



Dental Industry Loyalty Study

July 2023



The concept of customer loyalty has been around for decades. From boardrooms to marketing strategy sessions, customer loyalty has been a key component to revenue and profitability growth.

Loyal Customers Lead To Growth

Keeping your current customers happy and making repeat purchases is key to growth for almost every business. Data shows customers who are devoted to your business and brand are better for your bottom line.

- According to [Marketing Metrics](#), the probability of selling to an existing customer is up to 14 times higher than the probability of selling to a new customer.
- Bain & Company and Harvard Business School report that "[increasing customer retention rates by 5% increases profits by 25% to 95%.](#)"
- Research [found](#) that existing customers are 50% more likely to try new products and spend 31% more, on average, compared to new customers.
- New customer acquisition costs have increased [by almost 50%](#) in the past five years.

Forbes Magazine

- Customer Retention drives profitable growth
- Existing/loyalty customers buy more and are willing to try new products.

Developing, and sustaining an ongoing loyalty measurement program has been a challenge for many organizations.

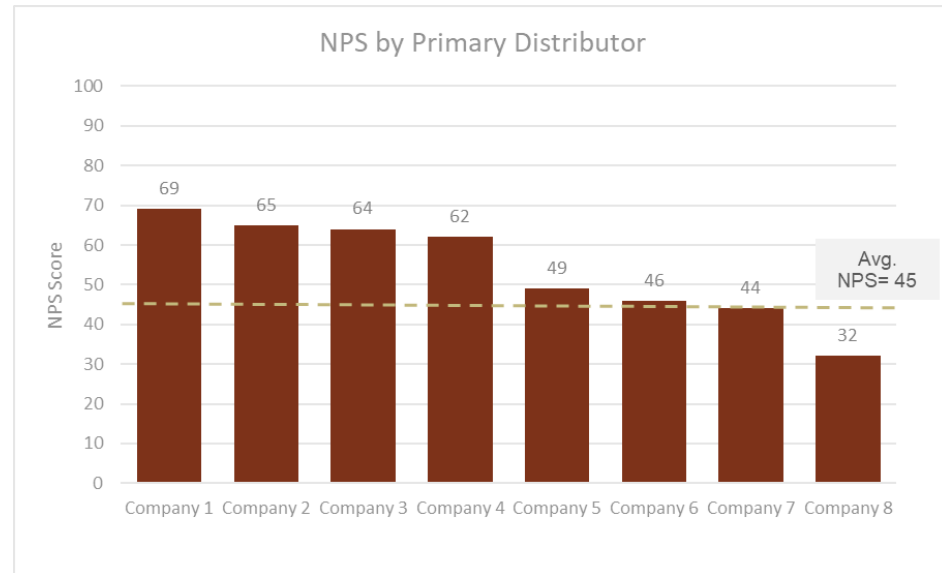
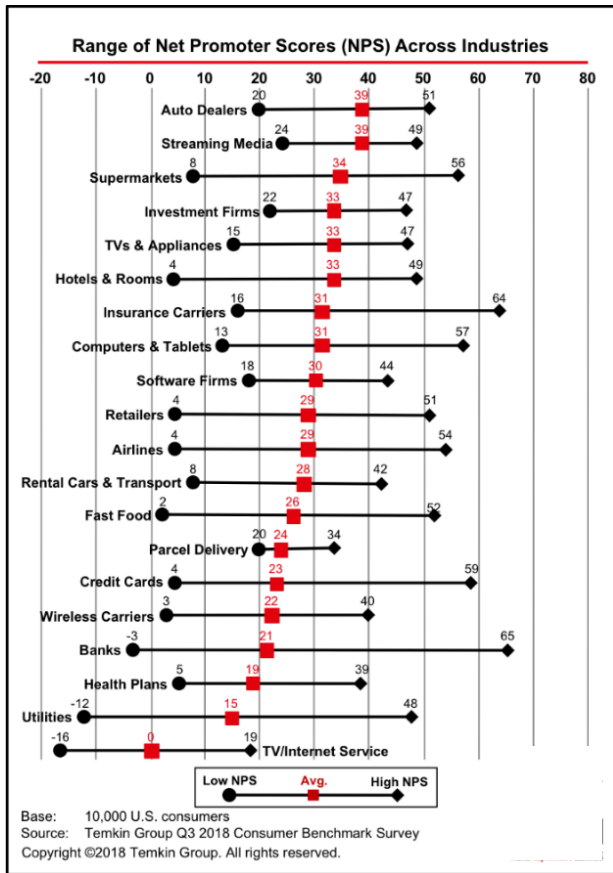
- Requires proper allocation of resources
- Requires capabilities

Benefits of the Dental Industry Loyalty Study

- Obtain NPS scores, satisfaction, and key loyalty drivers without having to allocated the internal resources to conduct the measurements.
- Ability to compare your scores to companies you consider to be leaders, or major competitors to assess your overall position in the market.
- Correlated NPS scores to market share growth for your organization vs competitors to assess the ROI associated with loyalty.
- Promote the results to your customers.

