A Special Webinar from the ADA

How COVID-19 is Impacting Dental Practices and Patient Attitudes Toward Visiting the Dentist

August 5, 2020

HPI Health Policy Institute
ADA American Dental Association
HPI Economic Impact of COVID-19 Tracking Poll

• Bi-weekly poll beginning March 23.

• Core measures: Status of your practice, volume of patients and collections, status of dental practice staff.

• “Question(s) of the Week”.

• Sent to dentists in private practice who agreed to be part of ongoing panel.

• Nationally representative sample of about 4,000 dentists. State level data available for many states.

• Links to reports and interactive data dashboard available at www.ada.org/virus.
### What is the current status of your dental practice?

**Insight:** As of week of July 13, 99% of dental practices in the U.S. were open. This was about the same as two weeks prior.

<table>
<thead>
<tr>
<th>Week</th>
<th>Open and business as usual</th>
<th>Open but lower patient volume than usual</th>
<th>Closed but seeing emergency patients only</th>
<th>Closed and not seeing any patients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week of March 23</td>
<td>76.0%</td>
<td>18.9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week of April 6</td>
<td>79.5%</td>
<td>17.6%</td>
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<tr>
<td>Week of April 20</td>
<td>79.4%</td>
<td>17.2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week of May 4</td>
<td>27.9%</td>
<td>56.5%</td>
<td>12.7%</td>
<td></td>
</tr>
<tr>
<td>Week of May 18</td>
<td>10.8%</td>
<td>53.9%</td>
<td>28.5%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Week of June 1</td>
<td>19.7%</td>
<td>70.4%</td>
<td>6.9%</td>
<td></td>
</tr>
<tr>
<td>Week of June 15</td>
<td>33.8%</td>
<td>62.9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week of June 29</td>
<td>41.7%</td>
<td>55.5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week of July 13</td>
<td>41.6%</td>
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<td></td>
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</tr>
</tbody>
</table>
### Core Questions

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

#### Total Patient Volume

<table>
<thead>
<tr>
<th>Week of April 6</th>
<th>Week of April 20</th>
<th>Week of May 4</th>
<th>Week of May 18</th>
<th>Week of June 1</th>
<th>Week of June 15</th>
<th>Week of June 29</th>
<th>Week of July 13</th>
<th>Week of July 27</th>
</tr>
</thead>
<tbody>
<tr>
<td>84.8%</td>
<td>86.0%</td>
<td>59.0%</td>
<td>28.4%</td>
<td>8.6%</td>
<td>14.6%</td>
<td>10.5%</td>
<td>9.1%</td>
<td>7.7%</td>
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<tr>
<td>7.6%</td>
<td>7.7%</td>
<td></td>
<td>6.9%</td>
<td>8.8%</td>
<td>6.4%</td>
<td>29.7%</td>
<td>25.9%</td>
<td>24.8%</td>
</tr>
</tbody>
</table>

- 7% of pre-COVID-19 level, on average
- 7%
- 18%
- 38%
- 53%
- 65%
- 70%
- 71%
- 73%

**Insight:** Nationally, patient volume is leveling off. Patient volume was estimated to be 73% of pre-COVID-19 levels for the week of July 27.
Core Questions

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

Total Patient Volume

- **GP**: 7.7% Less than 5% / 23.8% 5-10% / 61.5% 11-24%
- **OMS**: 8.3% Less than 5% / 22.6% 5-10% / 63.1% 11-24%
- **ENDO**: 8.6% Less than 5% / 24.1% 5-10% / 62.1% 11-24%
- **ORTH**: 6.3% Less than 5% / 36.8% 5-10% / 52.6% 11-24%
- **PED**: 7.7% Less than 5% / 29.7% 5-10% / 57.4% 11-24%
- **PERIO**: 10.1% Less than 5% / 31.5% 5-10% / 52.8% 11-24%
- **PROS**: 8.9% Less than 5% / 42.2% 5-10% / 46.7% 11-24%

*Insight: There are variations in patient volume by specialty.*
## Core Questions

**Is your dental practice paying staff this week?**

<table>
<thead>
<tr>
<th>Week</th>
<th>Yes, fully</th>
<th>Yes, partially</th>
<th>Not paying any staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week of March 23</td>
<td>27.3%</td>
<td>44.6%</td>
<td>28.1%</td>
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<td>2.8%</td>
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<tr>
<td>Week of June 29</td>
<td>87.3%</td>
<td>10.3%</td>
<td>2.4%</td>
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<tr>
<td>Week of July 13</td>
<td>89.8%</td>
<td>8.2%</td>
<td>1.9%</td>
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<tr>
<td>Week of July 27</td>
<td>91.6%</td>
<td>7.1%</td>
<td>1.3%</td>
</tr>
</tbody>
</table>

