WPI Communications, Inc., has released the results of its fourth annual Dental Marketing Barometer Survey. This survey provides data on marketing trends and spending for dental specialists and general dentists. This year’s survey included new questions on the use of social media and Internet marketing. For the first time, it also asked doctors to gauge the success of their marketing efforts.

Dental specialists and general dentists can use the data and analysis in this report to understand dental marketing trends overall and in their practice area. The Barometer Survey results yielded detailed data on marketing spending for 2012, as well as projections for 2013. Practices can use the intelligence in this report to understand where their peers focused marketing attention in 2012 and where they’ll focus time and money in 2013.

The Respondents

A total of 256 dental specialists and general dentists practicing in the United States and Canada responded to this survey. Of those, there were 40 endodontists, 24 orthodontists, 21 oral surgeons, 47 pediatric dentists, 27 periodontists, 23 prosthodontists and 74 general dentists. The respondents were self-selected and identified themselves as engaging in dental marketing. The number of participants in this year’s survey increased from 231 last year.

Revenue Rose Again for Nearly Half of Respondents

The same percentage of practices reported higher annual revenue in 2012 as did in 2011: 46%. Practices held fast with last year, which saw the most across-the-board increases since WPI Communications’ first survey in 2010.
The total number reporting that revenue stayed about the same was 35%, while 19% reported a drop. Looking back to 2011, 32% reported that revenue remained about the same, with 21% reporting decreases compared with 2010.

In 2012, three categories of professionals realized the greatest increase in revenue: periodontists at 59%, general dentists at 51% and endodontists at 50%. This is a very different list from 2011, which led with oral surgeons at 57% and prosthodontists and orthodontists at 52%, respectively.

Most Respondents Anticipate Revenue Increases in 2013

This year’s outlook is similar to projections for 2012. Revenue is anticipated to rise for 61% of respondents, a slight drop from the 65% who projected increases for 2012. A small number of respondents, 5%, anticipated revenue will drop, while 34% expected it to stay about the same.

General dentists were the most optimistic for a better 2013, at 74%. The next most optimistic were orthodontists at 58%, a dip from 70% in 2012 projections. Oral surgeons were the most cautious, with 48% expecting a more lucrative 2013.

More prosthodontists than any other group expected lower revenue this year, at 9%. But it’s not all gloom and doom for these specialists, because 52% of prosthodontists expected an increase. The findings here represent a mixed bag for periodontists. In the 2012 survey, 16% anticipated lower revenues. The 2012 projections were not far from the actual revenue reports, with 19% reporting lower decreases. But looking ahead to 2013, only 4% projected a decline and 52% expected a rise.

2012 Dental Marketing Details

*WPI Communications* evaluated practices’ use of 17 marketing activities. In addition to adding radio for the first time, six Internet marketing categories were introduced this year: Facebook, Google+, Pinterest, Twitter, Yelp and YouTube.

Once again, Web sites took the lead as the most widely used marketing tool of all. Even more professionals leveraged the power of their Web sites at 84% in 2012, compared with 72% last year. A full 100% of orthodontist respondents used a Web site to market their practices, up 15% from last year’s findings. Only 65% of endodontists used Web sites. Periodontists increased last year’s use of Web sites from 56% to 85% in 2012, in contrast.
Facebook, a newcomer to the survey, took second place. At 59%, respondents reported using Facebook to market their practices. Overall, this number was rather high. An overwhelming 92% of orthodontists used Facebook, followed by 72% of general dentists and 70% of pediatric dentists. Only 25% of endodontists and 37% of periodontists used Facebook in 2012. Because this was the first year Facebook has been evaluated, no comparison can be made with previous years. However, the number of specialists using this tool, from virtually all orthodontists surveyed to a quarter of all endodontists, was significant and warrants tracking for future trends.

Yellow page advertising was dislodged from second place by Facebook. With 41% of respondents advertising in the yellow pages, this was a 6% dip from last year’s results, a 16% drop from 2010 and a 23% fall from 2009. Once again, pediatric dentists used yellow page advertising most frequently at 62%, down from 69% in 2011. The next most common yellow page advertisers were prosthodontists at 43%.

