

Eye on the Industry

Distribution of Elective and Non-Elective Dental Procedures

DentalMarketIQ® Market Analysis

March 24, 2020



Eye on the Industry Market Analysis

Distribution of Elective and Non-Elective Dental Procedures

Overview

Given the current COVID-19 crisis, DentalMarketIQ is leveraging the company resources to support dental stakeholders' understanding of the impact of COVID-19 on the dental market, including specific questions we've been asked by our colleagues. We hope to produce and share more insightful information and metrics/observations over the next few days.

Question: What is the distribution of elective and non-elective dental procedures?

Based on the insights from the ADA and other professional organizations, our Chief Dental Officer, Dr. Michael Fiorenza, in collaboration with the DentalMarketIQ clinical team, has identified the specific procedures that would generally be non-elective. Our Chief Analytics Officer, Tim Downey, has reviewed the DentaBase® national procedures year-over-year and we have identified that 17.7% of the procedures in 2019 were highly likely/probably non-elective.

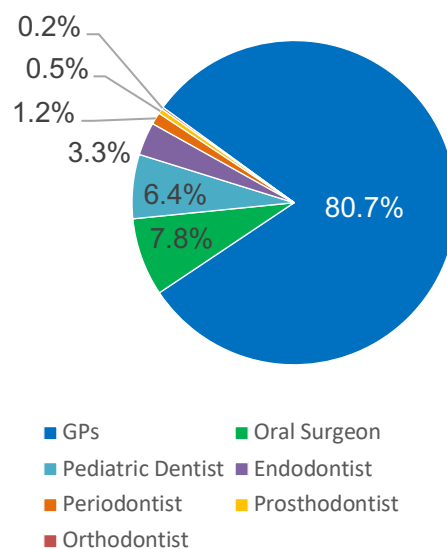
These procedures accounted for 9.8% of the dental treatment billings/fees for all dental services.

The majority (87%) of the non-elective procedures are performed by GPs and PDs. Overall, the non-elective procedures delivered through other specialties represent 13% of the total.

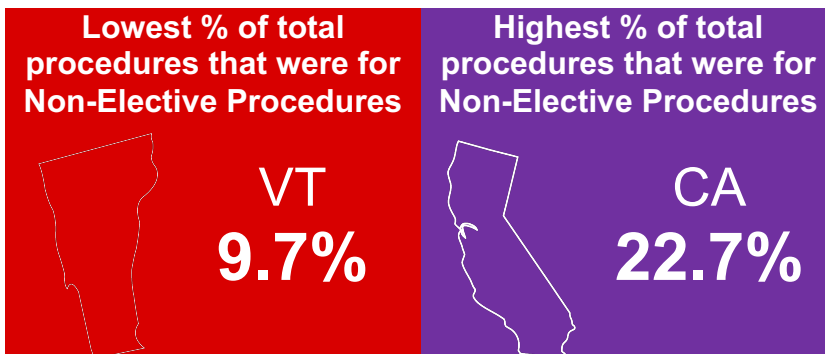
All procedures have been classified as Highly Likely to be Non-Elective, Probably Non-Elective, Possibly Non-Elective, and Unlikely to be Non-Elective based on clinical insights. Public programs are not included in this review and may have higher percentages of non-elective procedures.

17.7%
of procedures
in 2019
were highly
likely/probably
non-elective

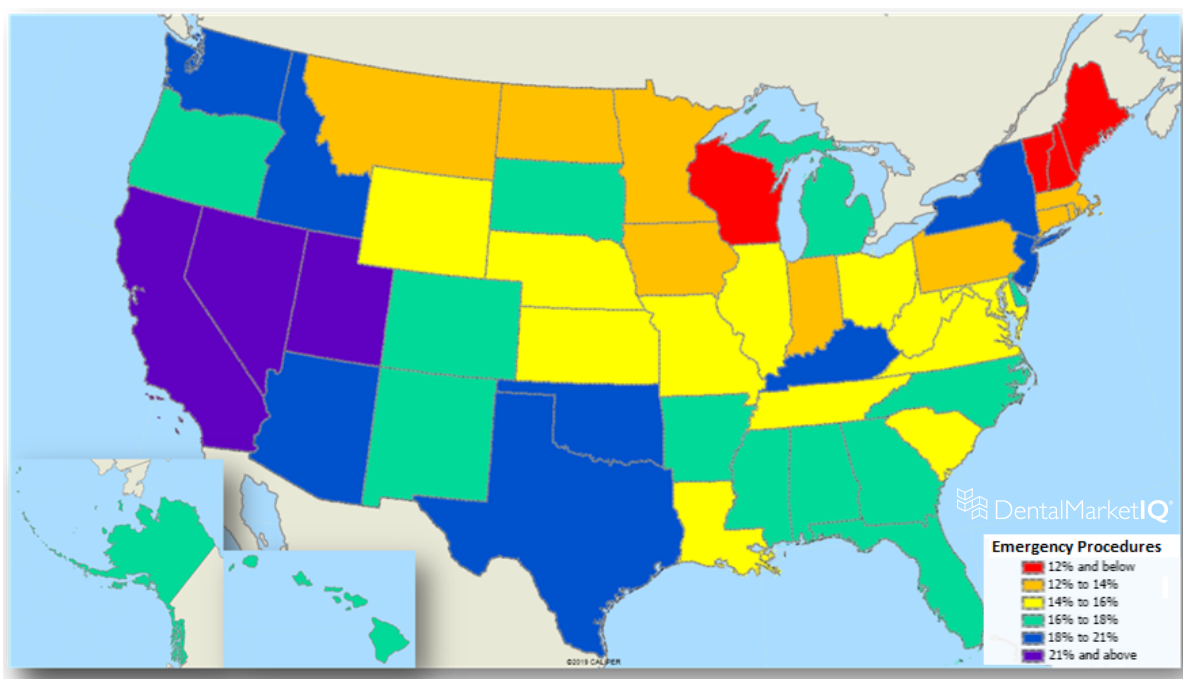
Non-elective Procedures Delivered by Specialty



At the state level, non-elective percentages vary by state and range from a **low of 9.7%** to a **high of 22.7%**.



Below is a quick look at the national distribution of the 2019 non-elective procedures by state:



Following the ADA guidance recommending temporarily limiting procedures to non-elective, multiple states have issued additional directives. We will be monitoring and reporting visible changes in procedure patterns/distribution and will provide updates as insight becomes available.

If you have any questions or would like to discuss in more detail, please contact us at insights@dentalmarketiq.com.

ABOUT DENTALMARKETIQ

DentalMarketIQ® is the leading provider of business intelligence and data for dental equipment and merchandise suppliers. Maintaining the most comprehensive dentist location and dental claims database in the country, DentaBase®, DentalMarketIQ provides suppliers with a trusted, single source of truth on nearly all active U.S. dentists to guide suppliers to the highest-potential sales targets and support their future growth strategies. Through data and analytics, engagement and execution support and consulting services, we help dental suppliers acquire new customers, keep and grow existing customers, introduce new products and enter new markets. With these powerful data solutions and a team of dental market and analytics experts to help suppliers better understand their markets, DentalMarketIQ is the authority on dental industry trends, developments and business optimization solutions. DentalMarketIQ is a division of P&R Dental Strategies, LLC, the premier dental insights company.