

DANDY DENTAL STUDY

# Patient Experience

STUDY BY DANDY X ISURUS MARKET RESEARCH

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# Introduction

## **What do dental patients care about the most?**

It is a question that you have asked yourself often. You even have asked your patients, and while you've received answers—and read your online reviews—the majority are reticent to be critical of the person who wields the dental drill in-person. It is a question that we at Dandy ask ourselves daily as we think of how we can enhance patient experience at the dental practices of our partners.

## **We thought it was high time to get answers.**

Dandy partnered with a third-party market research firm to candidly uncover the wants, needs, and expectations of the modern US adult dental patient. We took the findings and consulted some of the top minds in dentistry to put the data into perspective and add actionable advice based on the insights. We hope that the Dandy Dental Study: Patient Experience will give you valuable observations that you can use to bolster your practice and improve the lives of your patients.



“All dentists have the clinical knowledge to be great doctors, but what is often missed in dental school and training is how to deliver exceptional patient experience,” says Dr. Jeremy Wano, the Head of Customer Experience Programs at Dandy. While compassion is certainly part of the recipe, that’s just scratching the enamel, there is so much more into having patients feeling fulfilled with their relationship with you...

**The Dandy Dental Study: Patient Experience plunges deep into what those in your care are really looking for from practice operations to digital dentistry and precisely how they seek it out.”**

**Broadly we will look at:**

- What causes patient affinity and dissatisfaction.
- How to retain your current patients.
- How to attract new patients.

**Along the way we will delve into specifics like:**

- How often patients change dentists, and what are the main causes.
- What are the simplest ways to enhance patient experience.
- What factors do prospective patients look for in a new practice and how do they do their search.
- Our exclusive research certainly confirmed some notions we all have had—which is helpful—but it also uncovered some perspectives that aren't (yet) universally ascribed to.

**For instance which of the following do you think has the highest correlation with patients appreciation of their dental practice?**

- A. Same or next day appointments
- B. Night or weekend hours
- C. Minimal waiting room time
- D. Convenient location to them

The answer was resoundingly: **C. minimal wait time**. While many practices stretch on nights and weekends to provide convenient hours for their day-working patients, it turns out they are fine coming during the day, they just want truly to be seen at the scheduled appointment time. Instead of asking the staff to work a late Thursday or to come in on the weekend, you can achieve more by scheduling smarter during normal operating hours.

Read on for more learnings and actions from the **Dandy Dental Study: Patient Experience**.





We believe that  
you treat the  
patient as much  
as the tooth.

# Background

Dandy knows that satisfied patients are more than just good business; you entered the medical field to help people and communities. But if any dentist can fill a cavity, which aspects of your practice set you apart? Why should a patient choose you over the competition? If keeping the operatory lights on means retaining existing patients and growth is a matter of attracting new ones, what is the secret amalgam for great patient experience? We at Dandy believe that you treat the patient as much as the tooth.

You are in the mouth of a patient but how do you get into their head?

**Enter the Dandy Dental Study: Patient Experience.**

**With the help of Isurus Market Research, we conducted a survey of adults across the US, at the heart of which was a central question: “What do patients care about most?”**

“If you are on the forefront of continuously wanting to improve your customer experience, you *kind of* know these things,” says Dr. Delaney Spaulding, a dentist whose boutique practice, Ross Bridge Dentistry in Hoover, Alabama boasts over 145 5-star Google reviews. Dr. Spaulding points out that being in continuous practice means your intuition can be a good guide. But, she says, even for the most recalcitrant (or in Dr. Spaulding’s case, assured) dentist, the information we’ve gleaned is undeniably valuable to growing a dental practice. “If you can approach [the issues highlighted in the Dandy Dental Study] and minimize the hurdles that typically push patients away, that’s only gonna make your office much better.”

We polled a wide swath of adults in the US who attend the dentist with some form of regularity. Respondents represented a diversity of ages, locations, backgrounds, genders, and incomes, providing detailed information about—but not limited to—perceptions of their dentist, methods by which they find and select a doctor, and experiences with both restorative and elective procedures. A total of 600 individuals aged 26-66+ were polled, answering over 40 questions using a Likert scale ranging from 1 (poor) to 5 (excellent). All respondents to the survey had undergone a dental procedure within the last 10 years. Results were subjected to statistical analysis, ensuring that the data presented is not only salient but durable.

Our hope is that, by furnishing you with data-driven insights into what patients care about most, you can make smarter, more dynamic, more compassionate decisions about how to grow your business and position yourself at the forefront of patient care.



# General dentistry findings and how they relate to patient experience

As you'll see in the following pages, the Dandy Dental Study: Patient Experience has identified several discrete and, dare we say, surprising factors that may play significant roles in your ability to attract and retain new patients, prevent attrition, and encourage practice growth. But before we dig into some of the more specific and novel findings, let's linger for a moment on factors that describe the general conditions of the modern dental patient and how they relate to patient satisfaction.

To level-set, our data shows the sense of the frequency and conditions under which patients are visiting dentists. **According to the survey, we see that while just 8% of respondents only go to the dentist when something is wrong, a full 67% of all respondents reliably go for a cleaning and/or checkup every six months with 20% returning for the same reason once a year.**

When it comes to procedures, the Dandy Dental Study tells us that the total average number of procedures of any kind performed in the last decade is 1.4 with a maximum of 5. Linking these with other data gleaned from the findings, we can say that, as it stands now, you can expect about  $\frac{2}{3}$  of your healthy patients older than 35 who initially come to you for a cleaning to return at least once a year. These patients are likely to have a cavity filled once during their tenure with you, but are unlikely to opt for an elective procedure of any kind. Later, we will address how those statistics can be affected by thoughtful applications of our insights, but for now, the above is a pretty reasonable description of your average patient's dental journey.



Before discussing the more malleable factors driving patient satisfaction, we should establish which important baseline factors are either impossible to change or may not be worth the return on work put in—these are your location and insurance plans accepted. These can be considered threshold conditions—that is, independent of all other criteria, it's a near-certainty that minimum conditions of both must be met before a patient will even walk through your door. For an established practice, it may go without saying that, outside of the onerous measure of taking on more insurance companies, there isn't much you can do to meaningfully affect either, but that does not mean that there's nothing you can

do to significantly increase patient satisfaction. For those planning on starting a practice, we suggest relentlessly researching the geographic demographics and accessibility before signing your lease.

The survey shows that payment is a factor, but not as big as you may have thought. It likely comes as no surprise that 72% of all respondents pay for dental care through their insurance. For those dentists practicing in lower income areas they may need to focus on payment plans as 41% of those with a household income of less \$50,000 do not have or use insurance.



Consumers' perceptions of the potential personal experience bears significantly more weight on their selection than cost or expertise.



