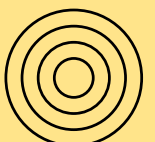


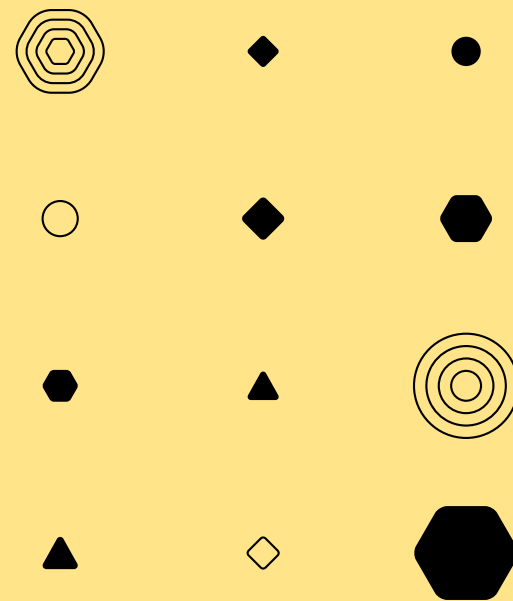
Business Support

Patient Profiling



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This workbook looks at patient profiling which is essential before you put together any business or marketing activity plan. It provides a detailed understanding of new and existing patients, giving you the knowledge to target, acquire and develop profitable patient relationships.

Dental Business Consultant name:

Tel:

Email:

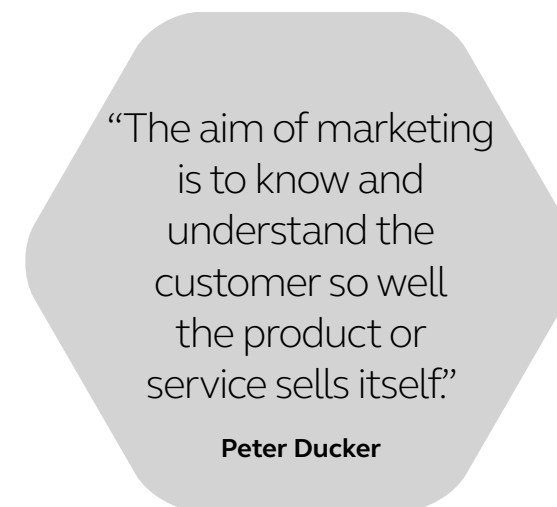
PSA name:

Tel: 0800 328 3223**

Email: psas@denplan.co.uk

Denplan Training: 0800 587 5533**

Email: eventsandtraining@denplan.co.uk



“The aim of marketing is to know and understand the customer so well the product or service sells itself.”

Peter Ducker

And remember,
if there’s anything at all that you need some extra help with just call your Consultant or Practice Support Advisor (PSA)

** Lines are open from 8:30am to 5:30pm on Monday to Thursday and from 8:30am to 5:00pm on Friday.

Introduction

Throughout the series of the Business Support workbooks we have referred to patient profiling – particularly in those concerned with marketing and business planning. In this workbook we explain what it is, why you need it and how to use it.

What is a patient profile report?

Patient profiling use Acorn, the customer profiling tool from CACI Ltd. “Acorn is a geodemographic* segmentation of the UK’s population. It segments households, postcodes and neighbourhoods into six categories, 18 groups and 62 types. By analysing significant social factors and population behaviour, it provides precise information and an in-depth understanding of the different types of people”. CACI Limited 2013.

Through postcodes, Acorn uses information from the Land Registry, Registers of Scotland, commercial sources of information on age of residents, ethnicity profiles, benefits data, population density and data on social housing and other rental property. They also use the census and large-volume lifestyle surveys.

***The definition of geodemographic is the study and grouping of the people in a geographical area according to socioeconomic criteria.**

What will you get from your profile report?

The report helps you gain a real insight and have a deeper understanding of your patients’ lifestyle, behaviour and attitudes. You can use this knowledge to target and recruit new patients, develop relationships with your existing patients and tailor the services you offer more accurately.

You can use it to evaluate the local market and focus on the specific needs of the area you are in.

The data collected from your patient profile report can be compared to the whole UK population to help put all profiles into perspective.

Why do you need a your profile report?

Although there are many reasons why a patient profile report could be useful for your practice it’s absolutely essential information to have before thinking about how you will market your practice. It will give you a greater understanding of who your existing and potential patients are so that you can target your promotional activities more accurately. This not only saves money but time and effort.

Each report is bespoke, but the report will show the:

- Demographics of your Denplan patients
- Demographics of the population in a study area surrounding your practice (typically within a specified short driving time around the practice)
- Demographics of all Denplan patients in the postcode area in which your practice is located
- Demographics of your private fee-per-item or NHS patients, if relevant (you will need to provide Denplan with this patient data)

***The definition of demographics is the study of a population based on factors such as age, race, sex, economic status, level of education, income level and employment, among others. Demographics are used by both governments and commercial organisations to learn more about a population’s characteristics for many purposes, including policy development and business planning.**

The data is also compared to the whole UK population, to put all profiles into perspective.

