



September 25-28, 2017 • Atlanta Marriott Marquis • Atlanta, Georgia

Are there any providers left to recruit?

Aaron Groffman

September 27, 2017



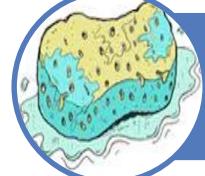
Discussion Topics



Dental PPO networks continue to grow



How has growth affected network overlap?

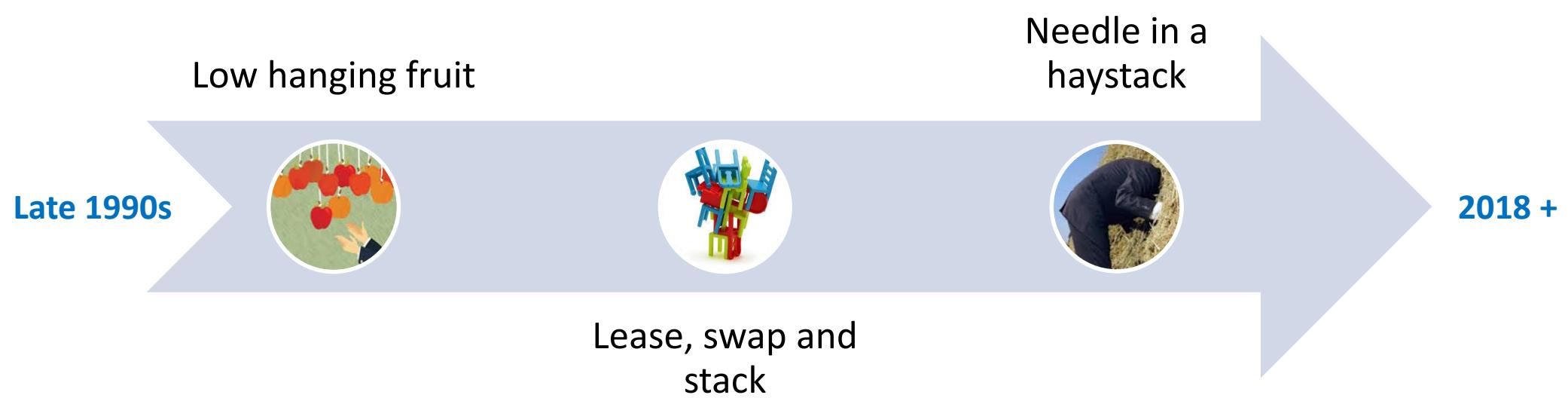


How saturated is the market?



Are there still viable recruitment opportunities?

