Looking Ahead to 2021: How COVID-19 Continues to Impact the Dental Care Sector

Insights from Data for the Week of January 18th

2. ‘Question of the Week’ data on COVID-19 vaccine confidence among the dental team and communication with patients.

3. The latest consumer sentiment data related to dental visits and COVID-19 vaccines.
HPI Impact of COVID-19 Tracking Poll


• Core measures: Status of your practice, volume of patients, PPE supply, financial sustainability.

• “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.
Insight: As of the week of January 18th, 99% of dental practices in the U.S. were open, and 43% of practices reported “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: Patient volume in private practices was at 80% of pre-COVID-19 levels as of the week of January 18th, and volume in public health settings was at 68% of pre-COVID-19 levels. These represent slight increases 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

Insight: Patient volume varied to some extent by geography, DSO affiliation, practice size, and specialty.

The highest patient volumes as of the week of January 18th were reported by dentists practicing in rural and suburban areas and dentists in group practices.
BLS Employment in Dental Offices

Employment as a Percentage of January 2020 Employment, by Health Care Industry

Insight: According to BLS data, employment in dental offices is back up to 99% of pre-COVID-19 levels as of the end of December.

https://www.bls.gov/news.release/empsit.t17.htm
Insight: Roughly 94% of dental practices were paying their staff fully and another 5% were partially paying their staff as of the week of January 18th. Staffing is stable.
Insight: Employee dentists have seen the biggest lingering employment effect. However, nearly 80% of employee dentists were being paid fully as of the week of January 18th, representing a slight increase over the past few months.

[If non-owner dentist] Are YOU being paid this week?

Pay Status of Non-Owner Dentists

- Not being paid at all
- Yes, partially
- Yes, fully
Core Questions

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

<table>
<thead>
<tr>
<th>PPE Item</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>9.2%</td>
<td>23.7%</td>
<td></td>
<td>63.2%</td>
<td></td>
</tr>
<tr>
<td>Surgical masks</td>
<td>20.9%</td>
<td></td>
<td></td>
<td>71.9%</td>
<td></td>
</tr>
<tr>
<td>Face shields</td>
<td>6.6%</td>
<td>13.6%</td>
<td></td>
<td>76.2%</td>
<td></td>
</tr>
<tr>
<td>Gowns</td>
<td>10.1%</td>
<td>18.1%</td>
<td></td>
<td>63.7%</td>
<td></td>
</tr>
<tr>
<td>Disinfecting supplies</td>
<td>8.4%</td>
<td>26.7%</td>
<td></td>
<td>63.0%</td>
<td></td>
</tr>
<tr>
<td>Gloves</td>
<td>11.2%</td>
<td>30.5%</td>
<td></td>
<td>56.1%</td>
<td></td>
</tr>
</tbody>
</table>

Insight: PPE availability in dental practices has been stable for several months. Gloves, N95/KN95s, disinfecting supplies, and gowns remain an issue for some.
Core Questions

In the last month, have you taken any of the following measures to maintain the financial sustainability of your dental practice?

<table>
<thead>
<tr>
<th>Measure</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Downsized dental team</td>
<td>9.1%</td>
</tr>
<tr>
<td>Reduced dental team hours</td>
<td>17.8%</td>
</tr>
<tr>
<td>Reduced employee wages and/or</td>
<td>2.9%</td>
</tr>
<tr>
<td>Disenrolled from dental benefits plans</td>
<td>7.7%</td>
</tr>
<tr>
<td>Changed dental materials supplier</td>
<td>17.3%</td>
</tr>
<tr>
<td>Raised fees</td>
<td>32.0%</td>
</tr>
<tr>
<td>Borrowed money from a bank</td>
<td>19.5%</td>
</tr>
<tr>
<td>Sold my practice</td>
<td></td>
</tr>
<tr>
<td>Joined a DSO or large group practice</td>
<td></td>
</tr>
<tr>
<td>Retired</td>
<td></td>
</tr>
<tr>
<td>Other, please specify</td>
<td>7.7%</td>
</tr>
</tbody>
</table>

Insight: Nearly a third of dentists last month raised fees. Others borrowed from a bank, reduced their dental team hours, and changed their materials suppliers.

Retirement rates have not changed due to COVID-19.
Core Questions

In the last month, have you taken any of the following measures to maintain the financial sustainability of your dental practice?