Use the report to ...

- **Offer the right services.** You can have a better idea of the services and treatments you could offer, knowing what type of people your current and potential patients are
- **Find the best place to relocate or open a new practice.** A report shows the profile of the population in the immediate area around a practice (see **Opening a practice from scratch MSS 1164**)
- **Use as a business case to demonstrate value of your patients.** Knowing the profile of your patients can show the value of your practice to, say, your bank to help raise funds
- **Selling your practice.** Knowing your existing patients will give a potential buyer more insight when buying the goodwill of your patients (see **Selling your practice MSS 1668**)
- **Buying a practice.** Get an understanding of a potential patient list or catchment area if you are thinking of buying the goodwill of another dentist’s patients (see **Buying a dental practice MSS 1667**)

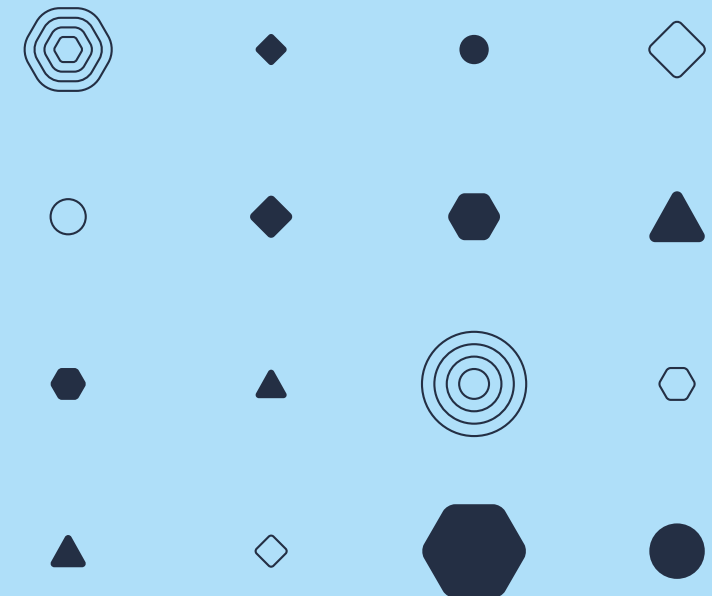
Whatever your reasons for asking for a report, it’s essential that you refer to it when putting together your business and marketing plans. Use it to support your marketing strategies and individual marketing campaigns and refer to the report whenever you are considering new marketing or business development activities.

If you have any questions about patient profiling please speak to your consultant, or a member of the Practice Marketing Support Team who will be happy to answer any questions you may have.

In summary, the more you know about your new and existing patients, the more successful your marketing and therefore your business will be.

- **Understand loyalty.** Knowing where your patients live can help you identify those that travel from further afield. Ask why they visit you rather than other more local dentists (see **Keeping your patients loyal MSS 1158**)
- **Create the most appropriate surroundings.** If you know what sort of newspapers and magazines your patients are most likely to read have them in the waiting room; if you play music find out what sort most appeals to your patients. It all adds to a better patient experience
- **Refurbish your practice.** If you’re thinking about re-vamping or decorating your practice, then understanding your patients helps to know what decor will most appeal to them
- **Stem patient leavers.** Knowing where your leavers live and understanding what sort of people they are may help you reduce patient loss

- **Know the catchment area of your practice.** If a new competitor practice opens up within it then you can gauge what impact it will have on your business and you can focus on those patients who may be most at risk of leaving because they are geographically better placed to attend the new practice



