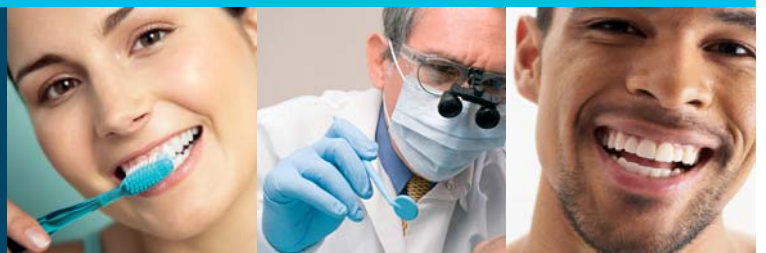


annual national dental health survey

April 2011

THE DENTAL PEOPLE
OASIS



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This is the third year of our Annual National Dental Health Survey¹, which we use to understand a patient's perspective of dentistry in the UK.

The headlines in this year's report are:-

- An encouraging increase in the number of people claiming to have a dentist, with increased access to NHS services
- The recession is affecting everybody. Even though access is increasing, large numbers of patients are cancelling or postponing treatment to save costs. We believe this is putting patients' long-term dental health at risk.
- There are still 5 million people in the UK who haven't been to the dentist in the last 10 years.
- There is strong evidence from our survey that, alongside NHS dentistry, patients want access to private services – either exclusively or as an add-on to the current NHS provision
- There are some interesting regional variations – Londoners are more likely to have a private dentist, more likely to have had cosmetic dental treatment, but are less frequent visitors.
- DIY dentistry is still out there – almost 200,000 people have tried to treat themselves.
- Our survey shows an increasing interest in aesthetic dental procedures, especially amongst younger people.
- Cheryl Cole has the UK's nicest smile – and Kate Middleton was at # 3 in the rankings, just behind Nigella Lawson.



The survey also found that patients still have a low awareness of treatment options available to them and suggests that the traditionally strong loyalty that exists between patients and their dentists is slowly starting to ebb away.

For more information please contact the Oasis Dental Care press office on **0161 236 2277** or email oasis@eurorscg.com

¹ The National Dental Survey collects the views of a nationally representative sample of over 2,000 adults aged over 16 across the UK. The survey is conducted by an independent UK market research agency

04

access to dentistry and patient choice

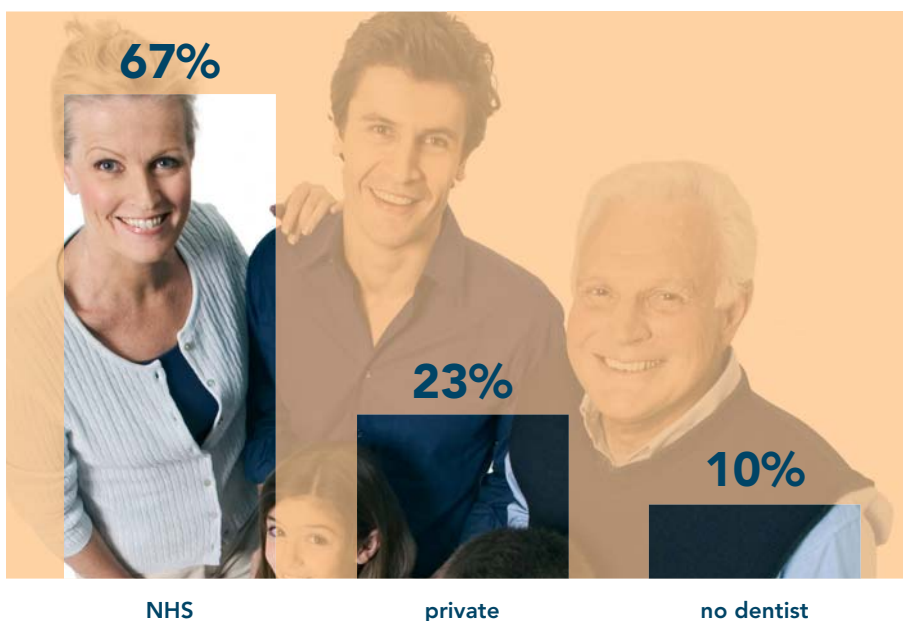
As a leading dental provider in the UK, Oasis is working to improve access to dental services, opening up new practices throughout the country.