PPO network evolution

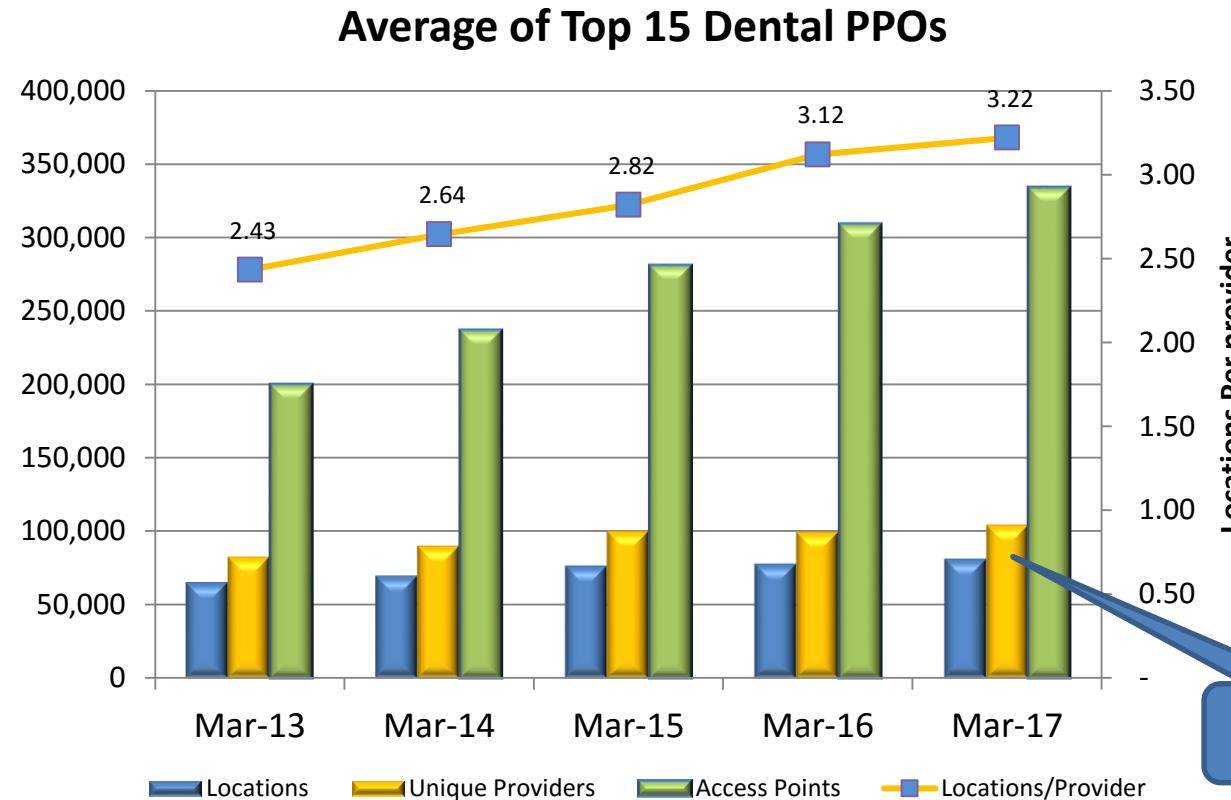




Network Growth and Overlap

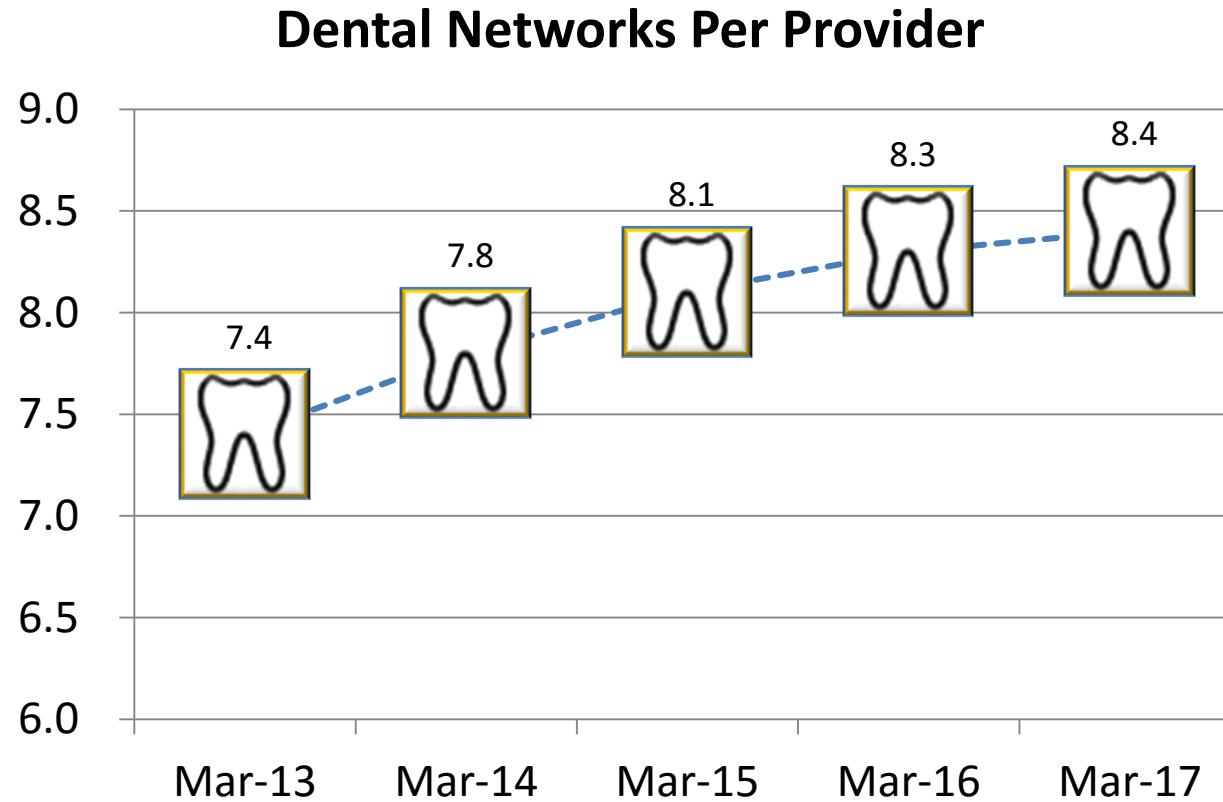


Dental networks are growing



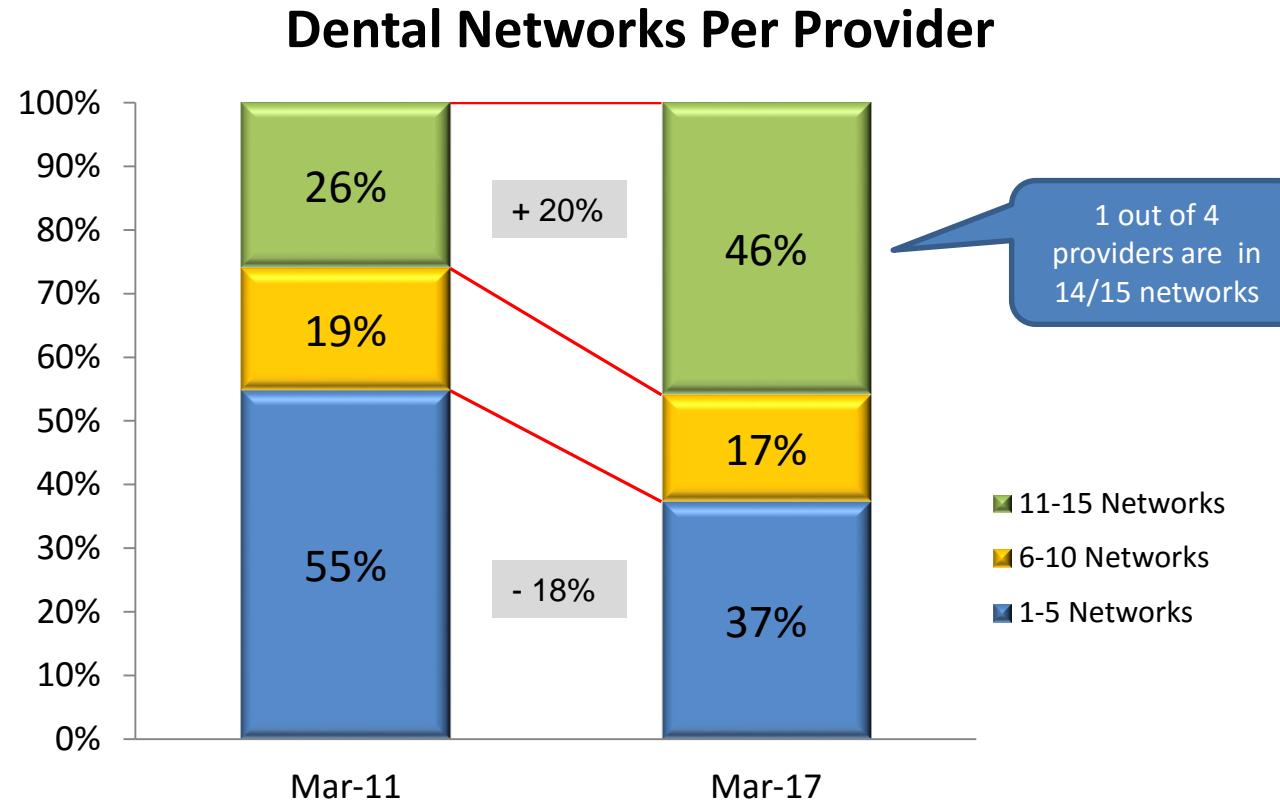
Source: NetMinder, March 2017

Providers are joining more networks



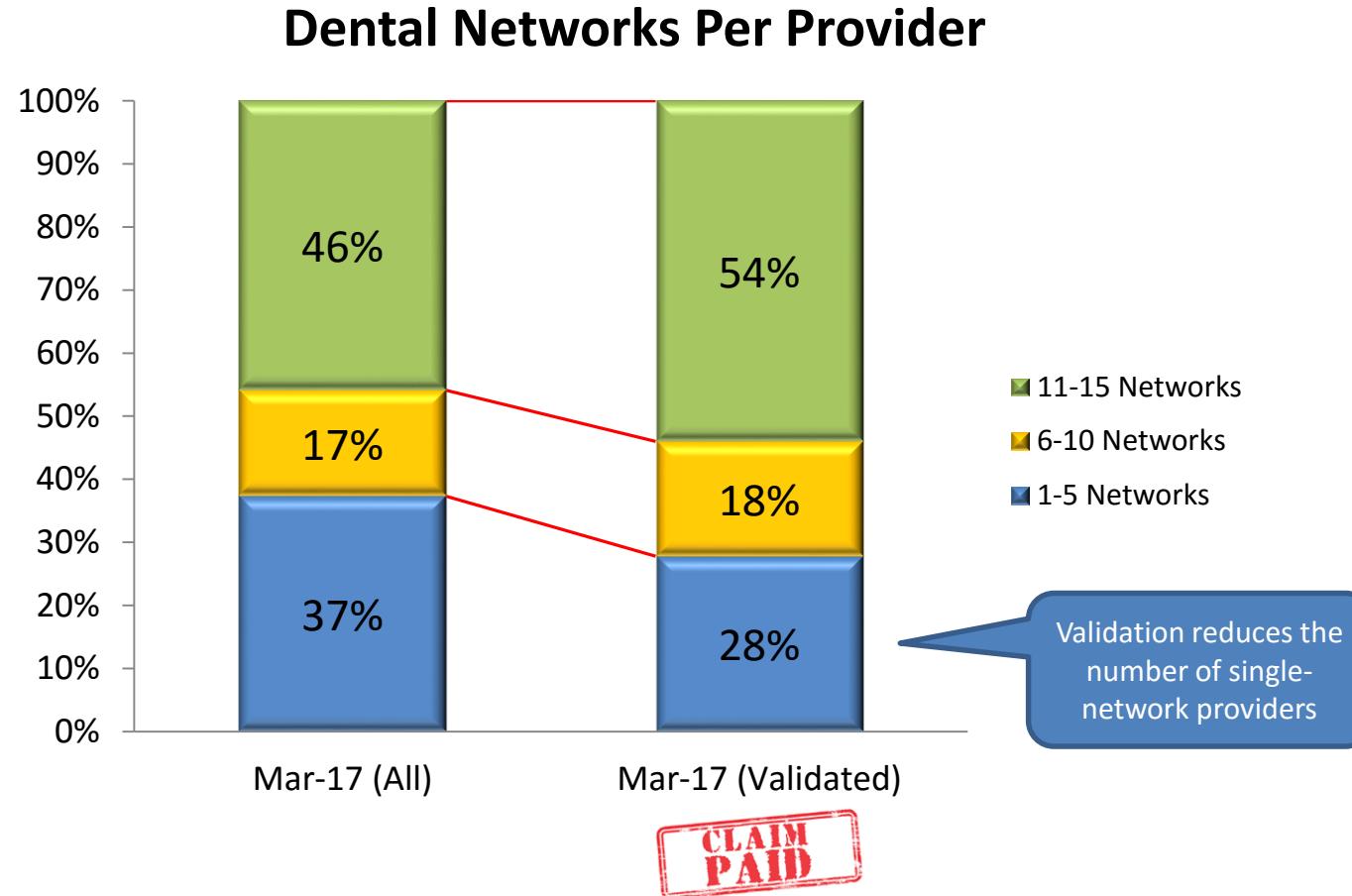
