

# Survey Participants React to Industry Trends and Transitions

Our *State of the Industry 2010 Survey* respondents have a lot to say about the changes our industry is undergoing. Here's a look at what's on their minds:

## Offshore Outsourcing

“ I wouldn't be so bothered by offshore if it did not make me believe that the entire definition of the word “quality” has changed... and not in a good way.

~Suzanna Sauris  
Today's Dental Laboratory  
Naperville, IL

We were 100% against going offshore, but then we started losing clients to outsourcing labs and that forced our hand. It turned out to be the right step for us; the outsourced business complements our domestic business, increased our overall workload 45% and basically saved our lab. With the revenues generated from outsourcing, we've hired another 25 employees in the U.S. and have reinvested capital into purchasing CAD/CAM technology for our domestic lab.

~Don Albensi  
Innovative Dental Arts  
North Huntingdon, PA

I have seen offshore work better than some of the work made in the USA; that makes the competition real. I believe the bigger production labs are the ones that will have to compete with these giants. The small boutique lab is safe from this race because its customers are not looking for price; they're looking for service, close communication and specialized knowledge from the laboratory.

~Juan Escobar, CDT  
Key Element Dental Laboratory  
Chesapeake, VA

I used to outsource to a couple of labs that own big labs in China. There were several problems: unacceptable quality, long turn-arounds, lack of a qualified person to speak to if something wasn't done to my expectations... But my outsourcing to offshore labs came to an abrupt end once and for all when I visited one of my dentist-clients and I saw boxes from my outsourcing lab. Needless to say that the work coming from that office started to dwindle. So the lab that was selling me its services also was soliciting my accounts.

~Dan Perera, CDT, MDT, MDP  
D&L Dental Studio LLC  
Pennel, PA

We were resistant at first, however, we will always participate in any growing trend. Offshore is here to stay and will continue to grow whether we like it or not.

~Warren Rogers  
Knight Dental Group  
Oldsmar, FL

Two weeks ago, I visited the Chinese lab I use and was extremely impressed. We are in a global market environment.

~David Nunnally, CDT  
Derby Dental Lab  
Louisville, KY

The trend of an insurance-driven industry along with a contraction of the economy and the acceptance of the outsource market will lead to a further decrease in the supply of dental prosthetics manufactured in the U.S. The main equalizer may be CAD/CAM technology and Lean Manufacturing.”

~Christopher Verch  
Verch Dental Ceramics  
Ellisville, MO

## Relationships with Dentist-Clients

“I've noticed a change in attitude during the past 10 years. With the new generation of dentists, there's less of a dictatorial relationship and more of a growing respect for experience and skills. Some

openly admit their dependency on my lab for treatment plans, technique training and troubleshooting problem patients. More time is spent providing these services and, although I like the respect, I'm not yet sure how this affects the bottom line.

~Brad White, CDT  
Perdue Dental Lab  
Sarasota, FL

Dentists are a lot more trusting and reliant on us now than they were in the 70s and 80s which is a positive change. We are a team member now, not a dim-witted cousin that gets hidden in the attic when company comes over like it used to be.

~Loren Ford  
Thorn Ford Dental Laboratory  
Bothell, WA >>

## Over 40% of Lab Owners to Retire in Next Decade

Here's the timeframe for survey participants' retirement:

Less than 3 years	5%
3-5 years	14%
6-10 years	24%
11-15 years	21%
16-20 years	18%
Over 20 years	18%

In terms of timing, laboratory owners are no different than many Americans who plan on working longer: nearly 40% say they'll be over 65 when they begin to transition out of their laboratories. Given the hit that many retirement accounts have taken during the financial crisis, this gives them more time to recoup some of their losses and hopefully tuck more into their nest eggs.

SOURCE: LMT Research Dept. ©2010



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## Respondents' Total Gross Sales for 2009 by Lab Size

	NUMBER OF EMPLOYEES						
	1	2	3-5	6-10	11-20	21-50	Over 50
Over \$5M					5%	18%	69%
\$3M-\$5M						18%	25%
\$1M-\$3M				10%	69%	64%	6%
\$501K-\$1M			9%	62%	26%		
\$201K-\$500K	8%	31%	62%	28%			
\$151K-\$200K	16%	20%	13%				
\$101K-\$150K	10%	18%	8%				
\$50-\$100K	35%	24%	4%				
Under \$50K	31%	7%	4%				

SOURCE: LMT Research Dept. ©2010

## Respondents' Total Personal Gross Income for 2009 by Lab Size

	NUMBER OF EMPLOYEES				
	1	2	3-5	6-20	More than 20
Over \$151K	6%		4%	33%	74%
\$101K-\$150K	10%	9%	10%	29%	10%
\$81K-\$100K	8%	12%	30%	12%	5%
\$61K-\$80K	10%	26%	18%	14%	3%
\$41K-\$60K	26%	26%	20%	4%	8%
\$25K-\$40K	14%	18%	10%	4%	
Under \$25K	26%	9%	8%	4%	

SOURCE: LMT Research Dept. ©2010

>> It seems younger dentist don't want to establish a lasting working relationship with us; they think of crowns as a commodity to be had for the least amount of dollars. The older dentists have more respect for what we do, communicate better and don't mind paying for our service.

~Scott Graule,  
Anchor Dental Lab  
Charleston, SC

New grads recognize their education is incomplete. Many have no idea how porcelain is applied or fired, their shade taking is limited and they depend on the lab to match or harmonize the restoration to the existing teeth. We're often able to think outside of the box and provide solutions to prepping a case that they haven't considered. We're necessary to these dentists for our skills as well as our imagination.

~Madelin Wypasek  
Ceramic Arts, Inc.  
South Pasadena, FL

In light of the increase in computer-based communication and the benefits it provides, I feel it is more important than ever to not lose sight of the long-term relationship-building quality that live verbal communication provides. It adds an identity to the people on each end of the relationship, rather than just being computer-transmitted information."

~Bill Mrazek, BS, CDT  
Mrazek Prosthodontics  
Naperville, IL

## Regulation

"The biggest change coming is the realization that labs are manufacturing organizations and third-party certification of adherence to quality standards will be more important to demonstrate competence. The labs that can prove their manufacturing process meets quality management standards will be desired by dentists."

~Patrick Tessier  
Modern Dental Laboratory USA  
Bellevue, WA

## A Better-Informed Dental Consumer

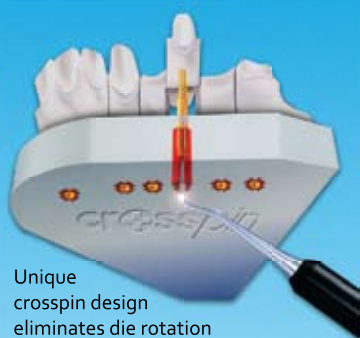
"We need to educate patients so they become better advocates for their own care and make choices for themselves instead of leaving it to the dentist."

~Jeff Yeider, CDT  
Nodecay Dental Lab  
Truckee, CA



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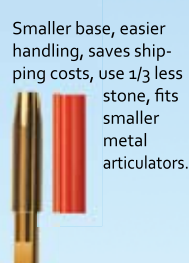
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