



Consumer
Attitudes
Towards
Dentistry
Survey
2011



Denplan

At the heart of dental care

About Denplan

Twenty-five years ago two dentists wanted to offer patients an alternative to NHS dentistry that not only supported preventive dental care but also offered a choice of affordable quality treatments. They created a system that simplified administration within the dental practice and allowed dentists to spend more time with their patients, focusing on preventive oral healthcare and providing a choice of modern techniques. So in 1986, the first dental payment plan/capitation was born. (Interestingly enough, the current government recently announced its intention to introduce

the capitation approach to NHS dentistry, basing payment on outcomes not treatments.)

Since then, UK dentistry has undergone something of a transformation, yet the role of the dental payment plan remains the same; offering patients a choice of dentist, a choice of treatments and a choice of plans to help spread the cost of their dentistry through affordable monthly payments, while simplifying administration for practices to enable dentists to spend more time with their patients.

For a quarter of a century Denplan has continued to lead and inform the profession and as the UK's leading dental payment plan specialist has over 6,500 member dentists treating approximately 1.8 million patients nationwide.

Steve Gates,
Denplan Managing Director

Steve joined Denplan in 1995 and became Managing Director in 2001. He is responsible for the strategic direction and growth of all Denplan activities, focussing on new products and business development. For the past eight years Denplan has been ranked in the top 25 of the Times Top 100 Best Companies to Work For and Steve himself was awarded Most Inspirational Leader in 2009.

For interview or comment from Steve, please contact the Denplan Press Office on **01962 827997** or email PressOffice@denplan.co.uk



Introduction

The following report presents findings from independent research conducted by YouGov on behalf of Denplan Ltd, highlighting the views of UK consumers about their dentistry. It is the eleventh year Denplan has surveyed consumer opinion with the objective of monitoring attitudes and identifying trends*.

With a general election under its belt and a host of political promises made to set the UK's dentistry to rights, what do consumers' think and feel about their oral healthcare at the start of 2011?

- Has the current economic climate affected the way consumers feel about their dental care?
- NHS or Private?
- What trends are emerging and what does the future look like?

About this survey

The following results highlight consumers' attitudes towards dentistry in the UK currently and the key findings are presented for your attention in this comprehensive report.

- Total sample size was 3106 adults
- Research was undertaken in January and February 2011 online
- The figures have been weighted and are representative of all UK adults (aged 18+)
- All Nov 2009 and 2011 figures referenced are from YouGov Plc

Survey Overview

The last few years have been turbulent ones for the dental profession to say the least, with changes in the NHS Dental Contract and major new regulations dentists must comply with. But despite these factors and the economic climate, attendance figures are up on our previous Consumer Attitudes Survey.

As a dentist I find it particularly heartening to learn that an increasing number of patients recognise the benefits of preventive care; that by taking greater care of their teeth and gums and attending their dentist regularly, they can reduce the need for costly treatments and save money. Minimal Intervention (MI) dentistry is the foundation on which Denplan was built; by enabling a patient and their dentist to focus on regular care, and by minimising risk factors before they cause pain and require treatment.

Roger Matthews

MA BDS DGDGP (UK) FDSRCS(Edin)
Chief Dental Officer, Denplan



Key survey results:

- Attendance* is up to 78%†, a rise of 3 percentage points since 2009
- 47%† of consumers surveyed say they visit the dentist every 6 months, an increase from 43% in 2009.
- 17% of respondents say they are now going to the dentist regularly in an attempt to avoid having to pay for dental treatment.
- 12% without a payment plan said they would consider purchasing a dental plan to help with dental costs.

Roger joined Denplan in 1995 having spent 20 years working in general dental practice and as a dento-legal advisor for the Medical Defence Union. He oversees dental advice to the company and its links with professional bodies, and is responsible for Denplan's Professional Services.

"Many people don't realise that dental decay is one of the most common chronic diseases in the world. It can have a huge effect on general overall health and yet it is entirely preventable, which is why it is so important that patients prioritise their oral health."

Preventive dentistry has always been at the heart of Denplan's philosophy, due to the fact that a payment plan enables a patient and their dentist to focus on regular care, the prevention of decay and minimising associated risk factors, rather than being concerned with unexpected cost implications."