Source: NetMinder, March 2017

Providers are joining more networks



Source: NetMinder, March 2017

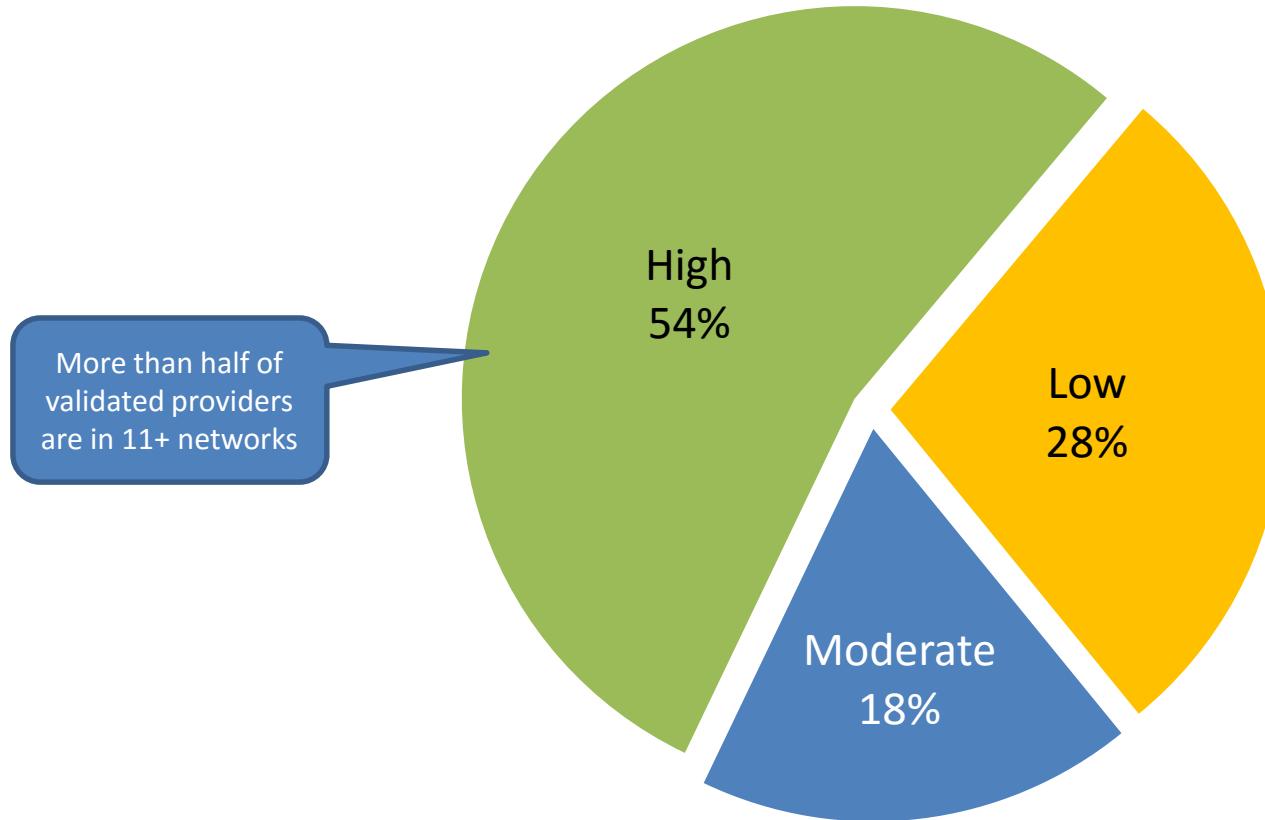
Providers are joining more networks



Source: NetMinder, March 2017

Resulting in high overlap between networks

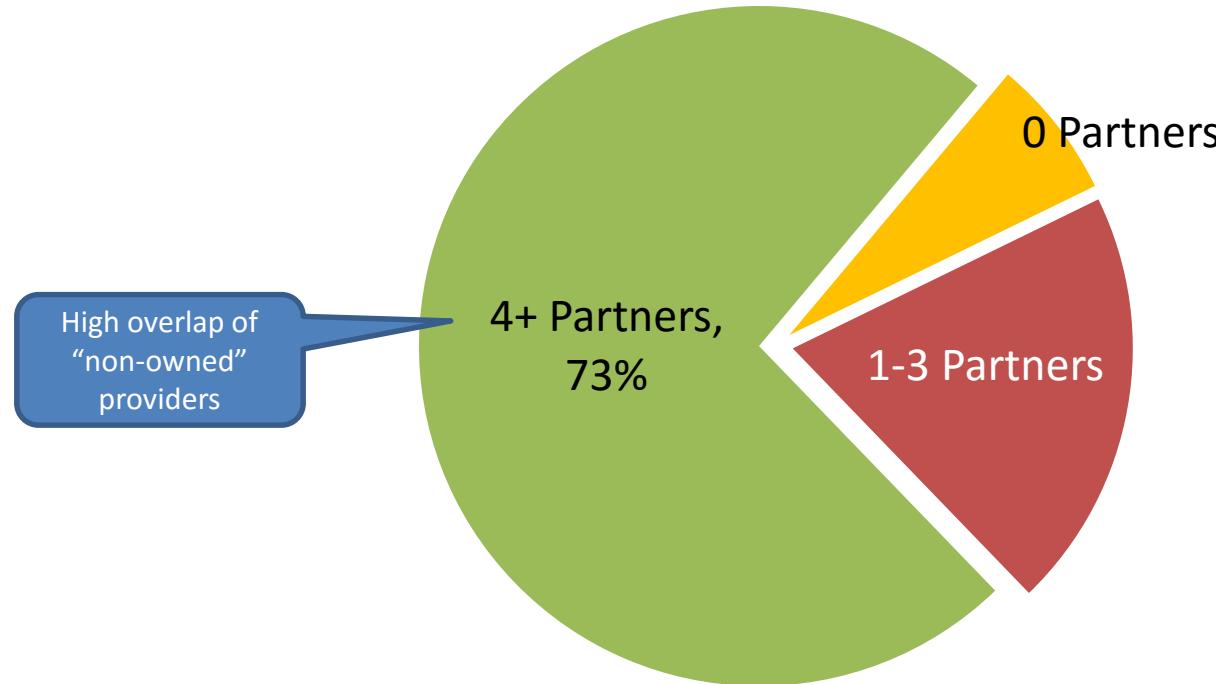
Network Overlap Among Top 15 PPOs