**Insight:** Dental practices are stabilizing at roughly 90% of pre-COVID-19 staffing levels.
### Core Questions

**PAY STATUS OF ASSOCIATES, EMPLOYEES, AND INDEPENDENT CONTRACTORS**

<table>
<thead>
<tr>
<th>Week of May 4</th>
<th>Week of May 18</th>
<th>Week of June 1</th>
<th>Week of June 15</th>
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<td>37.9%</td>
<td>36.1%</td>
<td>30.9%</td>
<td>27.8%</td>
<td>21.3%</td>
<td>8.0%</td>
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<tr>
<td>46.2%</td>
<td>36.1%</td>
<td>17.7%</td>
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<td>7.4%</td>
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<td>7.4%</td>
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<tr>
<td>64.8%</td>
<td>27.8%</td>
<td>7.4%</td>
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<td>8.0%</td>
<td>8.0%</td>
<td>8.0%</td>
<td>8.0%</td>
</tr>
<tr>
<td>75.1%</td>
<td>19.6%</td>
<td>9.6%</td>
<td>9.6%</td>
<td>9.6%</td>
<td>9.6%</td>
<td>9.6%</td>
</tr>
</tbody>
</table>

- **Yes, fully**
- **Yes, partially**
- **Not being paid at all**

**Insight:** Employee dentists are among the last to be hired back. About 75% of employee dentists are now being paid fully and another 20% partially.
Core Questions

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

<table>
<thead>
<tr>
<th>PPE Type</th>
<th>0 days</th>
<th>1 to 7 days</th>
<th>8 to 14 days</th>
<th>More than 14 days</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>N95/KN95 masks</td>
<td>14.8%</td>
<td>29.5%</td>
<td>49.4%</td>
<td>5.2%</td>
<td>0.2%</td>
</tr>
<tr>
<td>Surgical masks</td>
<td>22.3%</td>
<td>68.2%</td>
<td>9.5%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Face shields</td>
<td>17.3%</td>
<td>72.7%</td>
<td>10.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Gowns</td>
<td>18.4%</td>
<td>47.1%</td>
<td>34.5%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>N95/KN95 masks</td>
<td>27.7%</td>
<td>51.6%</td>
<td>12.8%</td>
<td>3.0%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Surgical masks</td>
<td>22.9%</td>
<td>67.7%</td>
<td>9.5%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
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<td>Face shields</td>
<td>16.8%</td>
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<td>0.0%</td>
</tr>
<tr>
<td>Face shields</td>
<td>16.1%</td>
<td>74.5%</td>
<td>11.0%</td>
<td>0.0%</td>
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</tr>
<tr>
<td>Gowns</td>
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</tr>
<tr>
<td>Surgical masks</td>
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<td>66.2%</td>
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</tr>
<tr>
<td>Face shields</td>
<td>16.0%</td>
<td>75.5%</td>
<td>8.5%</td>
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<tr>
<td>Gowns</td>
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<td>49.2%</td>
<td>34.5%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Week of June 15

Week of June 29

Insight: PPE availability in dental practices remains stable. For now.

Week of July 13

Week of July 27
### Question of the Week

Using the scale below, please describe your practice's experience obtaining each of the following types of PPE and supplies over the past two weeks.

**All respondents**

<table>
<thead>
<tr>
<th>PPE Type</th>
<th>Very Difficult (5)</th>
<th>Difficult (4)</th>
<th>Borderline (3)</th>
<th>Flexible (2)</th>
<th>Not Difficult (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>N95/KN95 masks</td>
<td>22.1%</td>
<td>22.7%</td>
<td>11.9%</td>
<td>17.5%</td>
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</tr>
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<td>15.6%</td>
<td>23.1%</td>
<td>26.1%</td>
</tr>
<tr>
<td>Face shields</td>
<td>8.6%</td>
<td>15.6%</td>
<td>23.1%</td>
<td>26.1%</td>
<td>41.5%</td>
</tr>
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<td>Gowns</td>
<td>23.4%</td>
<td>18.1%</td>
<td>22.0%</td>
<td>20.8%</td>
<td>14.2%</td>
</tr>
<tr>
<td>Disinfecting supplies</td>
<td>17.7%</td>
<td>24.4%</td>
<td>28.5%</td>
<td>17.5%</td>
<td>11.9%</td>
</tr>
</tbody>
</table>

1 - Not difficult  
2 - Slightly difficult  
3 - Borderline (easiest to get)  
4 - Difficult  
5 - Very difficult

[If 4 or 5 selected in previous question] You indicated that one or more types of PPE or supplies have been difficult to obtain. Please indicate the primary reason why.

