

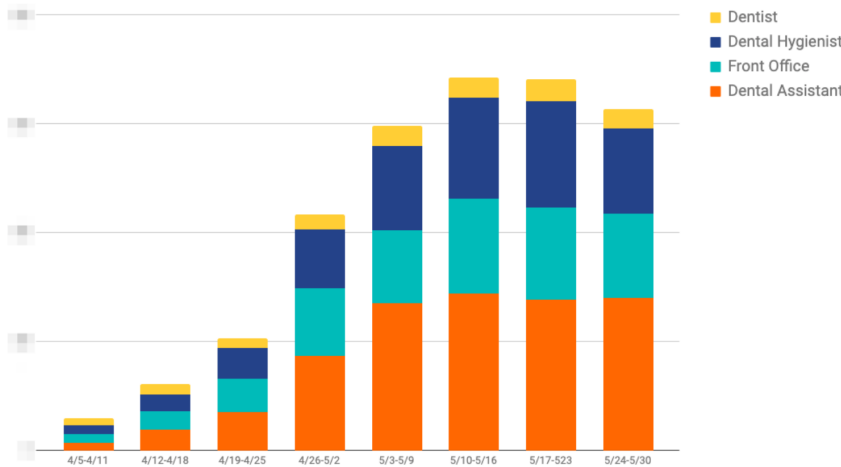
REPORT OVERVIEW

In our last report, we saw a rising trend in employment postings as states opened. That trend continues to show promise as more states reopen and practices work through patient backlogs. In this report, we track new progress as more states reopen, and also hear from dental professionals and dental practices on their challenges, experiences and statuses as they come back to the office.

WEEKLY JOB POSTINGS

In our previous report from 5/3-5/9, we noted that job postings were effectively back to normal. Mid-month, when a large portion of offices reopened, we saw a surge past normal postings, followed by a slight tapering off toward the end of the month.

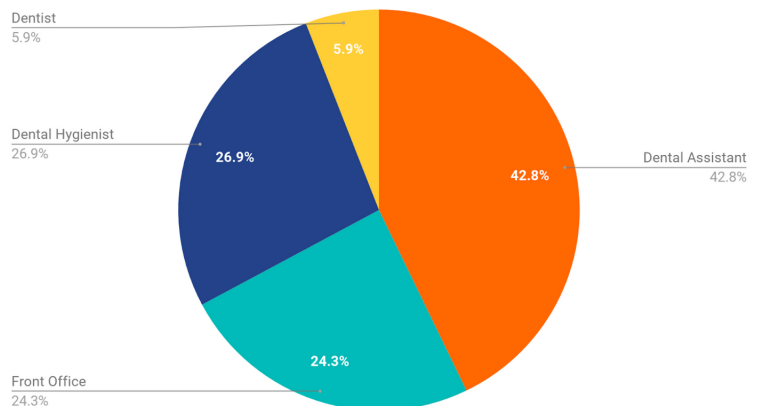
Weekly Job Postings by Position in April-May 2020



