Stronger Together: Shifting forward for member growth and sustainability
Member Growth & Sustainability

TOM

Trends

Opportunities

Maximization
(Shifting Forward)
Membership Trends & Trivia
Member Growth & Sustainability (All)

5 Year Market Trend

- Members
- Total Market
- Market Share

5 Year Market Trend
Active Licensed Dentists

- Members
- Total Market
- Market Share
12 Month Member Snapshot - National

- 03-MAR: 107,905 (2019), 107,263 (2020)
- 06-JUN: 122,229 (2019), 120,588 (2020)
- 08-AUG: 124,589 (2019), 125,620 (2020)
- 09-SEP: 126,901 (2019), 126,920 (2020)

Percentage Changes:
- 01-JAN: 5.0%
- 02-FEB: 2.0%
- 03-MAR: -0.6%
- 04-APR: -2.9%
- 05-MAY: -2.9%
- 06-JUN: -1.3%
- 07-JUL: -33%
- 08-AUG: -2.9%
- 09-SEP: -1.3%
- 10-OCT: -0.33%
12 Month Member Snapshot – All State Societies

- 4.3% increase in January
- 1.5% increase in February
- 1.1% decrease in March
- 3.4% decrease in April
- 3.4% decrease in May
- 1.8% decrease in June
- 3.2% decrease in July
- 1.8% decrease in August
- 1.5% decrease in September
- 1.5% decrease in October
- 1.5% decrease in November
- 1.8% decrease in December

2019 vs 2020
Member Growth & Sustainability

What do we do & who do we serve?

Help Dentists Succeed and Support the Advancement of the Health of the Public

ADA Membership by Generation

**SILENT GENERATION**
- Born: 1930-1945
- Age: 75 - 89 yr
- Members: 3,449
- Nonmembers: 994
- Total: 4,443
- 78% Market Share
- 22% Market Share

**BABY BOOMERS**
- Born: 1946-1964
- Age: 55 - 74 yr
- Members: 45,385
- Nonmembers: 26,170
- Total: 71,555
- 63% Market Share
- 37% Market Share

**GENERATION X**
- Born: 1965-1980
- Age: 40 - 54 yr
- Members: 38,349
- Nonmembers: 24,782
- Total: 63,131
- 61% Market Share
- 39% Market Share

**MILLENNIALS**
- Born: 1981-1994
- Age: 25 - 39 yr
- Members: 36,731
- Nonmembers: 17,477
- Total: 54,208
- 68% Market Share
- 32% Market Share

**GENERATION Z**
- Born: 1995-2012
- Age: 8 - 24 yr
- STU Mbrs: 22,844
- STU Nonmbrs: 1,704
- Total: 24,548
- 93% Market Share
- 7% Market Share

EOY 2019
Member Growth & Sustainability (New vs Established)

New & Established 5 Year Trend

<table>
<thead>
<tr>
<th>Member Market Share</th>
<th>Member Count</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Established Dentists</th>
<th>New Dentists</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/31/2016</td>
<td>60.9%</td>
<td>63.5%</td>
</tr>
<tr>
<td>08/31/2017</td>
<td>60.3%</td>
<td>62.9%</td>
</tr>
<tr>
<td>08/31/2018</td>
<td>59.8%</td>
<td>62.9%</td>
</tr>
<tr>
<td>08/31/2019</td>
<td>58.9%</td>
<td>61.9%</td>
</tr>
<tr>
<td>08/17/2020</td>
<td>57.2%</td>
<td>61.7%</td>
</tr>
</tbody>
</table>
Member Growth & Sustainability (Gender)

5 Year Trend by Gender

<table>
<thead>
<tr>
<th>Year</th>
<th>Female</th>
<th>Male</th>
<th>Unknown</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/31/2016</td>
<td>56.8%</td>
<td>63.3%</td>
<td>68.9%</td>
</tr>
<tr>
<td>08/31/2017</td>
<td>57.0%</td>
<td>62.8%</td>
<td>60.8%</td>
</tr>
<tr>
<td>08/31/2018</td>
<td>57.3%</td>
<td>62.4%</td>
<td>53.2%</td>
</tr>
<tr>
<td>08/31/2019</td>
<td>56.6%</td>
<td>61.5%</td>
<td>50.7%</td>
</tr>
<tr>
<td>08/17/2020</td>
<td>55.4%</td>
<td>59.8%</td>
<td>63.7%</td>
</tr>
</tbody>
</table>
Member Growth & Sustainability (Race)