The fourth and fifth most used marketing efforts saw little overall change from last year’s survey results. Practice brochures were used by 37%. More prosthodontists (57%) and orthodontists (50%) used practice brochures than anyone else. Endodontists used these brochures the least, at 23%.

Print advertising was up slightly, used by 35% of practices. Orthodontists used it the most, at 63%, with oral surgeons (43%) following. Only 10% of endodontists advertised in print.

For the second consecutive year, direct mail was used by 31% of practices, making it the sixth most used marketing method. Once again, general dentists used it the most, at 45%. Oral surgeons dropped from 39% last year to 10% in 2012, making them the professionals utilizing this method the least.

The three-way tie for seventh was between “lunch-and-learns,” “message-on-hold” and Google+, each used by 29% of practices. Message-on-hold dropped from 33%. However, orthodontists continue to use it most heavily at 50%. Lunch-and-learns held fairly steady with last year’s overall use. Periodontists remained far and away the lunch-and-learn leaders at 70%, up from 52% last year. More orthodontists (54%) than any other used the relatively new Internet marketing tool, Google+.

Newsletters to referring providers were used by 25% of respondents, a slight increase over 23% in last year’s survey. At 62%, oral surgeons used these at the greatest rate. Endodontists used referral newsletters the second most frequently, at 50%. For both endodontists and oral surgeons, referral newsletters were the most commonly used marketing method, next to the Web site.

Patient newsletters were used by 22% of respondents, up 4%, making them the ninth most used marketing tool. They were used by 34% of pediatric dentists, 30% of general dentists and 29% of orthodontists. No oral surgeons used patient newsletters in 2012.
Four methods were used by less than 20% of practices. Waiting-room videos were leveraged by 19% of respondents. This was no change from last year. What changed, however, was the drop in use by orthodontists, from 44% in 2011 to 33% last year. Waiting-room videos were used most by oral surgeons in 2012, at 43%.

Internet marketing and social media were measured for the first time this year. The survey revealed that 16% of respondents used YouTube and Twitter, respectively. Yelp was used by 14% of practices. Orthodontists engaged in the greatest volume of Internet marketing and social media. Endodontists engaged in the least.

The bottom two tools in dentists’ arsenals were radio at 6% and Pinterest at 3%. General dentists (14%) and orthodontists (13%) led the small field in radio advertising. Otherwise, usage was low, with zero periodontists, endodontists and oral surgeons turning to radio. Only a few each of orthodontists, general dentists and prosthodontists used Pinterest to market their practices.

For the third straight year, orthodontists engaged in the greatest volume of marketing activities. They were followed by prosthodontists and pediatric dentists. Endodontists and periodontists engaged in the lowest volume. This was a shift for prosthodontists, who finished very close to the bottom in 2011.

The Highs and Lows of Dental Marketing in 2012

Five marketing activities increased overall in 2012. Web sites saw the most dramatic rise, at 12%. Practice brochures were used by 5% more respondents. This brings balance to their 9% drop last year. Patient newsletters were used by 4% more practices. Newsletters to referring practitioners rose by 2%, and lunch-and-learns gained by 1%.

Three methods dipped. Yellow page advertising declined the most again in 2012, at 6%. Message-on-hold was used by 4% fewer, and print advertising by 3% fewer. There was no change in waiting-room videos or direct mail.

Next to dental Web sites, the most commonly used tools were:

- **Endodontists**—newsletters to referring practitioners (50%)
- **General dentists**—Facebook (72%)
- **Oral surgeons**—newsletters to referring practitioners (62%)
- **Orthodontists**—Facebook (92%)
- **Pediatric dentists**—Facebook (70%)
- **Periodontists**—lunch-and-learns (70%)
- **Prosthodontists**—practice brochure and Facebook (57%)
2013 Projections: Increased Spending in Most Marketing Activities

The respondents project that 2013 will bring increases in most categories of surveyed marketing activities—except yellow page advertising and Web sites—compared with real spending in 2012. Dental Web sites will dip 3%. It’s unclear if this means the respondents will cease to use their Web sites or plan no new investments in them in 2013. Yellow page advertising is projected to fall 10% across specialties, with only 17% of orthodontists planning to spend here in 2013.