Internally derived measurements

- Rarely allow you to compare against competitors
- Sampling tends to be bias to only good customers
- Large sample sizes are difficult to maintain over time



The *Dental Industry Loyalty Study* provides Net Promoter Scores for leading distributors and manufacturers. This allows organizations to benchmark their results and set goals for improvement.

Dental Research Specialists conducted a survey with 679 US Dentists. The following companies are reported in the *Dental Industry Loyalty Study- First Edition*.

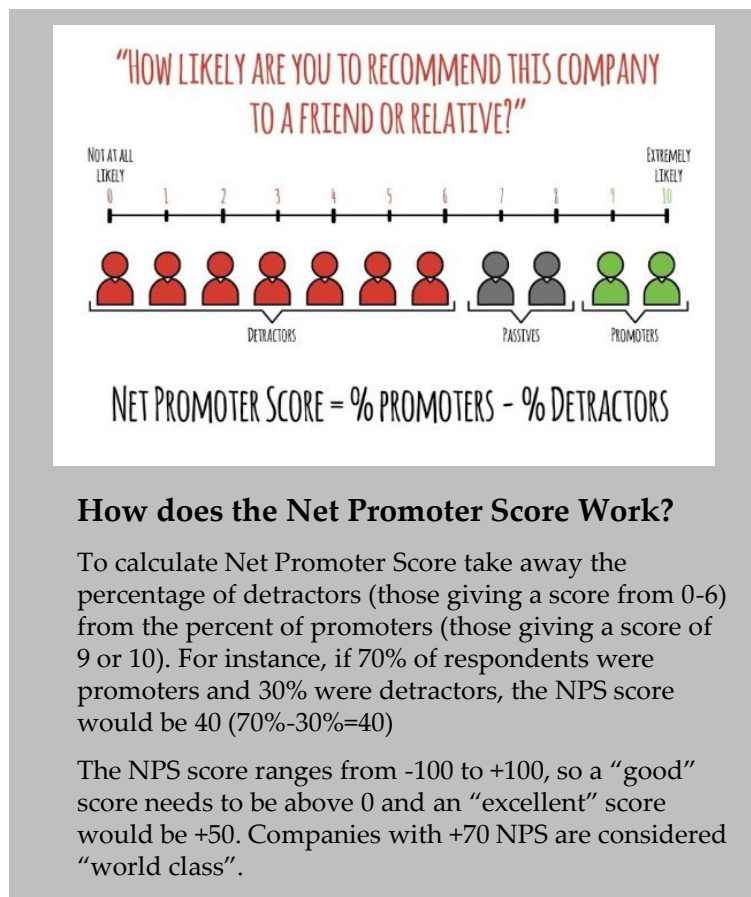
Distributors

Benco
Darby
Dental City
Henry Schein
Patterson
Pearson
Safco
Net 32

Manufacturers

3M	Ivoclar Vivadent
Benco Private Label	Johnson & Johnson
Bisco	Kerr
Brasseler	Kulzer
Carestream	Kuraray
Centrix	Parkell
Colgate	Patterson Private Label
Cranberry	Phillips
Crosstex	Premier
DenMat	Proctor & Gamble
Dentsply Sirona	Safco Private Label
DMG	Septodont
GC-America	Shofu
Henry Schein Private Label	Ultradent
Hu-Friedy	Voco

While there are many ways to measure loyalty, the standard approach continues to be Net Promoter Score. Developed over 30 years ago, it has become the benchmark across a wide range of industries.



The *Dental Industry Loyalty Study* goes beyond traditional Net Promoter Score and includes three additional measurements:

- Overall Satisfaction
- Likelihood to use in the future
- Positive Perception of the brand

Key Factors influencing loyalty

NPS is important, but it is as important to understand the key variables that influence NSP. This study examines 16 distributor attributes and 16 manufacturer attributes to determine what has the biggest impact on driving loyalty.