5 Year Trend by Race

<table>
<thead>
<tr>
<th>Race</th>
<th>08/31/2016</th>
<th>08/31/2017</th>
<th>08/31/2018</th>
<th>08/31/2019</th>
<th>08/17/2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ethnically Diverse</td>
<td>48.7%</td>
<td>48.2%</td>
<td>48.5%</td>
<td>49.3%</td>
<td>49.6%</td>
</tr>
<tr>
<td>Unk/Not Reported</td>
<td>57.3%</td>
<td>57.4%</td>
<td>57.4%</td>
<td>55.0%</td>
<td>52.3%</td>
</tr>
<tr>
<td>White</td>
<td>67.9%</td>
<td>67.3%</td>
<td>66.7%</td>
<td>66.3%</td>
<td>65.4%</td>
</tr>
</tbody>
</table>
Acquisition, Revenue, Retention, Conversion
Member Growth & Sustainability (Acquisition)

Initial Demand
- Early career phenomena
- 1-7 years out from graduation
- Driven by dentists' path to practice

Reinstatement Demand
- Members who lapse for different reasons
- Early and mid career phenomena
- Driven by continued interest in organized dentistry
Member Growth & Sustainability (All Acquisition)

5 Year YTD New Acquisitions

- 08/31/2016: 3,585
- 08/31/2017: 3,313
- 08/31/2018: 3,835
- 08/31/2019: 3,467
- 08/31/2020: 3,884

Legend:
- Reinstated
- First Time Joiner
Member Growth & Sustainability (New vs. Established Acquisitions)
- 35 states saw member growth in 2019
- Member growth varies across full dues paying members and dues discount members
- Initial demand and reinstatement demand can help predict member growth opportunities

- Most states count dues revenue as a significant percentage of their overall revenue
- There is an imbalance between member growth & dues revenue gains
- Nondues revenue may not close the revenue gap
Member Growth & Sustainability (Revenue)

5 Year Payment Status Trend
Active Licensed Members

<table>
<thead>
<tr>
<th>Date</th>
<th>Paid Full Dues</th>
<th>Receiving Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/31/2016</td>
<td>70.5%</td>
<td>29.5%</td>
</tr>
<tr>
<td>08/31/2017</td>
<td>69.4%</td>
<td>30.6%</td>
</tr>
<tr>
<td>08/31/2018</td>
<td>68.7%</td>
<td>31.3%</td>
</tr>
<tr>
<td>08/31/2019</td>
<td>67.8%</td>
<td>32.2%</td>
</tr>
<tr>
<td>08/17/2020</td>
<td>65.8%</td>
<td>34.2%</td>
</tr>
</tbody>
</table>
What are we trying to accomplish? BALANCE

Member Growth

Financial Sustainability
Member Growth & Sustainability (Revenue)

Disconnect between membership growth and sustainable dues revenue in 73.6% (39) of dental societies. Only 26.4% (14) have both membership and revenue increasing.
Member Growth & Sustainability (Retention)

Retention Matters

- Easier to renew than to acquire
- Retention not created equal (loyalty)
- Attend the most events and workshops (revenue)
- Use the most product and services (revenue)
- Recommend a non-member (recruitment)

Retention Takeaways

- There is a second year out dental school phenomenon that impacts the entire membership system
- The first five years of the 10 year new dentists window are the most volatile
- New dentists who are members the first 5 years out are likely to remain members throughout their career
Member Growth & Sustainability (All Retention)

