The Impact of COVID-19 on the Dental Care Sector

Industry Roundtable Hosted by HPI
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)
1. **Update on the latest data on dental sector recovery – week of November 2\textsuperscript{nd}**.

2. ‘Question of the Week’ data on dental practice profitability, student loans, and use of aerosol reducing procedures.

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 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 November 2nd, 99% of dental practices in the U.S. were open. About 38% of open practices reported “business as usual” in terms of patient volume. This has declined 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

Patient Volume
(% of pre-COVID-19 level, on average)

Insight: Patient volume in dental practices is at 77% of pre-COVID-19 levels as of the week of November 2nd. This represents a slight decrease over the past month.
COVID-19 Cases and Patient Volume

Is Dental Patient Volume Correlated with the Number of COVID-19 Cases among the Population?

October 5 - November 2, 2020

States with a greater increase in COVID-19 cases in their population have a greater decline in patient volume over the past month.

Insight: There is a relationship between COVID-19 cases and patient volume at the state level.

R² = 0.253

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Insight: Staffing in dental offices is at 97.5% of pre-COVID-19 levels as of end of October. This has risen steadily, but very slowly since the summer months.
### 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>10.7%</td>
<td>25.8%</td>
<td></td>
<td>60.1%</td>
<td></td>
</tr>
<tr>
<td>Surgical masks</td>
<td></td>
<td></td>
<td></td>
<td>69.8%</td>
<td></td>
</tr>
<tr>
<td>Face shields</td>
<td>6.5%</td>
<td>16.2%</td>
<td></td>
<td>74.9%</td>
<td></td>
</tr>
<tr>
<td>Gowns</td>
<td>11.5%</td>
<td>21.3%</td>
<td></td>
<td>59.5%</td>
<td></td>
</tr>
<tr>
<td>Disinfecting supplies</td>
<td>9.6%</td>
<td>32.3%</td>
<td></td>
<td>56.4%</td>
<td></td>
</tr>
<tr>
<td>Gloves</td>
<td>10.2%</td>
<td>29.3%</td>
<td></td>
<td>59.3%</td>
<td></td>
</tr>
</tbody>
</table>

**Insight:** PPE availability in dental practices has been stable for several months. Gowns, N95s, and disinfecting supplies remain the biggest issue.
Question of the Week

Please select the statement that best describes your practice’s profitability BEFORE the COVID-19 pandemic.

ALL RESPONDENTS

- 56%: It was highly profitable
- 39%: It was somewhat profitable
- 4%: It just about broke even
- 1%: It was somewhat unprofitable
- 0%: It was highly unprofitable
- 0%: Not sure

Please select the statement that best describes your practice’s profitability NOW.

ALL RESPONDENTS

- 11%: It is highly profitable
- 49%: It is somewhat profitable
- 27%: It is breaking just about even
- 9%: It is somewhat unprofitable
- 4%: It is highly unprofitable
- 1%: Not sure

Insight: 95% of dentists had highly or somewhat profitable practices before the pandemic, compared to 60% now. 13% report being unprofitable now, compared to 1% before the COVID-19 pandemic.
Question of the Week

Do you have any of the following types of student loans left to pay off?

- Federal student loans: 19.5% Yes, 80.5% No
- Private student loans: 14.3% Yes, 85.7% No

Did the lenders for your PRIVATE student loan(s) offer deferment or any other type of support during the public health emergency?

- 54% Yes
- 27% No
- 19% Not sure

Insight: Roughly 20% of the respondents have federal student loans, and 14% have private student loans. Among those with private student loans, over half report that their lenders offered deferment or other support during the pandemic.
**Question of the Week**

On a scale from 1 to 10, please rate the level of stress your student loan situation placed on you personally **BEFORE** the COVID-19 pandemic.

4.5

On a scale from 1 to 10, please rate the level of stress your student loan situation has placed on you personally **NOW**.

5.9

**Insight:** Among dentists who have student loans, the stress level caused by the loans has increased since the onset of the pandemic.
### Question of the Week

In an effort to reduce aerosols, how has your practice’s use of the following changed compared to before the COVID-19 pandemic?

<table>
<thead>
<tr>
<th>Material</th>
<th>Increased</th>
<th>Stayed about the same</th>
<th>Decreased</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hand scaling</td>
<td>65.6%</td>
<td>32.6%</td>
<td></td>
</tr>
<tr>
<td>Silver diamine fluoride (SDF)</td>
<td>23.3%</td>
<td>74.4%</td>
<td></td>
</tr>
<tr>
<td>Glass ionomers</td>
<td>10.9%</td>
<td>87.8%</td>
<td></td>
</tr>
<tr>
<td>Fluoride varnish</td>
<td>13.2%</td>
<td>85.0%</td>
<td></td>
</tr>
<tr>
<td>Dental sealants</td>
<td></td>
<td></td>
<td>90.9%</td>
</tr>
</tbody>
</table>

**Insight:** Roughly two-thirds of practices are doing more hand scaling compared to before the pandemic. Nearly a quarter are using more SDF, while 13% have increased their use of fluoride varnish and 11% have increased their use of glass ionomers.
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.
83% READY AND WILLING TO SEE A DENTIST

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

- **Recently Active** 23%
- **Assurance Seekers** 5%
- **Need a medical breakthrough** 12%
- **Ready to go** 60%

- 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.

n=210, Back to Normal Barometer, Oct. 21, 2020
Key Take-Aways from November 2\textsuperscript{nd} Data

- **Recovery:** As of the week of November 2\textsuperscript{nd}, 99% of dental offices in the U.S. were open, but fewer than 40% reported “business as usual” in terms of patient volume. Patient volume was estimated at 77% of pre-COVID-19 levels, a slight decline over previous weeks. Staffing in dental offices was at 97.5% of pre-COVID-19 levels, while roughly one-quarter of employee dentists are not being paid fully. The latest data suggest that we are firmly in a “new normal” or that economic activity in dental offices might be starting to slow.

- **COVID-19 Cases and Patient Volume:** Given the recent rise in COVID-19 cases across the country, HPI has continued to explore whether there is a relationship between COVID-19 cases and patient volume by state, as well as COVID-19 test positivity rates and patient volume. Patient volume is, at most, only slightly correlated with both COVID-19 cases and test positivity rates.

- **Operating Costs and Profitability:** Nine out of ten dentists reported higher operating costs as of the week of November 2\textsuperscript{nd} compared to before the pandemic. Profitability of dental practices has decreased significantly. An estimated 27% of dentists currently report they are “breaking even” with another 13% reporting they are “unprofitable”.

- **Student Loans:** Among dentists who have student loans, the stress level caused by the loans has increased since the onset of the pandemic. Over half of dentists with private student loans report that their lenders offered deferment or other support during the pandemic.

- **Reducing Aerosols:** The use of hand scaling has increased in two-thirds of practices. Nearly a quarter are using more SDF than before the pandemic, and more than 10% have increased their use of fluoride varnish and glass ionomers.
Thank You!

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