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Prepared For:

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Marketing Analysis

Site Location:

[REDACTED]

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This is a summary report and its conclusions should not to be taken as a professional recommendation for future practice site location. The client is solely responsible for using the information provided for informing their decision in a systematic manner, including seeking the advice of other competent legal, real-estate and accountant professionals.

Section 1: Location

Fig 1.1 Map of the location

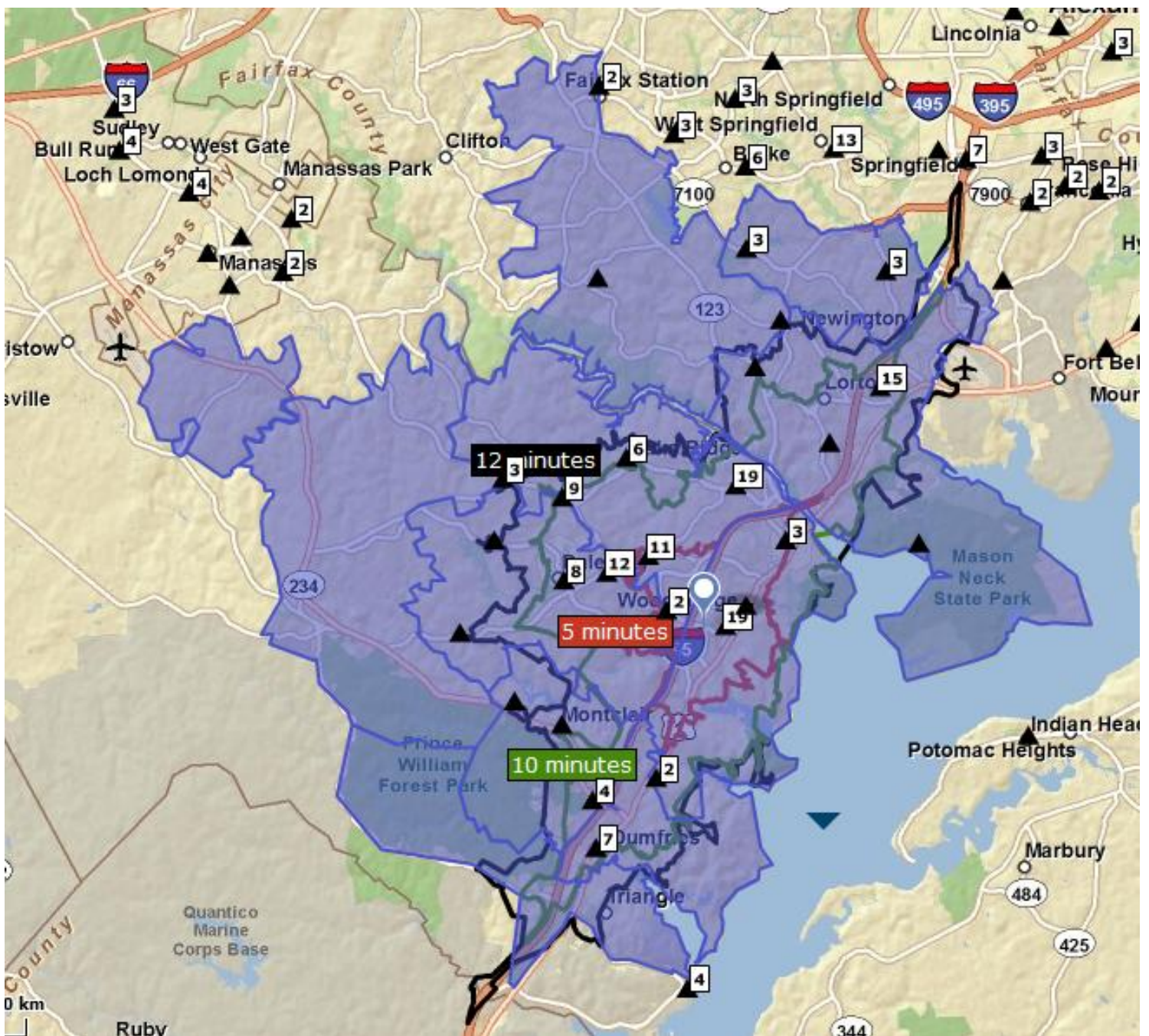


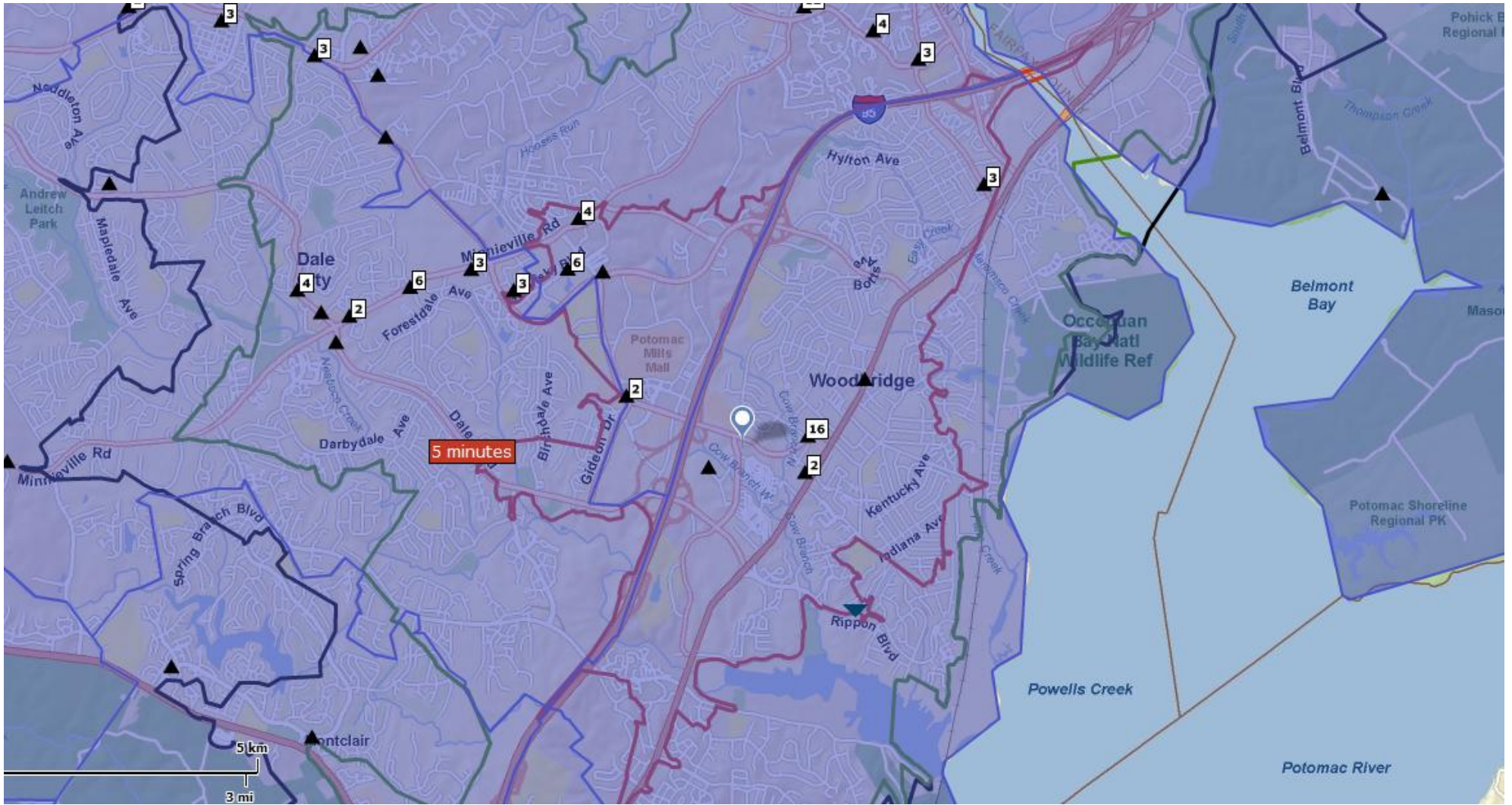
Section 2: Competition and Production Analysis

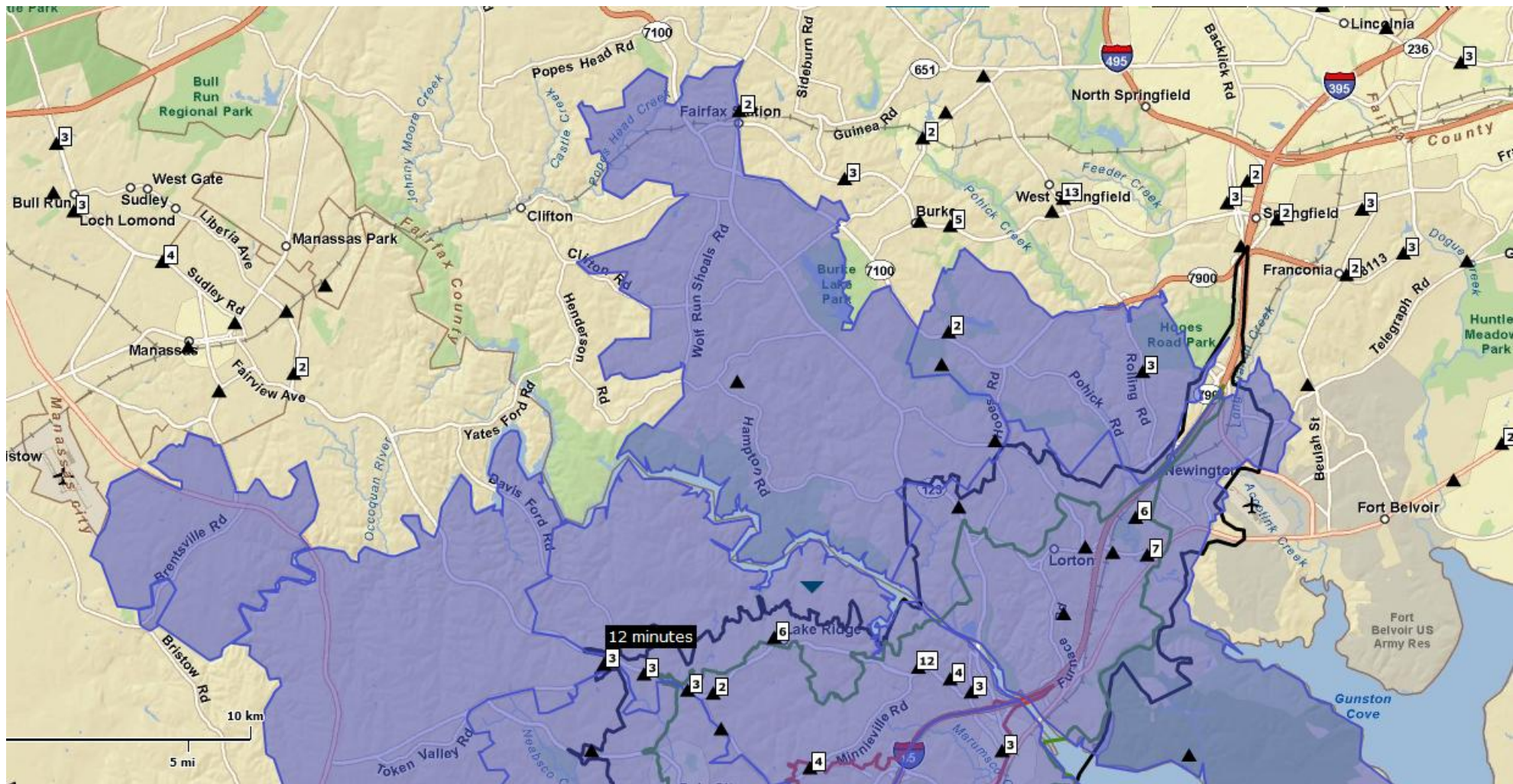
This section evaluates and maps the practice's competition and its effects on the productivity of the practice. While the dentist to population ratio is a good starting point to evaluate the saturation of the area, the adjusted ratio takes into account the dental spending patterns of the population. The adjusted ratio can be higher or lower than the basic ratio, depending on whether the population of the zip code spends more or less than average on dental services.

