Perceptions of Dentistry and Motivation Research
April 2012
Background/introduction
Background

• The British Dental Trade Association (BDTA) are seeking advice as to how to encourage more members of the UK public to visit dentist practices.

• Whilst the BDTA are keen to motivate *all* consumers they are particularly keen to encourage those who already visit dentists to explore and benefit from more than just ‘essential dentistry’.

• Ragdoll were commissioned to undertake a research project to inform the BTDA as to the most effective strategy for achieving this objective.

• This presentation contains the key findings and recommendations from this research activity vis-à-vis the overall objectives.
Objectives

- The core objective of the research was to provide the insights to inform the development of an initiative which will drive the public to their dental practice for appropriate reasons.

- These objectives can be broken down as:
  - Understand consumers’/patients’ perception of dentistry and their dental practice – vis a vis their general health as well as their oral health.
  - Benchmark perceptions/requirements of consumers oral health: essentials vs cosmetic, immediate vs future needs.
  - Explore and understand key relationships consumers have across their dental practice, ie with dentist/hygienist through to support staff – eg booking appointments/exploring additional services provided (cosmetic etc).
  - Determine the relationship people have with dental professionals in comparison to other health professionals.
  - Understand the core requirements/needs and expectations individuals have pre, during and post visit.
Objectives (contd)

• Explore and understand individuals’ perceptions vs reality of the dentist ‘experience’

• Explore how consumers evaluate ‘good dentistry’ and what they consider is ‘good dental health’

• Understand consumers’ preferred visitation requirements vis-a-vis dentist recommendation

• Understand the different ‘customer journeys’

• Determine and understand motivators and inhibitors to attend different elements of the process

• Investigate/understand ‘loyalty'/habit, vis-à-vis dentist choice/preference – influence of family/friends etc.

• Investigate consumers current/preferred dentistry information sources (if any) and determine the most appropriate forms of communication and messaging (media, timing, tone etc.) going forward, in the context of any other relevant campaigns people have seen. What are consumers looking for in terms of information vs what they are being given.

• Explore consumers’ attitudes/perceptions/opinions of NHS vs private dentistry
Research Approach

The project involved three key stages of activity: initial exploratory desk research followed by qualitative and then quantitative primary research.

As the first element of the research we undertook a review of all existing communications. The purpose of this was to find and subsequently evaluate any existing research findings and/or messaging.

The second (qualitative) phase of research involved x6 focus groups. These were undertaken face to face in Bristol (x2), Birmingham (x2) and Manchester (x2).

Ragdoll presented findings from the qualitative research (27/10/11) and discussed/agreed content for the subsequent quantitative phase.

The final stage of quantification was undertaken online, by way of a panel (x1500 respondents).

A document containing all findings from the quantitative research was forwarded to the BDTA.

A consolidation of all findings vis-à-vis the overriding objectives and recommendations for next steps.
Research approach - Quantification

- The table below demonstrates the sample frame for the quantification exercise.
- Apart from these 2 criteria: ie age and dentist ‘relationship’ the sample was nationally representative

<table>
<thead>
<tr>
<th>Sample frame</th>
<th>Private Dentist</th>
<th>NHS dentist</th>
<th>No dentist</th>
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<td>500</td>
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</tbody>
</table>
Sample frame

- This chart compares the ‘relationship with dentist status’ sample selected for the quantitative study compared with the UK nationally representative figures.
- We obtained the nationally representative figures by conducting an online poll – 5589 respondents.
- Respondents were asked “if they currently have/visit a dental practice/surgery.”
- We need to bear in mind therefore that when looking at individual customer/non-customer types our data is **not nationally representative**.
Sample frame

- The chart below compares the age bands of the sample selected for the quantitative study compared with the UK nationally representative figures – source ONS 2010
- Again We need to bear in mind therefore that when looking at individual customer/non customer types our data is not nationally representative.
Mapping the market
Who goes to the dentist?

- An online poll amongst over 5,500 respondents revealed that 25% of the UK population do not currently visit a dental surgery, whilst 75% either visit a private or NHS dentist.