**All respondents**

<table>
<thead>
<tr>
<th>PPE Type</th>
<th>Primarily Cost Prohibitve</th>
<th>Primarily Inadequate Supply</th>
<th>Both Cost Prohibitive and Inadequate Supply</th>
</tr>
</thead>
<tbody>
<tr>
<td>N95/KN95 masks</td>
<td>55.8%</td>
<td>44.2%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Surgical masks</td>
<td>35.6%</td>
<td>60.5%</td>
<td>4.0%</td>
</tr>
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</tbody>
</table>

**Insight:** N95/KN95 masks and gowns are the most difficult PPE supplies to obtain.
Thinking ahead to your practice’s expected patient volume in September and October, how do you expect it will compare to this week? It will be...

- Much higher in Sept/Oct: 16.0%
- A little higher in Sept/Oct: 39.5%
- About the same in Sept/Oct: 19.8%
- A little lower in Sept/Oct: 13.9%
- Much lower in Sept/Oct: 7.8%
- Not sure

Insight: About 1/3 of practices are expecting lower patient volumes in September and October. About 1/5 are expecting higher patient volumes. It is unclear at this stage how significant the “fall lull” might be.
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?

The ADA has partnered with the ‘Back-to-Normal Barometer’ to explore consumer sentiment toward visiting the dentist during the pandemic.
THE CHALLENGING QUEST FOR NORMALCY

Public opinion insights from the July 22, 2020 “Back-to-Normal Barometer”

RON BONJEAN, PARTNER, ROKK SOLUTIONS
RICH THAU, PRESIDENT OF ENGAGIOUS
JON LAST, PRESIDENT OF SPORTS & LEISURE RESEARCH GROUP
GINA DERICKSON, RESEARCH DIRECTOR OF ENGAGIOUS
CONTEXT: RESPONDENTS ACTIVELY ENGAGE

Percent who have participated in this activity in the past 12 months

- Visit a retail store: 76%
- Visit a doctor’s office: 66%
- See a movie in a theater: 62%
- Visit a dentist’s office: 50%
- Travel 50+ miles and 1+ nights hotel: 50%
- Attend a live sports event: 47%
- Take a commercial flight: 37%
- Essential services done in home: 31%
- Visit a theme park: 25%
- Non-essential services done in home: 23%
- Attend a conference or convention: 19%
- Take a cruise vacation: 17%
- Attend an open house for a home listed for sale: 15%
- Tour a home listed for sale (outside of an open house): 12%

n=598, Back to Normal Barometer, July 22, 2020
WAVE 8 CONFIDENCE BACK TO EARLY APRIL’S WAVE 1

Confidence Barometer

27%

Future Expectations

31%

Current Conditions

22%

Wave 7: n=598, Back to Normal Barometer – July 8, 2020
Wave 8: n=576, Back to Normal Barometer – July 22, 2020
CONFIDENCE WEAKER IN COVID-HEAVY STATES

“COVID-19 Heavy” states are slightly less confident in the country’s current status and prospects for the future.

Confidence Barometer

- COVID-19 Heavy: 25%
- COVID-19 Light: 28%

Current Conditions

- COVID-19 Heavy: 21%
- COVID-19 Light: 24%

Future Expectations

- COVID-19 Heavy: 29%
- COVID-19 Light: 33%

Wave 7: n=598, Back to Normal Barometer – July 8, 2020
Wave 8: n=576, Back to Normal Barometer – July 22, 2020
SLIGHT REBOUND IN % WHO WOULD RETURN TOMORROW

Are you currently willing to engage in the following activities, without hesitation?

- Visit a retail store
- Essential services done in home
- Visit a doctor’s office
- Visit a dentist’s office
- Non-essential services done in home
- Attend an open house for a home for sale
- Tour a home listed for sale (outside of an open house)
- Stay at a hotel
- Take a cruise
- Attend a conference or convention
- Attend a live sporting event
- Visit a theme park
- Fly commercially
- See a movie in a theater

n=598, Back to Normal Barometer, July 22, 2020
Vaccines
7 IN 10 PLAN TO BE VACCINATED

I will definitely get a COVID 19 vaccine when it is available.
ONE IN FOUR WOULD GET INOCULATED BY AIRLINE/HOTEL

Once a COVID 19 vaccine were available, I would be interested in getting one through a hotel or airline provider.
Dental Industry
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

- Recently Active: 23%
- Assurance Seekers: 8%
- Need a medical breakthrough: 12%
- Ready to go: 57%

- I would not be comfortable resuming this activity unless there was an approved COVID-19 vaccine and/or a proven medical protocol to mitigate and remedy the effects of the virus.
- I would be willing to resume this activity, as long as a combination of local or national medical authorities, local or national government officials, and/or the location I am visiting provided assurances it is safe to do so.
WITH ASSURANCES, 82% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next... Visit a dentist's office?

