Economic Impact of COVID-19 on the Dental Care Sector: A Look at Week 3 of “Reopening”

Based on Latest Data from HPI’s Economic Impact Poll
As of May 4th, 27 states had re-opened for elective dental care.
As of May 18th, 40 states had re-opened for elective dental care.
As of May 18th, 40 states had re-opened for elective dental care.

For non-symptomatic patients, the dental Facility must seek viable options for reducing or containing aerosol production during care. The use of dental instruments that are known to generate aerosols are not allowed for dental cleanings.
HPI Economic Impact of COVID-19 Tracking Poll

- Bi-weekly poll
- Started week of March 23rd
- Three core measures:
  - Status of your practice
  - Volume of patients and collections
  - Status of your staff
- “Question(s) of the Week”
- Response rate around 50%
- Representative sample of dentists in private practice
- Forthcoming webinar analyzing data from dentists in public health settings

### Number of responses

<table>
<thead>
<tr>
<th>Wave</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week of March 23</td>
<td>19,154</td>
</tr>
<tr>
<td>Week of April 6</td>
<td>6,109</td>
</tr>
<tr>
<td>Week of April 20</td>
<td>6,614</td>
</tr>
<tr>
<td>Week of May 4</td>
<td>6,774</td>
</tr>
<tr>
<td>Week of May 18</td>
<td>6,504</td>
</tr>
</tbody>
</table>
Core Questions

What is the current status of your dental practice?

Insight: The week of May 18th, 65% of dental practices in the U.S. were open, more than twice as many 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>
<td></td>
<td></td>
</tr>
<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>
</tbody>
</table>
Core Questions

What is the current status of your dental practice?

**SOLO DENTISTS**

<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>75.7%</td>
<td>19.5%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Week of April 6</td>
<td>78.5%</td>
<td>19.2%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Week of April 20</td>
<td>77.9%</td>
<td>19.4%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Week of May 4</td>
<td>55.6%</td>
<td>14.2%</td>
<td>20.7%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Week of May 18</td>
<td>52.4%</td>
<td>28.8%</td>
<td>10.7%</td>
<td>8.1%</td>
</tr>
</tbody>
</table>

**LARGE GROUP (10+ DENTISTS)**

<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>64.8%</td>
<td>25.8%</td>
<td>10.8%</td>
<td></td>
</tr>
<tr>
<td>Week of April 6</td>
<td>65.5%</td>
<td>26.2%</td>
<td>8.3%</td>
<td></td>
</tr>
<tr>
<td>Week of April 20</td>
<td>60.0%</td>
<td>28.2%</td>
<td>11.8%</td>
<td></td>
</tr>
<tr>
<td>Week of May 4</td>
<td>54.9%</td>
<td>13.2%</td>
<td>26.4%</td>
<td>10.6%</td>
</tr>
<tr>
<td>Week of May 18</td>
<td>44.8%</td>
<td>29.9%</td>
<td>18.4%</td>
<td>6.9%</td>
</tr>
</tbody>
</table>

*Insight: Larger dental practices are getting back to normal slightly quicker.*
### What is the current status of your dental practice?

<table>
<thead>
<tr>
<th>Age Group</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>&lt;35</td>
<td>16.6%</td>
<td>59.6%</td>
<td>18.9%</td>
<td>4.9%</td>
</tr>
<tr>
<td>35-44</td>
<td>13.4%</td>
<td>61.0%</td>
<td>20.5%</td>
<td>5.1%</td>
</tr>
<tr>
<td>45-54</td>
<td>10.4%</td>
<td>58.9%</td>
<td>25.0%</td>
<td>5.7%</td>
</tr>
<tr>
<td>55-64</td>
<td>9.2%</td>
<td>48.0%</td>
<td>34.6%</td>
<td>8.2%</td>
</tr>
<tr>
<td>65+</td>
<td>8.0%</td>
<td>44.2%</td>
<td>38.2%</td>
<td>9.6%</td>
</tr>
</tbody>
</table>

**Insight:** Older dentists continue to be less likely to re-open. Earlier data showed older dentists had highest concerns over transmission.
Core Questions

What is the current status of your dental practice?

