

KEY-STONE MULTICLIENT INFORMATION ASSETS

2026



KEY-STONE, AT A GLANCE

30 years

Key-Stone is an international market research and strategic consulting company founded in Turin in 1996. With more than 40 employees we are a point of reference for the industry of the covered markets.

+40 talents

Highly specialized in market research and data analysis, with deep expertise in the international industry market, for a consultative insightful interpretation

+100 partners

We can rely on a close trust-based relationship with numerous leading partners in the dental and health care & beauty market, as well as collaborations with major industry publications

360° vision

We periodically interview all stakeholders of interest: professionals (dentists, hygienists, dental technicians, hairdressers, estheticians, etc.), patients/clients, Key Opinion Leaders, scientific societies and institutions

84 countries

We collect and meticulously reprocess sales data from hundreds of companies, ensuring comprehensive and detailed business coverage at a global level in every geographical region (APAC, EMEA, Americas)

7 BN/USD

The value of the data panel collected on consumables and equipment has made us the key supplier, internationally, to the main industries in the dental and beauty sectors. With a continuously evolving range of tracked products



UNIQUE IN THE DENTAL SECTOR

**QUALIFIED IN HEALTH &
BEAUTY**

MILESTONES

1996

● BUSINESS IDEA

- Marketing Projects & Services
- Customization and flexibility
- Multidisciplinary staff

2005

● KEY-STONE GROUP

- From strategic architecture to operational marketing
- Development in different sectors and internationalization
- Qualitative Research Department
- Integrated Marketing Communication

2009

● SPECIALISATION

- Strategic review
- Focus on specific market segments
- Marketing Research & Consulting

2015

VERTICALISATION

- Dental focus
- Development of unique and exclusive models
- Expansion into related fields
- Worldwide expansion

2024

● "YEAR ZERO"

- Offer differentiation by company and target/sectors
- Recruiting plan aimed to reach over 50 resources by 2026, in order to increase production capacity and advisory services
- Opening of new offices (Italy, France, Germany, Spain, US)

THE MANIFESTO

KNOWLEDGE

The ability to analyze market data with absolute methodological accuracy and to handle them with great confidence, together with an in-depth knowledge of the sectors we serve, represents the cornerstone of our activity.

COMMITMENT

Commitment is the heart of our work. Our team manages each project with the utmost dedication to achieve the goals set and exceed our clients' expectations. We are flexible and ready to adapt to our customers' needs, offering customized solutions and building long-term relationships based on trust and quality. This is our constant commitment to ensure long-term success for our clients and our team.

PEOPLE

Each individual is unique to us and at the very heart of our work. There is no personal advantage, but rather an advantage gained and shared by the entire team along the path of our company's growth. The strong orientation towards communication and interpersonal relations - the 'know how' of our job - enables us to interact synergistically with our customers and partners.

TRUST

Our consolidated independence from players of their respective industries and our absolute confidentiality in dealing with data management make us the true reference point for our customers.

WORLDWIDE

International team, global expertise combined with specific country knowledge allow us to guide companies and organisations to anticipate trends and challenges affecting their respective sectors.

MARKET RESEARCH

We select the most suitable tool to meet your needs. We can draw from **proprietary databases and multiclient surveys** and eventually integrate them with the results of **ad hoc surveys tailored to specific business questions**, in order to provide **comprehensive and in-depth insights on the market and target audience** (professionals and end clients/patients).

UNDERSTAND THE MARKET

- Market measurement: market values and volumes by brand, market share, penetration, distribution performance, average price analysis, etc.
- Market values and trends analysis managing several industry panels in various segments and markets
- Scenario analysis: phenomena, trends, and potential threats and opportunities
- Competition analysis
- Category management analysis
- Development of forecasting models

KNOW THE TARGET

- Quantitative attributes: sociodemographic, purchase behavior, usage and attitudes, customer journey, etc.
- Qualitative/soft characteristics: latent needs, aspirations and desiderata, symbolic and value universe
- Touch points: attitudes toward communication both in terms of tone of voice (language and expressions) and exposure (preferred channels)
- Segmentation of the target audience

MEASURE AND OPTIMIZE THE BRAND PERFORMANCE

- Brand Awareness
- Brand positioning
- Brand image
- Customer experience and customer satisfaction investigation

MARKETING AND COMMUNICATION STRATEGIES' OPTIMISATION

- Concept test
- Pack test
- Pricing test
- Pre & Post Communication test

SOME COMPANIES WE COOPERATE WITH



ASSOCIATIONS



UNDERSTAND THE MARKET

PANEL BASED ANALYSIS

SELL-OUT ANALYSIS

The one and only analysis of the market value at sell-out for consumables and small equipment

PANEL DATA ONLY

Investigated topics and KPIs

- Quantitative analysis carried out through the **processing of data provided by the companies participating in the dedicated panel**, integrated with proprietary Key-Stone data and estimates
- Through **sell-out** data (values and volumes of products sold to dentists and laboratories), **it is possible to gain market insights** such as overall growth trends, growth trends by product family and brand, market shares, average selling prices, and more
- Subscribers **receive periodic reports** useful for **understanding market sales development** and its **variations** over time
- The data shared with Key-Stone is protected by the **principle of confidentiality** through agreements signed with each panel member, as well as by the professionals who process the data in question