Source: NetMinder, March 2017

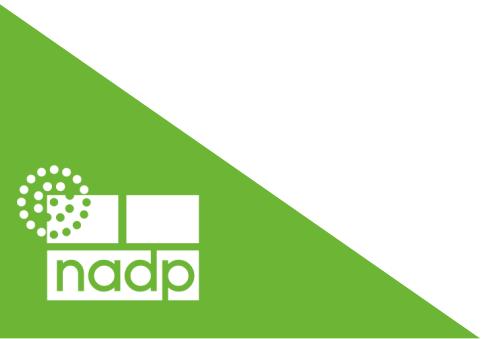
More networks are partnering

Number of Network Partners

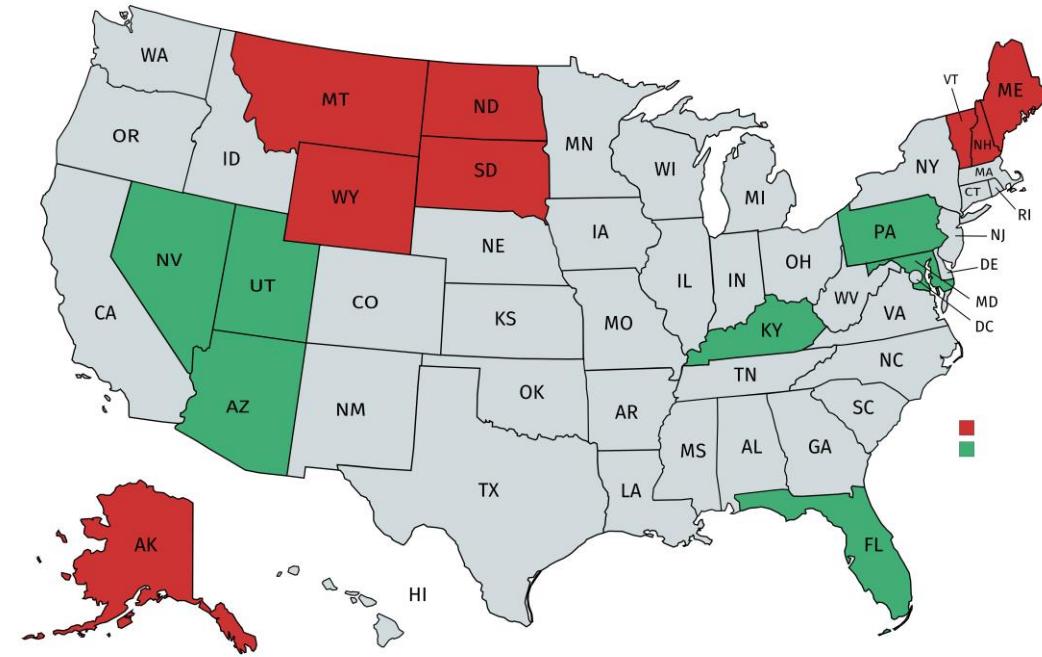
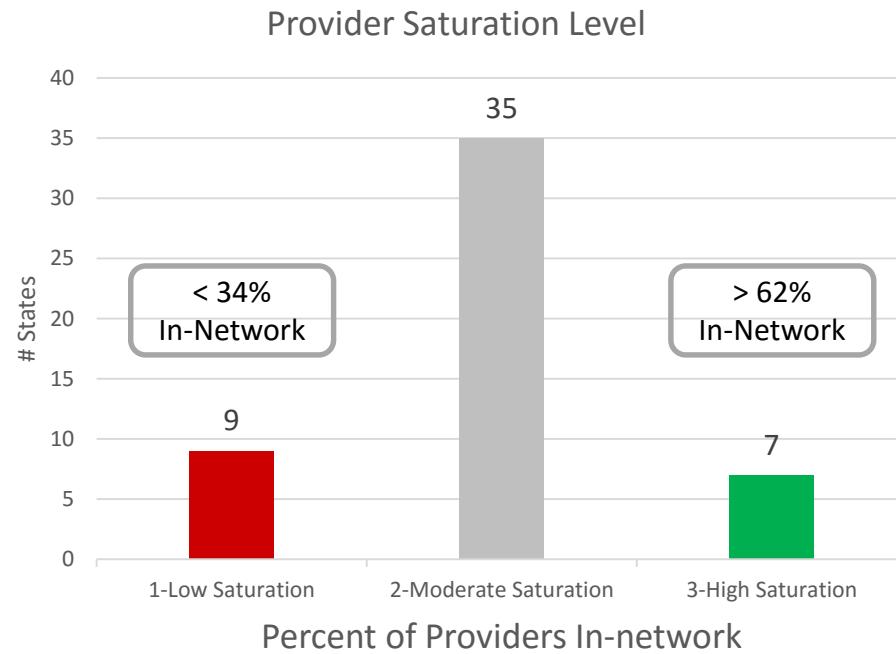


Source: NetMinder, March 2017

Market Saturation

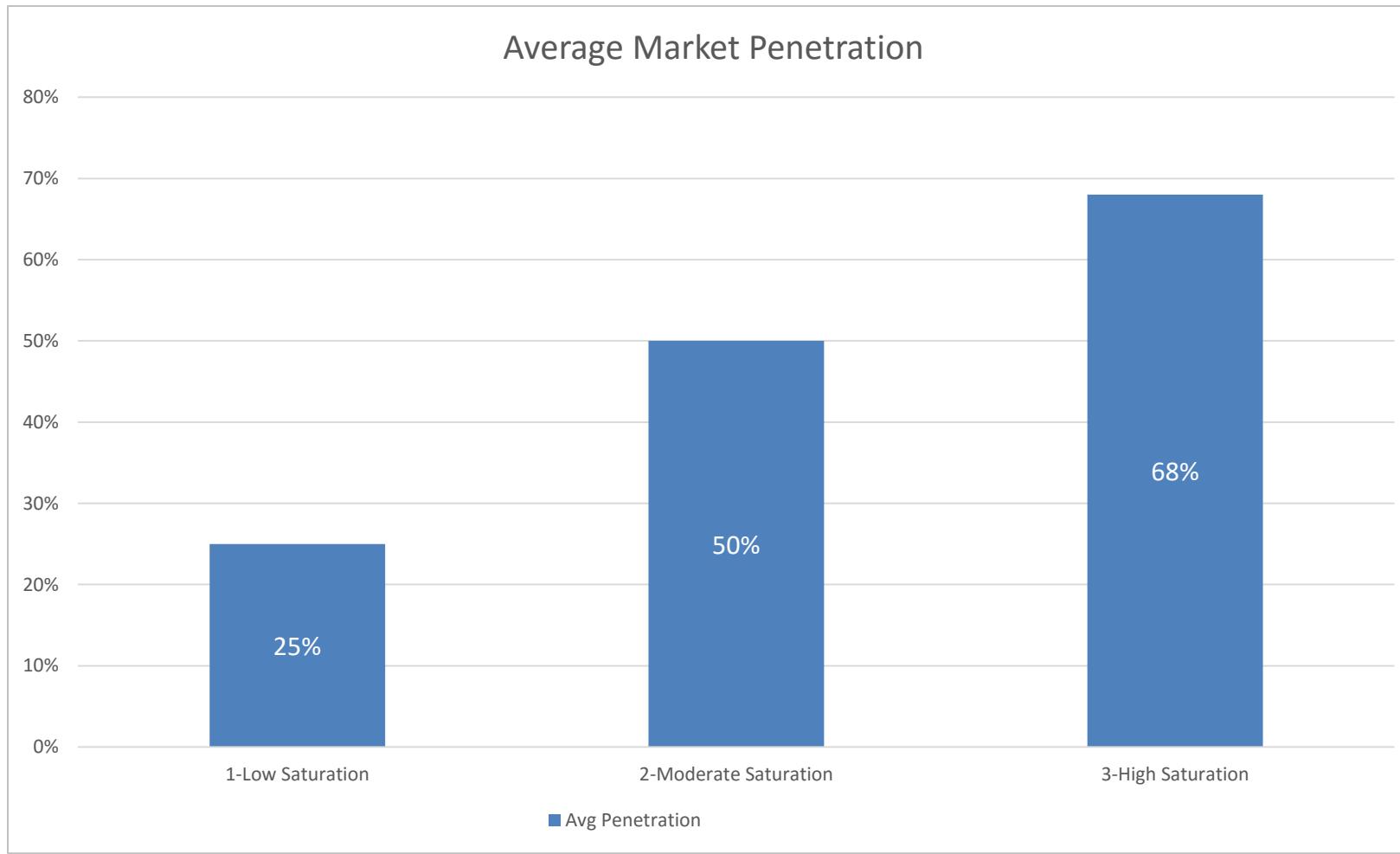


Is the market saturated?