<table>
<thead>
<tr>
<th>Specialty</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>GP</td>
<td>11.2%</td>
<td>52.2%</td>
<td>29.5%</td>
<td>7.0%</td>
</tr>
<tr>
<td>OMS</td>
<td>11.7%</td>
<td>66.3%</td>
<td>16.0%</td>
<td>6.1%</td>
</tr>
<tr>
<td>ENDO</td>
<td>14.9%</td>
<td>68.3%</td>
<td>12.9%</td>
<td></td>
</tr>
<tr>
<td>ORTHO</td>
<td>8.2%</td>
<td>66.7%</td>
<td>21.3%</td>
<td></td>
</tr>
<tr>
<td>PED</td>
<td>6.3%</td>
<td>60.4%</td>
<td>27.9%</td>
<td>5.4%</td>
</tr>
<tr>
<td>PERIOD</td>
<td>7.8%</td>
<td>56.0%</td>
<td>28.3%</td>
<td>7.8%</td>
</tr>
<tr>
<td>PROS</td>
<td>8.0%</td>
<td>57.3%</td>
<td>24.0%</td>
<td>10.7%</td>
</tr>
</tbody>
</table>

Insight: There is variation across specialties in the pace of re-opening.
A Closer Look at “Early Openers”

Insight: Practices that re-opened week of May 4th were more likely to be located in counties with lower COVID-19 infection rates.

Areas with high number of new COVID-19 cases

Distribution of Dental Offices According to Open/Closed Status and Number of New COVID-19 Cases per Week per 100,000 Population in that County

- Practice is closed
  - 0 new cases: 44%
  - 1 to 10 new cases
  - 11 to 50 new cases
  - 51 to 100 new cases
  - 101 to 500 new cases
  - 500+ new cases

- Practice is open
  - 0 new cases: 35%
  - 1 to 10 new cases
  - 11 to 50 new cases
  - 51 to 100 new cases
  - 101 to 500 new cases
  - 500+ new cases

- Practice is closed
  - 0 new cases: 18%
  - 1 to 10 new cases
  - 11 to 50 new cases
  - 51 to 100 new cases
  - 101 to 500 new cases
  - 500+ new cases

- Practice is open
  - 0 new cases: 18%
  - 1 to 10 new cases
  - 11 to 50 new cases
  - 51 to 100 new cases
  - 101 to 500 new cases
  - 500+ new cases

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Core Questions

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

Total Patient Volume

- Week of April 6: 84.8% • 7.6%
- Week of April 20: 86.0% • 7.7%
- Week of May 4: 59.0% • 8.8%, 7.3%, 9.7%, 9.6%
- Week of May 18: 28.4% • 6.9%, 8.7%, 18.3%, 21.0%, 16.6%

Insight: Nationally, patient volume was at 38% of pre-COVID-19 levels the week of May 18th, week 3 of dentistry’s re-opening.

Volume of Total Collections

- Week of April 6: 68.8% • 15.6%, 7.5%
- Week of April 20: 76.9% • 13.0%
- Week of May 4: 59.9% • 13.1%, 9.1%, 9.1%
- Week of May 18: 32.1% • 11.0%, 13.6%, 20.2%, 14.5%, 8.4%
Insight: Nationally, dental practices continue to hire back staff at a steady pace.

Is your dental practice paying staff this week?

- **Week of March 23**: 27.3% Yes, fully, 44.6% Yes, partially, 28.1% Not paying any staff
- **Week of April 6**: 10.7% Yes, fully, 45.4% Yes, partially, 43.8% Not paying any staff
- **Week of April 20**: 12.7% Yes, fully, 41.9% Yes, partially, 45.4% Not paying any staff
- **Week of May 4**: 32.5% Yes, fully, 35.9% Yes, partially, 31.6% Not paying any staff
- **Week of May 18**: 58.1% Yes, fully, 26.5% Yes, partially, 15.4% Not paying any staff
PAY STATUS OF ASSOCIATES, EMPLOYEES, AND INDEPENDENT CONTRACTORS