The investigation

- **Data source:** local panel of distributors and manufacturers
- **Methodology:** quantitative analysis
- **Sample:** aggregation of sell-out data, integrated with sell-in data and estimates
- **Timing:** semi-annual report
- **Output:** data provided in Excel and PowerPoint formats
- **Investigation complexity:** three levels of product detail: product family, subfamily, and product group (e.g., Restorative - Composites - Universal composites)
- **Pricing:** on request and modular (complete report or individual product groups) by country
- **Geoscope:** Italy, Poland, Portugal, Spain, UK, Brazil
- **Future developments:** enlargement of tracked countries (BeNeLux, Germany)
- **Data-collection** value (2024): 1 billion

Analyzed product families

- | | |
|--------------------------|---------------------------|
| ▪ Impression mat. | ▪ Hand instruments |
| ▪ Restorative | ▪ Prophylaxis |
| ▪ Anaesthesia | ▪ Dynamic instrumentation |
| ▪ Luting cements | ▪ Small equipment |
| ▪ Temporization | ▪ CAD-CAM materials |
| ▪ Endodontics | ▪ Teeth |
| ▪ Bleaching | ▪ Crown & bridge |
| ▪ Sutures & Surgery | ▪ Porcelains |
| ▪ Disposables & PPE | ▪ Other lab materials |
| ▪ Abrasives & burs | |
| ▪ Hygiene & disinfection | |

FLASH TREND ANALYSIS

The one and only analysis of sell-out sales for specific product segments

PANEL DATA ONLY

Investigated topics and KPIs

- Quantitative analysis carried out through **the processing of data provided by companies participating in the Key-Stone panel**
- The research promptly tracks **sales trends to end consumers** (dentists and laboratories) for specific product categories. Presented figures are referring to the panel only
- Subscribers has the opportunity of receiving **reports** either **monthly or quarterly** (depending on the product type), useful for constantly monitoring the market status and its variations throughout different periods
- The data shared with Key-Stone is protected by the **principle of confidentiality** through agreements signed with each panel member, as well as by the professionals who process the data in question

The investigation

- **Data source:** local panel of distributors and manufacturers
- **Methodology:** quantitative analysis
- **Sample:** aggregation of sell-out data, integrated with sell-in data
- **Timing:** monthly or quarterly reports
- **Output:** data provided in Excel and PowerPoint formats
- **Investigation complexity:** specialized reports on specific product families
- **Pricing:** on request for each products' family
- **Geoscope:** France, Italy, Portugal, Spain
- **Future developments:** enlargement of tracked countries
- **Data-collection** value (2024): 1,2 billion

Analyzed product segments

- DENTAL MARKET
- Implantology
 - Biomaterials
 - CAD-CAM custom works
 - Orthodontics
 - Intra-oral scanners
 - Milling units
 - Dental Chairs
 - Autoclaves
 - 3D cone-beam panoramics
 - Clinical & Technical consumables
 - Professional aesthetic products
- OTHER MARKETS
- Professional hairdresser products

FAST TRACK

The one and only global analysis of sell-in sales data

PANEL DATA ONLY

Investigated topics and KPIs

- Quantitative analysis carried out through the **processing of data provided by a highly representative panel of global manufacturers**
- The research **promptly tracks sales trends** by **manufacturers to distributors (sell-in)**. Presented figures are referring to the panel only
- Through the collected data, the subscribers can monitor the business development (per country and globally) to **track performance both from a product category and geographic perspective**

The investigation

- **Data Source:** international panel of multinational manufacturers
- **Methodology:** quantitative analysis
- **Timing:** quarterly/semi-annual/annual reports
- **Output:** data provided in Excel format
- **Investigation Complexity:** two-level Key-Stone proprietary product classification
- **Pricing:** on request - report only available to participating companies
- **Geoscope:** Europe, Middle East and Africa, Asia Pacific, Latin America, North America (84 countries in total)
- **Future developments:** enlargement of tracked product families
- **Data-collection** value (2024): 5 billion

Analyzed product segments

RESTO-PREVENTION

- Impression mat.
- Restorative
- Luting cements
- Temporization
- Bleaching
- Prophylaxis
- CAD-CAM blocks

LABORATORY

- Teeth
- CAD-CAM disks
- Crown & bridge
- Porcelains
- Resins

ENDODONTICS

- Equipment
- Consumables

UNDERSTAND THE MARKET

DENTAL MARKET OVERVIEW

DENTAL MARKET OVERVIEWS

A fact-based, comparable framework to understand how European dental markets really work — and where to invest next

Investigated topics and KPIs

- In a highly fragmented and evolving global context, **strategic decisions require a structured and comparable understanding of how dental markets differ across countries**. Dental markets are shaped by **economic, cultural and social drivers** that influence access to care, patient expectations, professional behavior and business models.
- **Key-Stone Dental Market Overviews provide a decision-oriented reading of dental markets**, covering both **supply and demand** dynamics, **and explaining why** markets evolve differently despite similar product portfolios.
- **Key areas covered** include:
 - ✓ market structure and maturity
 - ✓ demand drivers and patient behavior
 - ✓ corporate dentistry and care models
 - ✓ distribution systems and supply chains
 - ✓ macroeconomic and regulatory context