OMS
- Downsized dental team: 10.2%
- Reduced dental team hours: 5.1%
- Reduced employee wages / benefits: 1.7%
- Disenrolled from dental benefits plans: 11.9%
- Changed dental materials supplier / lab: 10.2%
- Raised fees: 28.3%
- Borrowed money from a bank: 18.6%
- Sold my practice: 1.7%
- Joined a DSO or large group practice: 1.7%
- Retired: 0.0%
- Other, please specify: 1.7%

ENDO
- Downsized dental team: 13.0%
- Reduced dental team hours: 15.2%
- Reduced employee wages / benefits: 2.2%
- Disenrolled from dental benefits plans: 10.9%
- Changed dental materials supplier / lab: 21.7%
- Raised fees: 32.6%
- Borrowed money from a bank: 19.6%
- Sold my practice: 0.0%
- Joined a DSO or large group practice: 2.2%
- Retired: 0.0%
- Other, please specify: 8.7%

ORTHO
- Downsized dental team: 13.8%
- Reduced dental team hours: 10.3%
- Reduced employee wages / benefits: 3.4%
- Disenrolled from dental benefits plans: 5.2%
- Changed dental materials supplier / lab: 15.5%
- Raised fees: 31.0%
- Borrowed money from a bank: 13.8%
- Sold my practice: 0.0%
- Joined a DSO or large group practice: 0.0%
- Retired: 0.0%
- Other, please specify: 12.1%
Core Questions

In the last month, have you taken any of the following measures to maintain the financial sustainability of your dental practice?

PED
- Downsized dental team: 11.1%
- Reduced dental team hours: 14.3%
- Reduced employee wages / benefits: 4.8%
- Disenrolled from dental benefits plans: 4.8%
- Changed dental materials supplier / lab: 15.9%
- Raised fees: 27.8%
- Borrowed money from a bank: 22.2%
- Sold my practice: 1.6%
- Joined a DSO or large group practice: 0.8%
- Retired: 1.6%
- Other, please specify: 9.5%

PERIO
- Downsized dental team: 12.1%
- Reduced dental team hours: 19.0%
- Reduced employee wages / benefits: 5.2%
- Disenrolled from dental benefits plans: 5.2%
- Changed dental materials supplier / lab: 17.2%
- Raised fees: 41.4%
- Borrowed money from a bank: 20.7%
- Sold my practice: 5.2%
- Joined a DSO or large group practice: 0.0%
- Retired: 1.7%
- Other, please specify: 3.4%

PROS
- Downsized dental team: 2.8%
- Reduced dental team hours: 8.3%
- Reduced employee wages / benefits: 2.8%
- Disenrolled from dental benefits plans: 5.6%
- Changed dental materials supplier / lab: 8.3%
- Raised fees: 33.3%
- Borrowed money from a bank: 19.4%
- Sold my practice: 0.0%
- Joined a DSO or large group practice: 0.0%
- Retired: 0.0%
- Other, please specify: 5.6%
Question of the Week

Are you applying for a Second Draw Paycheck Protection Program (PPP) loan?

- 21% Yes, I have already applied.
- 38% Yes, I am in the process of applying or will apply before the deadline.
- 21% No, I am not interested in applying for the Second Draw.
- 20% I am undecided at this time.

Insight: The majority of dentists have already applied for or are in the process of applying for the Second Draw PPP loan.
Question of the Week

Please select the statement that best represents your staff’s confidence or skepticism in the safety and effectiveness of the COVID-19 vaccines.

<table>
<thead>
<tr>
<th>52%</th>
<th>34%</th>
<th>13%</th>
</tr>
</thead>
</table>

- Most or all of my staff are confident in the safety and effectiveness of the vaccines.
- My staff are about equally divided about the safety and effectiveness of the vaccines.
- Most or all of my staff are skeptical about the safety and effectiveness of the vaccines.
- I am not sure how my staff feel about the vaccines.

**Insight:** According to dentists, there is by no means unanimously strong confidence in the safety and effectiveness of the COVID-19 vaccine among the dental team.
In your opinion, how important is it for dentists to talk with patients about COVID-19 vaccination?