5 Year Retained & Nonrenew Trend
Active Licensed Dentists

- 08/31/2016: 7.3% Retained, 92.7% Non-Renew
- 08/31/2017: 7.8% Retained, 92.2% Non-Renew
- 08/31/2018: 7.6% Retained, 92.4% Non-Renew
- 08/31/2019: 9.1% Retained, 90.9% Non-Renew
- 08/17/2020: 10.3% Retained, 89.7% Non-Renew
Member Growth & Sustainability (All Retention)

Active Non-Renews By Year

ADA Membership History 2001-2019
Member Growth & Sustainability (Conversion)

Dental School & 1\textsuperscript{st} & 2\textsuperscript{nd} Year Out

- Enrollment is at its highest since the late 1970s-early 1980s. The diversity of the profession continues to grow year after year
- As the demographics of dentistry continue to change the diversity and membership gap could widen
- Dental School Strategy partnership across states is essential

- The intent of Provisionals
- There is a second year out of dental school phenomenon that impacts the entire membership system
- Non-membership is highly resistant to change.
Member Growth & Sustainability (Student to New Dentist Conversion)

5 Year Conversion Rate of Previous Dental School Class

<table>
<thead>
<tr>
<th>Year</th>
<th>Conversion Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>60.2%</td>
</tr>
<tr>
<td>2016</td>
<td>60.6%</td>
</tr>
<tr>
<td>2017</td>
<td>65.0%</td>
</tr>
<tr>
<td>2018/08</td>
<td>61.5%</td>
</tr>
<tr>
<td>2019/08</td>
<td>82.2%</td>
</tr>
</tbody>
</table>

Class: Year and Month
**Member Growth & Sustainability (Student to New Dentist Conversion)**

| Class | 1st | %   | 2nd | %   | 3rd | %   | 4th | %   | 5th | %   | 6th | %   | 7th | %   | 8th | %   | 9th | %   |
|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 2010  | 3,045 | 70.1% | 2,960 | 63.4% | 2,971 | 61.2% | 2,860 | 59.4% | 2,834 | 57.3% | 2,773 | 57.3% | 2,716 | 57.3% | 2,757 | 56.1% | 2,729 | 55.6% |
| 2011  | 3,191 | 72.0% | 3,038 | 64.0% | 2,821 | 59.2% | 2,830 | 57.2% | 2,727 | 56.4% | 2,635 | 55.6% | 2,746 | 55.5% | 2,682 | 54.4% |       |     |
| 2012  | 3,336 | 74.2% | 3,001 | 63.9% | 2,987 | 59.9% | 2,889 | 58.4% | 2,787 | 57.0% | 2,870 | 56.4% | 2,811 | 55.2% |       |     |
| 2013  | 3,322 | 74.5% | 3,060 | 61.3% | 2,903 | 58.0% | 2,803 | 56.5% | 2,862 | 55.3% | 2,806 | 54.0% |       |     |
| 2014  | 3,431 | 71.8% | 3,144 | 61.7% | 2,991 | 57.7% | 3,085 | 57.9% | 2,940 | 54.8% |       |     |
| 2015  | 5,362 | 92.5% | 3,302 | 61.6% | 3,294 | 58.7% | 3,219 | 56.7% |       |     |
| 2016  | 5,412 | 92.7% | 3,801 | 67.7% | 3,410 | 59.6% |       |     |
| 2017  | 5,654 | 92.9% | 3,864 | 65.0% |       |     |
| 2018  | 6,164 | 97.0% |       |     |
Membership Opportunities
Member Growth & Sustainability (Decision Matrix)

Growth Opportunity Leverages 4 Key Criteria & 4 Key Steps

4 Key Criteria
- Readily Identifiable
- Volume
- Value
- Growth Correlation

4 Key Steps
1. Identify important factors
2. Rank/weight factors
3. Evaluate target markets options against factors
4. Score each option based on each factor
The New Dentist Impact

If ______________________market share is strong within a state, the states’ overall market share is likely strong.