The investigation

- **Sources:** integrated use of Key-Stone proprietary quantitative and qualitative research, combined with validated secondary sources (institutional, scientific, market data).
- **Methodology:** cross-country analytical framework designed to ensure consistency, comparability and interpretability across markets.
- **Geoscope and Timing:**
 - ✓ **EUROPE DENTAL MARKET OVERVIEW** (*DACH area, BeNeLux, France, Italy, Nordic countries, Spain, Poland, Romania, and the UK*) - October 2025
 - ✓ **IN-DEPTH COUNTRY ANALYSIS** *Italy/Spain/France* - April/July/June 2025
 - ✓ **Additional European markets** available upon request
 - ✓ **Output:** strategic report with executive insights and decision-oriented interpretation, supported by a senior Key-Stone consultant workshop.

Reasons to join

- A **shared reference framework to interpret national dental markets** in a consistent way, **enabling meaningful comparisons across countries**.
- The ability to benchmark market maturity, structural drivers and business models, **supporting decisions on prioritization, investment and go-to-market strategies**.
- A tool not only to interpret the present, but to **anticipate structural shifts, emerging needs and future development scenarios**.
- **Strategic consultancy** value, leveraging Key-Stone's long-term expertise in the dental sector across multiple geographies.
- **Scalability:** the framework can be extended to additional countries based on subscribers' needs (*LATAM and APAC under evaluation*).

DENTAL DISTRIBUTION INTELLIGENCE EUROPE

Understanding how dental distribution really works across Europe

Investigated topics and KPIs

- The **distribution channel** represents an **indispensable structural layer of the dental value chain**, operating within highly fragmented markets and at the intersection of major structural transformations affecting the sector.
- The study provides an **in-depth, comparable reading of European dental distribution**, focusing on:
 - ✓ distribution models and channel structures
 - ✓ purchasing dynamics and decision logics
 - ✓ competitive landscape and key players
- Particular attention is given to **structural drivers shaping market configuration**, including:
 - ✓ market **concentration and M&A** dynamics
 - ✓ the role of **international and multi-country dealer groups**
 - ✓ **top-ranking dealers and country-level distribution facts** to assess how structural changes are reshaping competitive intensity and future market configurations.

The investigation

- **Sources:** Integrated use of quantitative and qualitative research, including: Key-Stone proprietary surveys, in-depth interviews with international managers of leading dental manufacturers and distributors, selected secondary sources (institutional, scientific, industry bodies e.g. ADDE-FIDE).
- **Methodology:** structured and integrated analysis designed to ensure cross-country comparability and consistency.
- **Geoscope: Europe** (DACH Area - Southern Europe - France & Benelux – UK & Ireland – Nordics - Poland, Baltics & Russian Region).
- **Timing:** Updated edition released on a regular basis; latest version with data updated to **October 2025**.
- **Output:** comprehensive PDF report with key findings and strategic interpretation. Presentation workshop conducted by a senior Key-Stone researcher.

Reasons to join

- Provides a **fact-based and comparable framework** to support business intelligence, strategic screening and market prioritization across heterogeneous European markets.
- Enables a **correct interpretation of similarities and differences across countries**, reducing the risk of misleading comparisons based on surface-level indicators.
- Integrates **all relevant distribution data into a single, coherent analytical framework**, interpreted through the long-standing expertise of Key-Stone researchers.
- Designed as a **robust starting point** for:
 - ✓ European go-to-market strategy definition
 - ✓ investment and market-entry prioritization
 - ✓ alignment between HQ and local teams
- **Scalable to additional countries**, depending on the number of subscribers.

CORPORATE DENTISTRY INTELLIGENCE REPORT

A strategic decision support tool for operators, investors, and suppliers: map value creation, value capture, and the winning moves to make now

Investigated topics and KPIs

- The **DSO business model is rapidly developing world-wide and has become a structural component of the dental market**. In the main European countries, DSOs are now an entrenched phenomenon, with a market share of around 10%-15%. In all countries, the phenomenon of dental practice concentration, the growing interest of investment funds and the demand for accessibility will facilitate the development of DSOs in the medium to long term.
- This Key-Stone report aims to deliver **comprehensive market data together with qualitative and quantitative insights on the DSO industry***, its diverse stakeholders, and the leading companies operating within it, at a multicounty level.
- **Integrations available: Database** of the main DSO groups, number of clinics, and—where available—key contact information.

The investigation

- **Sources:** reprocessing of proprietary Key-Stone research data and elaboration of data derived from secondary sources (institutional, scientific, etc.); in-depth interviews with privileged observers (DSO executives, manufacturers, dealers, and investment funds); Quantitative survey on a representative sample of population in core DSO markets, designed to assess demand-side perceptions.
- **Methodology:** integrated analysis.
- **Geoscope: European countries/areas:** (BeNeLux, Denmark, France, Germany, Italy, Nordics, Poland, Romania, Spain, Switzerland, UK) and, since 2025 edition, **Middle East, Turkey and USA (new!)**.
- **Timing:** the analysis is carried every two years. Back-data for Europe 2023 available. New full edition released in **November 2025**.
- **Output:** comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher.