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

<table>
<thead>
<tr>
<th>Week of May 4</th>
<th>13.7%</th>
<th>29.8%</th>
<th>56.5%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week of May 18</td>
<td>27.3%</td>
<td>37.9%</td>
<td>34.8%</td>
</tr>
</tbody>
</table>

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

**Insight:** Layoffs hit employee dentists hard. They are now being hired back, but not as rapidly as other staff.

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

<table>
<thead>
<tr>
<th>Week of May 4</th>
<th>57.4%</th>
<th>19.9%</th>
<th>7.9%</th>
<th>14.8%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week of May 18</td>
<td>56.7%</td>
<td>20.1%</td>
<td>7.6%</td>
<td>15.6%</td>
</tr>
</tbody>
</table>

- Yes
- I've applied, but have not received any benefits yet
- No, my application was not approved
- No, I have not applied
Insight: PPE shortages are the biggest barrier to reopening dental practices in states permitting elective care.

Dentists also cite confusion over guidelines for reopening, hesitancy of dental team members to return to work, and concerns over transmission of COVID-19 as important reasons.
## PPE Availability

### Practice Open

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>11.2%</td>
<td>21.5%</td>
<td>28.8%</td>
<td>37.0%</td>
<td>9.5%</td>
</tr>
<tr>
<td>Surgical Masks</td>
<td>8.2%</td>
<td>22.8%</td>
<td>67.5%</td>
<td></td>
<td>5.5%</td>
</tr>
<tr>
<td>Face Shields</td>
<td>10.0%</td>
<td>18.0%</td>
<td>67.4%</td>
<td></td>
<td>4.6%</td>
</tr>
<tr>
<td>Gowns</td>
<td>13.5%</td>
<td>22.2%</td>
<td>23.3%</td>
<td>37.5%</td>
<td>5.5%</td>
</tr>
</tbody>
</table>

### Practice Closed

<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>22.0%</td>
<td>31.1%</td>
<td>22.5%</td>
<td>19.7%</td>
<td></td>
</tr>
<tr>
<td>Surgical Masks</td>
<td>13.5%</td>
<td>27.0%</td>
<td>53.0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Face Shields</td>
<td>9.4%</td>
<td>19.8%</td>
<td>21.3%</td>
<td>48.2%</td>
<td></td>
</tr>
<tr>
<td>Gowns</td>
<td>22.7%</td>
<td>29.6%</td>
<td>21.0%</td>
<td>21.9%</td>
<td></td>
</tr>
</tbody>
</table>

**Insight:** Practices that are open have higher PPE stockpiles compared to practices that are closed. This confirms PPE availability is an important factor in the decision to re-open.
PPE Availability

Insight: Nationally, PPE availability in dental practices improved the past two weeks.

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

<table>
<thead>
<tr>
<th>PPE Type</th>
<th>Week of May 4</th>
<th>Week of May 18</th>
</tr>
</thead>
<tbody>
<tr>
<td>N95/KN95 masks</td>
<td>30.9% 28.5% 19.4%</td>
<td>15.2% 24.9% 26.1%</td>
</tr>
<tr>
<td>Surgical masks</td>
<td>12.3% 26.5% 54.0%</td>
<td>8.8% 24.3% 62.3%</td>
</tr>
<tr>
<td>Face shields</td>
<td>17.5% 20.0% 19.5%</td>
<td>13.5% 19.1% 59.9%</td>
</tr>
<tr>
<td>Gowns</td>
<td>25.8% 27.3% 21.7%</td>
<td>16.7% 24.8% 22.7%</td>
</tr>
</tbody>
</table>

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

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As of May 18th, 40 states had re-opened for elective dental care.
Insight: In states that have re-opened, about three quarters of practices were open the week of May 18th.
Core Questions

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

Total Patient Volume

States where all dental procedures allowed
- 10.8% Less than 5%
- 8.7% 5-10%
- 20.7% 11-24%
- 29.4% 25-50%
- 25.3% 51-75%

51% average

States where most procedures allowed with some restrictions
- 23.2% Less than 5%
- 7.6% 5-10%
- 10.4% 11-24%
- 21.3% 25-50%
- 22.5% 51-75%
- 15.0% 76% or more

38% average

States where only emergency procedures allowed
- 69.2% Less than 5%
- 8.3% 5-10%
- 7.3% 11-24%

Insight: Procedure restrictions matter. In states allowing all elective procedures, patient volume is higher.
Core Questions

Is your dental practice paying staff this week?