POSTINGS BY POSITION

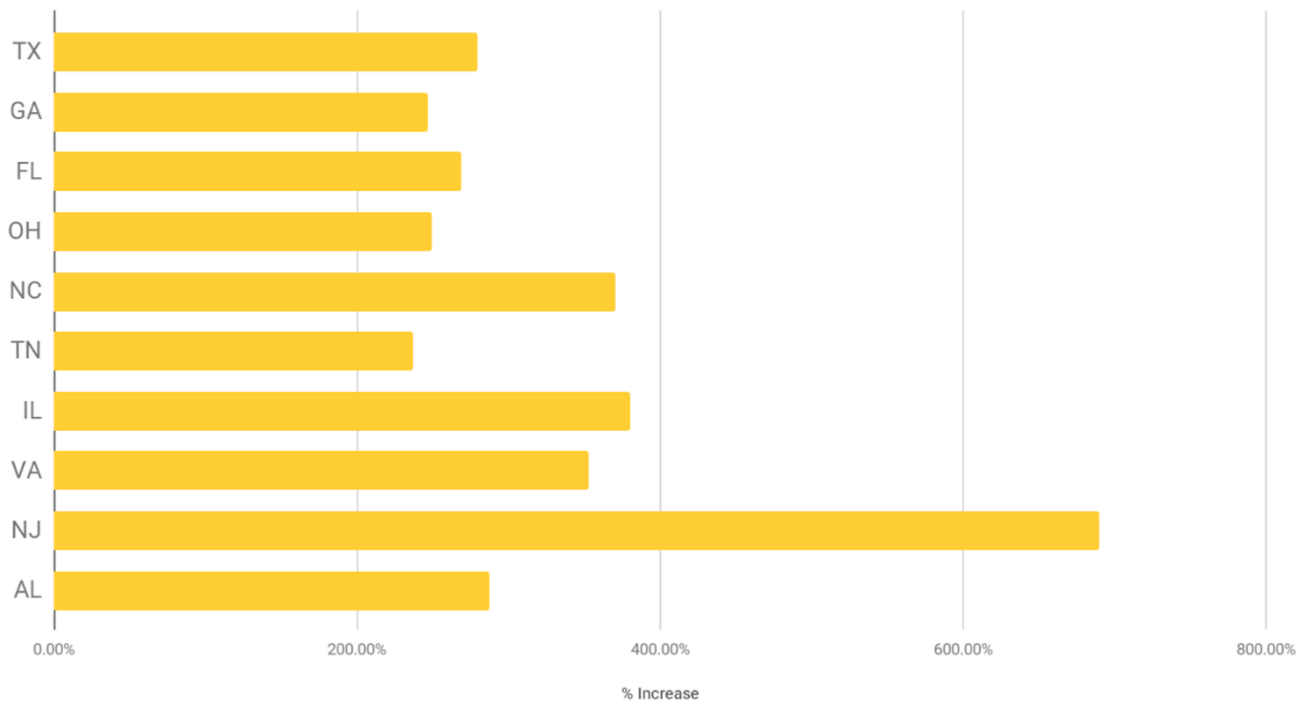
Upon the reopening of offices, demand for Dental Assistants surged, surpassing postings for Dental Hygienists who were previously most in demand.

Job Postings by Position in May 2020



JOB POSTINGS IN BACK-TO-WORK STATES

% Increase in Job Postings in Selected States: May 2020 vs April 2020



WHERE IS THE HIRING HAPPENING?

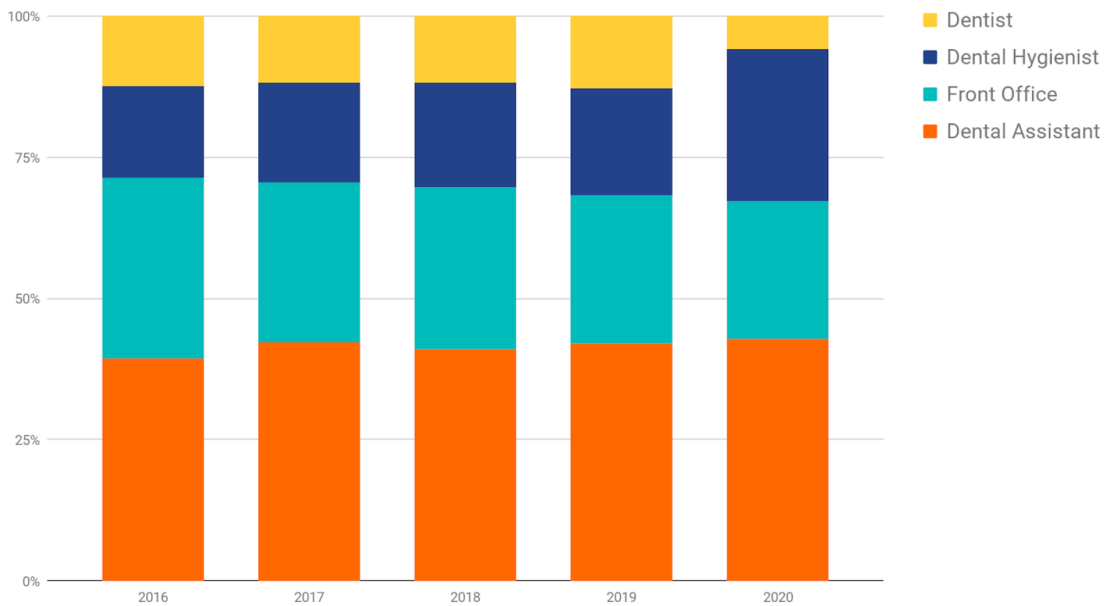
New Jersey's dental offices, which reopened on 5/26, have surpassed all recent hiring activity in the last four weeks with a 690% increase.