Reasons to join

- Key-Stone integrated report (desk analysis complemented by interviews with Key Opinion Leaders in the industry and patients' interviews), will **clarify the role of DSO and support strategic decisions on risks and opportunities** that this rapidly growing channel may represent for the stakeholders (manufacturers, dealers, patients, traditional dentists, and investors), and **provide guidance for the commercial, marketing, and communication strategies** of the players in this market.
- It **combines all relevant data and information on DSO into a comprehensive and integrated report**, analyzed and **interpreted through the decades of expertise of Key-Stone researchers** in this field.
- **Scalable to other countries** (depending on the number of subscribers).

**Key-Stone classifies DSOs as entities with a minimum of four operational clinics, constantly monitoring even those with fewer locations. This edition will take in account as well Independent Dentists' Networks.*

EUROPE DENTAL LABS MARKET OVERVIEW

A comprehensive scenario of Dental Laboratories in Europe

Investigated topics and KPIs

The analysis provides information on the state of the art of dental laboratories, market dynamics, and possible future scenarios in the countries under investigation. With a focus on:

- the **dental laboratory market and evolving trends** (number of operators, market value)
- **distribution channels** (main players, trends, organization, etc.)
- the **segmentation criteria** in the dental laboratory market, the weight of each segment and potential areas for development
- **key success factors and challenges** in the orthodontic and digital laboratory market
- the **marketing mix of orthodontic and digital suppliers** in the laboratory market and the most relevant features of the different value propositions.
- the most used **communication** and distribution **strategies**.

The investigation

- **Sources:** data and analyses from Key-Stone surveys, other secondary sources (institutional, scientific, etc.), and in-depth interviews with Key Opinion Leaders of the dental industry.
- **Methodology:** integrated analysis.
- **Geoscope: EU 5** (France, Germany, Italy, Spain, and the UK).
- **Timing:** Back-data for EU5 2021 available. *New edition 2025 under evaluation.*
- **Output:** comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher.

Reasons to join

- This report offers a periodical **comprehensive picture useful to assess the business potential for each country and fine tune the strategies related to the Dental Laboratories' target** in Europe.
- Key-Stone's deep and broad (in geographical terms) experience and **consultative approach can contribute to the Dental Companies' strategic thinking, and to translate it into concrete activities.**
- **Scalable to other countries** (depending on the number of subscribers)

UNDERSTAND THE MARKET

SECTOR STUDIES

IMPLANTOLOGY SCENARIO

An integrated report essential for navigating the implantology market

Investigated topics and KPIs

- The **implantology segment has always represented a market of great economic and strategic relevance** in the dentistry business (Brazil, Italy, Germany, Korea, Spain and USA the most important markets in the world in terms of fixture numbers). Is it a mature market or is there still potential to be exploited?
- Key-Stone's Implantology Scenario is an in-depth analysis of the dental implant market in the target countries, focusing on the **main components of supply and demand for implant treatments**, contextualized **within the macroeconomic and social environment**. The research helps to explain the underlying causes driving the **major trends in the dental implant sector** in the country under investigation.
- **The topics covered include:** business life cycle and trends, factors impacting the demand (sociodemographic, epidemiological, cultural, technological, etc.) and patient needs, Customer Segmentation, Brand image, Brand experience, Customer satisfaction, implantology market, measurement.

The investigation

- **Sources:** data and analyses from Key-Stone surveys, institutional and scientific sources, quantitative research, and in-depth interviews.
- **Methodology:** integrated qualitative-quantitative analysis.
- **Sample:**
 - ✓ In-depth individual interviews with **Key Opinion Leaders** in the implantology sector
 - ✓ Quantitative CAWI survey on **patients** (OmniSalus)
 - ✓ Quantitative CAWI survey on **implantology dentists**
- **Geoscope and Timing:** the analysis is carried approximately every two years. **2025** editions will be available: **Italy** (April 2025) **Spain (1Q 2026) & France (NEW, 1Q 2026)**.
- **Output:** comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher.

Reasons to join

- The **IMPLANTOLOGY SCENARIO** represents an important **strategic tool** for the subscribers, as it gathers, drawing from Key-Stone's proprietary sources, **not only market data but also** the viewpoint of **different stakeholders** (dentists, opinion leaders, patients).
- Analysing market trends, purchasing behaviour, manufacturers' positioning and competitors' Kpi's enables companies to **optimise their choices, improve patient service and position themselves distinctively** in a highly competitive environment.
- All the output (information, insights and data) are **enriched by the know-how of Key-Stone consultants**
- **Scalable to other countries** (depending on the number of subscribers)

ORTHODONTIC SCENARIO

A strategic decision-support report to understand the evolution of the orthodontic market

Investigated topics and KPIs

- The **orthodontic market** is not in decline but **undergoing a structural transformation**. **Growth is no longer homogeneous**: case mix is shifting, treatment duration is changing, and value per case is under increasing competitive pressure. **Aligners have become a competitive standard**, while **patient demand is evolving**, with the adult segment gaining relevance and expectations moving toward aesthetics, convenience and faster decision cycles. **The orthodontic business is becoming more segmented**: age mix, device mix, treatment duration, hybrid protocols and consultant dynamics are redefining the economic balance of practices. **Specialisation and practice organization are emerging as key performance levers**, with more structured models better managing complexity and competitive pressure.
- Key-Stone report delivers a **coherent, integrated reading of orthodontics**, linking **demand, offer and organisation** beyond fragmented views.