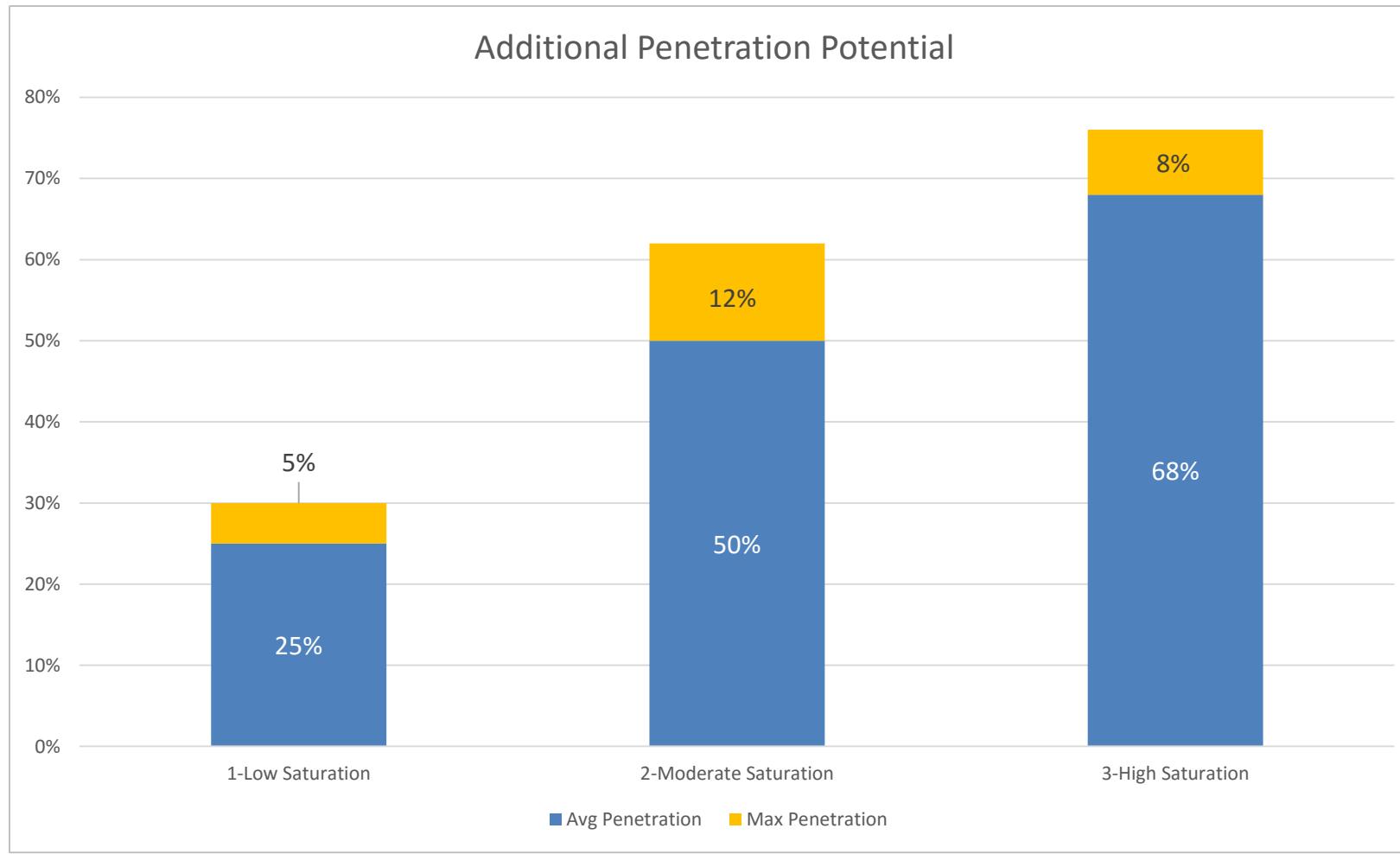
Source: NetMinder, March 2017

Is the market saturated?



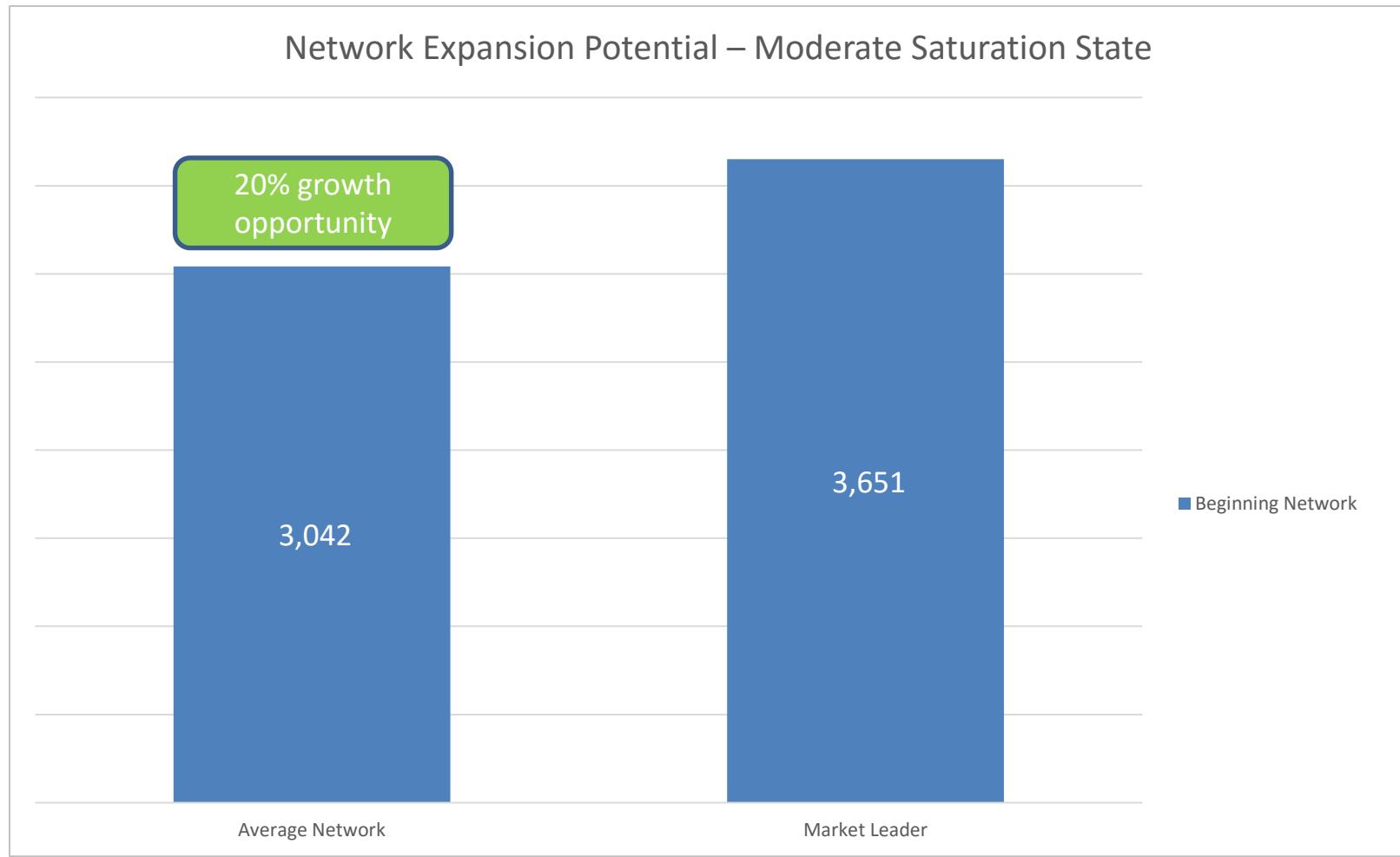
Source: NetMinder, March 2017

Is the market saturated?