The 2011 survey shows that access to NHS dentistry across the country continues to improve: this year, 67% of UK adults have an NHS dentist, a 3% increase on last year and a further increase on the year before.

We found that the West Midlands had the highest number of patients with an NHS dentist, at 72%, and Northern Ireland had the lowest number at 60%. Northern Ireland is an area where Oasis has been particularly active in the past year, opening 15 new state of the art practices in the region and providing thousands of new national health places.

Whilst NHS dentistry remains the more popular choice, our survey also underlines the importance of providing private dentistry in building access to dental services – 23% of UK patients have a private dentist, a figure which rises to 29% in London and 27% in the South East.

Interestingly, a quarter of NHS patients have chosen to supplement their treatment with some form of private treatment, a figure which rises significantly in the South East of the country where 39% of Londoners who have an NHS dentist have chosen to take up some form of private service. The most popular private treatments which NHS patients choose to pay for are crowns, white fillings and tooth whitening.

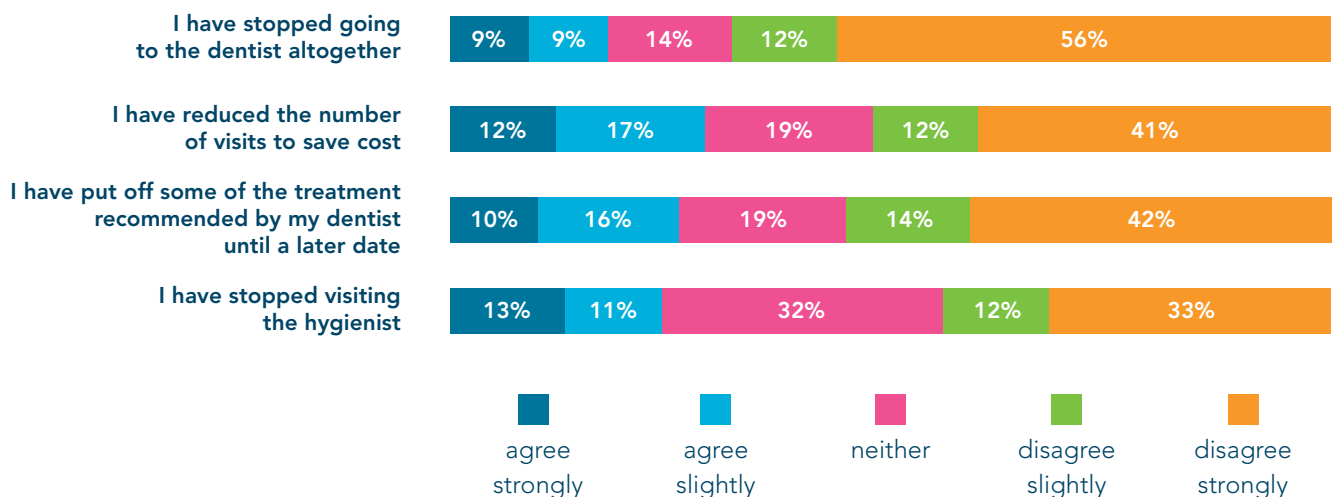


Whilst we are pleased to note the increase in patients with access to a dentist, it is clear that there is still work to be done since almost 5 million adults still claim to have no dentist at all.

At Oasis, we continue to work with the government, trialling new approaches, to help shape the future of UK dentistry.

the effects of the recession

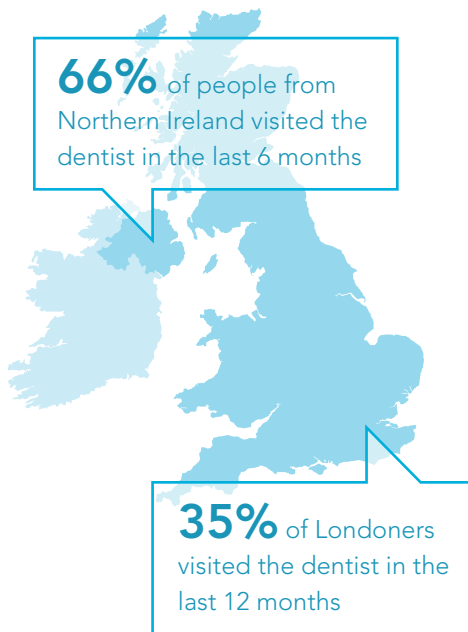
Whilst access is improving, the current recession is having a worrying effect on the nation's dental health. 17% of UK adults said that in the last year they had stopped going to the dentist altogether, and up to 28% said that they had either reduced the number of visits to the dentist or had put off some of the treatment recommended by their dentist. This is a worrying trend since it is our view that this is a false economy and puts at risk their long-term oral health.