Fig 2.1 Map of the competition

▲ = GP at this location [2] = Multiple GPs at this location







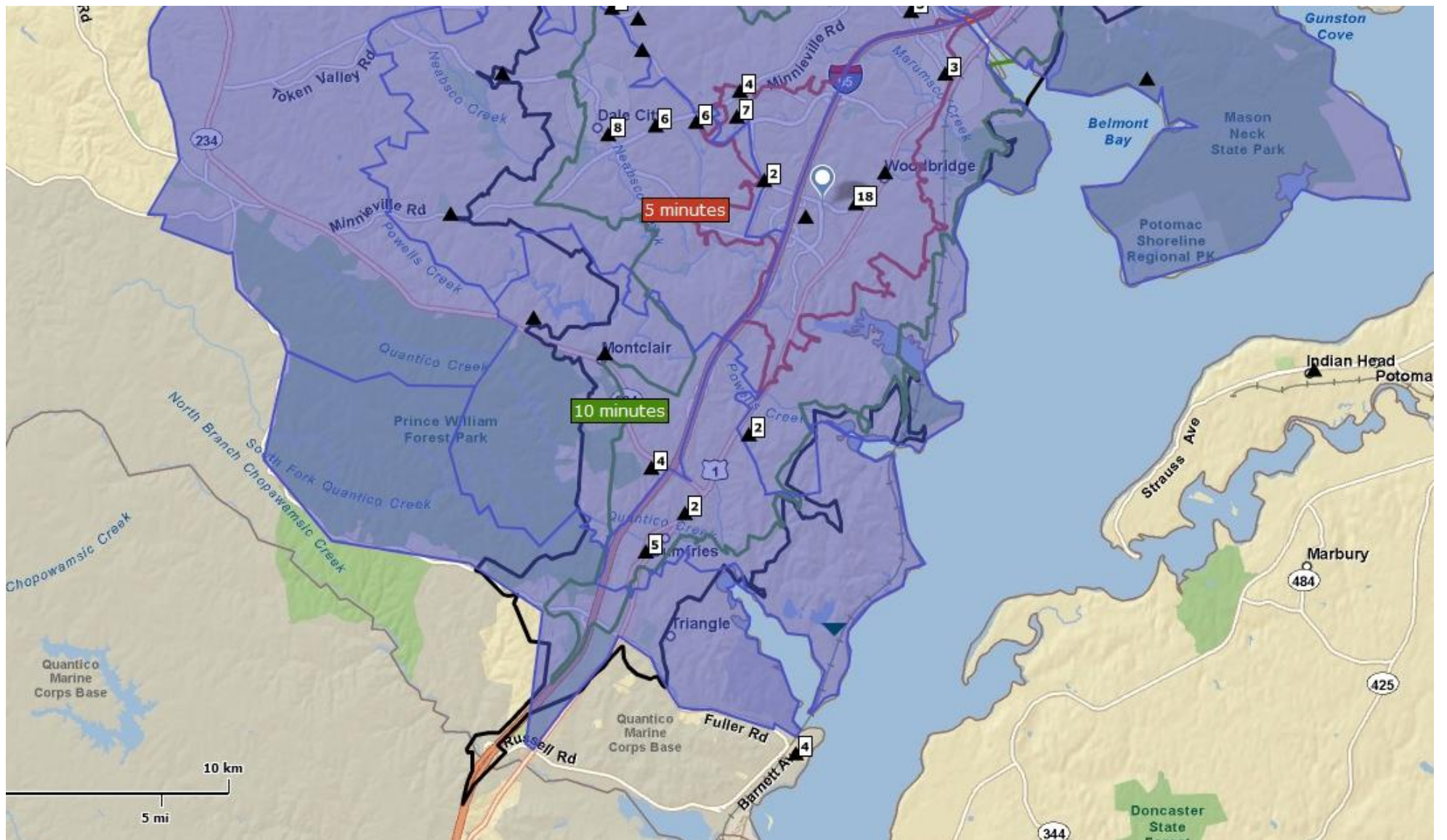


Table 2.3 Production Analysis, 2010

	5 min	10 min	12 min
Total Spending on All Dental	\$7,411,095	\$37,722,764	\$55,695,425
Total Spending on GP \$	\$5,410,478	\$27,539,543	\$40,660,502
# of GPs	38	114	127
Population	31,327	133,310	189,908
GP : Pop Ratio	824	1,169	1,495
Yearly average production	\$142,381	\$241,575	\$320,161

Table 2.4 Production Analysis, 2015 Projected (in 2010 dollars)

	5 min	10 min	12 min
Total Spending on All Dental	\$7,951,189	\$39,914,369	\$58,980,115
Total Spending on GP \$	\$5,804,774	\$29,139,526	\$43,058,493
# of GPs	38	114	127
Population	33,610	141,055	201,108
GP : Pop Ratio	884	1,237	1,584
Yearly average production	\$152,757	\$255,610	\$339,043

Fig 2.5 Adjusted Dentist to Population Ratio

The ratio of dentists to population is a useful guide to the relative saturation of each zip code. More saturated zip codes present an area that is harder to break into. The Adjusted ratio takes into account the dental spending patterns of the population. The adjusted ratio can be higher or lower than the basic ratio, depending on whether the population of the zip code spends more or less than average. This is important to consider because a zip code can be more saturated, but if its population spends a lot of money on dentistry, it can be a good option. On the other hand, if a zip code has very few dentists but people rarely go the dentist there, it could present a subpar opportunity. In this way that zip codes can be compared to each other directly.

	GP/Pop Ratio	Adjusted Ratio	GP / Pop Ratio	Adjusted Ratio
5 min	824	707	884	759
10 min	1,169	1,200	1,237	1,269
12 m in	1,495	1,590	1,584	1,683

Fig 2.6 Dentist to Population Ratio, 2010

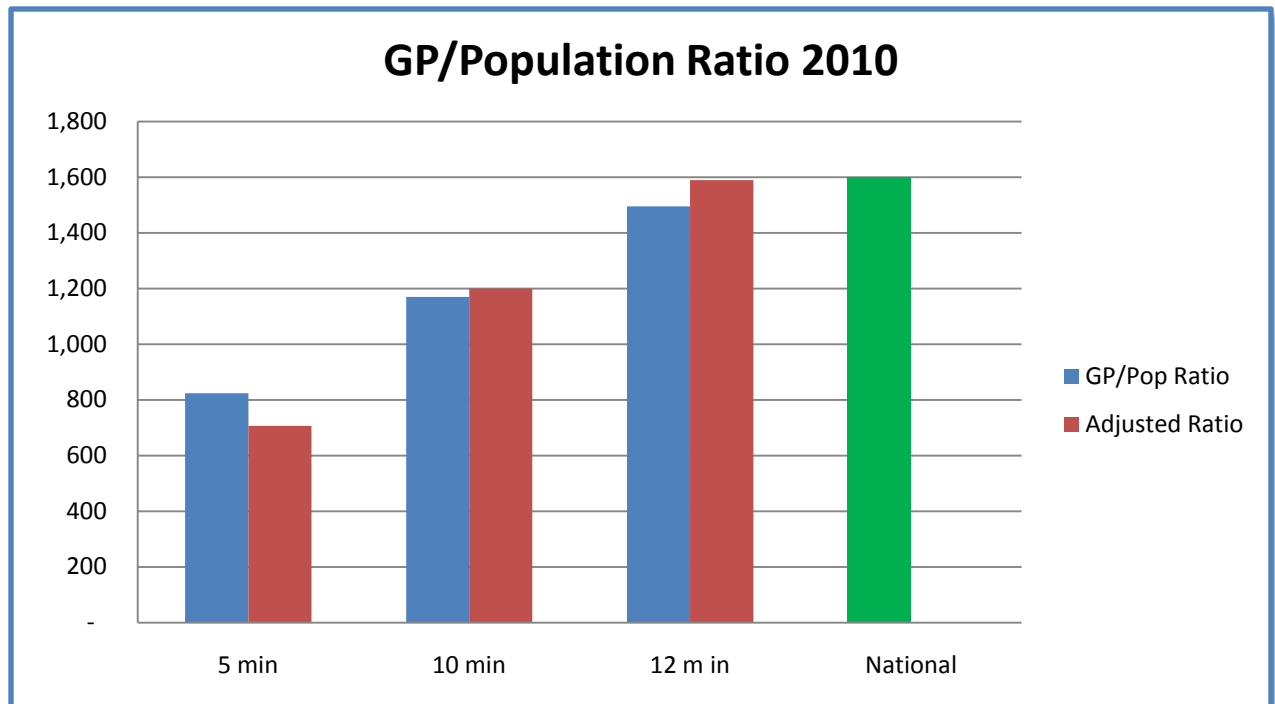
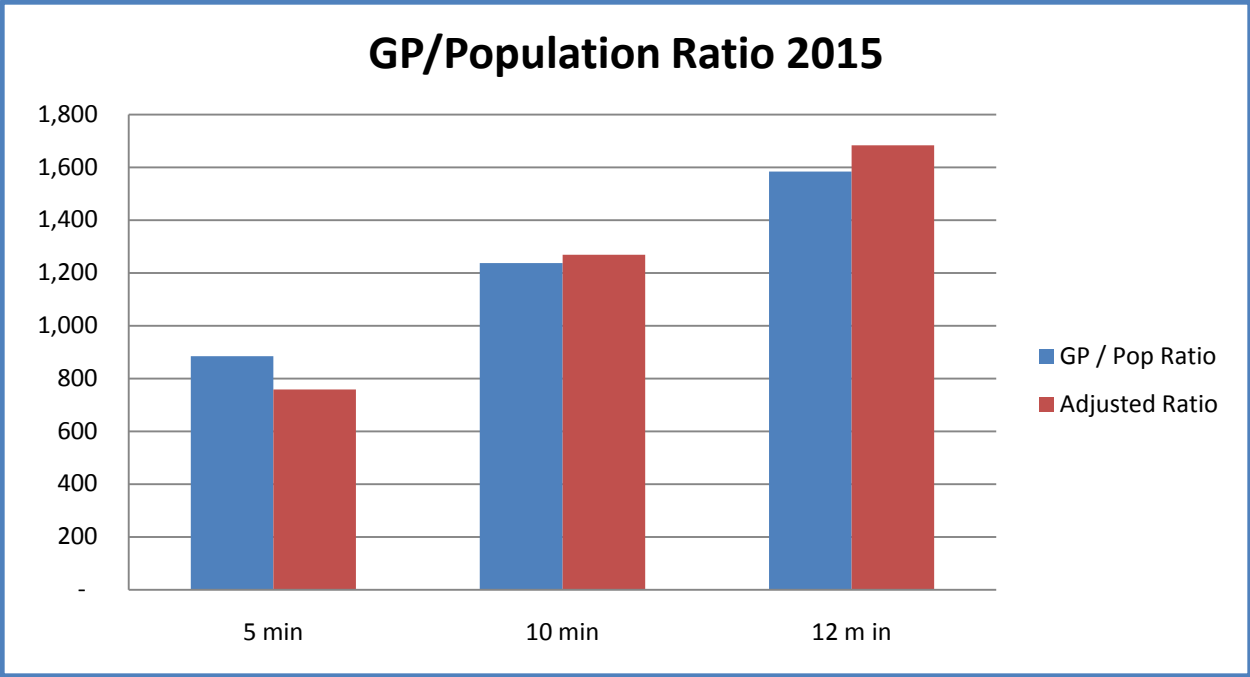


Fig 2.7 Dentist to Population Ratio, 2015 projected



Competitive Advantages

The practice competes in an area where the total market demand for dentistry is quite high, with over \$55 million spend on dentistry in 2010, of which over \$40 is spent on general dentistry. Because the market is so large, there is a great opportunity to attract both patients who just moved to the area, but also patients who already have a dentist but may be persuaded to switch based on the unique characteristics of the practice. It will be key to evaluate the practices in the area to see what they don't offer, so that a unique brand with a unique service offering can be established for the practice.

One particular advantage of the practice is that it is located very strategically, right next to I-95 and Opitz Blvd, which is a major East-West artery in the Dale-City/Woodbridge area. It actually is the primary road that leads to Potomac Mills mall, and while the mall is on the other side of I-95, traffic on Opitz Blvd inevitably increases due to mall traffic, making it more likely that the practice becomes visible and accessible to those people. Finally, the practice is located in a recent development, which includes the Ann Ludwig School, other commercial and significant residential properties. This suggests that there is a large influx of people, businesses and dental spending to the immediate area, and the practice is well positioned to take advantage of it.