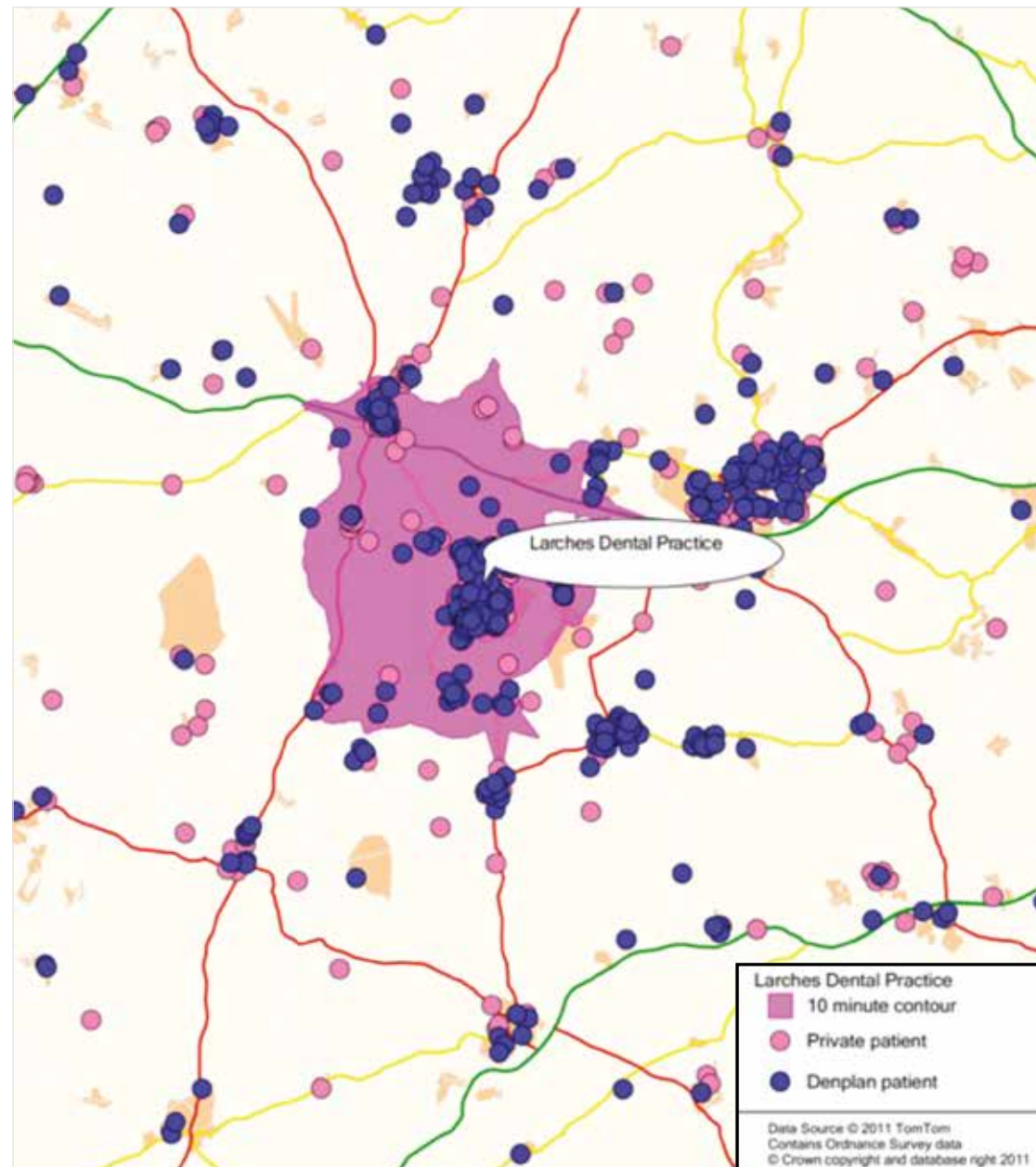
Helping to understand your profile report

Once you have your report your consultant or a member of the practice marketing team will go through it with you in depth and think about how the information can be used to support your business objectives. The report can be referred to at any time to support your marketing strategies and individual marketing campaigns.

The report consists of a series of maps, tables and graphs. See below for an example of the first map you will see in your report. It shows you where your current patients live. This can identify if there are any clusters

of patients living in particular towns or villages. This information may be useful when planning marketing campaigns and can allow you to focus your attention on certain areas, or on certain types of patients.

Map 1: showing study area and location of practice's patients



NB. Larches Dental Practice is not a real practice.

The summary table

The summary table is a good way to see all your data at a glance.

We can then compare these profiles to:

In the example below we can see the Acorn categories and groups of:

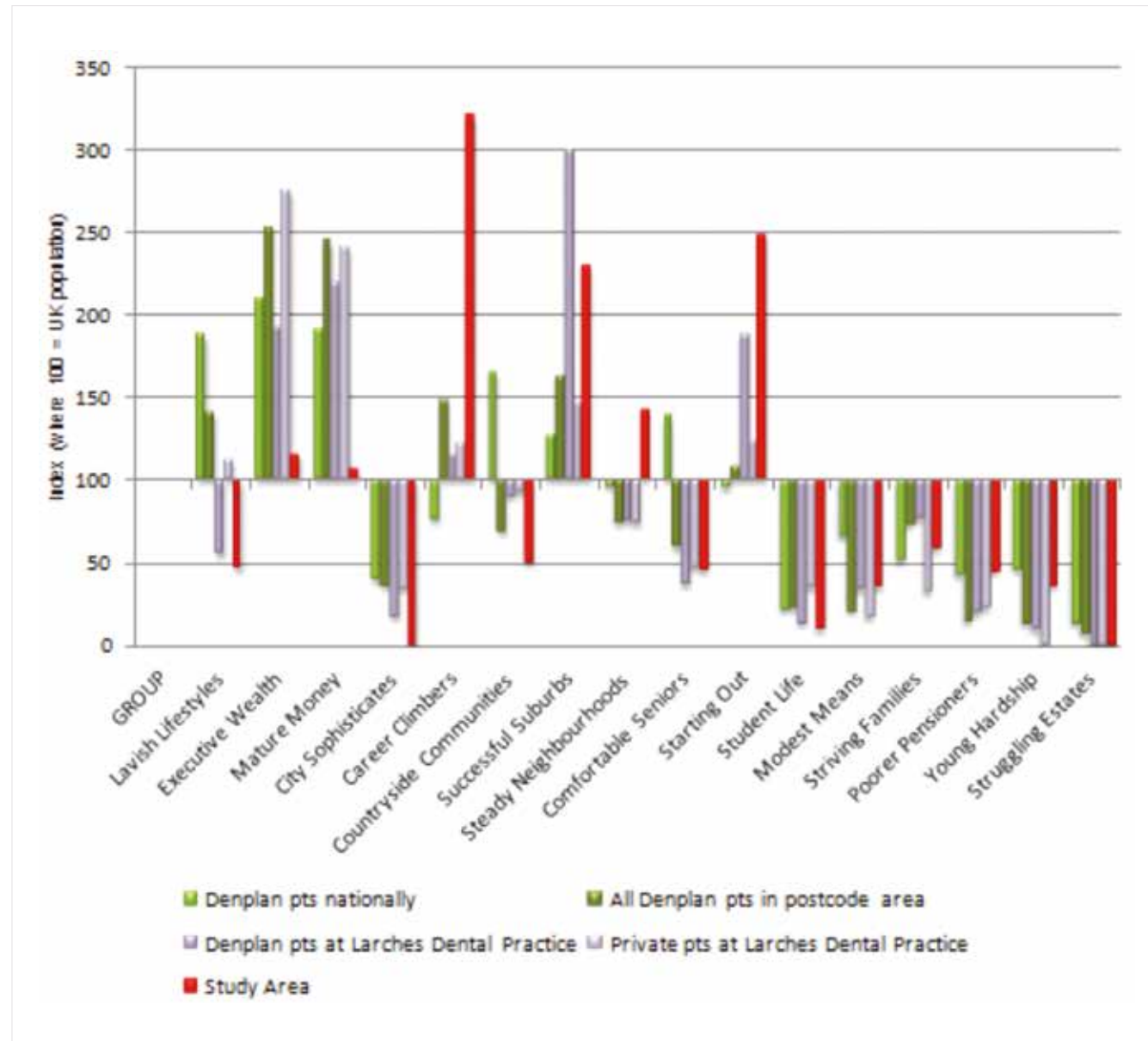
- The practice's current Denplan patients
- The practice's private patients

- All Denplan patients in the postcode area - to see the profile of people in the local area that are Denplan patients and the Acorn categories and groups they represent
- The population in the surrounding Study Area - to see whether there are any suitable Acorn categories and groups to target with marketing campaigns for new patient growth

For your report your Denplan consultant will go through this table with you to help you to identify the Acorn categories and groups to retain as well as identify potential patients.

| CATEGORY | | PERCENTAGE | | | |
|----------|-------------------------|---------------|------------------------|----------------------------------|------------|
| | | UK population | Denplan pts nationally | All Denplan pts in postcode area | Study Area |
| 1 | Affluent Achievers | 22.2 | 44.5 | 53.9 | 23.9 |
| 2 | Rising Prosperity | 8.7 | 5.4 | 9.3 | 17.8 |
| 3 | Comfortable Communities | 27.4 | 33.6 | 26.1 | 39.9 |
| 4 | Financially Stretched | 23.8 | 12.1 | 9.1 | 10.1 |
| 5 | Urban Adversity | 17.0 | 4.0 | 1.4 | 2.3 |
| 6 | Not Private Households | 0.9 | 0.3 | 0.2 | 6.0 |
| GROUP | | | | | |
| 1.A | Lavish Lifestyles | 1.3 | 2.4 | 1.8 | 0.6 |
| 1.B | Executive Wealth | 12.1 | 25.3 | 30.6 | 14.0 |
| 1.C | Mature Money | 8.8 | 16.8 | 21.5 | 9.4 |
| 2.D | City Sophisticates | 3.2 | 1.2 | 1.1 | 0.0 |
| 2.E | Career Climbers | 5.6 | 4.2 | 8.2 | 17.8 |
| 3.F | Countryside Communities | 6.5 | 10.7 | 4.4 | 3.2 |
| 3.G | Successful Suburbs | 6.0 | 7.5 | 9.7 | 13.7 |
| 3.H | Steady Neighbourhoods | 8.4 | 8.0 | 6.2 | 11.9 |
| 3.I | Comfortable Seniors | 2.6 | 3.5 | 1.5 | 1.1 |
| 3.J | Starting Out | 4.0 | 3.8 | 4.3 | 9.9 |
| 4.K | Student Life | 2.4 | 0.5 | 0.5 | 0.2 |
| 4.L | Modest Means | 7.9 | 5.2 | 1.6 | 2.8 |
| 4.M | Striving Families | 8.7 | 4.4 | 6.3 | 5.0 |
| 4.N | Poorer Pensioners | 4.9 | 2.1 | 0.7 | 2.1 |
| 5.O | Young Hardship | 5.0 | 2.3 | 0.7 | 1.8 |
| 5.P | Struggling Estates | 7.4 | 1.0 | 0.5 | 0.0 |
| 5.Q | Difficult Circumstances | 4.6 | 0.8 | 0.3 | 0.5 |
| 6.R | Not Private Households | 0.9 | 0.3 | 0.2 | 6.0 |