For interview or comment from Roger, please contact the Denplan Press Office on **01962 827997** or email PressOffice@denplan.co.uk

* Consumers visiting the dentist at least once every 2 years, in line with NICE guidelines (National Institute for Health and Clinical Excellence)

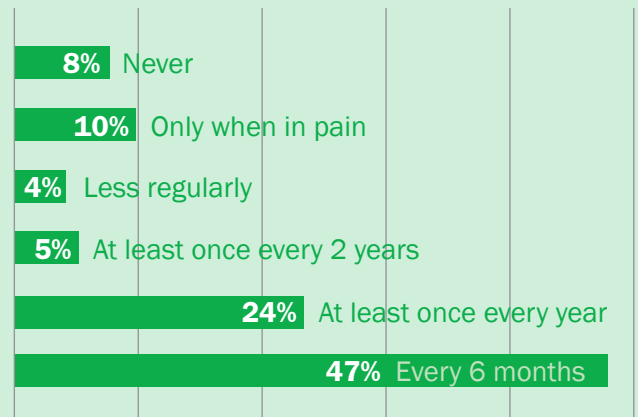
† The 2009 Adult Dental Health Survey findings show similar results: 50% of adults attended the dentist at least once every six months and 77% attended once every two years. The 2009 Adult Dental Health Survey (ADHS) published on 24 March was commissioned by the NHS Information Centre for health and social care. The survey was carried out in England, Wales and Northern Ireland only: Scotland did not participate in the 2009 survey.

What consumers think about their oral health:

Changes in attendance

Attending the dentist regularly is widely acknowledged as an important part of a balanced healthy lifestyle; in these tougher economic times, does this still remain a matter of priority for people?

Interestingly, our survey shows that more people now than in our last survey in November 2009 say they visit the dentist regularly with 77% of UK adults now saying they visit the dentist at least once in every 2 years, an increase from 75%. 47% of respondents say they go every 6 months which has increased from 43% in 2009.



Patterns of attendance 2011

This suggests that even in tougher economic times consumers are still prioritising their dental health. However, this is still down on the peaks of over 80% regular attendance in 2006/7.

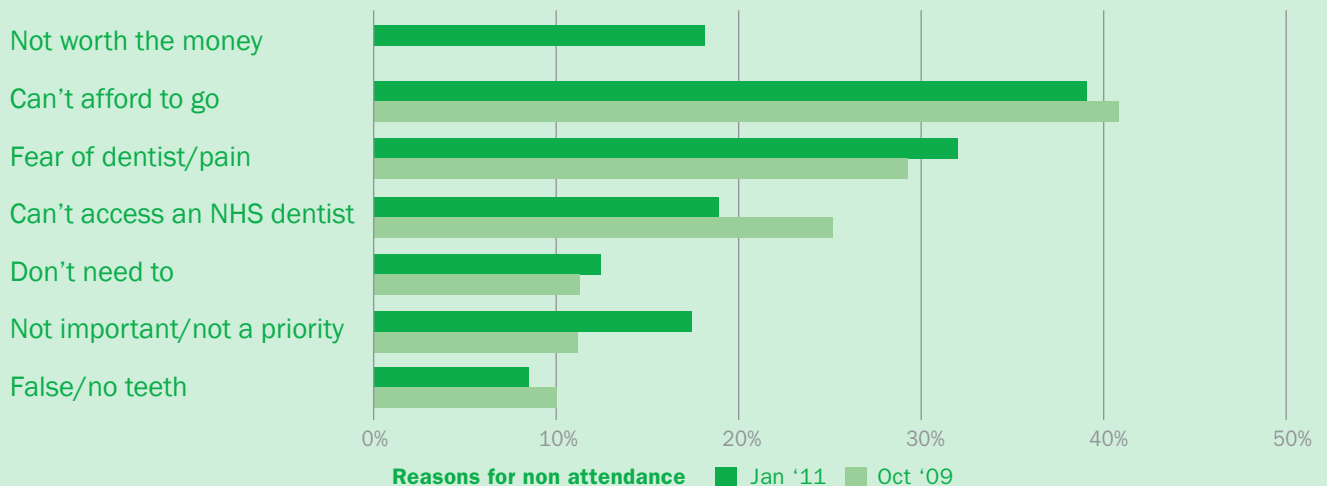
Why people don't attend

It is clear from our survey that affordability is still a major issue, with 39% of those surveyed stating it the main reason for non attendance. Fear of the dentist or fear of pain came in second at 33% of those surveyed, an increase of 4 percentage points from 2009.