- States where all dental procedures allowed: 75.4% (fully) + 18.6% (partially) + 12% (not paying)
- States where most procedures allowed with some restrictions: 59.5% (fully) + 28.4% (partially) + 12.2% (not paying)
- States where only emergency procedures allowed: 29.6% (fully) + 33.7% (partially) + 36.7% (not paying)

Insight: Procedure restrictions matter. Re-hiring has been most robust in states where all procedures are allowed.
A Closer Look at States That Have Been Open for 3 Weeks

As of May 4th, 27 states had re-opened for elective dental care. These states are in week 3 of re-opening.
### Core Questions

**What is the current status of your dental practice?**

<table>
<thead>
<tr>
<th>Date</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>6.9%</td>
<td>80.1%</td>
<td>12.9%</td>
<td></td>
</tr>
<tr>
<td>Week of April 6</td>
<td>82.2%</td>
<td>13.7%</td>
<td>4.1%</td>
<td></td>
</tr>
<tr>
<td>Week of April 20</td>
<td>81.8%</td>
<td>13.8%</td>
<td>4.4%</td>
<td></td>
</tr>
<tr>
<td>Week of May 4</td>
<td>6.5%</td>
<td>56.4%</td>
<td>29.7%</td>
<td>7.3%</td>
</tr>
<tr>
<td>Week of May 18</td>
<td>20.4%</td>
<td>72.4%</td>
<td>7.2%</td>
<td></td>
</tr>
</tbody>
</table>

*Insight: In states that have been open for elective care since May 4th, one in five practices are already fully back to normal.*
Core Questions

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

Total Patient Volume

- Week of April 6: 82.0% (10.0%)
- Week of April 20: 83.1% (10.2%)
- Week of May 4: 31.1% (10.0%, 11.8%, 18.7%, 19.1%, 9.5%)
- Week of May 18: 8.5% (22.7%, 30.9%, 27.6%)

- 31% average
- 54% average

- In states that have been open for elective care since May 4th, patient volume is rebounding steadily. By the week of May 18th, patient volume had rebounded to over half of pre-COVID 19 levels.

Volume of Total Collections

- Week of April 6: 65.4% (16.7%, 8.9%)
- Week of April 20: 72.7% (15.4%, 5.9%)
- Week of May 4: 37.1% (16.1%, 14.7%, 17.1%, 10.6%)
- Week of May 18: 8.5% (8.7%, 10.0%, 29.5%, 23.3%, 13.9%)

- In states that have been open for elective care since May 4th, patient volume is rebounding steadily. By the week of May 18th, patient volume had rebounded to over half of pre-COVID 19 levels.
Core Questions

Is your dental practice paying staff this week?

Insight: States that have been open for elective care since May 4th are seeing major re-hiring of staff.

<table>
<thead>
<tr>
<th>Week of March 23</th>
<th>Yes, fully 31.7%</th>
<th>Yes, partially 46.9%</th>
<th>Not paying any staff 21.5%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week of April 6</td>
<td>13.5%</td>
<td>50.7%</td>
<td>35.8%</td>
</tr>
<tr>
<td>Week of April 20</td>
<td>16.7%</td>
<td>46.8%</td>
<td>36.4%</td>
</tr>
<tr>
<td>Week of May 4</td>
<td>52.7%</td>
<td>32.0%</td>
<td>15.2%</td>
</tr>
<tr>
<td>Week of May 18</td>
<td>80.0%</td>
<td></td>
<td>16.5%</td>
</tr>
</tbody>
</table>
Core Questions

PAY STATUS OF ASSOCIATES, EMPLOYEES, AND INDEPENDENT CONTRACTORS

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

<table>
<thead>
<tr>
<th>Week</th>
<th>Yes, fully</th>
<th>Yes, partially</th>
<th>Not being paid at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week of May 4</td>
<td>22.7%</td>
<td>37.8%</td>
<td>39.5%</td>
</tr>
<tr>
<td>Week of May 18</td>
<td>40.5%</td>
<td>43.9%</td>
<td>15.6%</td>
</tr>
</tbody>
</table>

Insight: Employee dentists are not being hired back as fast as other staff.