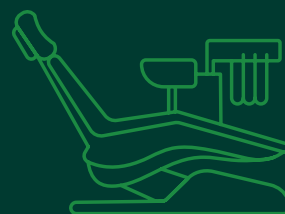
Somewhat more surprising is that, while 73% of respondents rated their dentist's offering of payment options outside of insurance as 'good' to 'excellent,' according to the survey just 8% of all respondents looking at online reviews when selecting a dentist search specifically for words related to "affordability" with just 3% searching for terms related to "payment plan." From these (and other supporting data collected by the survey) we can draw a valuable inference: both patients with and without insurance who look at online reviews of dentists prioritize the nature of their experience over cost, that is, assuming threshold conditions are met, consumers' perceptions of the potential personal experience bears significantly more weight on their selection than cost or expertise.

"There's an absolute direct correlation between patient perceived satisfaction and your bottom line," says Dr. Barry Bartusiak whose thriving Southwestern Pennsylvania crown and bridge practice boasts over 250 5-star patient reviews. "Patients," Dr. Bartusiak says, "don't care or don't know if I did a good job—if I'm Da Vinci in the way I did their fillings—they have no idea. But their perception, because we treated them with respect and kindness, leads us to where we wanna be," adding "The patient's perception is, '[Dentists are] all about the same,' so what sets you apart is, in my opinion, how you treated them."

When it comes to the most common types of procedures, as your experience may indicate, restorative are much more frequent than elective, with 83% of all respondents having undergone some type of restorative procedure. For the dental procedures most endured in the past 10 years, crowns and bridges were the most popular with 47% having had that type of posterior work and 20% for anterior part of the mouth. Cavities filled was just behind with 66% of dental patients receiving that care. The next most common procedures in order were root canal, whitening,

removing of wisdom teeth, and fitting a night guard. 11% of respondents received Clear Aligners to 4% who had braces installed. Three-quarters of all respondents having undergone no elective procedures of any kind though of those with a household income of \$100,000 or more 36% had such work.

In the above, you will likely have recognized trends reflected in your own practice; whether this is edifying or surprising can be chalked up to the ineffable—what makes you and your community unique. But having established some general level-setting for the population in question, we can clearly see that there are a few key arenas in which closer and more focused attention to data would be of material benefit to anyone. What follows then, is more tightly focused data and insights aimed at improving your patients' satisfaction across the board.



How do your  
practice  
benchmarks  
match-up with the  
above information?

# Attracting new patients

## Data gleaned from the survey can be instrumental to identifying potential new patients to your practice.

Using these data, we can shed light on concrete measures you can take to reliably increase this number. It may sound obvious, but reliably attracting new patients is largely a matter of targeting the right populations, knowing how to reach them, and converting current patients into valuable referrals by maximizing per-patient satisfaction. What's less obvious are which populations represent your greatest opportunity for patient acquisition, the degree to which your practice's internet presence matters, and exactly which conditions correlate with high patient satisfaction.

Though it's impossible to identify exactly how many people at any given time are searching for a dentist, according to our survey, patients tend to switch dentists every seven years with ~15% switching every year. Smart application of the Dandy Dental Study's insights can give you a leg up on competition, actually

making patient churn and aging local doctors work to your advantage. Let's identify the primary groups of people most likely to be looking for a dentist at any given time and some of the features inherent to each.

Age is a large contributing factor to patient behavior on many levels. According to the study, patients who frequently switch dentists tend to skew younger, with 72% of 26-35 year olds switching within the last five years for various reasons including patient experience though it is important to point out that 40% switched due to moving out of proximity. This is in contrast to patients aged 55+ who are much more likely to have stayed with the same dentist for 10+ years. However, of these older patients, a full quarter was forced to switch due to their current dentist retiring. Combined, these two age groups represent more than half of all respondents. When zooming out, nearly ¼ of all respondents, regardless of age, have left their dentist due to a perceived poor experience.



Patients who frequently switch dentists tend to skew younger

Patients aged 55+ are much more likely to have stayed with the same dentist for 10+ years

Now that we know who is most likely to be looking for a dentist at any given time, we can identify the factors that are most likely to attract them.

“In this day and age you have to commit to marketing your practice,” says Dr. Len Tau, dental consultant extraordinaire and author of *Raving Patients: The Definitive Guide To Using Reputation Marketing To Attract Hundreds Of New Patients*. “The reason you market your practice is you want to attract more new patients. In order to do that you have to make it easy for patients to want to come in and see you. So generating reviews, making yourself more visible—that’s something I consider foundational. You have to do that before you start marketing your practice.”

Though it is vital, we know that local marketing isn’t part of dental schools’ curriculums, nor something we feel you need to hire an agency for. Allow the Dandy Dental Study: Patient Experience to serve as your market research and help set your hierarchy of communication focuses.

It is worth noting that, according to the survey, among those actively reviewing potential dentists online, the most searched terms after location and insurance information are related to specific procedures. While the content of these subjects are simply reflective of your current practice—unless this motivates you to add more offerings like Clear Aligners and Sleep Apnea appliances (which is simple with Dandy) they are paramount to list on your website, social media, and any local marketing materials.

Of the soft factors that you can expect to influence out-of-the-box, among all potential patients who look at reviews online, consumers tended to actively search for words and phrases indicative of an overall “pleasant” experience. In a moment we will be addressing which segment of your patient pool most often engage online reviews, which sites they visit, and the importance of your online presence, but for now, the key takeaway in this section is that **40% of all survey respondents who read online reviews tended to search for specific words or phrases, and of those, a plurality (38%) searched for words specifically related to a practice’s overall demeanor.**



## In this day and age you have to commit to marketing your practice

The words, “Nice, friendly, caring, helpful, kind, patient, understanding” were the most searched with those specific phrases having a 41% correlation with 5 out of 5 satisfaction ratings, and 37% with 4 out of 5.

The next most sought words/phrases the survey identified also related to positive personal experience: “good, great, excellent, satisfied” and “professional, good bedside manner, reliable,” each making up 20% of searches.

As even a cursory glance at the wordcloud on the next page shows that while expertise and qualifications are important to those researching dental practices online, they’re secondary concerns. In other words: patients’ recommendations tend to be predicated on the customer-service aspect of their dental visit, and this tends to be the basis for selection.

“When it comes down to it, patients typically do not know the different types of procedures that you are offering or why you’re higher trained in certain things,” Dr. Spaulding tells us. “Something that is very tangible to every single person that interacts with your office is how they feel and how they see your office.”

From the beginning, Dr. Spaulding’s general practice polestar was customer service and a boutique feel eschewing the more onerous elements common to medical offices. Her patients’ positive reactions have translated into business growth. “[Patients] tell us all the time that this is a different kind of office than anything they have ever gone to just because it doesn’t feel like a medical office,” she says. “It feels like they’re going in and getting a personal shopper for their mouth.”