The third reason, 'I don't need to', reflects a continuing and surprising failure to appreciate

the growing evidence for links between good oral health and good overall health.

Interestingly, the proportion of consumers who say they don't go to the dentist because they can't find an NHS dentist has fallen from 25% to 18% over the past two years. This reflects an increase of NHS dentistry and suggests that patients are happy with their existing private care.



Has the current economic climate affected the way consumers feel about their dental care?

Implications regarding cost of dental care

When it comes to funding for dental care, we're very lucky in this country to have a choice. However, when it comes to costs, apart from those receiving benefits, the majority of patients pay at the point of treatment – whether private or NHS care is provided.

56% of private patients and 67% of NHS patients 'pay as they go': they do not have a payment or insurance plan or say they are exempt from payment.

Our survey shows that cost is more important for NHS patients than for private patients when choosing the dentist they visit (49% compared to 38% of those surveyed respectively), whereas private patients are more likely to prioritise quality and service elements of their dentistry, such as good customer service and the reputation of the practice.

Over half (55%) of the respondents who visit an NHS dentist say the reason they do so is because they can't afford private treatment, yet of those NHS patients who have been referred for private treatment, 40% comment that private care was better than NHS care.

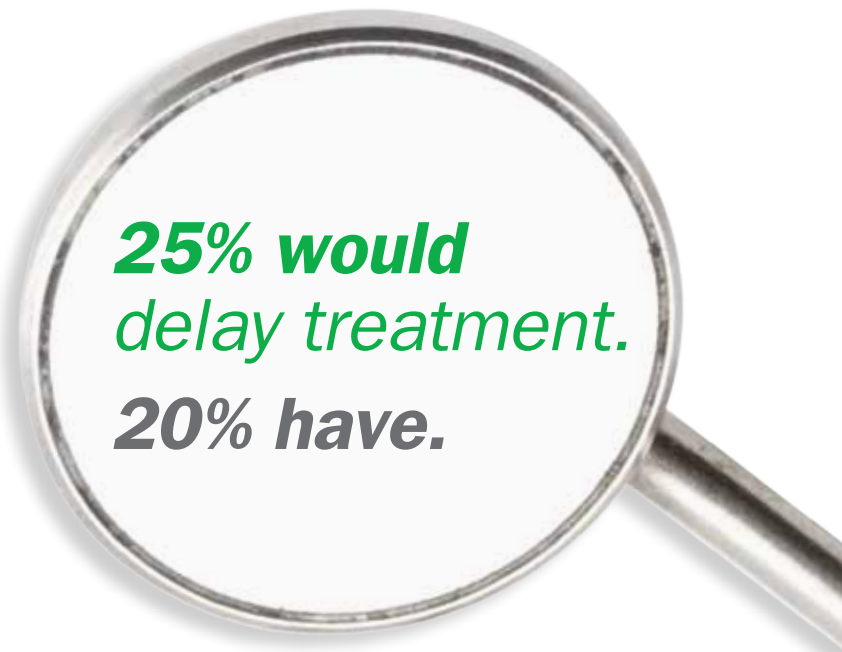
There is a belief amongst a significant minority of NHS patients that private care is better, yet unaffordable to them. This may indicate the importance of educating consumers about the benefits of payment plans and how they can help in budgeting through affordable monthly payments, avoiding unexpected treatment costs and opening up a wider choice of treatments outside those available within the NHS.

While 39% of those who don't visit the dentist for routine check-ups say they are not going due to concerns about cost, it is worth noting that in the current economic climate, 17% of all respondents say they are now going to the

dentist regularly in an attempt to reduce the risk of potential costly treatments developing. In conclusion, this suggests that not only are consumers interested in managing their finances, but it also leads us to believe that there is better understanding that a 'minimal intervention' approach to dentistry doesn't cost more, but saves you money in the longer term. However, this view is not yet widely appreciated.

