DENTAL MONITOR

OMNIVISION digital

CLINICAL - EUROPE 2015

KEY-STONE Marketing research and consulting

Index

Introduction

Introduction

OMNIVISION digital

The OminiVision Digital Europe 2015 is an Omnibus Multiclient descriptive research, analyzing the performances in Europe of the main international manufacturers both in clinic and laboratories markets evaluated with regard to the new digital technologies, such as intraoral scanners, chairside milling (clinical), table top scanners, in lab milling and 3D printing (laboratories).

The number of interviews performed for this research is 1.000 dental practices; and it is fully representative of the population of the European dental practices.

The interviews were performed between July and September of 2015 through a CATI system made by our team of specialists.

Introduction - Statistical Note

With the amount of 1.000 dental practices interviewed; the sample and its results fully represent the population of the European dental practices.

- With a confidence level of 95% the maximum error (confidence interval) is +/- 3,5%.
- The data was processed using EXCEL, SPSS, STATISTICA.
- Due to the objectives of knowledge and the types of questions, the data was processed:
    - Contingency tables
    - Significance test

GLOSSARY

- The confidence level indicates the reliability level of the research. For example, a confidence level equal to 95% means that the phenomenon pointed out by the research is correct for the 95% of the cases.
- The confidence interval indicates how much the research data diverge from reality. As the sample results, even if representative, cannot be perfectly correspondent to those obtainable interviewing the entire population, each research has an approximation degree which represents the maximum error of the research. For example, a confidence interval of ± 3% indicates that if the research phenomenon is equal to 60%, the result can change, in comparison with reality, of an extra 3% or a minus 3% and in this way it is included between 63% (60%+3%) and 57% (60%-3%).

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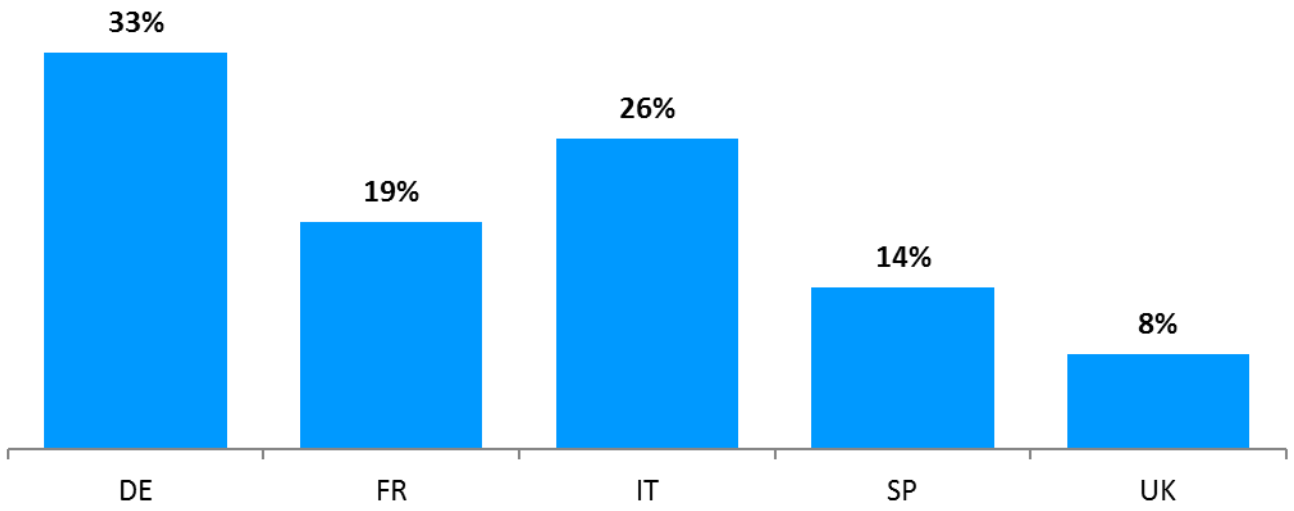
Introduction - Sample Composition 1/2

The sample consists of **1000** dental practices, stratified by Nielsen areas.

The number of interviews conducted in each country were about 200, but in order to accurately represent the market made up of the investigated countries, the cases have been properly weighted.



Country	Weighted cases	%
Germany	333	33%
France	191	19%
Italy	261	26%
Spain	136	14%
United Kingdom	80	8%
Total	**1.000**	**100%**

The weight has been calculated considering the distribution of the dental practices in Europe.

Please, refer to the next slide for the details of the weighting process.

Introduction - Sample Composition 2/2

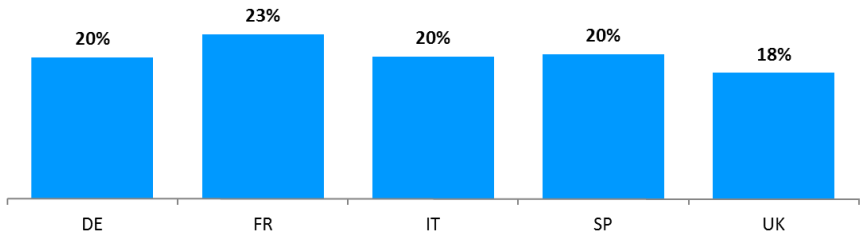
The number of interviews conducted in each country were about 200 as shown here on the right (A).

The weight of the surveyed countries regarding the dental practices is shown at (B).

The overall results (only the overall ones) must be representative of the total universe (all countries investigated) which the sample refers to, as if we were to interview the whole universe. If we assume that the number of dental practices is a reliable indication of the weight of a given country, we need to make sure that each country's sample weights as much as the number of the surgeries for that country, out of the total evaluated countries.
In this case, since the natural weight of the interviews in each country is different from the weight of the parameter considered, we have to apply a multiplying factor (it can be more or less than 1) to the number of performed interviews in each country, so that, only for the overall results, the weighted interviews are consistent with the parameter used.
The resulting number of weighted interviews is then shown at (C).

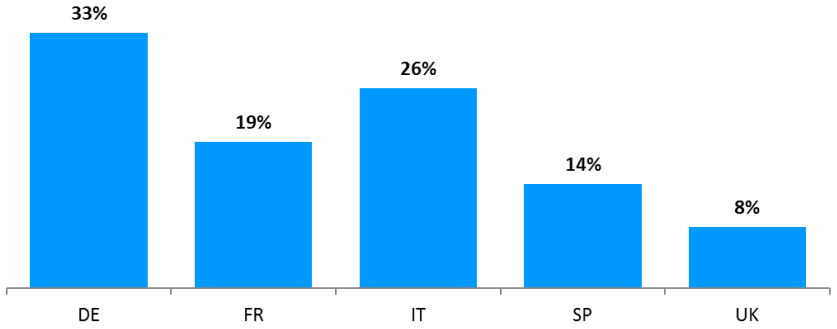
It is important to underline that the weights are applied only when the overall results are considered.
The charts showing the data of the single countries, are always referred to the actual interviews performed (A).

Country	Cases	%
Germany	197	20%
France	229	23%
Italy	198	20%
Spain	201	20%
United Kingdom	175	18%
Total	**1.000**	**100%**



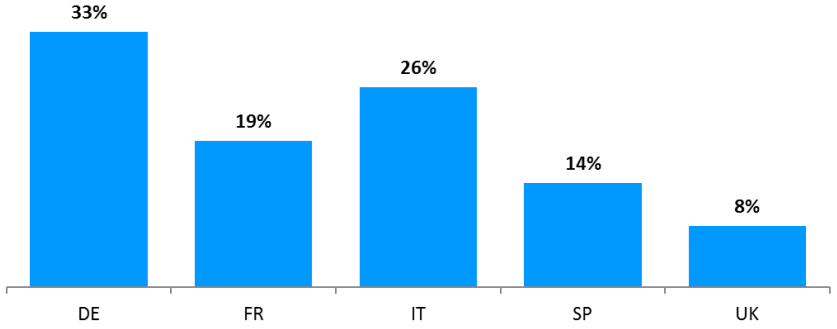
(A)

Country	Practices	%
Germany	47.900	33%
France	27.500	19%
Italy	37.500	26%
Spain	19.500	14%
United Kingdom	11.500	8%
Total	**143.900**	**100%**



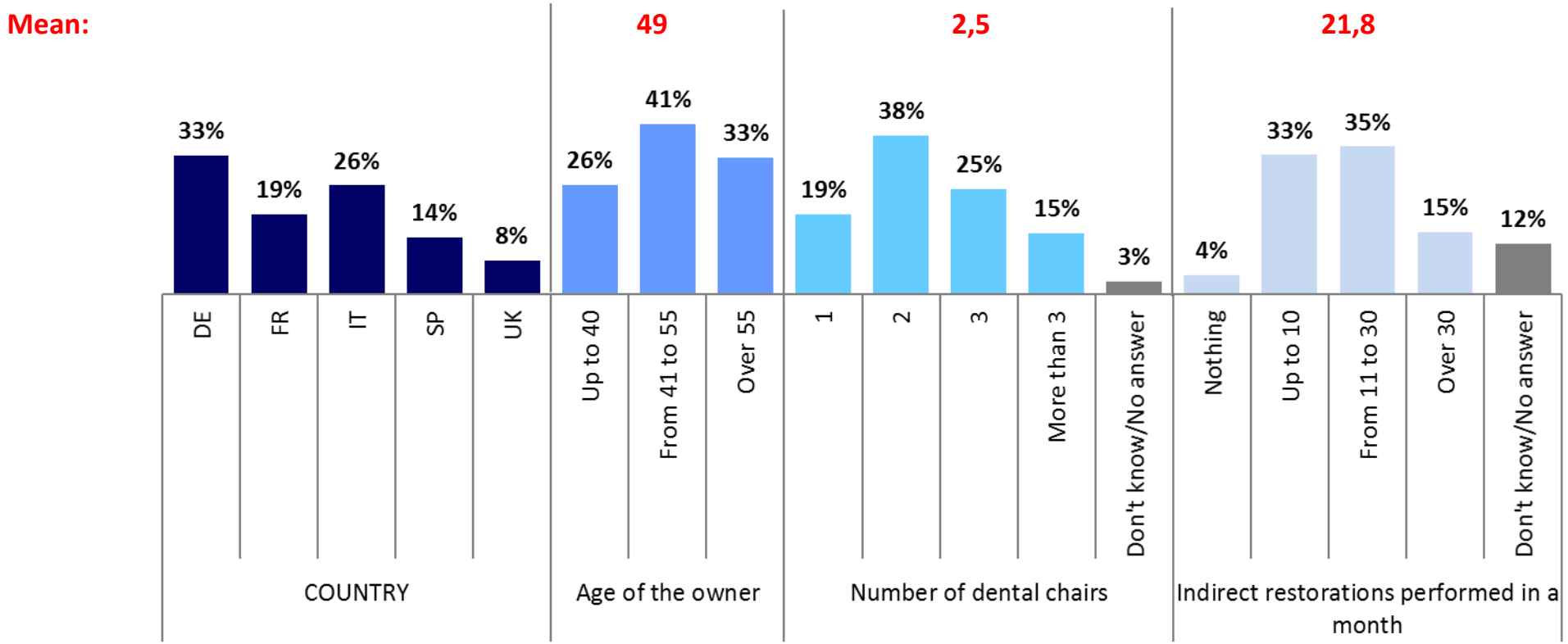
(B)

Country	Weighted Cases	%
Germany	333	33%
France	191	19%
Italy	261	26%
Spain	136	14%
United Kingdom	80	8%
Total	**1.000**	**100%**



(C)

Introduction - Breakdown By Socio Demographic Clusters



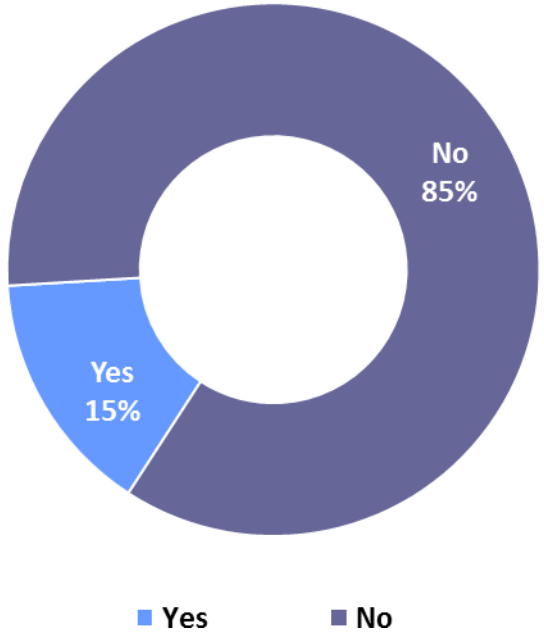
Base: 1000 cases

NOTE
The scenario analysis will be carried out considering the overall sample and some clusters.
COUNTRY: the data are split by each investigated country.
DIGITAL RESTORATION PROVIDER: the data are split by different profiles, as follows.
- **Digital restorations provider**: Yes / No. Yes: all respondents stating to use digital technologies to provide restorations to their clients (even in full outsourcing).
- **TECHNOLOGY**: Chairside milling (respondents stating to use chairside milling unit at their practice); Scanner (respondents stating to use scanner to send scan files outside for milling); Impression (respondents stating to send outside impressions for milling).
- **CHANNEL**: Manuf/Milling center (respondents stating to send impressions and or scan files to a manufacturer/milling center); Partner lab (respondents stating to send impressions and or scan files to a partner lab).

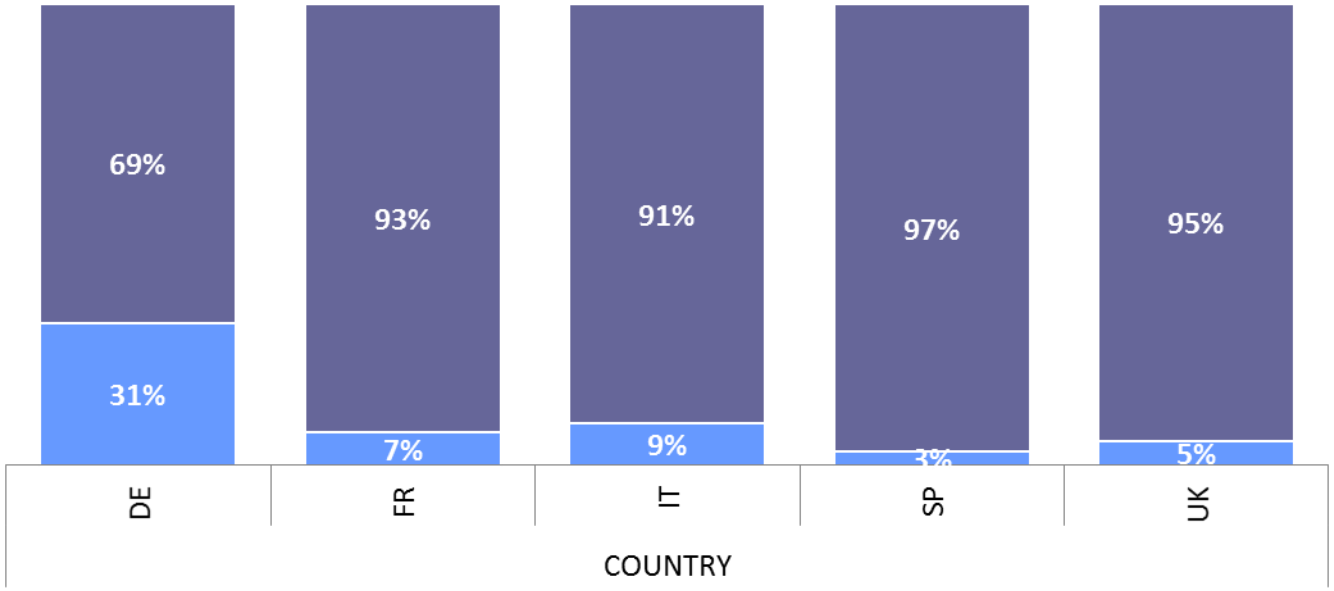
Scenario

Scenario: Number of dental technicians and laboratories

Do you have at least a technician at your practice?



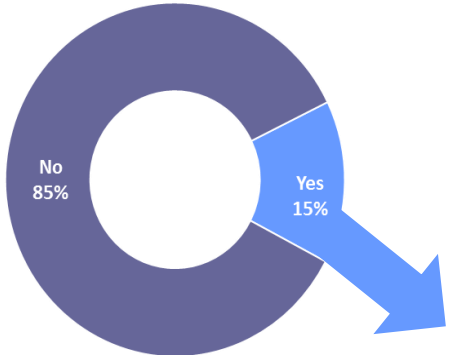
Germany shows a higher penetration of dental practices with technicians.



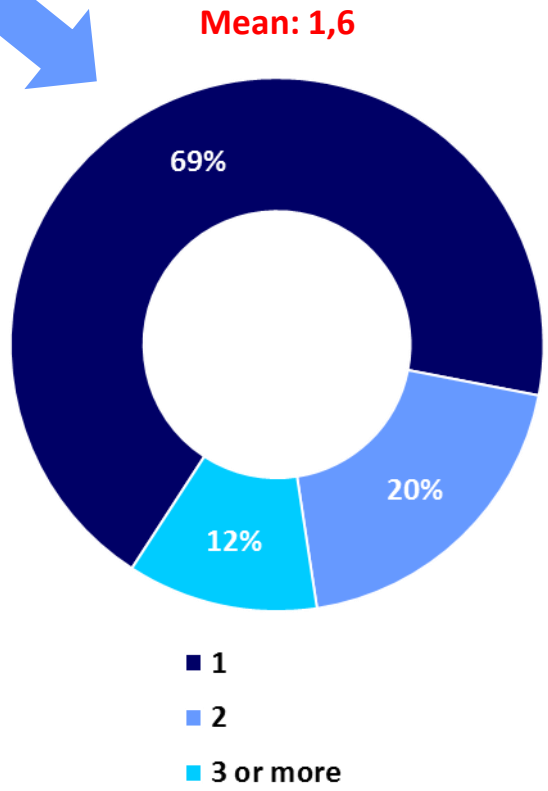
Base: 1000 cases

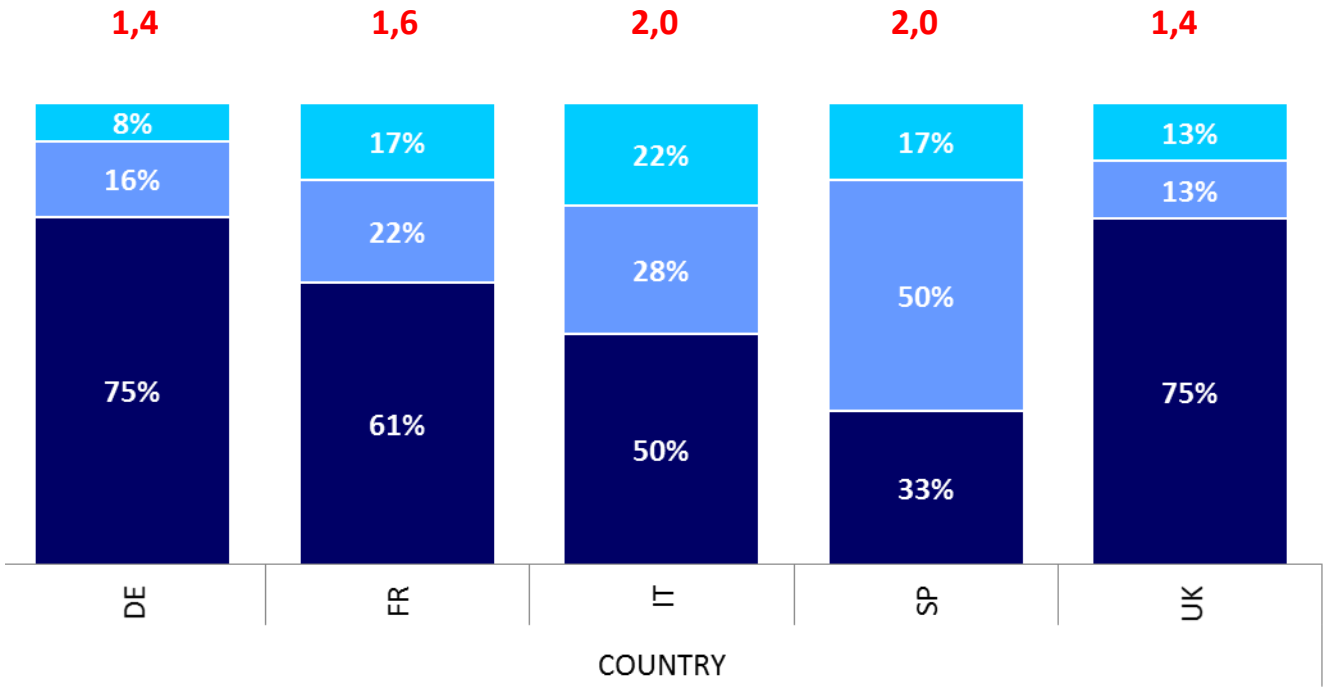
Scenario: Number of dental technicians and laboratories

Do you have at least a technician at your practice? If yes, how many?



It look like Germany has a higher heterogeneity where there's a higher penetration of dental practices with technicians, but where the average number of technicians is lower. Other countries information should be considered as an indication only.

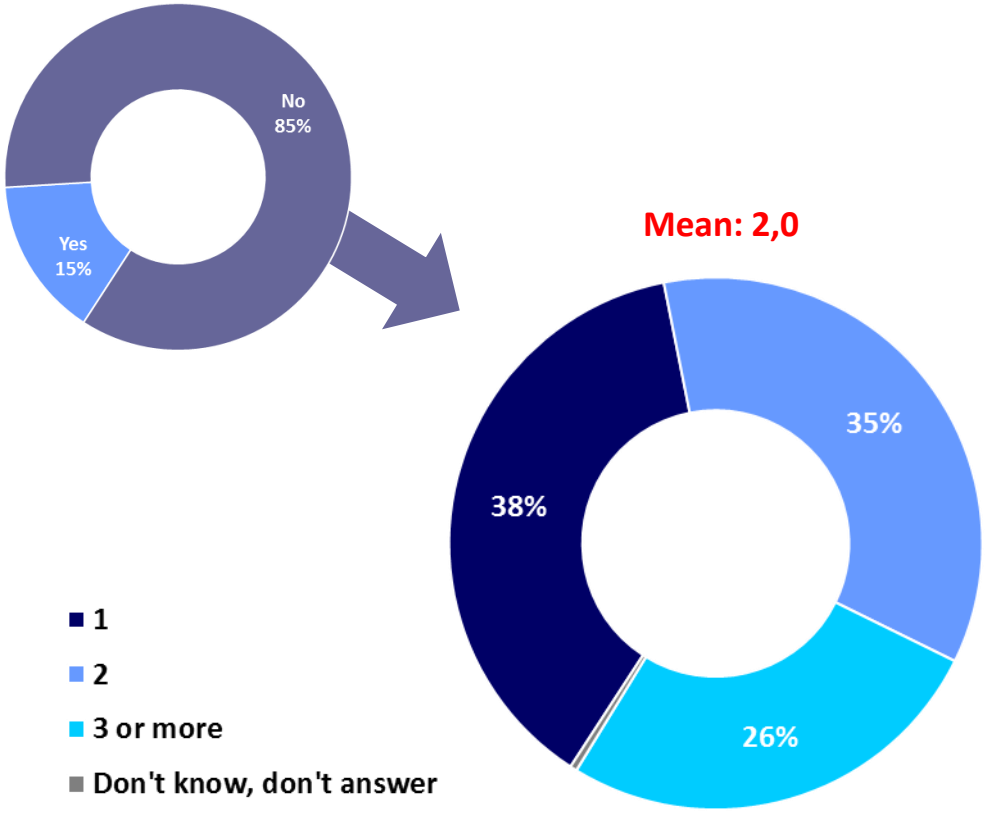




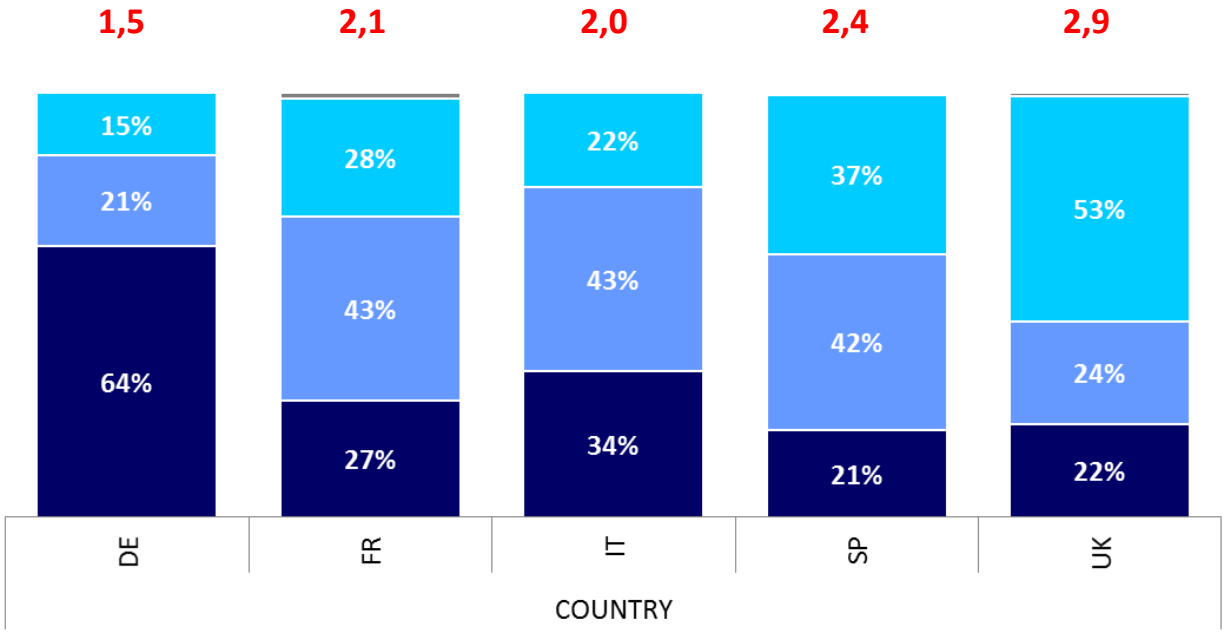
Base: 149 cases

Scenario: Number of dental technicians and laboratories

Do you have at least a technician at your practice? If no, how many laboratories do you cooperate with?



UK and Spain are the countries that tend to be provided by more than one laboratory. This means that the competition between laboratories can be higher in those countries.



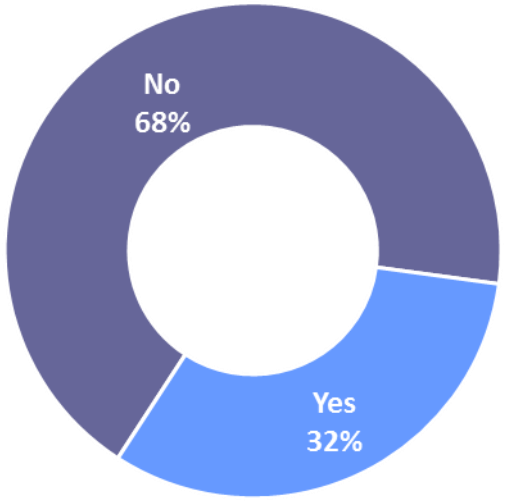
Base: 851 cases

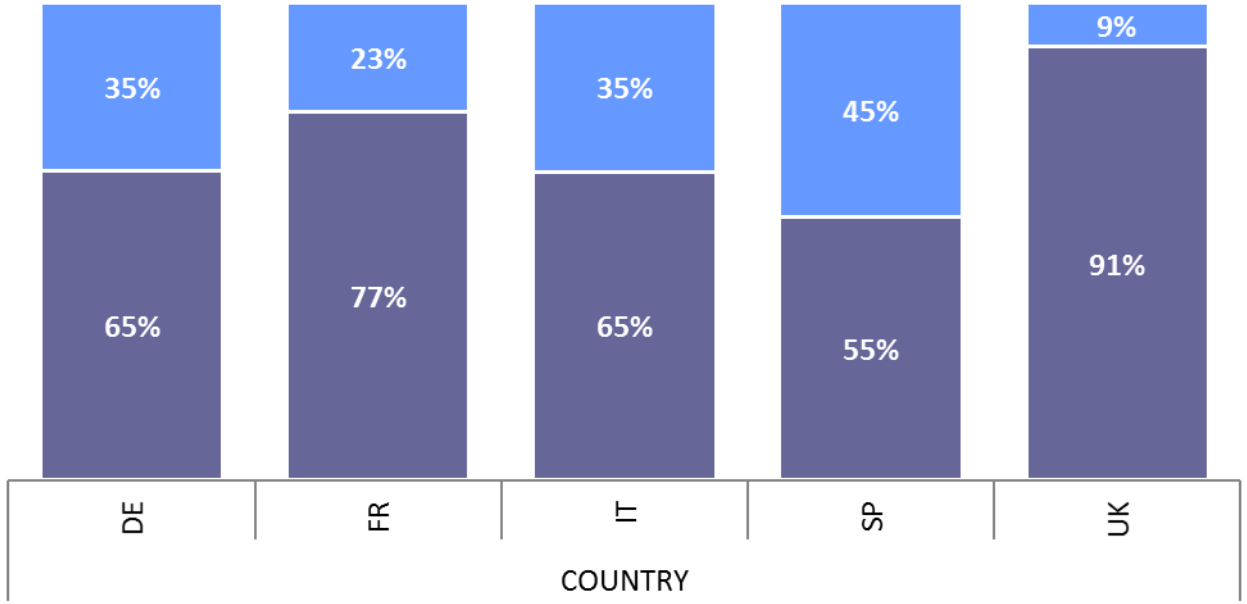
Scenario: Use of Digital technologies in practices

Do you provide your patients with indirect restorations performed with digital technologies?

In comparison to an overall mean of 32%, Spain, Italy and Germany seem to be the countries where digital indirect restorations are performed the most.

UK looks to be an important exception in comparison to the other countries

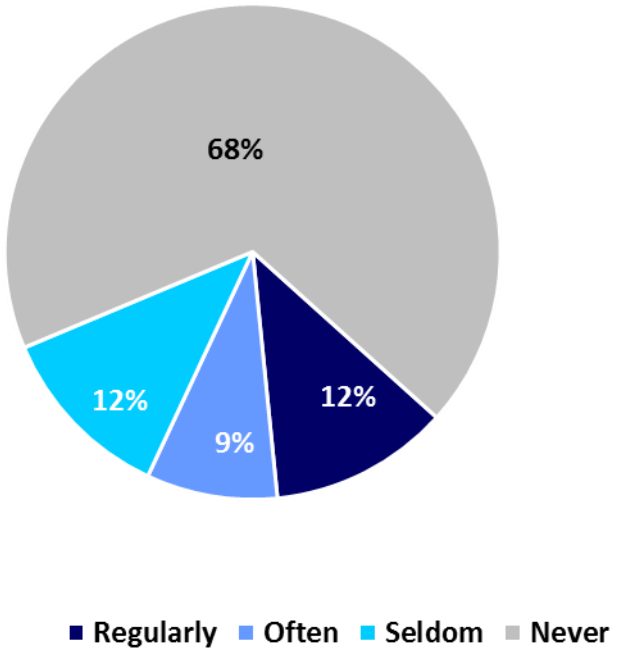


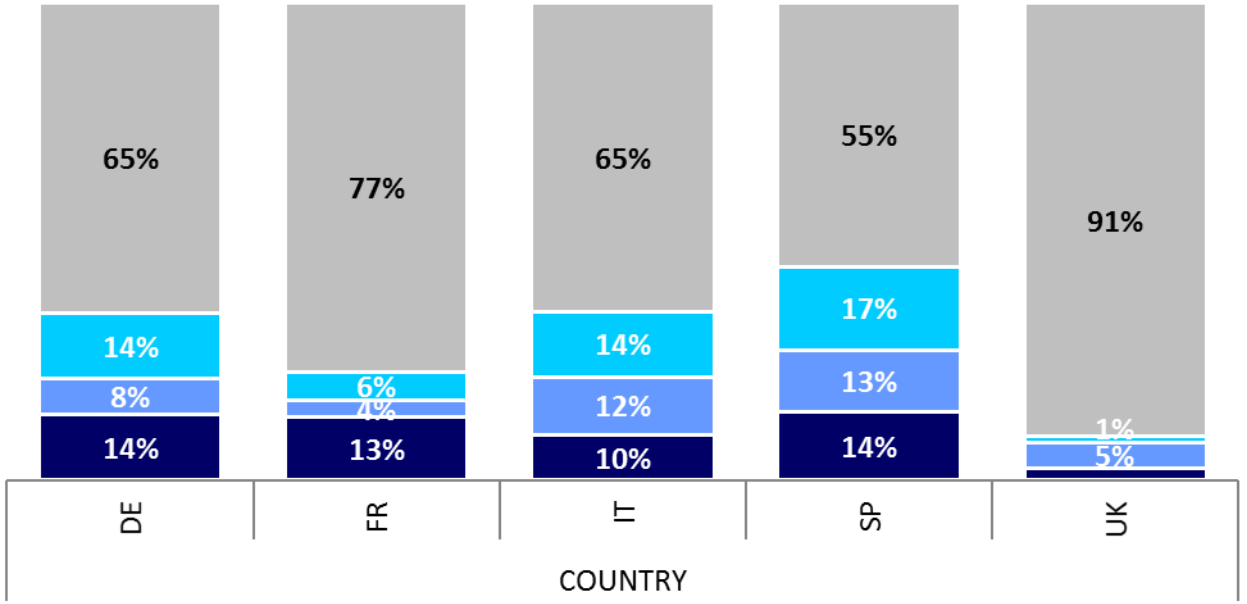


Base: 1000 cases

Scenario: Use of Digital technologies in practices

Do you provide your patients with indirect restorations performed with digital technologies?





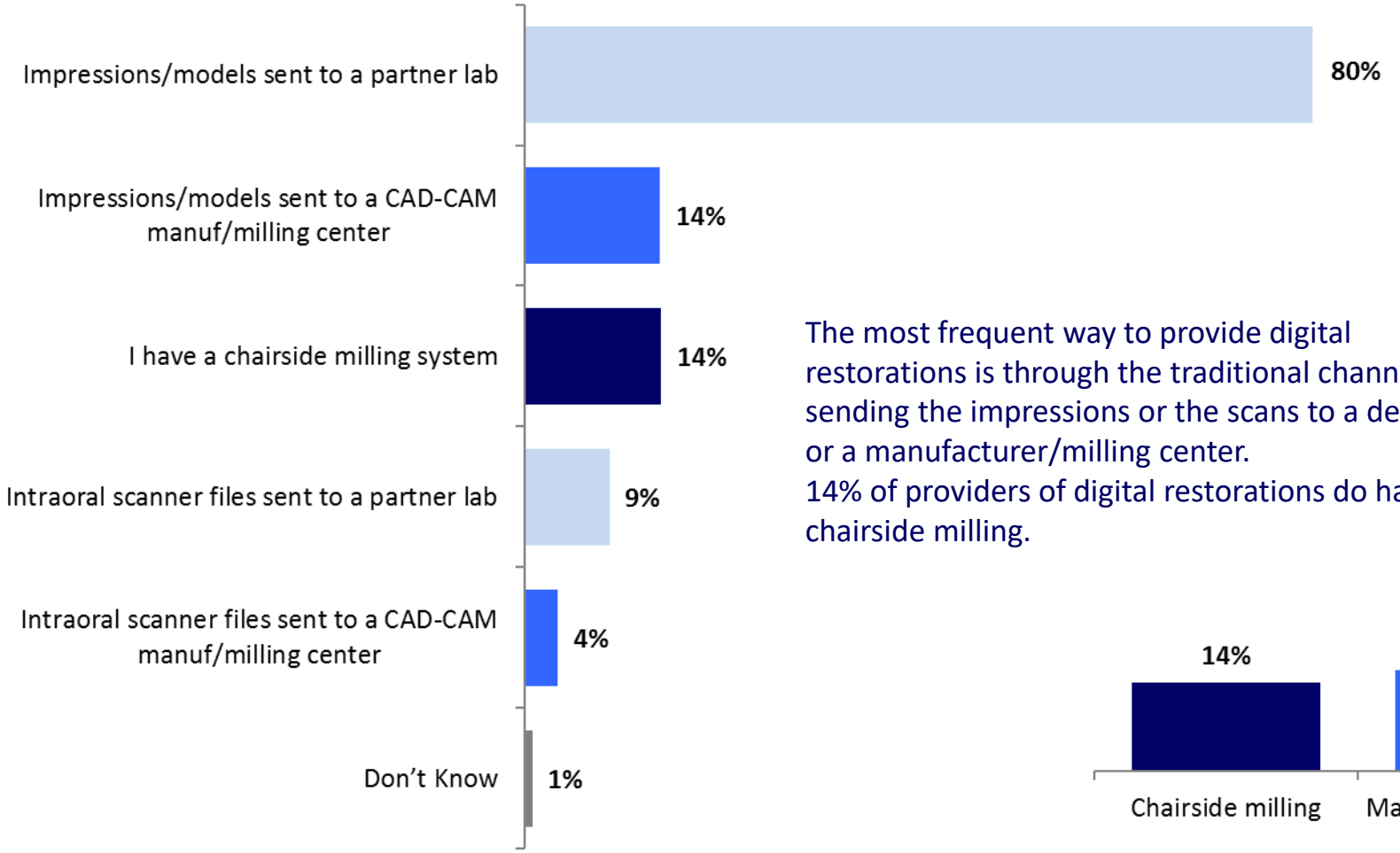
Despite a rather low penetration of the digital technologies France shows one of the highest percentages of regular use of it.