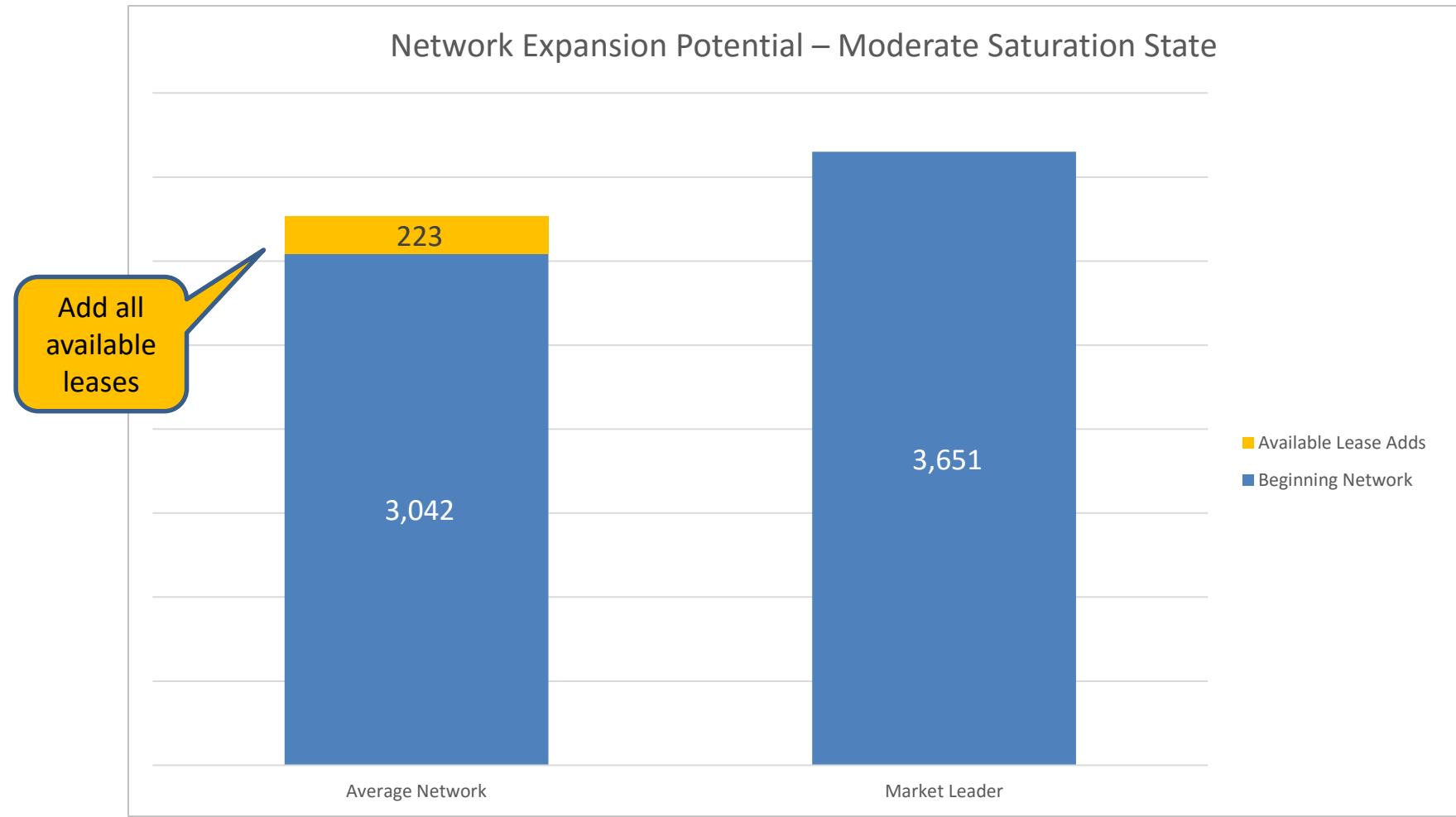
Source: NetMinder, March 2017

Is the market saturated?



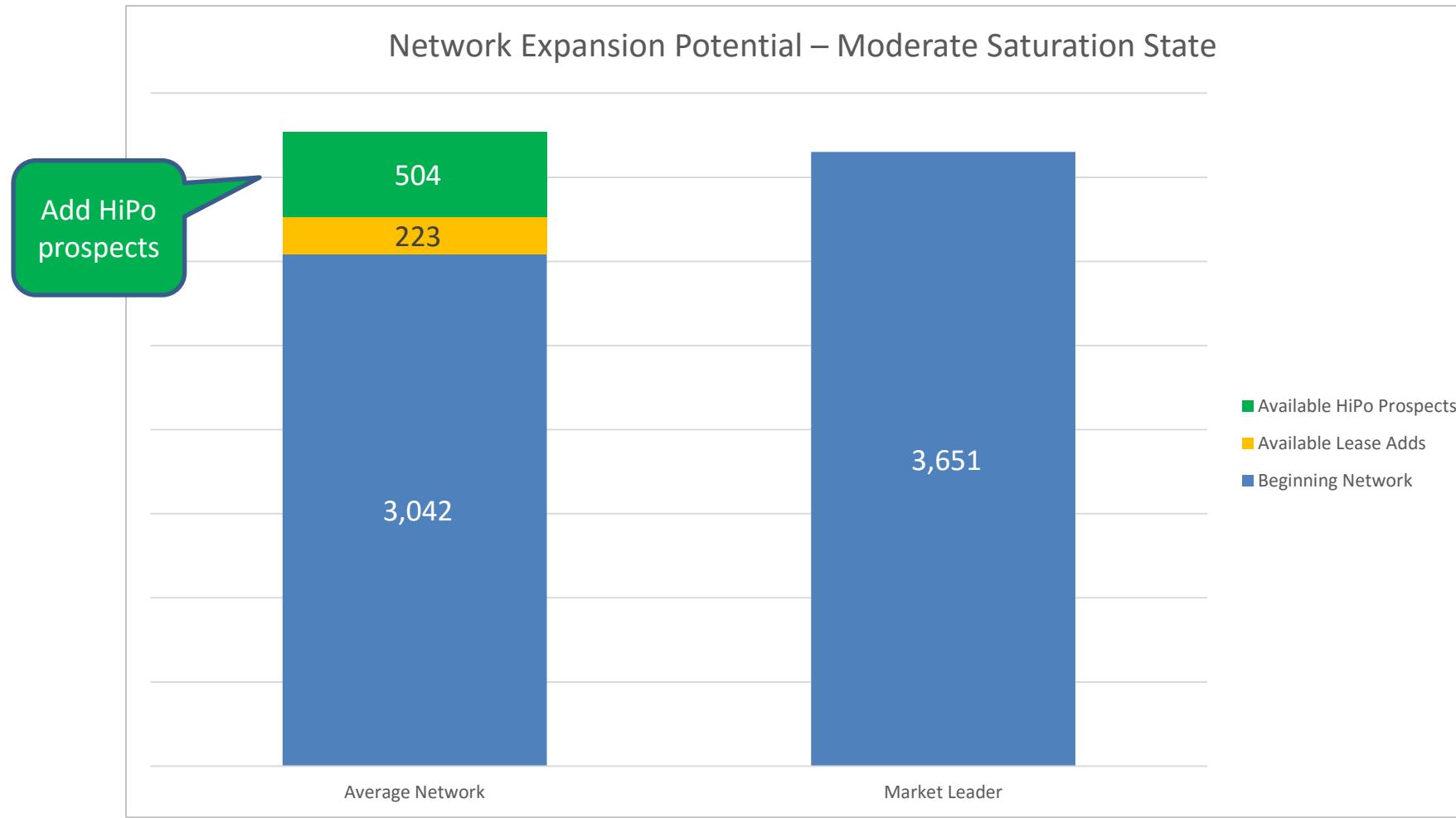
Source: NetMinder, March 2017

Is the market saturated?



Source: NetMinder, March 2017

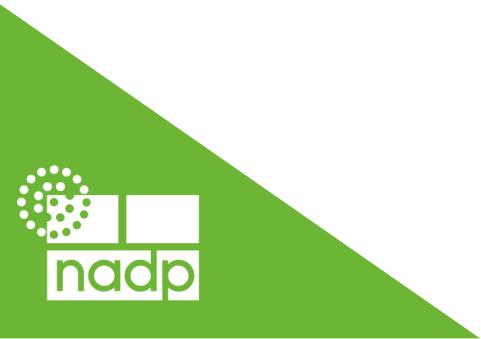
Is the market saturated?