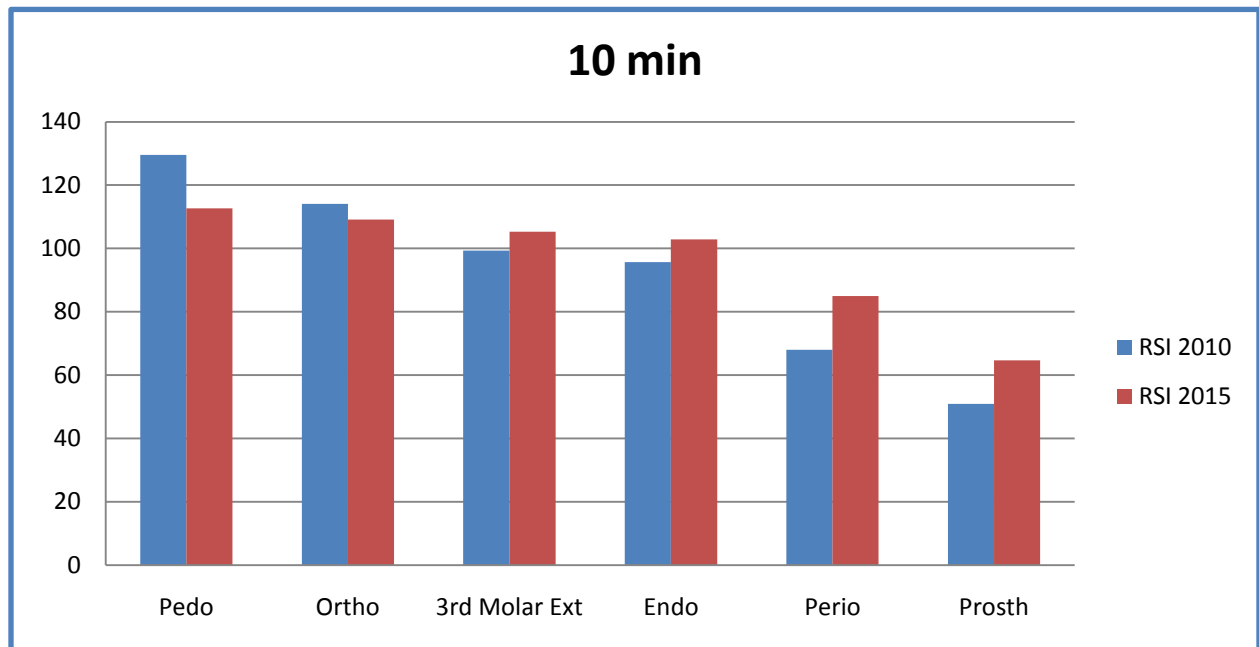
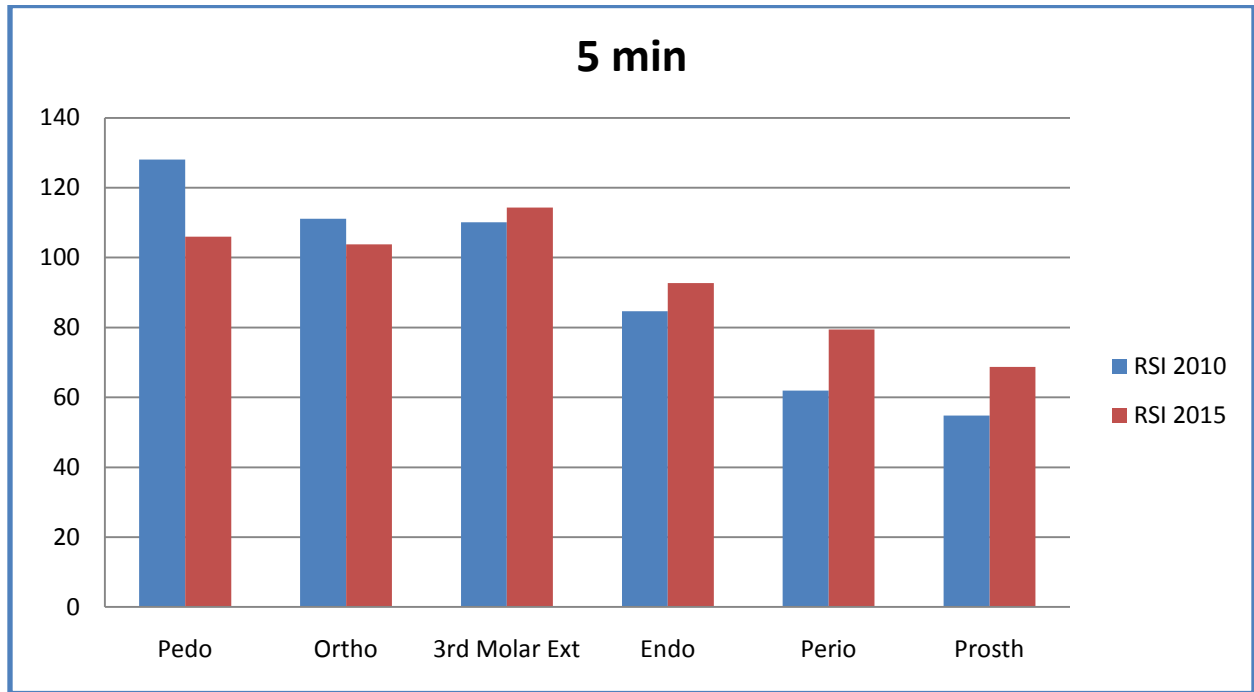
Competitive Challenges

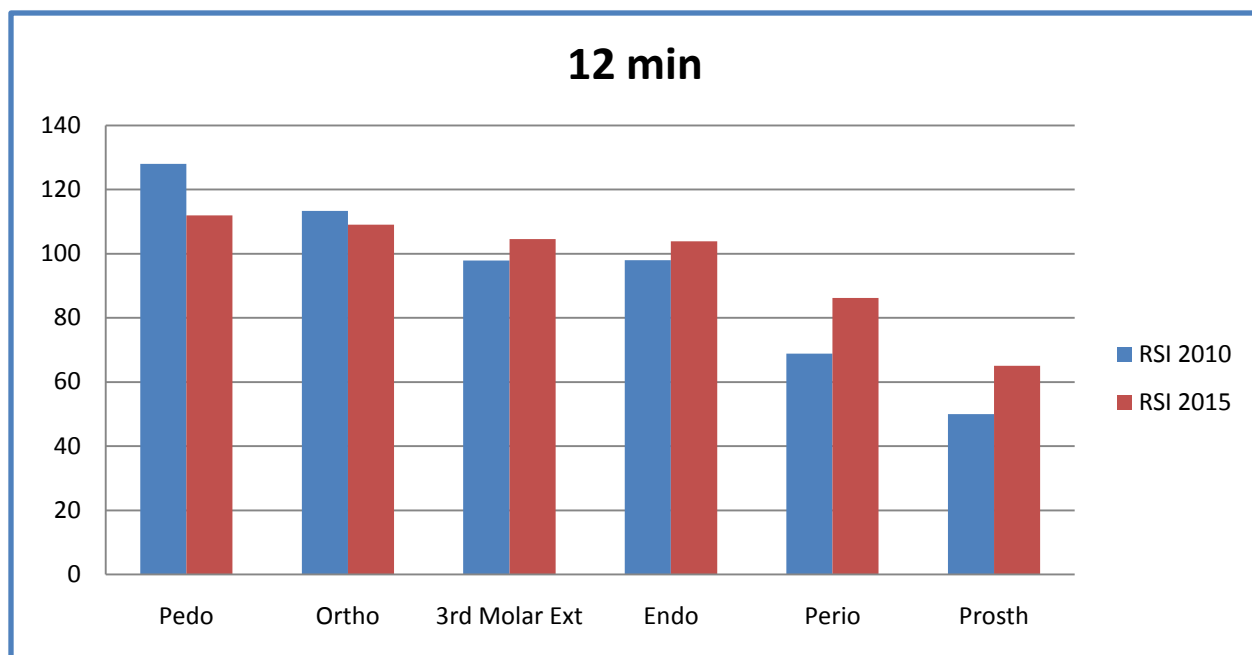
Despite the large size of the market and a large population of potential patients, the area is quite competitive and has many providers. For example, Neibauer, a dental chain that caters primarily to the typical private practice patient, is open right next door, providing a formidable and organized competition. Overall, the immediate area is quite saturated, with a ratio of about 1 GP for every 800 people. Once a larger area of 12 minutes is evaluated, the ratio becomes a typical 1 to 1500, suggesting that this is an area of average competitiveness compared. In fact, when the largest area is considered, even with the population growth predicted through 2015, the estimated average production per dentist is about \$400,000, which is lower than the U.S. average. In order for the practice to rise significantly above this baseline, it will need to exploit all of the marketing advantages it can to increase its marketability and patient flow.

A second challenge is that many of the practices in the area are quite new, which generally means they tend to be modern, technologically advanced and with good business systems compared to the old practices. These new practices are more difficult to compete against. In addition, the growth in new practices is expected to continue, suggesting that more competition is coming.

Section 3: Dental Service Demand

Fig 3.1 Demand for dental services compared to national average
100 = National Average





Dental Demand Analysis

In this area, there are clearly a large proportion of children, which indicates a young population which is more likely to demand pedo, ortho and 3rd molar extractions. This means that in order to rapidly build a patient base, the practice should offer many of these services geared towards children and young adults. Basic pediatric dentistry needs to be provided so that the majority of children can be treated in the practice and not referred. Third molar extractions would also be useful, because in this type of area, where other demographics point to a decreased prevalence of childhood cavities, third molar extractions are one particular service that will still have high demand.

Compared to national average, there is half the demand in services that are typically important for older patients, such as comprehensive prosthodontics and perio. As the population ages over time, there will be an increase in demand for these services, so while they currently represent a small demand, they should not be completely ignored because being able to offer these services will position the practice to be more competitive over time.

Finally, the overall skew of the population age towards younger patients suggests that there will be good demand for basic preventative dentistry, thus adequate hygiene capacity will need to be available. In addition, younger patients who don't need a lot of work are typically more likely to switch dentists, so once again marketing the practice in a unique manner will be important.

Fig 4.2 Zip Code Demographics, 2010-2015

Zip Code	2010 Population	2010 HH Income	2015 Population	2015 HH Income
20112	22,512	\$112,915	23,714	\$118,568
22025	18,536	\$101,104	20,327	\$106,752
22026	15,069	\$70,861	16,660	\$81,941
22039	18,936	\$176,665	19,191	\$201,757
22153	31,323	\$115,615	31,453	\$129,127
22172	8,075	\$50,568	8,653	\$65,587
22191	54,354	\$67,177	59,164	\$78,102
22192	55,938	\$91,169	56,429	\$102,846
22079	26,911	\$94,122	29,143	\$109,904
22193	72,425	\$85,924	75,179	\$98,425