The investigation

- **Sources**: reprocessing of **proprietary** Key-Stone research data **and** elaboration of data derived from **secondary sources (institutional, scientific, etc.)**; **in-depth interviews with KOLs** from the clinical, academic and industry ecosystem; quantitative CAWI survey on **dentists** (GPs and orthodontists); quantitative **CAWI survey on patients**, including paediatric and adolescent focus (OmniSalus);
- **Methodology**: integrated analysis
- **Geoscope and Timing**: the analysis is carried approximately every two years. **2026** edition will be available for **Italy** and **Spain** (two distinct national reports, available separately) **in May**
- **Output**: comprehensive report with key findings and strategic comments in PDF, dedicated presentation workshop conducted by a senior Key-Stone researcher

Reasons to join

- To **understand how orthodontic value is being reshaped**, not just where volumes are growing
- To interpret **how aligners, brackets and hybrid protocols are reshaping case mix**, organisation and economic sustainability
- To move from partial views to a **single integrated framework** linking: demand, offer, organisation, pricing and future scenarios
- To understand the **shift from device-driven demand to more pragmatic, outcome-oriented patient behaviour**.
- To support **strategic decisions** on portfolio, positioning and go-to-market in a highly competitive market
- To access a **unique combination of data, interpretation and expertise**, built on decades of Key-Stone research in dental markets
- **Scalable to other countries** (depending on the number of subscribers)

ALIGNERS SCENARIO

An indispensable integrated report for navigating the orthodontic market

Investigated topics and KPIs

- The **aligner segment** is one of the most **dynamic and rapidly evolving** within modern orthodontics. Aligners are **no longer just an aesthetic solution: they are an integral part of an increasingly multidisciplinary treatment approach**, where dental alignment is planned in synergy with other treatments such as implantology, prosthetics, periodontology and oral surgery.
- Key-Stone's Aligners Scenario provides an update on the orthodontic aligners market, offering insights into the **main components of supply and demand** within the sector, contextualized **in the broader market environment**. The report aims to explain the **key drivers behind aligner's market trends**, focusing on the evolution of case numbers, revenue dynamics, and qualitative market scenarios.
- **The topics covered** include: market trends and projections, scenario overview, stakeholder perspectives, competitive developments, consumer behavior, offer and demand analysis, market rumor and acquisitions.

The investigation

- **Sources:**
 - ✓ data from KS quantitative research Desk and scenario analysis
 - ✓ Interviews with KOLs from academia and management of manufacturers and distributors
 - ✓ Interviews collected from representative samples of the population to understand purchasing behavior and key needs regarding aligners
 - ✓ Interviews collected from a sample of dental laboratories
 - ✓ Interviews collected from a sample of dentists and orthodontists
- **Methodology:** integrated qualitative-quantitative analysis
- **Geoscope and Timing:** the analysis is carried approximately every year. **2025** editions will be available: **Italy** (May 2025), **Spain** (**NEW** June 2025). **France under evaluation**.
- **Output:** comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher.

Reasons to join

- The **ALIGNERS SCENARIO** provides guidance for companies' business strategies, helping them to understand emerging trends, patient behaviour, technological innovations and the strategies adopted by major competitors to better position themselves and increase effectiveness in their sales, communication and marketing activities.
- The report draws from Key-Stone's proprietary sources, combining market data with the perspectives of different stakeholders (dentists, opinion leaders, laboratories, and patients). All the outputs are **enriched by the expertise and know-how of Key-Stone consultants**, ensuring a deep understanding of the market dynamics.
- This approach is **scalable** to other countries, depending on the number of subscribers.

UNDERSTAND THE MARKET

GEOMONITOR

GEOMONITOR

The analysis of market potential by geographic area

Investigated topics and KPIs

- Geomarketing service for **market potential analysis of geographic areas**. The database shows the geographic distribution of key macroeconomic indicators and the estimated territorial breakdown of the dental sector
- The research includes a progressive **geographic disaggregation of the data**, allowing for the analysis of dental market potential down to individual cities
- Formulation of the "**Geomonitor Potential Index**" calculated based on key macroeconomic parameters related to the dental market, combined with an analysis of socio-demographic and structural segmentation

The investigation

- **Sources:** data reprocessing from Key-Stone and institutional sources
- **Methodology:** desk analysis
- **Timing:** analysis updated annually. Latest version available with data updated to 2024
- **Output:** Excel file
- **Geoscope:** Italy, Spain
- **Two kinds of Reports:**
 - ✓ Patients - potential of dental treatments per town/province/region
 - ✓ Dental offices - potential of dental products sales per town/province/region

Reasons to join

- Achieving a strategic advantage through a comprehensive assessment of the market and the **actual potential in a specific geographic area**
- **Define goals and evaluate performances** in different geographic areas basing on objective parameters
- The possibility of **receiving periodic updates**, useful for understanding the state of the market and its variations over time.
- **Scalable to other countries** (depending on the number of subscribers)