This information is also shown in graph format. See the example below:



Data is shown as an index:

The horizontal line is the UK population average so anything above the line shows an above average representation and anything below the line is an under-representation. Here we can see that the area has more than the UK average of Steady Neighbourhoods but this is not reflected in the practice's patient base so perhaps there would be potential here. This graph is to show at a glance the make-up of the practice and area compared with the UK. It should be used in conjunction with the table on page 7 which also takes into consideration the percentages of the groups.



How to use the information most effectively

Now that you have all this information you need to use it in the most effective way possible. The best way to explain this is to give some examples.

Example 1 – recruiting existing private patients to Denplan

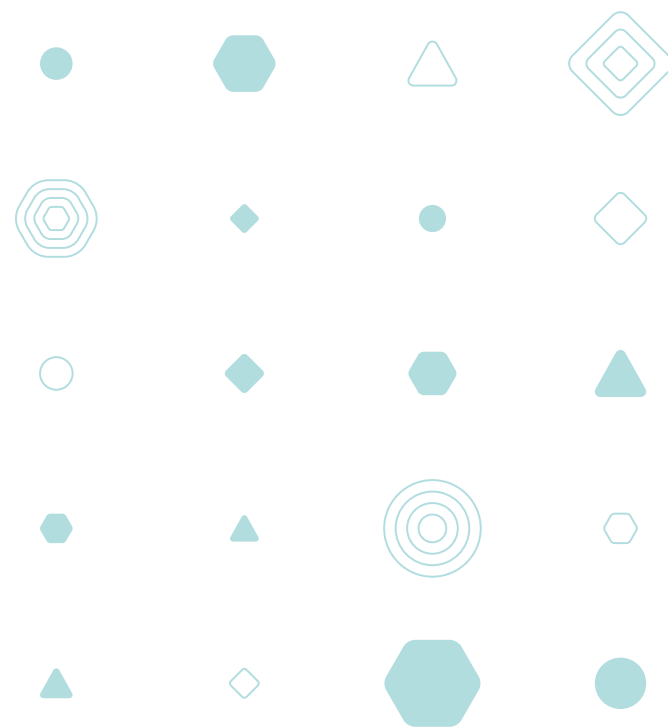
If you are looking to convert more of your existing private patients to Denplan the summary table can highlight the Acorn groups which may be suitable to encourage patients to join. In this example we can see that the Affluent Achievers category, specifically Executive Wealth and Mature Money, feature strongly in the patient base.

Some key characteristics of the people in the Affluent Achievers category shows that they:

- are usually wealthy family or empty nesters
- live in large detached or semi-detached properties
- live in the suburbs, on the edge of town or in semi-rural areas
- have a second home abroad
- often have managerial and professional occupations
- tend to be financially literate with multiple bank accounts, credit cards, investment, pensions and high savings
- are frequent users of the internet, typically for work, current affairs and shopping
- read the broadsheets
- are likely to own tablet PCs and smartphones

Here are some ideas for promoting Denplan to these patients:

- Try implementing 'VIP' extras that only Denplan patients get – not only can this cement relationships with existing Denplan patients, it also provides conversation starters for private patients who notice the benefits Denplan patients get. For example, you could offer particular perks such as an additional waiting area for Denplan patients and freebies, for example a free manual toothbrush or toothpaste when the patient is leaving the practice
- Holiday packs – display posters and flyers in patient areas to advertise that Denplan patients get a free holiday pack when they go on holiday. Packs can include travel-sized dental items and a card with the Denplan worldwide emergency number. Not only does this emphasise the insurance element of Denplan, it also sparks a conversation about Denplan to private patients who may ask about the packs
- Give existing Denplan patients seasonal gift vouchers to redeem at the practice and make sure these are advertised/promoted visibly for all patients to see. For example, at Easter you could give away gift vouchers for free toothbrushes, toothpaste and mouthwash to help combat the extra chocolate! At Christmas you could give away a gift voucher for a free tooth whitening cartridge (for patients that have trays)
- Run highly visible and desirable competitions for Denplan patients only. For example, have a box in reception/waiting area for Denplan patients to drop in an entry card to win a round of golf at a local golf club
- Ask private fee-per-item patients to complete the 60 Second Survey. The survey gauges patients' interest in joining Denplan and could be a way to start a conversation.
- Design posters and flyers for patient areas that focus on the benefits of what the different Denplan plans include
- Mature Money profile - design posters and flyers that appeal to older patients who may be retired as this group will expect value for money. Explain the benefits of Denplan Care, the importance of knowing you've already budgeted for dental care, no unexpected bills and the fact that it covers most restorative treatments. You could also consider offering a discount on dental implants to patients on a plan.