TABLE OF CONTENTS

- 3 Executive Summary
- 4 Loyalty
- 5 Measuring loyalty
- 6 Industry landscape
- 7 Response distribution
- 10 Conclusions

US Dental Distribution Loyalty

- 13 NPS by Distributor
- 14 Satisfaction, Repurchase & Perception by Distributor
- 16 Key Drivers of Distributor Loyalty
- 17 NPS vs Top 5 Key Loyalty Drivers by Distributor

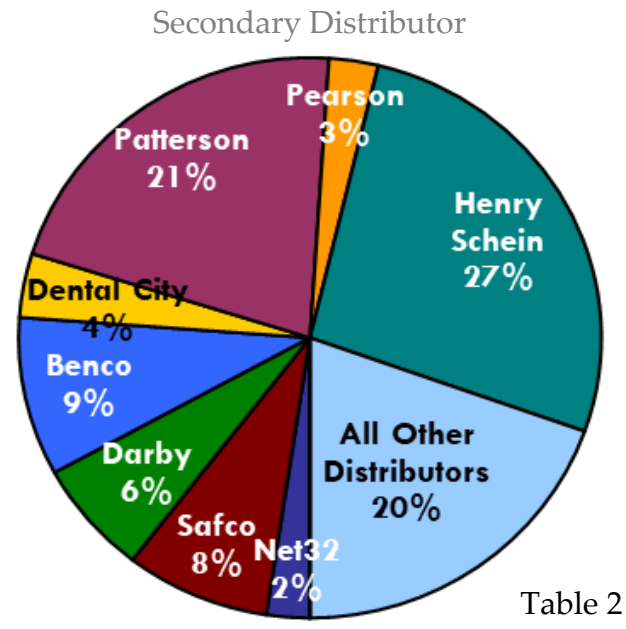
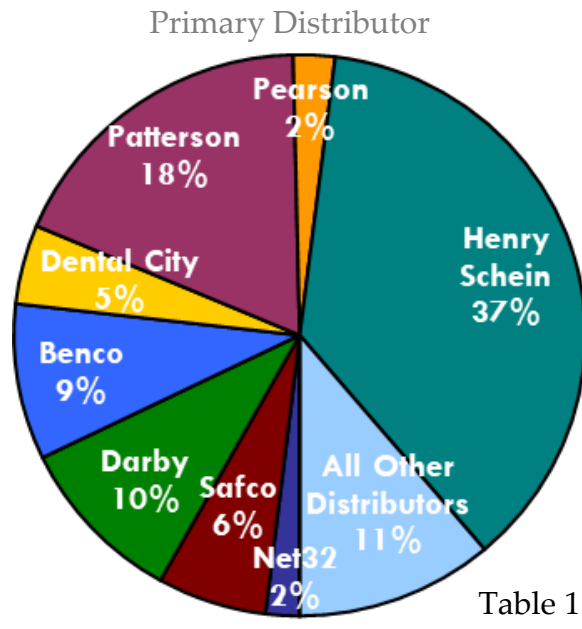
US Dental Manufacturer Loyalty

- 22 NPS by Manufacturer
- 23 Satisfaction, Repurchase & Perception by Manufacturer
- 25 Key Drivers of Manufacturer Loyalty
- 27 NPS vs Top 6 Key Loyalty Drivers by Manufacturer

Appendix

- 30 National Sample vs US Dentists
- 31 Individual company scores for vs total sample

The Dental Industry Loyalty Study was conducted with 679 US dentists, and closely matches the overall population of the US dentists. The distribution of respondents does not represent market share.



Manufacturers were chosen for the study based on perception and usage. In order to manage the number of manufacturers evaluated, a random number were selected for a full evaluation.

Total of 42 manufacturers were listed to determine positive brand perception. A total of 30 manufacturers had a very positive perception and their products had been used in the last 12 months. 5 were randomly selected from the 30 brands for a further evaluation. There are 15 manufacturers that were selected randomly but did not have enough responses to be fully reported in *2023 Dental Industry Loyalty Study- First Addition*¹.

Of the following list of merchandise manufacturers, which do you have a very positive perception of the company?

Of the manufacturers that you have a very positive perception of, which of them has your practice purchased product from in the last 12 months?

Randomly select 5 brands that have been elected from “Of the manufacturers that you have a very positive perception of, which of them has your practice purchased product from in the last 12 months?” responses.

1-Dental Research Specialists will work with Manufacturers interested in obtaining a higher number full responses .

The table below outlines the 2023 Dental Industry Loyalty Study respondent distribution vs the US dental population.