- These figures were backed up by stats we uncovered in our desk research (Mintel/NHS/GDC).
Motivators/inhibitors to visiting the dentist

- Habit/maintenance: 70%
- Fear: 28%
- Access: 10%
- Cost: 34%
- Apathy/disinterest: 19%

Customers:
- Base 1500
- NHS dentist: 56.9%
- Private dentist: 13.4%
- No dentist: 17.6%

Non-customers:
- Base 1500
- NHS dentist: 15%
- Private dentist: 2.8%
- No dentist: 8.6%
- Apathy/disinterest: 10.0%
- Access: 6.8%
- Fear: 9.2%
- Cost: 9.6%

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Customers – attitude/value
Customers

• According to our quantitative poll (5500 consumers) 75% of UK consumers have a current relationship with a dentist.
• Clearly we have a different job to do here – we need to persuade these people to use more dental services than they do currently.
• The majority of consumers’ current motivation to visit the dentist is to ‘maintain good oral health’.
• Fear is another significant factor – but fear of what might happen if they don’t go as opposed to fear of going.

Base 1000

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Customers cont’d

• The majority of customers – NHS and private - visit their dentist at least once a year (88.8% Private : 92.6% NHS) – little value in promoting increased check ups.

• Hygienist visits are considerably less regular with some customers (16.6% private : 35.8% NHS) claiming never to visit – some opportunity here in terms of additional custom.

• 76% of customers claim that they follow their dentist’s advice in terms of frequency of visits. Clearly the dentist’s advice/influence is highly valued.
Customers cont’d

- Typically customers see the relationship they have with their dental practice as better than the one they have with their doctors surgery. This difference is more marked for private customers.

- Having a recommended / trusted dentist was one of the main insights taken from the qualitative stage of the research. It is now clear that this is a major factor and very important to people when considering / choosing a dentist. Trust in the dentist is far more important for customers than how specialist / experienced they are.

**Important elements of ‘a good dental practice’**

- Trusted/recommended: 59.0%
- Specialist/experienced: 19.3%
- Consistent service/staff: 15.4%
- Other: 6.3%

**Base 1000**

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The chart above demonstrates that customers have scored the relationship they have with their dentist at quite a high level – far outstripping scores for any other dental staff. (Note the low scores here for the hygienist.)

We do also know however that 24% of private customers moved to their current practice as they were dissatisfied with their previous dentist’s service perhaps indicating that expectations are higher for the private customer. (Only 14% of NHS respondents moved dentist for this reason.)
Customers cont’d

- The chart below demonstrates that a significant proportion of customers are ‘warm’ to a variety of non-essential dentistry treatments.
- With 52% of NHS customers and 45% of Private customers claiming not to have ever had any non-essential/cosmetic dental treatments however, there is clearly a big opportunity here.
- **Awareness** is also a key issue, with as many as 1/5th of respondents not knowing what services their current dentist does/doesn’t offer in some cases.
Customers – perceptions of costs/value for money
Costs/value for money

- It is clear that the availability / transparency of costs relating to dentistry and dental services could be made easier to understand / more clear.

- Whilst over 2/3 of respondents claim that the costs associated to dentistry are completely clear (33%) and fairly clear (31%), **many respondents have no idea and are unclear around the costs and associated pricing structure**.

- Clarity of cost tends to be highest amongst the private patients (36%) – an opportunity to develop key messaging based around a clear and transparent pricing structure?

- This lack of clarity around dental costs highlights an opportunity to develop key messaging and transparent pricing i.e. what things cost (even if it’s a range / scale) and the fact that if they want to, patients can go elsewhere or negotiate bits at a time etc.
Costs/value for money (cont’d)

- It tends to be private patients who feel that their dental surgery offers them better value for money – 49%.

- Whilst not paying the same amounts as those who are private, NHS patients feel that the value for money that they receive is mostly “average” or “could be a bit cheaper” – 53%.

- Of those respondents who felt that they weren’t getting “value for money”, the main reason cited was the fact that they felt that they were being overcharged (price was too high) for the services received – 65%.

- Worryingly 17% of respondents felt that their dentist was out to “line their pockets” / “cash in” on the treatments undertaken.
Customers – what should we be saying to them?
Messaging

• When exposed to messaging prompted from the qualitative research we can see that generally customers are more motivated than non-customers.
• Interestingly the one message that relates mostly to encouraging customers to use more services is currently the least motivating for customers – NHS and private customers alike.

How motivating are the following in terms of prompting you to visit a dentist?