Base: 1000 cases

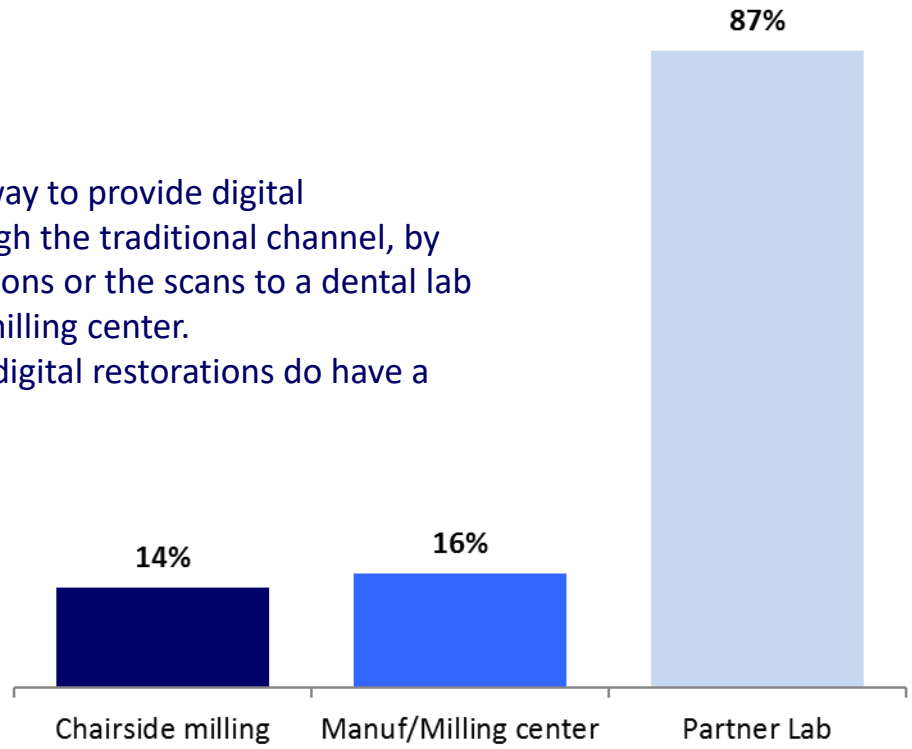
Scenario: Digital technology use - breakdown by channel

How do you provide digital restorations in your practice?

Focus on digital restoration providers



The most frequent way to provide digital restorations is through the traditional channel, by sending the impressions or the scans to a dental lab or a manufacturer/milling center.
14% of providers of digital restorations do have a chairside milling.



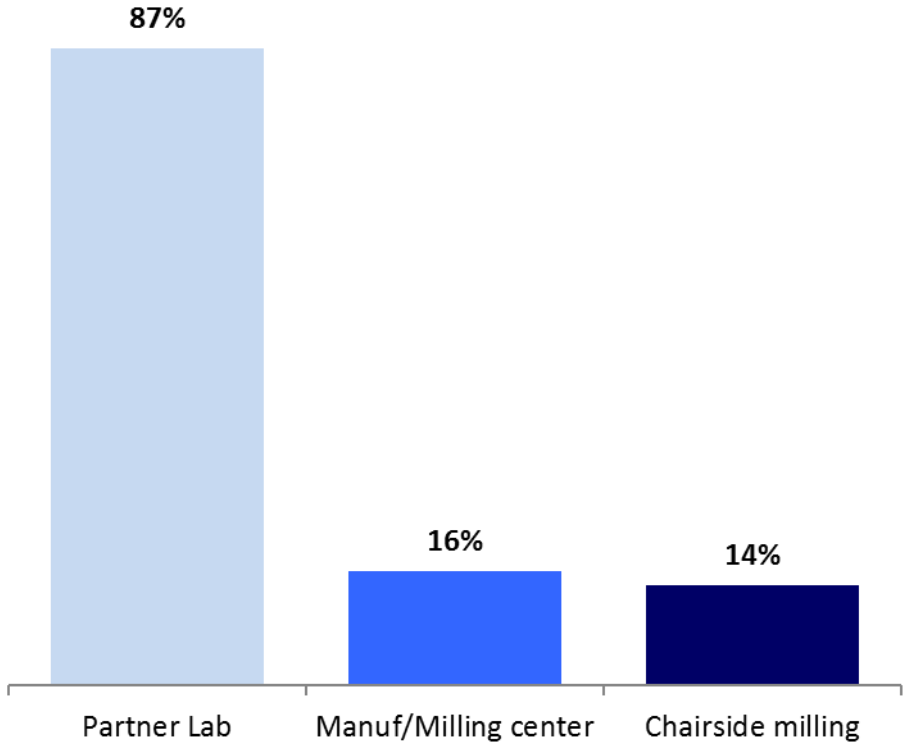
Base: 323 cases

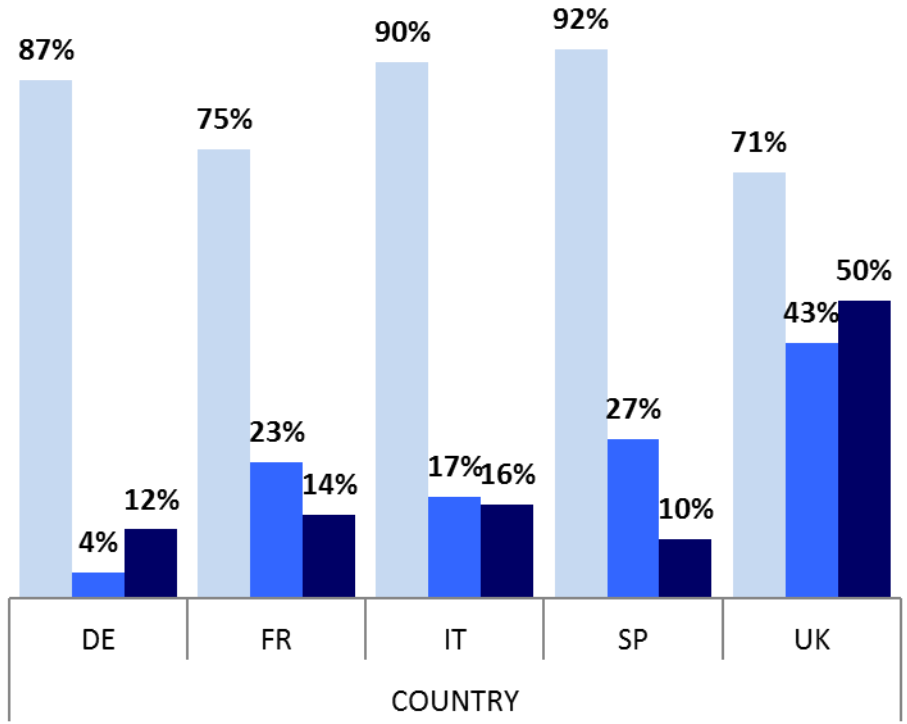
Scenario: Digital technology use - breakdown by channel

How do you provide digital restorations in your practice?

Focus on digital restoration providers

With regard to the analysis by channels, Spain and France show the highest percentages of use of the manufacturer/milling center as the preferred channel, while Italy shows the highest percentage of respondents owning a chairside milling unit. UK should be considered as an indication only, due to the reduced number of cases.



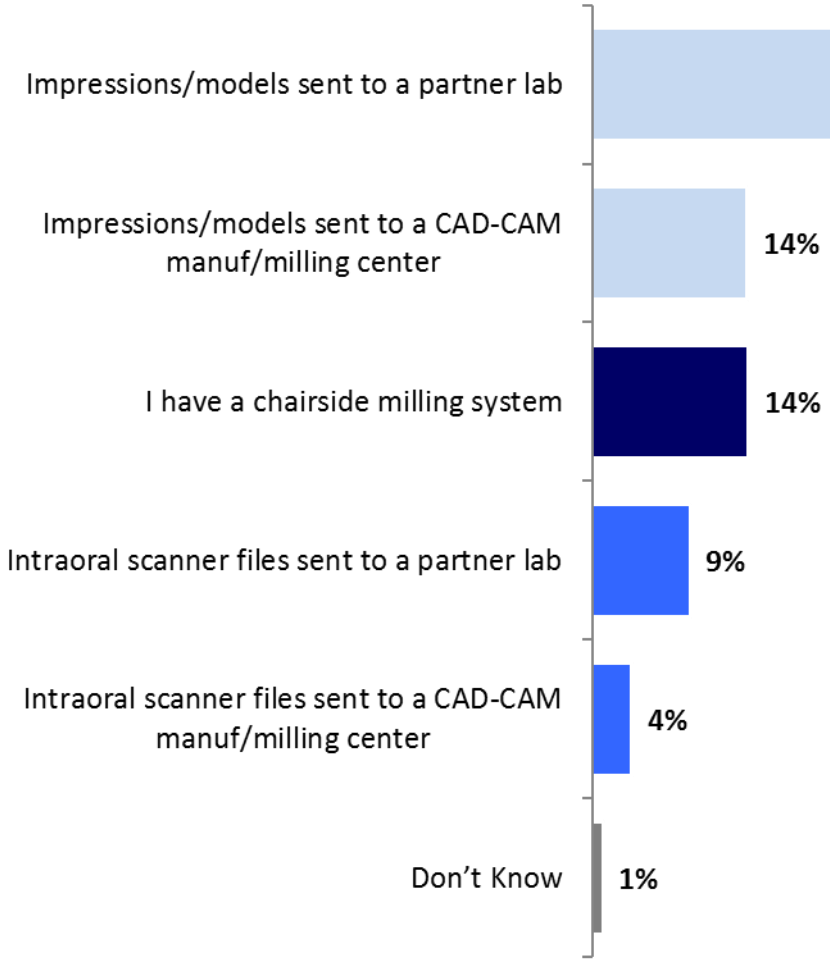


Base: 323 cases

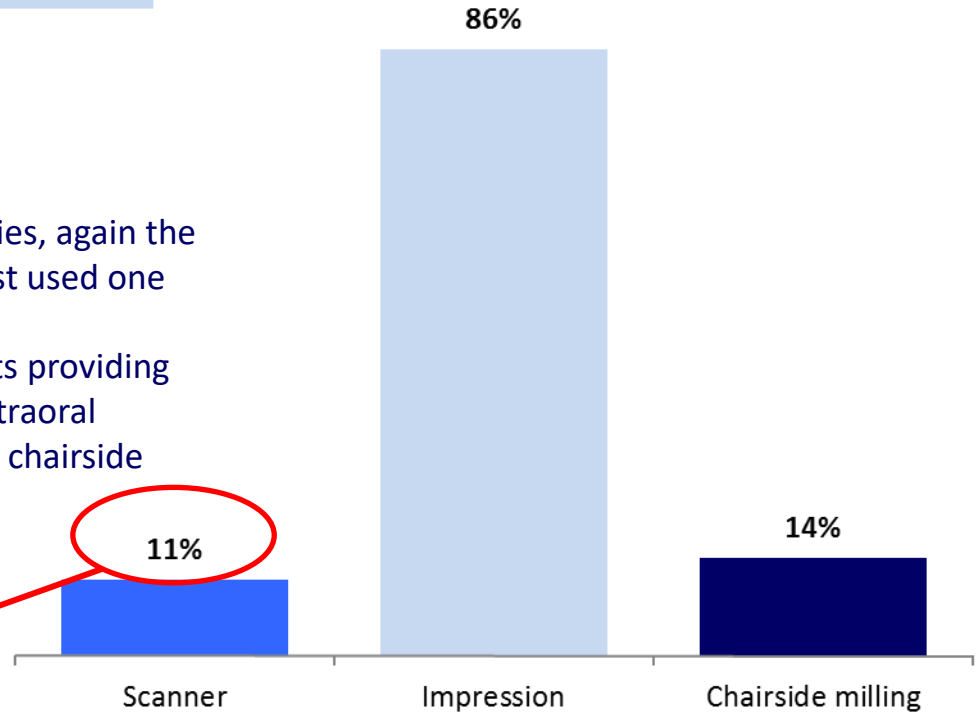
Scenario: Digital technology use - breakdown by technology

How do you provide digital restorations in your practice?

Focus on digital restoration providers



With regard to the technologies, again the traditional method is the most used one (86%).
About 20% of the respondents providing digital technologies use an intraoral scanner, while 14% do have a chairside milling.



11% is the percent of scanner owners, out of the total digital restorations providers, who use the scanner to send the files outside for milling. The total % of scanner owners, including those used with the in-lab milling units, is 20%.

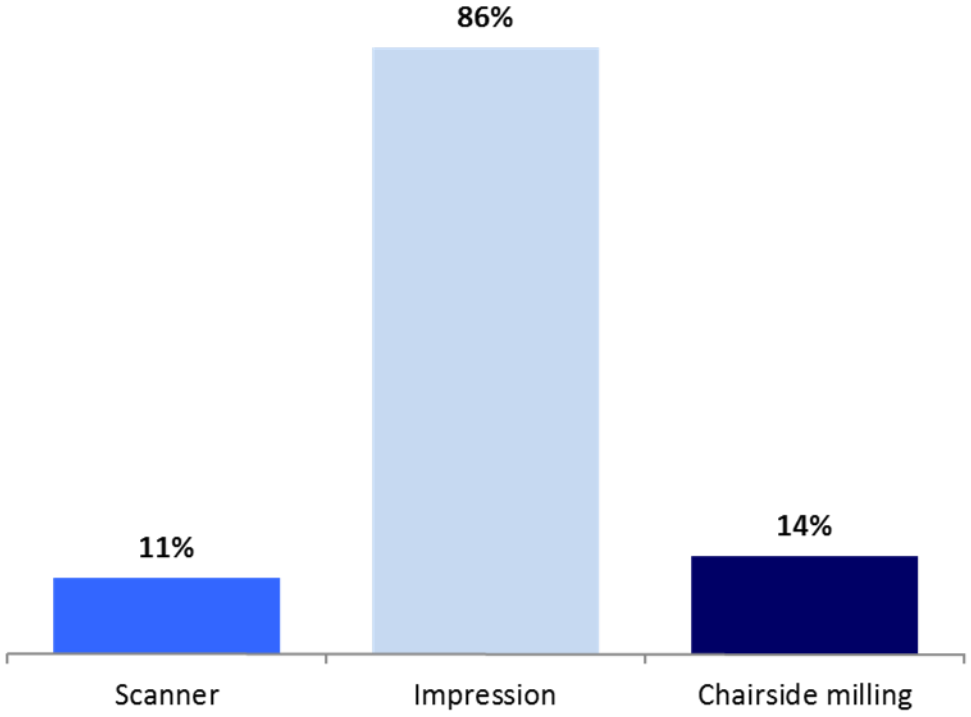
Base: 323 cases

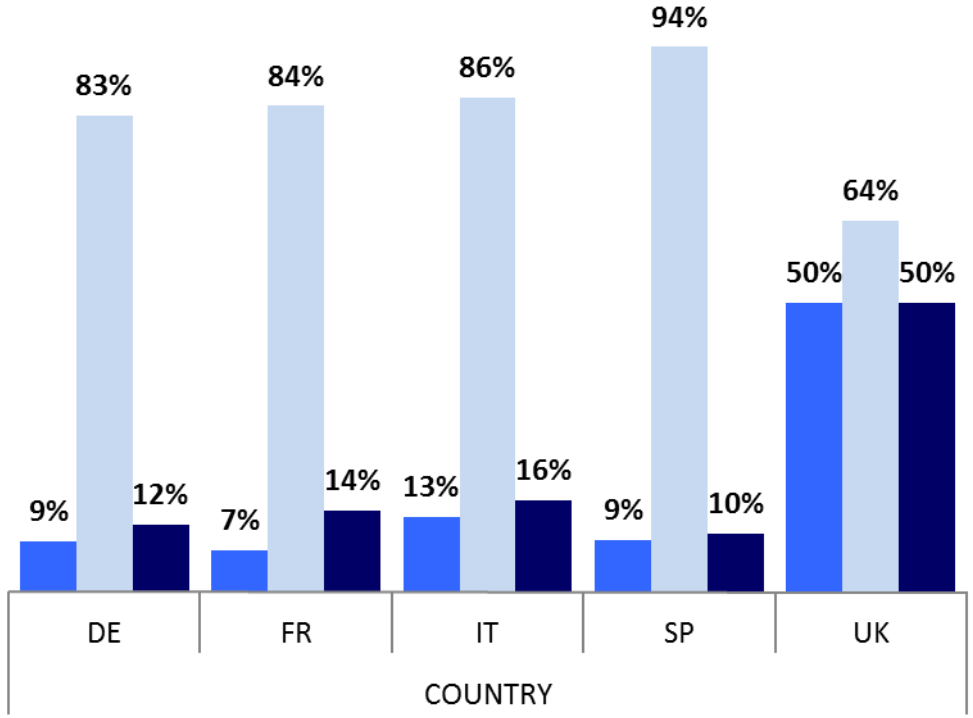
Scenario: Digital technology use - breakdown by technology

How do you provide digital restorations in your practice?

Focus on digital restoration providers

The analysis by country highlights Italy as the country with the highest penetration of intraoral scanners users among digital restorations providers. UK should be considered as an indication only, due to the reduced number of cases.





Base: 323 cases

Scenario: Digital technology use - Channels and technologies

How do you provide digital restorations in your practice?

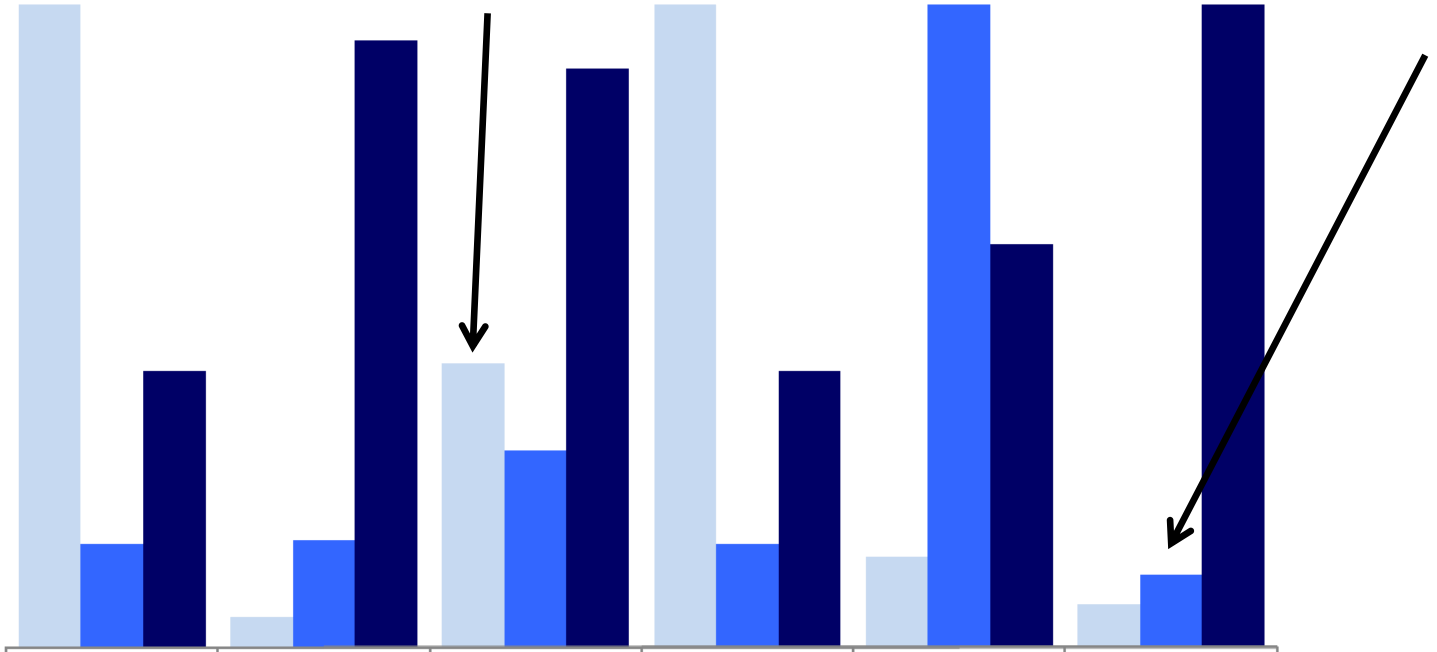
Focus on digital restoration providers

The chart allows to evaluate the percentage of users of different technologies, in comparison with the same technologies and the different channels used.

Please, see the example on the right.

For example, among those using a scanner to send outside the scans, 44% of them also have a chairside milling.

For example, those sending their restorations to a partner lab, in 11% of the cases also send them to a manufacturer/milling center and in 7% of the cases they have a chairside milling.



	Technology			Channel		
	Chairside milling	Impression	Scanner	Chairside milling	Manuf/Milling center	Partner Lab
Partner Lab	43%	94%	90%	43%	63%	100%
Manuf/Milling center	16%	17%	30%	16%	100%	11%
Chairside milling	100%	5%	44%	100%	14%	7%

CHANNELS

Base: 323 cases

Scenario: Digital technology use - Technologies and channels

How do you provide digital restorations in your practice?

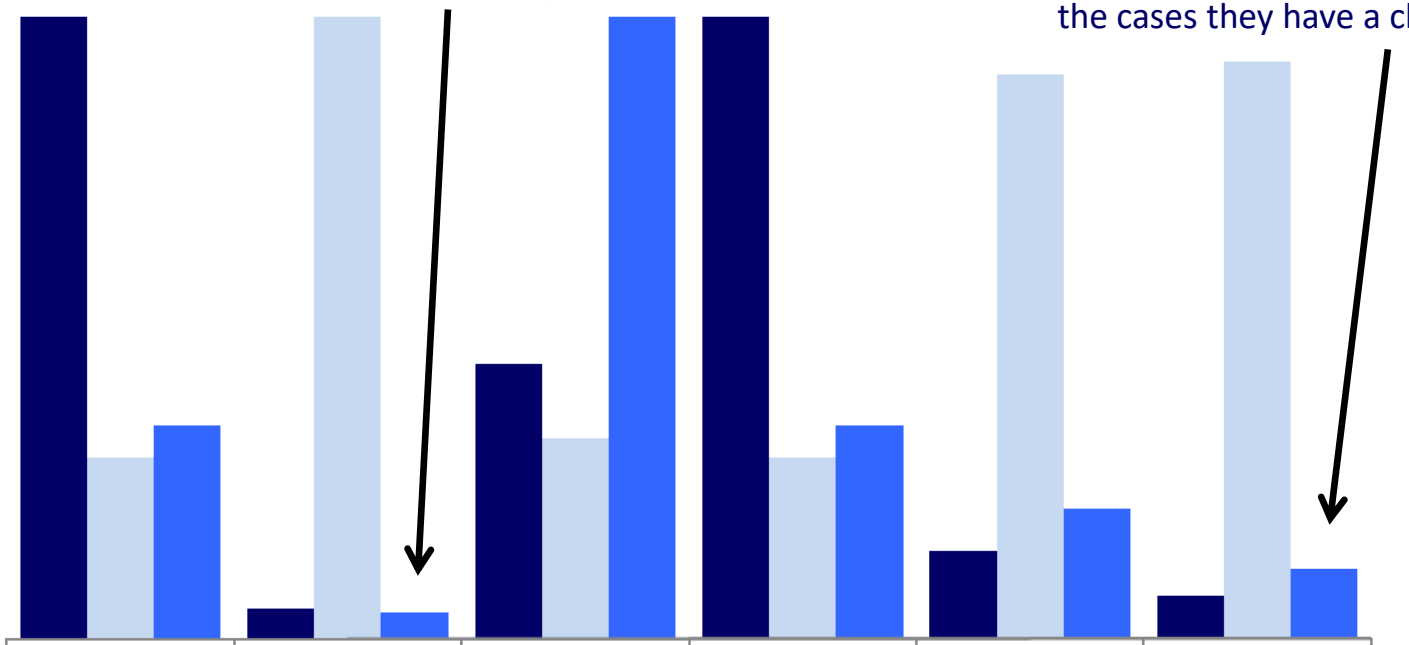
Focus on digital restoration providers

The chart allows to evaluate the percentage of users of different channels, in comparison with the same channels and the different technologies used.

Please, see the example on the right.

For example, among those sending the impressions outside, 4% of them also have a scanner and 5% of them also have a chairside milling.

For example, those sending their restorations to a partner lab in 11% of the cases they also have a scanner and in 7% of the cases they have a chairside milling.



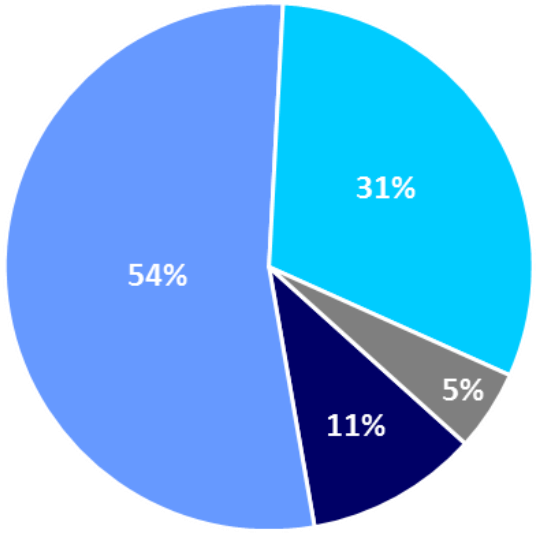
TECHNOLOGIES	Chairside milling	Impression	Scanner	Chairside milling	Manuf/Milling center	Partner Lab
	Technology			Channel		
Scanner	34%	4%	100%	34%	21%	11%
Impression	29%	100%	32%	29%	91%	93%
Chairside milling	100%	5%	44%	100%	14%	7%

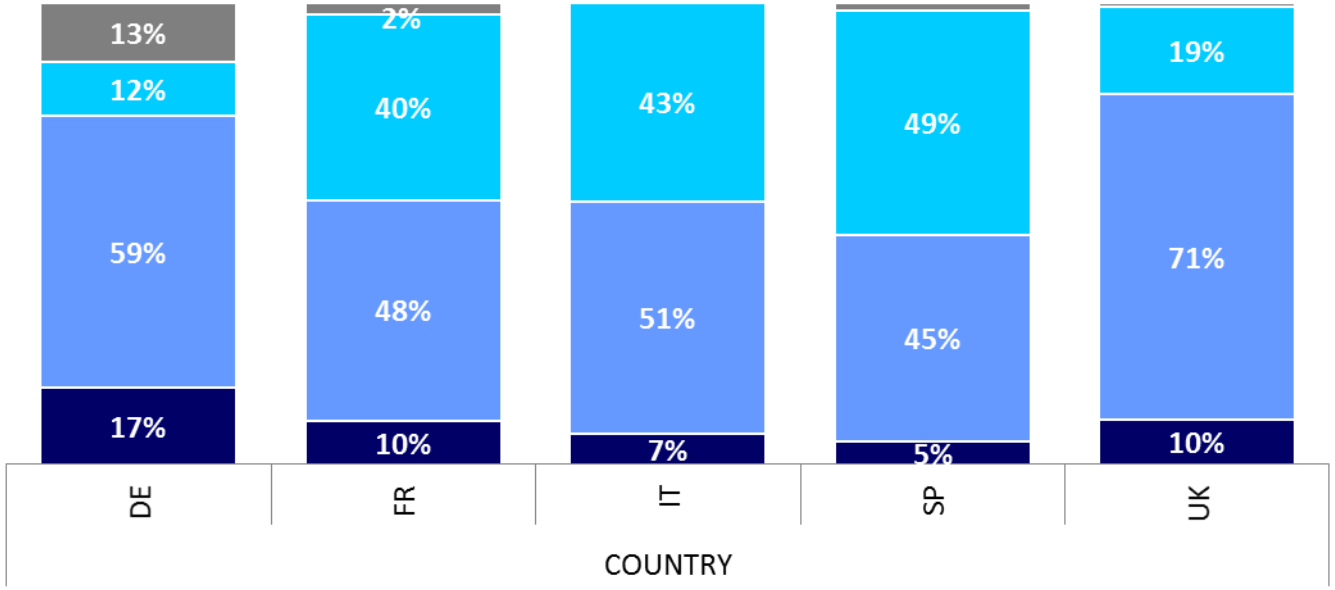
Base: 323 cases

Scenario: Role of digital technologies on prosthetics in the future

How do you feel the new digital technologies (CAD-CAM and 3D printing) will affect the way the prosthetics is carried out in your country?

It's interesting to note how the majority of respondents declared the new digital technologies will play an important role but they will not replace the way the traditional restorations are performed. The highest percentage of respondents stating that digital technologies will replace the traditional restorations is in Spain and Italy, followed by France.





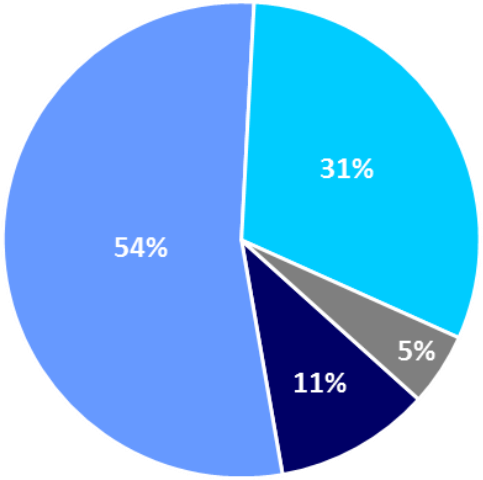
- *They will not play an important role because digital technologies will affect a limited part of the prosthetics*
- *They will play an important role but I feel the traditional prosthetics will continue to be relevant in the future*
- *Digital technologies will replace most of the traditional prosthetics*
- *Don't know*

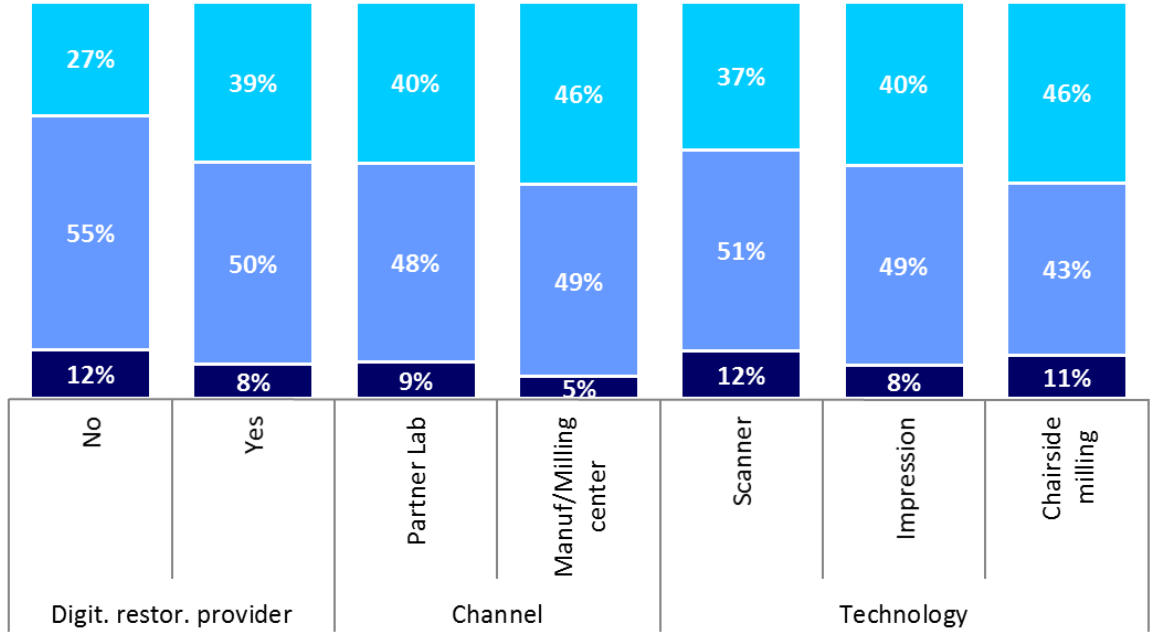
Base: 1000 cases

Scenario: Role of digital technologies on prosthetics in the future

How do you feel the new digital technologies (CAD-CAM and 3D printing) will affect the way the prosthetics is carried out in your country?

In the analysis by respondents profiles, the only relevant difference is between the digital restorations providers and the rest of the sample.
The latter ones show the lowest percentage regarding digital technologies that will completely replace the traditional prosthetics.





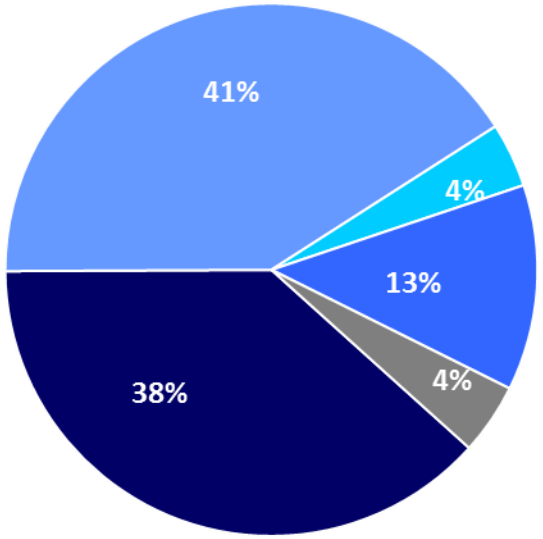
- *They will not play an important role because digital technologies will affect a limited part of the prosthetics*
- *They will play an important role but I feel the traditional prosthetics will continue to be relevant in the future*
- *Digital technologies will replace most of the traditional prosthetics*
- *Don't know*

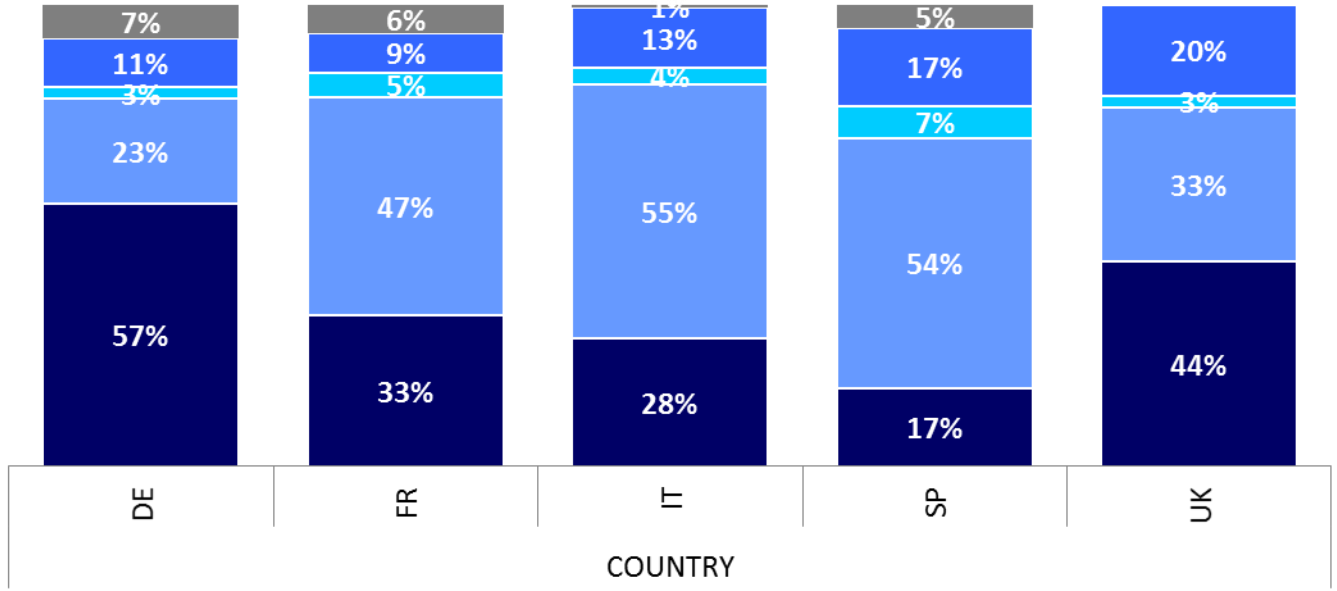
Base: 1000 cases

Scenario: Stance versus digital technologies

What is your stance versus the digital technologies?

The sample is rather split between those trying to get closer to digital technologies and those feeling uncomfortable with them.
The percentage of respondents using it and feeling comfortable with it, still are the minority at 13%. The highest percentages are in Italy, Spain and UK.