# Consumers tended to actively search for words and phrases indicative of an overall “pleasant” experience

HELPFUL

KIND

FRIENDLY

CARING

UNDERSTANDING

NICE

PATIENT

PROFESSIONAL

GOOD

GREAT

SATISFIED

RELIABLE

EXCELLENT

COMPETENT

GOOD BEDSIDE MANNER

GENTLE

NO PAIN

PAINLESS

HONEST

NO UNNECESSARY PROCEDURES

TRUSTWORTHY

QUALITY SERVICE

THOROUGH

QUALITY

EXPERIENCE

EXPERIENCED

KNOWLEDGEABLE

NO WAIT

QUICK

CONVENIENT

EASY

ON TIME

GENERALLY POSITIVE/GOOD REVIEW

GOOD PRICE

TREATMENTS/PROCEDURES OFFERED

AFFORDABLE

The evidence for the efficacy of this approach is a high number of recommendations and overwhelmingly positive online reviews. “[Patients] want to tell us, but they also want to tell their friends about the customer service experience that they received.” As previously alluded, one of the survey’s key findings involves the current and growing importance of online reviews. Overall, 67% of respondents said they would or did research a dental practice’s online reviews before making a decision to switch. Just 23% of the total respondents reported that they did/would not read online reviews. 10% simply weren’t sure.

You may be asking: who precisely is my online presence attracting? The answer may surprise you. As your own intuition may tell you: age is the most significantly correlated variable with these numbers; in general, the instance of/likelihood of online review engagement decreases with age. We found that 74% of the youngest respondents to the Dandy survey (under 35) and 79% of the next to youngest (36-45) would look at online reviews.

In contrast, only 38% of the oldest respondents (66+) said the same, with 45% of respondents in that age group saying that, no, they would not look up online reviews of any kind before making a decision. These patients are likely to be swayed by referrals.



Patients want to tell their friends about the customer service experience that they received... like a personal shopper for their mouth.

## Growing importance of online reviews

77%



of people look at the practice’s **website** before selecting them as their dentist

67%

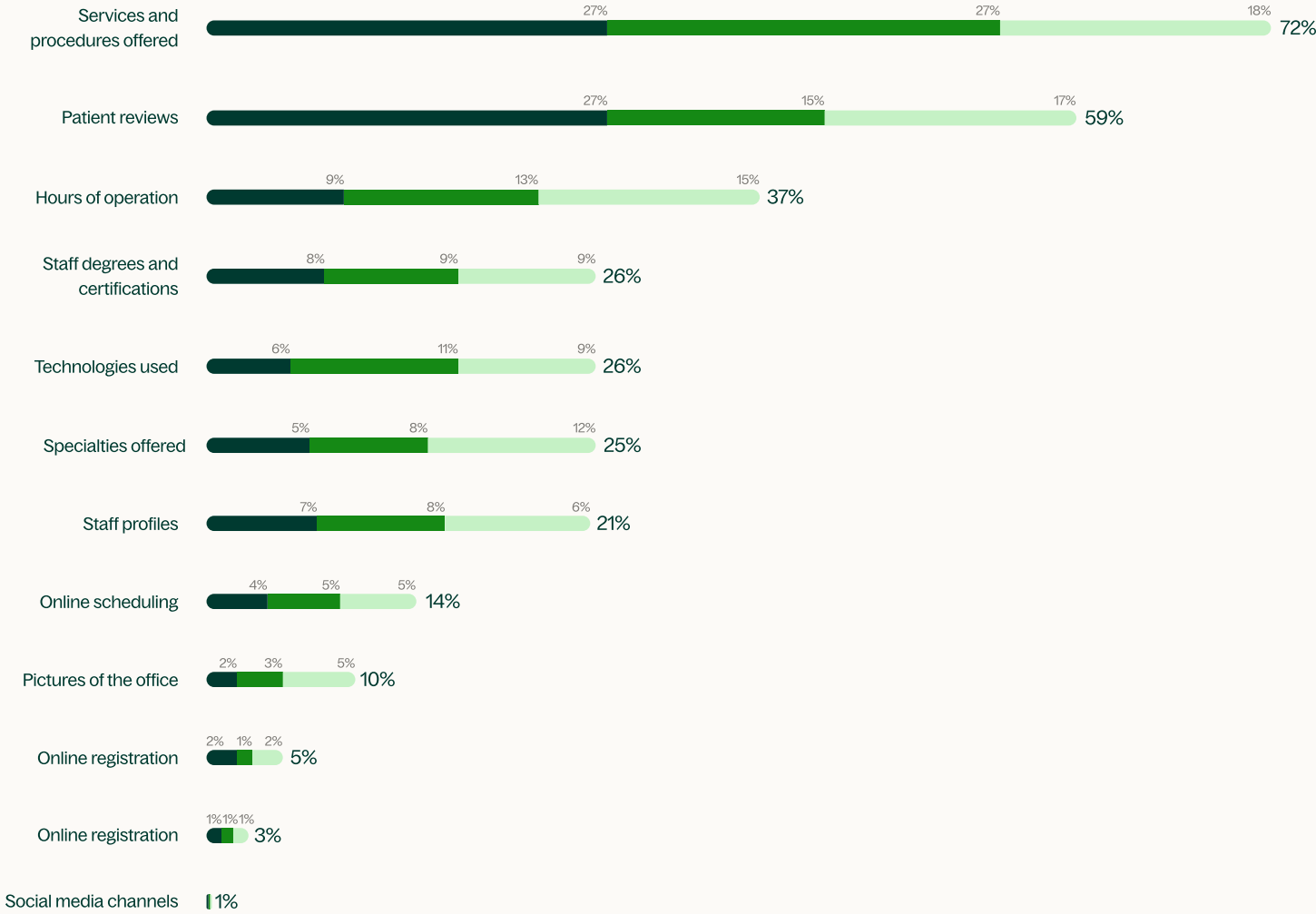


of people looking for a new dentist use **online reviews**

# Most important things on a dentist's website

% of respondents looking at website

Ranked 1<sup>st</sup>   Ranked 2<sup>nd</sup>   Ranked 3<sup>rd</sup>



Regarding the specific sites people tend to visit for dentist reviews, interestingly, the segment of consumers using healthcare-specific review sites such as Healthgrades tends to be defined, not by age, but by attitude i.e. those who diligently research all of their purchases vs. those who do not. But among those who engage online reviews, we see the largest discrepancy among respondents in social media, with the youngest respondents twice as likely as the oldest to rely on reviews posted to Facebook. By far, the biggest source of online reviews according to the Dandy Dental Study is Google representing 81% of all respondents who look at online reviews. The next most frequently viewed is Yelp (45%), Facebook (30%), and Healthgrades (23%) with other sources making up 6% of all respondents who look at online reviews. But it's also worth pointing out that, beyond any particular site's popularity or credibility, factors such as passive review reading (i.e. Google automatically surfacing reviews upon simple searches/map searches) SEO, and overall brand awareness may all play significant roles in consumers' engagement with one site over another.