Illinois followed with a 380% increase, just slightly ahead of North Carolina (371%) and Virginia (353%).

Other recently opened states, Alabama (288%) and TN (237%), had solid increases as well. The first states to open, Texas (279%), Georgia (247%), Florida (269%) and Ohio (249%) continue showing strong recovery based on hiring needs.

5 YEAR POSTING COMPARISON BY POSITION, 2016- 2020

Job Postings by Position in May 2016-2020



Dental Hygienists are at the highest demand in the five year span with Front Office and Dentists (applicants) in the lowest demand. Dental Assistant demand has remained consistent over the last five years.

DID YOU KNOW?

"The healthcare industry gained 312,000 jobs between April and May. Around 244,000 of those jobs stemmed singularly from dentists' offices, making that industry responsible for a full tenth of May's jobs gains." (Source: The Week).

COMEBACK SURVEY RESULTS

SURVEY RESPONDENT BACKGROUND

1,709 TOTAL RESPONDENTS

DENTAL PROFESSIONALS

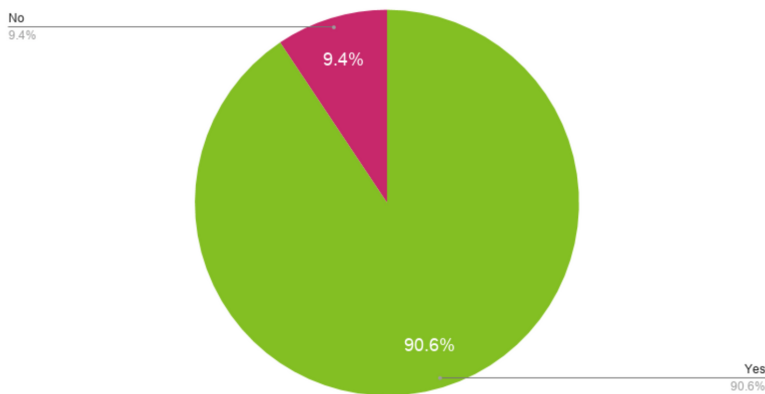
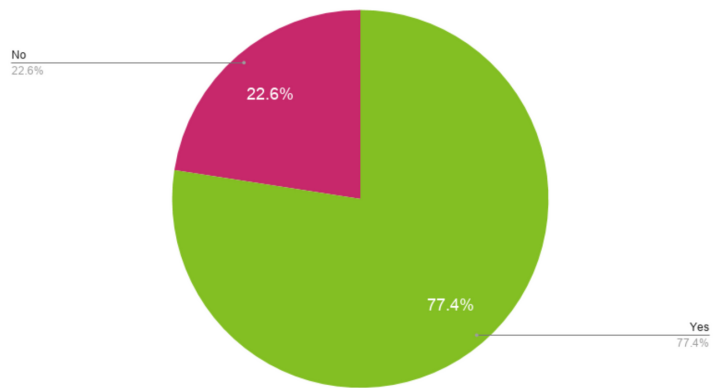
Registered Dental Hygienists (56%), Dental Assistants (23%), Other: Front Office Managers & Receptionists, Dentists, (21%)

RESPONDENTS: DENTAL OFFICE MANAGEMENT

Dentists (52%), Front Office Managers (25%), Other: Front Office Receptionists, Dental Hygienists, Dental Assistants, Practice Administrators, and Practice Managers (23%)

ARE YOU BACK AT WORK OR PLANNING TO RETURN IN THE NEXT FEW WEEKS?

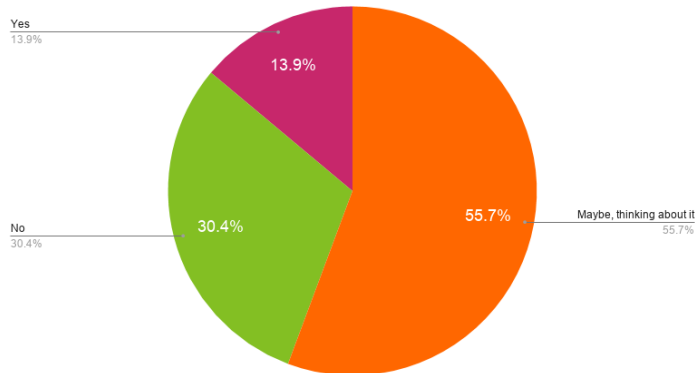
77.4% of Dental Professional respondents are back to work, while 22.6% said they are still furloughed or waiting to return.