The most significant jump on the horizon for this year is newsletters to referring health care practitioners—spiking from 25% to 43%. Endodontists and oral surgeons will continue to use newsletters to referring providers most prolifically. A full 76% of oral surgeons expect to use referral newsletters, second only to their use of Web sites. Endodontists will use referral newsletters (65%) more than any other marketing tactic, including Web sites. This would make referring newsletters the fourth most used tactic in 2013, behind Web sites, Facebook and practice brochures.

Patient newsletter use will see the next biggest jump, up from 22% to 38%. Pediatric dentists will lead in this category at 55%, followed by 53% of general dentists.

Practice brochures will climb by 14%. Message-on-hold will rise by 8% and be dominated by 79% of orthodontists. Waiting-room videos will increase for 6% of practices. Direct mail, lunch-and-learn, and radio advertising will all rise by 3%. This is most significant for radio advertising, which was used by only 6% of respondents in 2012. Print advertising will rise only slightly by 1%.

Internet Marketing Shifts

Not surprising, Internet marketing methods are projected to climb, some quite markedly. Google+ will be used by 42% of professionals, up 13% from real 2012 numbers. Orthodontists will dominate here at 71%. YouTube will be used by 28% of practices, a 12% jump, led by orthodontists, prosthodontists and general dentists. Twitter will increase by 9%, with 39% of general dentists and prosthodontists, respectively. Pinterest and Yelp will rise by 7% each, led in both cases by orthodontists.

In the context of overall increases, Facebook will trail slightly among Internet marketing activities at 6%, but will have a full 65% of professionals leveraging it. Leading the charge will be 92% of orthodontists and 82% of general dentists. Endodontists are the least enthusiastic here at 33%.
**Gauging the Impact of Marketing**

In another new question in this year’s survey, respondents were asked to rate their marketing efforts as “exceptionally good,” “very good,” “good,” “fair” and “poor.” Only 7% reported “exceptionally good,” led by 11% of general dentists.

“Very good” was the characterization of 23% of professionals. More than any other category, most (36%) said their efforts were “good,” followed by 27% reporting “fair” results. Only 6% reported “poor” results, which was dominated by 14% of oral surgeons. Oral surgeons are also the specialists most likely to consider marketing plans “not important” and to not use marketing consultants.

**Marketing Plans and Delegation**

The percentage of dentists who delegate marketing to a staff member held steady again this year at 52%. Orthodontists moved to the front of the pack at 79%. Notably, last year’s top marketing delegators, oral surgeons, dropped from 70% to 38%.

Use of marketing consultants rose a single percentage point to 23%. More general dentists and pediatric dentists used consultants (32% each) than any other professionals. Only 5% of oral surgeons turned to marketing consultants.

Almost all respondents, 99%, reported that it was either “very important” or “somewhat important,” to have a marketing plan or program for their dental practice, up slightly from 2011.

Of those, 88% of general dentists reported that it’s “very important.” Only 1% overall said a marketing plan was “not important,” including 10% of oral surgeons.

**How important is it to have a marketing plan or program?**
Key Research Findings and Conclusions

Here are some highlights of the 2013 Dental Marketing Barometer Survey:

1. The same percentage of practices (46%) reported higher annual revenue in 2012 as did in 2011, which was the best of the previous three years. Meanwhile, 19% reported a drop, and 35% reported no change between 2011 and 2012.

2. Compared with 2011, 59% of periodontists, 51% of general dentists and 50% of endodontists reported increased revenue. This was a completely different mix from 2011.

3. A full 60% projected a revenue increase in 2013.

4. General dentists were the most optimistic for 2013, with 74% expecting revenue to rise. Oral surgeons were the most cautious.

5. Web sites were again the most widely used marketing tool for dental specialists and general dentists. Every orthodontist surveyed used a Web site.

6. Facebook was the second most-used method. The number of specialists harnessing this tool, from virtually all orthodontists surveyed to a quarter of all endodontists, was significant.