Source: NetMinder, March 2017

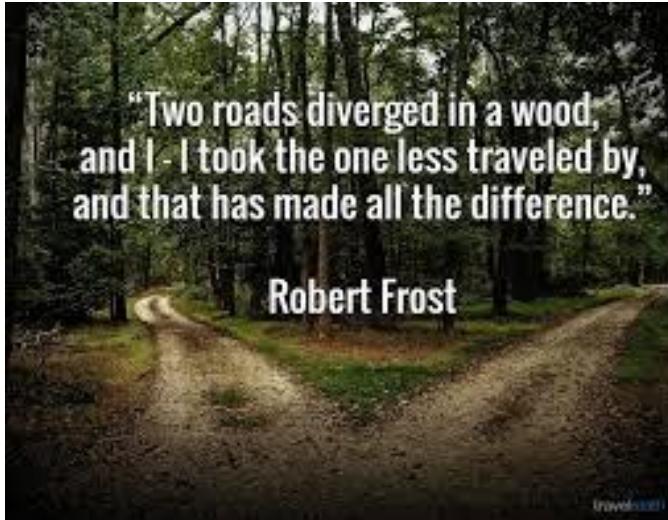


Viable Recruitment Prospects



Recruiting strategies

Providers in just a few networks



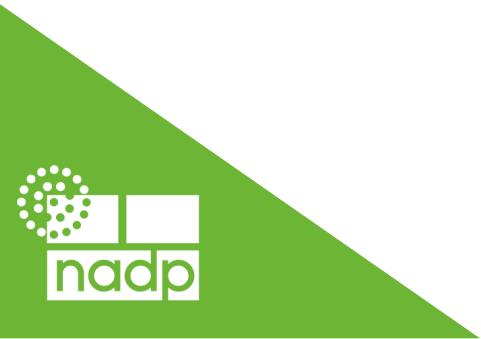
Providers already in many networks



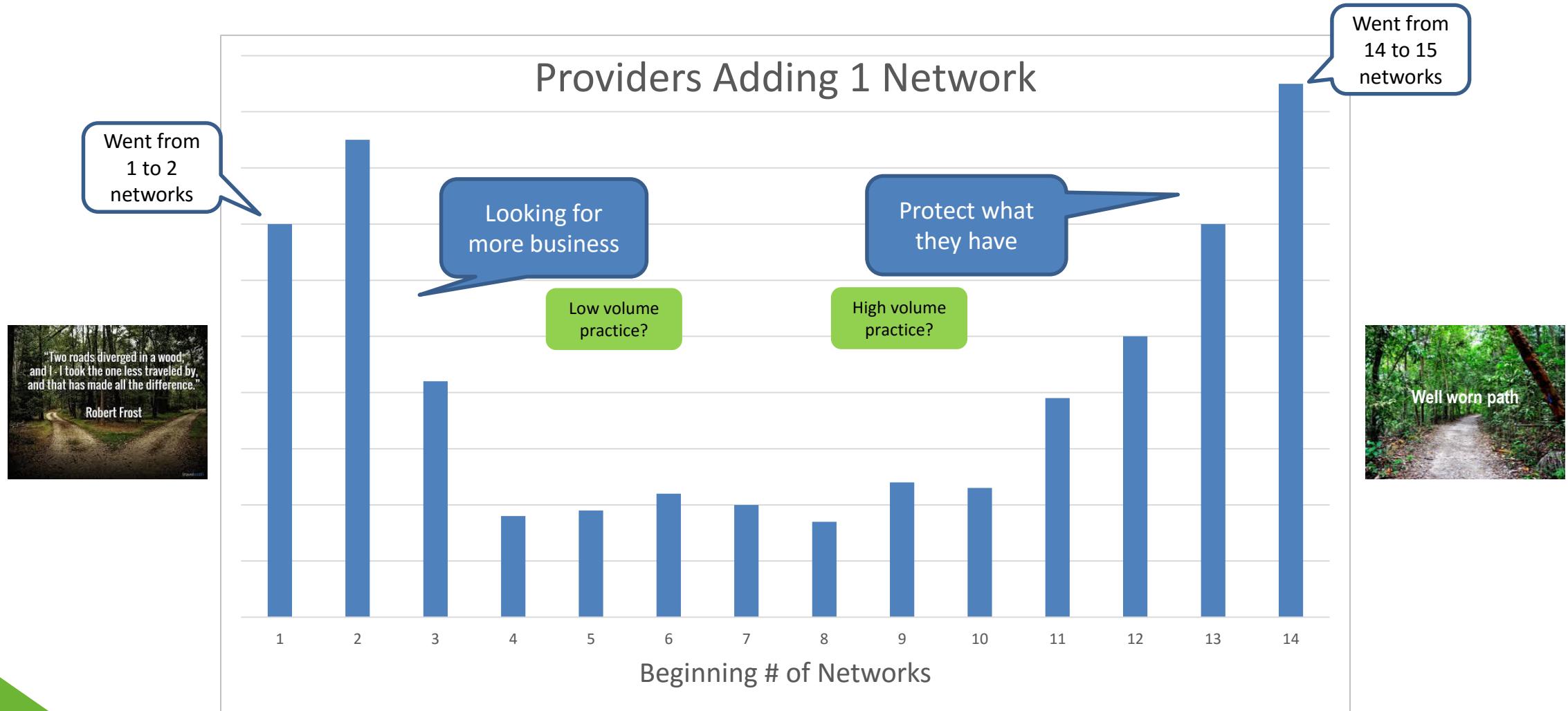
Road less traveled or well worn path?

Methodology

- Isolate providers who added 1 network
- Control for lease networks
- Identify their starting # of networks