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

<table>
<thead>
<tr>
<th>Week</th>
<th>Yes</th>
<th>I’ve applied, but have not received any benefits yet</th>
<th>No, my application was not approved</th>
<th>No, I have not applied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week of May 4</td>
<td>49.2%</td>
<td>18.3%</td>
<td>10.0%</td>
<td>22.5%</td>
</tr>
<tr>
<td>Week of May 18</td>
<td>38.1%</td>
<td>10.0%</td>
<td>14.3%</td>
<td>28.6%</td>
</tr>
</tbody>
</table>

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Insights from Consumer Polling

Lion’s Share of Adults Unlikely To Seek Non-COVID-19 Treatments Amid Pandemic

Adults were asked, in light of the pandemic, how likely they were to visit the following for appointments or treatments unrelated to the coronavirus:

- **Primary doctor**:
  - Likely: 39%
  - Don’t know/No opinion: 13%
  - Unlikely: 48%

- **Dentist**:
  - Likely: 22%
  - Don’t know/No opinion: 14%
  - Unlikely: 64%

- **Hospital**:
  - Likely: 21%
  - Don’t know/No opinion: 17%
  - Unlikely: 62%

- **Emergency room**:
  - Likely: 21%
  - Don’t know/No opinion: 20%
  - Unlikely: 59%

- **Walk-in clinic**:
  - Likely: 19%
  - Don’t know/No opinion: 16%
  - Unlikely: 65%

- **Emergency clinic**:
  - Likely: 19%
  - Don’t know/No opinion: 20%
  - Unlikely: 61%

- **Specialists**:
  - Likely: 19%
  - Don’t know/No opinion: 17%
  - Unlikely: 64%

- **Optometrist**:
  - Likely: 17%
  - Don’t know/No opinion: 17%
  - Unlikely: 66%

- **Mental health**:
  - Likely: 14%
  - Don’t know/No opinion: 19%
  - Unlikely: 66%

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**Q: Which of the following are you planning to do in the next 12 months?**

- **Go to the dentist**: 56%
- **Get an eye exam**: 47%
- **Get a physical**: 45%
- **Get treatment for a current medical condition**: 30%
- **Annual testing for a current chronic condition**: 28%
- **Visit someone in an assisted living home/nursing home**: 15%
- **Have elective surgery**: 9%
- **Go to physiotherapy**: 7%
- **Other**: 6%

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**TRUE Global Intelligence**, the in-house research practice of FleishmanHillard, fielded an online survey of U.S. adults aged 30-75 on May 4 – 5, 2020.
As of the week of May 18th, patient volume had rebounded to 38% of pre-COVID-19 levels nationwide. In the 27 states that have been open for elective care for at least three weeks, it has rebounded to 54% of pre-COVID-19 levels. Dental practices are hiring back staff at a rapid pace. The dental care sector is recovering.

Lack of PPE is an important factor limiting more dental practices from re-opening. That said, the stockpile of PPE in dental offices rose significantly in the past two weeks.

Confusion over guidelines for re-opening was also an important factor keeping more dentists from re-opening their office as was hesitancy among staff members to return to work and concerns over transmission of COVID-19. On the latter, dentists 65 and older expressed the highest level of concern.

Consumer attitudes, for now, are encouraging when it comes to visiting the dentist. The data indicate the public is prioritizing visiting the dentist when it comes to health care services.

Taken together, data for the week of May 18th suggest a promising recovery path for the dental economy so far. See you again in two weeks!
Thank You!

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