Postal Abbr.	State	Survey CMS	Survey %	# of Dentists	% in State	Survey +/- Dentists
AK	Alaska	0	0.0%	589	0.3%	-0.3%
AL	Alabama	5	0.7%	2,094	1.0%	-0.3%
AR	Arkansas	4	0.6%	1,281	0.6%	0.0%
AZ	Arizona	13	1.9%	4,324	2.1%	-0.2%
CA	California	117	17.2%	30,727	15.2%	2.1%
CO	Colorado	8	1.2%	3,990	2.0%	-0.8%
CT	Connecticut	11	1.6%	2,595	1.3%	0.3%
DC	District of Columbia	2	0.3%	750	0.4%	-0.1%
DE	Delaware	1	0.1%	463	0.2%	-0.1%
FL	Florida	39	5.7%	12,003	5.9%	-0.2%
GA	Georgia	17	2.5%	5,142	2.5%	0.0%
HI	Hawaii	7	1.0%	1,134	0.6%	0.5%
IA	Iowa	5	0.7%	1,640	0.8%	-0.1%
ID	Idaho	2	0.3%	1,041	0.5%	-0.2%
IL	Illinois	33	4.9%	8,652	4.3%	0.6%
IN	Indiana	8	1.2%	3,212	1.6%	-0.4%
KS	Kansas	6	0.9%	1,485	0.7%	0.2%
KY	Kentucky	6	0.9%	2,449	1.2%	-0.3%
LA	Louisiana	13	1.9%	2,196	1.1%	0.8%
MA	Massachusetts	17	2.5%	5,686	2.8%	-0.3%
MD	Maryland	13	1.9%	4,270	2.1%	-0.2%
ME	Maine	1	0.1%	775	0.4%	-0.2%
MI	Michigan	19	2.8%	5,755	2.8%	0.0%
MN	Minnesota	10	1.5%	3,363	1.7%	-0.2%
MO	Missouri	6	0.9%	2,983	1.5%	-0.6%

Postal Abbr.	State	Survey CMS	Survey %	# of Dentists	% in State	Survey +/- Dentists
MS	Mississippi	4	0.6%	1,289	0.6%	0.0%
MT	Montana	3	0.4%	637	0.3%	0.1%
NC	North Carolina	13	1.9%	5,970	2.9%	-1.0%
ND	North Dakota	0	0.0%	398	0.2%	-0.2%
NE	Nebraska	2	0.3%	1,266	0.6%	-0.3%
NH	New Hampshire	2	0.3%	874	0.4%	-0.1%
NJ	New Jersey	37	5.4%	7,246	3.6%	1.9%
NM	New Mexico	2	0.3%	1,017	0.5%	-0.2%
NV	Nevada	5	0.7%	1,771	0.9%	-0.1%
NY	New York	68	10.0%	14,242	7.0%	3.0%
OH	Ohio	15	2.2%	5,911	2.9%	-0.7%
OK	Oklahoma	5	0.7%	1,974	1.0%	-0.2%
OR	Oregon	9	1.3%	2,803	1.4%	-0.1%
PA	Pennsylvania	30	4.4%	7,293	3.6%	0.8%
RI	Rhode Island	2	0.3%	557	0.3%	0.0%
SC	South Carolina	6	0.9%	2,476	1.2%	-0.3%
SD	South Dakota	0	0.0%	480	0.2%	-0.2%
TN	Tennessee	8	1.2%	3,348	1.7%	-0.5%
TX	Texas	50	7.4%	16,324	8.1%	-0.7%
UT	Utah	6	0.9%	2,046	1.0%	-0.1%
VA	Virginia	12	1.8%	5,543	2.7%	-1.0%
VT	Vermont	0	0.0%	332	0.2%	-0.2%
WA	Washington	17	2.5%	5,535	2.7%	-0.2%
WI	Wisconsin	15	2.2%	3,401	1.7%	0.5%
WV	West Virginia	5	0.7%	865	0.4%	0.3%
WY	Wyoming	0	0.0%	310	0.2%	-0.2%

Dental Manufacturers

Manufacturer included in report \$6,500

Manufacturer not included in report \$4,500

Dental Distributors

Distributor included and sells

Private Label Products \$8,500

Distributor included in report \$6,500

Distributor not included in report \$4,500

Consultants & Analysts \$8,500

Who is utilizing the study?

- Distributors
- Manufacturers
- Dental Service Organizations
- Dental Industry Consultants
- Industry Analysts