Outside of review aggregate sites or passive search-engine engagement, consumers tend to visit practices' websites with 77% of all respondents saying they did and/or would look at a new dentist's website before switching, but we will discuss that topic in detail a bit later.

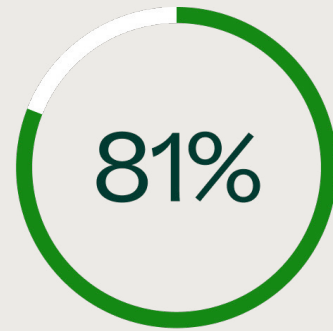


88% of prospective patients 35 years old and under, read a dental practice's **Google Reviews** during the research process.



50% of that age range consulted **Yelp**.

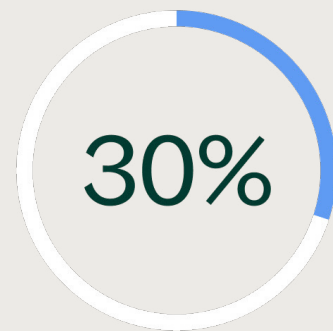
## Most-popular third-party online sources people check while searching for a new dentist



 Google Reviews



 Yelp



 Facebook



# Attracting new patient learnings

Actively attracting more patients begins with identifying who is most likely looking for a dentist. The average dental patient switches dentists every seven years, so you should always be prepared to appeal to potential switchers. **The Dandy Dental Study shows that you should focus your efforts on three specific groups:**

1. Patients under 35 years-old who are most likely unsettled
2. Patients older than 56 years-old whose dentists are retiring
3. Patients who are merely satisfied with their current dental care and can be won over by the promise of a pleasant personal experience.

The majority of all patients read reviews online, but you're most likely to reach younger patients (lifetime value) that way. If you're trying to draw older patients (~more procedures now), you'd be well-served by making sure your website features your practice's use of modern tech. True, your

practice simply won't be an option for people whose criteria for location, insurance, and the need for a specific procedure do not align with what you can offer. But of those who can attend your practice, most are drawn to conspicuous online indications of a pleasant experience from front-desk staff to doctors, especially on Google.

But how do you actively encourage reviews? That's tricky. "One of the most difficult things for a person at the front desk to do is ask for a review," Dr. Len Tau says. One solution he posits is changing the verbiage. "Get rid of the word 'review,'" he says. "Talk about 'feedback on the experience.'" Still, he acknowledges, this can be a tricky proposition. You're not legally or ethically allowed to incentivize patients to leave a review, but you can—and Dr. Tau says should—incentivize your team using positive-reinforcement. Creating what Dr. Tau calls "a reputation culture" means making sure that every team-member understands how important reviews are to the business as a whole, but also to them individually.

## Important information in online reviews

76%



of people looking at online reviews seek information on **location and insurance** in reviews

26%



look for signs of **modern dental technology**

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“When you have this reputation culture, you understand that you have to be on your best behavior and patients who come into the office are actually grading you on your performance. So if you recognize that, you ask those patients that had a really good experience to go home and provide feedback on their experience and write specifically about that team member. If you read the majority of reviews out there... the reviews say ‘the doctor and team were amazing,’ Or ‘the hygienist was amazing.’ They very rarely mention the actual name of the [caregiver]. So if you get that [patient] to write specifically about that team member and mention that team member’s name, you should incentive that person for getting that done, each and every time.”

The simplest way to grow your business is getting more patients through the door. And getting more patients through the door means making you attractive to anyone who types your name into a search engine. Having reviewed which groups are likely looking for a dentist, the factors influencing their choices, where they’re likely to search, and the importance of leveraging your internet presence, let’s shift our focus slightly by asking a question: once you’ve convinced patients to choose you, what will help keep them returning to your care and increase the lifetime value of your patient acquisition?

Once you’ve convinced patients to choose you, what will help keep them returning to your care and increase the lifetime value of your patient acquisition?



# Retaining existing patients

If you're convinced that your status quo would already earn top marks in patient satisfaction and there's no room for improvement, we can say with a high degree of confidence that you are A. ignoring an essential truth about statistics (that you are as unlikely to be an outlier as anyone else) B. making it that much easier for family, friends, and online recommenders to lure your patients to another practice, and C. missing a layup.

According to Dandy's findings, patients' feelings of being personally valued are highly correlated with overall satisfaction. The point bears repeating that the following are not merely suggestion-box comments, wish-list items, or even expert opinions, but data-based criteria: Ensuring that your office keeps timely appointments, consistently providing thorough explanations and instructions, properly setting expectations, the use of modern technology; and fostering a friendly, sympathetic culture from the front office to chairside manner all play integral roles in keeping patients in the rotation.

When it comes to nurturing a superstar customer-service office staff, both Drs. Spaulding and Bartusiak cite the same fast-food chain as inspiration, and one has even hired much of their office staff from seeing said chain on resumes. Yep, it is Chick-fil-A—strange but true. The reason? These doctors have both noticed a correlation between overall high staff morale, excellent level of customer service, and long lines of return customers.

Dr. Tau echoes their sentiment, going so far as to suggest hiring office staff from outside of the medical field altogether. "I would always be willing and able to [hire] somebody that doesn't have a

lot of dental experience, but they're really good at customer service." Dr. Tau tells us. "Bartenders, people who work the front desk at a hotel—they give great customer service and they'd be great people to train for an office because that's the kind of personality you want talking to your patients."

While hugely important, office culture, the survey tells us, is only part of the equation for retaining patients. Maintaining on-time appointments (i.e. reducing patient time in the waiting room) has the highest correlation with satisfaction of any non-procedure-specific dimension. You may have the nicest, most welcoming waiting room in the world but if you can't quickly get patients out of it and into the chair, they're likely to feel so dissatisfied that they'll seek care elsewhere. And this issue is ubiquitous. Fewer than half of respondents to the survey reported being 'very satisfied' with wait times, and 21% of respondents gave their current dentist a low rating (3 out of 5 or below) in this arena. Timely appointments are especially important to younger respondents; just 37% of Dandy Dental Study respondents younger than 36 give wait times at their current dentist top marks vs 44% of respondents 56 and older.

## Viewing these data in context with other findings underscores their importance on a few levels:

1. Patients need not be dissatisfied to switch if prompted by a great referral.
2. Younger patients are the demographic most likely to switch dentists.
3. Younger patients are more apt to write online reviews, which is a finding we'll discuss in further detail in a later section.

