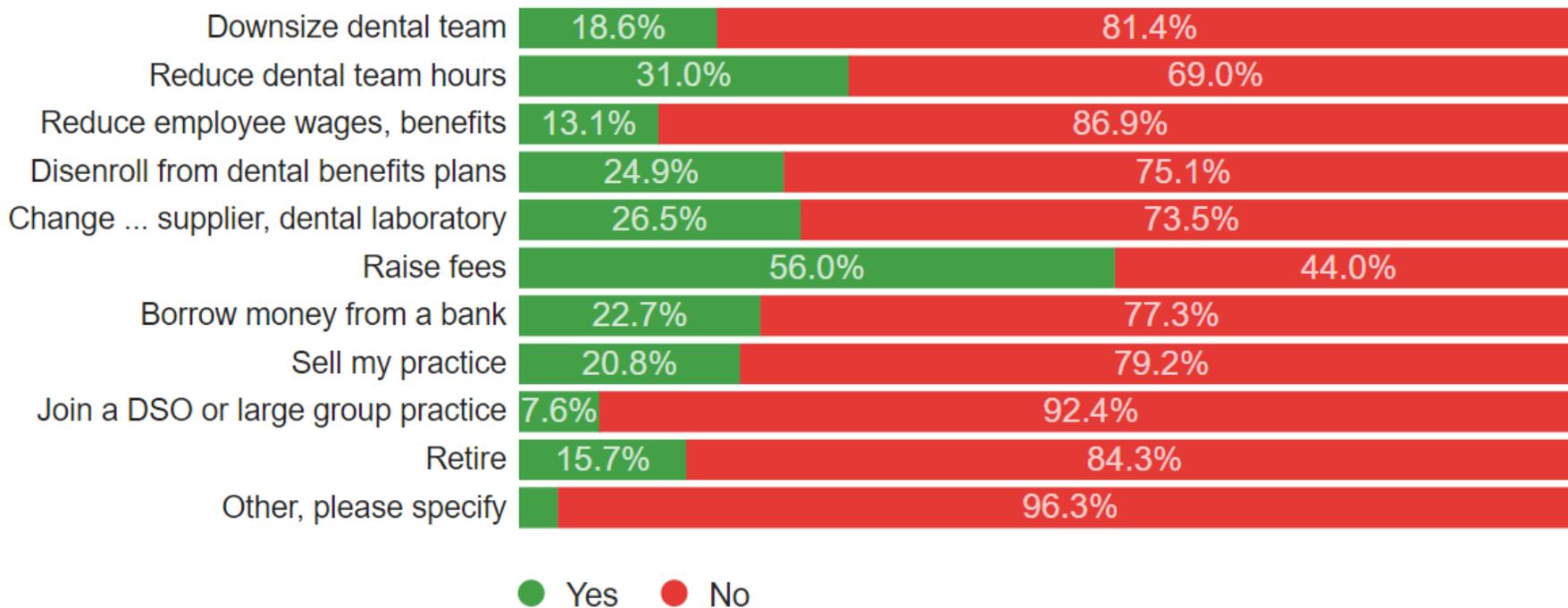
Since you reopened, have you taken any of the following measures to maintain the financial stability of your practice?



