The Impact of COVID-19 on the Dental Care Sector

Insights from Data for Week of August 24th
Today

1. Update on the latest data from HPI economic impact of COVID-19 tracking poll.

2. ‘Question of the Week’ data focusing dentist wellness.

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

• Bi-weekly poll beginning March 23rd.

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

• “Question(s) of the Week”.

• Nationally representative sample of about 4000 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 August 24th, nearly 99% of dental practices in the U.S. were open. More practices report “business as usual” in terms of patient volume.
Insight: Nationally, patient volume is leveling off. Patient volume in private practices is estimated at 74% of pre-COVID-19 levels as of the week of August 24th, largely unchanged over the past month.
Insight: Staffing in dental practices continues to slowly grow and is at 94% of pre-COVID-19 levels the week of August 24th.
Insight: Employee dentists have seen the biggest lingering employment effect. Nearly 80% of employee dentists are now being paid fully.

For those not being paid at all, less than half are receiving unemployment benefits, an increase since the week of August 10th.
Core Questions

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

- **N95/KN95 masks**: 11.9% 26.9% 57.1%
- **Surgical masks**: 22.3% 69.8%
- **Face shields**: 6.2% 15.0% 75.9%
- **Gowns**: 7.2% 14.1% 54.8%

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

Insight: PPE availability in dental practices has been stable for several weeks now. Gowns and N95/KN95 masks remain the biggest issue.
Questions of the Week

As a result of the COVID-19 pandemic, dental practices now use enhanced Personal Protective Equipment (PPE). Please indicate if you have experienced any of the following types of physical reactions as a result of using enhanced PPE. (Select all that apply.)

<table>
<thead>
<tr>
<th>Condition</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Headaches</td>
<td>36.3%</td>
</tr>
<tr>
<td>Dehydration</td>
<td>33.0%</td>
</tr>
<tr>
<td>Heat stress</td>
<td>37.5%</td>
</tr>
<tr>
<td>Pharyngitis</td>
<td>7.2%</td>
</tr>
<tr>
<td>Facial dermatitis</td>
<td>29.8%</td>
</tr>
<tr>
<td>Shortness of breath</td>
<td>26.2%</td>
</tr>
<tr>
<td>Back Pain</td>
<td>14.4%</td>
</tr>
<tr>
<td>Neck Pain</td>
<td>21.0%</td>
</tr>
<tr>
<td>Nausea</td>
<td>4.4%</td>
</tr>
<tr>
<td>Exhaustion</td>
<td>36.9%</td>
</tr>
<tr>
<td>General discomfort</td>
<td>42.8%</td>
</tr>
<tr>
<td>Other, please specify</td>
<td>8.7%</td>
</tr>
<tr>
<td>I have not experienced...</td>
<td>20.2%</td>
</tr>
<tr>
<td>I have not used enhanced PPE</td>
<td>1.5%</td>
</tr>
</tbody>
</table>

Insight: Four out of five dentists have experienced physical reactions due to using enhanced PPE.

General discomfort, heat stress, exhaustion, and headaches were most commonly reported.
Questions of the Week

What issues are currently the most challenging to you during the COVID-19 pandemic? (Select up to 3 responses.)

Insight: Planning for the future, obtaining PPE and other supplies, financial sustainability, and concern for health were the most commonly reported practice-related challenges due to the pandemic.
Questions of the Week

Have you experienced any of the symptoms listed below during the COVID-19 pandemic?

<table>
<thead>
<tr>
<th>Symptom</th>
<th>Not at all</th>
<th>Minimal</th>
<th>Moderate</th>
<th>Severe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depression</td>
<td>48.8%</td>
<td>34.2%</td>
<td>15.0%</td>
<td></td>
</tr>
<tr>
<td>Weight changes (gain or loss)</td>
<td>47.1%</td>
<td>31.8%</td>
<td>19.4%</td>
<td></td>
</tr>
<tr>
<td>Anxiety</td>
<td>22.9%</td>
<td>36.6%</td>
<td>34.6%</td>
<td></td>
</tr>
<tr>
<td>Decrease in quality of sleep</td>
<td>30.0%</td>
<td>34.5%</td>
<td>29.8%</td>
<td></td>
</tr>
<tr>
<td>Increased use of alcohol, ...</td>
<td>72.9%</td>
<td>17.7%</td>
<td>8.8%</td>
<td></td>
</tr>
<tr>
<td>Financial problems</td>
<td>28.1%</td>
<td>42.2%</td>
<td>25.5%</td>
<td></td>
</tr>
<tr>
<td>Relationship problems</td>
<td>61.4%</td>
<td>28.2%</td>
<td>8.6%</td>
<td></td>
</tr>
<tr>
<td>Changes in personality</td>
<td>54.3%</td>
<td>33.9%</td>
<td>10.9%</td>
<td></td>
</tr>
<tr>
<td>Other, please specify</td>
<td>85.6%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Insight: Anxiety, financial problems, and decreased quality of sleep were the most commonly reported symptoms associated with the pandemic.

Depression and weight changes were also indicated for the majority of the panel.

One-quarter have experienced increase use of alcohol, cigarettes, or drugs.
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

- Recently Active 26%
- 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.
- Ready to go 51%
- 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.
- Need a medical breakthrough 14%
- Assurance Seekers 9%

n=196, Back to Normal Barometer, August 19, 2020
2/5 of recent dentist visits were not routine

When you last visited the dentist, was it for...

**Within the past month**
- An urgent issue that could not wait: 14%
- A routine check-up: 60%
- An ongoing dental issue: 26%

**One to six months ago**
- An urgent issue that could not wait: 7%
- Ongoing issue: 8%
- A routine check-up: 85%

**Six to 12 months ago**
- An urgent issue that could not wait: 11%
- Ongoing issue: 9%
- A routine check-up: 80%
Key Take-Aways from August 24<sup>th</sup> Data

- As of the week of August 24<sup>th</sup>, 99% of dental offices in the U.S. were open and patient volume was estimated at 74% of pre-COVID-19 levels. Staffing was at 94% of pre-COVID-19 levels. These values were roughly unchanged since our last wave of data collection and suggest we are reaching a “steady state” of economic activity in dental offices.

- The pandemic has taken a toll on dentists’ wellness. More than half of the panel reported personal challenges with anxiety, financial problems, sleep quality, weight change, and/or depression during the COVID-19 pandemic. More than a quarter reported increased use of alcohol or other substances. Younger dentists are more affected than older dentists.

- Dentists indicate that the most challenging practice-related issues during the pandemic have been planning for the future and financial sustainability, experienced similarly by owner and nonowner dentists.

- Four out of five dentists have experienced physical reactions due to using enhanced PPE. General discomfort, heat stress, exhaustion, and headaches were the most commonly reported.

- Consumer polling indicates that about three out of four people who visited the dentist last year are comfortable visiting the dentist right now. Another 9% would be willing to go if they had some assurances that it is safe and the remaining 14% are waiting for a vaccine or proven treatment for COVID-19. Accordingly, patient volume in dental offices likely has an upper bound of around 85% of pre-COVID-19 levels for now.
Thank You!

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