7. Five marketing activities increased in overall use: Web sites (up 12%), practice brochures, patient newsletters, newsletters to referring practitioners and lunch-and-learns.

8. Yellow page advertising declined the most by 6%. Message-on-hold dropped by 4%, and print advertising fell by 3%.

9. Respondents projected that 2013 will bring increases across most categories of marketing activities, except for yellow page advertising and Web sites.

10. The biggest jump planned for 2013 is newsletters to referring health care practitioners. Endodontists and oral surgeons will continue to use these newsletters most.

11. For the third straight year, orthodontists engaged in the greatest volume of marketing activities.

12. Except for the use of Web sites, in 2013, Internet marketing will climb in all categories surveyed, with Google+ rising the most.

13. More than any other category, respondents characterized their marketing efforts as “good.”
### 2011 Key Research Findings and Conclusions

#### Responses
- Total: 233
- Periodontists: 25
- Prosthodontists: 23
- Pediatric Dentists: 26
- Orthodontists: 27
- Endodontists: 41
- Oral Surgeons: 23
- General Dentists: 68

#### How did 2011 revenue compare with 2010?
- Higher: 46%
- About the same: 32%
- Lower: 21%

#### Which of the following marketing methods did you use in 2011?

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<thead>
<tr>
<th>Method</th>
<th>Total</th>
<th>Periodontists</th>
<th>Prosthodontists</th>
<th>Pediatric Dentists</th>
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#### How do you expect 2012 revenue from your practice will compare with 2011?
- Higher: 65%
- About the same: 30%
- Lower: 4%

#### Which of the following marketing methods do you expect to use in 2012?

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#### Do you have a member of your office staff who is responsible for marketing?
- Yes: 52%
- No: 47%

#### Do you have an outside marketing consultant?
- Yes: 22%
- No: 77%

#### How important is it to have a marketing plan or program?
- Very important: 79%
- Somewhat important: 18%
- Not important: 3%
2013 Dental Marketing Barometer Survey
Results and Analysis

2012 Key Research Findings and Conclusions

<table>
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<tr>
<th>Responses</th>
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How did 2012 revenue compare with 2011?

- Higher: 46% 59% 30% 45% 33% 50% 38% 51%
- About the same: 35% 22% 43% 38% 46% 35% 52% 26%
- Lower: 19% 19% 26% 15% 21% 15% 10% 23%

Which of the following marketing methods did you use in 2012?

- Direct mail: 31% 30% 35% 30% 29% 20% 10% 45%
- Lunch-and-learn: 29% 70% 22% 15% 33% 40% 48% 11%
- Message-on-hold: 29% 22% 35% 47% 50% 10% 33% 22%
- Newsletter to referring health care practitioners: 25% 37% 26% 19% 4% 50% 62% 8%
- Patient newsletter: 22% 7% 26% 34% 29% 8% 0% 30%
- Practice brochure: 37% 30% 57% 40% 50% 23% 38% 35%
- Print advertising: 35% 15% 30% 40% 63% 10% 43% 42%
- Radio: 6% 0% 4% 4% 4% 50% 6% 0%
- Waiting-room video: 19% 15% 22% 13% 33% 3% 43% 20%
- Yellow page advertising: 41% 33% 43% 62% 29% 30% 43% 38%

Which of the following internet marketing methods did you use in 2012?

- Facebook: 59% 37% 57% 70% 92% 25% 43% 72%
- Google+: 29% 15% 35% 32% 54% 8% 19% 35%
- Pinterest: 3% 0% 9% 0% 13% 0% 0% 4%
- Twitter: 16% 4% 22% 15% 21% 3% 5% 28%
- Yelp: 14% 7% 4% 19% 21% 5% 5% 22%
- YouTube: 16% 4% 30% 11% 33% 5% 0% 24%
- Web site: 84% 85% 87% 87% 100% 65% 81% 86%

How do you expect 2013 revenue from your practice will compare with 2012?

- Higher: 60% 52% 52% 57% 58% 55% 48% 74%
- About the same: 34% 44% 39% 34% 33% 38% 48% 22%
- Lower: 5% 4% 9% 6% 8% 5% 5% 3%

Which of the following marketing methods do you expect to use in 2013?