Economic climate affecting UK's oral health

25% of those respondents who visit the dentist regularly said that in the current economic climate they would delay an appointment and 20% have already done so; and 23% of this group have delayed treatment following diagnosis. 12% would or have delayed treatment for more than 6 months.



**25% would
delay treatment.
20% have.**

Our survey also showed evidence of demand for payment plans to help with dental costs. 12% of consumers surveyed said they would consider a payment plan to help with dental costs and over 81% of those who would consider a plan said the price of a payment plan would be the most important factor in their choice.

NHS or Private?

Much of the recent debate surrounding private versus NHS dentistry is as a result of the changes to dental provision instigated by the April 2006 NHS Dental Contract. This based dentists' pay on output – 'Units of Dental Activity'.

Although our findings suggest increases in attendance, the debate in the media continues to centre around whether NHS cost restraints will affect future provision of NHS dental services and the impact of proposed cost increases for NHS treatments.

Over 60% of those surveyed agreed that there are issues regarding access to NHS dentistry at the moment and 24% said that either they or their family had been affected by a lack of NHS dental care in their local area over the past 2 years. As a result of this, over 30% of this group have stopped visiting the dentist altogether.

Conversely, there is ongoing consumer debate about the satisfaction with dental services delivered and differentiating between NHS and private care.

*Overall, our survey shows satisfaction with care and treatment is high across all service provision with **88%** of regular dental attenders indicating satisfaction.*

However, payment plan patients are the happiest with the services received with 58% being 'very satisfied'.

Of those patients who pay privately for their dentistry, the main reasons given for doing so tend to be practical; for example 36% said they wanted to stay with an existing dentist. This evidence suggests that many consumers have a strong sense of loyalty to their family dentist and would prefer to go private rather than have to find a new dentist altogether.



Private dentistry – a choice rather than a consequence

Our survey shows regional variations in the proportion of patients citing a lack of NHS dentistry as the reason for paying privately for their dental care. One of the key regional findings is that despite having the highest proportion of private patients, London has by far the lowest percentage citing a lack of NHS care (22%).

This suggests that private dentistry in London is far more a choice than a consequence and that a lack of NHS care in some areas may no longer be an issue. So it's fair to conclude that many patients are opting for private dentistry out of choice, not because they are unable to find an NHS dentist.

The key question then is what is encouraging people to choose private care?