83% of the possible variation in outcomes seen in state market share can be predicted as a factor of__________________;
a very strong correlation.
Early career member growth

Growth of Early Career (1 to 5 Years) ADA Membership and Early Career Dentists (2001 to 2019)
The female target market

Growth of the Total Active Dentist Market and Total Active ADA Membership Compared to Female Dentist and Female Membership Growth (2001 to 2019)
The diversity target market

Growth of the Total Active Dentist Market and Total Active ADA Membership Compared to Diverse Dentist and Diverse Membership Growth (2001 to 2019)

ADA Membership History 2001-2019
Maximization
Shifting Forward
Member Growth & Sustainability

Shift Drivers

Association
↓
Membership
↓
ADA/Tripartite Shift

Business Competencies
↓
Capacity
↓
Agile Capacity

Competition
↓
Member Value
↓
Focused Effort & Effective Communications

Socialization
↓
New Normal Networking
↓
Grassroots Engagement & Community

Consumer Expectations
↓
Member Experience
↓
Digital Transformation

Volunteering
↓
Leadership & Governance
↓
Effective Governance (including Leadership Diversity)

Workforce Diversity
↓
Baby Boomer Impact
↓
Balanced New Dentist & Established Dentist Efforts

Equity
↓
Diversity
↓
Inclusion

COVID-19
↓
Economic Constraints
↓
Balanced Revenue Efforts
Member Growth & Sustainability

**TOP 15**

1. Valuable Content
2. Effective Communication
3. Inclusion
4. Non-Dues Revenue
5. Embrace Change
6. Leadership Diversity
7. Grassroots Engagement
8. Move Quickly
9. Eliminate Duplication of Tripartite Effort
10. Easy Joining & Engagement
11. Evaluate Geographic Barriers
12. Improve Variation Across States
13. Be Relevant (New Dentist)
14. Streamline Governance
15. Leverage Technology (Digital Transformation)
The Business Case for Dental Society Capacity Building

Organizational Goal

All levels of the ADA will have sufficient organizational capacity necessary to achieve the goals of the strategic plan.

Tripartite (national, state and local) membership collectively accounts for 96.8% of our total membership while direct (national only) membership encompasses 3.2% of our total membership.

Helping dental societies succeed is central to the ADA’s overall success.
Capacity Support & Variation Across States

Balanced Standardization & Customization

- 6% (3) XXL (Over 7500 Active Members)
- 11% (6) XL (3501-7500 Active Members)
- 21% (11) L (2001-3500 Active Members)
- 21% (11) M (1001-2000 Active Members)
- 23% (12) S (501-1000 Active Members)
- 19% (10) XS (Under 500 Active Members)
Measuring Performance & ROI

Net Membership (Variance)
Active Licensed Dentists for All State Societies

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</tr>
</thead>
<tbody>
<tr>
<td>Variance</td>
<td>-99</td>
<td>109</td>
<td>306</td>
<td>-667</td>
<td>-295</td>
<td>-108</td>
<td>-270</td>
<td>1,832</td>
<td>1,415</td>
<td></td>
</tr>
</tbody>
</table>
Member Growth & Sustainability

Best immediate path to closing the 2020 membership gap

Best intermediate path to member growth & sustainability as we move into 2021 & 2022?

Over the course of our strategic plans what’s our biggest opportunity to meet goals and objectives

Best path forward as we look towards long-term organizational growth & sustainability
2020 ADA Annual Membership Awards Ceremony
Dr. Jay Freedman
Chair, Council on Membership
Pennsylvania
Dr. Jeff Kahl
Vice Chair, Council on Membership
Colorado
National Signing Day!

Class of 2019

80% or greater of applications signed
National Signing Day

- California: Loma Linda University, School of Dentistry
- California: University of California at Los Angeles School of Dentistry
- California: University of California at San Francisco School of Dentistry
- California: University of the Pacific Arthur A. Dugoni School of Dentistry
- California: Western University of Health Sciences College of Dental Medicine
- DC: Howard University
- Florida: University of Florida, College of Dentistry
- Florida / Pennsylvania: Lake Erie College of Osteopathic Medicine School of Dental Medicine
National Signing Day