Fig 4.3 Population Growth 2010-2015

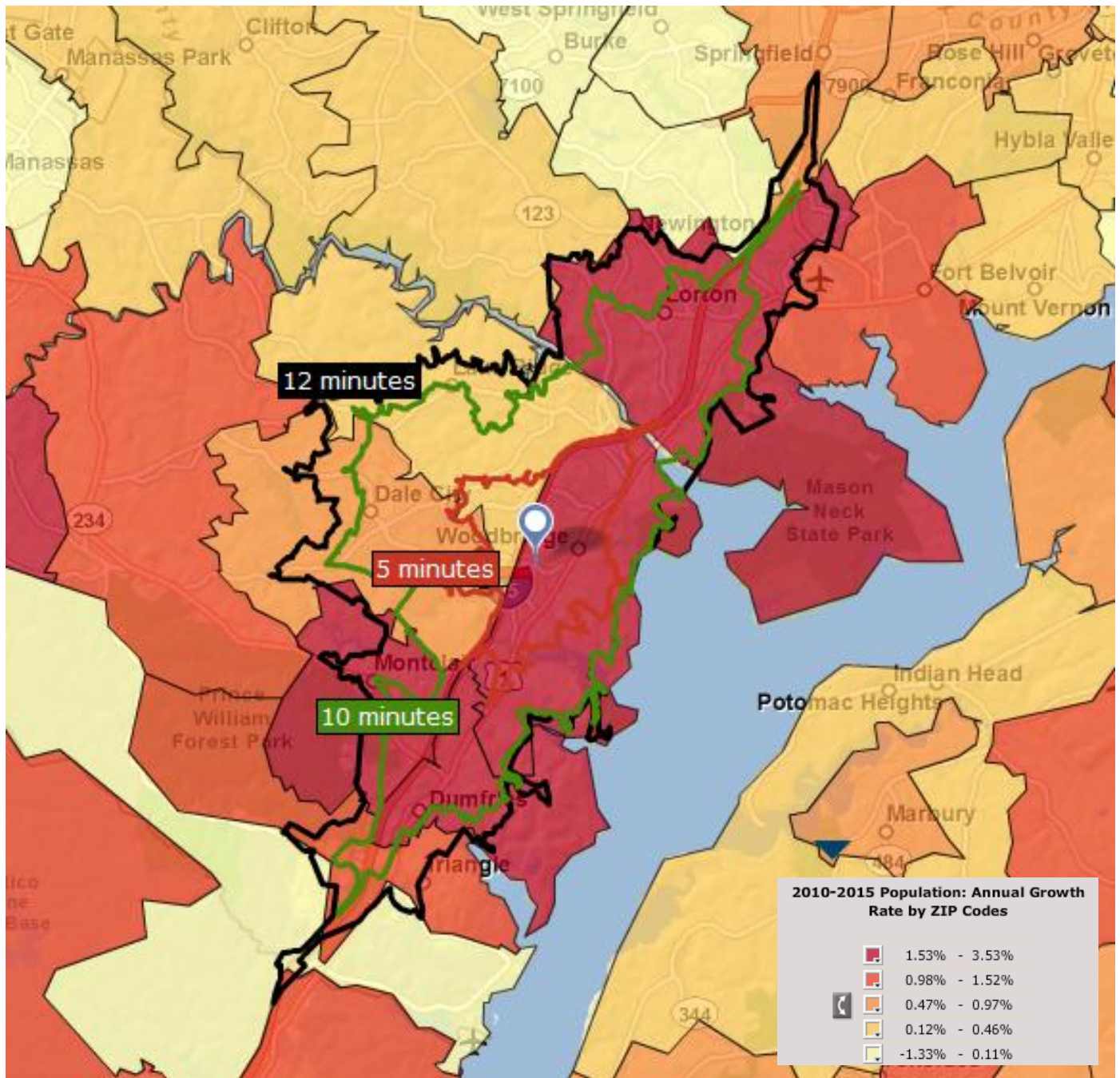
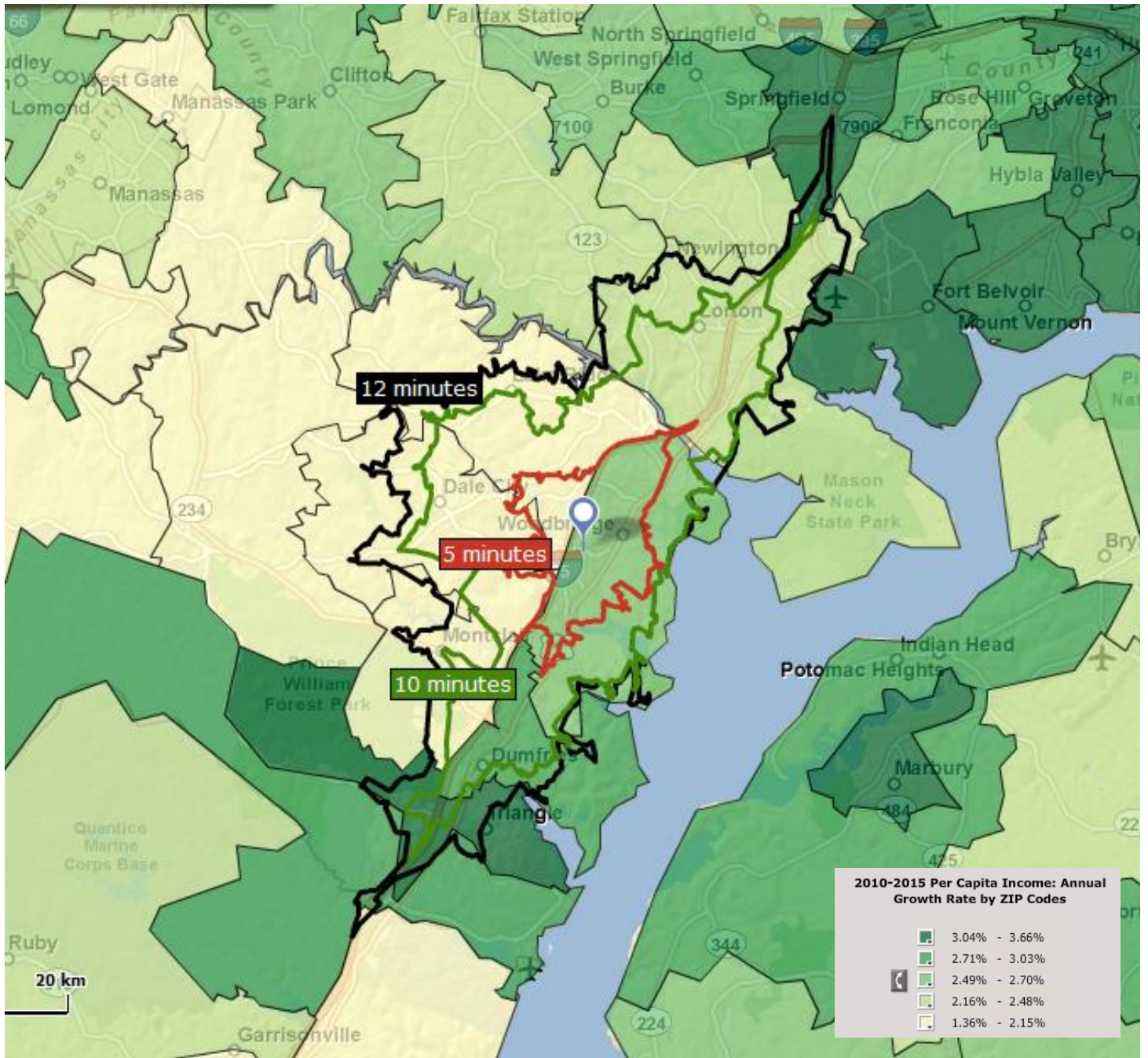


Fig 4.4 Income Growth 2010-2015



Section 5: Creditworthiness Assessment

Fig 5.1 Homeownership

Homeownership is a good indicator of creditworthiness, since those that own homes tend to have a much higher credit score, and have assets that against which they can take out credit. While patients are not likely to use up their entire checking and savings on dental services, higher balances mean that patients are likely to afford the needed care.

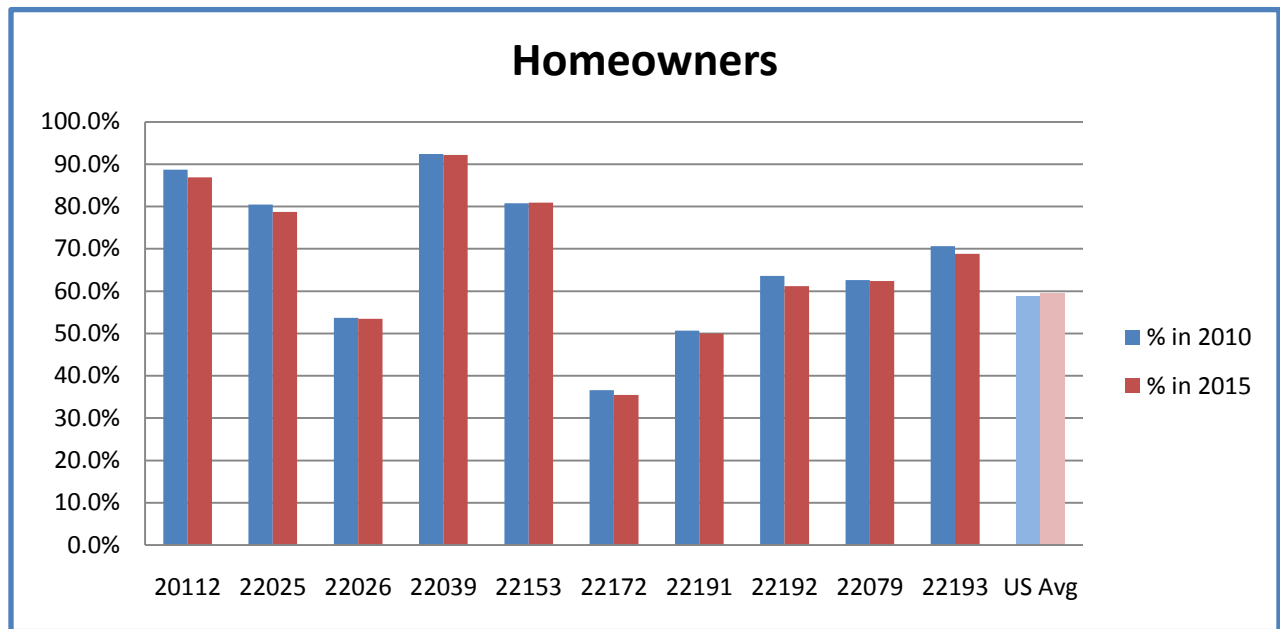
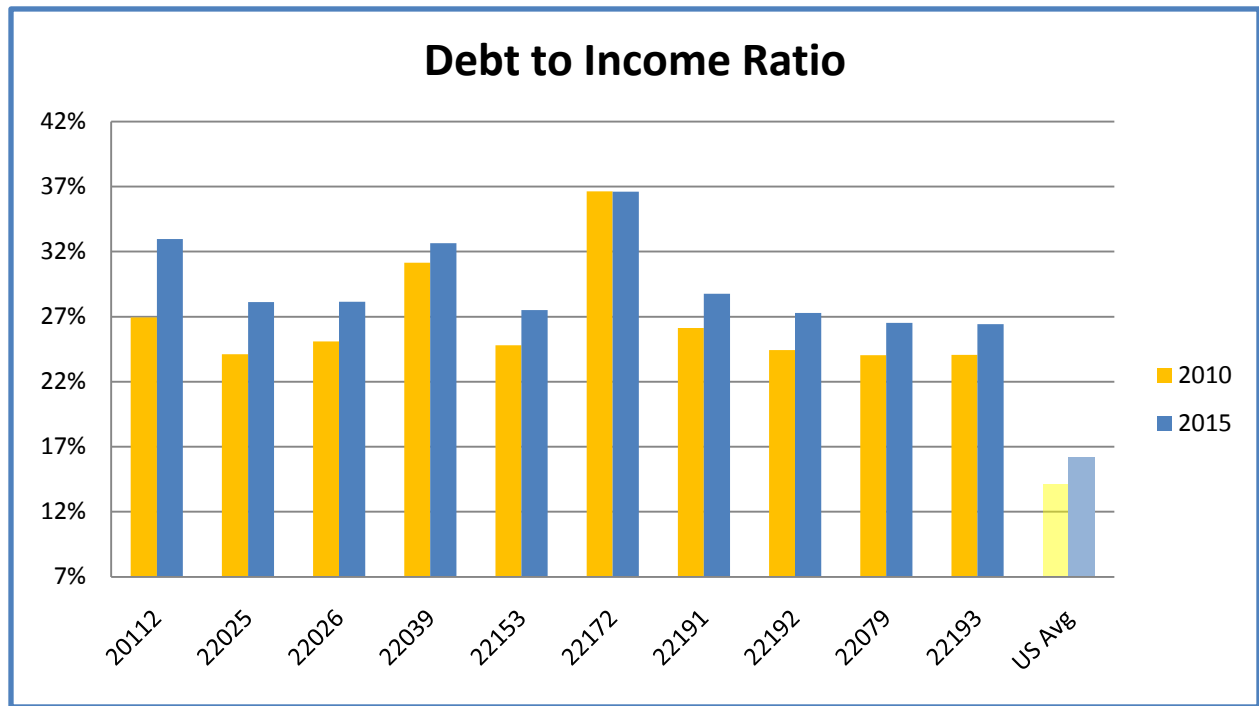


Fig 5.2 Debt to Income Ratio of New Residents, 2010

The debt to income ratio is a metric used very often by third party financing companies for credit approvals. It relates the person's gross income to the debt payments they have to make each month which include mortgage/rent plus other revolving debts (such as car loan/lease) to income. Typically, lenders look for no more than 36% DTI. The closer the average numbers in a zip code are to this, the less likely they are to be approved. A dental practice feeds significantly off new residents in an area, who are buying houses and incurring mortgages at the median house prices. Therefore, this debt to income ratio is especially relevant to the ability of a dental practice to provide third party financing to new patients and to generally measure their ability to afford dental care.



Section 6: Employment Situation

Table 6.1 Unemployment, 2010

This section provides information on the employment of people living in the zip codes. Patients in the white collar industries are more likely to have more complete dental coverage. Blue collar employees sometimes do have good dental benefits from union agreements, but this is becoming less prevalent. Employment information is only for those 16+ years old.