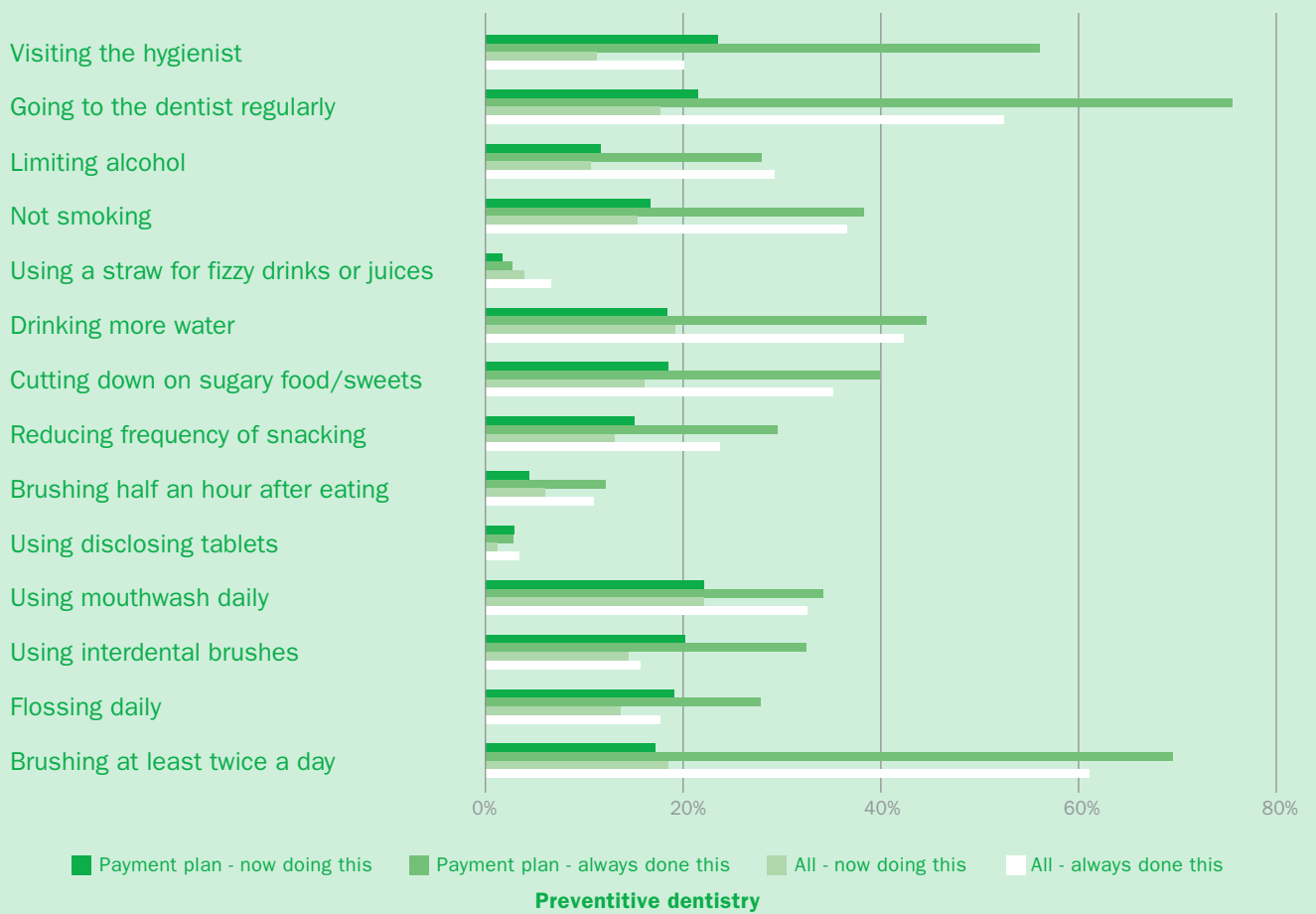
- Is the increasing popularity of dental payment plans influencing consumers to make the choice to move to private dentistry?
- Are consumers displaying more insight when it comes to budgeting for their dental care?
- Are payment plans providing a better option for consumers, giving them access to a wider choice of modern treatments?

It would appear that some respondents are looking to be more proactive about their dental health and recognise that a payment plan enables them to do that, by encouraging and enabling preventive care and treatment without concern over cost implications. In fact, of those surveyed, 12% without a payment plan said they would consider purchasing a dental plan to help with dental costs.

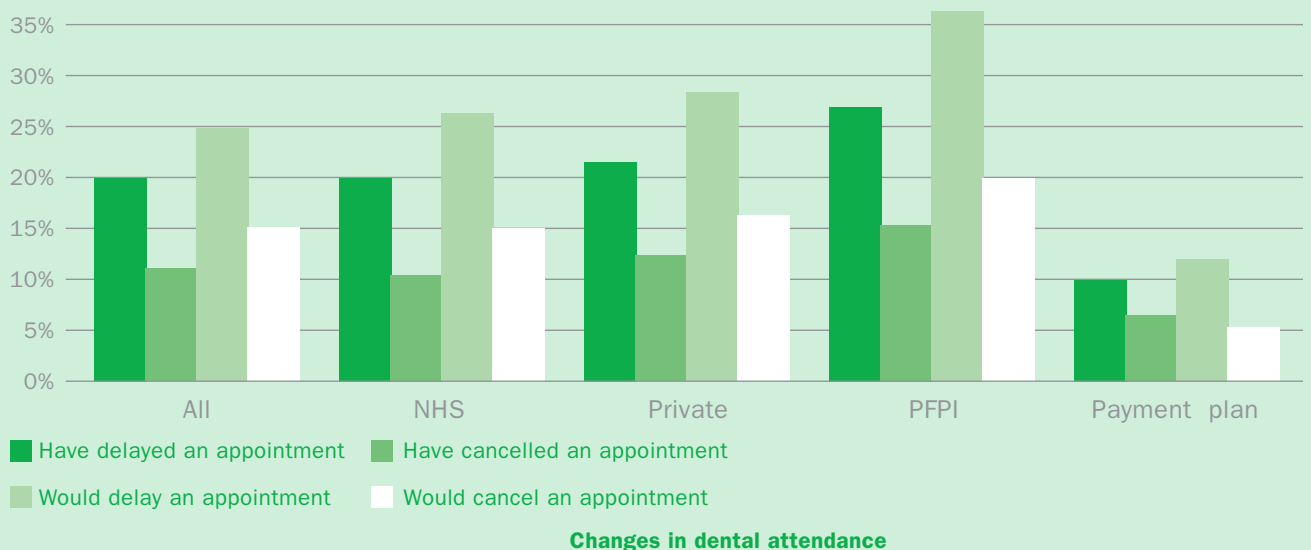
Our survey shows that 21% of payment plan holders are now taking more preventive care to try and avoid dental treatments.