Example 2 – recruiting unknown patients externally

When looking at the summary table with your consultant, see whether there are any Acorn groups or categories in the study area column that are higher than your current patient base. These may provide new patient growth opportunities and you can target these groups with relevant marketing communications, knowing their hobbies, interests and other characteristics. This means that campaigns will be targeted, relevant, and ultimately better received by the profile.

For example, in the Summary Table below, you can see that the surrounding area has a high number of Starting Out and Career Climbers than the patient base. These two Acorn groups could therefore be potential new groups to target with a campaign.

| CATEGORY | PERCENTAGE | | | | |
|-------------------------|---------------|------------------------|----------------------------------|-------------------------------|------------|
| | UK population | Denplan pts nationally | All Denplan pts in postcode area | Dental pts at Dental Practice | Study Area |
| Affluent Achievers | 22.2 | 44.5 | 31.1 | 33.1 | 23.6 |
| Rising Prosperity | 8.7 | 5.4 | 7.0 | 4.5 | 7.6 |
| Comfortable Communities | 27.4 | 33.6 | 50.9 | 47.3 | 39.0 |
| Financially Stretched | 23.8 | 12.1 | 9.1 | 12.4 | 21.3 |
| Urban Adversity | 17.0 | 4.0 | 1.6 | 2.4 | 7.7 |
| Not Private Households | 0.9 | 0.3 | 0.3 | 0.3 | 0.8 |
| GROUP | | | | | |
| Lavish Lifestyles | 1.3 | 2.4 | 0.1 | 0.0 | 0.0 |
| Executive Wealth | 12.1 | 25.3 | 15.6 | 18.1 | 12.2 |
| Mature Money | 8.8 | 16.8 | 15.4 | 15.0 | 11.4 |
| City Sophisticates | 3.2 | 1.2 | 0.0 | 0.2 | 0.1 |
| Career Climbers | 5.6 | 4.2 | 7.0 | 4.3 | 7.5 |
| Countryside Communities | 6.5 | 10.7 | 25.4 | 31.8 | 16.8 |
| Successful Suburbs | 6.0 | 7.5 | 6.9 | 7.3 | 7.2 |
| Steady Neighbourhoods | 8.4 | 8.0 | 7.6 | 2.5 | 3.5 |
| Comfortable Seniors | 2.6 | 3.5 | 4.0 | 2.3 | 2.9 |
| Starting Out | 4.0 | 3.8 | 7.0 | 3.4 | 8.6 |
| Student Life | 2.4 | 0.5 | 0.1 | 0.0 | 0.3 |

When looking at this kind of data, it's also important to cross-reference the column that shows all 'Denplan patients nationally'. This will show you how likely someone from that profile is to join Denplan. You should also look at the 'All Denplan patients in postcode area' column to see what the trend for that profile is like locally, and whether they are likely to join a payment plan.

In the summary table, although only 4% of Denplan patients nationally account for Starting Out, you can see from the 'All Denplan patients in postcode area' column that, locally, 7% of Denplan patients are in this group.

Next, if you decide to target new patients to the practice from the Starting Out or Career Climbers groups, discuss this with your Denplan consultant and make a list of their characteristics, hobbies and interests.

About Starting Out:

- Younger couples in their first home, starting a family
- Usually at an early stage of their career
- Some are still renting but most will be buying their home with a mortgage
- Tend to have junior executive jobs and other white collar or professional occupations
- Although household incomes tend to be above average the need to have saved a deposit and paid off student loans means housing is usually lower cost relative to the area
- Typically live in terraced or smaller semi-detached homes
- Tend to spend more time online than average – smartphones and table computers may be popular

About Career Climbers:

- Younger singles, couples and families with young children
- Usually live in urban locations, frequently London and other big cities
- Tend to have higher educational qualifications than average
- Often work in managerial and professional roles
- Have some savings, investments, pensions and loans
- Keen users of the internet and prefer email marketing
- Confident technology users – smartphones, tablet PCs, games consoles

Now that you have some understanding of the type of person you are aiming to talk to, discuss some marketing ideas with your Denplan consultant that are relevant to the target groups.