HAS YOUR PRACTICE OPENED FOR ROUTINE CARE OR DO YOU PLAN TO REOPEN IN THE NEXT 2 WEEKS?

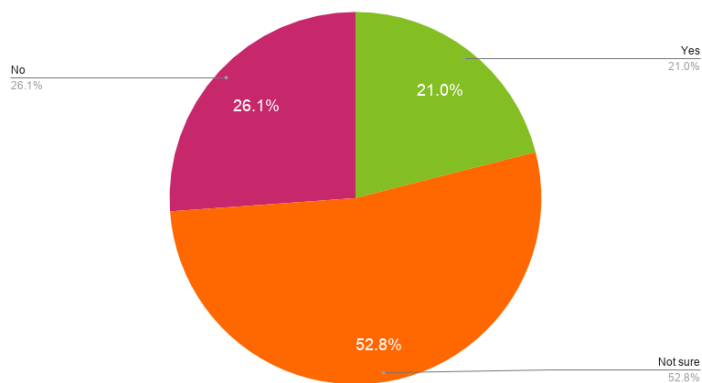
The majority of respondents say their office is reopened or is planning to reopen offering routine care within the next two weeks.

FURLOUGHED DENTAL PROFESSIONALS



ARE YOU PLANNING ON LEAVING THE DENTAL PROFESSION?

Nearly 70% of respondents say they are leaving or considering leaving the dentistry for a new profession.



DOES YOUR OFFICE HAVE THE NECESSARY PPE TO START TREATING PATIENTS AGAIN?

The main concern for most respondents is obtaining PPE.

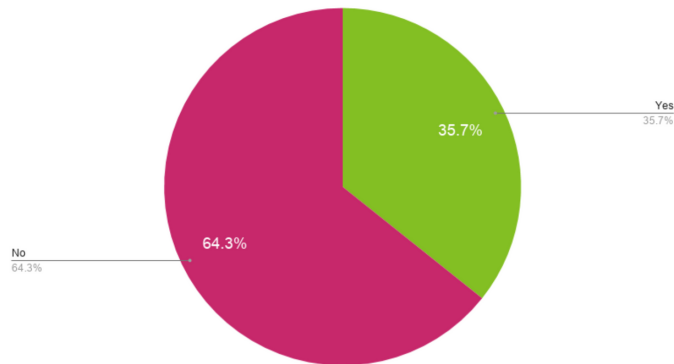
26.1% of Dental Professionals who aren't back to work say that their office does not have the necessary PPE available.

STATES NOT ALLOWING ELECTIVE OR NON-EMERGENCY DENTAL CARE

At the time of the survey, 28% of Dental Professionals' states were not allowing elective or non-emergency dental care, which is within 1 percentage point of dental offices, so this was in large part why offices remained closed and Dental Professionals have not been back to work.



CLOSED DENTAL OFFICES



DOES YOUR OFFICE HAVE THE NECESSARY PPE TO START SEEING PATIENTS AGAIN?

A whopping 64.3% of Dental Office Management who haven't opened their office yet responded that they do not have the necessary PPE to start treating patients again.



DO YOU HAVE PLANS TO SELL YOUR PRACTICE?

21.4% of Dental Office Management respondents indicated they are considering selling their practice..

Of the dental offices that were open or planning to reopen within the next 2 weeks, 84% were not worried about having to permanently close their practice.

BACK TO WORK CHALLENGES

WHAT ARE YOUR BIGGEST CHALLENGES UPON RETURNING TO WORK?

58.4% of respondents going back to work replied that obtaining necessary PPE was their biggest challenge.

55.5% said patient care being more complex, and 52% sited fear, anxiety, or other emotional distress as their biggest challenges.

36.2% said getting back into a working schedule was a big challenge.

13.9% are struggling with finding childcare and 8.3% in finding eldercare.

3.3% of this segment cited "other" personal reasons.

POST-COVID-19 DENTAL OFFICE CHANGES



Do you feel prepared for the post-Covid-19 changes for the industry?