- Immediately: 45%
- Within one month: 17%
- Within two months: 10%
- Within three months: 10%
- Within 3-6 months: 10%
- Within six months to a year: 6%
- More than a year out: 2%

n=289, Back to Normal Barometer, July 22, 2020
LOCAL DENTAL-COVID CASES WOULD NOT IMPEDE VISITS

Let's assume that you became aware of a situation where someone in your area was confirmed to have contracted COVID-19 from a visit to a dental office that you were not personally a patient of. Which of the following best reflects your willingness to visit your own dentist?

- I would be fine visiting my own dentist without any hesitation or need additional assurances: 15%
- I would not be comfortable visiting my own dentist, unless there was an approved COVID-19 vaccine and/or a proven medical protocol to mitigate and remedy the effects of the virus: 24%
- I would be willing to visit my own dentist, as long as a combination of local or national medical authorities, local or national government officials, and/or the location I am visiting provided assurances it is safe to do so: 25%
- I would be fine visiting my own dentist with the assurance from the dentist’s office that they were using enhanced safety protocols related to COVID-19 in accordance with CDC and ADA guidelines: 36%

n=598, Back to Normal Barometer, July 8, 2020
CDC AND ADA MOST TRUSTED BY ASSURANCE-SEEKERS TO ACCEPT DENTAL VISITS ARE SAFE

Which of the following entities would you trust the most if that entity declared it is safe to visit the dentist?

- The CDC: 48%
- The American Dental Association: 22%
- The local health department where your dentist is located: 17%
- The dentist's own office: 9%
- A friend who recently visited the same dentist you use: 4%

n=23, Back to Normal Barometer, July 22, 2020
3/5 HAVE HEARD FROM THEIR DENTISTS ABOUT OFFICE HEALTH

Since the pandemic started, have you received any message about dental office health and safety from your own dentist?

- Yes, definitely: 60%
- No: 28%
- Maybe, I'm not sure: 12%

n=289, Back to Normal Barometer, July 22, 2020
EMAIL, TEXT & PHONE CALLS ARE BEST WAY TO REACH PATIENTS

If your dentist wanted not only to convey an important message to you about dental office health and safety, but also be confident you saw it, which form of communication should they use?

- Email: 56%
- Text: 50%
- Phone call: 48%
- U.S. Postal service mailing: 24%
- Online video: 15%
- Social media post: 14%
- None of these: 1%

n=333, Back to Normal Barometer, July 22, 2020
RON BONJEAN, PARTNER, ROKK SOLUTIONS
RICH THAU, PRESIDENT OF ENGAGIOUS
JON LAST, PRESIDENT OF SPORTS & LEISURE RESEARCH GROUP
GINA DERICKSON, RESEARCH DIRECTOR OF ENGAGIOUS
Advisory Task Force on Dental Practice Recovery

• Provide oversight and direction on development of tools and guidance for dental offices:
  – ADA Return to Work Interim Guidance Toolkit
  – ADA COVID-19 Hazard Assessment and Checklist

• Future topics:
  – Environmental controls
  – Updating existing content
  – Monitoring new developments and responding as necessary

• Dentistry Is Essential Health Care
Government and Public Affairs

- Fought for passage of an SBA Paycheck Protection Program (PPP) loan program ($349 billion) and the Economic Injury Disaster Loan (EIDL) advance that provides grants of up to $10,000.

- Lobbied FEMA to allow dentists to receive 1.5 million KN95 masks to aide in reopening of dental offices.

- Advocated for HHS to release provider relief funding to dentists and fought to extend the deadline twice for dentists to apply.

- Worked to secure a Department of Labor (DOL) small business exemption from paid leave and Family and Medical Leave Act (FMLA) provisions of the CARES Act.

- Worked to relieve dentists from paying federal student loans for 6 months, without accumulating interest.

- Engaged more than 150,000 dentists to send nearly 600,000 emails to Capitol Hill during the coronavirus deliberations via grassroots action alerts.
For More Details…

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