Maintaining on-time appointments has the highest correlation with satisfaction of any non-procedure-specific dimension.



Before moving on, we would be remiss if we didn't mention a somewhat thorny aspect of appointments: more convenient practice hours. Presently available data, many dental consultants, and your own experience will all tell you: patients want evening hours at least once a week, same or next day appointments, and availability on at least one day of the weekend. The Dandy Dental Study's data only underscores these points. According to our survey, 41% of respondents gave their current dentists low satisfaction scores on both limited evening and weekend hours. About half give their current dentist similarly low-marks when it comes to same or next-day appointments. Nourishing food for thought: Being on-time with an appointment is far more important than being available outside of banker's hours.

Another of the strongest practitioner-specific factors influencing patient satisfaction is thoroughness of explanation. Dentists with the highest possible scores for overall thoroughness of explanation and transparency enjoyed nearly double the satisfaction score as dentists with low scores on these same dimensions. In fact, 75% of our respondents have recommended a dentist with very high transparency and explanation.

Looking a little closer at the correlation between transparency and satisfaction, we see that 70% of respondents who gave top marks for being clear and transparent about procedure outcomes rated their dentist as 5 out of 5—the highest score. That same high satisfaction score was shared by 77% of dentists with the highest ratings in explaining the process, 79% of those who excelled in explaining why they recommended the procedure, and 60% of practitioners who were up-front about the level of discomfort a patient could expect. Dentists who scored just 3 out of 5 along those same indices saw the respective percentages of high satisfaction scores drop to single-digits.

## Correlation with patient satisfaction

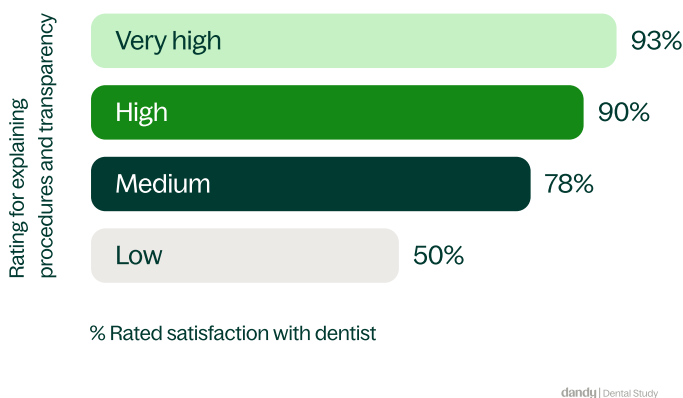


In addition to supplying information in the moment, sending detailed follow-up instructions post-visit is another area highly correlated with patient satisfaction. 58% of respondents to the survey gave top marks to dentists who sent them thorough follow-up instructions once they got home.

Transparency's importance is also seen in payment. 60% of Dandy Dental Study respondents could not be more satisfied with a dentist who was crystal clear about how much of a given procedure was covered by dental insurance, 68% were similarly satisfied with dentists who were transparent and honest about the total cost of their procedure, and about half of the most satisfied patients gave high scores for prioritizing treatment plans that gave patients options that fit within financial realities.

Adding further, an important dimension to the topic of transparency and thoroughness, the survey reveals that patients who received thorough explanations also tended to have more positive recollections of their procedure.

## Explaining procedures & patient satisfaction



Only 9% of dental patients seek a second opinion before a procedure

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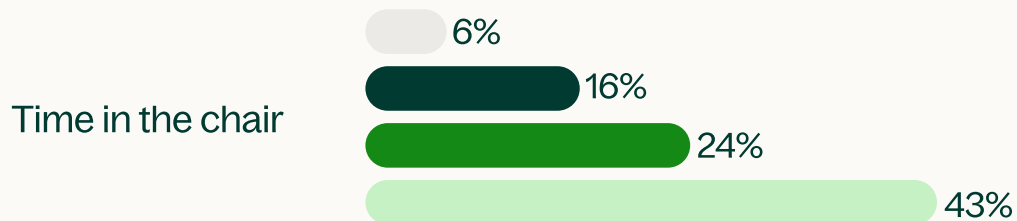
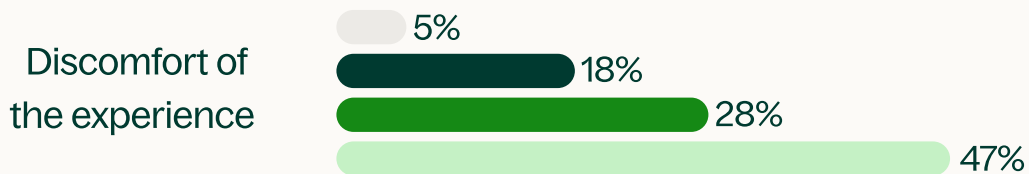
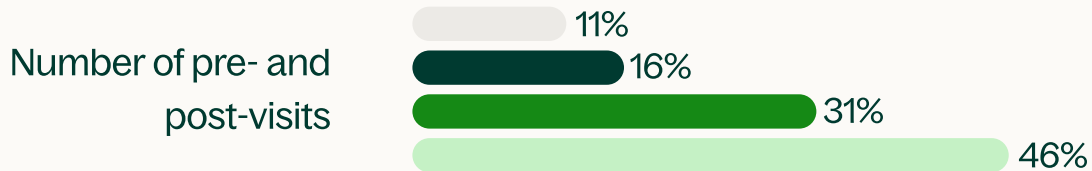
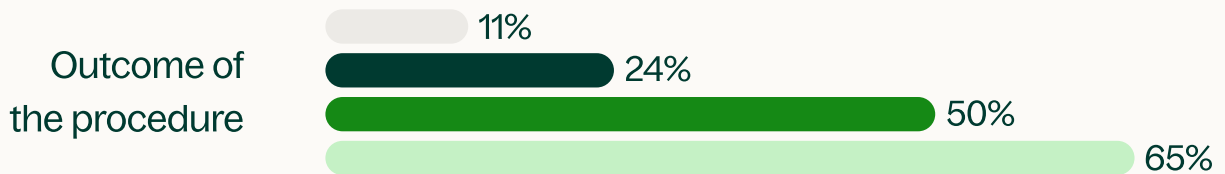
How do we know that the variable at issue is patient perception and not outcomes? The vast majority of patients who sought second-opinions didn't feel they benefited from the exercise. Of the 9% of all respondents who sought a second-opinion, fewer than 1 in 10 reported high satisfaction with their experience. In other words: of the patients who were unsatisfied with their original dentist's treatment plan, almost all were able to be convinced of the very same treatment by a new practitioner.