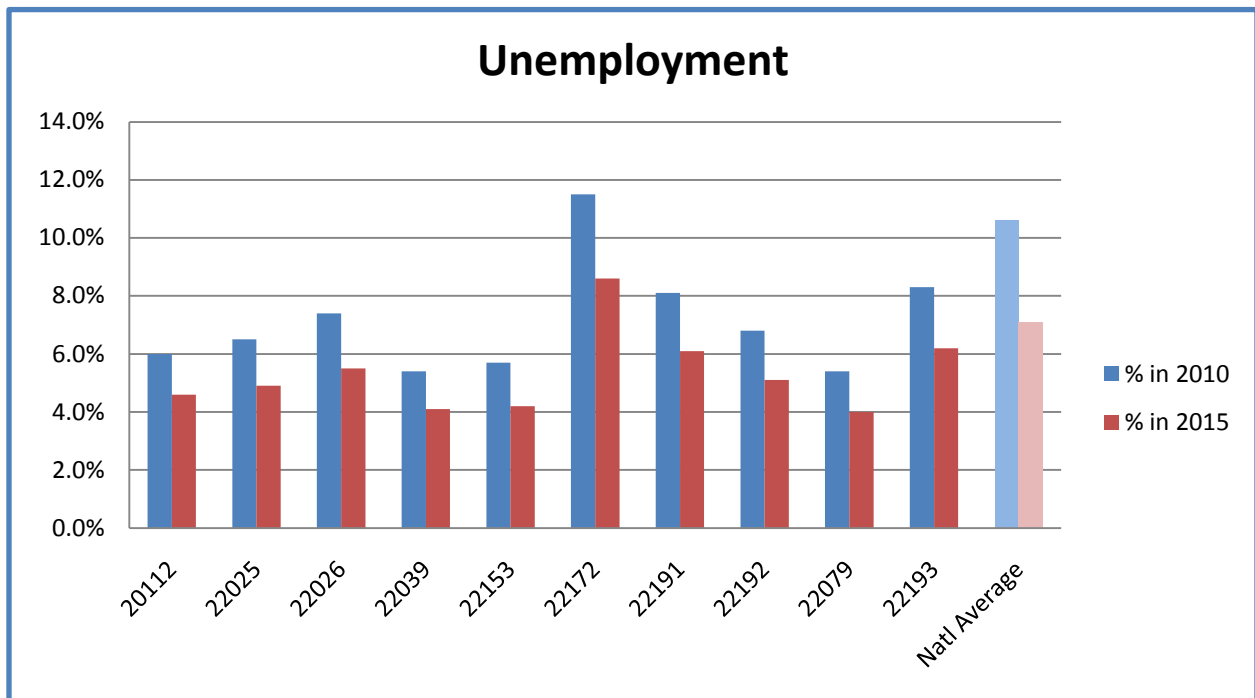


Table 6.2 Employment by type, 2010

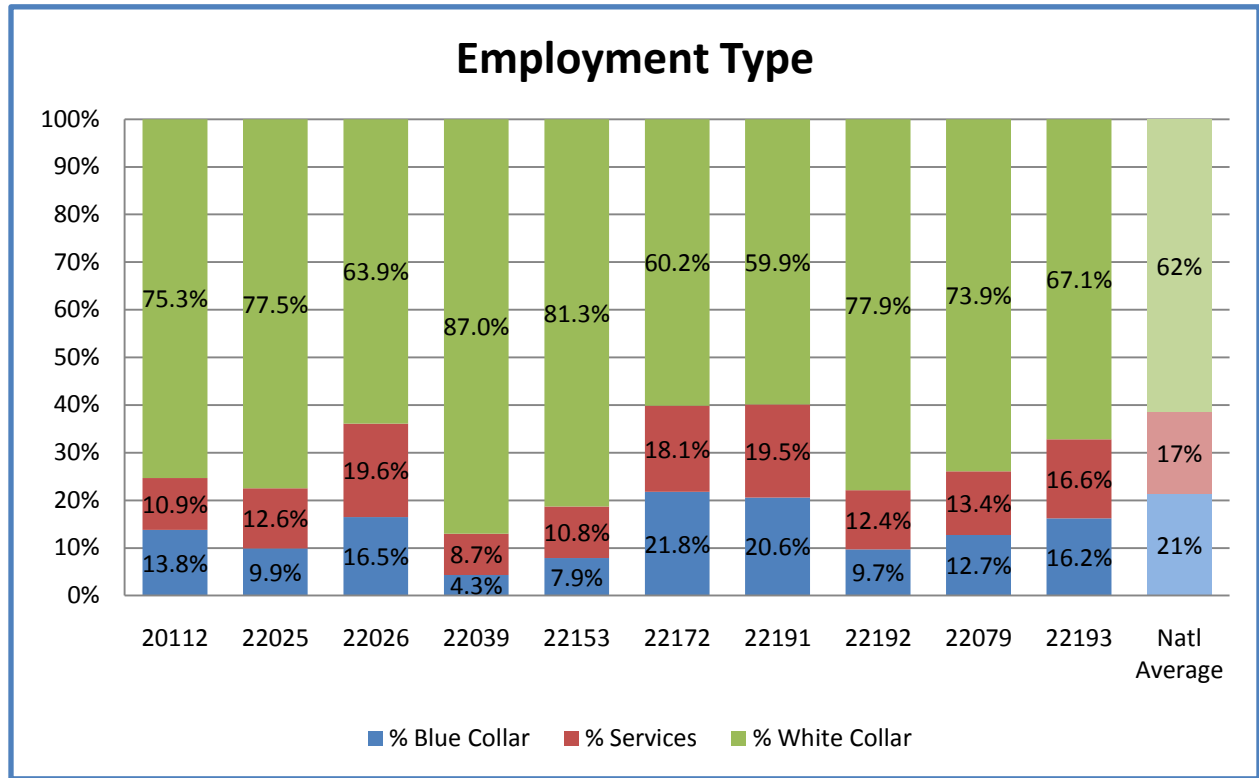


Table 6.3 Daytime Population, 2010

It is important to make the distinction between the daytime and the nighttime (resident) population of a zip code. The resident population is the one that most demographics focus on. However, certain zip codes have a large change during the day. For example, a zip code that has a much lower daytime population than resident population is a “bedroom community”. This would suggest that during the day, many of the people who are more wealthy and educated are outside of the area. This could affect new patient numbers. On the other hand, if the daytime population is much higher than resident population, this suggests that the zip code is a large commercial and employment center. This in turn is very favorable because it means that there is a large pool of potential patients that come to work in this zip code every day. To illustrate the effect this has on the a potential practice, is it useful to compare the Resident Population to DDS ratio (which is the standard ratio) to the Daytime Population to DDS ratio (which will be higher if this is an employment center and lower if it’s a “bedroom community”). The Daytime Population to DDS ratio thus provides a more accurate perspective of the saturation of dentists, which accounts for the inflow or outflow of workers during the day in a particular zip code. The Daytime ratio is the explanation for why there are often hundreds of dentists in a zip code of a city center, or why there are very few dentists in a remote suburban zip code.

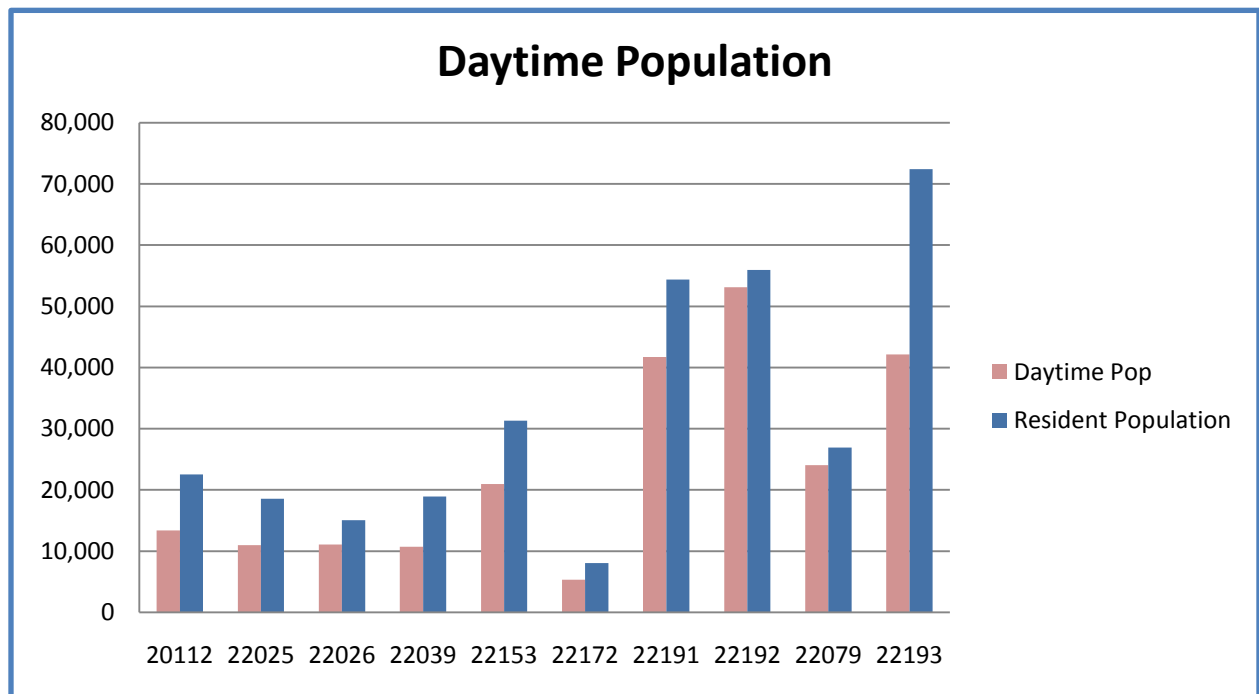


Fig 6.4 Daytime vs. Resident Population to DDS Ratio, 2010

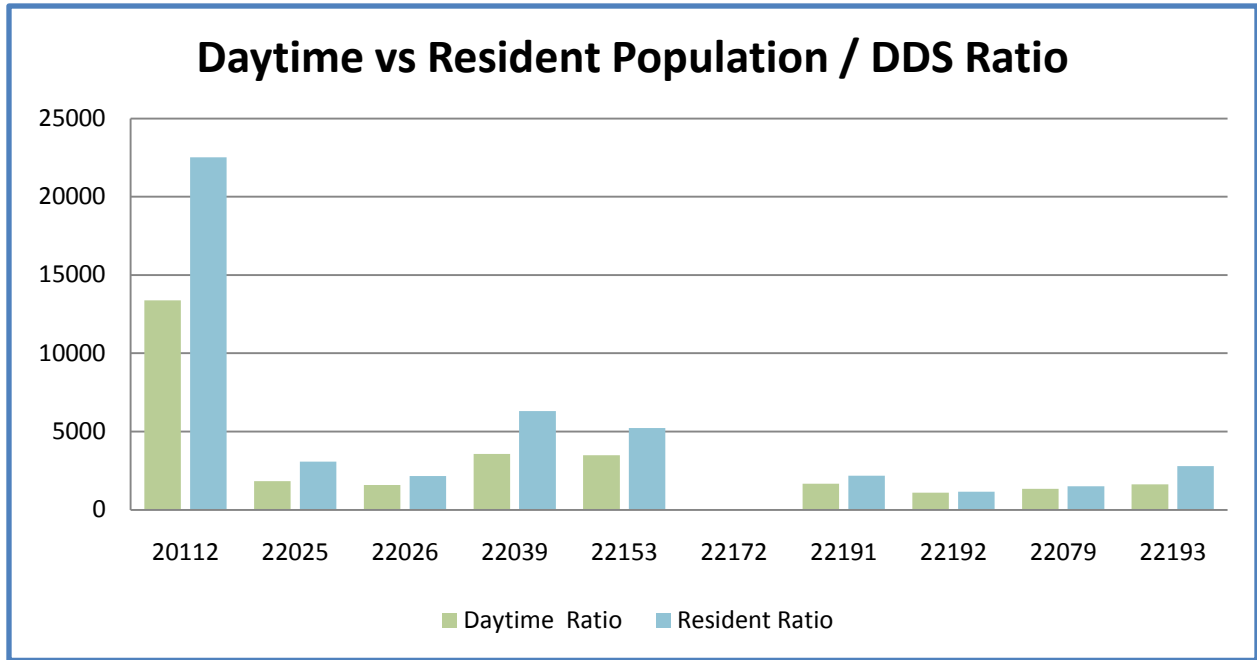


Table 6.5 : Largest Employers

Business Name	Address	City	Zip	Carrier Route	Phone Number	Type of Business	Employee Size	Approximate Sales Volume
Metro Healthcare Systems Inc	13109 Rock Ridge Ln	Woodbridge	22191	C010	7033622725	HEALTH SERVICES	250 - 499	\$20 to \$50 million
Home Depot Installation Svc	1041 Cannons Ct	Woodbridge	22191	C007	7034974440	LIGHTNING ROD INSTALLATION	250 - 499	\$20 to \$50 million
Occoquan Woodbridge Lorton	1306 F St	Woodbridge	22191	C010	7034915173	FIRE DEPARTMENTS	250 - 499	
Wal-Mart	17041 Jefferson Davis Hwy	Dumfries	22026	R018	7032214116	DEPARTMENT STORES	250 - 499	\$20 to \$50 million
Westminster At Lake Ridge	12185 Clipper Dr	Woodbridge	22192	C031	7034963400	RETIREMENT COMMUNITIES & HOMES	250 - 499	\$10 to \$20 million
Westminster-Lake Ridge Rtrmnt	12191 Clipper Dr	Woodbridge	22192	C031	7036430551	NONCLASSIFIED ESTABLISHMENTS	250 - 499	
Secure Corp	1529 Old Bridge Rd # 2	Woodbridge	22192	C020	7034999359	SECURITY GUARD & PATROL SERVICE	1000 - 4999	\$100 to \$500 million
Woodbridge High School	3001 Old Bridge Rd	Woodbridge	22192	C015	7034978000	SCHOOLS	250 - 499	
Potomac Hospital	2300 Opitz Blvd	Woodbridge	22191	C077	7036701313	HOSPITALS	1000 - 4999	\$100 to \$500 million
Stc Management Llc	13300 Minnieville Rd	Woodbridge	22192	R002	7034911108	AUTOMOBILE LUBRICATION SERVICE	250 - 499	\$20 to \$50 million
Wal-Mart	14000 Worth Ave	Woodbridge	22192	C010	7034972590	DEPARTMENT STORES	250 - 499	\$50 to \$100 million
Home Depot	14025 Foulger Sq	Woodbridge	22192	C010	7036703699	HOME CENTERS	250 - 499	\$50 to \$100 million
IKEA	2901 Potomac Mills Cir	Woodbridge	22192	C016	7034944532	FURNITURE-DEALERS-RETAIL	250 - 499	\$50 to \$100 million
Gar-Field High School	14000 Smoketown Rd	Woodbridge	22192	C029	7037307000	SCHOOLS	500 - 999	
Prince William Brd-Superviors	1 County Complex Ct	Woodbridge	22192	R008	7037924640	GOVERNMENT OFFICES-COUNTY	1000 - 4999	
South County Secondary School	8501 Silverbrook Rd	Lorton	22079	R019	7034461600	SCHOOLS	250 - 499	
Prince William County Public	14800 Joplin Rd	Manassas	20112	R021	7037917200	SCHOOLS	250 - 499	