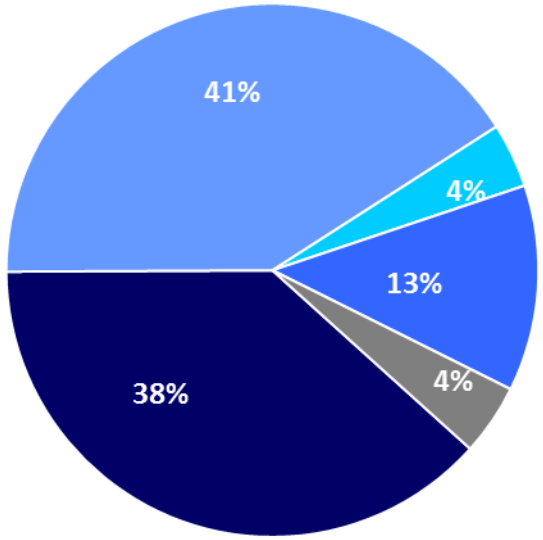
- *I feel uncomfortable and rather far from them*
- *I am getting closer to them because I think they are the future of prosthetics*
- *I am using digital technologies because I need, but I am not comfortable with it*
- *I am using digital technologies and I am comfortable with it*
- *Don't know*

Base: 1000 cases

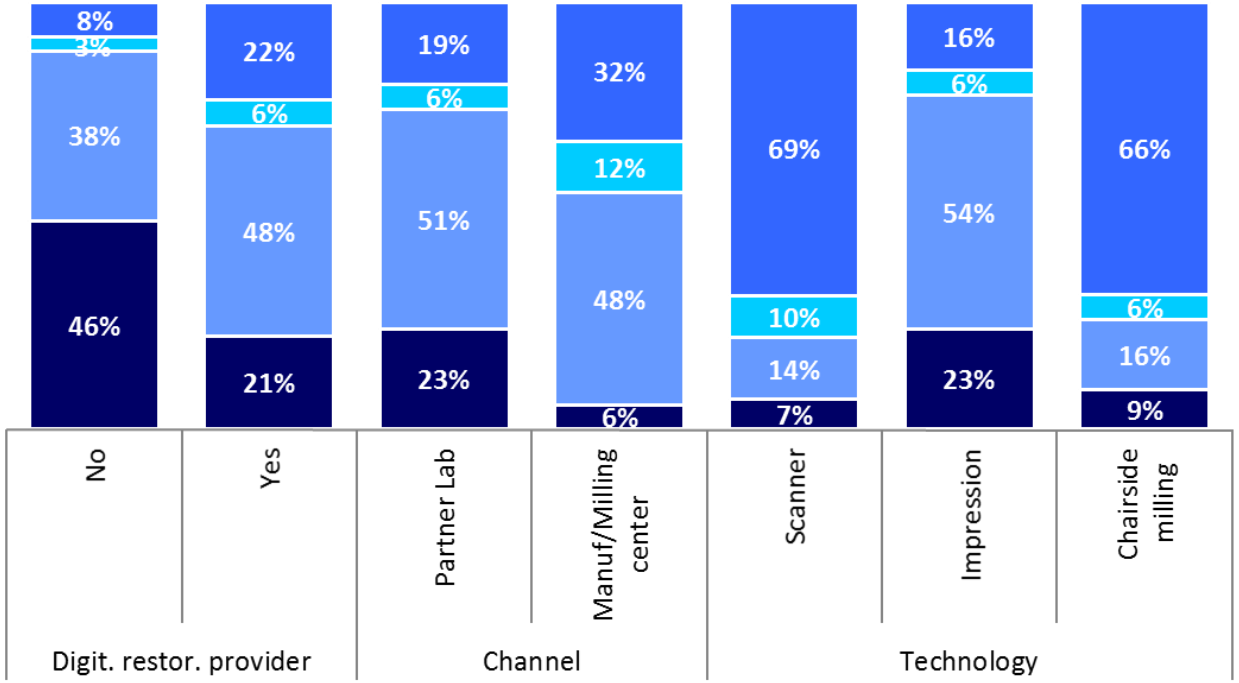
Scenario: Stance versus digital technologies

What is your stance versus the digital technologies?

It's quite normal to find the respondents using a milling center to be perfectly accustomed to digital technologies, while the highest percentage of respondents feeling uncomfortable with them is related to respondents sending out their impression to third parties.



- *I feel uncomfortable and rather far from them*
- *I am getting closer to them because I think they are the future of prosthetics*
- *I am using digital technologies because I need, but I am not comfortable with it*
- *I am using digital technologies and I am comfortable with it*
- *Don't know*

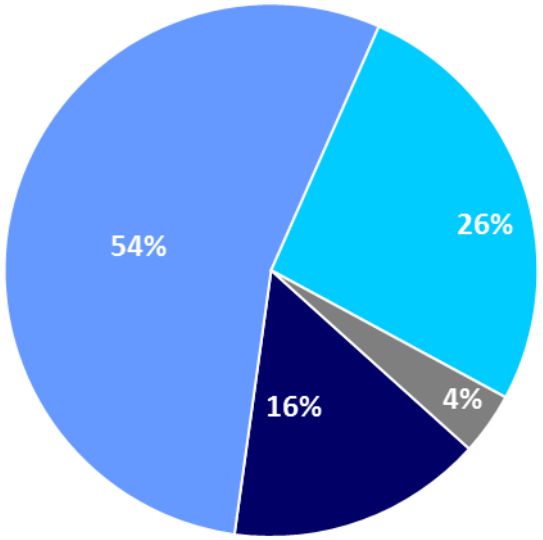


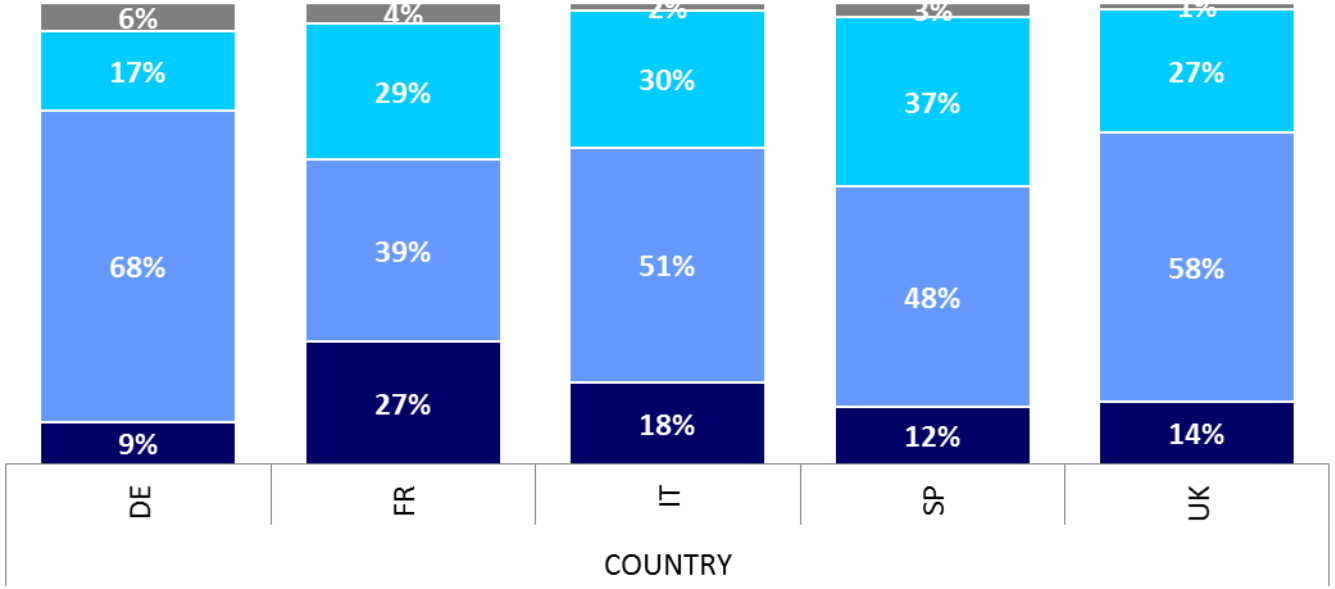
Base: 1000 cases

Scenario: Role of dentists and technicians in the future

How do you think dentists and technicians role will change with the new digital technologies?

About the future role of dentists and technicians in the new digital era, the majority of respondents is convinced that the cooperation will become tighter because of the high expertise of the technicians. The highest percentages are in Germany and UK.



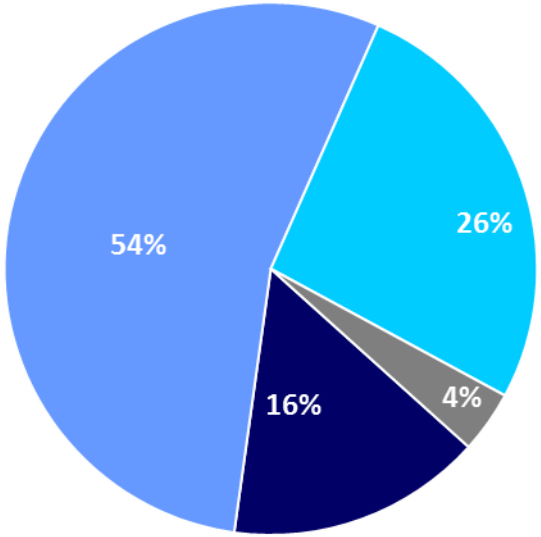


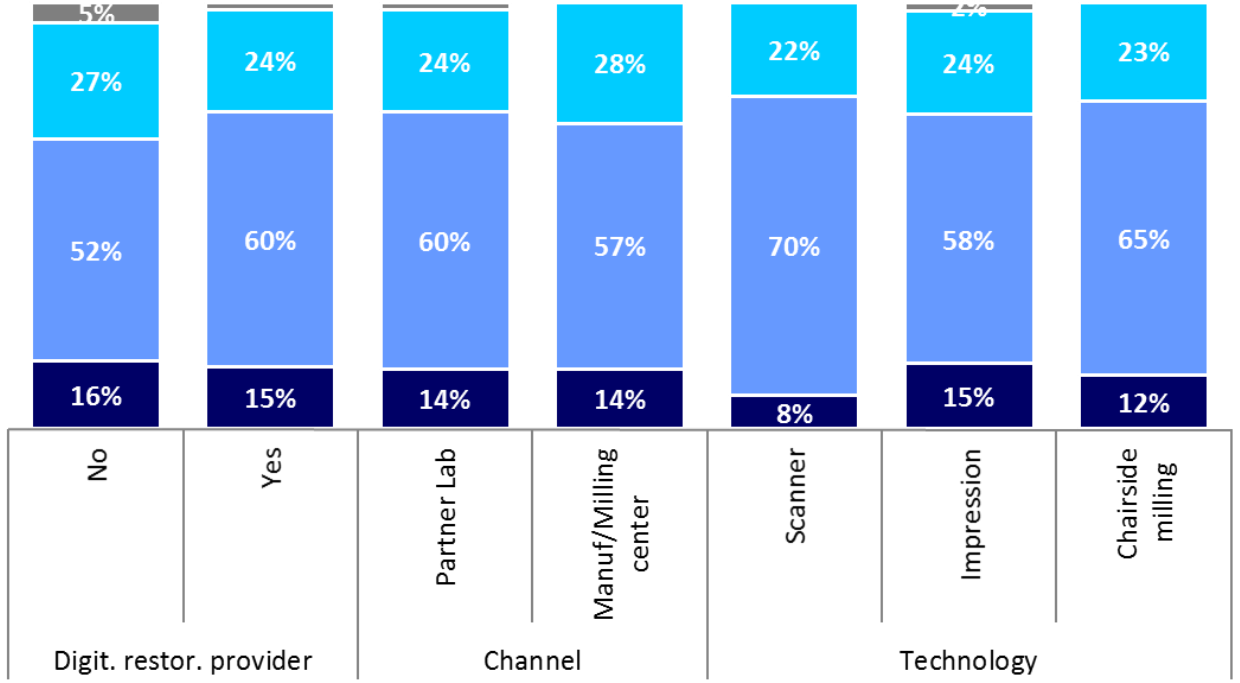
- *There will not be any change at all, because everyone will always have its own distinct role*
- *The cooperation between dentists and technicians will increase because the knowledge of the technician in prosthetics materials, esthetics and digital processing are important*
- *The dentists will need to get more expertise about prosthetics, because they will be required to perform part of the work in charge of technicians*
- *Don't know*

Scenario: Role of dentists and technicians in the future

How do you think dentists and technicians role will change with the new digital technologies?

The same feeling is widespread among the profiles analysed in this slide, where there are no relevant difference about this topic. On the other hand, it's quite clear that dentists will need to get more expertise, due to the fact that they will be asked to perform part of the workflow currently performed by the technicians.





- *There will not be any change at all, because everyone will always have its own distinct role*
- *The cooperation between dentists and technicians will increase because the knowledge of the technician in prosthetics materials, esthetics and digital processing are important*
- *The dentists will need to get more expertise about prosthetics, because they will be required to perform part of the work in charge of technicians*
- *Don't know*

OMNIVISION digital

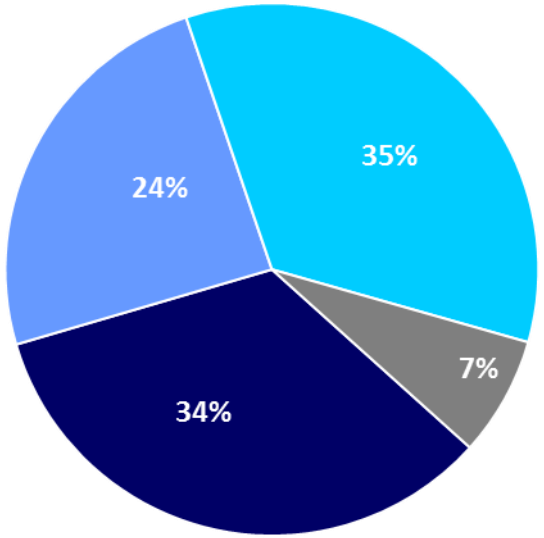
Base: 1000 cases

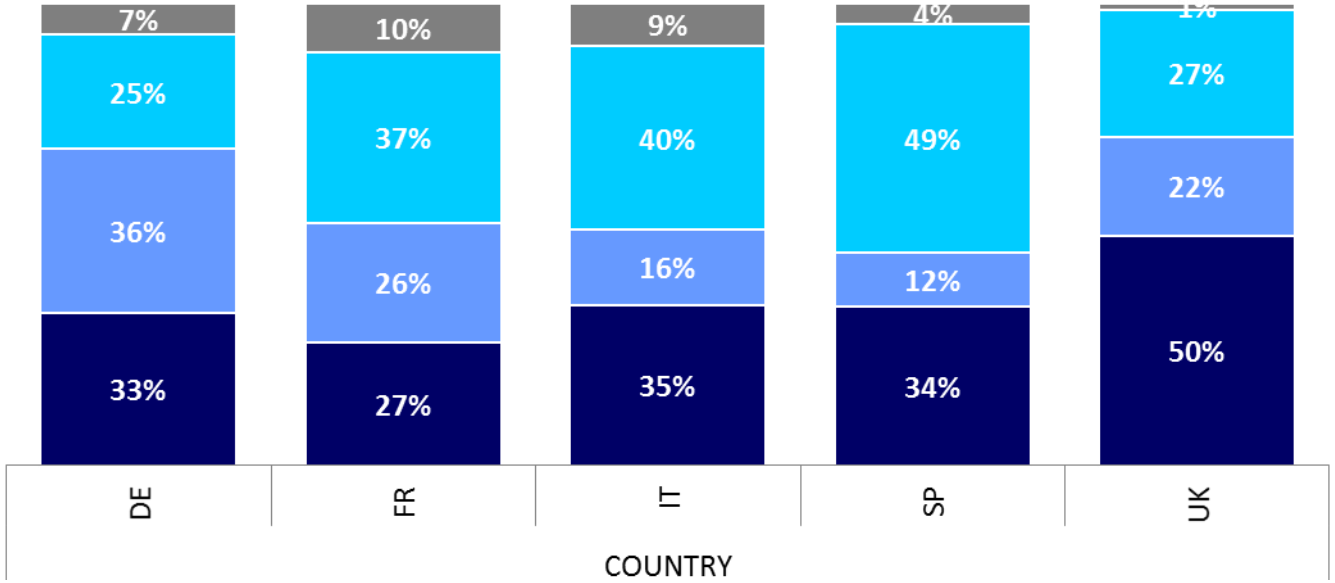
KEY-STONE

Scenario: Change in the relationship among dentists, technicians, industry

How do you think the relationship between dentists and technicians and the industry will change with the new digital technologies?

The major part of the quotes are in the direction of a tighter cooperation between dentists and technicians and between dentists and the industry, due to the increasing need for specific manufactured products that the manufacturers can provide. This stance is rather even among countries, with Spain showing a higher feeling about the increase in the cooperation between dentists and the industry.



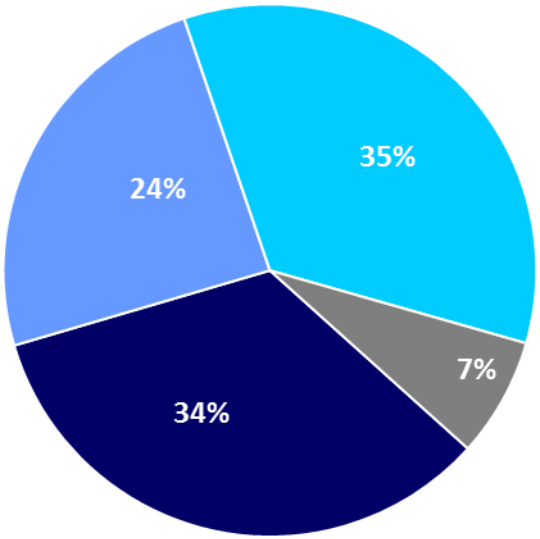


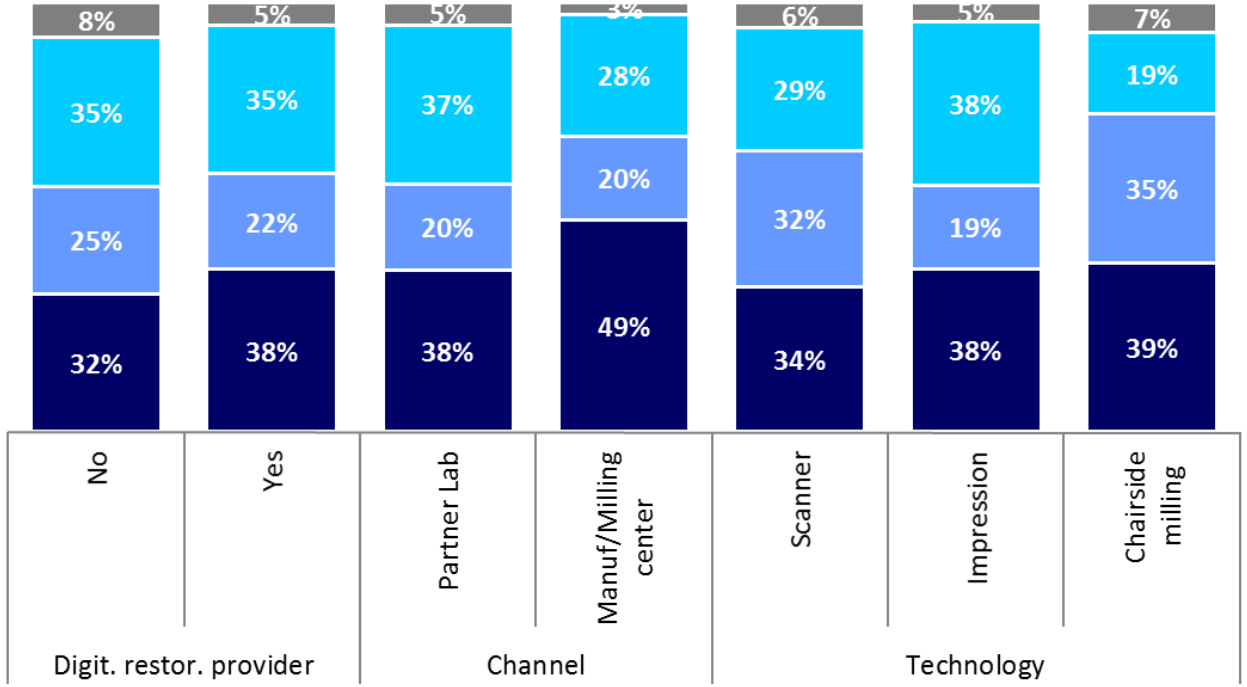
- *The relationship will become tighter because of the high specialization of technicians on prosthetics and CAD processing*
- *The relationship will become blander because the CAD processing will be even easier and it does not require specific expertise from the dentists*
- *The relationship with the industry will become tighter because of the need for case specific manufactured products and services*
- *Don't know*

Base: 1000 cases

Scenario: Change in the relationship among dentists, technicians, industry

How do you think the relationship between dentists and technicians and the industry will change with the new digital technologies?





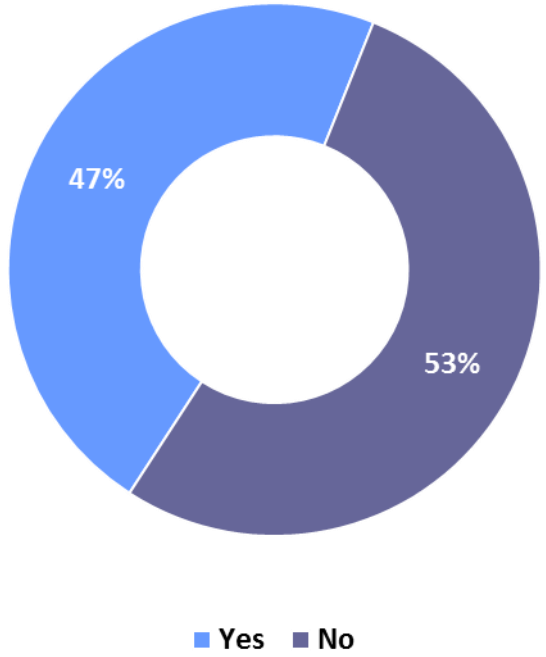
- *The relationship will become tighter because of the high specialization of technicians on prosthetics and CAD processing*
- *The relationship will become blander because the CAD processing will be even easier and it does not require specific expertise from the dentists*
- *The relationship with the industry will become tighter because of the need for case specific manufactured products and services*
- *Don't know*

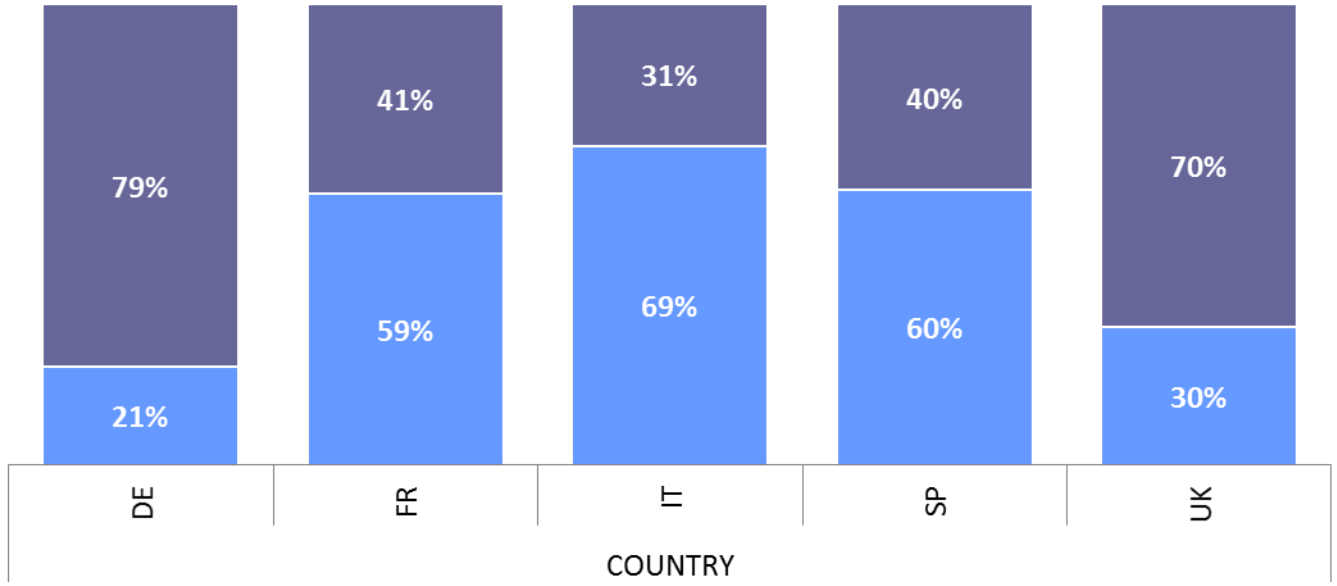
Base: 1000 cases

Scenario: Change in the way restorations are performed

In your opinion, does the use of the digital technology change the type of restorations?

The sample is rather split evenly between those feeling the type of restorations will not change, and those thinking that there will be a change. The major differences come from Germany and UK, where there are the major part of respondents stating there will be no change.



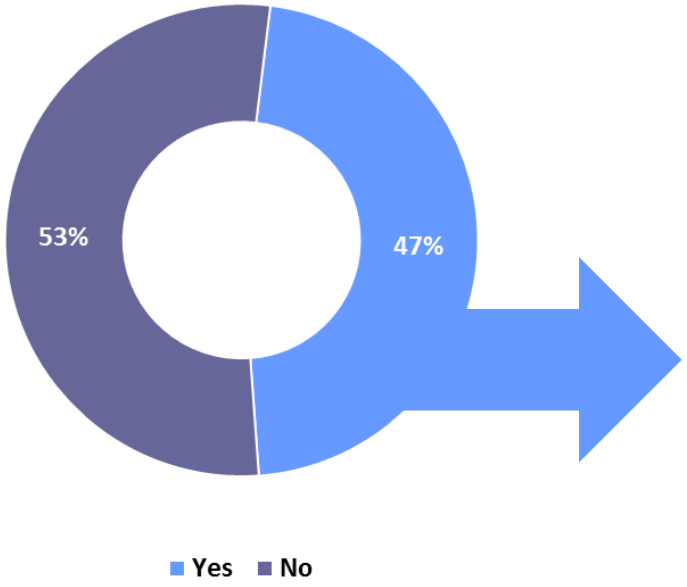


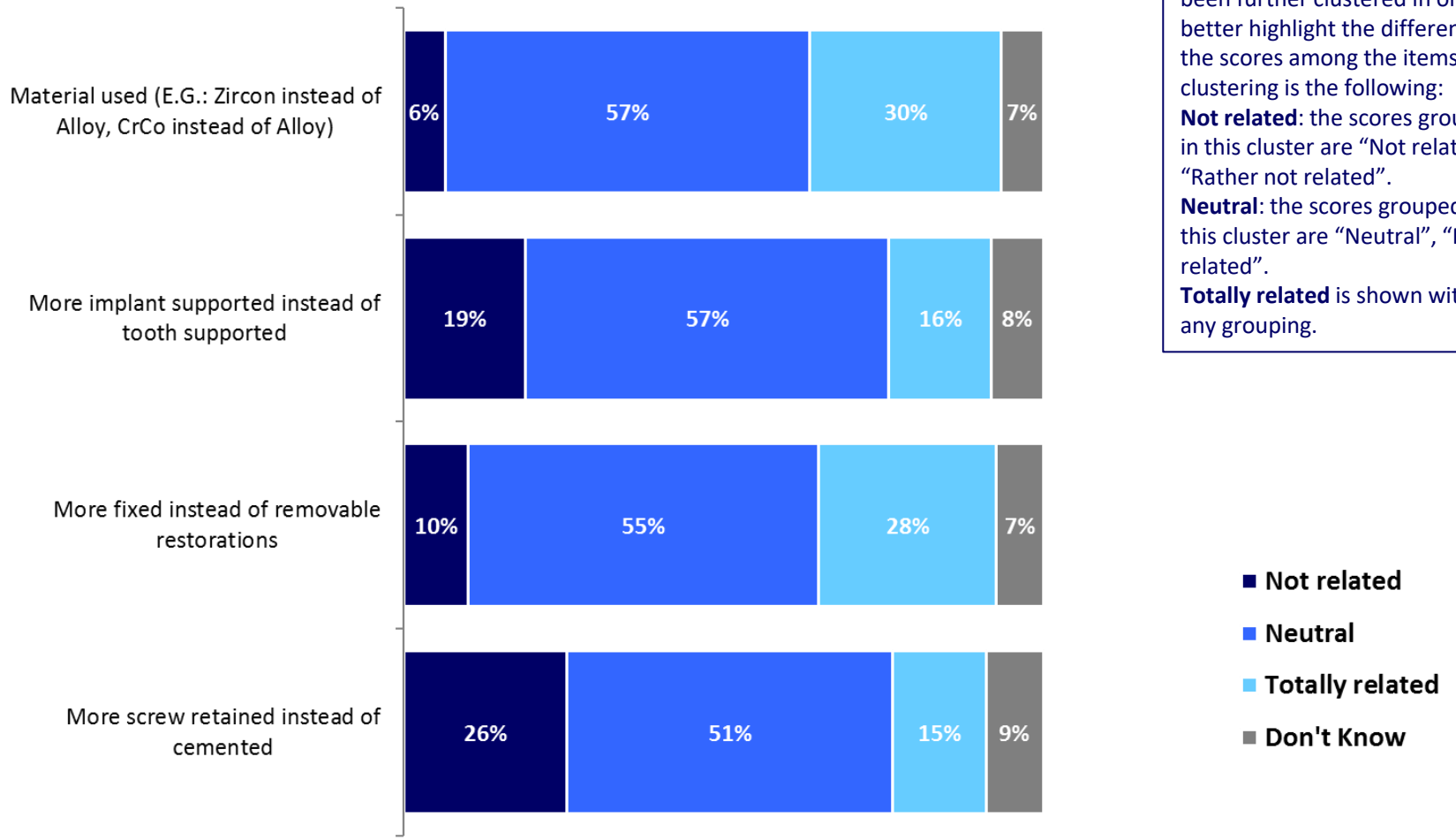
Base: 1000 cases

Scenario: Change in the way restorations are performed

In your opinion, does the use of the digital technology change the type of restorations? If yes , which way? Please, answer with (Not related, Rather not related, Neutral, Rather related, Totally related) to the following statements.

The changes are mostly related the increased use of aesthetic materials and the increase of fixed prosthetics versus the mobile prosthetics.



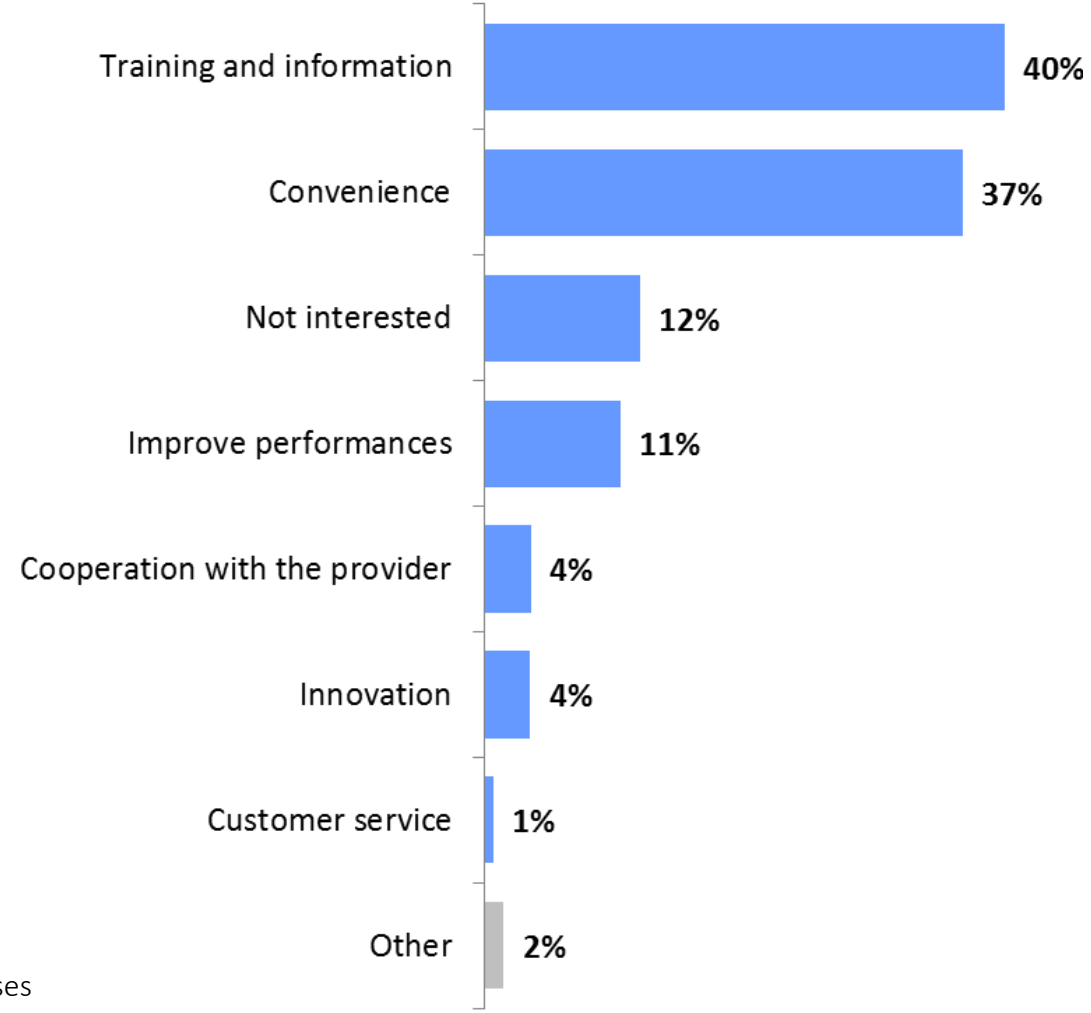


NOTE
The 5 possible answers have been further clustered in order to better highlight the differences in the scores among the items. The clustering is the following:
Not related: the scores grouped in this cluster are "Not related", "Rather not related".
Neutral: the scores grouped in this cluster are "Neutral", "Rather related".
Totally related is shown without any grouping.

Base: 469 cases

Scenario: Required features from digital technology providers

What should your digital technology provider offer you, to improve and enhance the way you perform restorations and prosthetics in your practice?



Base: 758 cases

A provider will clearly need to give support to the users of the digital technology, in terms of training and information.
Frequently mentioned is also Convenience.
About 12% of respondents look for improved performances and again with 4% there is an item related to the support from the provider.
It looks like two main drivers are present: convenience, also considering a return on investment and support (training and information).

Processing without “don't know”

Scenario: Required features from digital technology providers

What should your digital technology provider offer you, to improve and enhance the way you perform restorations and prosthetics in your practice?

TOTAL		DE		FR		IT	
Training and information	40%	Training and information	49%	Convenience	30%	Training and information	34%
Convenience	37%	Convenience	45%	Training and information	24%	Convenience	27%
Not interested	12%	Not interested	10%	Not interested	24%	Improve performances	15%
Improve performances	11%	Improve performances	4%	Improve performances	16%	Not interested	14%
Cooperation with the provider	4%	Cooperation with the provider	1%	Innovation	3%	Cooperation with the provider	10%
Innovation	4%	Innovation	1%	Cooperation with the provider	2%	Innovation	5%
Customer service	1%	Customer service	0%	Customer service	1%	Customer service	2%
Other	2%	Other	1%	Other	4%	Other	2%
Total	**758**	**Total**	**275**	**Total**	**88**	**Total**	**222**

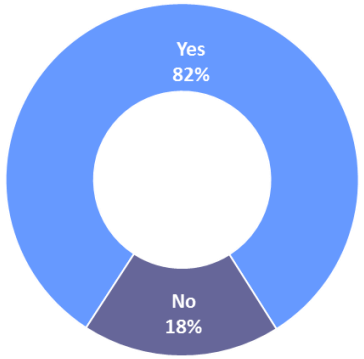
TOTAL		SP		UK	
Training and information	40%	Convenience	45%	Training and information	43%
Convenience	37%	Training and information	40%	Convenience	34%
Not interested	12%	Improve performances	10%	Improve performances	17%
Improve performances	11%	Not interested	8%	Innovation	10%
Cooperation with the provider	4%	Innovation	5%	Not interested	4%
Innovation	4%	Cooperation with the provider	1%	Cooperation with the provider	1%
Customer service	1%	Customer service	0%	Customer service	0%
Other	2%	Other	1%	Other	1%
Total	**758**	**Total**	**101**	**Total**	**72**

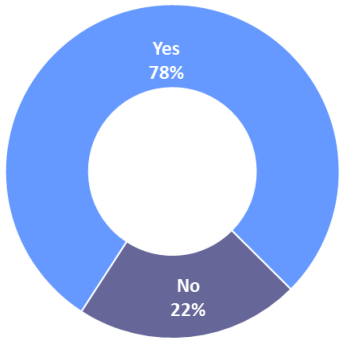
Processing without “don't know”

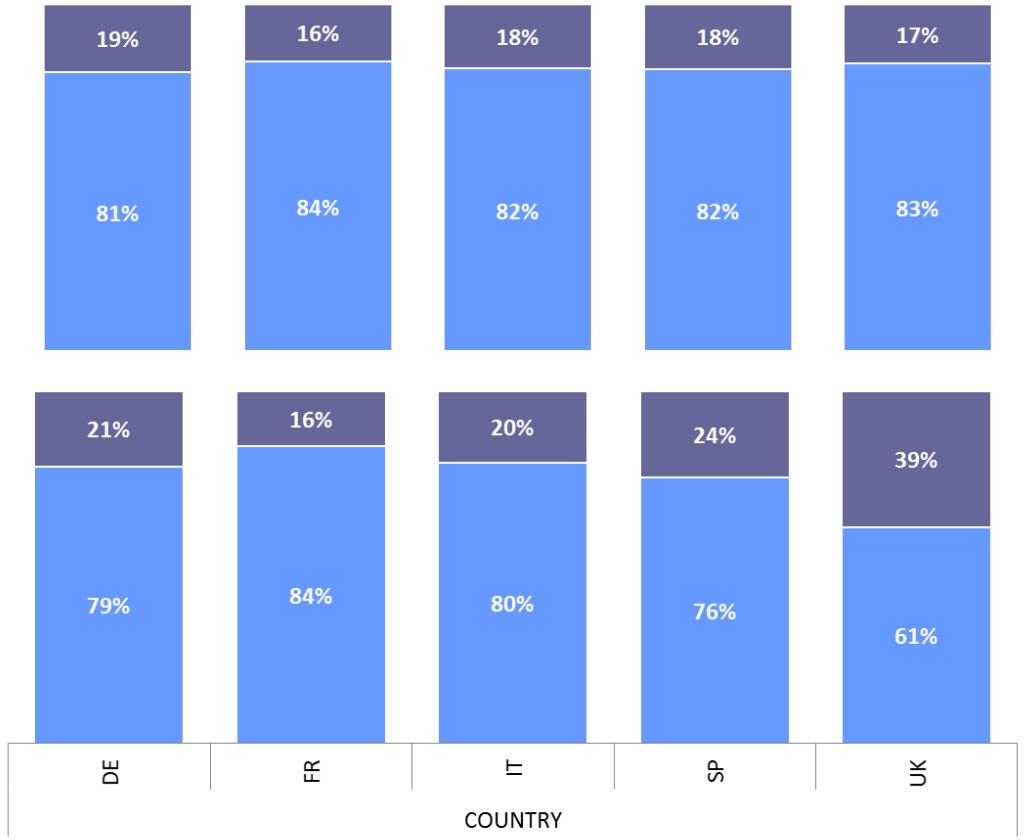
Scenario: 3D printing awareness

Are you aware of the 3D printing technology?