NHS patients are more likely than private patients to have stopped going to the dentist altogether. Private patients are more likely to have cut down on visits or treatments.

06

frequency of visits



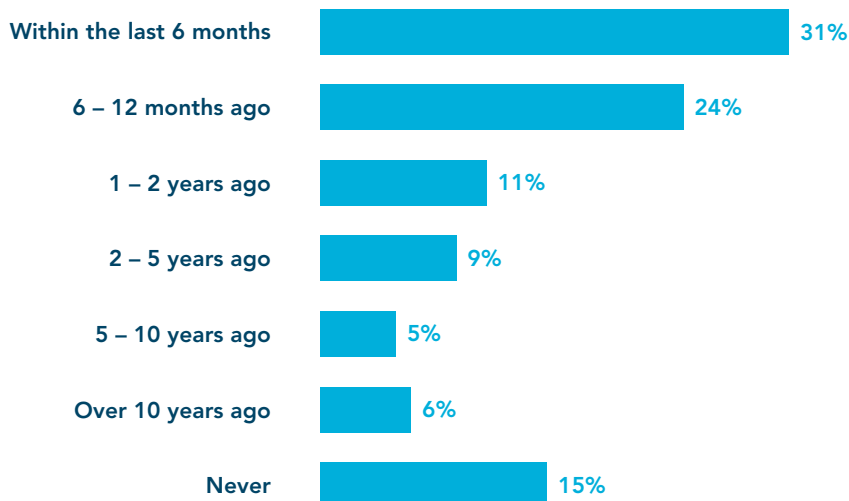
Whilst we found that the recession is having an effect on dental visits and the take up of treatment, still just under half (46%) of the UK population had managed to visit their dentist in the last six months. Women (49%) are much better than men (43%) at regular attendance and the region with the highest amount of people who had visited the dentist in the last six months was Northern Ireland at 66%; this has increased from 57% last year. This rise in frequency may be a reflection of the increased NHS availability within Northern Ireland over the past year.

At the other end of the scale, Londoners had the lowest percentage of people who had been to the dentist in the last 12 months at 35%.

However, we also found that 8% of adults across the UK had not been to the dentist for more than 10 years!

There is still a lot of opportunity to improve overall oral health by encouraging greater use of hygienists – 15% of patients said they had never visited the hygienist and only 31% of people had visited a hygienist in the past six months, a decrease from 33% last year – which could also be a reflection of tightening purse strings throughout the recession since 24% of adults said they had stopped visiting the hygienist in the last year.

Patients were asked when did you last visit your / a hygienist?



07.1

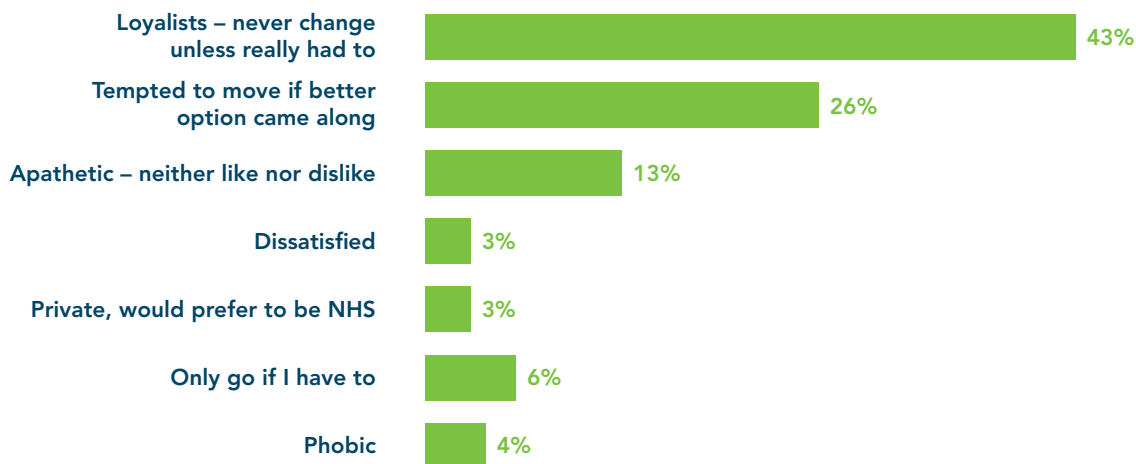
a decline in patient loyalty?