Analysis of Creditworthiness and Employment Situation

Overall, this area should be excellent for third party financing. In the current economy, discretionary spending is limited and people are much more watchful of their spending, even on necessary services like dentistry. In addition, insurance limitations tend to influence patients choices heavily, even in areas that are fairly well off economically. In the area surrounding the practice, the economic indicators for third party financing approval are, for the most part, very good. Unemployment is lower than average and is declining. As in most of the DC area, the influx of government jobs and spending has allowed the vast majority of workers to keep their jobs. Homeownership is quite high in the zip codes surrounding Woodbridge and Dale City. There are a few red flags, however. First, the debt to income ratios are very high. With real estate prices still very high and not having experienced as large a correction as in other parts of the country, the housing market is a big financial burden on new families. With median prices still so high, new residents will find it difficult to afford expensive treatment while paying their cost of living expenses. While almost everyone in this area will be approved for Care Credit or other financing, the total amount that they qualify for can be limited by these high debt to income ratios. In addition, the area around the practice and other parts of Woodbridge also has a very high percent of renters. These families have high cost of living and no equity, negatively impacting their creditworthiness, so they are also likely to be approved for smaller dental financing amounts. Finally, this type of scenario often points to a situation where people appear to be well off, but are actually struggling. They are thus much more likely to not pay their dental bills or complain when collections are started. While it may be difficult for a new practice, it would be very advisable to make strong financial arrangements and collect for most, if not all treatment upfront.

In this area, we see that a large part of the population commutes out, as is typical with most suburbs of DC. In each zip code, the population drops by about 10,000 during the day. Since there are a limited number of large employers in the area, it would appear that most of the people with the better paying, more stable jobs are indeed commuting outside of the area. Therefore, to be competitive in this area, we believe that extended hours, which include early morning, evening, Friday and Saturday hours would be beneficial to build up a patient base quickly. While these extended hours alone are typically enough to differentiate a practice from local competition, it appears that the current existing competition is already offering this. Therefore, we would argue that extended hours will be almost a must just to be even with the competition, and additional unique aspects will be necessary to further differentiate and promote the practice.

Looking at the largest employers in the region, we find there are several public sector employers, such as the county government and schools. Typically, employees of these entities have some good basic PPO dental coverage. However, the plans purchased are typically the middle or bottom tier plans, with limitations and fee schedules below average. However, we have found that even though these are not the best insurances to participate with, the ability to get a significant amount of patients from government and schools can be a very positive influence on the practice, by spreading word of mouth marketing throughout the community, as teachers and local government employees typically are well connected and can be influential in the community.

Section 7: Marketing Info

Table 7.1: Use of Yellow Pages and internet, 2010

Zip	Used YP online	Used YP in print	Searched YP for dentist	Used Internet for medical/dental info in last 30 days
20112	26.5%	55.8%	6.9%	23.9%
22025	24.8%	56.8%	7.9%	21.0%
22026	21.1%	54.1%	8.0%	20.0%
22039	24.3%	55.6%	6.4%	26.1%
22153	26.8%	56.9%	7.5%	21.7%
22172	19.8%	54.9%	7.8%	16.8%
22191	20.5%	55.0%	8.2%	17.8%
22192	24.1%	56.0%	8.2%	19.9%
22079	22.6%	54.1%	8.1%	18.9%
22193	23.0%	56.0%	8.7%	19.5%
<i>Average</i>	23.3%	55.5%	7.8%	20.5%
US Avg	16.8%	53.1%	7.9%	15.2%

Table 7.2 : Use of dental products, 2010

Zip	Used floss in 6 months	Used canker sore remedy/toothache	Used denture fixative	Used whitening toothpaste
20112	76.0%	14.7%	2.5%	41.9%
22025	72.4%	15.6%	3.1%	41.6%
22026	69.2%	16.8%	3.5%	42.2%
22039	78.1%	14.2%	2.3%	41.6%
22153	74.1%	15.3%	3.0%	41.0%
22172	62.9%	17.5%	6.3%	38.6%
22191	66.3%	18.0%	4.9%	39.2%
22192	71.0%	15.8%	3.1%	41.5%
22079	69.5%	15.6%	3.3%	40.2%
22193	69.6%	17.0%	3.6%	41.8%
<i>Area Average</i>	<i>70.9%</i>	<i>16.0%</i>	<i>3.5%</i>	<i>41.0%</i>
US Avg	62.3%	17.5%	6.2%	37.0%

Fig 7.3: Visited dentist in last 12 months, 2010

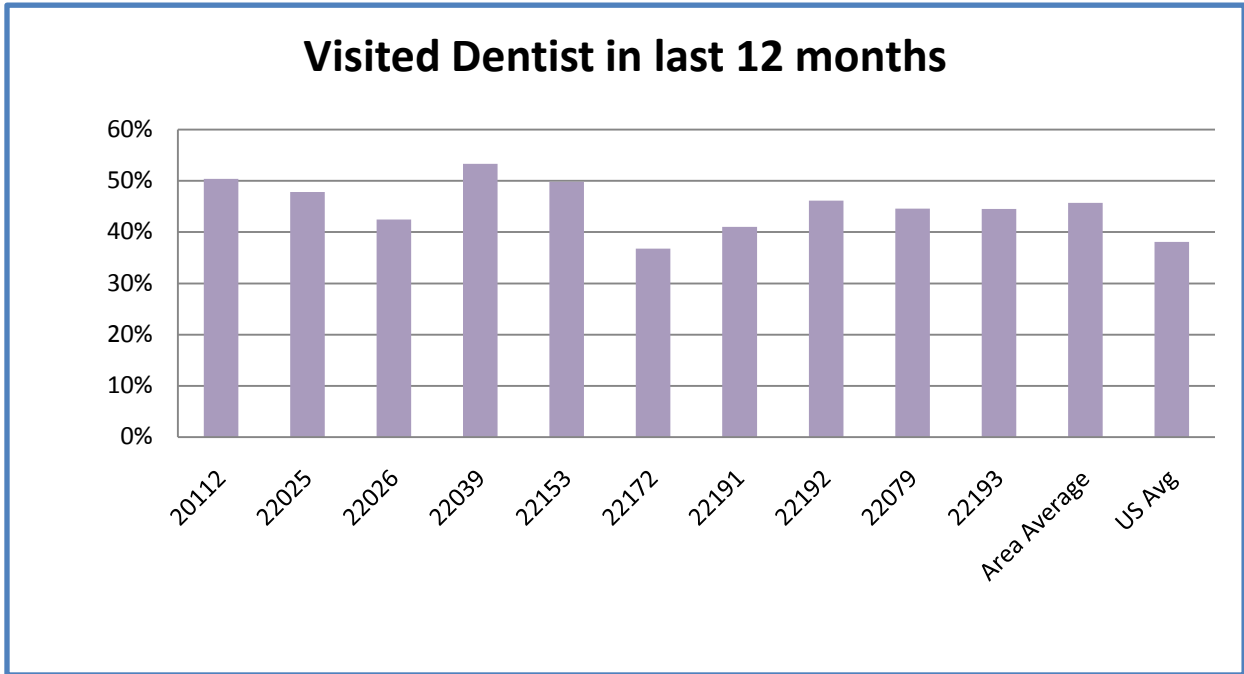


Fig 7.4 : Dental insurance coverage, 2010

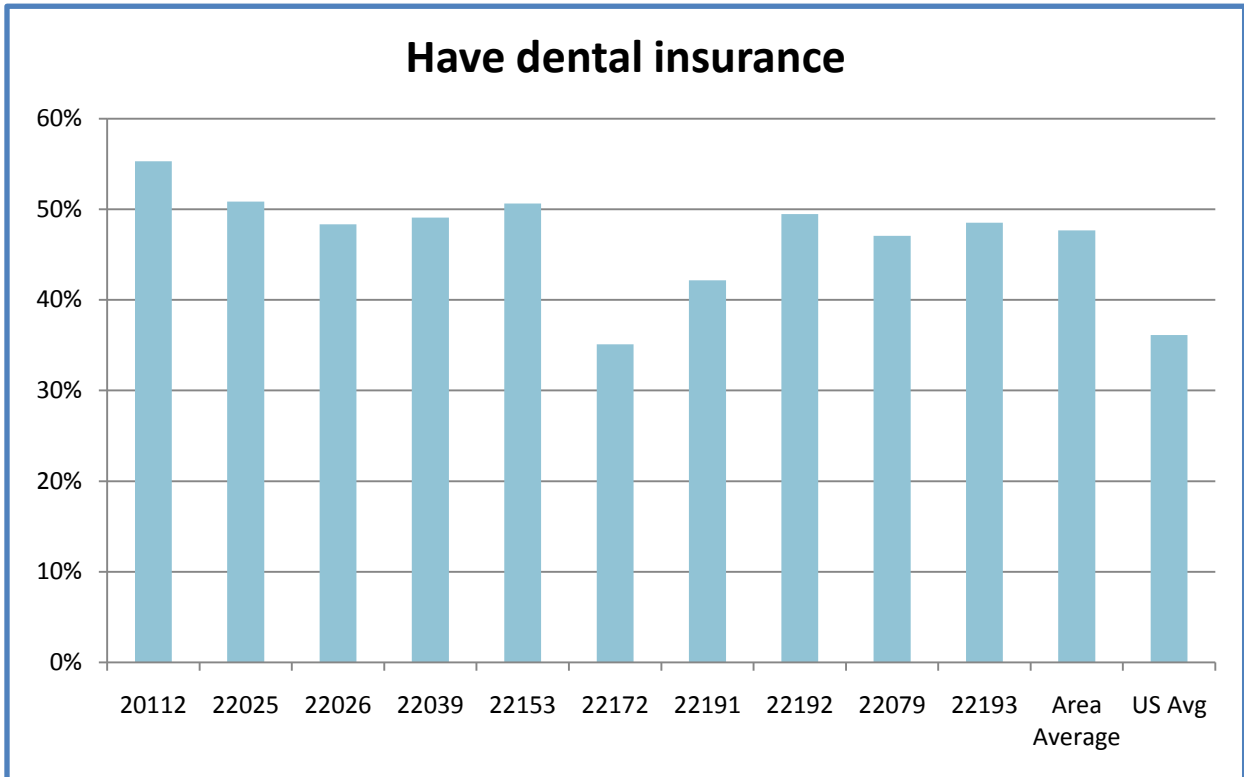
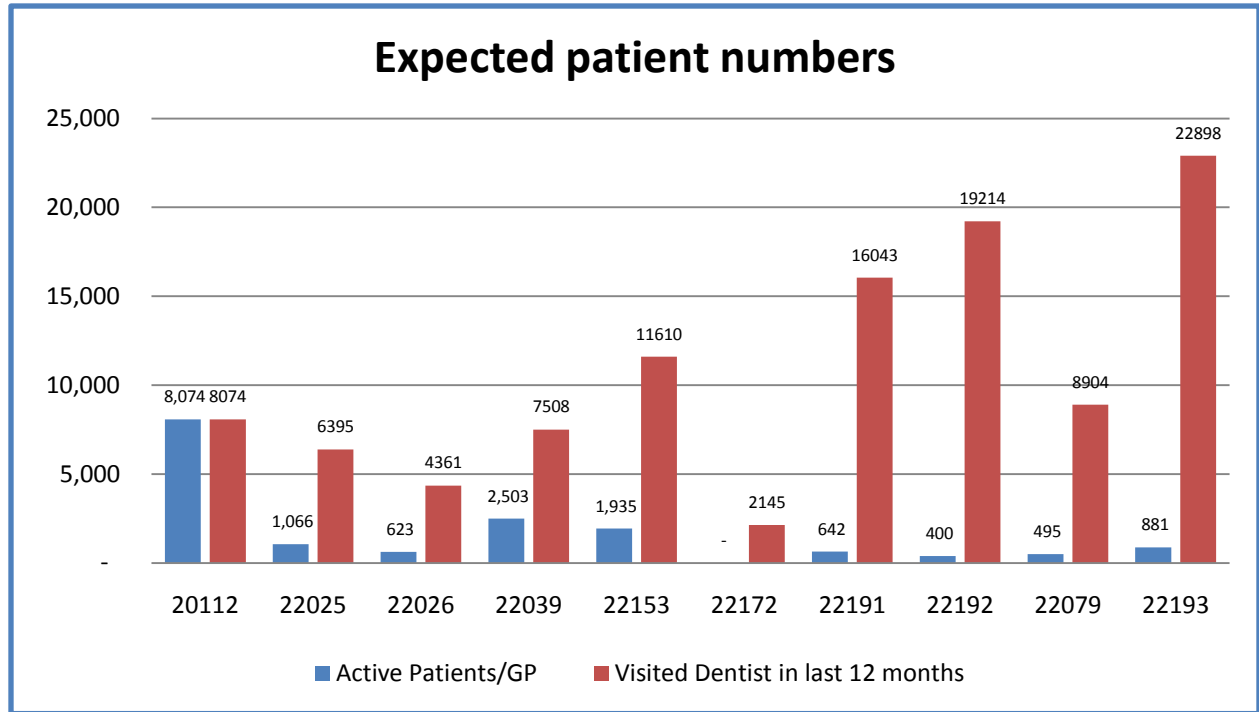


Fig 7.5: Expected patient numbers, 2010



Marketing Analysis

In the area surrounding the practice, we find that people tend to use the internet much more than the regular population. For example, the use of yellow pages online is nearly 50% higher in the Woodbridge than in the U.S. on average. This means that having a prominent online Yellow Pages marketing will be important. Interestingly, print Yellow Pages are still used quite frequently, actually slightly more than average and many people will still use yellow pages to find a dentist. Overall, since we see a bigger emphasis on online Yellow Pages use, the recommended strategy would be to minimize print Yellow Pages marketing and increase online Yellow Pages presence.