Are you aware of the availability of 3D printing technology in dentistry as well?







3D printing in general

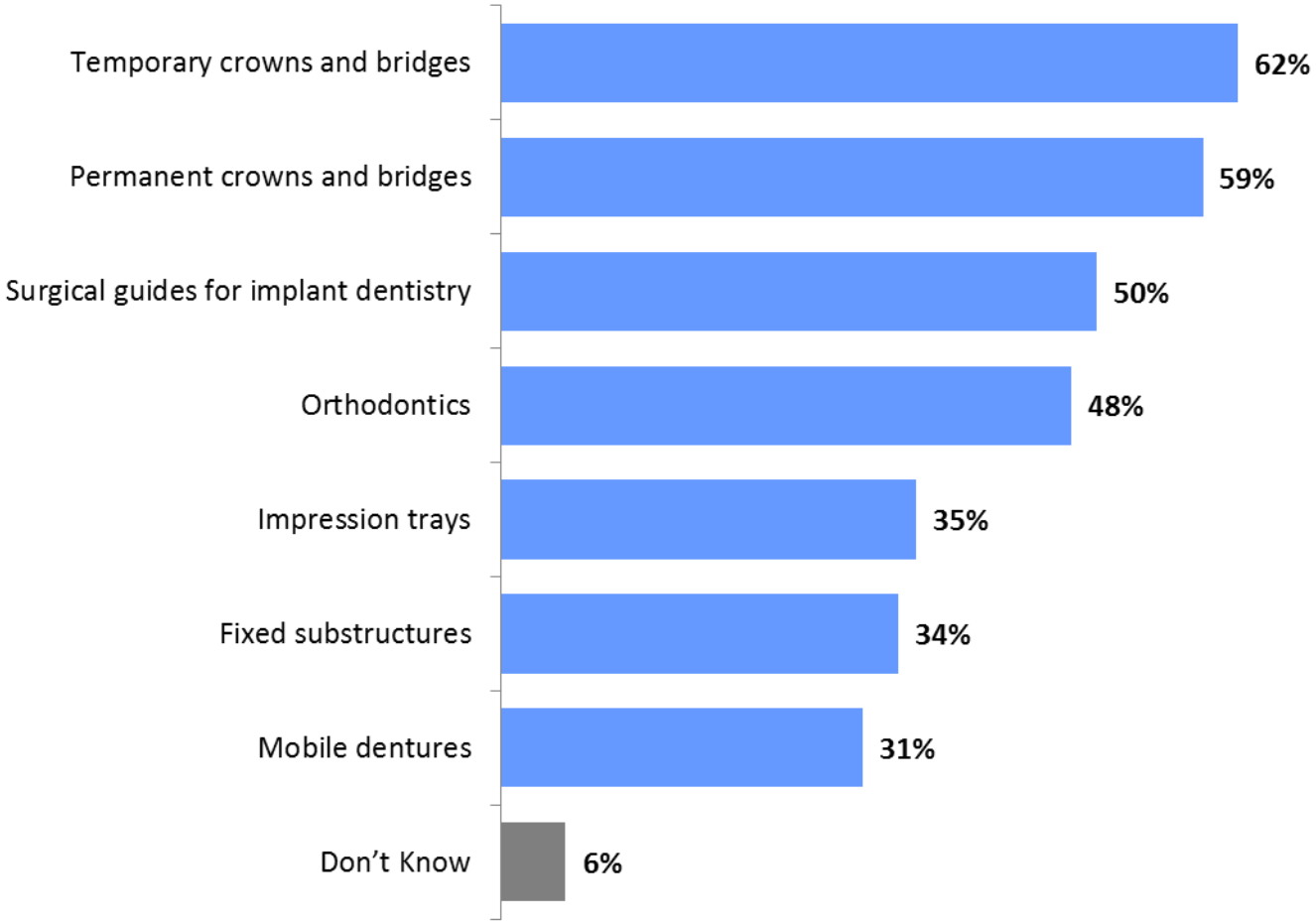
3D printing in dentistry

While the awareness of 3D printing among respondents is quite homogeneous among the countries, the awareness about 3D printing available for dentistry as well is not quite homogeneous as UK shows a relevant below average awareness, while France seems to be the country with the highest awareness.

Base: 1000 cases

Scenario: Most suitable indications for 3D printing

Which of the following indications do you think that 3D printing will be best suitable for?



Crown & Bridges are the most quoted indications suitable for 3D Printing.
Other relevant quotes are related to surgical guides for implants and orthodontics.

Base: 783 cases

Scenario: Most suitable indications for 3D printing

Which of the following indications do you think that 3D printing will be best suitable for?

Surgical guides is the first quoted indication in Italy and Spain while Orthodontics gets a relevant position in Germany.

TOTAL		DE		FR		IT	
Temporary crowns and bridges	62%	Temporary crowns and bridges	55%	Temporary crowns and bridges	81%	Surgical guides for implant dentistry	66%
Permanent crowns and bridges	59%	Orthodontics	54%	Permanent crowns and bridges	75%	Temporary crowns and bridges	56%
Surgical guides for implant dentistry	50%	Permanent crowns and bridges	52%	Surgical guides for implant dentistry	70%	Permanent crowns and bridges	48%
Orthodontics	48%	Impression trays	20%	Impression trays	53%	Orthodontics	48%
Impression trays	35%	Surgical guides for implant dentistry	18%	Fixed substructures	49%	Impression trays	41%
Fixed substructures	34%	Mobile dentures	17%	Mobile dentures	46%	Fixed substructures	38%
Mobile dentures	31%	Fixed substructures	11%	Orthodontics	36%	Mobile dentures	33%
Don't Know	6%	Don't Know	8%	Don't Know	4%	Don't Know	6%
Total	**783**	**Total**	**262**	**Total**	**161**	**Total**	**208**

TOTAL		SP		UK	
Temporary crowns and bridges	62%	Surgical guides for implant dentistry	74%	Permanent crowns and bridges	73%
Permanent crowns and bridges	59%	Permanent crowns and bridges	68%	Temporary crowns and bridges	71%
Surgical guides for implant dentistry	50%	Fixed substructures	61%	Orthodontics	52%
Orthodontics	48%	Temporary crowns and bridges	57%	Impression trays	38%
Impression trays	35%	Orthodontics	50%	Surgical guides for implant dentistry	37%
Fixed substructures	34%	Mobile dentures	36%	Fixed substructures	30%
Mobile dentures	31%	Impression trays	32%	Mobile dentures	29%
Don't Know	6%	Don't Know	5%	Don't Know	1%
Total	**783**	**Total**	**102**	**Total**	**49**

Scenario: Main consequences in dentistry brought by 3D printing

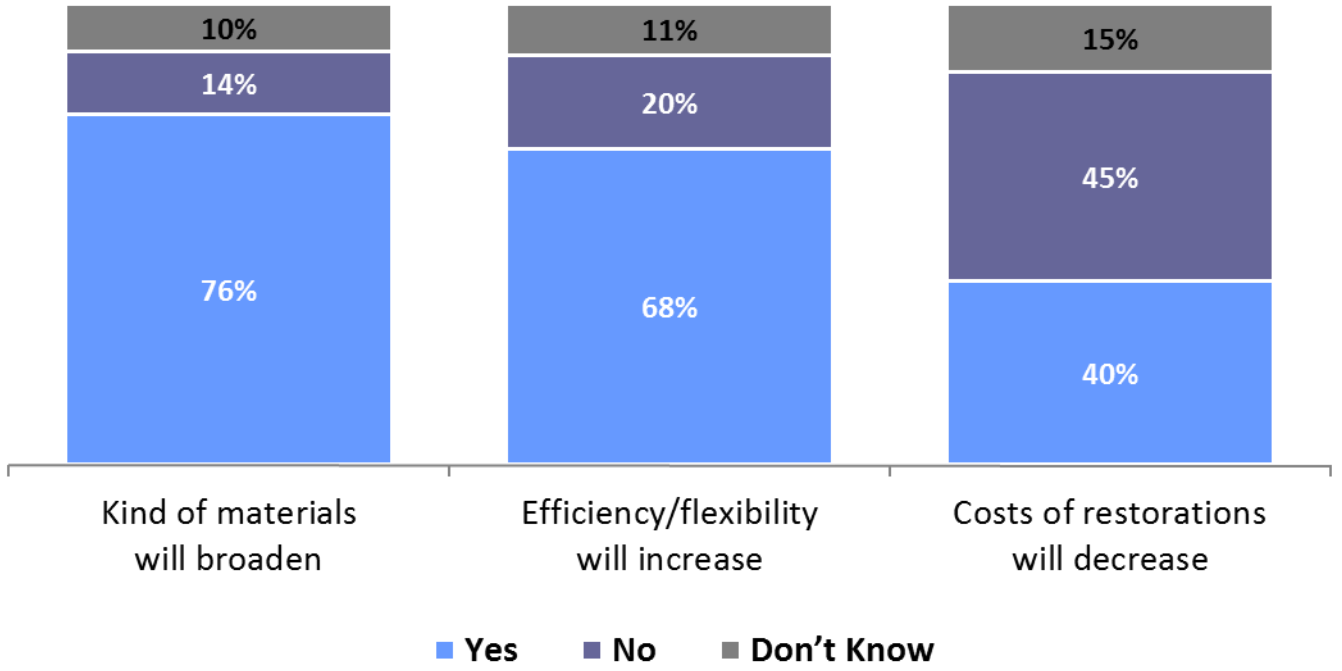
Which of the following statements do you agree on, with regard to the main consequences that 3D printing will bring to the dentistry? (Multiple answer)

According to the opinion of the respondents the main consequence brought by 3D printing is related to the wider array of materials available. This is the most quoted one with 76% of "Yes". The least mentioned possible consequence brought by 3D printing is a reduction in the costs of the restorations, which received only 40% of positive responses. It will be interesting to evaluate in the following slides, option by option, the different behaviour in the evaluated countries.

A) The kind of materials and procedures produced digitally will broaden (Kind of materials will broaden)

B) The efficiency and flexibility of the workflow will increase (Efficiency/Flexibility will increase)

C) The costs of the restorations will decrease because of the lower price of the materials used compared to the CAD-CAM blocks (Costs of restorations will decrease)

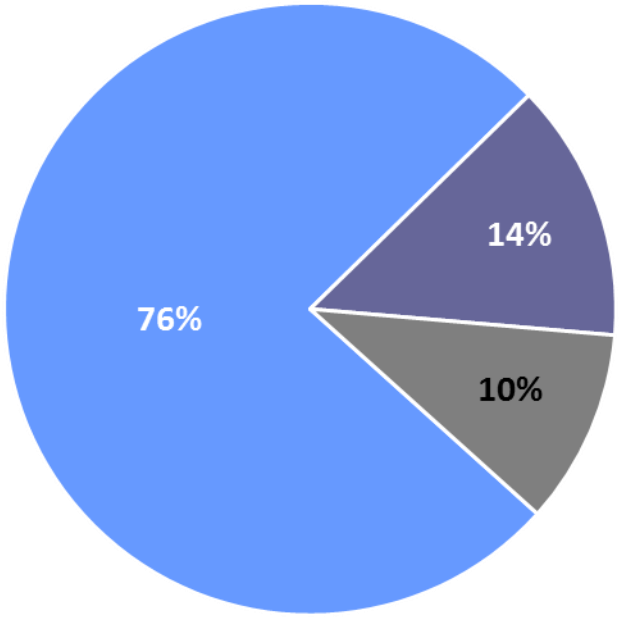


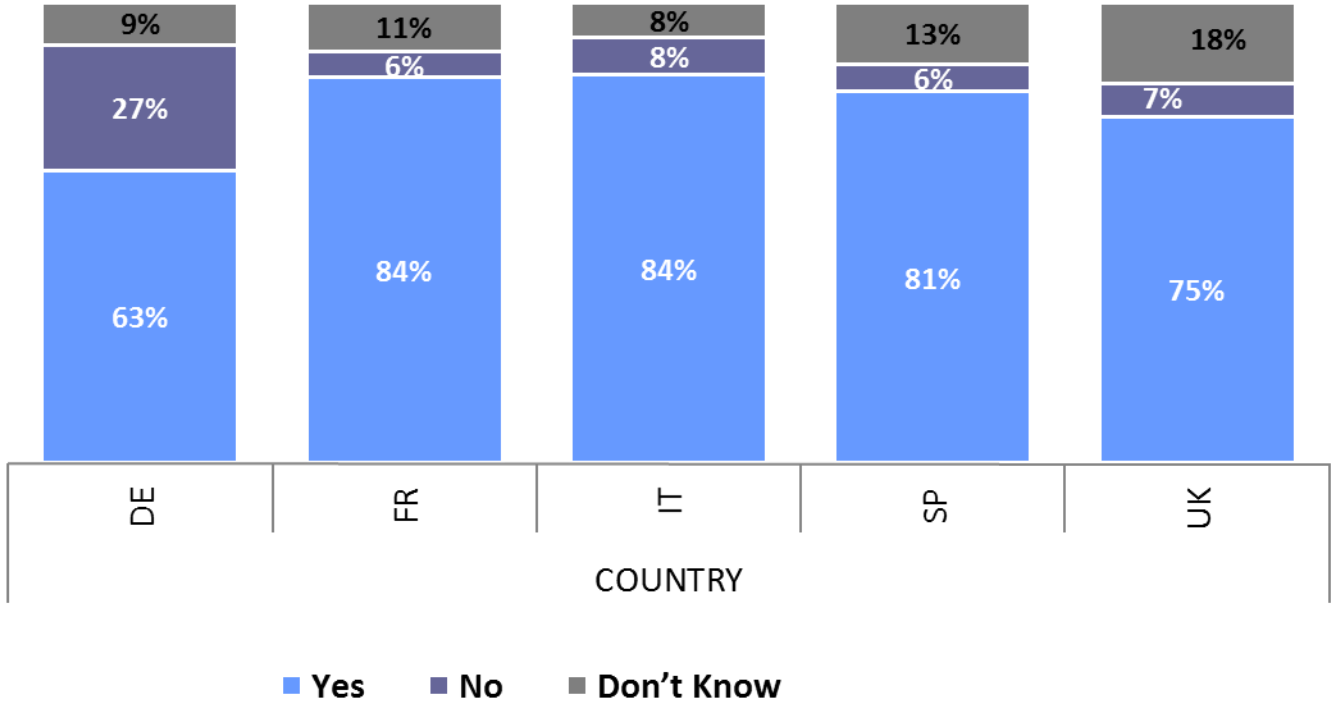
Base: 1000 cases

Scenario: Main consequences in dentistry brought by 3D printing

Which of the following statements do you agree on, with regard to the main consequences that 3D printing will bring to the dentistry? (Multiple answer - Analysis on: The kind of materials and procedures produced digitally will broaden)

It's interesting to note the slightly lower positive opinion of the German respondents, about the fact that the 3D printing may bring a wide range of materials available. Very high the percentage of "Yes" for France, Italy and Spain.



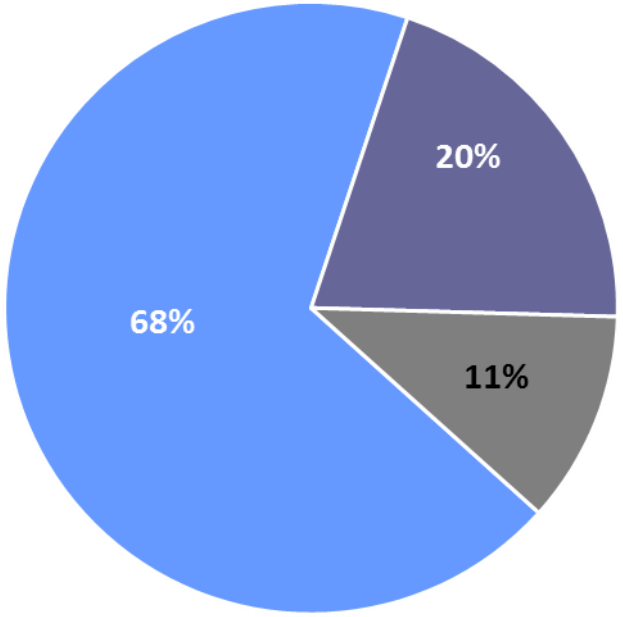


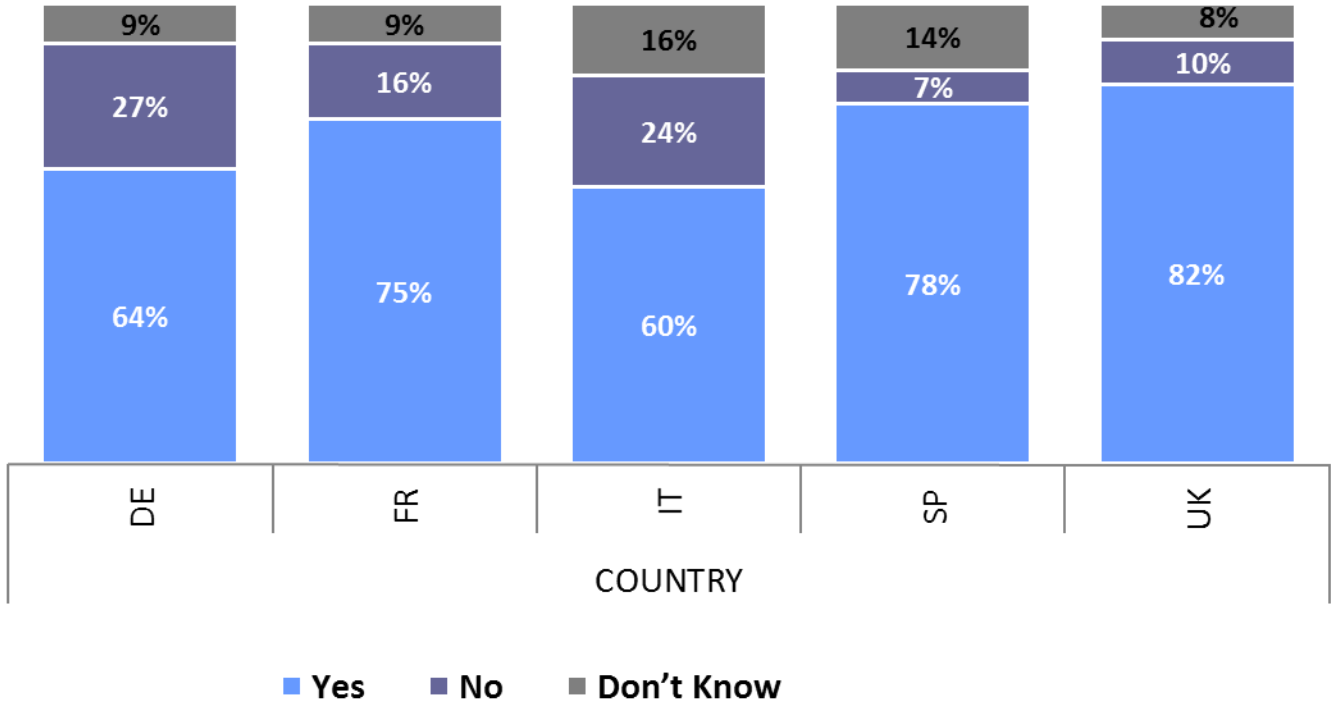
Base: 1000 cases

Scenario: Main consequences in dentistry brought by 3D printing

Which of the following statements do you agree on, with regard to the main consequences that 3D printing will bring to the dentistry? (Multiple answer - Analysis on: The efficiency and flexibility of the workflow will increase)

The most skeptical respondents look to be those of Germany and Italy, whose percentage of negative responses was 27% and 24% respectively. Very high the percentage of "yes" in UK.



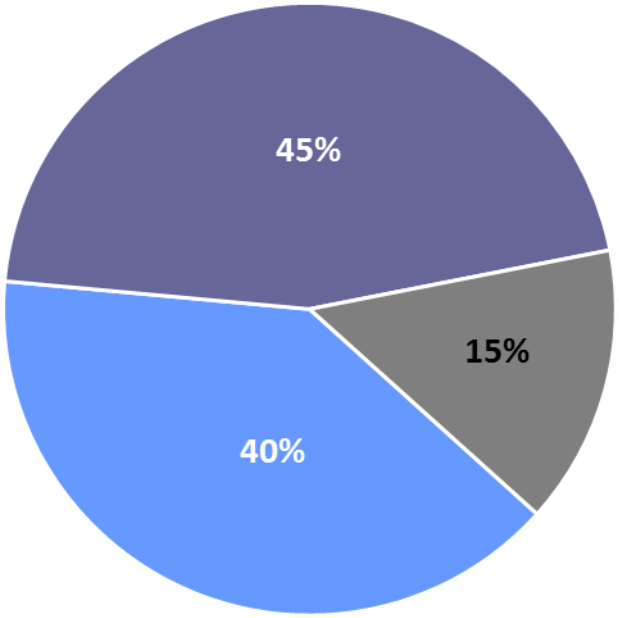


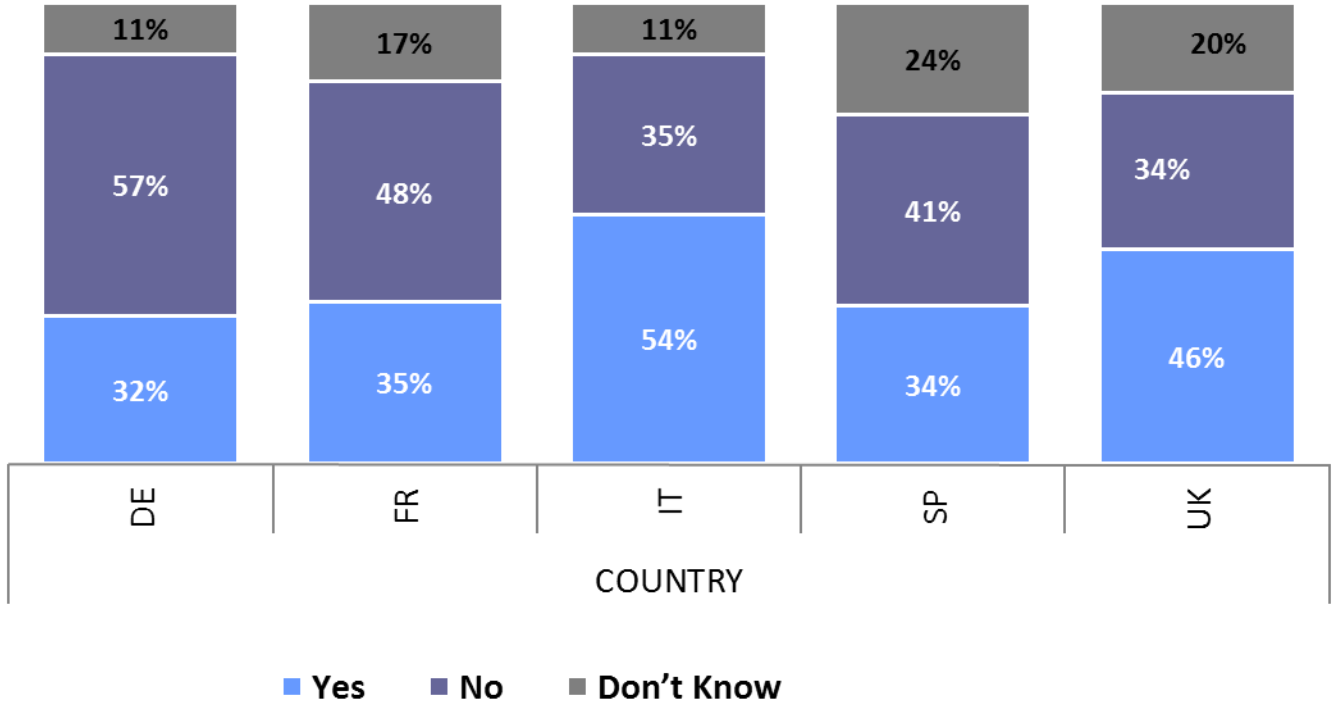
Base: 1000 cases

Scenario: Main consequences in dentistry brought by 3D printing

Which of the following statements do you agree on, with regard to the main consequences that 3D printing will bring to the dentistry? (Multiple answer - Analysis on: The costs of the restorations will decrease because of the lower price of the materials used compared to the CAD-CAM blocks)

The sample of dental practices shows a rather low percentage of positive responses, as the average is 40% of respondents thinking that 3D printing will bring a reduction in the cost of the restorations. The lowest percentage comes from Germany (32%), but France and Spain are on the same level. UK and Italy are the most positive ones (46% and 54% respectively, of "Yes" answers).



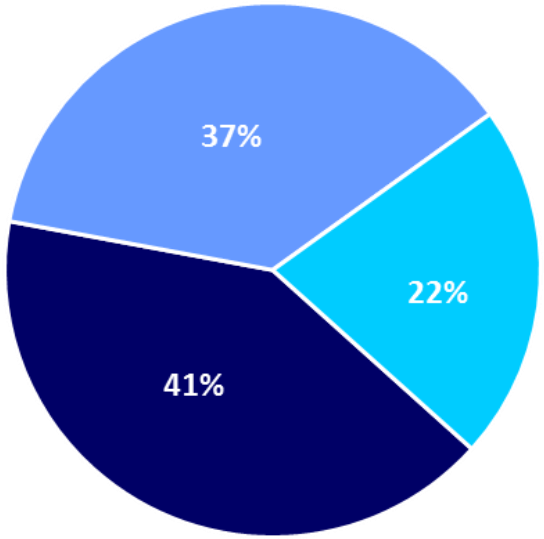


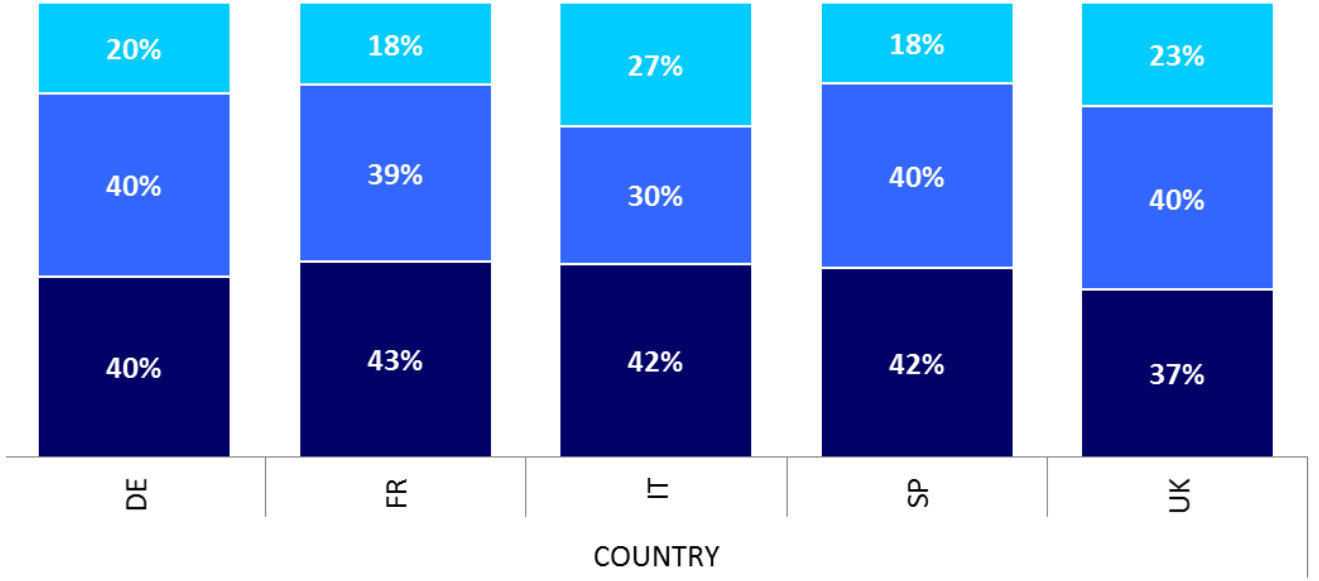
Base: 1000 cases

Scenario: Main consequences in dentistry brought by 3D printing

Which of the following statements do you agree on, with regard to the main consequences that 3D printing will bring to the dentistry? FOCUS ON "YES" ANSWERS

The answers "Yes" belonging to all 3 possible options were summed up. The charts shown in this slide resumes the weight that the "Yes" responses of each option has out of the total "Yes" answers from all three options.
The charts highlight that the consequence indicated to be the most probable one is an improvement in the range of materials and procedures available, which will become broader with the development of 3D printing. No relevant differences can be highlighted in the countries evaluated.



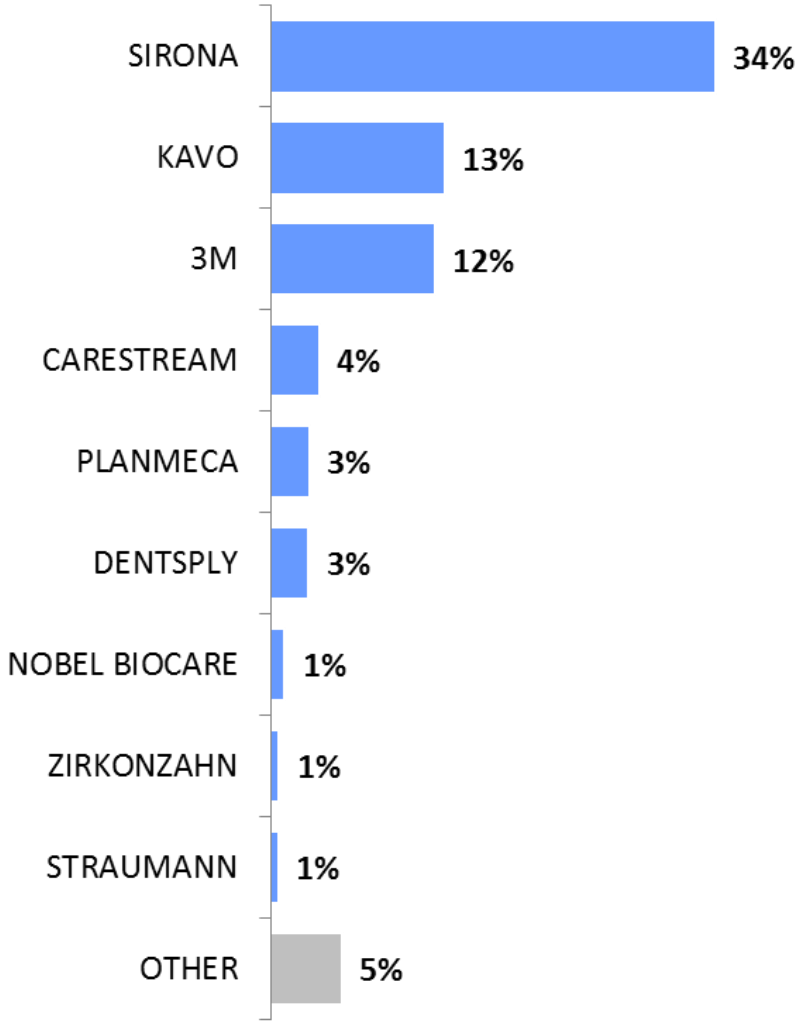


Base: 1000 cases

Brand awareness

Brand awareness: Unaided

What manufacturers of the new digital technology world (as Scanners, CAD-CAM, 3D Printing, etc.) come to your mind?



Spontaneous Awareness (Unaided):
It represents the entire group of brands of a certain product family, recalled by the interviewed sample. Within the boundaries of spontaneous awareness, the consumer reasonably decides to make a purchase.

Among the listed brands, Sirona can be considered the only true digital technology brand, as the awareness of the other ones is rather related to their presence in the market, regardless of the new digital technologies.

Processing without “don't know”

Base: 988 cases

Brand awareness: Unaided

What manufacturers of the new digital technology world (as Scanners, CAD-CAM, 3D Printing, etc.) come to your mind?

UK, where the digital technologies penetration is rather low, is the only country where Sirona is not the leader. Germany shows a co-leadership of Sirona and Kavo.

TOTAL		DE		FR		IT		SP		UK	
SIRONA	34%	SIRONA	51%	SIRONA	28%	SIRONA	34%	SIRONA	11%	3M	33%
KAVO	13%	KAVO	30%	3M	12%	3M	19%	3M	10%	DENTSPLY	20%
3M	12%	3M	4%	PLANMECA	4%	CARESTREAM	7%	CARESTREAM	6%	SIRONA	18%
CARESTREAM	4%	DENTSPLY	3%	KAVO	2%	KAVO	6%	PLANMECA	3%	KAVO	15%
PLANMECA	3%	PLANMECA	1%	CARESTREAM	2%	PLANMECA	5%	KAVO	2%	CARESTREAM	9%
DENTSPLY	3%	IOS TECHNOLOGIES	1%	NOBEL BIOCARE	2%	NOBEL BIOCARE	2%	NOBEL BIOCARE	2%	DENTAL WINGS	2%
NOBEL BIOCARE	1%	HERAEUS	1%	STRAUMANN	1%	MHT	2%	ZIRKONZAHN	2%	IOS TECHNOLOGIES	2%
ZIRKONZAHN	1%	DENTAL DIREKT	1%	LYRA	1%	DENTSPLY	1%	DENTSPLY	1%	BIOLASE	2%
STRAUMANN	1%			HENRY SCHEIN	1%	ZIRKONZAHN	1%	STRAUMANN	1%	PLANMECA	1%
OTHER	5%	OTHER	0%	OTHER	0%	OTHER	0%	OTHER	0%	OTHER	0%
Total	**988**	**Total**	**324**	**Total**	**190**	**Total**	**261**	**Total**	**134**	**Total**	**79**

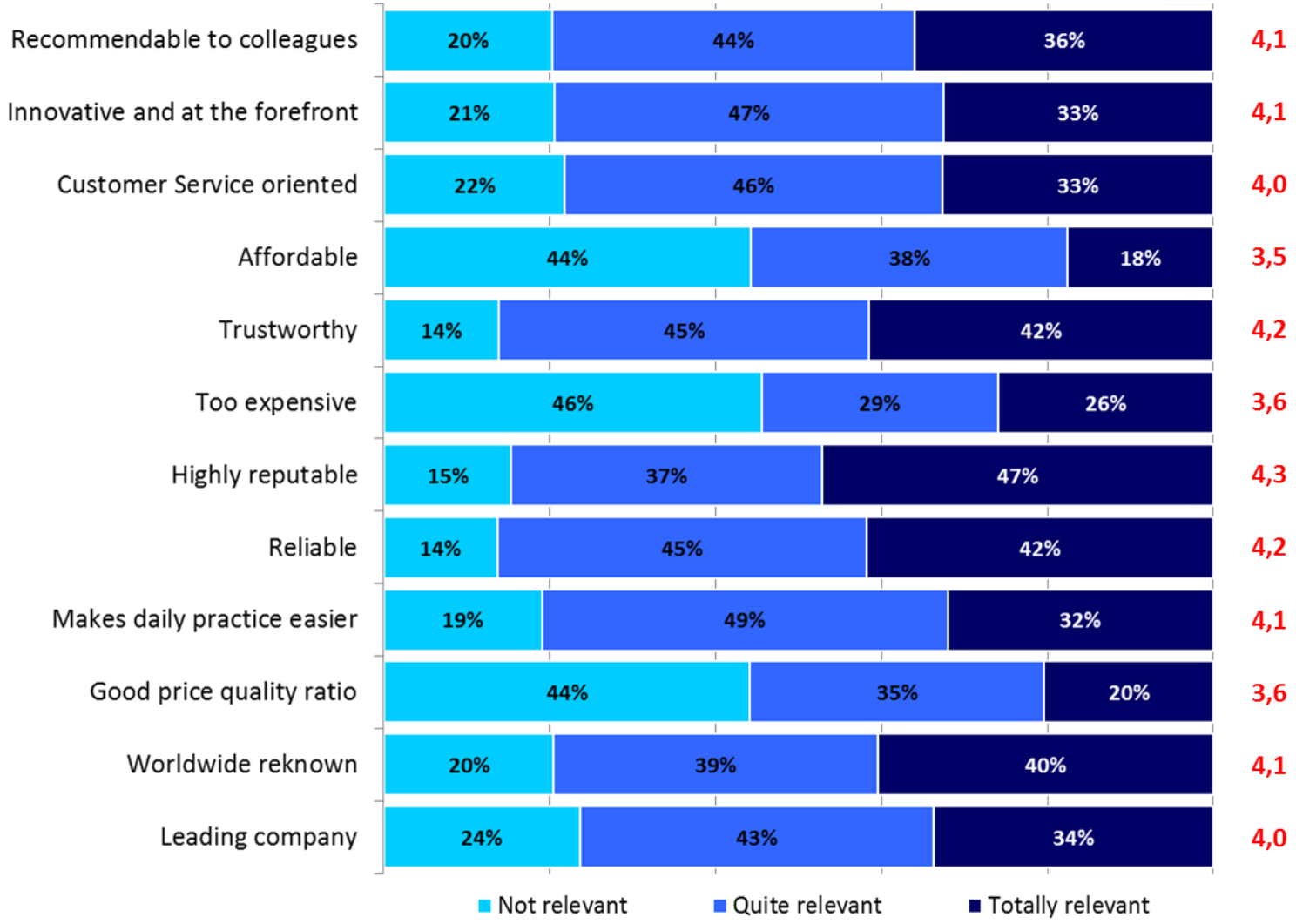
Awareness and association with the digital technologies of Carestream and Planmeca are affected by their presence in the X-ray digital market.