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

# Question of the Week

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

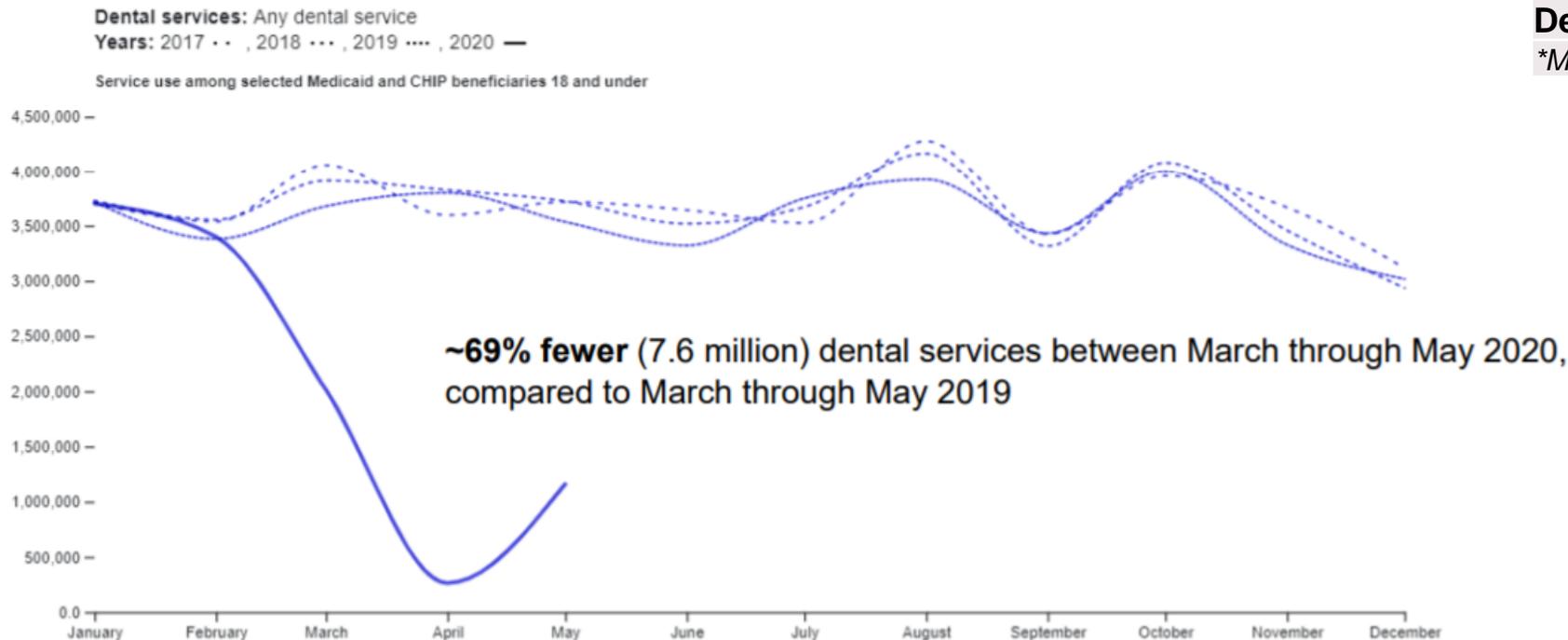


*Insight: If patient volume does not rebound further, dentists are likely to raise fees and reduce their dental team's hours. About 1 in 5 are likely to sell their practice, including about 1 in 6 who are likely to retire. About 40% of dentists 65 and older indicated they would retire.*

# CMS Preliminary Medicaid & CHIP Data Snapshot

## Preliminary data show the number of dental services for children declined through April, started to rise in May, but are still substantially lower than prior years' rates

Dental service rates among children dropped from nearly 100 services per 1,000 beneficiaries to a low of 7 services per 1,000 beneficiaries in April, back up to 31 screens per 1,000 beneficiaries in May.



Service	Decline*
Vaccinations	22%
Screening Services	44%
Mental Health (O/P) Services	44%
<b>Dental Services</b>	<b>69%</b>

\*March-May 2020 compared to March-May 2019

*Insight: Primary, preventive, and mental health services declined among children during the pandemic. Dental services declined 69%, a more significant drop than vaccinations, screenings, or mental health services.*

CMS: Service use among Medicaid & CHIP beneficiaries age 18 and under during COVID 19. September 23, 2020.  
<https://www.medicaid.gov/resources-for-states/downloads/medicaid-chip-beneficiaries-18-under-COVID-19-snapshot-data.pdf>