One particular aspect that is important in this area is that a large proportion of the population will look for medical and dental information online. In fact, close to one fifth of the population has looked at this kind of information in just the last 30 days, this is significantly above the national average. This means that they are actively searching for dental information online and tend to trust it, so a well designed website that provides information to the patients to help lead them from their conditions to the treatment recommendations presented by the doctor will be a very good marketing tool.

Oral hygiene tends to be above average in this area, as we can see the number of people who use floss is higher than average. What this suggests is that people generally tend to be aware of the importance of flossing and practice it. This preventative mindset can be promoted to explain to patients the systemic connections of periodontal disease as well as the importance of prevention. Since these people are clearly already health conscious, compliance with hygiene recall protocols should be high. However, periodontal disease would likely be less prevalent, and therefore adjunctive hygiene services like oral cancer screenings will be useful to maintain high hygiene production.

We do expect to be having a fair amount of emergency patients in this area. Even though use of toothache remedies is less than average, it is still significant enough to indicate a baseline dental disease prevalence. Due to the other high income, high health mindset characteristics of this population, these emergency patients are likely to seek dental care fairly soon after developing toothaches and are likely to be willing to spend the money to restore and maintain their teeth through root canals and crowns instead of extractions. However, the downside is that these patients need to be seen very fast, preferably same day, because their concern for their dental problem will often cause them to seek the closest dentist who has an opening, so if this practice cannot accommodate them on short notice, they will seek care elsewhere. While we do not recommend setting aside special time for emergencies in the schedule, being able to place emergencies daily next to non-doctor intensive procedures (such as fillings, adjustments, crown seats etc), will generally make the practice very accessible to the type of emergency patients likely to be seen here.

We also note that the rates of edentulism in this area are quite low. Most people are not only of the younger ages, but even the older patients tend to keep many of their teeth for a longer time. This suggests that dentures will not be very common here at all. However, we expect that those patients with dentures would very interested into converting them to implant overdentures, so a broad skill set including those services will be important for the practice. While total edentulism rates will be low,

partial edentulism will be more common among the older groups. Once again, due to the social characteristics of the population, they would generally be interested in implants and be willing to undergo the time and expense to restore their dentition to the youthful appearance that is prevalent in the majority of the people in this area.

Finally, an above average amount of people in this area use whitening toothpaste, suggesting that they seek out ways to whiten their teeth and are more cosmetically conscious than most. While many cosmetic services have decreased in demand due to the economy, whitening is one that is still popular due to its relative affordability. Since the patients are well educated, they can typically appreciate the differences between OTC and professional whitening. What we find to be effective is some offers for new or referral patients that allow them to get some entry-level whitening done at limited cost, which tends to bring them into the practice. One simple way to build patient loyalty would be to actually give them whitening toothpaste at their hygiene and recall appointments and point this out to them. Since they already appreciate that product, they will often feel that they are receiving above average attention by the practice which is being sensitive to their needs.

Section 8: Psychographics by Zip Code

20112

Primary Psychographics Segment: Boomburbs

The newest additions to the suburbs, Boomburbs communities are home to younger families who live a busy, upscale lifestyle. The median age is 33.7 years. This market has the highest population growth at 5.3 percent annually—more than four and one-half times the national figure. The median home value is \$334,829, and most households have two earners and two vehicles. This is the top market for households to own projection TVs, MP3 players, scanners, and laser printers as well as owning or leasing full-sized SUVs. It is the second-ranked market for owning flat-screen or plasma TVs, video game systems, and digital camcorders as well as owning or leasing minivans. Family vacations are a top priority. Popular vacation destinations are Disney World and Universal Studios, Florida. For exercise, residents play tennis and golf, ski, and jog.



What it means for the dental practice: This is a fast growing market with significant disposable income. It is one of the best sources of new patients. The families are a little older, and while their children have not left yet, the parents still have enough disposable income to afford comprehensive and some cosmetic care. This population spends significant amounts on their children and wants the best treatment for them. Because of this, they will often seek a pedodontist office directly for their children rather than going through a GP.

Secondary Psychographics Segment: Suburban Splendor

These successful suburbanites are the epitome of upward mobility, just a couple of rungs below the top, situated in growing neighborhoods of affluent homes with a median value of \$442,916. Most households are composed of two-income, married-couple families with or without children. The population is well educated and well employed, with a median age of 41.5 years. Home improvement and remodeling are a main focus of Suburban Splendor residents. Their homes feature the latest amenities and reflect the latest in home design. Residents travel extensively in the United States and overseas for business and pleasure. Leisure activities include physical fitness, reading, visiting museums, or attending the theater. This market is proactive in tracking investments, financial planning, and holding life insurance policies.



What it means for the dental practice: These are very successful families who are very proactive in their lifestyle, especially in finance and health. They often enjoy interest free third party financing because they are used to managing money smartly. They also tend to value health, and understand the importance of dental health. They are very aware of the importance of prevention. They are willing to spend significant amounts of money on extensive comprehensive dentistry, such as full mouth

reconstruction, as long as they truly see the value in it and how it will help resolve issues they are having. Since these families often have ascended from middle class beginnings, they typically do need dental care and they are especially willing to pay for the very best treatment for their children, which often means they would want to see a pedodontist, but would stay with a family practice if they feel it's the right fit for the kids.

Tertiary Psychographics Segment: Sophisticated Squires

Sophisticated Squires residents enjoy cultured country living in newer home developments with low density and a median home value of \$268,921. These urban escapees are primarily married-couple families, educated, and well employed. They prefer to commute to maintain their semi-rural lifestyle. The median age is 38.3 years. They do their own lawn and landscaping work as well as home improvement and remodeling projects such as installing carpet or hardwood floors and interior painting. They like to barbeque on their gas grills and make bread with their bread-making machines. This is the top market for owning three or more vehicles. Vehicles of choice are minivans and full-sized SUVs. Family activities include playing volleyball, bicycling, playing board games and cards, going to the zoo, and attending soccer and baseball games.



What it means for the dental practice: This is a market with significant disposable income and high demand for dental services. It is a great source for new patients, especially for orthodontics as their children are generally getting close to orthodontic treatment age. These families generally already have a family dentist or pedodontist for their children, therefore capturing the referral base for these patients is extremely important. Our clients have seen great success by sponsoring children's leagues and other community events to build trust and rapport in the community. Because they are used to commuting to work over long distances, they are more likely to go out of their way to visit a practice that they really like, as long as it offers convenient hours.

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Secondary Psychographics Segment: In Style



In Style residents live in affluent neighborhoods of metropolitan areas. More suburban than urban, they nevertheless embrace an urban lifestyle. Townhome ownership is more than double that of the national level; however, more than half of the households are traditional single-family homes. Labor force participation is high, and professional couples predominate. The median household income is \$72,326. Nearly one-third of these households include children. The median age is 40.3 years. In Style residents are computer savvy; they use the Internet daily to research information, track investments, or shop. They own a diverse investment portfolio, contribute to retirement savings plans, and hold long-term care and life insurance policies. They enjoy going to the beach, snorkeling, playing golf, casino gambling, and domestic travel.

What it means for the dental practice: These are middle and upper middle class families who are successful, and are particularly savvy when it comes to marketing, internet and technology. They are one the most likely groups to search for a dentist online, post an online review of a dental practice. They are as likely to choose a dentist based on internet recommendations as based on the recommendations and co-workers. They appreciate the ability to schedule and confirm appointments online, as well as receive appointment confirmations online. They enjoy the high tech aspect of dental practices, such as TVs and headsets in the operatory, internet stations in the waiting room and computer based treatment plan presentations.

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These successful suburbanites are the epitome of upward mobility, just a couple of rungs below the top, situated in growing neighborhoods of affluent homes with a median value of \$442,916. Most households are composed of two-income, married-couple families with or without children. The population is well educated and well employed, with a median age of 41.5 years. Home improvement and remodeling are a main focus of Suburban Splendor residents. Their homes feature the latest amenities and reflect the latest in home design. Residents travel extensively in the United States and overseas for business and pleasure. Leisure activities include physical fitness, reading, visiting museums, or attending the theater. This market is proactive in tracking investments, financial planning, and holding life insurance policies.

What it means for the dental practice: These are very successful families who are very proactive in their lifestyle, especially in financial and health. They often enjoy interest free third party financing because they are used to managing money smartly. They also tend to value health, and understand the importance of dental health. They are very aware of the importance of prevention. They are willing to spend significant amounts of money on extensive comprehensive dentistry, such as full mouth reconstruction, as long as they truly see the value in it and how it will help resolve issues they are having. Since these families often have ascended from middle class beginnings, they typically do need dental care and they are especially willing to pay for the very best treatment for their children, which often means they would want to see a pedodontist, but would stay with a family practice if they feel it's the right fit for the kids.

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Secondary Psychographics Segment: Enterprising Professionals



This fast-growing market is home to young, educated, working professionals, with a median age of 32.4 years. Single or married, they prefer newer neighborhoods with townhomes or apartments. The median household income is \$71,018. This segment is ranked second of all the Community Tapestry markets for labor force participation, at 75 percent. Their lifestyle reflects their youth, mobility, and growing consumer clout. Residents rely on cell phones and PCs to stay in touch. They use the Internet to find their next job or home, track their investments, and shop. They own the latest electronic gadgets. Leisure activities include yoga, playing Frisbee and football, jogging, going to the movies, and attending horse races and basketball games. These residents also travel frequently, both domestically and overseas.

What it means for the dental practice: These are typically young singles or couples. They generally do not need much dental work because they are young and healthy; however they are often interested in cosmetic dentistry, invisible braces and bleaching. Like the "In Style" group, they are also technologically very savvy and appreciate a high-tech practice. We often find a disproportionately high amount of developing TMD issues in this group, especially in females, due to the stressful nature of their fast paced jobs and lifestyles.

Tertiary Psychographics Segment: Aspiring Young Families



Aspiring Young Families neighborhoods are located in large, growing metropolitan areas in the South and West, with the highest concentrations in California, Florida, and Texas. Mainly composed of young, married-couple families or single parents with children, the median age for this segment is 30.6 years. Nearly half of the households are owner-occupied, single-family dwellings or townhomes, and over half are occupied by renters, many living in newer, multiunit buildings. Residents spend much of their discretionary income on baby and children's products and toys as well as home furnishings. Recent electronic purchases include cameras and video game systems. Leisure activities include dining out, dancing, going to the movies, attending professional football games, fishing, weight lifting, and playing basketball. Typically, vacations would include visits to theme parks. Internet usage mainly involves chat room visits.

What it means for the dental practice: This is a segment of the population that is just coming into its own. The parents are quite young, which means they do not have extensive needs. They are not committing to cosmetic treatment because they are primarily concerned with household expenditures. Nevertheless, their young children tend to be at the prime age for pediatric dental needs such as sealants and prophylaxis. This group will not necessarily seek out a pediatric dentist for their children, and would be willing to go to a dental office as long as it presents itself as kid-friendly.