"Communicating with a patient is hugely important," says Dr. Tau. "An educated consumer will find value in what you're offering them, and they [are more likely to] purchase," he says, referring to both consumer tendency in general and dentistry patients specifically. But, he points out, patients don't know what they don't know, so even with the goal of edifying them, you run the risk of overloading a patient, so it's best to have a process in place. "Having inquisitive [office staff] answering the phones—basically asking some very important leading questions so you find out exactly what somebody is coming in for—makes that whole process [of edifying patients] much, much easier to do."

# Explaining procedures & expectations

% rated procedure was far better than expected for...

Transparency when rating procedure



Dentist's recommendations also play a huge role in completing both restorative and elective procedures. The survey findings tells us that nearly half of all restorative procedures take place because the patient knew something was wrong and needed to be addressed, about a third knew something was wrong but didn't realize the extent until seeing their dentist, and fewer than 1 out of 5 had no idea of how serious their case was until they were in the chair. But only about 1 in 5 patients thought about but had not seriously considered an elective procedure until a conversation with their dentist, **more than half of respondents were prompted for an elective procedure purely by their dentist's suggestion or recommendation.**

The mouth is one of the highest concentrations of nerve-endings in the human body; even the toughest patient may crumble when the anesthesia wears off. The survey makes it clear that, in their post-procedure state of anxiety, patients would much rather turn to follow-up instructions sent directly by their practitioner than Dr. Google (often your competition in mindscape).

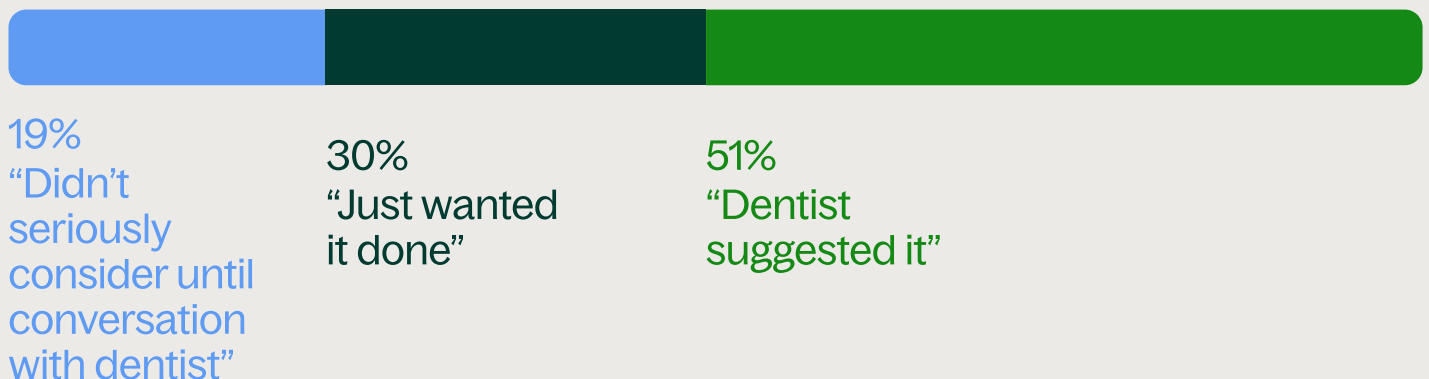
93% of patients who said their procedures were explained well rated their dentist 5-out-of-5.



75% of people who rate their dentist very highly have recommended the practice.

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## What prompts elective dental procedures



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# Digital dentistry

The final variable at highest correlation with patient satisfaction is your practice's use of modern technology. Even with a 46% correlation with the highest possible satisfaction rating, only 27% of respondents' dentists used an intraoral scanner like Dandy dental practice partners—this represents a clear opportunity for growth. With only 17% of all respondents giving low marks to their dentist for use of modern technology, it should be obvious that adoption of new technology and conspicuous advertisement of that thoroughly modern fact are materially important to patients—not just in time-saving or patient comfort, but in accuracy, and demonstration of scientific advancement within the field. This is a trend that will only increase over time as intraoral scanner technology is the new standard. Dr. Spaulding relates her patients' reactions to the speed and detail of digital scans showing their bite, crowding, even color of their teeth. "What I wasn't expecting [with digital dentistry] is every single patient having an extremely positive reaction. Most people say, 'I've never seen anything like this before—this is so advanced.'"

The survey reveals that modern tech is especially important to older (i.e. more reliable in the long term) patients. This demographic tended to search online reviews for keywords related to specific procedures more than younger patients (48% and 29%, respectively). This is likely related to the procedures a practice offers and the older group's higher average number of procedures completed over their lifetimes.



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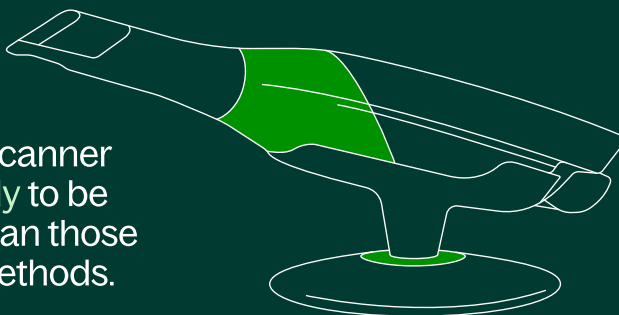
Dr. Bartusiak relates a story of a patient in her 60s experiencing his Dandy-supplied scanner for the first time. She was so impressed and amazed by the experience that she asked if she could take pictures and send them to her family and friends because she knew their dentists weren't using this amazing tech. "Seven out of 10 patients are putting [their Dandy scan] on social media or sending it to their friends," Dr. Bartusiaks says, citing metrics from a third-party service his practice utilizes. "Our internal referrals went up 15% just because we got Dandy. It has been an accelerator for growth. It has kept us on the forefront of the technological boom that is taking place across all industries." And beyond attracting new patients through shareable images, Dandy's precision has made Dr. Bartusiak's practice more efficient overall, which helps set him apart from his competitors. "My first 98 crowns [made through Dandy] that I put in, I didn't make one adjustment... that's almost unheard of... the shade was correct, the bite was correct, the patient was happy, everything went."

**In summary, retaining your current patients means increasing overall patient experience.**

The Dandy Dental Study: Patient Experience has highlighted several aspects as significant drivers of patient satisfaction overall: reducing time in the waiting room, taking time with patients to give thorough explanations and set expectations, sending patients home with detailed follow-up instructions, suggesting elective procedures, and highlighting the use of modern technology. The data tells us that meaningfully addressing any one of these aspects of your practice will increase overall satisfaction and keep patients returning to your care. But addressing all of these dimensions is statistically very likely to make your practice stand out as a leader in patient care.

## Going digital

Practices with a scanner are 12% more likely to be recommended than those with traditional methods.