Each year, our survey highlights the strong loyalty that exists between a patient and their dentist.

In this year's survey 43% of people said that they were loyal to their current dentist and would not change unless they really had to.

Patients in Scotland and the North of England are most loyal, with 55% and 52% of patients in those regions citing themselves as 'loyalists'. The least loyal patients seem to be in London and the South East of England (34% and 36% respectively).

Patients were asked how they feel about the relationship they have with their dentist



There was further evidence in our survey of this bond between patients and their dentist:-

- When asked how long ago it was since last changing their dentist, we found that incredibly, 22% had never changed dentist, and 60% had been with their dentist for over 5 years or more.
- only 7% of adults told us that they were either dissatisfied or not particularly happy with their dentist and would like to move.

However, we found some evidence that this bond may not be as strong as it seems. There is a surprising lack of willingness to complain about bad experiences – just under half the people we spoke to (44%) informed us that they had a bad experience with their dentist or dental practice at some time in the past, with experiences ranging from painful treatment, perceived bad job, being handled roughly, being kept waiting for too long, and rude/impolite dentists and dental teams. However, of these 44%, almost half of them did nothing about it. More worrying for dentists is the fact that the majority of the rest simply left the practice to find another dentist without registering any form of complaint.

07.2

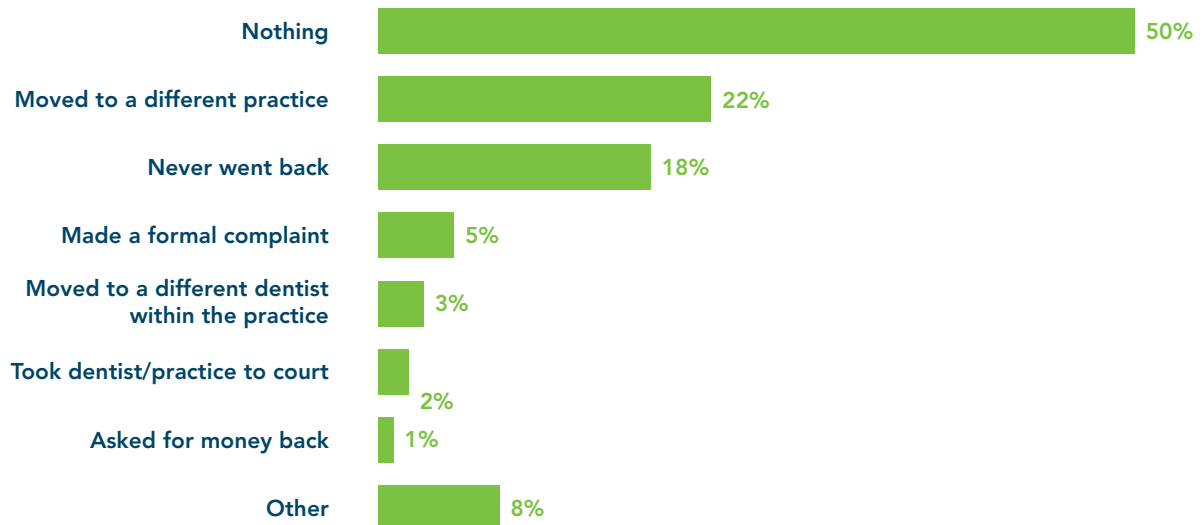
a decline in patient loyalty? (continued)

We have also seen a decline in overall levels of loyalty.



- Last year we were informed that 47% of people would not change dentist unless they really had to. This has dropped to 43% in this year's survey and just over a quarter (27%) of our survey said that they feel that they are certain or likely to change their dentist in future.
- There is a growing generational split: only 35% of 16 to 24 year olds identify themselves as 'loyal' to their dentist, compared to 56% in 55 to 64 year olds. Perhaps our younger generations are more selective, driven by the wide array of choices available in our community today.
- The traditional reliance on taking our dentist's advice seems to be breaking down too, with over a third of adults claiming to use the internet to research treatments online before deciding on a course of treatment – this applies equally to NHS and private patients.
- In this year's survey, we found that 28% of patients said that they would 'shop around' for different prices for treatments (a figure which rose to 40% in London).