Processing without “don't know”

Brand positioning

Brand positioning: Overall Brands

In your opinion, how do the brands that I am going to read out to you rate in the following areas? Please rate them with totally irrelevant, partially irrelevant, neutral, quite relevant, totally relevant.



NOTE
The 5 possible answers have been further clustered in order to better highlight the differences in the scores among the items and the brands evaluated. The clustering is the following:
Not relevant: the scores grouped in this cluster are "Totally irrelevant", "Partially irrelevant", "Neutral".
The other clusters "**Quite relevant**" and "**Totally relevant**" are related to the original answers without any grouping.

High reputation is the item that received the highest average scores, followed by Reliable and Trustworthy.
The lowest scores come from Affordable, Too expensive and Good price/quality ratio. As if the image of the brand in the digital world are is not associated with price related topics.

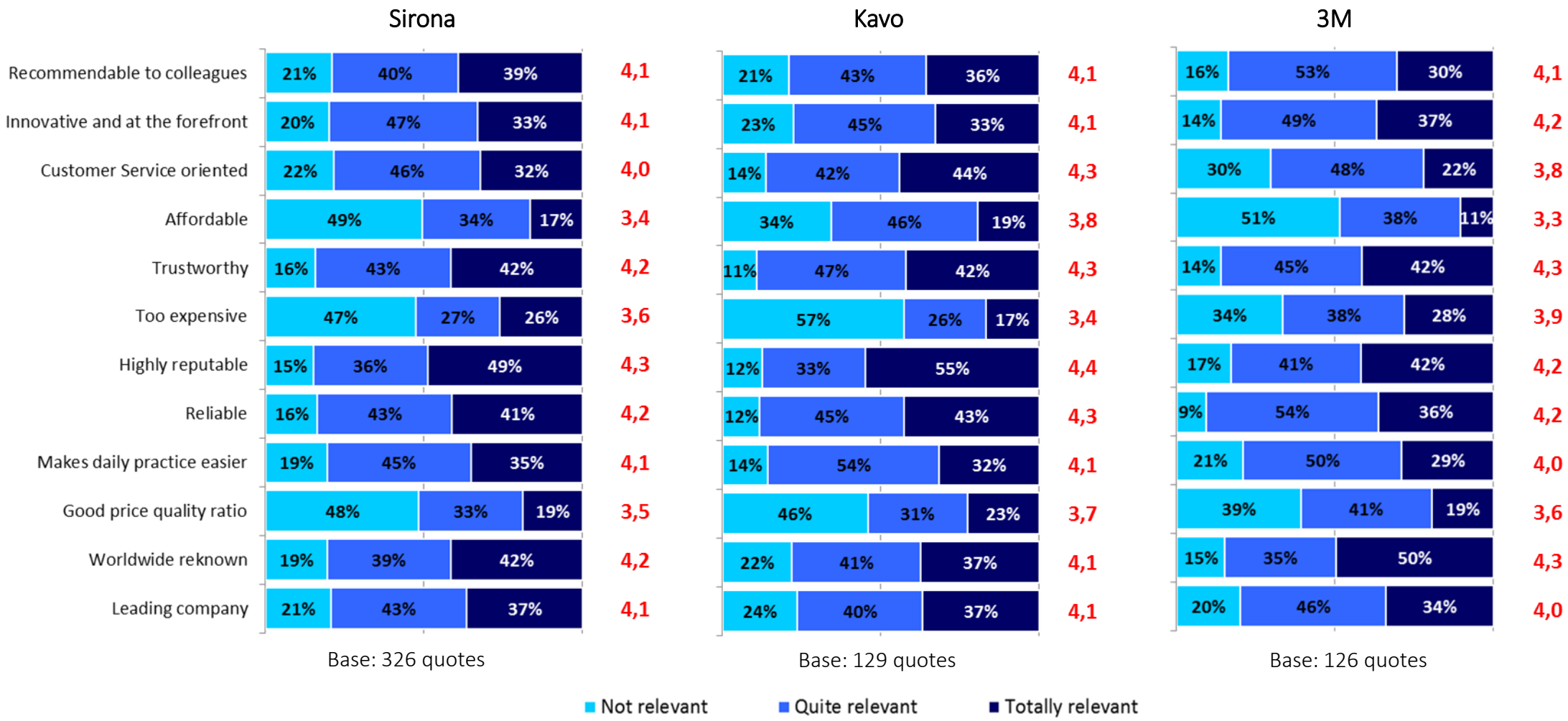
Processing without "don't know"

Base: 758 quotes

Brand positioning: Sirona, Kavo, 3M

In your opinion, how do the brands that I am going to read out to you rate in the following areas? Please rate them with totally irrelevant, partially irrelevant, neutral, quite relevant, totally relevant.

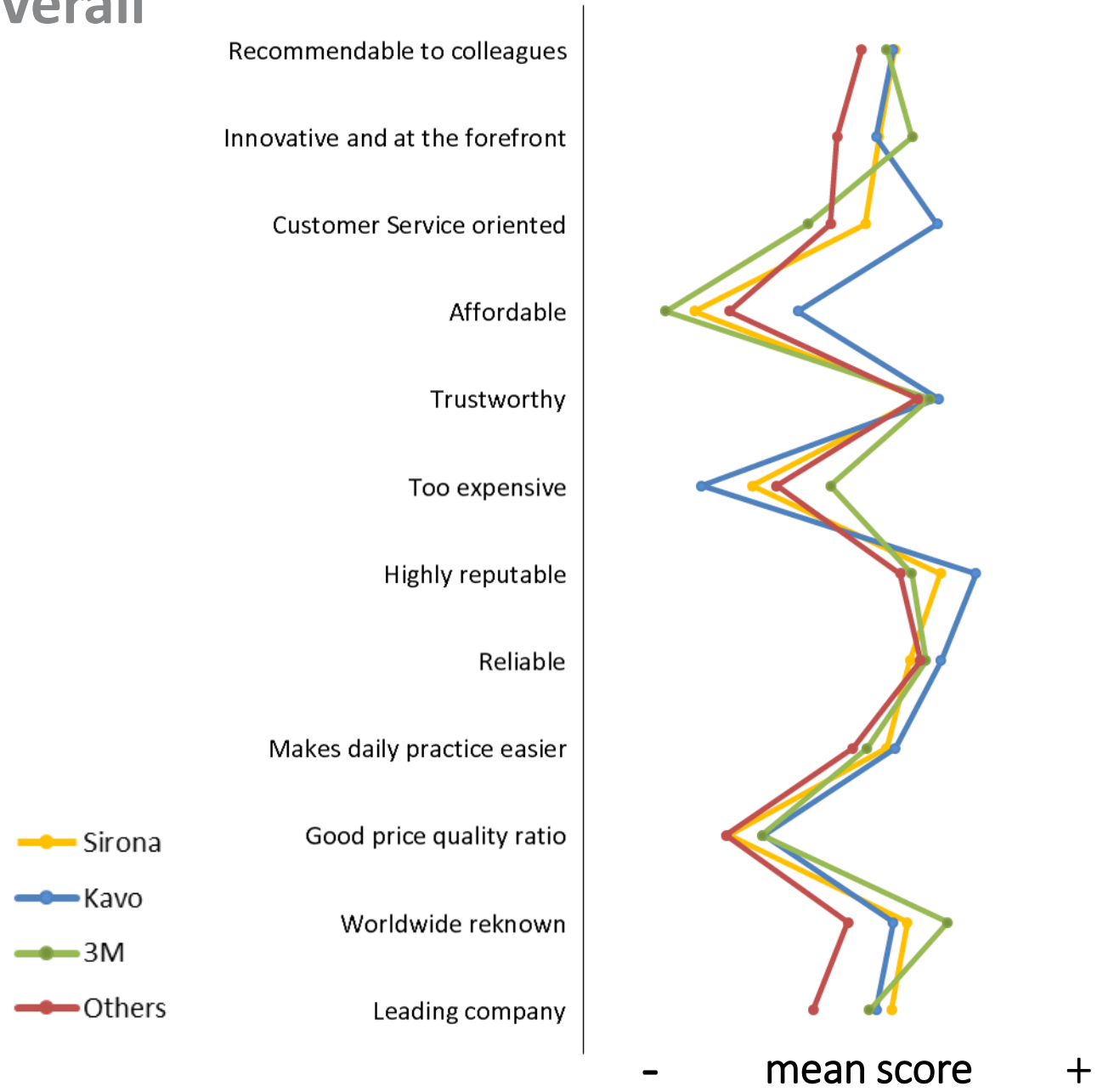
Processing without "dont know"



Brand positioning: Overall

In your opinion, how do the brands that I am going to read out to you rate in the following areas?

While Sirona is rather on average, given the high number of quotes received, it's interesting to note Kavo performing better than the competitors with regard to Affordability and Customer service oriented, while 3M is more than other brands associated with Too expensive and Worldwide renowned.



Brand positioning: Factor analysis

FACTOR ANALYSIS

Its goal is to reduce the information contained in several variables by synthesizing a few factors. It aims to identify a substructure underlying a group of variables, and resume this substructure with a reduced number of latent variables.

Thanks to the factor analysis, **some positioning drivers can be identified**, that, as a matter of fact, represent the brand image analysed.

The reduction into factors allowed us to obtain 2 main drivers, **"Nearness"** vs. **"Reputation".**

They are very relevant in order to achieve a positioning analysis. This kind of analysis, has a relevant advantage: the here defined set of 2 drivers allows to design a positioning map, explained by the following slide.

Factor 1 (Nearness) it is driven by items like Affordability, Customer service oriented, Makes daily practice easier, clearly related to the nearness, whose concept is reinforced by Reliability and Good price quality ratio.

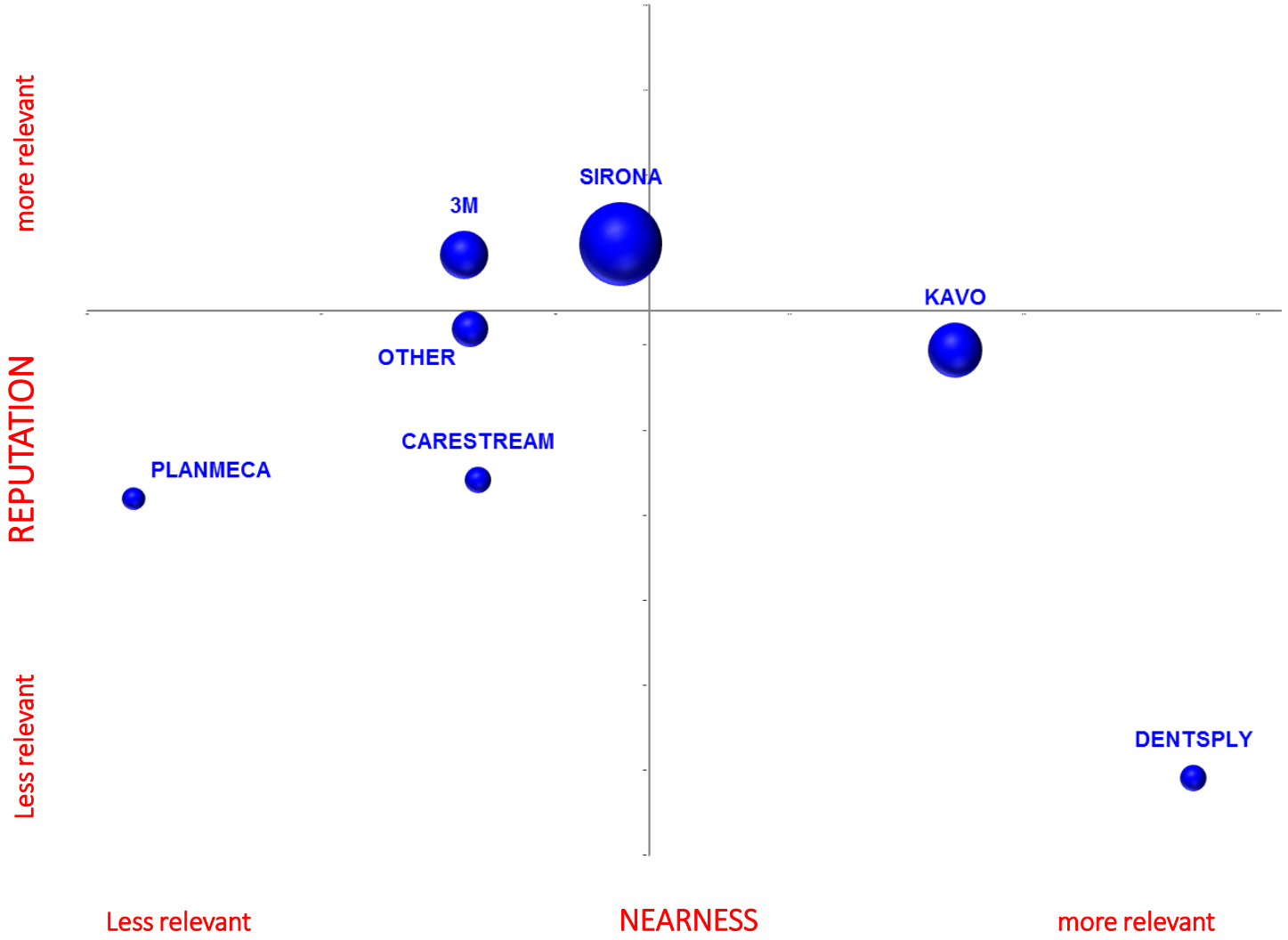
Factor 2 (Reputation) it is driven by items clearly related to the reputation, such as Leading company and Worldwide renowned on top of all. Too expensive may be part of the Reputation as brand with high reputation are often seen as more expensive than the average.

Two Factors	Nearness	Reputation
Affordable	0,764	
Good price quality ratio	0,684	
Customer Service oriented	0,633	
Makes daily practice easier	0,631	
Reliable	0,602	
Trustworthy	0,589	0,485
Leading company		0,800
Worldwide renowned		0,714
Innovative and at the forefront		0,628
Highly reputable		0,574
Too expensive		0,353

Brand positioning: Positioning map 1

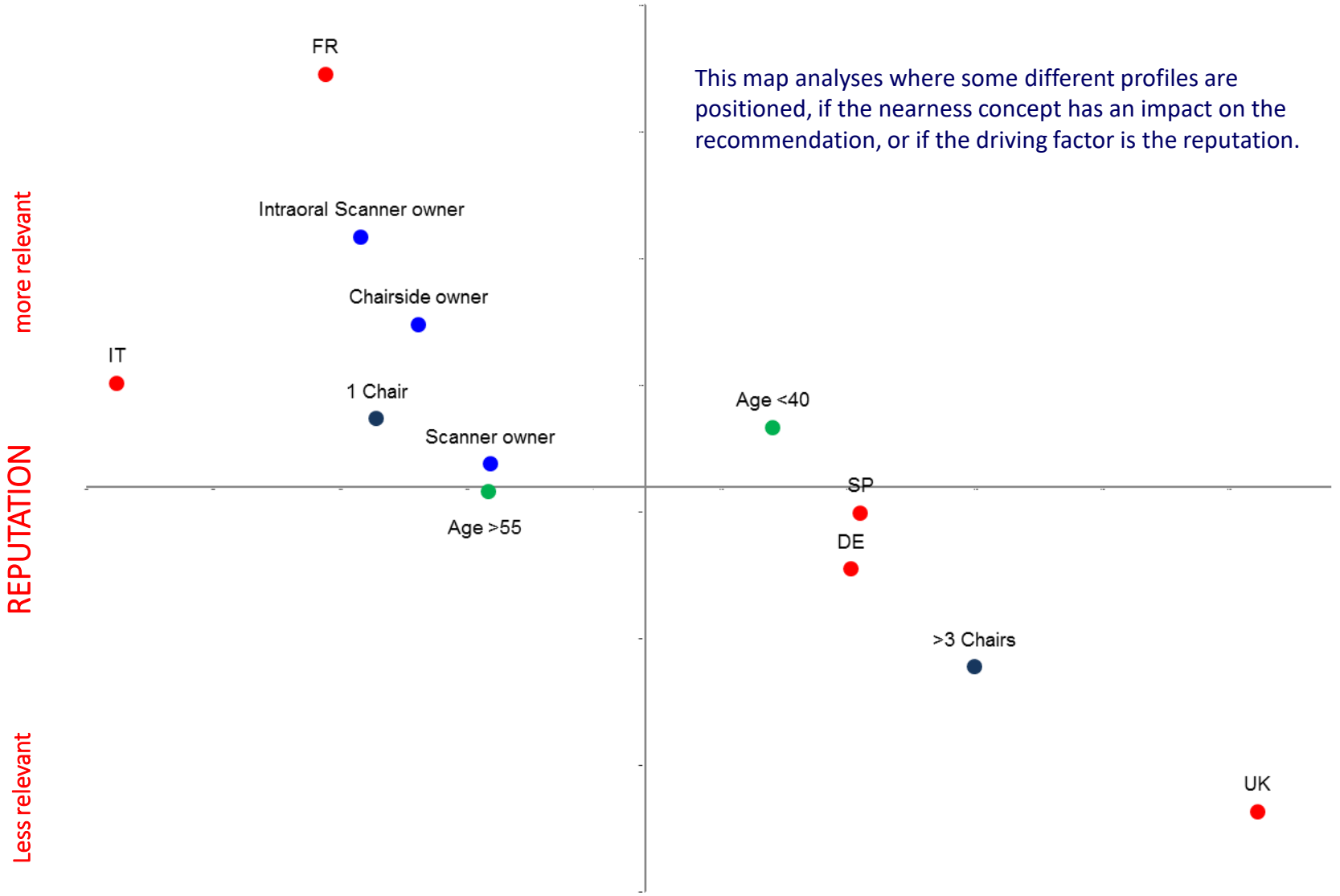
The map is an actual brand positioning one, as it shows how the different brands are seen, with regard to the factors identified, by the respondents.

The map is slightly on the lower side as Sirona, which received most of the quotes, affects the map itself and determines the variance, with a central position.
Kavo is stronger in Germany, while Dentsply is stronger in UK. For the latter, it's not sure if the image is strictly related to Dentsply or Degudent or Atlantis.
Planmeca and Carestream, although belonging to the digital technology world, partially due their positioning to their strong presence in the digital X-ray market.



Brand positioning: Positioning map 2

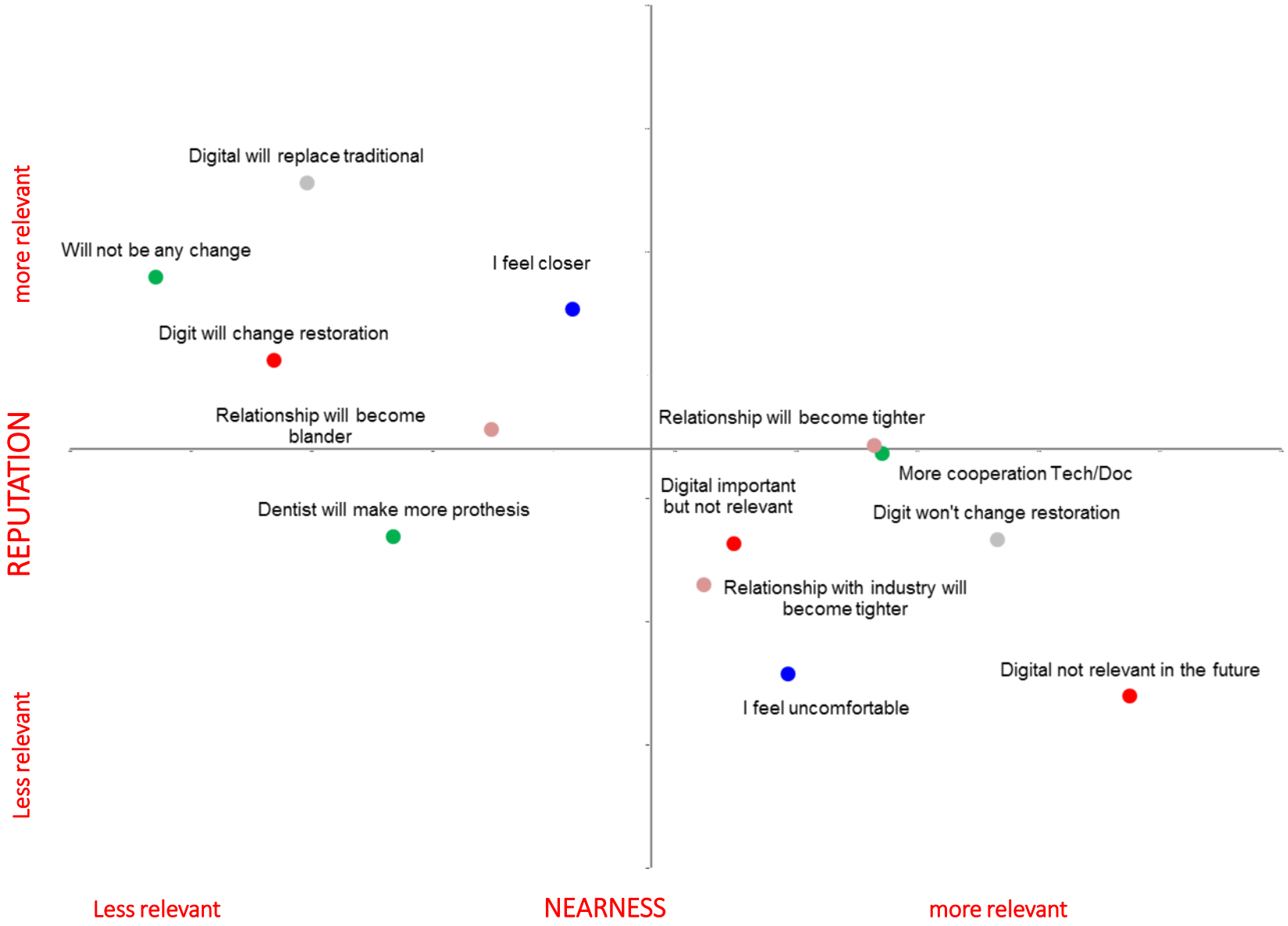
The fact that some different profiles are closer than other (e.g. Germany and >3 chairs) doesn't mean that those profiles are related to each other (i.e. it's not said that German respondents have >3 chairs).
France positioning is more related to immature markets, where the driving forces are more focused on the reputation, while the German market, more mature, is driven by the service components, so it is closer to the nearness concept.



This map analyses where some different profiles are positioned, if the nearness concept has an impact on the recommendation, or if the driving factor is the reputation.

Brand positioning: Positioning map 3

In this map, some psychographic profiles are present.
It's interesting to see how the respondents close to the concept that digital technologies will not change dramatically the future of dentistry, and forecasting an overall increase in the cooperation among the different actors (dentists, laboratories and industry) are closer to a nearness concept.
On the contrary, profiles more keen to think about a true change in dentistry, but far from a "cooperation attitude", are closer to the reputation.



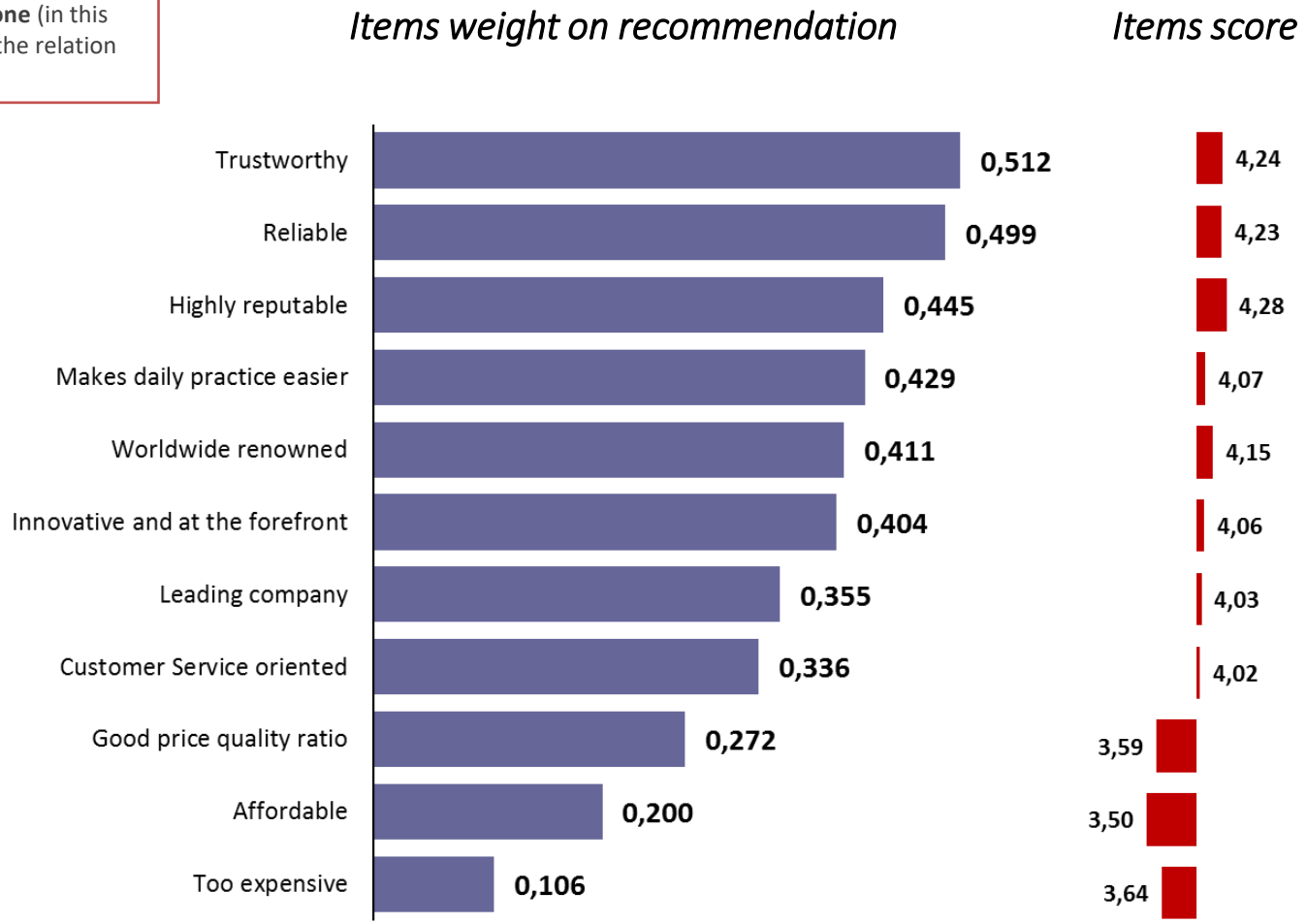
Brand image vs Recommendation - Correlation analysis

How much are worth the single items on the recommendation?

BIVARIATE CORRELATION ANALYSIS

The bivariate correlation analysis is a technique that helps **to identify and measure the influence of the independent variables** (in this case, each brand positioning item) **on the dependent one** (in this case, the **recommendation**). The bivariate correlation analysis has been used to quantify the relation between the score on the single factors and the rating on the recommendation

With the Bivariate Correlation analysis we try to understand **how much the factors seen in the factor analysis influence the recommendation**, by analysing the **different weight that the single items** composing the factors **have on the recommendation**.



Brand image vs Recommendation - Correlation analysis map

The map is the visual results of the two different charts seen in the previous slide.
On the horizontal axis there is the weight on the recommendation of each item, and on the vertical one there's the rating of each item.
Considering rather new and immature markets, it's not rare to see the items related to the pricing in general not to be relevant in the recommendation process.

The items on the upper right side of the map, very close one to each other, will be further investigated on the regression analysis, in order to evaluate their importance on the recommendation.

Brand image vs Recommendation - Correlation analysis ranking

FOCUS ON WEIGHT ON RECOMMENDATION

	Overall ranking	Sirona	Kavo	3M	Others
Trustworthy	1°	3°	1°	n.a	1°
Reliable	2°	2°	2°	2°	3°
Highly reputable	3°	1°	5°	n.a	7°
Makes daily practice easier	4°	4°	9°	1°	5°
Worldwide renowned	5°	5°	3°	3°	8°
Innovative and at the forefront	6°	8°	4°	4°	2°
Leading company	7°	7°	6°	n.a	4°
Customer Service oriented	8°	6°	7°	n.a	6°
Good price quality ratio	9°	9°	8°	n.a	9°
Affordable	10°	10°	10°	n.a	10°
Too expensive	11°	11°	n.a.	n.a	n.a

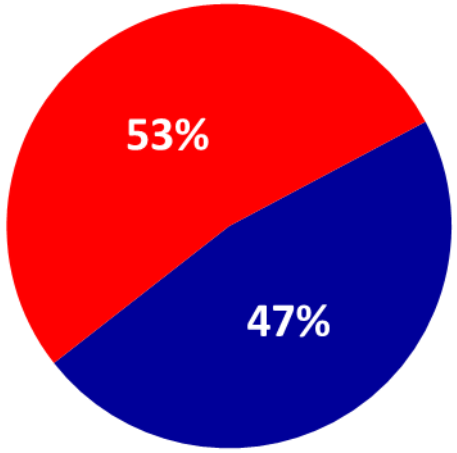
When the analysis is performed on the ranking based on the weight that the different items have on the recommendation of the main brands, it's interesting to note how not all items are relevant to all brands.
This is the case of 3M, where several items are not relevant, while its recommendation looks to be more affected by the fact that it makes the daily practice easier, reliability, innovation and reputation.

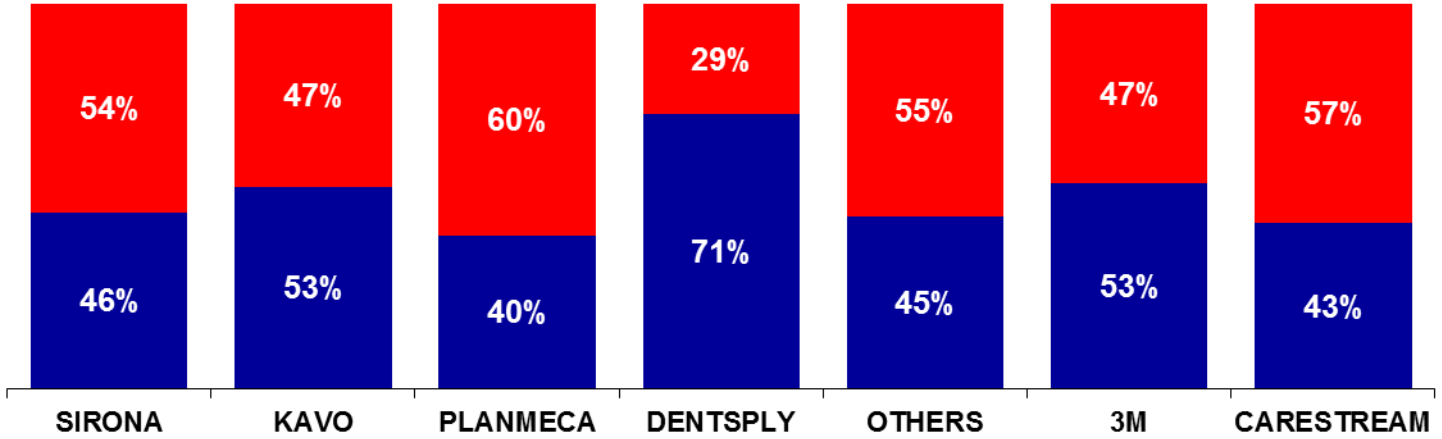
Brand image - Multiple regression analysis

MULTIPLE REGRESSION ANALYSIS

The regression analysis is a multi-variate statistical technique whose main aim is to find out the existing relationship between a target variable (dependent variable, in our case, the recommendation) and a group of independent variables (each single factor derived from the factor analysis).

One of the main focus of the multiple regression is to assess how much part of the dependent variable (recommendation) is explained by the independent variables (corner stone factors of the recommendation which have been previously indicated: Nearness, Reputation), i.e. how much these factors are influencing the behavior of the dependent one.



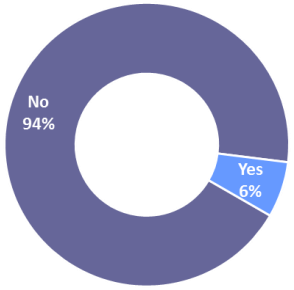


It's interesting to note how it looks like in the process of the recommendation both factors are almost equally involved and important. Only in some clusters like Dentsply brand, the Nearness seems to have a higher weight in determining the recommendation.

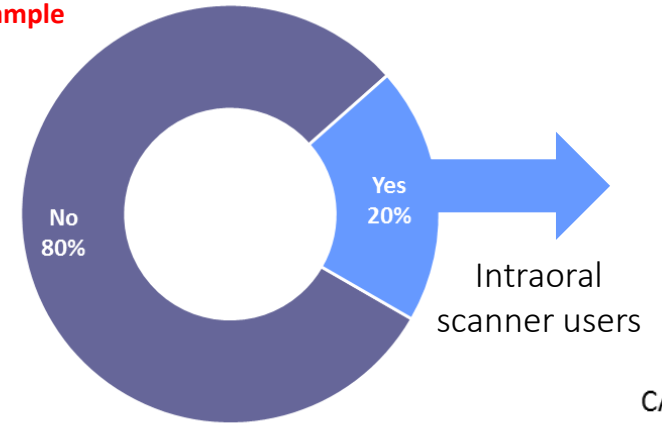
Brand numeric distribution and intention to buy

Brand numeric distribution: Intraoral scanner

What intra oral scanner brand do you use?

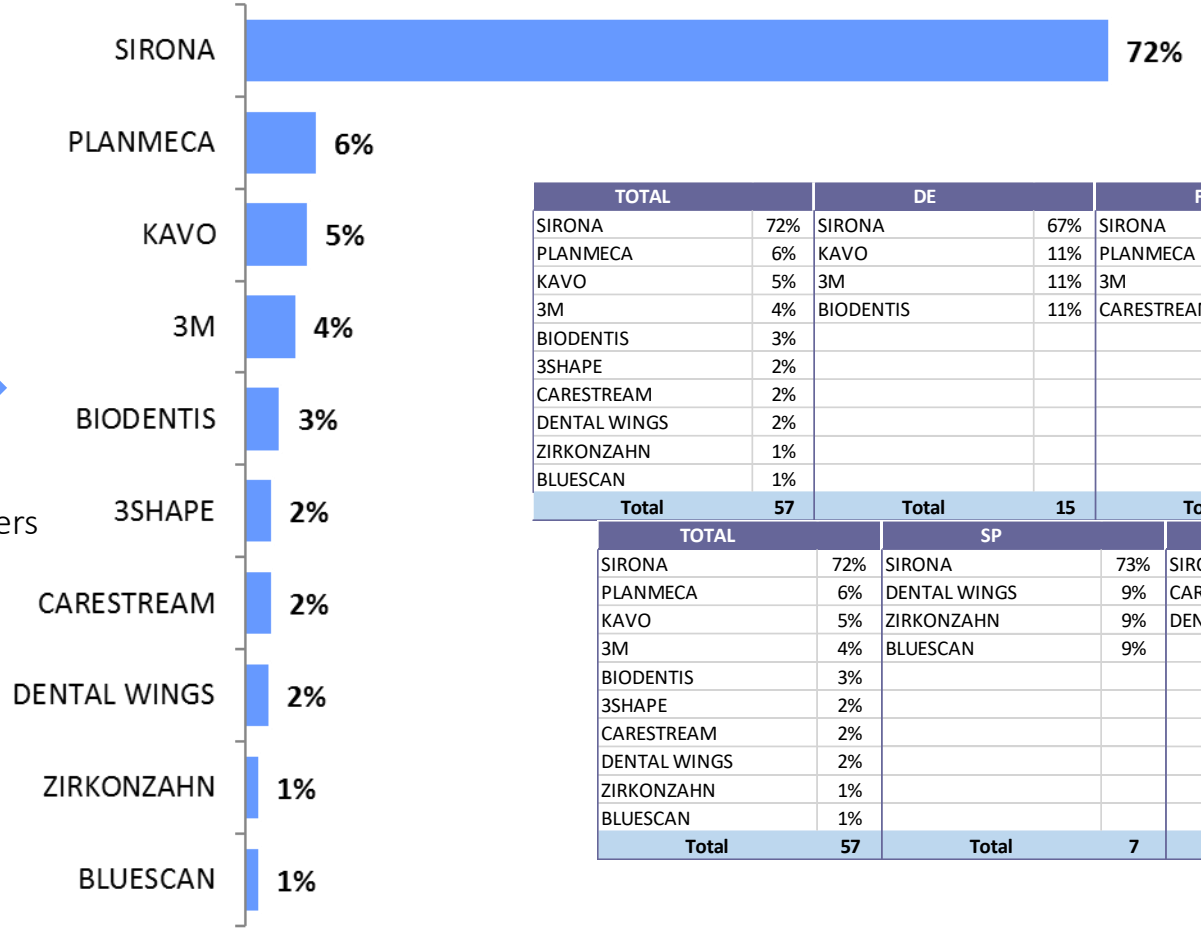


Total sample



Digital technology users

Intraoral scanner users



TOTAL		DE		FR		IT	
SIRONA	72%	SIRONA	67%	SIRONA	70%	SIRONA	75%
PLANMECA	6%	KAVO	11%	PLANMECA	10%	PLANMECA	13%
KAVO	5%	3M	11%	3M	10%	KAVO	6%
3M	4%	BIODENTIS	11%	CARESTREAM	10%	3SHAPE	6%
BIODENTIS	3%						
3SHAPE	2%						
CARESTREAM	2%						
DENTAL WINGS	2%						
ZIRKONZAHN	1%						
BLUESCAN	1%						
Total	57	Total	15	Total	8	Total	21

TOTAL		SP		UK	
SIRONA	72%	SIRONA	73%	SIRONA	80%
PLANMECA	6%	DENTAL WINGS	9%	CARESTREAM	10%
KAVO	5%	ZIRKONZAHN	9%	DENTAL WINGS	10%
3M	4%	BLUESCAN	9%		
BIODENTIS	3%				
3SHAPE	2%				
CARESTREAM	2%				
DENTAL WINGS	2%				
ZIRKONZAHN	1%				
BLUESCAN	1%				
Total	57	Total	7	Total	5

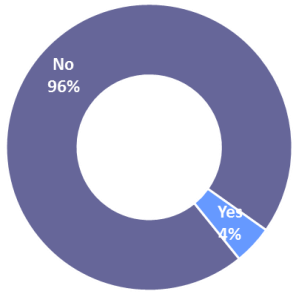
Numeric Distribution

It is the percentage of clients that mentioned to use a certain product / brand, or to get delivered by a certain supplier. That's why it is comparable with the coverage index, it is a subjective value, which is named by the clients as "their" product or "their" supplier.