KNOW THE TARGET

OMNIVISION RESEARCH

Investigated topics and KPIs

- In the dental market, companies have traditionally focused on dialogue with professionals. However, in a context increasingly oriented towards **personalisation** and **patient experience**, understanding the **needs, expectations and behaviour** of the end patient becomes a crucial **strategic lever**. Key-Stone's OmniSalus explores the main **topics related to oral health and beauty** on samples representative of the population. In particular:
- **The annual Observatory** tracks: incidence of certain pathologies on the population, purchasing behavior, access to dentists, and dental spending (for oneself/children), needs and forecasts for dental care, as well as the experience, image, and positioning of brands and channels, effectiveness of brand communication campaigns, etc.
- **In-depth analyses (dedicated sections)** can be carried out on specific topics of interest, such as whitening, oral hygiene, orthodontics, aesthetic medicine, insurance, etc.

The investigation

- **Target:** population between the ages of 20 and 79
- **Methodology:** CAWI+CATI
- **Sample:** 3 waves of 3,000 cases each (**9,000 cases annually**), stratified according to ISTAT/INE parameters for regions, gender, age, and education level
- **Geoscope and Timing:** the analysis is carried out every four months, in **Italy** and **Spain**. **France under evaluation.**
- **Output:** comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher

Reasons to join

- The **OmniSalus** gives companies the opportunity **to reach the B2C target**, and gain continuous insights on a robust sample, so as to:
 - ✓ anticipate consumer trends and emerging demands
 - ✓ drive product and service innovation
 - ✓ Improve communication (B2C but as well dissemination of scientific content)
 - ✓ support the professionals with tools and materials that improve the relationship with the patient, increasing satisfaction and loyalty.
- **Ongoing and flexible platform**, with the opportunity to include **custom questions** (priced on demand) in different waves.
- **Extensive information at low investment** thanks to the multi-client approach.
- Key-Stone's extensive experience and expertise will **enrich the results by enabling subscribers to benefit from strategic advice** on the issues at hand.
- **Scalable to other countries** (depending on the number of subscribers)

OMNIVISION CLINICAL (FOCUS DIGITAL)

The omnibus investigating the impact of digital technology on dentists

Investigated topics and KPIs

Analysis of the digitization of dental practices in Italy, aimed at providing companies with insights to understand the current landscape and potential developments, through three main sections:

- **penetration of extraoral radiology tools** (analog, 2D, 3D): brands owned, year of purchase, purchasing propensity and drivers, desired features, purchase journey
- **in-depth study on CAD-CAM technology**: technology penetration, brands owned, purchasing/repurchasing propensity and drivers, purchase journey, etc.
- **survey on the use of applications** such as data and image sharing systems, tele-dentistry, Smile Design, guided surgery, and planning software

The investigation

- **Target**: dental practices representative of the entire dental sector in the analyzed geographic area
- **Methodology**: CAWI+CATI
- **Sample**: 500 cases
- **Timeline**: the analysis is carried every two/three years. Latest version available with updated 2023/2024 data for Italy and Spain.
- **Output**: comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher
- **Geoscope**: Italy, Spain.

Reasons to join

- The **OMNIVISION DIGITAL CLINICAL** captures the **key trends and possible developments** related to the digitization of radiology and other clinical technologies in the dental sector
- **Extensive information at low investment**, thanks to the multi-client approach and modular service model
- Key-Stone's extensive experience and expertise will **enrich the results by enabling subscribers to benefit from strategic advice** on the issues at hand
- **Scalable to other countries** (depending on the number of subscribers)

OMNIVISION CLINICAL (FOCUS DISTRIBUTION)

The omnibus investigating dentists' purchasing behaviour and customer experience

Investigated topics and KPIs

The survey explores the **dental practice supply system**, the dentists' purchasing behaviours and habits, and their experience with dental suppliers, desires and the required improvements and optimisation.

The omnibus investigate in particular:

- **detailed purchasing behaviors** in terms of:
 - ✓ consumables
 - ✓ equipment
 - ✓ implantology
 - ✓ orthodontics and aligners
- analysis of the **overall experience of dentists in their relationship with distributors**, with a specific focus on satisfaction and loyalty

The investigation

- **Target:** dental practices representative of the dental landscape in the analyzed geographic area
- **Methodology:** CAWI+CATI
- **Sample:** 400 cases
- **Timeline:** fieldwork starting in September, report available by the end of 2024
- **Output:** comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher
- **Geoscope:** Italy, *Spain and France (August 2025)*

Reasons to join

- This research provides a comprehensive analysis of the relationship between dentists and distributors, with the potential to identify **levers for customer loyalty or re-engagement of former clients**, as well as **differences between customer journeys** across various product categories
- **Extensive information at a low investment**, thanks to the multi-client approach
- Key-Stone's extensive experience and expertise will **enrich the results by enabling subscribers to benefit from strategic advice** on the issues at hand
- **Scalable to other countries** (depending on the number of subscribers)

OMNIVISION CLINICAL (FOCUS IMPLANTOLOGY)

The omnibus investigating implantology trends and his evolution

Investigated topics and KPIs

The research periodically investigates **the target group of dental implantologist**, analyzing their habits and behaviors, with a particular focus on **factors influencing the market**.