Patients were asked what did they do as a result of their bad experience?



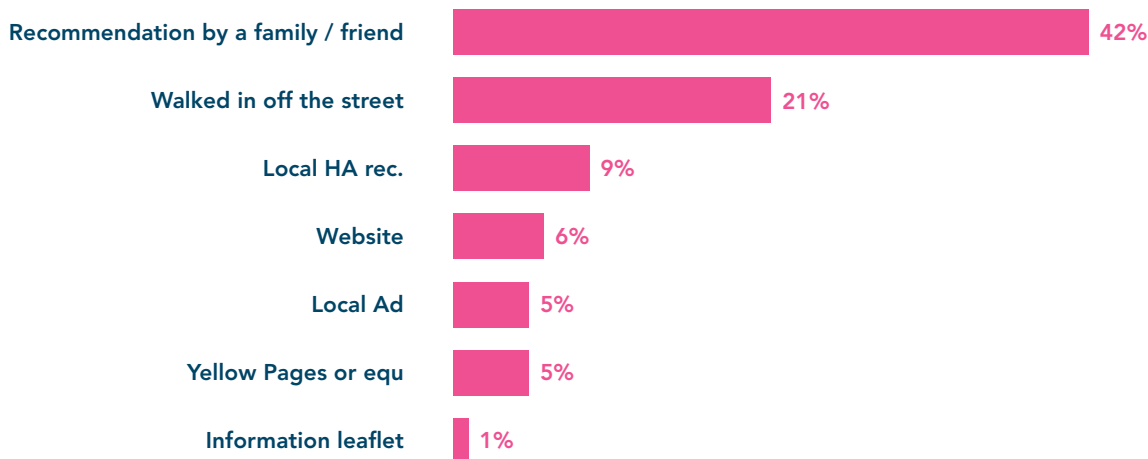
is it time to focus on customer service?



With the increasing willingness of patients to shop around and the decline in levels of loyalty, we would expect to see a change in patients' attitudes to their dentist so the time is right, we would suggest, for dentists to look carefully at the level of 'service' they offer their patients. Indeed, looking after your patients is crucial since they seem to be a dentist's most valuable marketing resource.

When choosing a new dentist, people tend to draw on the experiences and perceptions of friends and family, with 42% of people asking for their dental recommendations, rather than relying on websites, leaflets or yellow pages, (only 17% of people choose their new dentist through these channels). This advocacy is more prominent in Northern Ireland, where 53% of people have chosen their dentist through word of mouth. However, only 60% of patients said that they would definitely recommend their dentist to a friend.

Patients were asked how did you find out about your current dentist?



So what does the dentist need to focus on?

The most important factors mentioned in this year's survey when asked what patients look for when changing a dentist were:-

- the quality of treatment,
- convenience of location
- cleanliness of the practice
- friendliness of dentists and staff
- clarity of treatment costs.



70% of women said they felt anxious before sitting in the chair.

One of the most concerning statistics in our survey is the fact that 24% of all UK adults claim to currently have some degree of tooth pain or discomfort... but are presumably too scared to do something about it!

Dentists still have much to do to ensure their patients are more relaxed in the dental chair – we saw a year on year decrease in the number of patients who claim to have no nerves before visiting the dentist, from 39% last year to 35% this year.

60% of men suffer from nerves before a visit to the dentist, while 70% of women said they felt anxious before sitting in the chair.

Scottish patients are the toughest, with 41% of people claiming not to experience any nerves at all.

Of those who experience fear, most people are scared of the sound of the drill more than any actual pain (15% versus 14%).

It seems that open communication and friendliness are key to helping patients feel relaxed – being welcoming, talking and explaining what is happening.

Patients were asked what if anything do your dentist or their staff do to make you feel more relaxed at your visit?