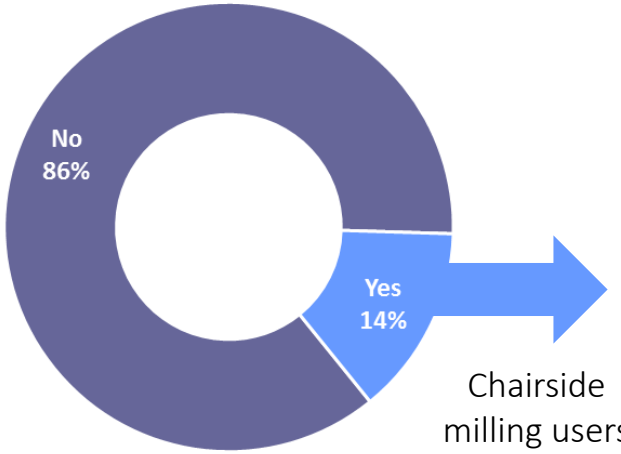
Base: 57 cases

Brand numeric distribution: Chairside milling

What chairside milling unit brand do you use?

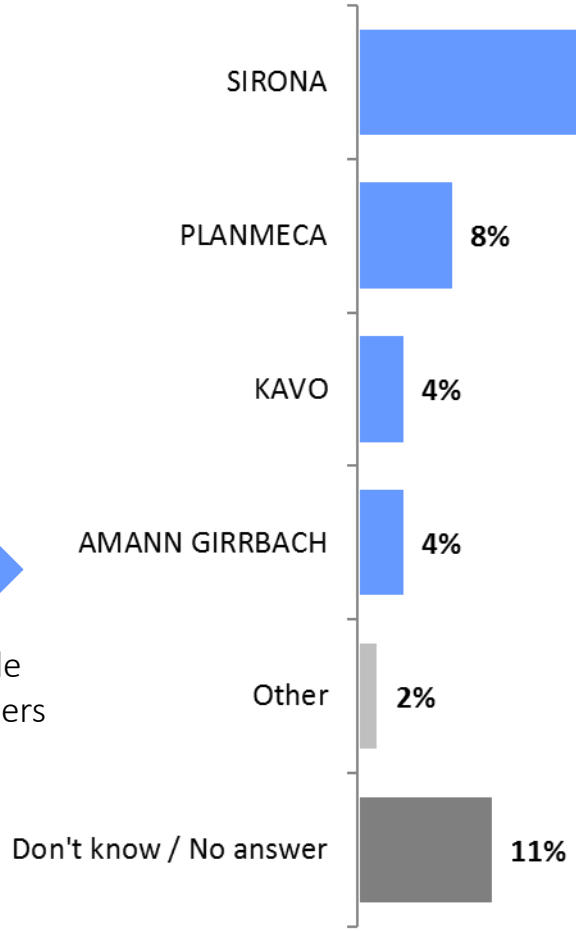


Total sample



Chairside milling users

Digital technology users



TOTAL		DE		FR	
SIRONA	71%	SIRONA	43%	SIRONA	63%
PLANMECA	8%	KAVO	14%	PLANMECA	13%
KAVO	4%	AMANN GIRRBACH	14%		
AMANN GIRRBACH	4%				
Other	2%	Other	0%	Other	13%
Don't know / no answer	11%	Don't know / no answer	29%	Don't know / no answer	13%
Total	**42**	**Total**	**12**	**Total**	**6**

TOTAL		IT		SP		UK	
SIRONA	71%	SIRONA	82%	SIRONA	89%	SIRONA	100%
PLANMECA	8%	PLANMECA	18%				
KAVO	4%						
AMANN GIRRBACH	4%						
Other	2%	Other	0%	Other	0%	Other	0%
Don't know / no answer	11%	Don't know / no answer	0%	Don't know / no answer	11%	Don't know / no answer	0%
Total	**42**	**Total**	**14**	**Total**	**6**	**Total**	**4**

Base: 42 cases

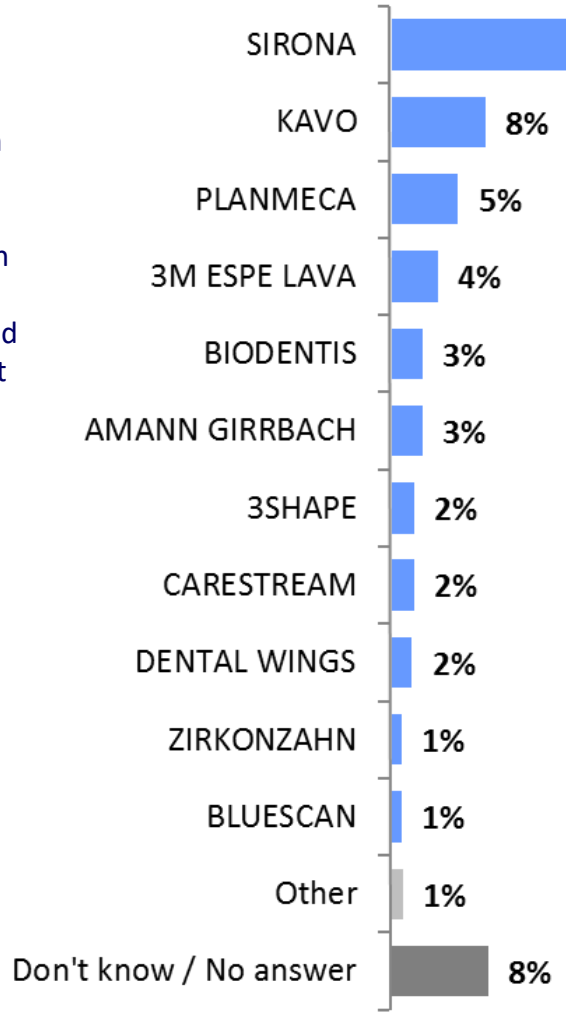
Numeric Distribution

It is the percentage of clients that mentioned to use a certain product / brand, or to get delivered by a certain supplier. That's why it is comparable with the coverage index, it is a subjective value, which is named by the clients as "their" product or "their" supplier.

Brand numeric distribution: Scanner/chairside milling

What intra oral scanner / chairside milling brand do you use?

Numeric Distribution
It is the percentage of clients that mentioned to use a certain product / brand, or to get delivered by a certain supplier. That's why it is comparable with the coverage index, it is a subjective value, which is named by the clients as "their" product or "their" supplier.



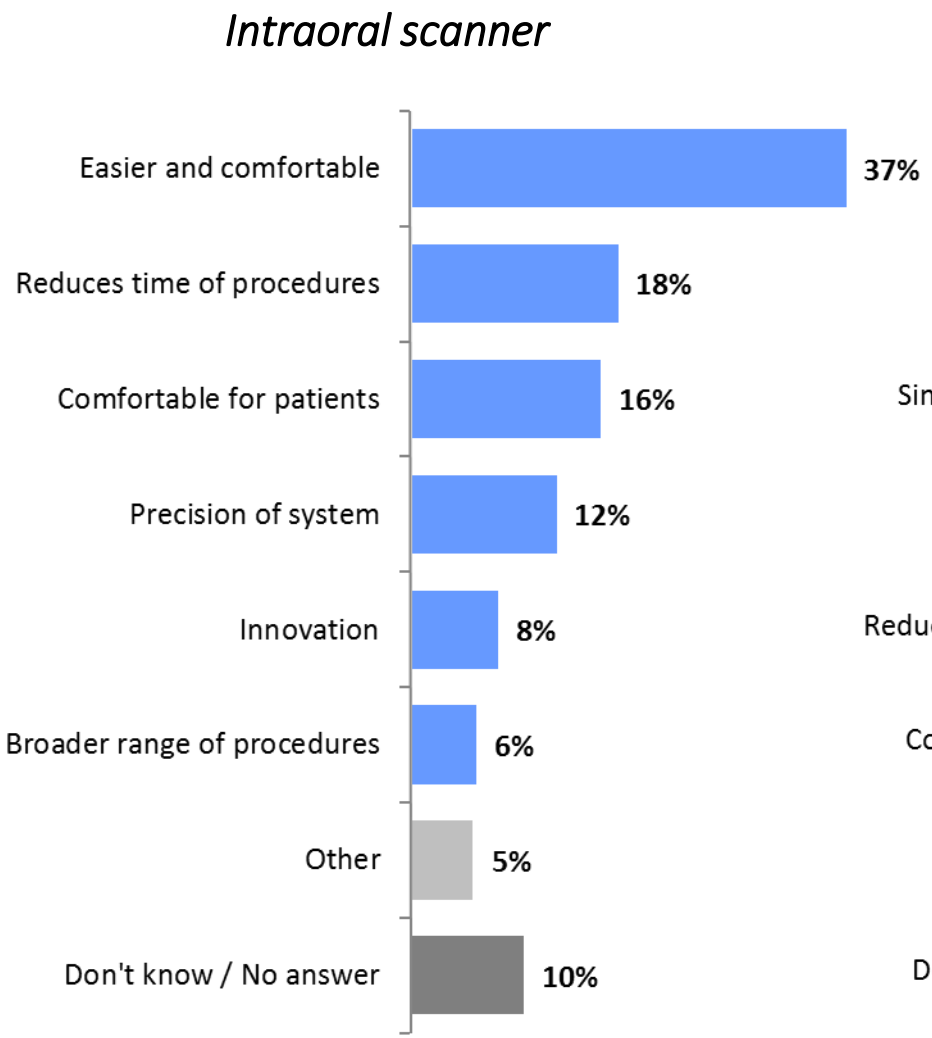
TOTAL		DE		FR	
SIRONA	66%	SIRONA	50%	SIRONA	64%
KAVO	8%	KAVO	17%	PLANMECA	9%
PLANMECA	5%	3M ESPE LAVA	8%	3M ESPE LAVA	9%
3M ESPE LAVA	4%	BIODENTIS	8%	CARESTREAM	9%
BIODENTIS	3%	AMANN GIRRBACH	8%		
AMANN GIRRBACH	3%				
3SHAPE	2%				
CARESTREAM	2%				
DENTAL WINGS	2%				
ZIRKONZAHN	1%				
BLUESCAN	1%				
Other	1%	Other	0%	Other	9%
Don't know / No answer	8%	Don't know / No answer	17%	Don't know / No answer	9%
Total	**62**	**Total**	**20**	**Total**	**8**

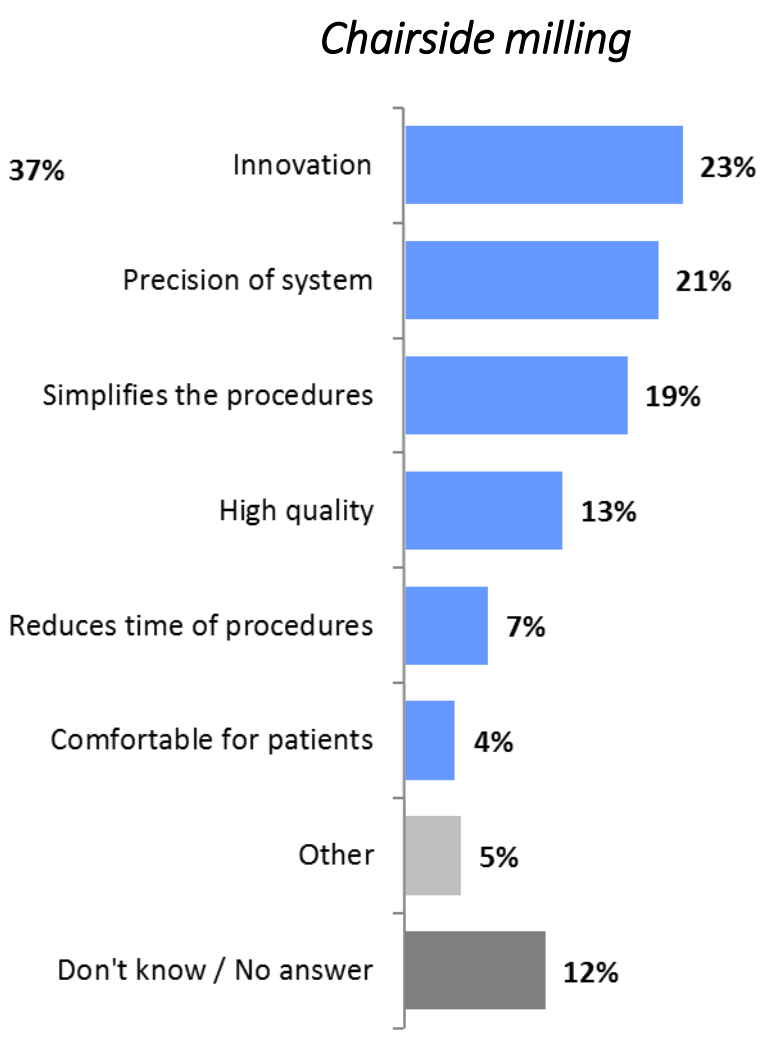
TOTAL		IT		SP		UK	
SIRONA	66%	SIRONA	75%	SIRONA	73%	SIRONA	90%
KAVO	8%	PLANMECA	13%	DENTAL WINGS	9%	CARESTREAM	10%
PLANMECA	5%	KAVO	6%	ZIRKONZAHN	9%	DENTAL WINGS	10%
3M ESPE LAVA	4%	3SHAPE	6%	BLUESCAN	9%		
BIODENTIS	3%						
AMANN GIRRBACH	3%						
3SHAPE	2%						
CARESTREAM	2%						
DENTAL WINGS	2%						
ZIRKONZAHN	1%						
BLUESCAN	1%						
Other	1%	Other	0%	Other	0%	Other	0%
Don't know / No answer	8%	Don't know / No answer	0%	Don't know / No answer	9%	Don't know / No answer	0%
Total	**62**	**Total**	**21**	**Total**	**7**	**Total**	**5**

Base: 62 cases

Brand numeric distribution: Reasons to use

What is the most relevant reason for you to use an intraoral scanner / chairside milling unit?





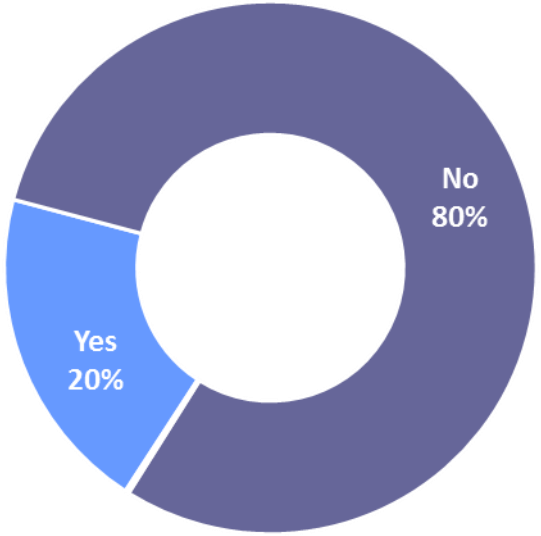
Chairside milling users state the precision and innovation to be among the most relevant reasons for use their equipment, while it's interesting enough to note that intraoral scanner users quote on the contrary the ease of use and the reduced time of procedure, in addition to the comfort for the patient.

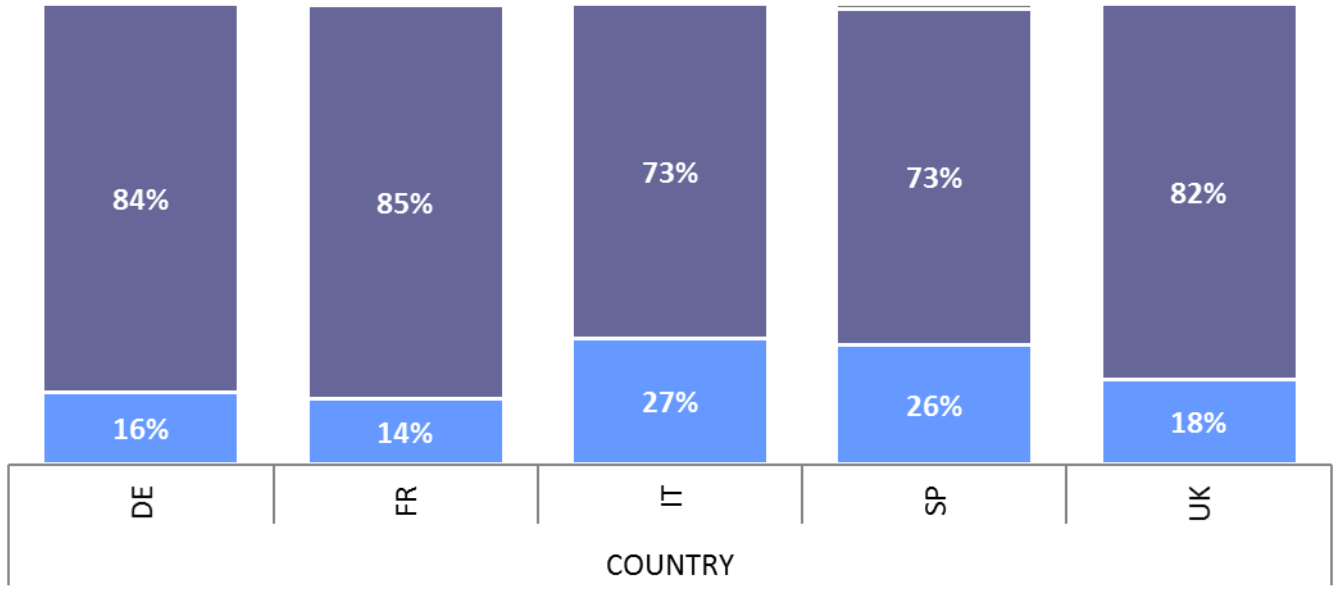
Base: 62 cases

Technology intention to buy: Intraoral scanner

Are you willing to purchase an intra-oral scanner within 2 years?

The intention to buy is not very low and it's quite homogeneous on the countries with slightly higher percentages in Italy and Spain.

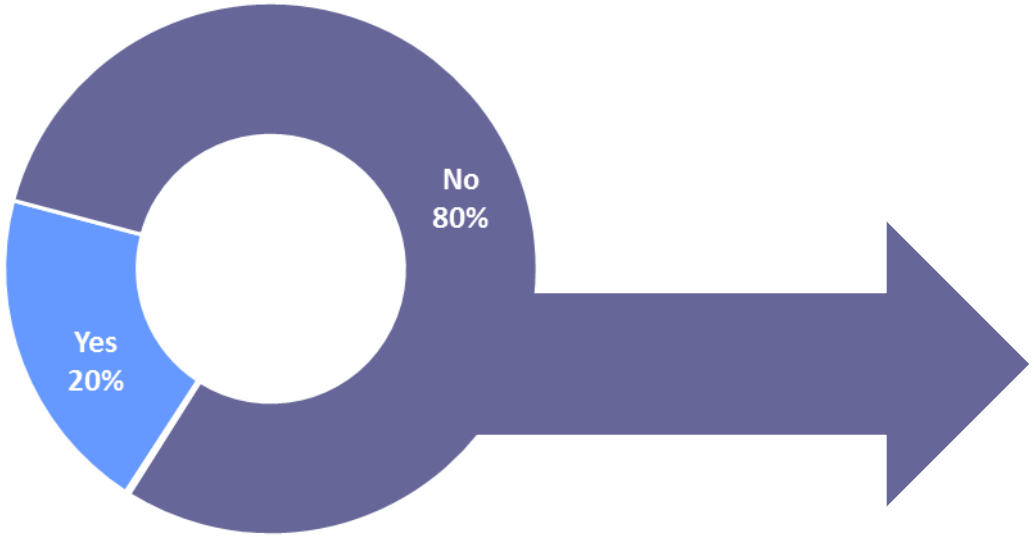


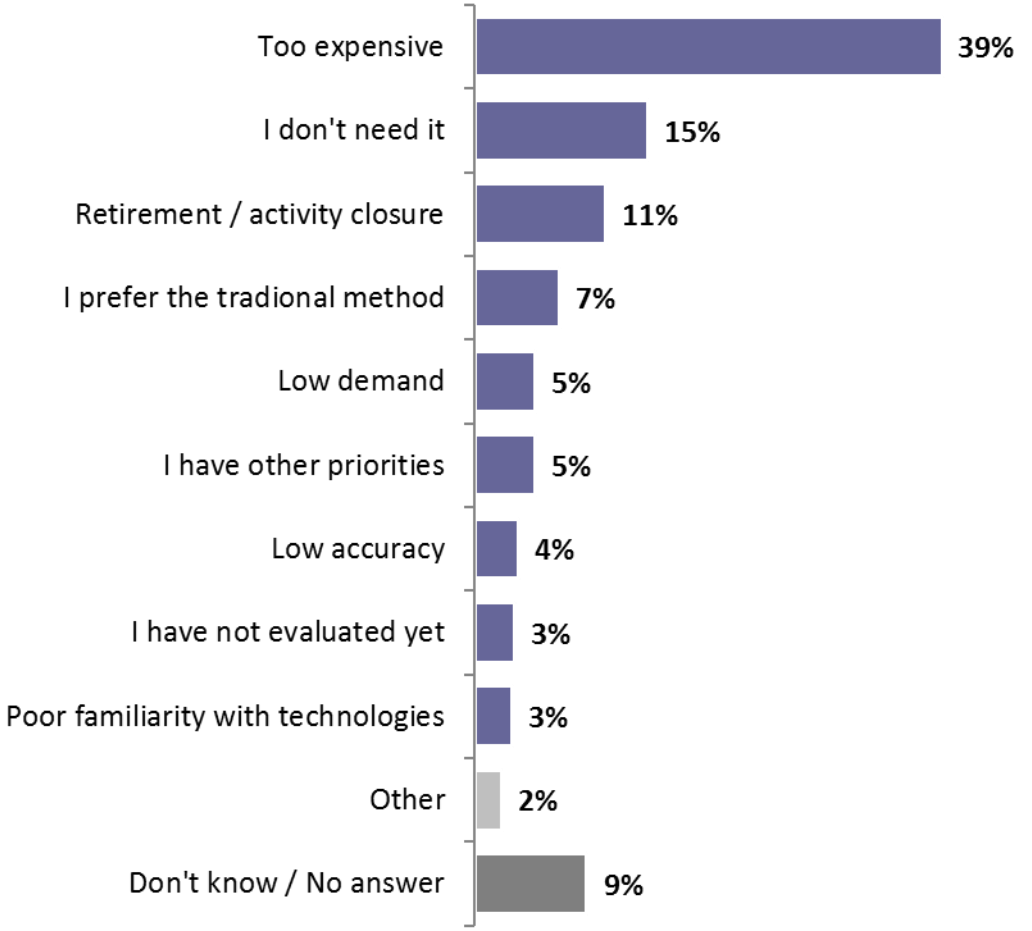


Base: 915 cases

Technology intention to buy: Intraoral scanner reasons why not

Are you willing to purchase an intra-oral scanner within 2 years? Why not?





Main reasons for not considering the purchase are the price and the lack of need. Important also the preference for the traditional method.

Base: 731 cases

Technology intention to buy: Intraoral scanner reasons why not

Are you willing to purchase an intra-oral scanner within 2 years? Why not?

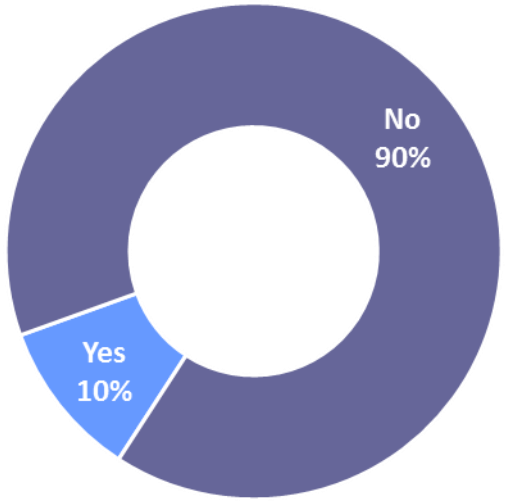
TOTAL		DE		FR		IT	
Too expensive	39%	Too expensive	48%	Retirement / activity closure	28%	Too expensive	32%
I don't need it	15%	I don't need it	19%	Too expensive	27%	Retirement / activity closure	17%
Rretirement/activity closure	11%	Low demand	6%	I don't need it	14%	I don't need it	10%
I prefer the tradional method	7%	I prefer the tradional method	5%	I have not evaluated yet	7%	I prefer the tradional method	10%
Low demand	5%	I have other priorities	3%	I have other priorities	7%	Poor familiarity with technologies	10%
I have other priorities	5%	Retirement / activity closure	1%	I prefer the tradional method	6%	Low accuracy	9%
Low accuracy	4%	Low accuracy	1%	Low accuracy	3%	I have other priorities	7%
I have not evaluated yet	3%	I have not evaluated yet	1%	Poor familiarity with technologies	3%	Low demand	6%
Poor familiarity with technologies	3%	Poor familiarity with technologies		Low demand	1%	I have not evaluated yet	2%
Other	2%	Other	3%	Other	2%	Other	2%
Don't know / No answer	9%	Don't know / No answer	15%	Don't know / No answer	4%	Don't know / No answer	2%
Total	**731**	**Total**	**255**	**Total**	**155**	**Total**	**171**

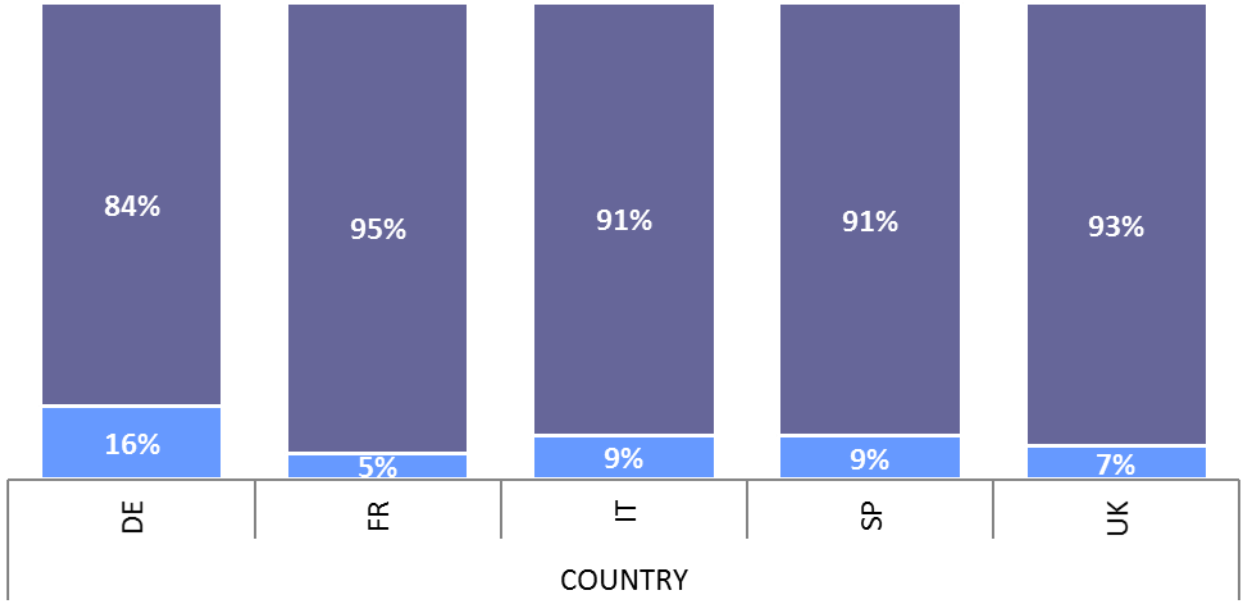
TOTAL		SP		UK	
Too expensive	39%	Too expensive	35%	Too expensive	59%
I don't need it	15%	I don't need it	11%	I don't need it	15%
Rretirement/activity closure	11%	I have other priorities	8%	I prefer the tradional method	9%
I prefer the tradional method	7%	I prefer the tradional method	8%	Low demand	5%
Low demand	5%	I have not evaluated yet	8%	Retirement / activity closure	4%
I have other priorities	5%	Low demand	7%	I have other priorities	1%
Low accuracy	4%	Low accuracy	3%	I have not evaluated yet	1%
I have not evaluated yet	3%	Retirement / activity closure	2%	Low accuracy	
Poor familiarity with technologies	3%	Poor familiarity with technologies	1%	Poor familiarity with technologies	
Other	2%	Other	2%	Other	3%
Don't know / No answer	9%	Don't know / No answer	18%	Don't know / No answer	8%
Total	**731**	**Total**	**90**	**Total**	**60**

Technology intention to buy: Chairside milling

Are you willing to purchase a chairside milling within 2 years?

The intention to buy a chairside milling is lower than the intraoral scanner, and the country with the high percentage is Germany.

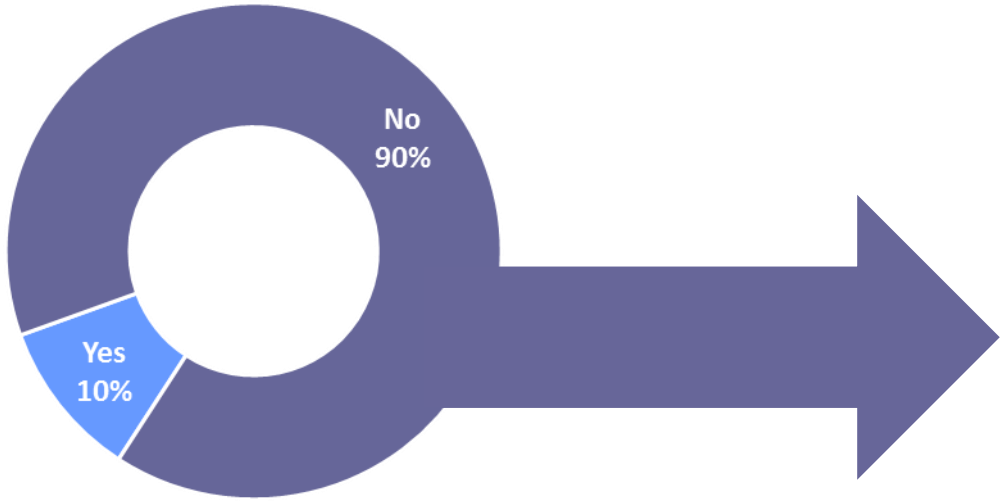


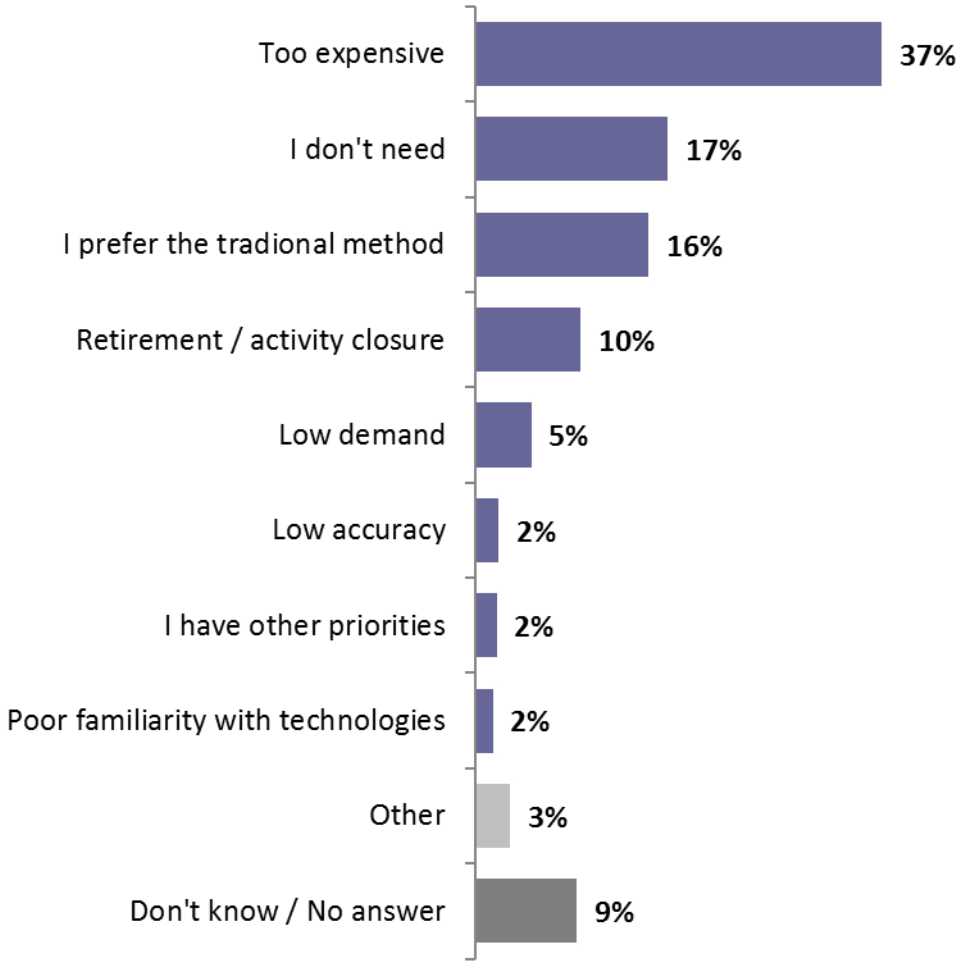


Base: 915 cases

Technology intention to buy: Chairside milling reasons why not

Are you willing to purchase a chairside milling within 2 years? Why not?





The main reason for not considering the purchase are almost the same seen for the intraoral scanner.

Base: 824 cases

Technology intention to buy: Chairside milling reasons why not

Are you willing to purchase a chairside milling within 2 years? Why not?