The analysis covers topics such as:

- **Target profiling** (who the implantologist are and where they practice)
- Analysis **of Brand Awareness** and **Brand Image**
- Analysis of **customer loyalty** and **retention** in order to identify the levers of loyalty
- **Cluster Analysis**: identification of some clinician profiles, differing in purchasing behaviour
- **Purchasing behaviour** (choice factors, possible switches and reasons)

The investigation

- **Target**: dentists who practice implantology
- **Methodology**: CAWI
- **Sample**: 400 interviews
- **Timing**: analysis updated periodically. Latest version available with 2025 data (Italy). Latest version available with 2023 data (Spain)
- **Output**: comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher
- **Geoscope**: Italy. **Spain and France (October 2025)**

Reasons to join

- **Ongoing monitoring** of evolving trends related to a **key target**
- **Extensive information at a low investment**, thanks to the multi-client approach
- Key-Stone's extensive experience and expertise will **enrich the results by enabling subscribers to benefit from strategic advice** on the issues at hand
- Direct involvement in designing the questionnaire for participating companies, with the option to include **exclusive questions** and receive a **customized report** (only for starting project)
- **Scalable to other countries** (depending on the number of subscribers)

MAPPING THE CUSTOMER JOURNEY ACROSS BUYING PERSONAS

Evolving dynamics in introduction and procurement processes. Focus on aesthetic restorative materials

Investigated topics and KPIs

The project goals:

- To **map the dynamics influencing decision-making**, such as the **growth of private labels and marketplaces** and the **emerging role of digital tools (including AI)** in order management and price comparison.
- To identify **psychological and behavioral profiles of dentists** (defining distinct “**personas**”) in order to refine segmentation for **more effective communication strategies**.
- To monitor the evolving roles of **sales representatives and digital tools** as complementary forces across different stages of the customer journey and across different customer clusters.
- To **understand how manufacturers and distributors can enhance adoption and retention**, identifying which tools are most effective, at which stages in the customer journey and for which clusters.

The investigation

- **Target:** representative samples of general dental practitioners involved in purchase decisions.
- **Methodology:** CAWI+CATI
- **Sample:** 200 cases each European country, 300 cases each for non-European countries, to ensure valid psychographic segmentation across highly diverse markets.
- **Timeline:** the first edition of the survey is ongoing. Results available in January 2026.
- **Output:** comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher.
- **Geoscope:** France, Germany, Italy, Spain, Brazil, China, USA.

Reasons to join

- The opportunity to access a **Cross-country strategic and behavioral map of the dentist's buying journey**, supporting interpretation and prioritization across journey stages.
- **To identify the most relevant touchpoints** throughout the customer journey, distinguishing between new product adoption and routine purchasing dynamics.
- To **map psychological and behavioral profiles of dentists enabling more focused and effective segmentation** for sales and communication strategies.
- To **obtain practical, evidence-based frameworks**, such as persona maps, touchpoint rankings, and journey models to support decision-making.
- **Extensive information at low investment** thanks to the multi-client approach.
- **Added value of a strategic consultancy** in interpreting results, leveraging Key-Stone's in-depth and long-term expertise in the dental sector worldwide.

OMNIVISION LABO ITALY

The omnibus investigating the state of the art in the Italian dental laboratories

Investigated topics and KPIs

Analysis of dental laboratories focusing on the following aspects:

- **sample segmentation** (number of employees, age range of owners, size, specialization, digital orientation, etc)
- **general trends** and specifically the balance between digital and analog workflow.
- **penetration of key digital technologies** in the laboratory sector (milling machines, 3D printers, Tabletop scanner), **intention to purchase** and reasons to buy (additional or replacements)
- in-depth analysis of the **digitization** status
- **CAD- CAM materials** usage for milling machines
- focus on **fixed prosthesis** and indirect restorations
- expected evolution of the sector

The investigation

- **Target:** dental technicians who are owners or lab managers
- **Methodology:** CATI/CAWI
- **Sample:** 300 cases
- **Timeline:** report available in Q4 2024 for Italy
- **Output:** a comprehensive report with key findings and strategic commentary, PDF document, presentation workshop led by a senior Key-Stone researcher
- **Geoscope:** Italy

Reasons to join

- Opportunity for the subscribers to receive valuable insights to understand the current **scenario**, the evolution of the context, and **to optimize commercial strategies related to the dental laboratory sector**
- **Extensive information at low investment**, thanks to the multi-client approach and the **modular service model**
- Key-Stone's extensive experience and expertise will **enrich the results by enabling subscribers to benefit from strategic advice** on the issues at hand
- **Scalable to other countries** (depending on the number of subscribers)

OMNIVISION LABO SPAIN

The omnibus investigating the state of the art in the spanish dental laboratories

Investigated topics and KPIs

Analysis of dental laboratories focusing on the following aspects:

- **sample segmentation** (number of employees, age range of owners, size, specialization, digital orientation, etc)
- **general trends** and specifically the balance between digital and analog workflow.
- 3D printer (Brand installed, purchase behaviour, procedures performed, etc..)
- scanner (Brand installed, purchase behaviour, additional service, etc..)
- milling machines and materials (Brand installed and purchase behaviour, use of blocks and discs)
- fixed and removable prostheses (Workflow's and technology weight)
- aligners (Penetration, average production and market share)
- consumer **Purchase**
- future scenario