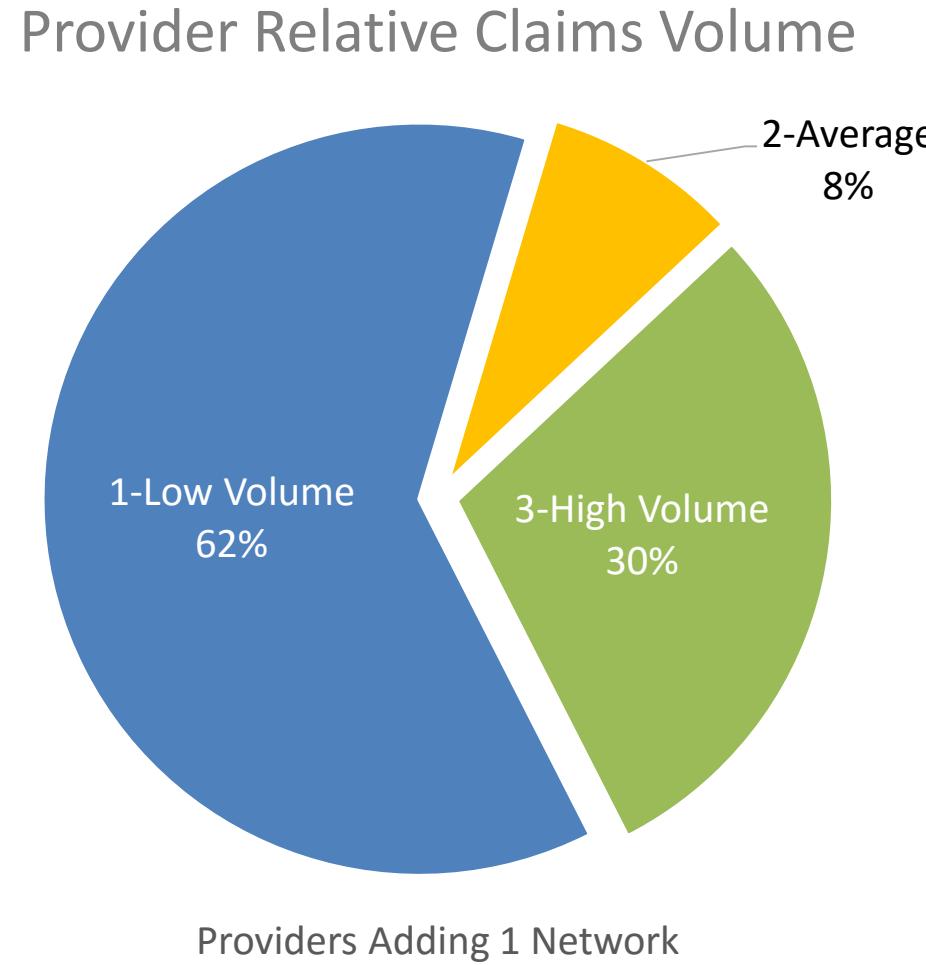


Characteristics of high potential recruitment prospects



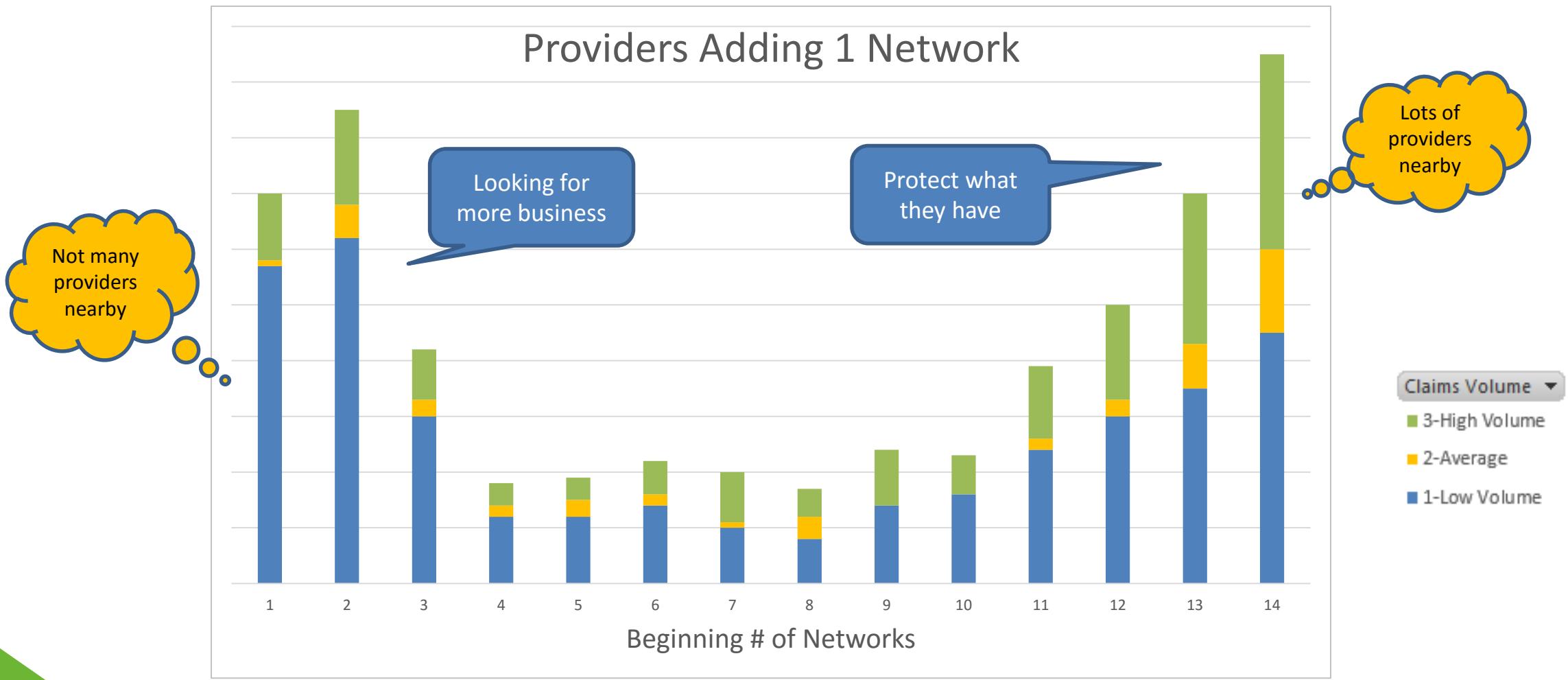
Source: NetMinder, March 2017

Characteristics of high potential recruitment prospects

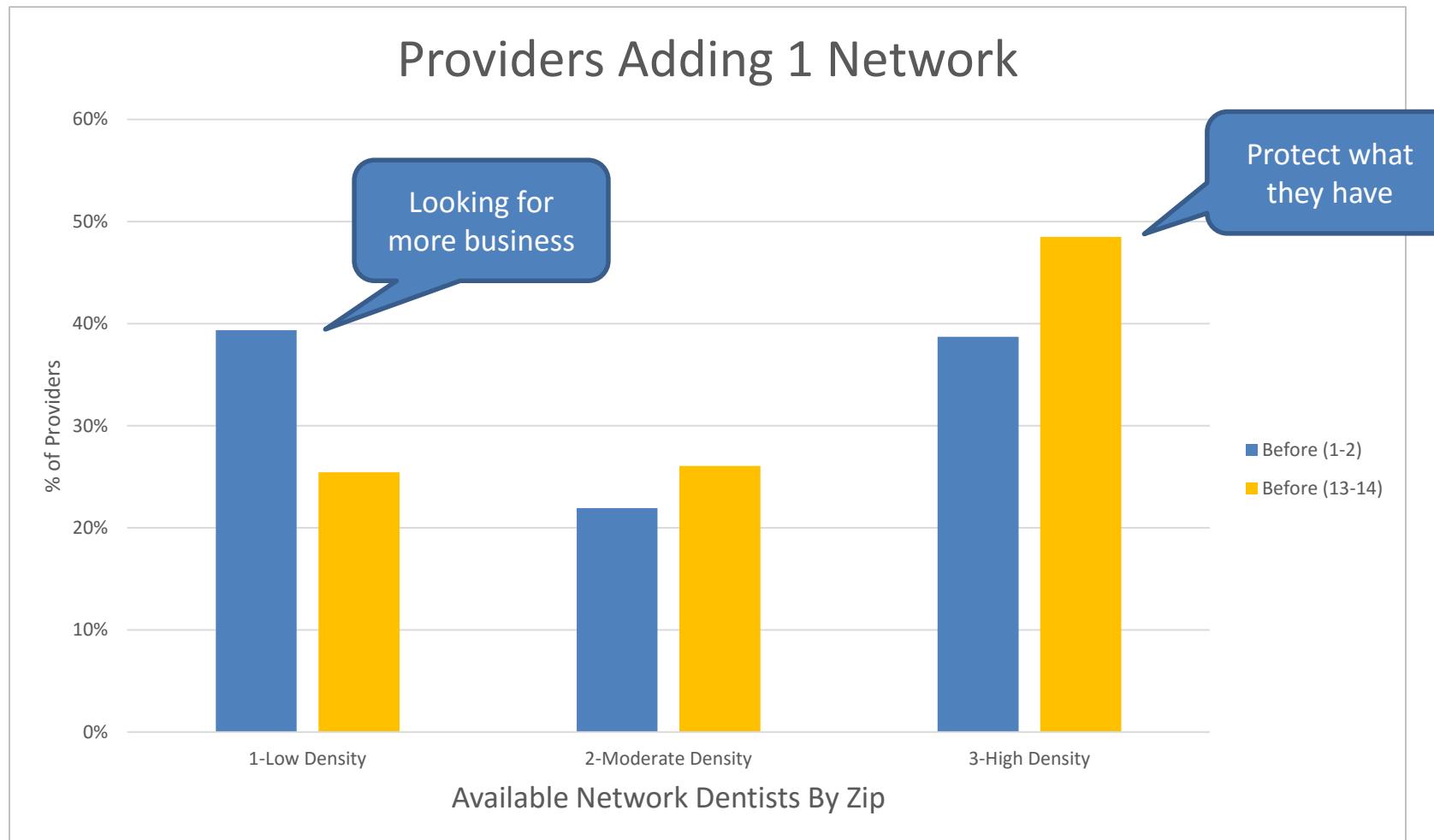


Source: NetMinder, March 2017

Characteristics of high potential recruitment prospects



Characteristics of high potential recruitment prospects



Summary

- PPO networks continue to grow
- Overlap continues to increase
 - Conscious effort to improve disruption profile
 - Leasing, swapping and stacking networks magnifies the effect
- Market saturation varies by state, but there's still room for growth
- Targeted recruitment strategies are growing in importance
 - Number of current networks
 - Volume of claims
 - Density of surrounding geo area

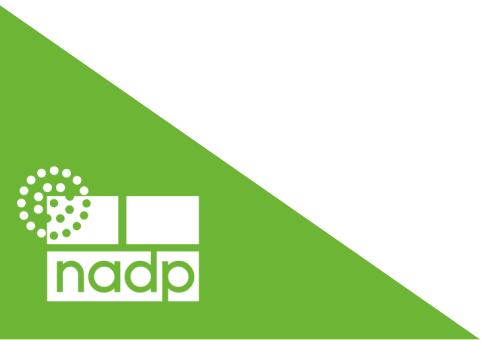


Questions?

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