- No fuss
- Confident smile
- Looking after teeth now to save money and pain later
- Friendly/reassuring staff
- Trustworthy dentists
- Value for money
- Thorough check ups
- Wide range of services

Base 1500

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importance of attributes

• When exposed to the 6 key messaging attributes we derived from the qualitative activity, we can see ‘good oral health’ is by far the most important factor for customers – NHS and private customers alike.
• A ‘good dental practice’ is also of considerable importance to these consumers.
• ‘Aesthetics/perfect teeth’ – which one might associate with ‘non-essential/cosmetic dentistry’ - is one of the least significant factors for this audience.

Base 1500
Good oral health

For customers ‘good oral health’ priorities are ‘healthy gums’ and ‘fresh breath’. It is notable that these factors are more important than ‘clean/strong teeth’.
A good dental practice

As we saw for non customers – the priority for ‘a good dental practice’ is a ‘trusted/recommended’ establishment.

Base 1500
Elements of dentistry more important than cost

- As we saw earlier ‘good oral health’ is key to both private and NHS customers – and it is this that they believe they are maintaining by regular check ups.
How should dentists encourage more people to visit them? (spontaneous)
Customers – where/how should we be saying this?
Promotion – where/how should we doing this?

- Although higher than non customers, customer recall of any promotions/advertising around dentistry was relatively low (27% Private : 19% NHS).

- For those who had seen any promotional activity, TV accounted for the largest share (45% Private : 50% NHS).

- When asked where they felt dentists should promote their services however, as we saw with non-customers ‘local’ was resoundingly the key theme.
Best place to promote dentist services (spontaneous)

Base 1000
Promotion – where/ how should we doing this?

- By far the majority of customers – NHS and private alike – found their current dentist by **word of mouth**.
- Similarly they would choose a personal recommendation over any other means of finding a new dentist if they needed to (67% private : 65% NHS).
- As we saw with non-customers, the internet **was perceived to be** a key resource when looking for a new dentist.
Promotion – where/how should we doing this?

- In terms of finding out about specialist/non essential dental treatments the role of the dentist is key for current customers – NHS and private customers alike.

- Similar to non-customers the internet would also be a popular resource.
Customers - summary

- We estimate that approx 75% of the UK population currently have an ongoing relationship with a dentist.

- The majority of these customers are regular visitors to the dentist and associate this with maintaining good levels of oral hygiene – their key motivator for visiting (88.8% Private: 92.6% NHS visit at least once a year).

- Our survey has shown that there is a considerable appetite amongst current customers (NHS and private) for non-essential/cosmetic dentistry – whilst many have not as yet experienced any (52% of NHS customers and 45% of Private customers).

- Awareness – lack of - of non essential dentistry appears to be an issue amongst many customers.

- Customers typically rely on their dentist and trust their advice and the majority say they would ask their dentist if they wanted to find out more about non-essential dentistry – clearly we need to maximise any opportunity here.
Customers - summary

• By far the majority of customers – NHS and private alike – found their current dentist by **word of mouth**. Similarly they would choose a personal recommendation over any other means of finding a new dentist if they needed to (67% private : 65% NHS).

• As with non-customers, the internet would be a key resource for fact finding about non-essential dentistry.

• In terms of messaging, for current customers, the key motivators are around ‘maintaining good oral health’ and a ‘good dental practice’.

• Customers are not typically motivated by the concept of either ‘perfect teeth’ and/or ‘a wide range of services’ which we might associate with the promotion of non-essential dentistry.

• A key challenge for us therefore will to make this messaging relevant in the context of promoting cosmetic/non-essential dentistry.
Non customers – attitude/value
Non customers

- 1/3 of non customers don’t go to the dentist because they feel it is too expensive.

- More significantly for us, perhaps however is the fact that over ¼ of non customers’ don’t go to the dentist because they are afraid. This equates to approx 2.5 million consumers.
Non customers cont’d

- Only 1% of non customers claim never to have visited a dentist.
- Only 33.6% claim to have experienced cosmetic dentistry however.