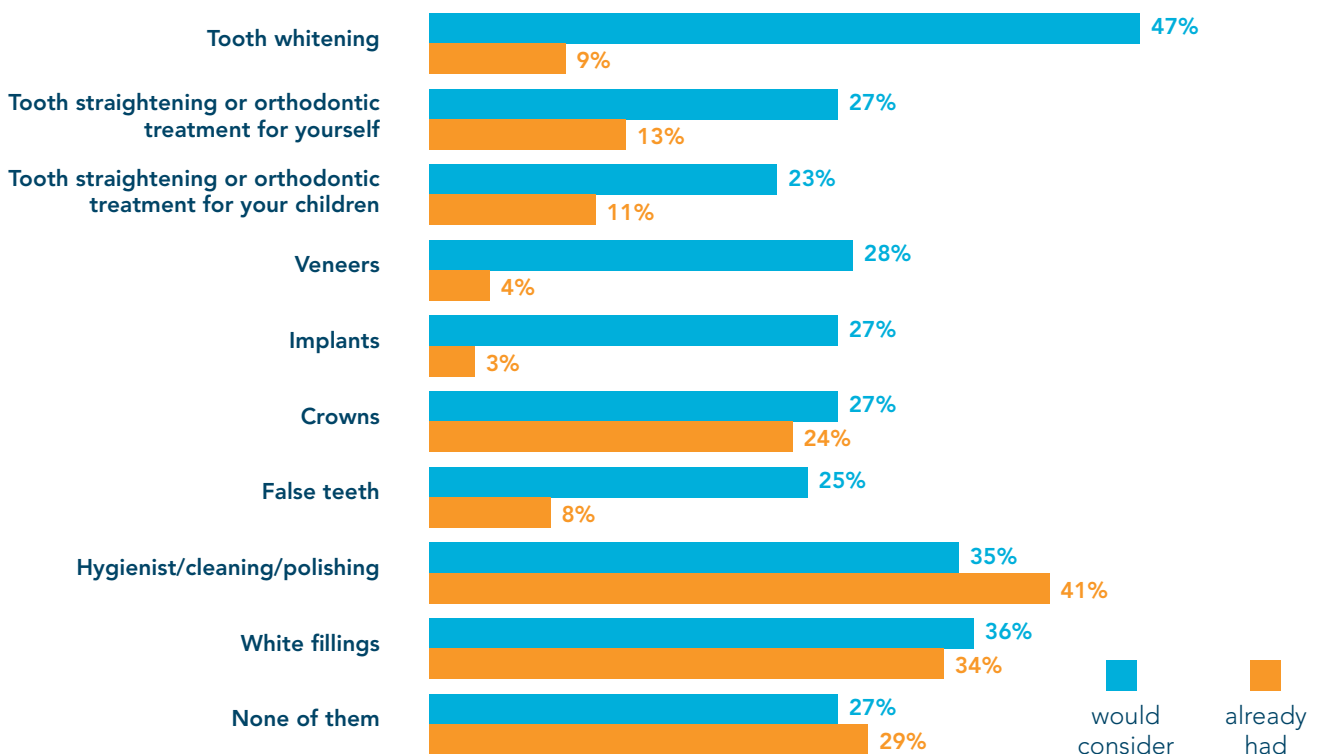


a prediction of future growth in aesthetic treatments



30% of UK adults say they are unhappy with the appearance of their teeth. As we become more conscious about our image in today's society, the prospect of aesthetic treatments is becoming more desirable... tooth whitening, orthodontic work, veneers and implants all show small numbers of patients having already had these treatments, but a large number of patients considering them in future. The most aspiring treatment seems to be teeth whitening – 47% of people told us they would consider having their teeth whitened, whereas only 9% have actually had this treatment. Interest was greatest amongst the younger age groups with 12% of 25-34 year olds having had the procedure. Males appear to be the most image conscious among us, and are more likely to have whitened their teeth than women.

Patients were asked which treatments would they consider in the future or have you already had?



It seems that whilst patients understand most of the 'general' treatments available at their dental practice, there is much less clarity around the more specialist treatments such as veneers and implants, with 13% of people saying they had never even heard of them. If this growing interest is to be realised, this lack of understanding is clearly an issue dentists need to address.

do we brush up well?

For years we have been told to brush our teeth at least twice a day – 92% of people brush their teeth in the morning – but this means that 8% don't! Men are the biggest offenders – 12% don't brush their teeth in the morning, whereas only 5% of women fail to get rid of that morning breath!

Patients were asked to state whether they agreed or disagreed with the following statements



Two thirds of people (63%) still use a manual toothbrush.

At bedtime, however, the picture is much worse. Whilst 49% of us admit to sometimes forgetting to brush our teeth before bed, an amazing 23% of fail to brush before bed at all! Men, again, are the worst culprits at 26%. The West Midlands is the worst region of all with 29% – so watch out before you give anyone in Birmingham a goodnight kiss...