TOTAL	
Too expensive	37%
I don't need	17%
I prefer the tradional method	16%
Retirement / activity closure	10%
Low demand	5%
Low accuracy	2%
I have other priorities	2%
Poor familiarity with technologies	2%
Other	3%
Don't know / No answer	9%
Total	**824**

DE	
Too expensive	46%
I don't need	20%
I prefer the tradional method	7%
Low demand	6%
Low accuracy	1%
Retirement / activity closure	1%
I have other priorities	0%
Poor familiarity with technologies	0%
Other	5%
Don't know / No answer	16%
Total	**248**

FR	
Retirement / activity closure	27%
Too expensive	25%
I don't need	18%
I prefer the tradional method	16%
I have other priorities	5%
Low demand	3%
Poor familiarity with technologies	1%
Low accuracy	1%
Other	2%
Don't know / No answer	4%
Total	**171**

IT	
Too expensive	28%
I prefer the tradional method	26%
I don't need	13%
Retirement / activity closure	12%
Low accuracy	7%
Low demand	7%
Poor familiarity with technologies	5%
I have other priorities	3%
Other	1%
Don't know / No answer	1%
Total	**217**

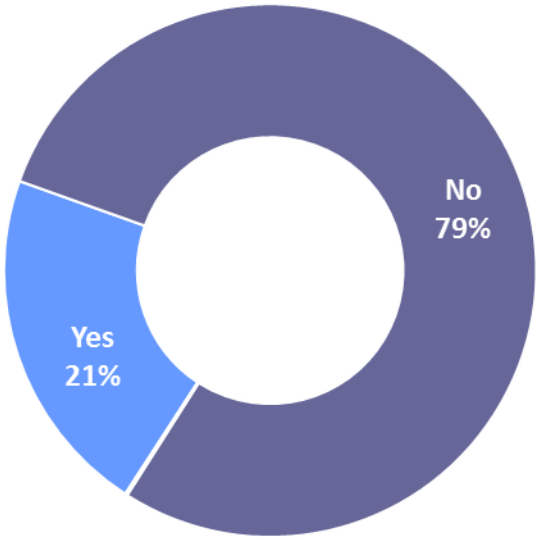
TOTAL	
Too expensive	37%
I don't need	17%
I prefer the tradional method	16%
Retirement / activity closure	10%
Low demand	5%
Low accuracy	2%
I have other priorities	2%
Poor familiarity with technologies	2%
Other	3%
Don't know / No answer	9%
Total	**824**

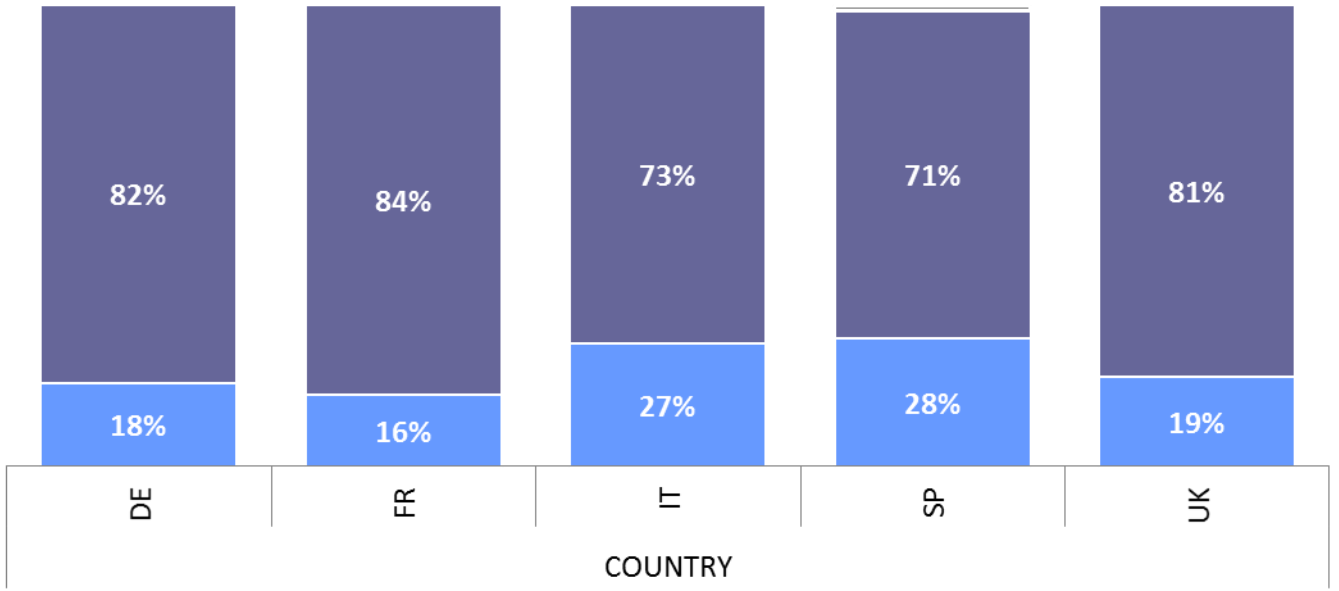
SP	
Too expensive	39%
I prefer the tradional method	20%
I don't need	16%
Low demand	4%
I have other priorities	2%
Retirement / activity closure	2%
Low accuracy	1%
Poor familiarity with technologies	1%
Other	2%
Don't know / No answer	16%
Total	**115**

UK	
Too expensive	55%
I don't need	20%
I prefer the tradional method	8%
Low demand	5%
Retirement / activity closure	5%
Poor familiarity with technologies	2%
I have other priorities	0%
Low accuracy	0%
Other	2%
Don't know / No answer	11%
Total	**69**

Technology intention to buy: Overall

Are you willing to purchase an intra-oral scanner/chairside milling within 2 years?

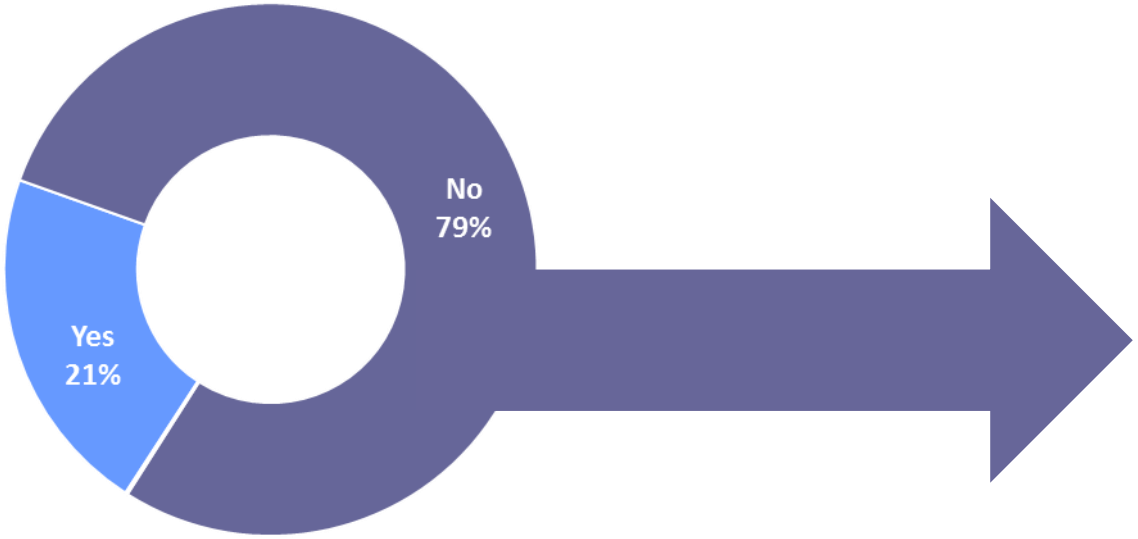


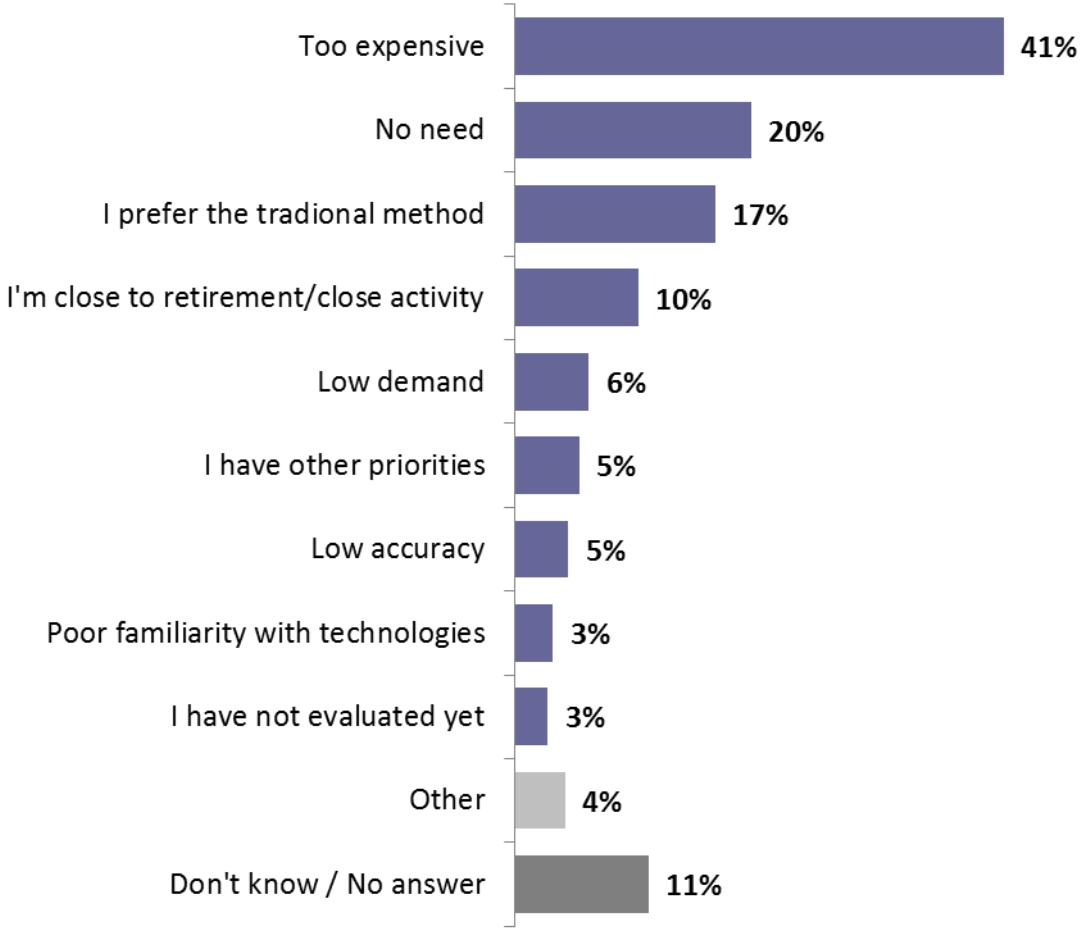


Base: 938 cases

Technology intention to buy: Overall reasons why not

Are you willing to purchase an intra-oral scanner/chairside milling within 2 years? Why not?





Base: 741 cases

Technology intention to buy: Overall reasons why not

Are you willing to purchase an intra-oral scanner/chairside milling within 2 years? Why not?

TOTAL	
Too expensive	41%
I don't need it	20%
I prefer the traditional method	17%
Retirement/activity closure	10%
Low demand	6%
I have other priority	5%
Low accurancy	5%
Poor familiarity with technologies	3%
I have not evalueted yet	3%
Other	4%
Don't know / No answer	11%
Total	**741**

DE	
Too expensive	48%
I don't need it	20%
I prefer the traditional method	8%
Low demand	6%
I have other priority	2%
Low accurancy	2%
Retirement/activity closure	1%
I have not evalueted yet	1%
Poor familiarity with technologies	0%
Other	6%
Don't know / No answer	17%
Total	**252**

FR	
Too expensive	30%
Retirement/activity closure	28%
I don't need it	24%
I prefer the traditional method	17%
I have other priority	9%
I have not evalueted yet	6%
Low demand	3%
Low accurancy	3%
Poor familiarity with technologies	3%
Other	4%
Don't know / No answer	6%
Total	**156**

IT	
Too expensive	34%
I prefer the traditional method	27%
I don't need it	15%
Retirement/activity closure	14%
Low accurancy	11%
Poor familiarity with technologies	9%
Low demand	8%
I have other priority	6%
I have not evalueted yet	1%
Other	3%
Don't know / No answer	3%
Total	**180**

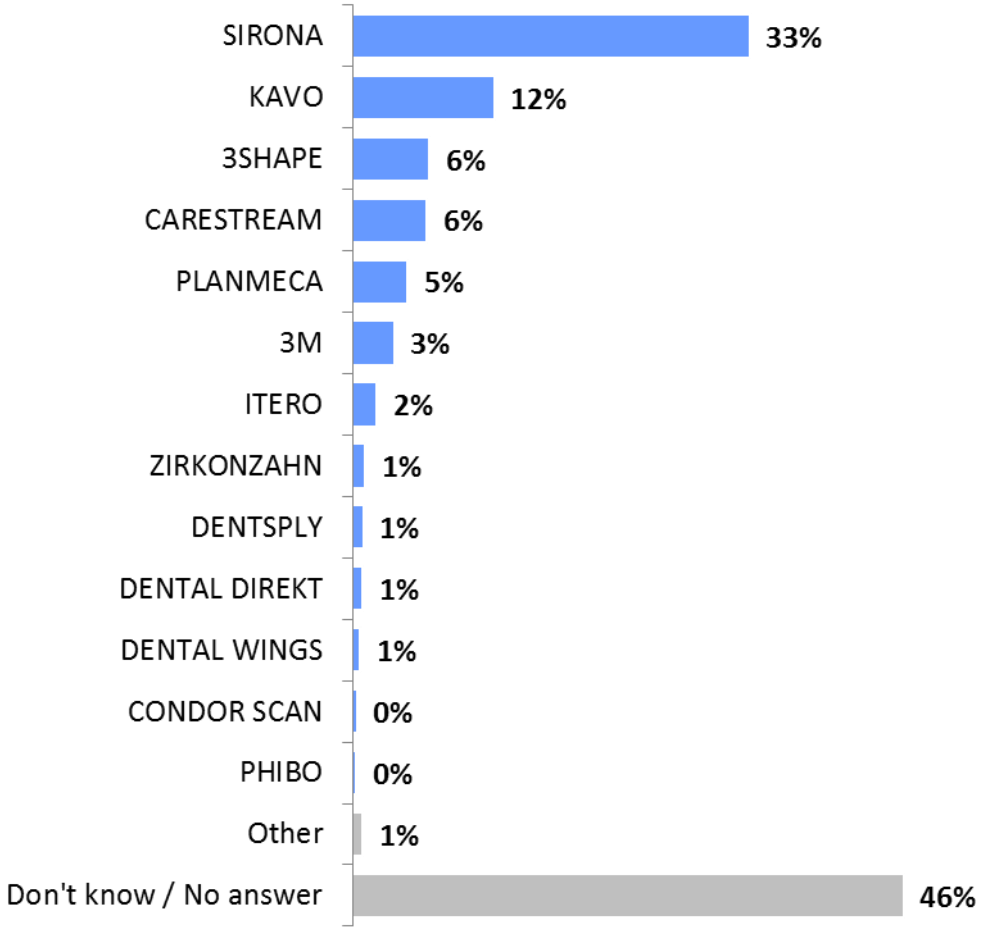
TOTAL	
Too expensive	41%
I don't need it	20%
I prefer the traditional method	17%
Retirement/activity closure	10%
Low demand	6%
I have other priority	5%
Low accurancy	5%
Poor familiarity with technologies	3%
I have not evalueted yet	3%
Other	4%
Don't know / No answer	11%
Total	**741**

SP	
Too expensive	43%
I prefer the traditional method	22%
I don't need it	19%
I have other priority	9%
Low demand	7%
I have not evalueted yet	6%
Low accurancy	3%
Retirement/activity closure	2%
Poor familiarity with technologies	1%
Other	3%
Don't know / No answer	21%
Total	**91**

UK	
Too expensive	60%
I don't need it	23%
I prefer the traditional method	11%
Low demand	7%
Retirement/activity closure	4%
I have other priority	1%
Poor familiarity with technologies	1%
I have not evalueted yet	1%
Low accurancy	0%
Other	4%
Don't know / No answer	12%
Total	**61**

Technology intention to buy: Brands evaluated for purchase

Are you willing to purchase an intra-oral scanner/chairside milling within 2 years? If yes, which brand?



The main brands among which the future buyers will make their own choice are about the same already seen in the numeric distribution, with the exception of 3shape which, in this case, is among the main followers.

Base: 197 cases

Satisfaction analysis and loyalty metrics

LOYALTY METRICS

OVERALL SATISFACTION

The overall experience with a company and the extent to which their needs are met.

PERCEIVED VALUE

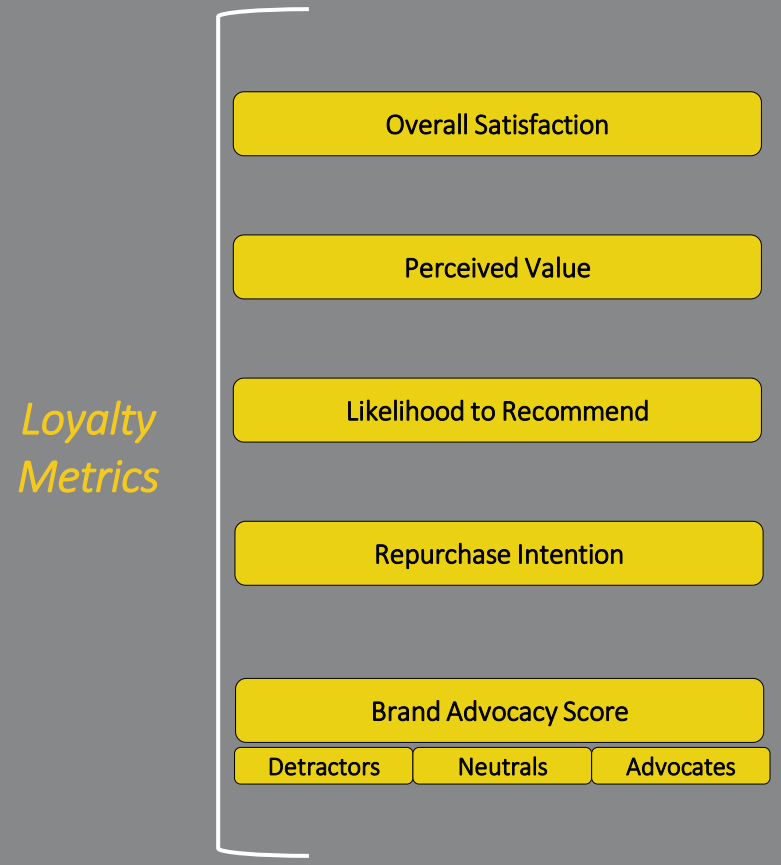
The utility and benefit of a product relative to the cost paid for that product.

ADVOCACY

A user's willingness to recommend a company to colleagues is a key driver of revenue and profit growth in most industries.

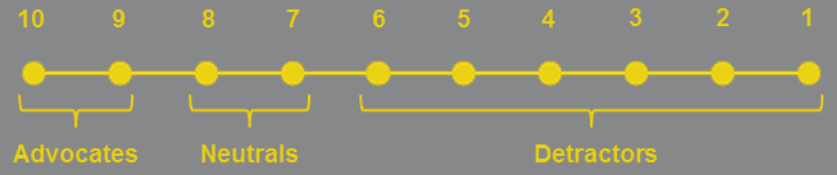
REPURCHASE INTENTION

The likelihood a user will continue to use a company's products in the near future.



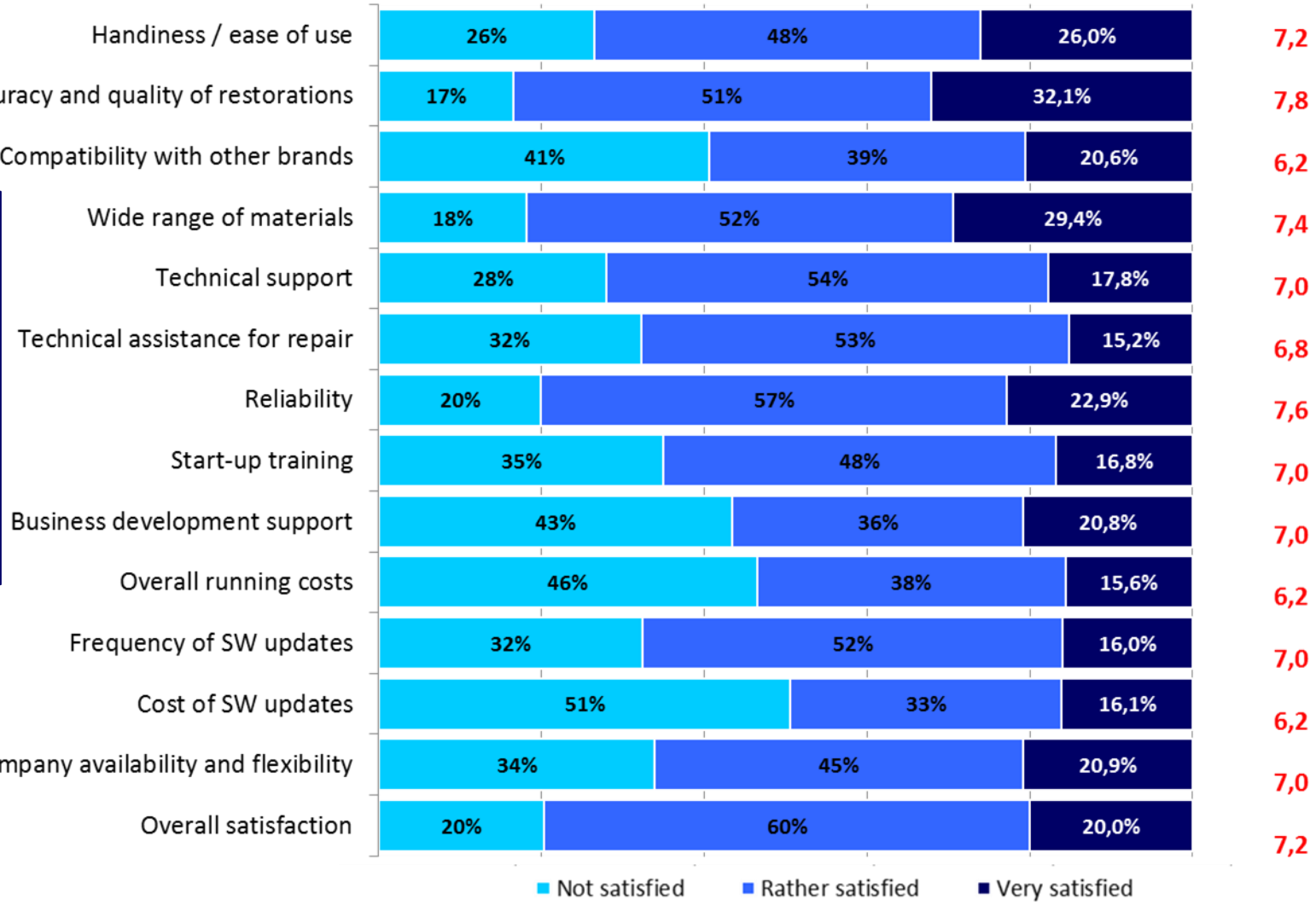
Brand Advocacy Score

Respondents are categorized as either "advocates", "neutrals", or "detractors" of each brand. For each brand overall, the BAS subtracts the percent share of detractors from the percent share of advocates, to show net impact on word-of-mouth referrals.



Satisfaction: Overall

Rate your satisfaction with the following CAD-CAM companies. Please use a scale where 1 represents "Completely not satisfied" and 10 represents "Completely satisfied."



NOTE
The 10 possible answers have been further clustered in order to better highlight the differences in the scores among the items and the brands evaluated. The clustering is the following:
Not satisfied: the scores grouped in this cluster are from 1 to 6.
Rather satisfied: the scores grouped in this cluster are from 7 to 8.
Very satisfied: the scores grouped in this cluster are from 9 to 10.

An additional data processing will be performed in order to investigate the different weight of the single items on the overall satisfaction, with the Bivariate Correlation analysis.

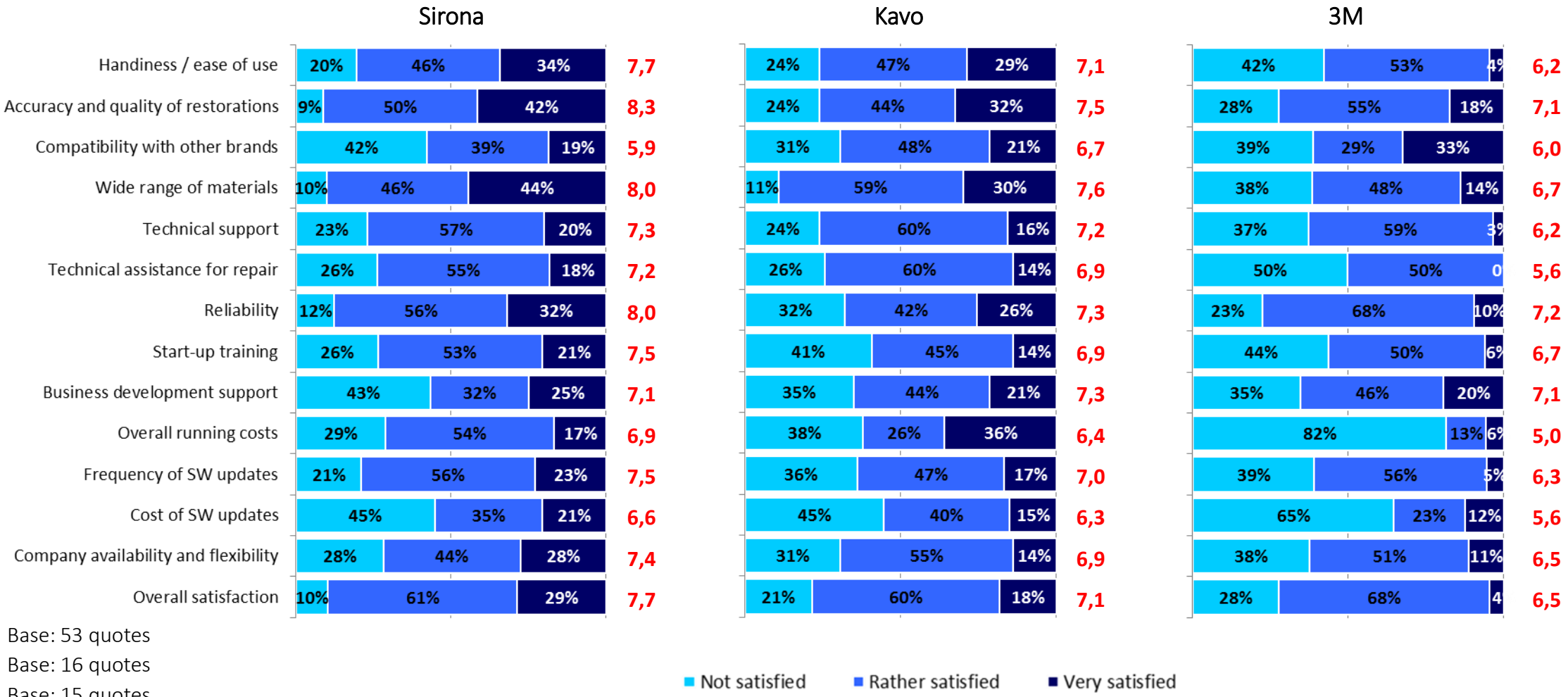
Processing without "dont know"

Base: 121 quotes

Satisfaction: Sirona, Kavo, 3M

Rate your satisfaction with the following CAD-CAM companies. Please use a scale where 1 represents "Completely not satisfied" and 10 represents "Completely satisfied."

Processing without "dont know"



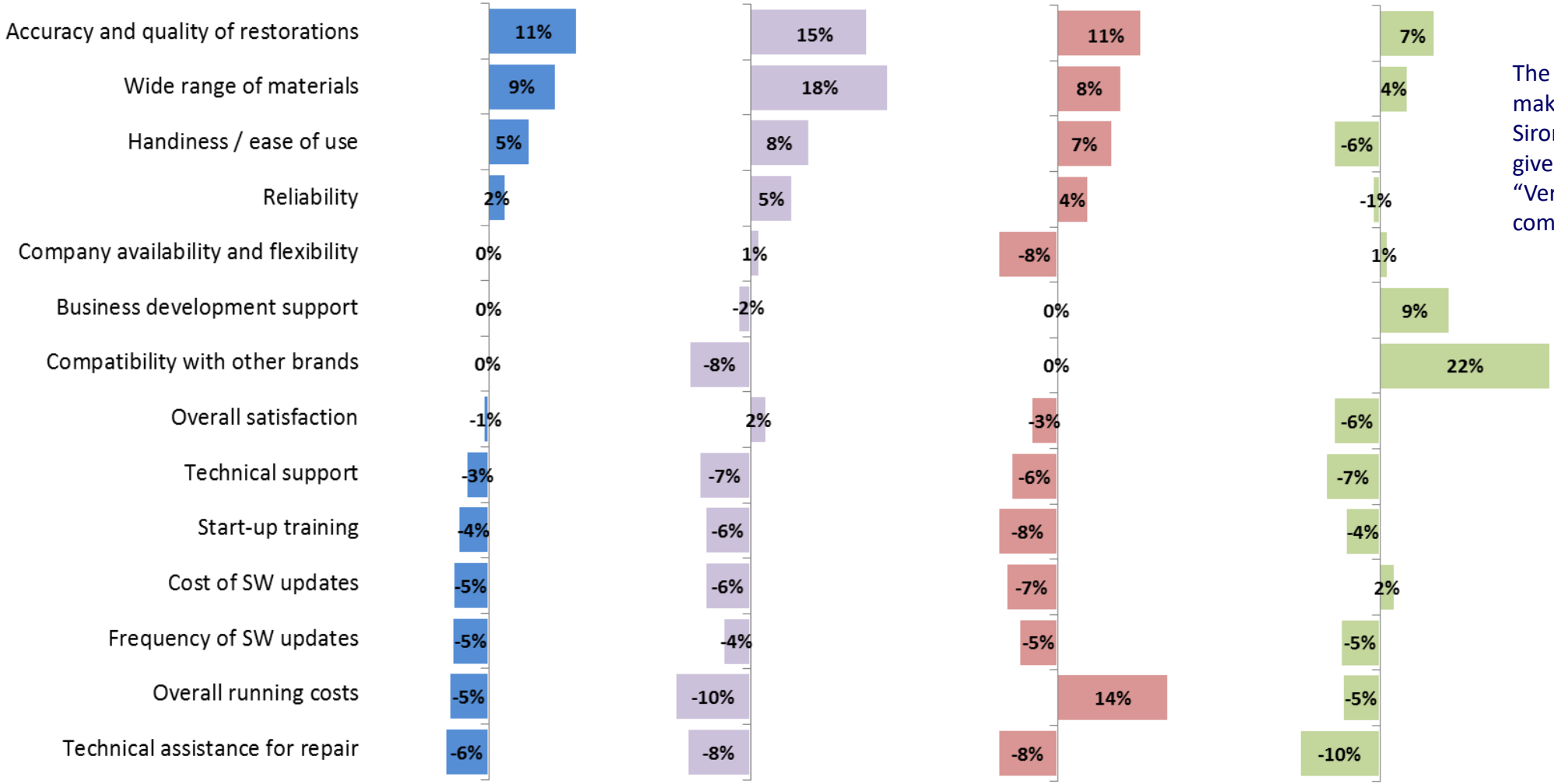
Base: 53 quotes

Base: 16 quotes

Base: 15 quotes

Satisfaction

Rate your satisfaction with the following CAD-CAM companies. Please use a scale where 1 represents "Completely not satisfied" and 10 represents "Completely satisfied."



Base: 121 quotes
Overall

Base: 53 quotes
Sirona

Base: 16 quotes
Kavo

Base: 15 quotes
3M

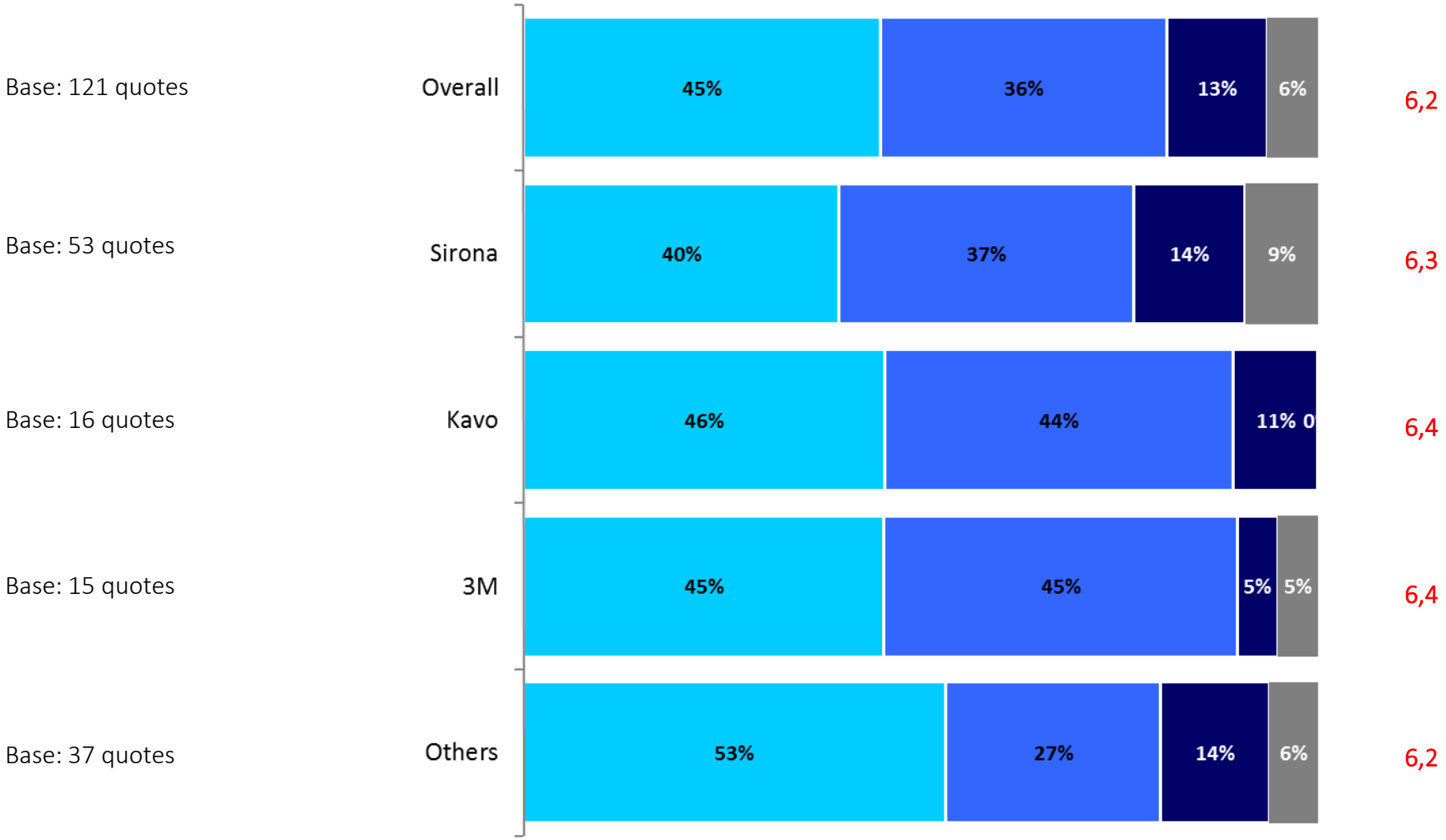
The reduced number of cases makes the analysis reliable for Sirona only, whose users look to give less than average ratings of "Very satisfied" on the compatibility with other brands.

Focus on COMPLETELY SATISFIED

Difference from mean «Completely satisfied»

Perceived value

To what extent would you agree that the CAD-CAM products of the following manufacturers are worth their purchasing price? Please use a scale where 1 represents "Strongly Disagree" and 10 represents "Strongly Agree".



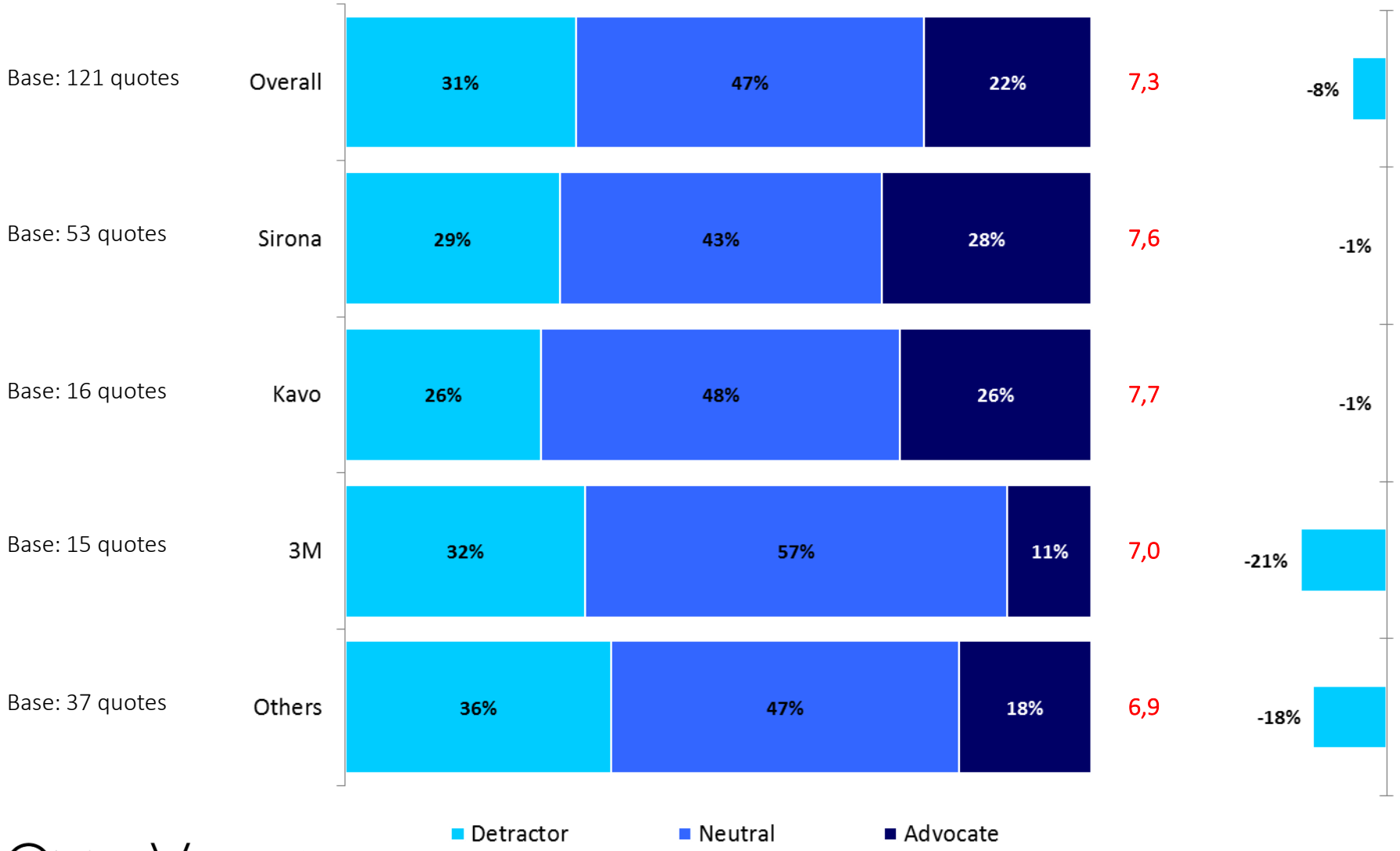
NOTE
The 10 possible answers have been further clustered in order to better highlight the differences in the scores among the brands evaluated. The clustering is the following:
Low Value/Price ratio: the scores grouped in this cluster are from 1 to 6.
Medium Value/Price ratio: the scores grouped in this cluster are from 7 to 8.
High Value/Price ratio: the scores grouped in this cluster are from 9 to 10.