- Extremely important [33%]
- Very important [32%]
- Moderately important [22%]
- Slightly important [8%]
- Not at all important [5%]

Insight: Most dentists believe it is important for dentists to discuss COVID-19 vaccination with patients.
Question of the Week

Have you been receiving questions from patients regarding COVID-19 vaccination?
- Yes [66%]
- No [34%]

Do you feel prepared to discuss COVID-19 vaccination with your patients?
- Yes [83%]
- No [7%]
- Not sure [10%]

Would it be helpful to you to have patient communication materials on COVID-19 vaccination from the ADA?
- Yes [62%]
- No [19%]
- Not sure [19%]

Insight: Dentists are receiving questions from patients regarding COVID-19 vaccination and generally feel prepared for these conversations.
Looking ahead to 2021, how confident are you in the recovery of:

- Your particular dental practice?
  - Very confident: 30.3%
  - Somewhat confident: 41.7%
  - Neither confident nor skeptical: 15.3%
  - Somewhat skeptical: 10.6%
  - Very skeptical: 10.4%

- The dental care sector in general?
  - Very confident: 25.1%
  - Somewhat confident: 47.5%
  - Neither confident nor skeptical: 15.1%
  - Somewhat skeptical: 10.9%
  - Very skeptical: 10.8%

**Insight:** Dentists at this stage are cautiously optimistic about the dental care recovery in 2021.
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 TO GO + RECENTLY ACTIVE CONTINUE UPWARD TREND

[Among those who have done this activity in the past 12 months:] For each of the following activities, please indicate which of the following conditions is closest to your current point of view: Recently active + Ready to go

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

n=485, Back to Normal Barometer, Jan. 13, 2021
WAVE 17: DENTISTS

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

- Recently Active: 34%
- Ready to go: 54%
- Assurance Seekers: 5%
- Need a medical breakthrough: 7%

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.
MAJORITY SAY IT’S SAFER TO VISIT THE DENTIST NOW

It is safer to visit the dentist now than it was back in April.

- Strongly agree: 39%
- Somewhat agree: 22%
- Somewhat disagree: 22%
- Strongly disagree: 17%

n=533, Back to Normal Barometer, Dec. 11, 2020
2/3 WOULD GET COVID VACCINE AT THE DENTIST

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?

- Yes: 65%
- No: 35%

n=485, Back to Normal Barometer, Jan. 16, 2021
THE PUBLIC IS SPLIT ON DENTISTS AS A SOURCE ON VACCINE INFO

Dentists can be a trusted source of information regarding the COVID-19 vaccine.

- Strongly agree: 31%
- Somewhat agree: 21%
- Somewhat disagree: 24%
- Strongly disagree: 24%
HESITANT PATIENTS WOULD RETURN IF STAFF IS VACCINATED

[Among those who are hesitant to visit a dentist:] Please indicate whether either or both of the following conditions would make you likely to immediately re-engage in visiting a dentist’s office.

- If all staff that you would come in contact with had received a COVID-19 vaccination: 64%
- If you had received a COVID-19 vaccination: 41%
- Neither: 23%

n=22, Back to Normal Barometer, Jan. 16, 2021
Key Take-Aways from the Week of January 18th

• **Recovery and Renewal:** As of the week of January 18th, patient volume was estimated at 80% of pre-COVID-19 levels on average. Staffing in dental offices was at 99% of pre-COVID-19 levels and four out of five employee dentists were being paid fully.

• **Financial Sustainability:** Over the past month, nearly a third of dentists raised fees. Others responded to the financial challenges of practice ownership by taking out loans, reducing their dental team hours, and changing suppliers. Retirement rates have not changed due to COVID-19.

• **Vaccine Issues:** Dentists are eager to be vaccinated. Other members of the dental team do not have as much confidence in the safety and effectiveness of the COVID-19 vaccine. The majority of the public would be interested in getting vaccinated at their dentist’s office if available, but they are split on whether dentists are a trusted source for vaccine information.

• **Consumer Sentiment:** Consumer confidence in returning to the dental office hit a new maximum, with 88% who have already been back or are ready to go. It is unlikely the remaining 12% will get back to the dentist before COVID-19 is under control.

• **Outlook for 2021:** The sector has recovered nearly fully in terms of hiring and employment. Patient volume has recovered to the 80% range compared to pre-COVID-19 levels. In our view, patient volume still has upside growth potential, but this is crucially tied to vaccine rollout. Based on this, we don’t anticipate full recovery until the summer or fall.
This 150-page report provides the dental industry with up-to-date insights into the purchasing habits and preferences of dentists. Highlights include:

- **How dentists’ approach to shopping for supplies has changed since the pandemic began.**
- **Measures dentists have taken – or might take in the future – to help maintain the financial sustainability of their dental practices.**
- **Views about in-person sales rep visits before and during the pandemic.**
- **Dentists’ views on what manufacturers and distributors can do to help them recover and adapt to a new normal.**

Purchase report at [www.ada.org/hpi](http://www.ada.org/hpi)