- Direct mail: 34% 26% 39% 32% 21% 20% 24% 53%
- Lunch-and-learn: 32% 63% 22% 21% 58% 50% 62% 5%
- Message-on-hold: 37% 30% 39% 51% 79% 13% 43% 28%
- Newsletter to referring health care practitioners: 43% 56% 52% 38% 33% 65% 76% 22%
- Patient newsletter: 38% 15% 39% 55% 50% 13% 14% 53%
- Practice brochure: 51% 52% 65% 51% 54% 33% 62% 53%
- Print advertising: 36% 19% 43% 40% 58% 13% 43% 41%
- Radio: 9% 0% 4% 9% 13% 3% 10% 16%
- Waiting-room video: 25% 15% 39% 21% 33% 5% 38% 31%
- Yellow page advertising: 31% 19% 30% 53% 17% 28% 43% 24%

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### 2012 Key Research Findings and Conclusions (continued)

#### Which of the following internet marketing methods do you expect to use in 2013?

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<td>38%</td>
<td>43%</td>
</tr>
<tr>
<td>No</td>
<td>48%</td>
<td>63%</td>
<td>48%</td>
<td>40%</td>
<td>21%</td>
<td>38%</td>
<td>62%</td>
<td>57%</td>
</tr>
</tbody>
</table>

#### Do you have an outside marketing consultant?

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Periodontists</th>
<th>Prosthodontists</th>
<th>Pediatric Dentists</th>
<th>Orthodontists</th>
<th>Endodontists</th>
<th>Oral Surgeons</th>
<th>General Dentists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>23%</td>
<td>15%</td>
<td>30%</td>
<td>32%</td>
<td>17%</td>
<td>10%</td>
<td>5%</td>
<td>32%</td>
</tr>
<tr>
<td>No</td>
<td>77%</td>
<td>85%</td>
<td>70%</td>
<td>68%</td>
<td>83%</td>
<td>90%</td>
<td>95%</td>
<td>66%</td>
</tr>
</tbody>
</table>

#### How important is it to have a marketing plan or program?

<table>
<thead>
<tr>
<th>Importance</th>
<th>Total</th>
<th>Periodontists</th>
<th>Prosthodontists</th>
<th>Pediatric Dentists</th>
<th>Orthodontists</th>
<th>Endodontists</th>
<th>Oral Surgeons</th>
<th>General Dentists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very important</td>
<td>77%</td>
<td>78%</td>
<td>78%</td>
<td>68%</td>
<td>71%</td>
<td>73%</td>
<td>67%</td>
<td>88%</td>
</tr>
<tr>
<td>Somewhat important</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
<td>30%</td>
<td>25%</td>
<td>28%</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>Not important</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>10%</td>
<td>0%</td>
</tr>
</tbody>
</table>

#### How well do you rate your marketing efforts?

<table>
<thead>
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<th>Prosthodontists</th>
<th>Pediatric Dentists</th>
<th>Orthodontists</th>
<th>Endodontists</th>
<th>Oral Surgeons</th>
<th>General Dentists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceptionally good</td>
<td>7%</td>
<td>7%</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
<td>5%</td>
<td>5%</td>
<td>11%</td>
</tr>
<tr>
<td>Very good</td>
<td>23%</td>
<td>15%</td>
<td>26%</td>
<td>23%</td>
<td>29%</td>
<td>18%</td>
<td>29%</td>
<td>23%</td>
</tr>
<tr>
<td>Good</td>
<td>36%</td>
<td>30%</td>
<td>30%</td>
<td>38%</td>
<td>42%</td>
<td>53%</td>
<td>24%</td>
<td>31%</td>
</tr>
<tr>
<td>Fair</td>
<td>27%</td>
<td>41%</td>
<td>30%</td>
<td>28%</td>
<td>21%</td>
<td>18%</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Poor</td>
<td>6%</td>
<td>4%</td>
<td>9%</td>
<td>6%</td>
<td>0%</td>
<td>5%</td>
<td>14%</td>
<td>7%</td>
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</tbody>
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