- Illinois: Midwestern University College of Dental Medicine – Illinois
- Illinois: Southern Illinois University School of Dental Medicine
- Illinois: University of Illinois at Chicago College of Dentistry
- Indiana: Indiana University School of Dentistry
- Louisiana: Louisiana State University Health Sciences Center School of Dentistry
- Michigan: University of Michigan School of Dentistry
- Missouri: University of Missouri-Kansas City School of Dentistry
- Mississippi: University of Mississippi Medical Center School of Dentistry
- North Carolina: University of North Carolina at Chapel Hill Adams School of Dentistry
- North Carolina: East Carolina University School of Dental Medicine
National Signing Day

- Nebraska: University of Nebraska Medical Center College of Dentistry
- New Jersey: Rutgers School of Dental Medicine
- Nevada: University of Nevada Las Vegas School of Dental Medicine
- New York: Stony Brook University School of Dental Medicine
- Ohio: Case Western Reserve University School of Dental Medicine
- Ohio: The Ohio State University College of Dentistry
- Oklahoma: The University of Oklahoma College of Dentistry
- Oregon: Oregon Health & Science University School of Dentistry
- Florida / Pennsylvania: Lake Erie College of Osteopathic Medicine School of Dental Medicine
National Signing Day

- Puerto Rico: University of Puerto Rico School of Dental Medicine
- Texas: Texas A&M University College of Dentistry
- Texas: The University of Texas Health Science Center at Houston School of Dentistry
- Utah: Roseman University of Health Sciences College of Dental Medicine
- Utah: University of Utah School of Dentistry
- Virginia: Virginia Commonwealth University School of Dentistry
- Wisconsin: Marquette University School of Dentistry
- West Virginia: West Virginia University School of Dentistry
New this year! Peer Recognition

IT TAKES A VILLAGE…
Peer Recognition – Local Dental Society

- Eastern District Dental Society (Georgia)
- Isaac Knapp District Dental Society (Indiana)
- Greater Manchester Dental Society (New Hampshire)
- San Antonio District Dental Society (Texas)
- Second District Dental Society (Tennessee)
- Snohomish County Dental Society (Washington)
- Wichita District Dental Society (Kansas)
Peer Recognition – Local Dental Society

Executive Director

• Barb Kolling (Washtenaw District, Michigan)
• Carolyn Hanson (Indianapolis District, Indiana)
• Deborah Elam (San Francisco District, California)
• Diane Landers (Second District, Tennessee)
• Jamee Lock (Isaac Knapp District, Indiana)
• Jessica Lucas (Wichita District, Kansas)
• Judy Bangs (Snohomish District, Washington)
• Marlinda Fulton (Central District, Florida)
• Nancy Nisbett (Capital Area, Texas)
Peer Recognition – State Dental Society

- Arkansas State Dental Association
- California Dental Association
- Colorado Dental Association
- Florida Dental Association
- Georgia Dental Association
- Indiana Dental Association
- Michigan Dental Association

- Missouri Dental Association
- New Hampshire Dental Society
- Ohio Dental Association
- Tennessee Dental Association
- Texas Dental Association
- Washington State Dental Association
- Wisconsin Dental Association
Peer Recognition – State Dental Society Executive Director

- Bracken Kilpack (Washington)
- Conor McNulty (Oregon/Massachusetts)
- Drew Eason (Florida)
- Greg Hill (Colorado)
- Jay Dziwlik (Indiana)
- Karen Burgess (Michigan)
- Linda Brady (Texas)
- Mike Auerbach (New Hampshire)
- Vicki Wilbers (Missouri)
Peer Recognition – State Dental Society Staff Member

- Amy Williams (Tennessee)
- Brittany Hall (Tennessee)
- Dave Marsh (Illinois)
- Debbie Rogers (Texas)
- Duncan Jennings (North Carolina)
- Erica Carvin (Colorado)

- Jean Strainer (Montana)
- Jeremy Tuber (Arizona)
- Jody Cleary (Indiana)
- Lisa Ward (North Carolina)
- Phyllis Yancy (Arizona Dental Society)
- Stacey Hemmel (Missouri)

Local Society:
- Shannon Star (San Antonio District Dental Society, Texas)
Membership Awards
Categories by Membership Size