Patients who experienced the digital scanner perceived to have "less time in the chair" than expected to those who had traditional impressions.

# # of chair visits better than expected

Digital Scanner



Traditional Impression



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# Likelihood to recommend

Digital Scanner



Traditional Impression



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# Patient dissatisfaction

To now, we've spent most of our time elucidating which aspects of dental practice drive satisfaction. But in this section we will go over countervailing forces: reasons patients leave their dentist's care. We've touched a bit on some of these earlier, but it's worthwhile to give you the full picture as described by the Dandy Dental Study. We'll be covering the two main facets of attrition: reasons patients proactively leave, and the unavoidable.



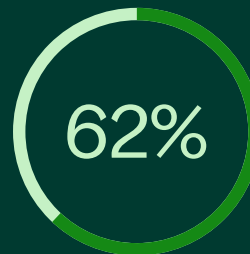
## There's an old saying: confused consumers don't make a decision.

When it comes to preventable drivers of dissatisfaction, as previously mentioned, nearly a quarter of all patients sought a new dentist due to a poor experience. What constitutes a poor experience? We don't have a definitive definition, but reported poor experience leading to a switch were associated with 35% of low transparency scores and 27% of low satisfaction scores—a plurality of both. If we break down satisfaction into factors we know to have high correlations and infer the inverse, we can conclude that poor experiences are most likely the result of long wait times, rude or inattentive staff, and/or outdated technology. With respect to the latter factor, Dr. Bartusiak tends to agree.

"There's an old saying: confused consumers don't make a decision. The person who says, 'I'm gonna go home and think about it.' Well they're not pacing the floor right now, they've moved on," he says. "If I don't show [patients] what we're doing, if they don't get a chance to look at it, feel it, and experience it [through a platform like Dandy's], it doesn't mean anything to them, there's no inherent value."

The point is that a less-than-stellar score in any one of those dimensions may be flagged as the locus of a poor experience, but low scores across the board almost certainly guarantee a lost patient.

In this context, the point is worth repeating: a patient need not feel all that dissatisfied to switch dentists and fewer than half of all respondents rated overall satisfaction with their dentist as a 5 out of 5. According to the survey, a great referral will still cause 14% of all patients to look for a new dentist, including 22% of the respondents who rated satisfaction with their dentist 5 out of 5. Further, 68% of all survey respondents who rated their dentist 4 out of 5 or below still search review sites for the words "Nice, friendly, caring, helpful, kind, patient, understanding."



of patients who have switched dentists did so because of poor experience and transparency.

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Sometimes, losing patient isn't related to satisfaction at all. Sometimes there's simply nothing you can do. To wit: 28% of survey respondents sought a new dentist because they moved, 22% experienced a change in their dental insurance, and 9% needed a procedure their current dentist doesn't offer. This, Dr. Spaulding tells us, is simply part of the business. "It's hard to gauge, so if someone's really upset at an office, I feel like you'd really have to be doing something wrong... Most attrition for us is due to people moving. If they have an insurance concern, it's usually addressed before they come in the door... [attrition] generally comes down to money, which is also a completely logical reason to switch."

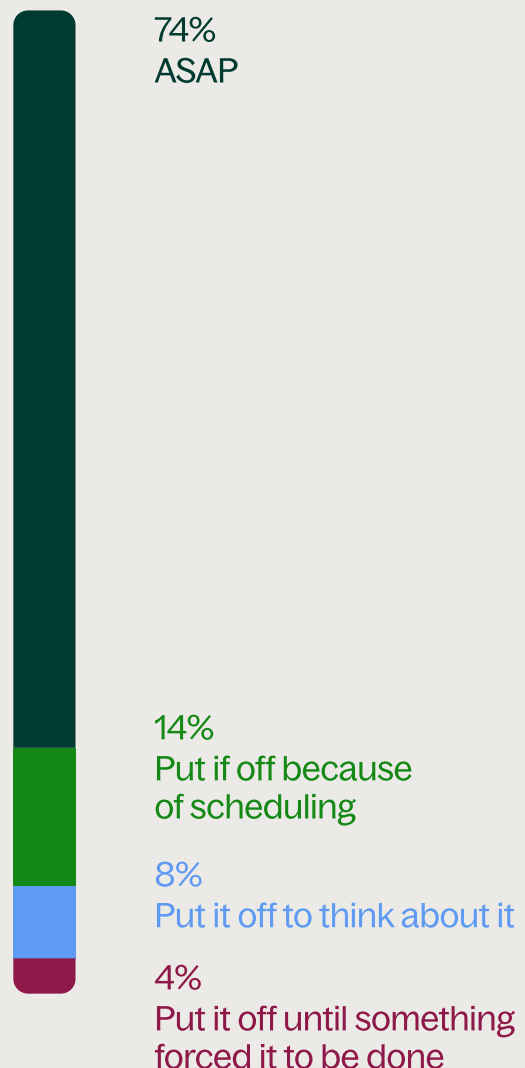
In the end, there's not much you can do for departing patients other than wish them well, and considering the importance of online reviews, we'd say it's worthwhile to do so. There is another unavoidable reason you and every single other dental practice will lose patients—one statistic that we didn't need the findings to tell us: 100% of both doctors and patients will eventually die. What's unclear is whether dental care is offered or even necessary in the undiscovered country from whose bourn no traveler returns. Dentists may be wizards, but they're not mediums. *Sorry, trying to add some levity.* That said, if you are looking for a new location, setting up shop in the area of a soon-to-be retiring dentist is a shrewd play.

The facts of patient dissatisfaction and attrition should not scare you, but sober you to reality. The survey shows: you can be the most accurate diagnostician and expert doctor and a certain number of patients will still leave you for perceived greener pastures.

However worrying about the other practice(s) down the street should be more based on patient experience than shopping around after care recommendations. As we stated early only 9% seek a second opinion and if only a quarter don't follow-up immediately that is a good baseline metric to follow.

The learnings also show that improvement is well in hand for anyone paying close enough attention. Maintaining the highest possible standards of friendliness, striving for thoroughness and transparency, keeping abreast of technology, and monitoring your online presence will all buffer you against bad outcomes. Even if you believe yourself to be doing your utmost already, the next section will deal with how you can gauge your performance and why it's so important to do so.