When last visited dentist

Cosmetic treatments experienced

Customers
Non customers
Non customers cont’d

As reflected in ‘reasons for not visiting a dentist’ key motivating factors to revisit are ‘lower costs’ and a change in consumers perception of a visit being a ‘frightening experience’.
Non customers – what should we be saying to them?
Messaging

- Our job here is to motivate these people to **resume a regular relationship** with a dentist.
- ‘Value for money’ and ‘trustworthiness’ stand out as being the most motivating of these messages for non customers.
Importance of attributes

- When exposed to the 6 key messaging attributes we derived from the qualitative activity, we can see that ‘fear’ (as a barrier to treatment) is very significant for non-customers.
- ‘Good oral health’ and a ‘good dental practice’ are also of considerable importance to these consumers.
- “No fear” when going to the dentist was a major factor taken from the qualitative research – we know that many respondents literally dread the experience of going and anything that can be done to alleviate this would be very welcome.
- Clearly respondents feel a relaxing friendly environment could help with this.

![Most important aspects of dentistry: allocating 100 points – mean scores](chart1)

![Importance of elements of attribute: ‘No fear dentistry’](chart2)
‘A good dental practice’

- For non customers (and customers alike) – the priority for ‘a good dental practice’ is a ‘trusted/recommended’ establishment. This would perhaps reflect their need for ‘personal’ reassurance due to their ‘fear factor’.

![Bar chart showing preferences for a good dental practice](chart.png)

- **Non customers**: Trusted/recommended 17.0%, Specialist/experienced 13.4%, Consistent service/staff 9.4%
- **Total**: Trusted/recommended 20.5%, Specialist/experienced 16.4%, Consistent service/staff 4.7%

Base 1500
Here again, we see the significance of ‘fear’ (or no fear) and ‘good dental practice’ for non customers.
How should dentists encourage more people to visit them? (spontaneous)
Non customers – where/how should we be saying this?
Promotion – where/how should we be doing this?

- Non customers had the lowest recall of any promotions/advertising around dentistry (14%).
- This is likely to be due to a large proportion of our non customer respondents being currently disengaged.
- For the 14% who had seen any promotional activity, TV accounted for the largest share (49%).
- When asked where they felt dentists should promote their services however ‘local’ was resoundingly the key theme.
Best place to promote dentist services (spontaneous)
Promotion – where/how should we be doing this?

- In terms of **finding** a dentist, ‘word of mouth’ is key. This may well be a reflection of consumers needs we have identified earlier – ie ‘a good dental practice’ and a ‘no-fear’ experience.
- These needs are personal and perhaps difficult to address/meet through conventional advertising/media alone.
- The internet is also a key resource for non customers (50.4%) – this is *perceived* as opposed to *actual* behaviour however.
- 86.2% of respondents said if they did use the internet to find a dentist they would go to an NHS/NHS direct website.
Promotion – where/how should we be doing this?

- In terms of finding out about **specialist/non essential dental treatments** the internet is the most popular first port of call.

- Word of mouth may be less popular here for several reasons:
  - Less likely to know people who could recommend?
  - Less knowledge of treatments – need to research?
  - Less likelihood to pursue – therefore less need for personal recommendation?

![Bar chart showing promotion methods](chart.png)

**Base 1500**

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It is clear that the majority of respondents who would use the internet to find a new dentist will do so using NHS services. This includes the main NHS website as well as NHS direct. Even private patients cite this to be the case (67%). After the main NHS sites, internet search engines are the most commonly used tool online.
Non customers - summary

- We estimate that approx 25% of the UK population do not currently have an ongoing relationship with a dentist.

- The majority of these (62%) have not visited a dentist for over 2 years.

- Only 1% claim never to have visited a dentist, however, so for whatever reason, these consumers do not currently value an ongoing relationship with a dentist.

- For 1/3 of this audience the primary inhibitor is cost, whilst for 1/4 it is fear that is holding them back from visiting.

- Fear manifests itself in several different ways and we need to be mindful of this in any relevant messaging.

- Non-customers would be motivated by the concept of their dentist offering ‘a relaxing friendly welcoming environment’.
Non customers – summary cont’d

• Trust goes hand in hand with the ‘fear factor’ and these consumers also value the concept of a ‘good dental practice’.

• If we are to entice any of these consumers back into regular dentistry clearly we need to address these issues with our messaging.

• **Word of mouth** is the key to this audience in terms of them finding a dentist - initiatives undertaken to entice this audience to return to a dentist need to be on a local and personal level.