- More the 7,500 Members
- 3,501-7,500 Members
- 2,001-3,500 Members
- 1,001-2,000 Members
- 501-1,000 Members
- Fewer than 500 Members
Converted the Highest Percentage of Non-Members to Membership
Converted the Highest Percentage of Non-Members to Membership

- Over 7500 Active Licensed Members: Texas Dental Association
- 3501 – 7500 Active Licensed Members: Florida Dental Association
- 2001 – 3500 Active Licensed Members: Arizona Dental Association
- 1001 – 2000 Active Licensed Members: Maryland State Dental Association
- 501 – 1000 Active Licensed Members: Nevada Dental Association
- Under 500 Active Licensed Members: District of Columbia Dental Society
Most Improved Active Member Retention Rate
Most Improved Active Member Retention Rate

- Over 7500 Active Licensed Members: California Dental Association
- 3501 – 7500 Active Licensed Members: New Jersey Dental Association
- 2001 – 3500 Active Licensed Members: Arizona Dental Association
- 1001 – 2000 Active Licensed Members: Oregon Dental Association
- 501 – 1000 Active Licensed Members: West Virginia Dental Association
- Under 500 Active Licensed Members: District of Columbia Dental Society
Greatest Net Gain of New Dentists
Greatest Net Gain of New Dentists

- Over 7500 Active Licensed Members: New York State Dental Association
- 3501 – 7500 Active Licensed Members: Massachusetts Dental Society
- 2001 – 3500 Active Licensed Members: North Carolina Dental Society
- 1001 – 2000 Active Licensed Members: Kentucky Dental Association
- 501 – 1000 Active Licensed Members: West Virginia Dental Association
- Under 500 Active Licensed Members: Rhode Island Dental Association
Greatest Net Gain in Membership
Greatest Net Gain in Membership

- Over 7500 Active Licensed Members: New York State Dental Association
- 3501 – 7500 Active Licensed Members: Florida Dental Association
- 2001 - 3500 Active Licensed Members: Colorado Dental Association
- 1001 – 2000 Active Licensed Members: Kentucky Dental Association
- 501 – 1000 Active Licensed Members: West Virginia Dental Association
- Under 500 Active Licensed Members: District of Columbia Dental Society
Greatest Percentage of Fourth Year Reduced Dues Payers to Full Dues Membership
Greatest Percentage of Fourth Year Reduced Dues Payers to Full Dues Membership

• Over 7500 Active Licensed Members: Texas Dental Association
• 3501 – 7500 Active Licensed Members: Florida Dental Association
• 2001 – 3500 Active Licensed Members: Arizona Dental Association
• 1001 – 2000 Active Licensed Members: Maryland State Dental Association
• 501 – 1000 Active Licensed Members: Nevada Dental Association
• Under 500 Active Licensed Members: District of Columbia Dental Society
Converted Highest Number of Diverse Dentists to Membership
Converted Highest Number of Diverse Dentists to Membership

- Over 7500 Active Licensed Members: Texas Dental Association
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- 2001 – 3500 Active Licensed Members: Georgia Dental Association
- 1001 – 2000 Active Licensed Members: Maryland Dental Association
- 501 – 1000 Active Licensed Members: Nevada Dental Association
- Under 500 Active Licensed Members: District of Columbia Dental Society
Converted Highest Number of Nonmember Women Dentists to Membership
Converted Highest Number of Nonmember Women Dentists to Membership

• Over 7500 Active Licensed Members: Texas Dental Association

• 3501 – 7500 Active Licensed Members: Florida Dental Association

• 2001 – 3500 Active Licensed Members: Georgia Dental Association

• 1001 – 2000 Active Licensed Members: Maryland State Dental Association

• 501 – 1000 Active Licensed Members: Nevada Dental Association

• Under 500 Active Licensed Members: District of Columbia Dental Society
CONGRATULATIONS!
Upcoming Webinar: Keynote Speaker

A Problem Identified is an Opportunity
Wednesday, August 26, 5:30 pm – 7:00 pm CT

ADA.org/ConferenceWeek