Before we all get too comfortable, it is worth pointing out that 18% of people agree that some days they do not brush their teeth at all, rising to 31% in Northern Ireland.

In spite of the advice from our dentists, 41% of people haven't changed their toothbrush, or toothbrush head, for three months or more. And whilst dentists have recommended electric toothbrushes for many years, two thirds of people (63%) still use a manual toothbrush. 16-24 year olds are least likely to use an electric toothbrush (18%) – strange for the iPod generation!

People in the capital place greater importance on their smile as 15% of people there said a nice smile was more important than their qualifications. 4% of people think that having a nice smile is more important than their partner – rising to 9% for Londoners!

15%

think a smile is more important than their qualifications
(London)

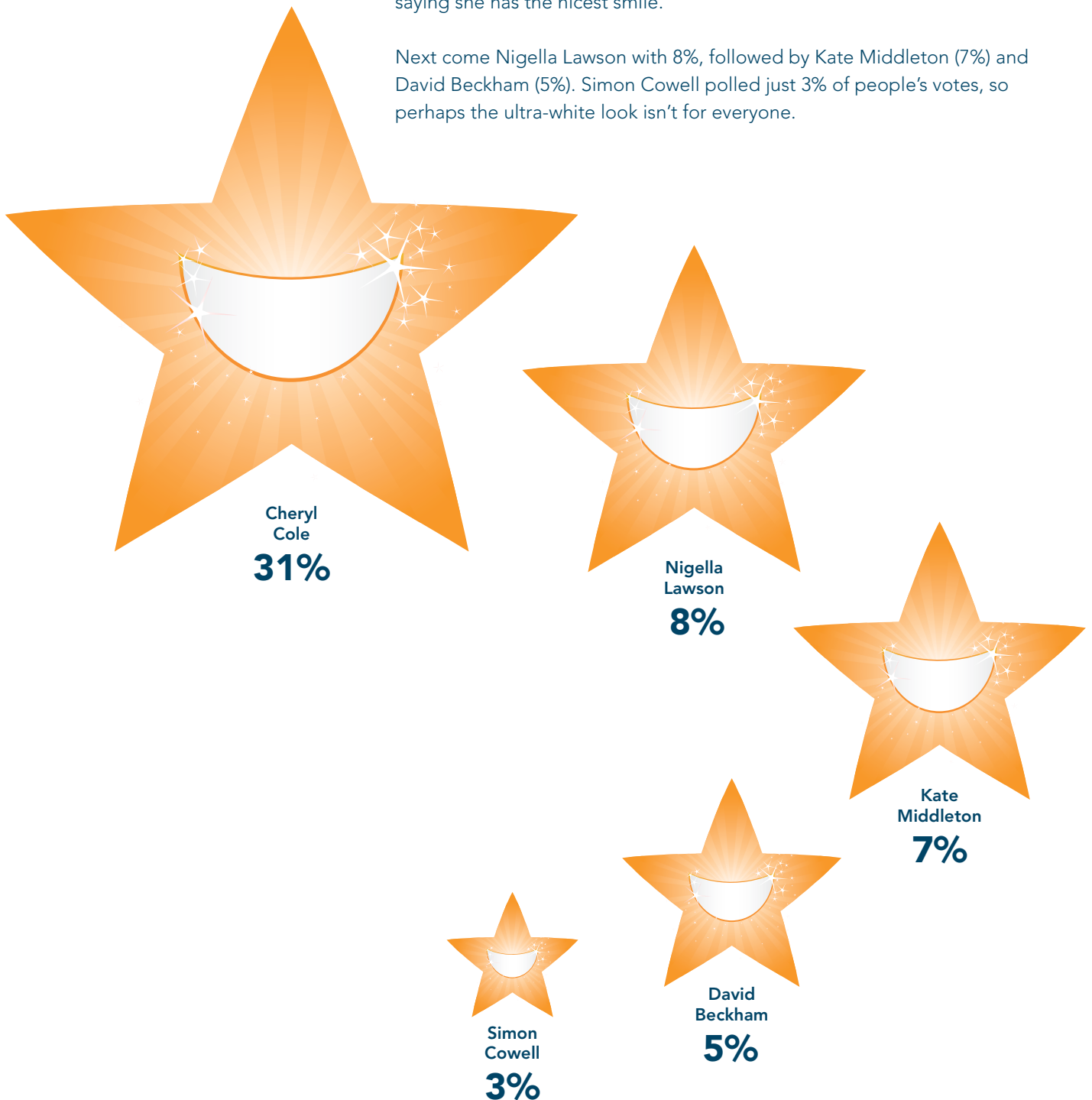
**4%**

think a smile is more important than their partner



Cheryl Cole is the UK's tooth idol by a big margin, with 31% of people saying she has the nicest smile.