The investigation

- **Target:** dental technicians who are owners or lab managers
- **Methodology:** CATI/CAWI
- **Sample:** 300 cases
- **Timeline:** report available in Q3 2024 Spain
- **Output:** a comprehensive report with key findings and strategic commentary, PDF document, presentation workshop led by a senior Key-Stone researcher
- **Geoscope:** Spain, last edition 2024

Reasons to join

- Opportunity for the subscribers to receive valuable insights to understand the current **scenario**, the evolution of the context, and **to optimize commercial strategies related to the dental laboratory sector**
- **Extensive information at low investment**, thanks to the multi-client approach and the **modular service model**
- Key-Stone's extensive experience and expertise will **enrich the results by enabling subscribers to benefit from strategic advice** on the issues at hand
- **Scalable to other countries** (depending on the number of subscribers)

OMNIVISION HYGIENISTS

Analysis of dental hygienists and current trends

Investigated topics and KPIs

The research investigates (since 2022) **the target group of dental hygienists in Italy**, analyzing their habits and behaviors, with a particular focus on the use and prescription of various products.

The analysis covers topics such as:

- **Target profiling** (who the hygienists are and where they practice)
- information about **the number of patients treated and the types of treatments**
- **relationships with clinical and sales representatives** (quality of the relationship and level of satisfaction)
- the role of hygienists in the **prescription/sampling** of products and associated brands
- the hygienists' influence on **purchasing decisions** in the practice

The investigation

- **Target:** dental hygienists
- **Methodology:** CAWI
- **Sample:** 300 dental hygienists
- **Timing:** analysis updated annually. Latest version available with 2024 data. *Next fieldwork planned in spring 2026*
- **Output:** comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher
- **Geoscope:** Italy

Reasons to join

- **Ongoing monitoring** of evolving trends related to a **key target**
- **Extensive information at a low investment**, thanks to the multi-client approach
- Direct involvement in designing the questionnaire for participating companies, with **the option to include exclusive questions and receive a customized report**
- Key-Stone's extensive experience and expertise will **enrich the results by enabling subscribers to benefit from strategic advice** on the issues at hand
- Opportunity to add 2/3 custom questions (priced on demand)
- **Scalable to other countries** (depending on the number of subscribers)

MEASURE AND OPTIMIZE BRAND PERFORMANCE

RESEARCHES ON BRAND

BRAND EQUITY

The analysis of brand value in the dental sector

Investigated topics and KPIs

- Multi-client analysis developed to assess the **strength of brands operating in the dental sector**.
- The survey identifies key performance indicators (KPIs) for brands, such as **awareness** (TOM, spontaneous, and prompted), **prominence, positioning, loyalty, purchasing behavior**, and future prospects for each brand included in the research.
- **Overall awareness values are calculated by statistically weighting the importance of each analyzed country relative to the total**, based on the number of dental practices present in each analyzed country

The investigation

- **Sources:** quantitative interviews to dental practices
- **Methodology:** CAWI and CATI
- **Sample:** >1.000 dentists divided across each analyzed country
- **Timeline:** research conducted every three years. Latest version available with 2023 data. *2026 edition under evaluation*
- **Output:** comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher
- **Geoscope:** Europe 5 (France, Germany, Italy, Spain, United Kingdom)

Reasons to join

- Achieving a strategic advantage by being able to **monitor brand performance over time, not only in absolute terms but also in relation to key competitors** across the various countries under investigation
- **Extensive information with low investment**, thanks to the multi-client approach and the **modular service model**
- Key-Stone's extensive experience and expertise will **enrich the results by enabling subscribers to benefit from strategic advice** on the issues at hand
- Opportunity to add 2/3 custom questions (priced on demand)
- **Scalable to other countries**

DSO BRAND TRACKING ITALY

The analysis that delves into the value of DSO brands and how they shape the Italian market

Investigated topics and KPIs

Quarterly survey aimed at:

- Understanding **the evolving landscape** and the positioning of different DSO brands and in relation to traditional dental practices.
- Identification of **differentiation and communication levers** based on the needs and purchasing behaviors of the population.
- Analysis of patient experience segmented by channels, brands, and target characteristics

The investigation

- **Target:** Italian population between the ages of 20 and 79
- **Methodology:** CAWI+CATI
- **Sample:** 3 waves of 3,000 cases each (9,000 cases annually), stratified according to ISTAT parameters for regions, gender, age, and education level
- **Timeline:** the analysis is carried every four months (April/August/December)
- **Output:** comprehensive report with key findings and strategic comments in PDF, presentation workshop conducted by a senior Key-Stone researcher
- **Geoscope:** Italy
- **Quotation:** available upon request

Reasons to join

- Opportunity to reach the B2C target, providing strategic information for communication, dissemination of scientific content, commercial strategies, and professional relationships
- **Extensive information with low investment**, thanks to the multi-client approach and modular service model.
- Key-Stone's extensive experience and expertise will **enrich the results by enabling subscribers to benefit from strategic advice** on the issues at hand
- Opportunity to include **custom questions** in different waves, either spontaneously or for continuous tracking.
- **Scalable to other countries**



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