In general, payment plan patients are more likely to always have taken preventive measures to avoid dental treatments than consumers generally, illustrating the benefit of the time built into appointments by payment plan dentists to allow for preventive education and advice.





Our survey also provides evidence that of those regular attenders, payment plan patients are least likely to delay or cancel an appointment due to current economic conditions.



What trends are emerging and what does the future look like?

Preventive care and attitudes towards oral hygiene

It is perhaps no surprise that the recession and economic climate has had some impact on consumers' behaviour. Our survey shows that, in the current climate, on average 1 in 5 respondents are taking more responsibility for maintaining their teeth and gums by using mouthwash (22%), drinking more water (19%), brushing at least twice a day (18%), as well as going to the dentist regularly (17%).

The majority of respondents (85%) agree that good oral health supports overall well being. Conversely, however, only a minority are now using or always have used disclosing tablets (1%), interdental brushes (14%) or floss daily (12%), suggesting that many simple, yet effective oral hygiene routines are being ignored – indicating that the majority of people are not yet taking responsibility for the up-keep of their teeth.

1 in 5 respondents are now doing something to improve their preventive care.

Our survey provides evidence that although consumers understand good oral health is important, among some people there appears to be little sense of prioritising consistent dental care. Many consumers still don't realise that tooth decay is almost entirely preventable and so there is most certainly a job for the

dental team as well as Denplan to do in raising awareness and educating consumers about preventive care and the benefits this has on overall health as well as expenditure.

The importance of 'smile'

Over 30% of the survey respondents said that the main reason for attending the dentist was to keep a good smile.

Whether it's the influence of the Hollywood smile or the X-Factor beam, over 30% of the survey respondents said that the main reason for attending the dentist was to keep a good smile.

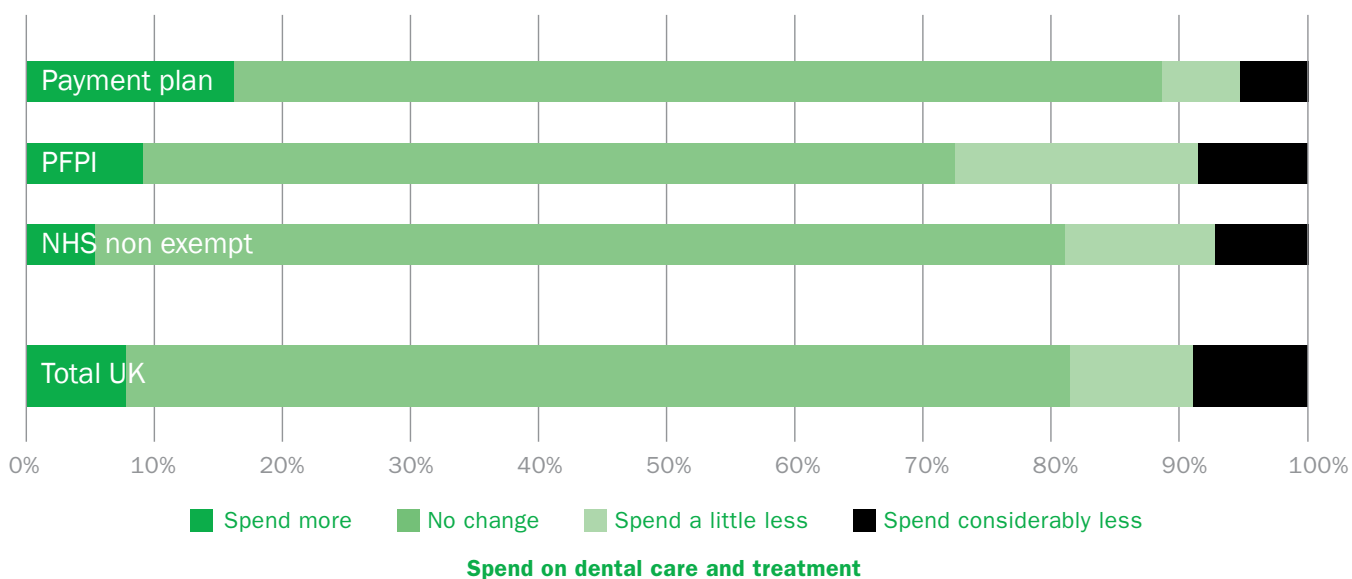
However, a 'perfect smile' does not mean that teeth and gums are healthy. The results indicate a lack of understanding and perhaps a naivety about the main reason for looking after your teeth and the importance of regular attendance at dental appointments.