- 42% of Dental Professionals are ready for the changes happening due to COVID-19
- 35% are not ready
- 23% are not sure what the changes will be or don't expect changes

Have you added routine hygiene appointments to your operations or are you planning to?

- 42% of Dental Professionals are seeing patients for hygiene appointments
- 18% plan to add routine hygiene appointments in the coming weeks
- 40% are not yet planning to



How many patients are you seeing in a day?

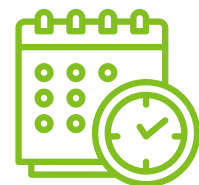
- 52% of Dental Professionals reported seeing over 7 patients a day
- 19% of Dental Professionals haven't started seeing patients yet
- 21% are seeing some patients (between 4-6)
- 3% are seeing a few (1-3)
- 5% marked the question as not applicable to their role

The majority (54%) of dental offices reported seeing over 11 patients a day

- 30% are seeing some patients (between 6-10)
- 10% are only seeing a few (between 1-5)
- 6% are not seeing patients yet

How many days/hours are you in operation or plan to be in operation?

- 69% are working normal office hours
- 13% have added additional hours
- 14% have shortened office hours
- 4% have not opened yet, or are by appointment only



SAFETY MEASURES



Do you feel comfortable with your office's safety measures for your return?

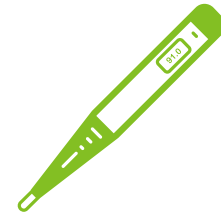
- 46% were comfortable
- 22% were not comfortable
- 32% were not sure, possibly because they haven't returned to work yet or were not yet informed of the coming safety measures

What safety measures are being taken in dental offices?

DENTIST OFFICE MANAGEMENT RESPONSES:

>90% said that they:

- are checking temperatures of patients and staff
- are using hand sanitizer on all patients
- have increased PPE for staff
- are screening patients by asking questions related to symptoms and exposure of COVID-19



>60% said that they:

- changed their waiting room layout or are making patients wait in their car
- require masks for patients in the waiting room or before they enter the operatory, and are doing a pre-procedural rinse

DENTAL PROFESSIONAL RESPONSES

>75% of Dental Professionals say their safety measures include:

- checking the temperature of patients (#1)
- increasing PPE for staff
- asking patients to use hand sanitizer
- doing a check-in call with patients before appointments
- checking temperatures of staff

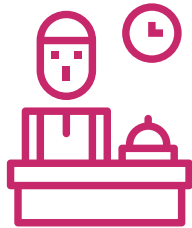
SAFETY MEASURES (CONT.)

- **>50% say their office has:**
 - changed the waiting room layout or are asking patients to wait in the car
 - started asking patients to do a pre-procedural rinse
 - required patients to wear a mask while walking through the office

Other safety measures being enacted are:

- installing air purifiers
- disinfecting nightly (fogging) and cleaning the office and all surfaces
- employing HEPA air scrubbers and air filters for viruses and bacteria into HVAC systems
- limiting the number of patients and guardians permitted in the office

WORKFORCE CHANGES



What percentage of each position is back in the office?

- 92% of Dental Assistants
- 80% of Dental Hygienists
- 79% of Dentists
- 76% of Front Office Managers and Receptionists (tie)

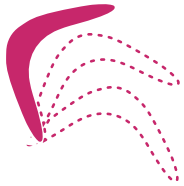
DENTAL OFFICES LOVE THEIR TEAMS!

Have you hired back your full team?

- 78% said yes
- 18% reported partially hiring back their team, but planned to rehire positions soon
- 4% would not



WORKFORCE CHANGES



If you could hire back your full pre-COVID team, would you?

- 80% already have
- 16% would if they could
- 4% would not hire back their full pre-Covid team

Do you plan to hire a team member in the next 4 weeks?

42% of dental offices responded that they were going to hire or were open to the possibility of hiring a new team member, while 58% responded that they were not planning to hire at all.



Which position(s) are you hiring?

The top response, at 61%, was Dental Assistants, followed by Front Office Receptionists (39%), and Dental Hygienists (37%).

What are the qualities dental offices are looking for in new team members?

84% seek team members with a positive mindset.

The other responses included: Emotional Intelligence (50%), communication skills (72%), Core Values match (63%), the right feeling / "IT" factor (58%), availability (56%), experience level (53%), DISC personality fit (49%), desired skillset (49%), and references (26%).