Here are some ideas for promoting Denplan to these patients:

- As they usually live in urban locations and may very well use public transport, consider advertising at bus stops or train stations
- Make sure your outdoor signage is clear and attractive. If they are commuting past you every day on the way to work, grab their attention. Use temporary banners to advertise special offers
- As they are high internet users, make sure your website is up to date and easy to find on search engines. If they are looking for a new dental practice, they are very likely to look on the internet first. Make sure you are appearing high up the Google rankings – see 'Your practice website and social media' for more information about Search Engine Optimisation (SEO)
- Provide a special offer for members of local gyms and health clubs – you could do this through leaflets, vouchers, ads in member newsletters, and ads on gym TV screens
- Make sure your campaigns include messages that are important to this age group – i.e. talk about treatments that not only help maintain healthy teeth but also the improve appearances. An attractive smile is often important to younger professionals. You can also emphasise that they can budget for their dental care monthly with Denplan



The make up of the population immediately around the practice

This map shows the Acorn categories of the population in the immediate roads surrounding your practice.

This can be useful if you would like to test the success of a small campaign, such as a flyer drop, before you print thousands of flyers to distribute in a larger area.

Map 5: Acorn categories of population immediately around practice



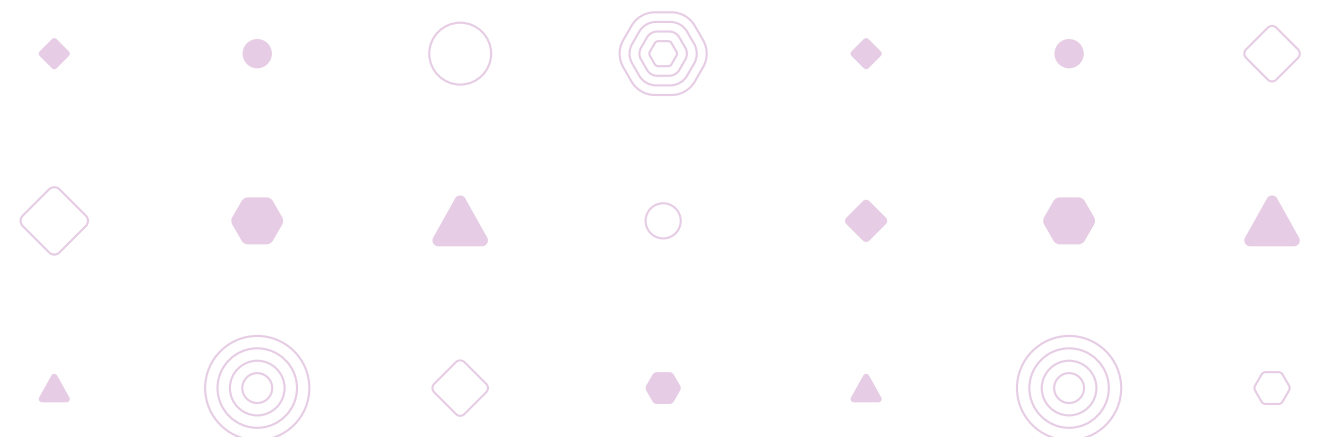
If you are thinking of doing a flyer drop there is a section in your patient profile report which shows the population of Acorn categories and groups in the postcode sectors in your surrounding area. You can see in which postcode sectors the target Acorn categories and groups have a high presence and only drop the flyers in those sectors.

This means you reduce the risk of wastage, it keeps your marketing costs down and maximises the response rate. Your messages can also be adapted for the Acorn groups you are targeting.

| Postcode sector | Population in postcode sector | Number | | | | | |
|-----------------|-------------------------------|--------------------|-------------------|-------------------------|-----------------------|-----------------|------------------------|
| | | Affluent Achievers | Rising Prosperity | Comfortable Communities | Financially Stretched | Urban Adversity | Not Private Households |
| SO22 4 | 11095 | 3296 | 832 | 1276 | 3200 | 2347 | 144 |
| SO23 0 | 5640 | 645 | 283 | 949 | 2446 | 1317 | 0 |
| SO23 7 | 8766 | 3919 | 1736 | 1564 | 917 | 503 | 127 |
| SO23 8 | 3101 | 209 | 1125 | 552 | 668 | 509 | 38 |
| SO23 9 | 4891 | 2003 | 1208 | 529 | 1131 | 0 | 20 |
| SO24 0 | 4208 | 3669 | 0 | 202 | 337 | 0 | 0 |