# 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:

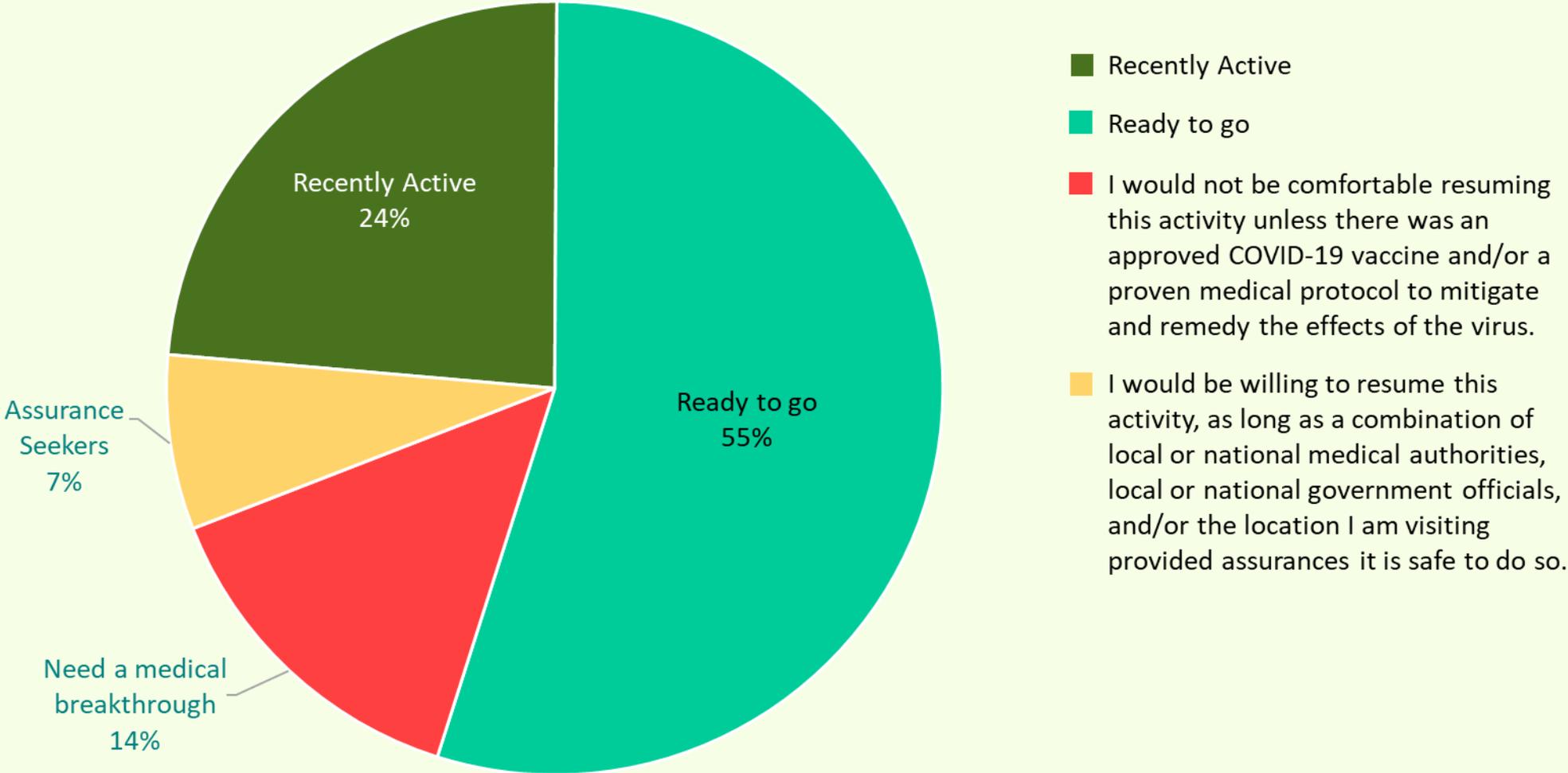
- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**

*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



# Key Take-Aways from September 21<sup>st</sup> Data

- **Recovery:** As of the week of September 21<sup>st</sup>, 99% of dental offices in the U.S. were open and patient volume was estimated at 81% of pre-COVID-19 levels. Staffing was at 95% 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.
- **Oral Health Issues:** The majority of dentists have seen increases among their patients in stress-related oral health conditions since the onset of the pandemic, including bruxism, chipped and cracked teeth, and TMD symptoms. More than a quarter of dentists have also seen increases in caries and periodontal disease among the patients in their practices.
- **Public perception:** Consumer polling consistently shows about 80% of people who regularly visited the dentist prior to the pandemic are comfortable visiting the dentist today. About 7% would be comfortable with additional assurances from agencies like the CDC and the ADA. However, 14% say they will not return to the dentists until there is a vaccine or proven COVID-19 treatment.
- **Measures Taken for Financial Sustainability:** Dentists have taken various measures to maintain the financial stability of their practices, including borrowing from a bank, raising fees, reduced their dental team hours or downsized their dental team. A much smaller share have changed suppliers or labs or disenrolled from dental benefits plans.
- **Future Financial Sustainability Considerations:** If patient volume does not increase by the end of the year, many dentists will consider taking additional measures to maintain financial sustainability. The most common response would be to raise fees, with over half considering this option. About one-third would reduce their dental team hours. A quarter would consider changing their supplier or lab or disenrolling from dental benefits plans. About 20% would consider selling their practice and about 8% would consider joining a DSO or large group practice. Given that patient volume is unlikely to change considerably in the coming months, we are likely to see many of these measures play out.

# Thank You!



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