Next come Nigella Lawson with 8%, followed by Kate Middleton (7%) and David Beckham (5%). Simon Cowell polled just 3% of people's votes, so perhaps the ultra-white look isn't for everyone.





The independent research for Oasis's National Dental Health Survey 2011, was carried out for Oasis Dental Care by TNS, a world leader in market research.

The survey of patients took place between 27th January and 7th February 2011 among a nationally and regionally representative sample of 2241 adults aged over 16.



Our vision is to transform dentistry in the UK by creating the national dentistry brand of choice for patients, staff and dentists, through the provision of patient focussed, high quality NHS, private and specialist dental treatment.

Oasis Dental Care is the leading operator of NHS and private dental practices in the UK. It is a wholly-owned subsidiary of Oasis Healthcare Ltd, backed by Duke Street.

Oasis has undertaken a period of rapid growth since it was established in 1996. In just over 10 years, we have expanded from 4 practices to 200 practices throughout England, Wales and Northern Ireland.

Today, we deliver our services with over 800 dentists to almost 2 million patients. As a people focused organisation, we are committed to ensuring that our patients receive quality clinical care.

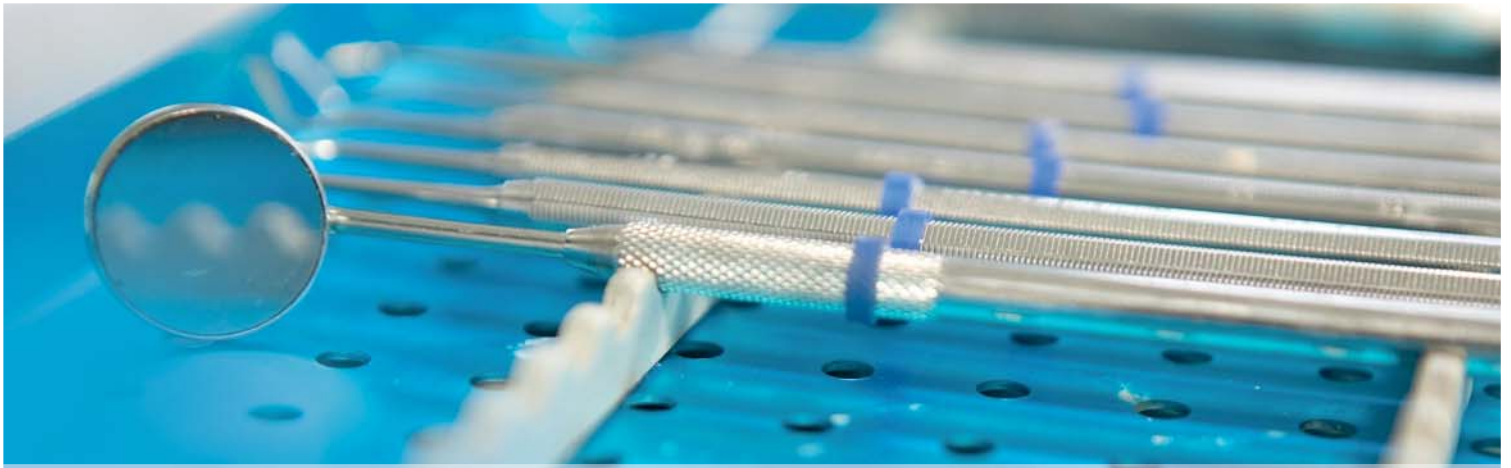
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We recognise the importance of driving and rewarding high quality dental care, promoting preventive treatment and expanding the role of dentistry to drive broad public health benefits across the UK population.

Our national scale allows the support and supervision of high clinical standards and improves access to innovation and continuous professional development for our dentists and dental staff.

We are currently investing in new facilities, upgrading our existing practices and acquiring quality practices to join the Oasis estate.

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