| Postcode sector | Population in postcode sector | Percentage | | | | | |
|----------------------------------|-------------------------------|--------------------|-------------------|-------------------------|-----------------------|-----------------|------------------------|
| | | Affluent Achievers | Rising Prosperity | Comfortable Communities | Financially Stretched | Urban Adversity | Not Private Households |
| Denplan patients nationally | | 44.5 | 5.4 | 33.6 | 12.1 | 4.0 | 0.3 |
| All Denplan pts in postcode area | | 33.1 | 3.0 | 48.1 | 11.8 | 3.6 | 0.3 |
| UK population | | 22.2 | 8.7 | 27.4 | 23.8 | 17.0 | 0.9 |
| SO22 4 | 11095 | 29.7% | 7.5% | 11.5% | 28.8% | 21.2% | 1.3% |
| SO23 0 | 5640 | 11.4% | 5.0% | 16.8% | 43.4% | 23.4% | 0.0% |
| SO23 7 | 8766 | 44.7% | 19.8% | 17.8% | 10.5% | 5.7% | 1.4% |
| SO23 8 | 3101 | 6.7% | 36.3% | 17.8% | 21.5% | 16.4% | 1.2% |
| SO23 9 | 4891 | 41.0% | 24.7% | 10.8% | 23.1% | 0.0% | 0.4% |
| SO24 0 | 4208 | 87.2% | 0.0% | 4.8% | 8.0% | 0.0% | 0.0% |

In the case above we can see that if you wished to target Affluent Achievers, SO24 0 would be a good postcode sector and SO23 8 would be more suited if Rising Prosperity was your target Acorn category.



Your patient profile report also gives information at a more detailed level of Acorn groups within postcode sectors.

| | | Affluent Achievers | | |
|-----------------|----------------------------|--------------------|------------------|--------------|
| Postcode sector | Total population in sector | Lavish Lifestyles | Executive Wealth | Mature Money |
| S022 4 | 11095 | 281 | 2640 | 375 |
| S023 0 | 5640 | 143 | 357 | 145 |
| S023 7 | 8766 | 47 | 2407 | 1465 |
| S023 8 | 3101 | 8 | 139 | 62 |
| S023 9 | 4891 | 369 | 1207 | 427 |
| S024 0 | 4208 | 276 | 2655 | 738 |

| | | Affluent Achievers | | |
|----------------------------------|----------------------------|---------------------|--------------------|----------------|
| Postcode sector | Total population in sector | % Lavish Lifestyles | % Executive Wealth | % Mature Money |
| UK population | | 1.3 | 12.1 | 8.8 |
| Denplan patients nationally | | 2.4 | 25.3 | 16.8 |
| All Denplan pts in postcode area | | 0.1 | 16.6 | 16.4 |
| S022 4 | 11095 | 3% | 24% | 3% |
| S023 0 | 5640 | 3% | 6% | 3% |
| S023 7 | 8766 | 1% | 27% | 17% |
| S023 8 | 3101 | 0% | 4% | 2% |
| S023 9 | 4891 | 8% | 25% | 9% |
| S024 0 | 4208 | 7% | 63% | 18% |

Patients' lifestyles

Your patient profile report will also provide a lifestyle commentary of a typical Denplan patient at your practice.

Table 8: Lifestyle of practice's Denplan patients

'Middle aged...Detached houses...Luxury cars...Interests include wine and playing golf...Owns home outright...High savings...Directors & Managerial...High incomes...High online spend...Buys wine and books holidays on the internet'

Home Life

The customers in this profile (Larches Dental Practice's Denplan pts) will typically be living in detached homes with 4-5 bedrooms, which they are likely to own outright. One would expect there to be 2-3 people living in these neighbourhoods with no dependent children in the household. House values in these neighbourhoods is typically around 17% above the base (UK May2013) average of £225,564. Characteristically, the family or household structure is likely to be a couple family with no children or a couple family with children.

Finance

People working in these types of neighbourhoods will typically work in senior management or be self employed. Average household income across this profile is around £41,900 which is 15% above the base average and many will pay a higher rate of tax. About 38% more households than in the base have an income of between £80,000 and £100,000.

The savings value of these customers is expected to be over £25,000 and they are likely to have investments of over £20,000. They are likely to save and invest their money in unit trusts, or a stocks and shares ISA.

A greater proportion of people in the profile than in the base have a credit card and they are likely to spend over £500 per month. They are unlikely to have any loans and/or current debts. There are few benefits claimants amongst this profile.

Marketing

While most people in this profile would prefer to be contacted by email. They will also respond to an email or mail - addressed to 'the householder' or 'the occupier' or to you by name.

They are acceptable of receiving information via cinema advertisements and/or mail - addressed to 'the householder' or 'the occupier' or to you by name from home improvement and DIY companies and/or consumer electronic companies.



All this is invaluable, not only for targeting your marketing more accurately, but for finding out the best way of doing so i.e. by email or mail.

Whether you are looking for new patients, wanting to find out about your current patients or why some patients are leaving, a patient profile report is an excellent tool to use and is a good starting point. To find out more contact your Denplan Consultant.