• The local/personal media would seem particularly appropriate/necessary in terms of addressing the ‘fear factor’.

• This could be supplemented by online activity driving customers to NHS websites.

• Although these non-customers are less likely to be receptive to non-essential/cosmetic dentistry they have stated that their preferred method for finding out about this would be online.
Further sample analysis – Age/SEG/location/gender

• The following slides provide a summary following our analysis of the **total sample** where we have looked for any trends/patterns in terms of respondents’ age, SEG, gender and location.
Non customers

- Whilst all age groups are most motivated by cheaper costs, 45-64 year olds are the most likely to be motivated by ‘less frightening treatments’ suggesting this is a more prominent issue amongst these age groups.

- Men are more motivated than women by cheaper prices, whereas women are more motivated than men by less frightening treatment methods.

- Fear is the most prominent issue amongst those who are unemployed. Overall cheaper costs is the main motivator to re-visit – markedly so for senior managers.

- All regions except Wales cited cheaper costs as the main motivating factor, whilst in Wales less frightening treatments was seen as being more motivating.

- 25-34 year olds are the highest users of cosmetic dental treatments. For those aged 35+ dental crowns is the most common cosmetic treatment used.

- Those with more senior employment status have a greater experience of such treatments.

- Greater London has by far the most users of cosmetic treatments (56.2%).
Customers

- Whilst the majority state their main reason for visiting the dentist as wanting to maintain good oral health (associated with regular visits), a major factor for 18-24 year olds is that they are worried what might happen if they don’t go.

- Motivation to visit the dentist amongst those with more senior employment status is predominantly around maintaining good oral health. As we move down it becomes more a case of habit and fear of what will happen if they don’t.

- Frequency of check-ups increases with age.

- Respondents in Greater London claim to visit the dentist the least frequently.

- Respondents in the North claim to visit the hygienist more frequently than those in the South.

- Reasons for moving dentist differ by region, however those in Greater London claim to have been the most dissatisfied with the service at their previous surgery.
Customers cont’d

• Greater London had the highest number of respondents citing that they believe private
dental surgeries to be better than NHS.

• Amongst those who do want to see the same dentists each time they go the majority state
that this is done automatically in most cases. This is less so in Greater London where
almost half claim that they have to request it.

• Respondents rate the relationship with their dentist higher than with other members of
surgery staff. This relationship is lowest in Greater London.

• Similarly, Greater London had the highest number of respondents who were unhappy with
service/friendliness of dental staff.

• Usage of cosmetic treatments increases with age until 65+ where it begins to decline.

• Women are more ‘vocal’ when advising how dentists might improve their service.

• Men are more likely than women to attempt to negotiate costs.
All respondents

• Women claim to have better oral health than men. Women also claim to brush more frequently than men.

• With the exception of manual workers those with more senior employment status claim to have better oral health.

• Those with more senior employment status are slightly less fearful of the dentist.

• A clear increase can be seen in importance of late night / weekend openings with employment seniority.

• ‘State of the art equipment’ is more important amongst the older age groups.

• The importance of ‘aesthetics / perfect teeth’ decreases with age, whereas the importance of a ‘good dental practice’ increases.
All respondents cont’d

• A ‘trustworthy dentist’ is more appealing to the older three age groups.

• Women are more motivated than men by all the messaging options given.

• Those who would choose to find a dentist online decreases with age whilst those relying on recommendations / word of mouth increases. Women are also more likely to use word of mouth / recommendations as a way to find a new dentist.

• Whilst the majority would use a search engine if using the internet to find a new dentist, women are much more likely than men to use NHS direct – which they also have a higher awareness of.
Greater London

• One key finding from the demographic study of respondents was a distinct difference, on numerous levels, of respondents’ attitudes and behaviour around dentistry in the Greater London area.

• This was particularly marked in the following areas:

  Behaviour:

  – Less frequent check ups

  – Less frequent visits to the hygienist

  – Greatest experience of cosmetic dentistry

  – Most likely to have moved dentist because they were dissatisfied with their previous dental practice
Greater London

- Largest proportion who make their own mind up about frequency of visits as opposed to taking advice from the dentist.

**Attitudes:**

- Highest perceived costs
- Lowest opinion of dental surgery in terms of relationships with and competency of staff
- Most likely to say they believe private dental practices offer better service/treatment than NHS practices