One thing this does tell us is that increasingly consumers' teeth and their smile are being considered a priority in terms of beauty and aesthetics and that many consumers are prepared to spend money on maintaining an attractive smile and teeth.

Dental costs and trends

The majority of those surveyed agree that the costs of dental care and treatments are rising. In total, patients who pay for their dental care say they spend on average £112 per annum. Irregular attendees suggest they spend more significant sums (at £124 per annum), suggesting that non attendance is a false economy. A better understanding of the costs of dental check-ups may actually encourage attendance amongst those who say they can't afford to go to the dentist.

The majority of respondents (70%) do not anticipate changing how much they spend on dental care and treatments in the current economic climate, although almost 1 in 5 (compared with nearly 1 in 10 in 2009) are spending less, with only 7% likely to spend more in 2011. These results would indicate that the economic climate is potentially impacting the dental care of many consumers and that the importance of good oral health needs to be continuously highlighted.



Appendix

NHS dental charges in England from 1 April 2011

Band 1 course of treatment – £17.00. This covers an examination, diagnosis (eg X-rays), advice on how to prevent future problems, a scale and polish if needed, and application of fluoride varnish or fissure sealant.

Band 2 course of treatment – £47.00. This covers everything listed in Band 1 above, plus any further treatment such as fillings, root canal work or if your dentist needs to take out one or more of your teeth.

Band 3 course of treatment – £204.00. This covers everything listed in Bands 1 and 2 above, plus crowns, dentures and bridges.

Denplan: Average monthly fees

Dental payment plans arranged by Denplan are designed to be used proactively, supporting the preventive approach to oral healthcare through regular check-ups and treatment. Following assessment by a Denplan dentist, patients will pay a fixed monthly fee based on the condition of their teeth and gums. This will provide them with regular examinations, hygienist visit and restorative treatments depending on which plan they choose.

For example;

Average monthly fee for Denplan Care in February 2011 was **£19.99**

Average monthly fee for Denplan Essentials in February 2011 was **£12.24**

	Denplan Care	Denplan Essentials	Membership Plan	Plans for Children
Supplementary Insurance	✓	✓	✓	✓
Check-ups	✓	✓	✗	✓
Hygiene treatment including scale and polish	✓	✓	✗	✓
Dental x-rays	✓	✓	✗	✓
Preventive dental advice	✓	✓	✓	✓
Necessary Fillings	✓	✗	✗	Ask your dentist
Periodontal (gum) Treatment	✓	✗	✗	Ask your dentist
Bridgework (excluding lab treatment)	✓	✗	✗	Ask your dentist
Root Canal Treatment	✓	✗	✗	Ask your dentist
Crowns (excluding lab treatment)	✓	✗	✗	✗
Dentures (excluding lab treatment)	✓	✗	✗	✗
Discounts on additional private fee-per-item treatment	Ask your dentist	Ask your dentist	Ask your dentist	Ask your dentist

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