The perceived value doesn't show any relevant difference among the investigated brands.

- Low Value/Price ratio
- Medium Value/Price ratio
- High Value/Price ratio
- Don't know

Recommendation: Brand Avocacy Score

How likely are you to recommend the following CAD-CAM companies to a colleague? Please use a scale where 1 represents "Extremely Unlikely" and 10 represents "Extremely Likely."



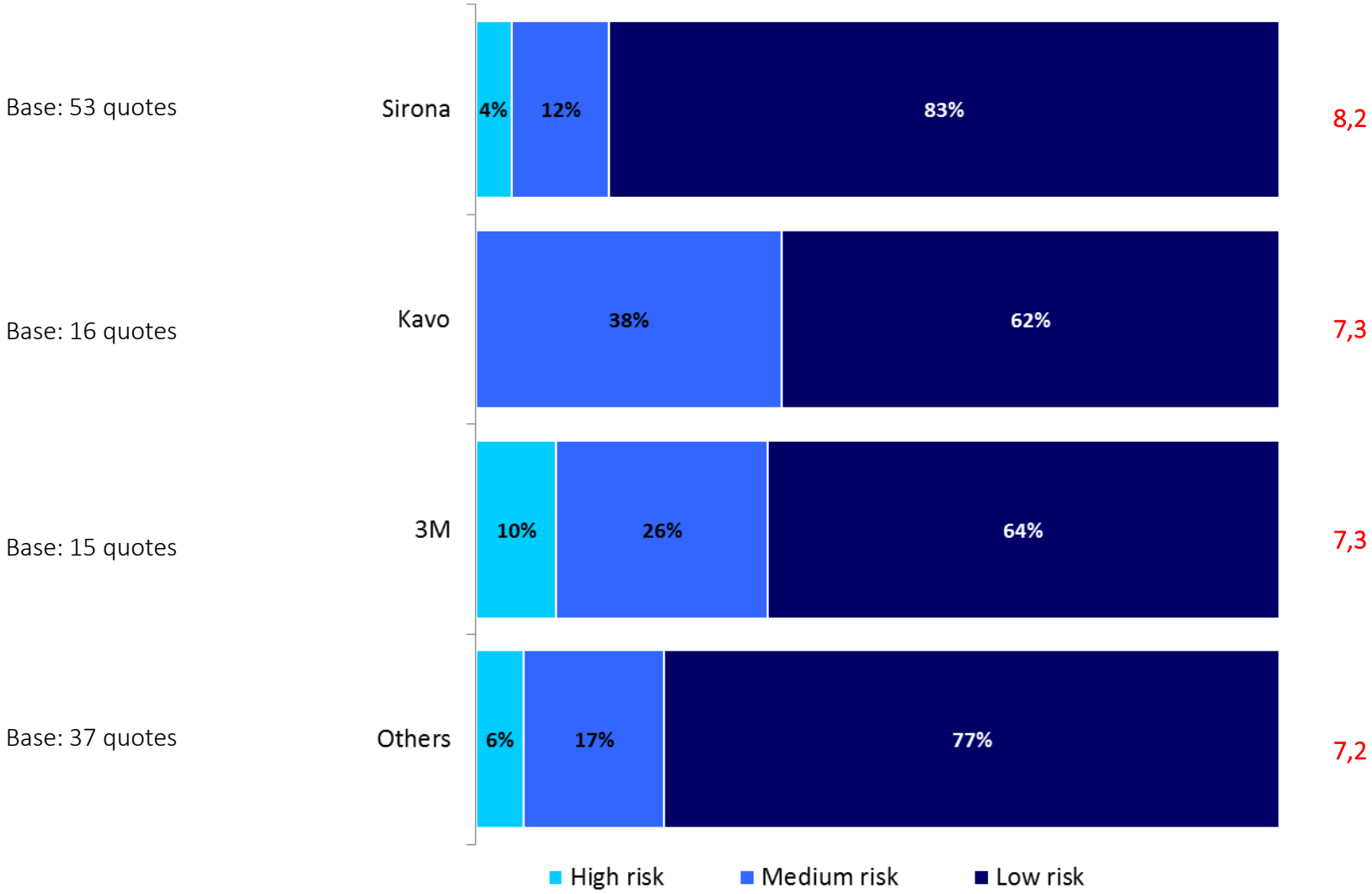
NOTE
The 10 possible answers have been further clustered in order to better highlight the differences in the scores among the brands evaluated. The clustering is the following:
Detractor: the scores grouped in this cluster are from 1 to 6.
Neutral: the scores grouped in this cluster are from 7 to 8.
Advocate: the scores grouped in this cluster are from 9 to 10.

Brand Advocacy Score
Respondents are categorized as either "advocates", "neutrals", or "detractors" of each brand. For each brand overall, the BAS subtracts the percent share of detractors from the percent share of advocates, to show net impact on word-of-mouth referrals.
It's interesting to note the rather high number of "neutrals", while, in the case of Sirona and Kavo, the portion of "Advocates" is as much as the one of the "Detractors".

Processing without "dont know"

Repurchase intention

5 years from now, how likely are you to still be using the following CAD-CAM companies' products? Please use a scale where 1 represents "Definitely Will Not Be Using" and 10 represents "Definitely Will Be Using."



NOTE
The 10 possible answers have been further clustered in order to better highlight the differences in the scores among the brands evaluated. The clustering is the following:
High Risk: the scores grouped in this cluster are from 1 to 3.
Medium Risk: the scores grouped in this cluster are from 4 to 6.
Low Risk: the scores grouped in this cluster are from 7 to 10.

The defection risk derives from the assumption that a low value of repurchase intention may mean a risk that in the future the product will not be used anymore. Lower scores in the repurchase intention bear a higher defection risk, while higher scores mean that a current customer will probably still be using that product also in the future.

Sirona shows a rather higher percentage of Low risk, compared to the main competitors, even though the number of the other brands is quite low to allow a reliable analysis.

Processing without "don't know"

Loyalty metrics compared

Focus on mean

Satisfaction, Perceived value, Advocacy, Repurchase intention

Customer Satisfaction

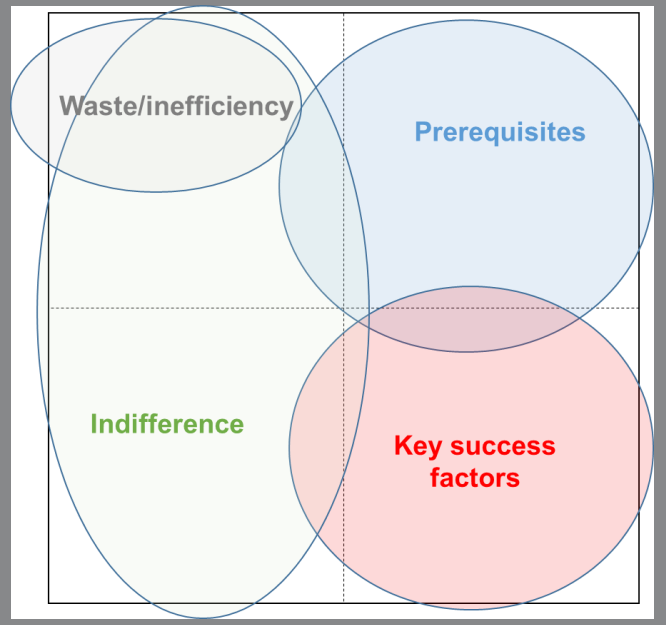
In-depth analysis

Customer satisfaction - Correlation analysis

The considerations coming from the bivariate analysis, allow us to highlight some important issues. The items have a different meaning according to the point of view with which they are considered: the satisfaction related to the whole market or the satisfaction related to a single product/brand.

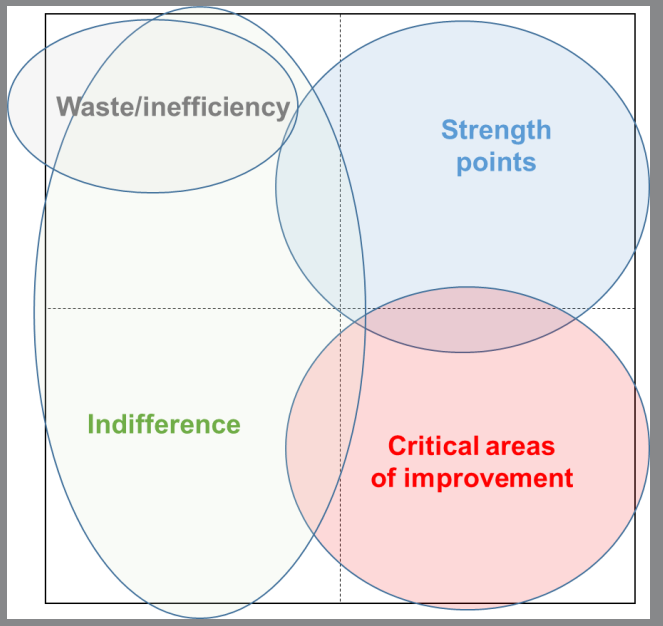
Satisfaction related to the whole market

Here we can highlight some prerequisites (upper-right corner of the map, where almost all the competitors satisfy the market), some key factors of success (lower-right corner of the map, where companies are not always able to satisfy customers with regard to strategic issues), and indifference areas (lower-left side of the map) which become waste/not efficient areas when a company decides to invest in those items belonging to the upper-left side of the map since, they tends to satisfy the market but they actually don't affect the overall satisfaction at all.



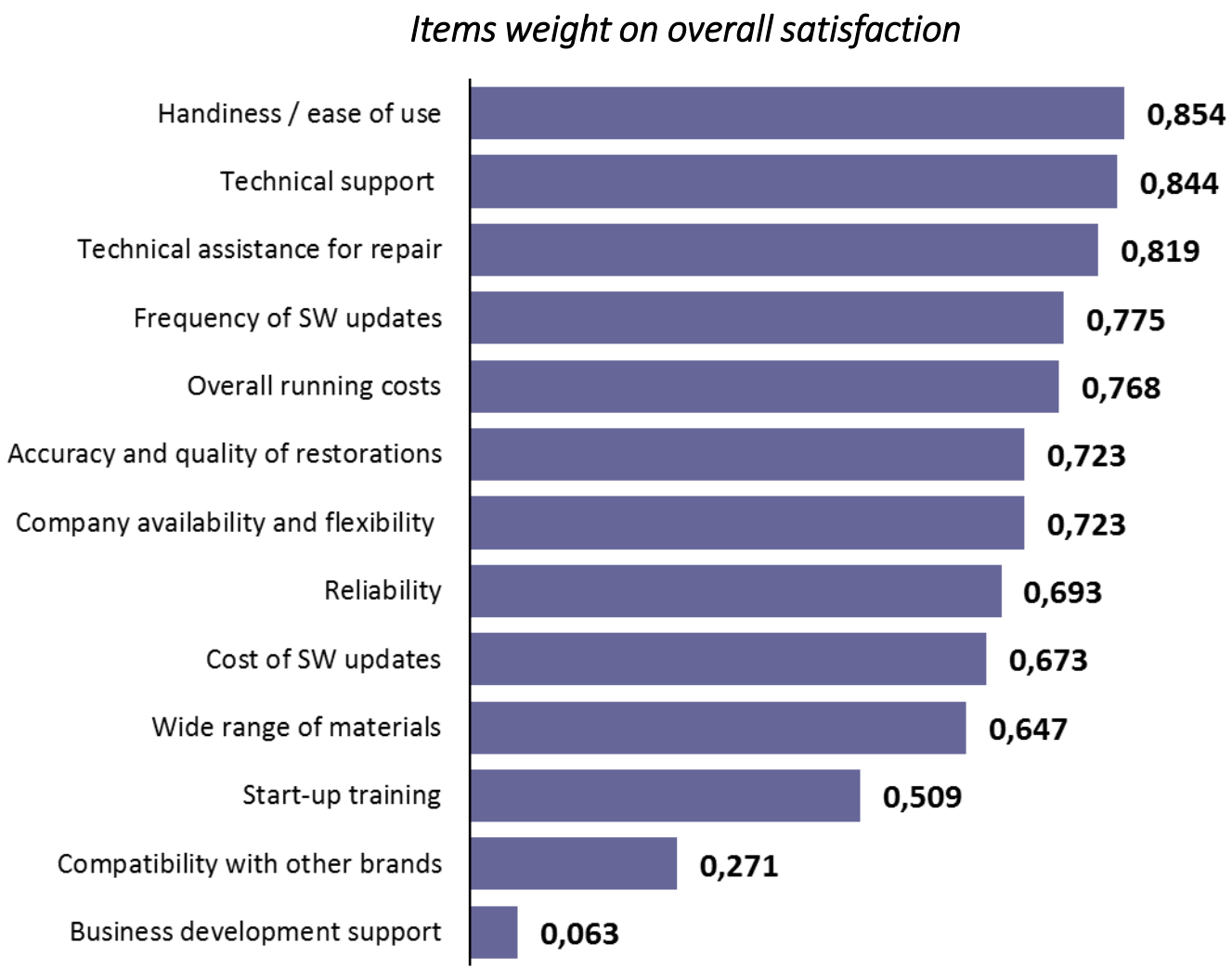
Satisfaction related to a specific company/product

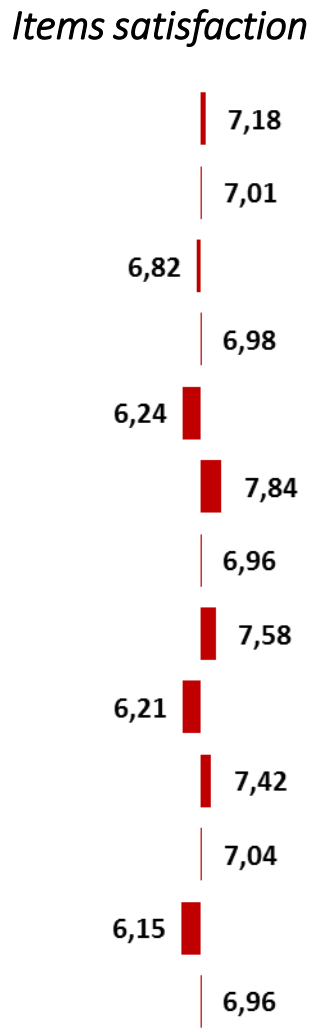
Here the scheme is the same, but we can highlight the strength points in the upper-right side of the map, which can determine inefficiency or low differentiation if placed in the left side of the map. In the lower-right we can note an improvement area, where we can find the weak points of a certain company.



Customer satisfaction - Correlation analysis

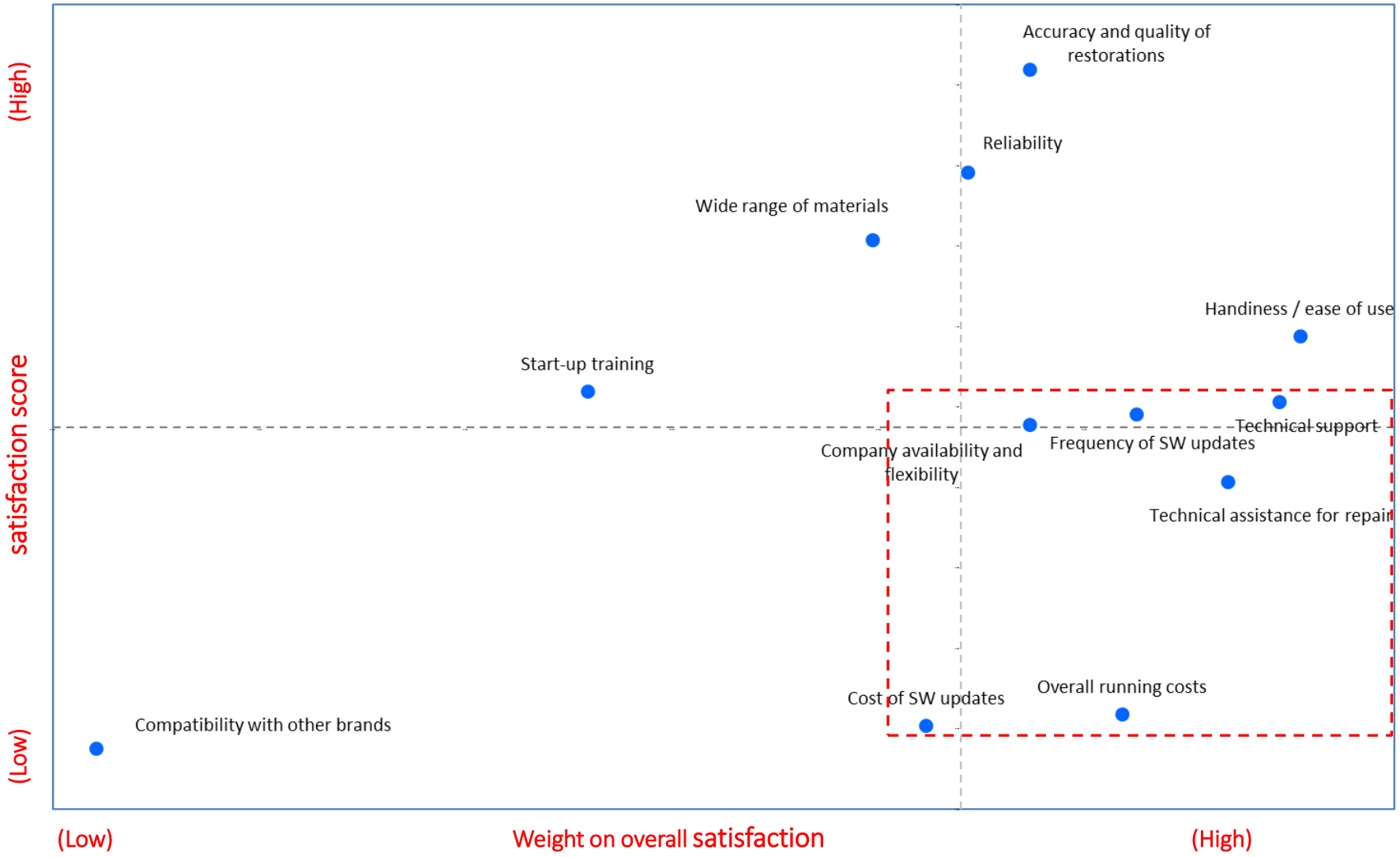
How much are worth the single items on the overall satisfaction?





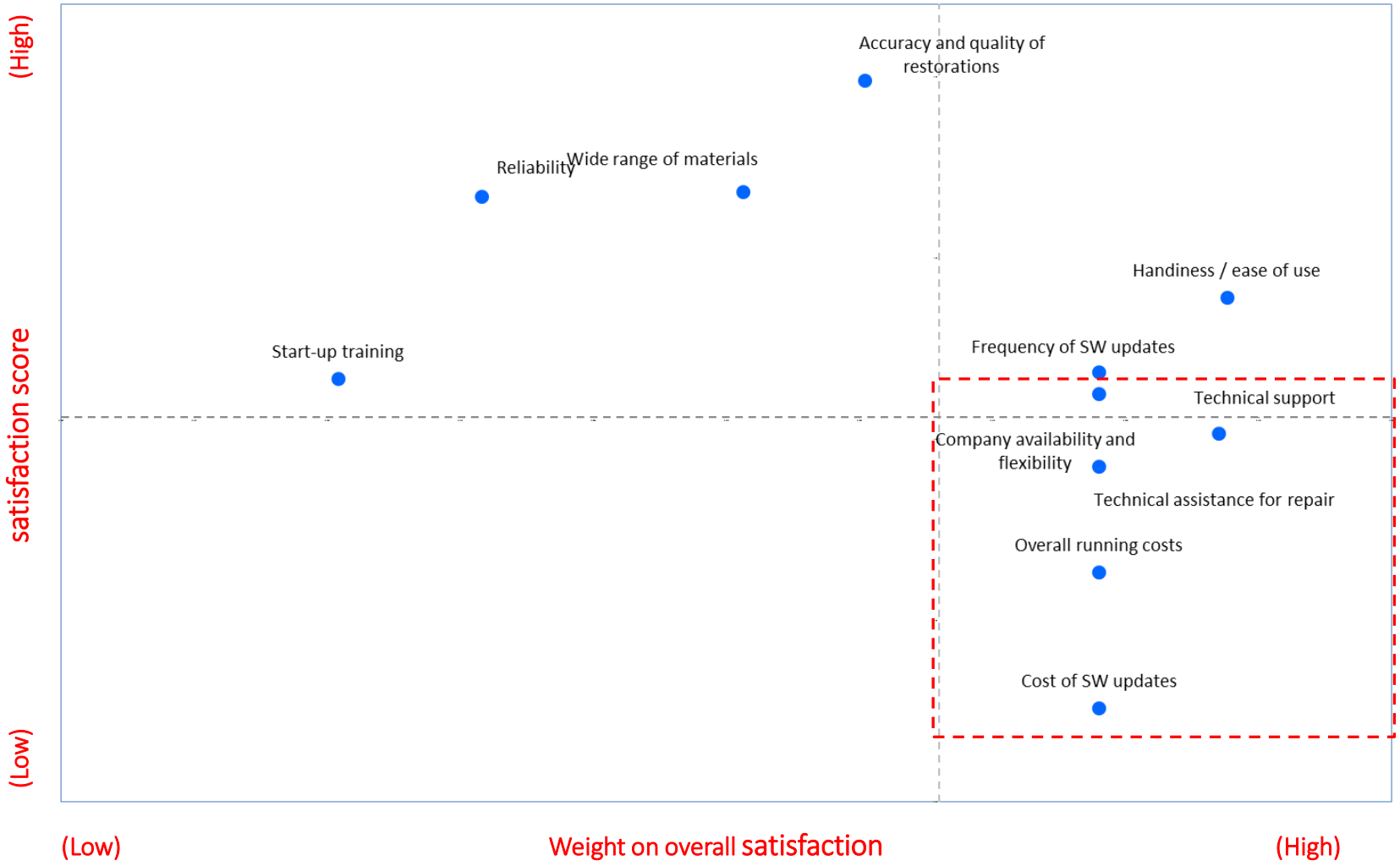
When assessing the weight of the different items on the overall satisfaction, the Business support was found to be not very relevant and we decided to exclude it from the subsequent factor analysis.

Customer satisfaction - Correlation analysis Overall



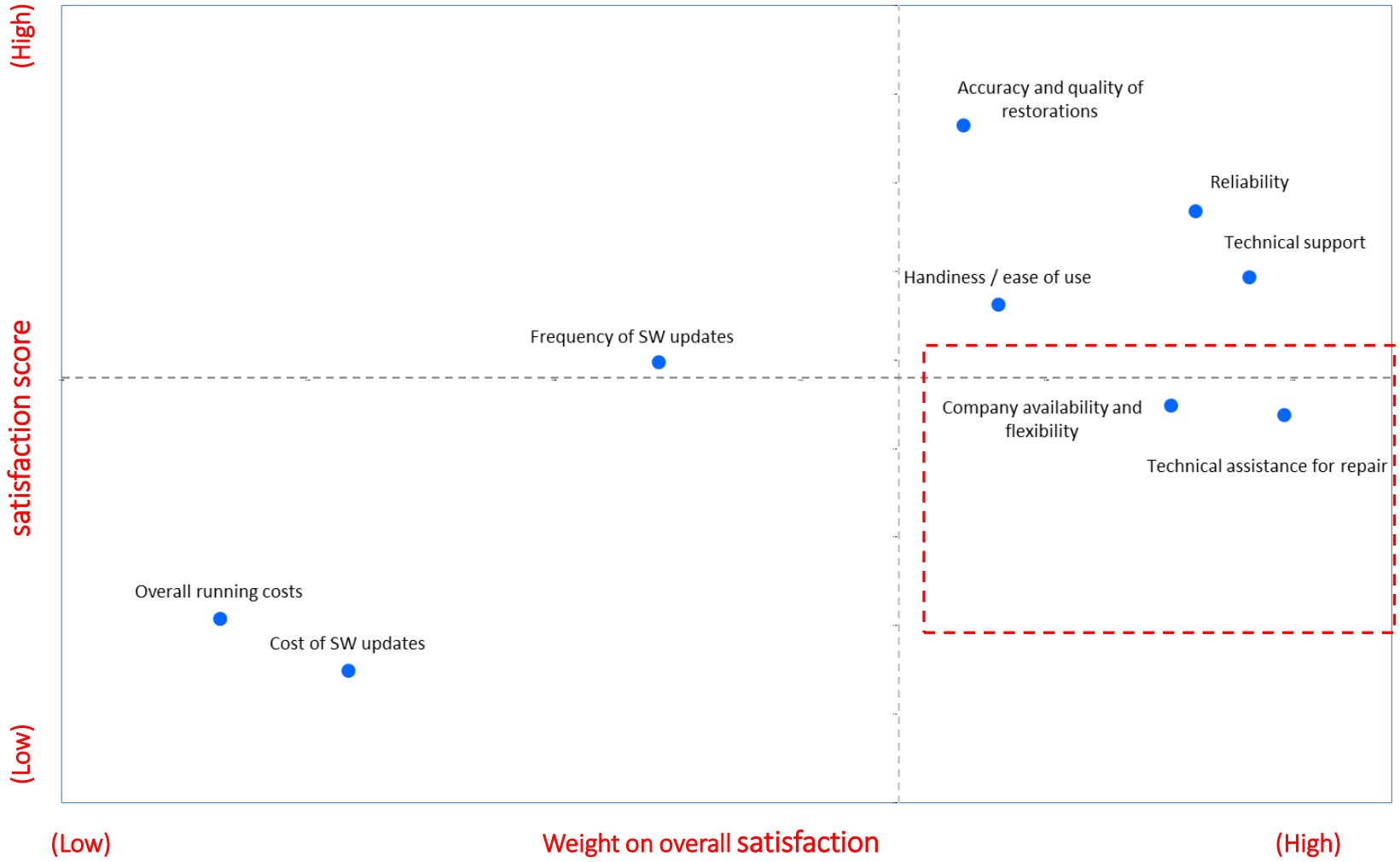
It is very interesting to see how the key components, being crucial in the determination of the overall satisfaction, all belong to "service" items and a crucial role is played by the running costs of the digital technologies, not properly related to the purchasing price.

Customer satisfaction - Correlation analysis SIRONA



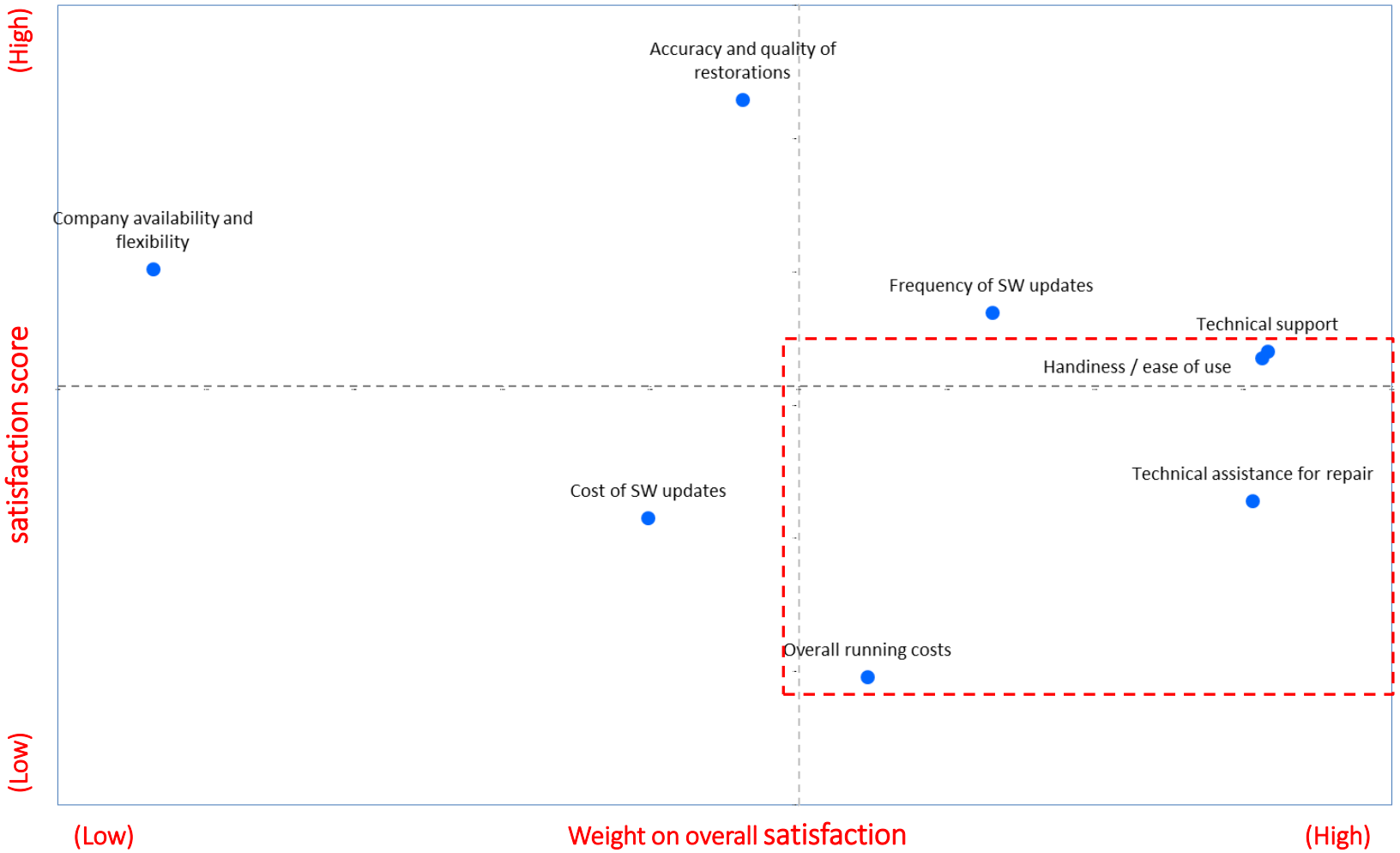
Sirona brand has a relevant role, as it is by far the most quoted brand and to a certain extent affects the overall analysis, most of all in the customer satisfaction.
That is no surprise that several main components seen in the overall results are also present in this map.

Customer satisfaction - Correlation analysis KAVO



Kavo users feel the overall running costs not to be a crucial topic, but they are looking at “softer” items, like Assistance and Flexibility of the Brand.

Customer satisfaction - Correlation analysis 3M



Among the most crucial items there are the overall running costs and the technical assistance.
The handiness and ease of use are also crucial items.

Customer satisfaction: Factor analysis

The reduction into factors allowed us to obtain 4 main drivers, **"Product and service quality", "Easy practice", "Management costs", "Compatibility".**

Factor 1 (Product and service quality) it is related to the intrinsic qualities of the product, (which in this case is very different from the usual analysis on consumable products) and to services strictly related to it. Seldom is possible to see an item in the factor analysis which carries together items related to the product component and to the service as well. In this case, the technical assistance and the SW updates go hand in hand with the accuracy and the ease of use.

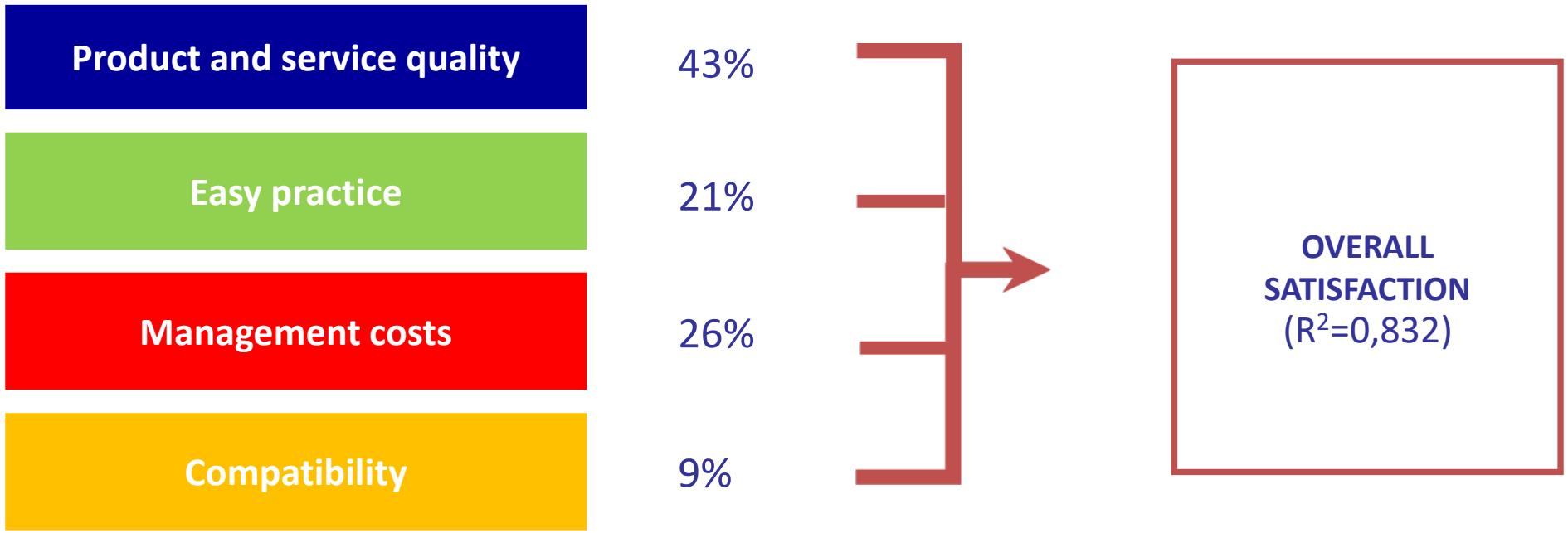
Factor 2 (Easy practice) the second factor has some soft components related to the grade of availability the company has to make the daily practice easy in the use of the digital technologies. This is true, according to the results of this analysis, when a company gives support in starting up the digital business, when the company is available and flexible and a wide range of materials is available. All of that, makes a company look reliable as well.

4 Factors	Product and service quality	Easy practice	Management costs	Compatibility
Technical support from the company	0,844			
Technical assistance in case of repair	0,810			
Accuracy and overall quality of the restorations	0,779			
Handiness / ease of use	0,778			
Frequency of SW updates from the company	0,729			
Start-up training		0,800		
Wide range of materials available		0,774		
Availability and flexibility of the company		0,672		
Reliability		0,552		
Cost of SW updates			0,822	
Overall running costs			0,605	
Compatibility with other brands				0,907

Factor 3 (Management costs) not to forget that the new digital technologies can be considered a business of the practice, so that the management costs are also important to make this business profitable for the practice. In this sense, the running costs and the cost for SW updates make a separate factor accounting for the overall satisfaction. This factor has not to be confused with the cost for acquiring a digital equipment, but clearly, the ordinary costs, sustained every year to run the digital business do have their own importance.

Factor 4 (Compatibility) The fourth and last factor is strictly related to the compatibility of the system with other systems, which allows for a easy way to expand the business and meet the needs from the patients. An open systems surely helps the users to be more flexible and ready to face the different situations that digital restorations shows.

Customer satisfaction: Multiple regression analysis



What seen in the factor analysis takes here an assessment with regard to the importance that the multiple regression analysis highlights the single factors may have in determining the overall satisfaction.

The value of R2 is really high in this analysis (0,832), so that we are pretty sure that almost all satisfaction can be explained by the items contained in the factors here shown.

The item with the most relevant importance looks to be “Product and service quality” accounting for 43% of the total satisfaction. It is quite obvious to see this, as the list of items contained in this item are very important features (just like said before, they are related to both the product and the service), and the overall satisfaction cannot be considered regardless those items and, consequently, this factor.

What strikes the attention the most is the third item “Management costs”, which accounts for 26% and it is the second most important factor in the assessment of the overall satisfaction. It is clear how issues like Cost of SW updates and more generally running costs are considered to be quite important.

Not far from the “Management costs” factor, the third most important one is “Easy practice” accounting for 21% of the overall satisfaction. The way a company helps professionals to get the digital business started in a easy and quick way, accounts for a relevant portion in assessing the overall satisfaction.

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