## How quickly a dental procedure was done



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# Recommendations for patient experience

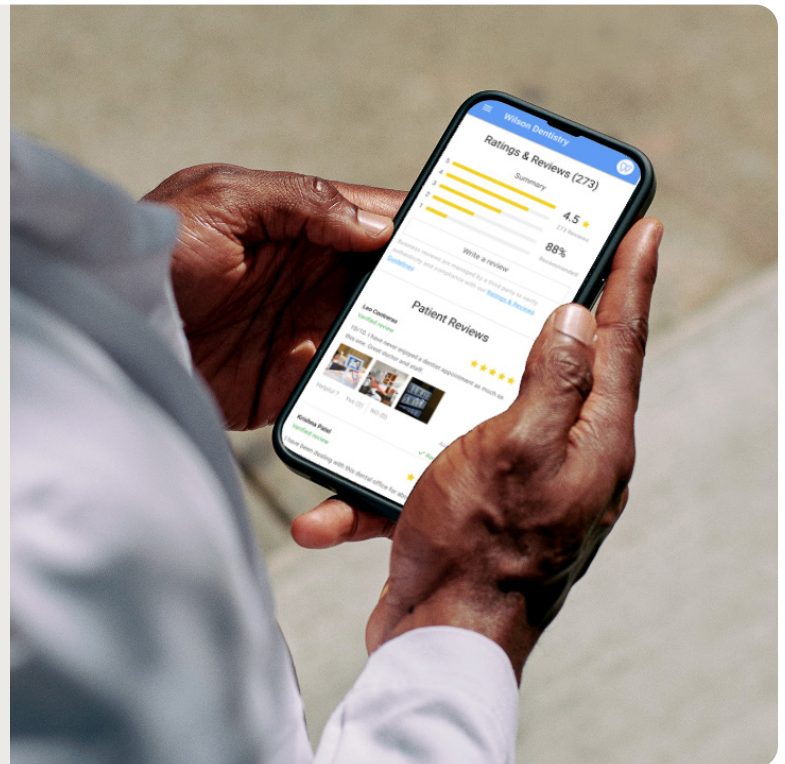
So far we've covered who is likely looking for a dentist, what attracts new patients, drivers of patient satisfaction, how to keep patients returning to your practice, as well as dissatisfaction and unavoidable attrition. In this final section, we're going to talk about some of the ways you can gauge your performance and the most effective means of harnessing high patient satisfaction to maximum benefit.

You already know the power of a good referral, but did you know that 14% of patients were prompted to look for a new dentist by a great referral from family or a friend? With over half of survey respondents reporting that they have recommended their current dentist to a friend, colleague, or family member, it's safe to say that referrals are instrumental to growing your business.

Curiously, even though consumers who are "very satisfied" with their dentist are more likely to recommend them (79%) they are only slightly more likely to post an online review (26%). With 77% of Dandy Dental Study respondents in the market for a new dentist visiting a practice's website and 59% of those liking to see reviews posted, it may surprise you to learn that, according to our discovery, a total of only 1 in 5 respondents posts an online review—even if they're completely satisfied. And while it is certainly not carte blanche to dismiss them, try not to get hung up on bad reviews. Only about 11% of all dentist reviews are negative and just 5% of consumers search for them. "There's no perfect business out there," Dr. Tau says. "If you have a couple negative reviews, that makes you look imperfect, which makes you perfect."



There's no perfect business out there," Dr. Tau says. "If you have a couple negative reviews, that makes you look imperfect, which makes you perfect."



So what precisely you should be featuring on your website? Before we answer this, let's look at patients' priorities. 72% placed "specific services and procedures offered" in their top three most important features of a dental practice, with 54% putting it in the top two, making it the most precious concern of many potential patients. The second most important factor for a dentist's online presence appears to be patient reviews, with 59% of respondents placing that factor in their top three priorities. Rounding out the most important info you should feature on your site is staff degrees and certifications with 26% of respondents placing that in their top three. On the other side of the spectrum, The Dandy Dental Study identifies that the least important factors overall for a practice's website as ranked by consumers are: links to social media channels, a focus on children, and online registration for new patients, with just 1%, 3%, and 5% of respondents placing those factors in their top three, respectively.

"Once [dentists] understand the value that reviews have for their practice, not only from the credibility perspective but from the visibility perspective... the more pressure we put on practices to get within the 21st-century and look more credible online—it's the most important thing we can be doing," says Dr. Tau. "Review generation or what we call now, 'listing management' [the practice of ensuring that your name, phone number, and general information are consistent and accurate across online platforms] are two of the most foundational things you would have to be doing prior to doing anything else for your practice. If you're a brand-new startup practice with literally zero reviews, you are not a credible practice," he says. "Even if you have 10 reviews, you look more credible than zero...these are foundational things to ensure you're driving new patients to your practice because patients aren't going to come in if you don't look credible online."

**It's clear that cultivating and managing your online presence alone will give your practice a competitive advantage.**

If we combine what we've already established about the groups you should be targeting with the data above, we can create a formula (of sorts) for what should be featured on your site.

Some combination and/or permutation of:

- + Reviews praising your office's friendly/caring demeanor
- + Emphasis on timely appointments
- + References to your staff's degrees and certifications
- + Highlights of your thorough explanations and overall transparency
- + Conspicuous indications of your utilizing modern technology

# Conclusion

The Dandy Dental Study represents a sea change in data-based customer service in the dentistry field. Our data has shown how often consumers attend the dentist, the methods they use to pay, and which procedures they most often endure. We've identified who is most likely looking for a dentist, which aspects of a dental practice are attractive to whom, where consumers are reading online reviews and what they look for when they do. We've shown which aspects of your practice have strong correlations with patient satisfaction; the importance of transparency, clarity, expectation-setting, and thoroughness; who seeks second-opinions, what aspects of chairside manner are of material concern, and the degree to which use of modern technology matters. We've identified which elements drive dissatisfaction, the reasons patients proactively leave, what constitutes a poor experience, and reasons for unavoidable attrition. Finally, we've driven home the importance of your online presence, and given you data-based strategies for gauging satisfaction and prompting referrals and reviews.



If I hear my patients laughing, if I hear my staff laughing, **we've won.**

Much of what we've covered can be summed up by Dr. Bartusiak, who says laughter is his main KPI. "It's not case acceptance or number of patients, it's laughter," Dr. Bartusiak says. "If I hear my patients laughing, if I hear my staff laughing, we've won."

## Last time switched dentists

% of respondents



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At Dandy, we know that whether you're a small-town general dentist or dental influencer to the stars, you strive to do the utmost for your patients. Behind every number we've portrayed, there are real people bringing their experiences to bear; nothing is designed to steer you in every particular direction, but to present you with clear paths. We began this discussion with a basic premise: data-driven insights into what patients care about most can help facilitate your business' growth. But said another way: you're in the business of caring for people, and if you can find out what matters to them and apply it, business will be good. Overall the goal is better smiles for your patients, bigger smiles on you and your staff.



# Enhance your patient experience

If you are looking to partner with an end-to-end digital solution partner, please inquire about how Dandy can elevate your patient experience by contacting [sales@meetdandy.com](mailto:sales@meetdandy.com)