Primary Psychographics Segment: Top Rung



Top Rung is the wealthiest consumer market, representing less than one percent of all U.S. households. The median household income of \$200,449 is more than three and one-half times that of the national median, and the median net worth of more than a million dollars is nearly ten times that of the national level. The median home value is \$1,042,864. These educated residents are in their peak earning years, 45-64, in married-couple households, with or without children. The median age is 42.4 years. With the purchasing power to indulge any choice, Top Rung residents travel in style, both domestically and overseas. This is the top market for owning or leasing a luxury car; residents favor new imported vehicles, especially convertibles. Avid readers, these residents find time to read two or more daily newspapers and countless books.

What it means for the dental practice: This is the wealthiest segment of the population and can afford the most comprehensive and expensive dentistry. Having been used to a luxury lifestyle, they tend to be quite demanding and expect the very best in dental care, such as the aesthetics of their restorative care. They are also very attentive to how they are treated by office staff, and will easily take their business elsewhere if they feel they are not being treated with the highest degree of customer service. Yet, when they do find an office they like, they tend to patronize it extensively and are not only great patients, but tend to be influential referral sources due to their typically high status in the community.

Secondary Psychographics Segment: Suburban Splendor



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What it means for the dental practice: These are very successful families who are very proactive in their lifestyle, especially in finance and health. They often enjoy interest free third party financing because they are used to managing money smartly. They also tend to value health, and understand the importance of dental health. They are very aware of the importance of prevention. They are willing to spend significant amounts of money on extensive comprehensive dentistry, such as full mouth reconstruction, as long as they truly see the value in it and how it will help resolve issues they are

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Tertiary Psychographics Segment: Connoisseurs



Second in wealth to Top Rung but first for conspicuous consumption, Connoisseurs residents are well educated and somewhat older, with a median age of 47.3 years. Although residents appear closer to retirement than child rearing age, many of these married couples have children who still live at home. Their neighborhoods tend to be older bastions of affluence where the median home value is \$706,720. Growth in these neighborhoods is slow. Residents spend money for nice homes, cars, clothes, and vacations. Exercise is a priority; they work out weekly at a club or other facility, ski, play golf, snorkel, play tennis, practice yoga, and jog. Active in the community, they work for political candidates or parties, write or visit elected officials, and participate in local civic issues.

What it means for the dental practice: This is a market with significant disposable income and high demand for dental services. It is a great source for new patients, especially for orthodontics as their children are generally getting close to orthodontic treatment age. These families generally already have a family dentist or pedodontist for their children, therefore capturing the referral base for these patients is extremely important. Our clients have seen great success by sponsoring children's leagues and other community events to build trust and rapport in the community. Because they are used to commuting to work over long distances, they are more likely to go out of their way to visit a practice that they really like, as long as it offers convenient hours.

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Secondary Psychographics Segment: Sophisticated Squires



Sophisticated Squires residents enjoy cultured country living in newer home developments with low density and a median home value of \$268,921. These urban escapees are primarily married-couple families, educated, and well employed. They prefer to commute to maintain their semi-rural lifestyle. The median age is 38.3 years. They do their own lawn and landscaping work as well as home improvement and remodeling projects such as installing carpet or hardwood floors and interior painting. They like to barbeque on their gas grills and make bread with their bread-making machines. This is the top market for owning three or more vehicles. Vehicles of choice are minivans and full-sized SUVs. Family activities include playing volleyball, bicycling, playing board games and cards, going to the zoo, and attending soccer and baseball games.

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Tertiary Psychographics Segment: In Style



In Style residents live in affluent neighborhoods of metropolitan areas. More suburban than urban, they nevertheless embrace an urban lifestyle. Townhome ownership is more than double that of the national level; however, more than half of the households are traditional single-family homes. Labor force participation is high, and professional couples predominate. The median household income is \$72,326.

Nearly one-third of these households include children. The median age is 40.3 years. In Style residents are computer savvy; they use the Internet daily to research information, track investments, or shop. They own a diverse investment portfolio, contribute to retirement savings plans, and hold long-term care and life insurance policies. They enjoy going to the beach, snorkeling, playing golf, casino gambling, and domestic travel.

What it means for the dental practice: These are middle and upper middle class families who are successful, and are particularly savvy when it comes to marketing, internet and technology. They are one the most likely groups to search for a dentist online, post an online review of a dental practice. They are as likely to choose a dentist based on internet recommendations as based on the recommendations and co-workers. They appreciate the ability to schedule and confirm appointments online, as well as receive appointment confirmations online. They enjoy the high tech aspect of dental practices, such as TVs and headsets in the operatory, internet stations in the waiting room and computer based treatment plan presentations.

Primary Psychographics Segment: Main Street, USA



Main Street, USA neighborhoods are a mix of single-family homes and multiunit dwellings found in the suburbs of smaller metropolitan cities, mainly in the Northeast, West, and Midwest. This market is similar to the United States when comparing household type, age, educational attainment, housing type, occupation, industry, and household income type distributions. The median age of 36.8 years matches that of the U.S. median. The median household income is a comfortable \$56,882. Homeownership is at 65 percent, and the median home value is \$205,391. Active members of the community, residents participate in local civic issues and work as volunteers. They take care of their lawns and gardens, and work on small home projects. They enjoy going to the beach and visiting theme parks as well as playing chess, going bowling or ice skating, and participating in aerobic exercise.

What it means for the dental practice: While by no means a wealthy population, this established group has the income and home equity to afford comprehensive dentistry. We find that due to their involvement in civic projects and volunteerism, they respond very well to a dentist's community involvement. Unlike some more sedentary population segments, this group is fairly active, both in travel and in physical exercise. Therefore, they are more apt to be concerned with their health and appearance as well as be more willing to travel slightly longer to a dental practice if they feel this is warranted. These patients are excellent sources of internal referrals and can be attracted to a practice by offering them something that their current dentists does not offer, whether its technological or simply a different level of customer service.

Secondary Psychographics Segment: Inner City Tenants



Inner City Tenants neighborhoods are a microcosm of urban diversity, located primarily in the South and West. This multicultural market is young, with a median age of 27.9 years. Households are a mix of singles and families. Most residents rent economical apartments in mid- or high-rise buildings. Recent household purchases by this market include video game systems, baby food, baby products, and furniture. Internet access at home is not typical; those who have no access at home surf the Internet at school or at the library. Playing games and visiting chat rooms are typical online activities. Residents frequently eat at fast-food restaurants. They enjoy going to the movies; attending football and basketball games; water skiing; and playing football, basketball, and soccer. Some enjoy the nightlife, visiting bars and nightclubs to go dancing.

What it means for the dental practice: This segment of the population is not as likely to see the dentist. When they do, they tend to pay in cash and prefer to focus on their immediate problem and rarely come back for comprehensive dentistry. Many will not have dental insurance because they work many part time jobs without benefits.

Tertiary Psychographics Segment: Up and Coming Families



Up and Coming Families represents the second highest household growth market and, with a median age of 31.9 years, is the youngest of Community Tapestry's affluent family markets. The profile for these neighborhoods is young, affluent families with young children. Approximately half of the households are concentrated in the South, with another half in the West and Midwest. Neighborhoods are located in suburban outskirts of mid-sized metropolitan areas. The homes are newer, with a median value of \$213,306. Because family and home priorities dictate their consumer purchases, they frequently shop for baby and children's products and household furniture. Leisure activities include playing softball, going to the zoo, and visiting theme parks (generally SeaWorld or Disney World). Residents enjoy watching science fiction, comedy, and family-type movies on DVD.

What it means for the dental practice: This segment is one of the best segments for new patients. Many of these patients will come to the practice primarily for their children and stay on as hygiene or comprehensive care patients. Many of these patients will not have significant needs due to their younger age but they are more likely to take care of those needs or to go for elective treatment. However, these patients can become a very valuable part of the practice as they develop more dental needs over time.

Primary Psychographics Segment: Aspiring Young Families



Aspiring Young Families neighborhoods are located in large, growing metropolitan areas in the South and West, with the highest concentrations in California, Florida, and Texas. Mainly composed of young, married-couple families or single parents with children, the median age for this segment is 30.6 years. Nearly half of the households are owner-occupied, single-family dwellings or townhomes, and over half are occupied by renters, many living in newer, multiunit buildings. Residents spend much of their discretionary income on baby and children's products and toys as well as home furnishings. Recent electronic purchases include cameras and video game systems. Leisure activities include dining out, dancing, going to the movies, attending professional football games, fishing, weight lifting, and playing basketball. Typically, vacations would include visits to theme parks. Internet usage mainly involves chat room visits.

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Primary Psychographics Segment: Enterprising Professionals

This fast-growing market is home to young, educated, working professionals, with a median age of 32.4 years. Single or married, they prefer newer neighborhoods with townhomes or apartments. The median household income is \$71,018. This segment is ranked second of all the Community Tapestry markets for labor force participation, at 75 percent. Their lifestyle reflects their youth, mobility, and growing consumer clout. Residents rely on cell phones and PCs to stay in touch. They use the Internet to find their next job or home, track their investments, and shop. They own the latest electronic gadgets. Leisure activities include yoga, playing Frisbee and football, jogging, going to the movies, and attending horse races and basketball games. These residents also travel frequently, both domestically and overseas.

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Secondary Psychographics Segment: Milk and Cookies

Milk and Cookies households are composed mainly of young, affluent married-couple families. Approximately half of the households include children. The median age for this market is 34 years. Residents prefer single-family homes in suburban areas, chiefly in the South, particularly in Texas. Smaller concentrations of households are located in the West and Midwest. The median home value is \$148,781. Families with two or more workers, more than one child, and two or more vehicles is the norm for this market. Residents are well insured for the future. The presence of children drives their large purchases of baby and children's products and timesavers such as fast food. For fun, residents play video games, chess, backgammon, basketball and football, or fly kites. Favorite cable channels include Toon Disney, The Discovery Health Channel, ESPNNews, and Lifetime Movie Network.

What it means for the dental practice: This is a typical middle class suburban family. They generally have the income to afford most dental care, but are more conservative in their spending than some of the wealthier suburban groups. Their main focus is on their children, who are typically young. Unlike some other suburban groups, they are generally comfortable with having their family dentist see their kids, and often choose their dentist based on how suitable they are to the whole family. Therefore, highly focused types of general practices like "cosmetic dentistry" or "implant dentistry" tend to drive away this group.

Tertiary Psychographics Segment: Suburban Splendor



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What it means for the dental practice: This is a market with significant disposable income and high demand for dental services. It is a great source for new patients, especially for orthodontics as their children are generally getting close to orthodontic treatment age. These families generally already have a family dentist or pedodontist for their children, therefore capturing the referral base for these patients is extremely important. Our clients have seen great success by sponsoring children's leagues and other community events to build trust and rapport in the community. Because they are used to commuting to work over long distances, they are more likely to go out of their way to visit a practice that they really like, as long as it offers convenient hours.

Secondary Psychographics Segment: Up and Coming Families



Up and Coming Families represents the second highest household growth market and, with a median age of 31.9 years, is the youngest of Community Tapestry's affluent family markets. The profile for these neighborhoods is young, affluent families with young children. Approximately half of the households are concentrated in the South, with another half in the West and Midwest. Neighborhoods are located in suburban outskirts of mid-sized metropolitan areas. The homes are newer, with a median value of \$213,306. Because family and home priorities dictate their consumer purchases, they frequently shop for baby and children's products and household furniture. Leisure activities include playing softball, going to the zoo, and visiting theme parks (generally SeaWorld or Disney World). Residents enjoy watching science fiction, comedy, and family-type movies on DVD.

What it means for the dental practice: This segment is one of the best segments for new patients. Many of these patients will come to the practice primarily for their children and stay on as hygiene or comprehensive care patients. Many of these patients will not have significant needs due to their younger age but they are more likely to take care of those needs or to go for elective treatment.

However, these patients can become a very valuable part of the practice as they develop more dental needs over time.

Tertiary Psychographics Segment: Milk and Cookies



Milk and Cookies households are composed mainly of young, affluent married-couple families. Approximately half of the households include children. The median age for this market is 34 years. Residents prefer single-family homes in suburban areas, chiefly in the South, particularly in Texas. Smaller concentrations of households are located in the West and Midwest. The median home value is \$148,781. Families with two or more workers, more than one child, and two or more vehicles is the norm for this market. Residents are well insured for the future. The presence of children drives their large purchases of baby and children's products and timesavers such as fast food. For fun, residents play video games, chess, backgammon, basketball and football, or fly kites. Favorite cable channels include Toon Disney, The Discovery Health Channel, ESPNNews, and Lifetime Movie Network.

What it means for the dental practice: This is a typical middle class suburban family. They generally have the income to afford most dental care, but are more conservative in their spending than some of the wealthier suburban groups. Their main focus is on their children, who are typically young. Unlike some other suburban groups, they are generally comfortable with having their family dentist see their kids, and often choose their dentist based on how suitable they are to the whole family. Therefore, highly focused types of general practices like “cosmetic dentistry” or “implant dentistry” tend to drive away this group.