THE REPORT

GMR WEB TEAM

Dental Care Report 2017
(July – December)

Source: RepuGen

Dental Care Patient Satisfaction Benchmark Report

Welcome to the Second Research Findings of the Bi-Annual
GMR Web Team Dental Patient Satisfaction Survey 2017 (July-December)

Since the inception of our first patient satisfaction survey report, we have seen some changes in the ways patients review their dental visit experience. This survey follows on from our first report, comparing the useful insights on reviews and patient satisfaction. In the first report, we had analyzed data for the first six months of 2017 i.e., January through June 2017. In this second report, we have shown the important trends in online reviews and patient satisfaction for the last six months of 2017 i.e., July through December 2017 by comparing the data with January-June 2017.

This survey measures the LOYALTY of patients for their dental offices and helps dentists understand the needs of their patients for developing effective patient related programs to address their pain points. This will help in developing a stronger bond between patient and the dentist and the patients will become the advocate of the dental office, resulting in more referrals and fueling growth.

Key Takeaways from 2nd Dental Patient Survey:

- 89% of patients gave positive ratings about their visit to dentists, which is exactly same as 89% in January-June 2017 survey
- 5% rated their experience neutral, and 6% rated their experience negative, there were insignificant changes as compared to the previous report
- Overall, the Net Promoter Score, a measure of patient's loyalty, for dentists is 60* (Total Sample = 394), whereas it was 68 in January-June 2017
  - 77% of the patients are Promoters - Loyal enthusiasts who will keep referring other patients, down 4% when compared to January-June 2017
  - 13% of the patients are Passives - Satisfied but NOT enthusiastic patients who are vulnerable to competitive offerings, whereas it was 11% in the first six months of 2017
  - 10% of the patients are Detractors - Unhappy patients who can damage the reputation of dentists and impede growth through negative word of mouth, whereas it was 7% in the first half of 2017
- Sentiment analysis of all patients' comments about their experience suggested happiness among 87% and anger among 2% of all patients.
- Care, Friendly, and Professional were the dominant words used by patients who rated their experience as positive.

** Net Referral Score (a measure of Patient's Loyalty) = % of Promoters - % of Detractors. Promoters are defined as % of patients who gave a rating of 9 or 10 to their dentist and Detractors are defined as % of patients who gave a rating between 0 and 6

Why the Dental Patient Satisfaction Survey Benchmark Report?

Based on our experience of marketing dental care centers since the inception of GMR Web Team reputation management software RepuGen in 2016, we have noticed a fairly consistent Net Referral Patient score. However, there is a lack of correlation between Net Referral Score and dentists' online reviews. This could be because unhappy patients are more likely to vent their frustrations online vs satisfied patients posting a positive experience online.

There are four primary goals of this report:

- Compare Patient's Loyalty for the entire Dental Category vs. our last survey.

- Help individual dentists and dental groups track their Net Promoter Score vs. the entire category, and use the information for segmented marketing campaign to get patient referrals.

- Identify Patient's Pain Points, develop patient's programs to address these pain pains, and track how these initiatives are impacting those pain points.

- Check online review scores to make sure it's consistent with the average of the dentists used for this survey.

About the GMR Web Team Dental Patient Satisfaction Survey

- An online survey was conducted from July 2017 through December 2017 among 394 patients, belonging to a handful of dentists in the U.S. who are using the GMR Web Team service. We then compared the findings with the first six months of 2017 (January through June 2017) to show the actual trends.

- The patients were asked to select their likelihood of recommending the dentist based on their latest experience on a scale of 0 to 10.

- Patients were asked to explain the reason behind their rating.

- All the information (rating score and comments) was detached from patient and doctor identification to make the report HIPAA compliant. GMR Web Team cannot backtrack comments or sentiments to link Net Promoter Score or sentiment to any patient or dentist who were used for this report.

- Patients were then classified into 3 categories – Promoters, Passives, and Detractors

- **Promoters:** Patients giving a rating of either 9 or 10 to their dentists were classified as Promoters. They are loyal enthusiasts who will keep referring the dentists to other patients.
- **Passives:** Patients giving a rating of 7 or 8 to their dentists were classified as Passive. They are satisfied but NOT enthusiastic patients who are vulnerable to competitive offerings.
- **Detractors:** Patients giving a rating of 0 to 6 to their dentist were classified as Detractors. They are unhappy patients who can damage the reputation of their dentist and impede growth through negative word of mouth

✓ All comments were grouped by positive, negative, and neutral ratings.

✓ An established 3rd party artificial intelligence tool was used to gauge patient sentiment by group (positive, negative, neutral) and also to gauge the intensity of the sentiment based on their comments about their experience.

✓ GMR Web Team proprietary software was used to analyze word density of comments by group for all patients to identify words used by patients to describe their experience.

How Do Patients Rate Their Visit to Dental Office Based on Their RepuScore?

*Repuscore is the score given by patient on a scale of 0 to 10 when asked their likelihood of recommending the dentist based on their experience of the last visit. 0 means will not recommend and 10 means will recommend.
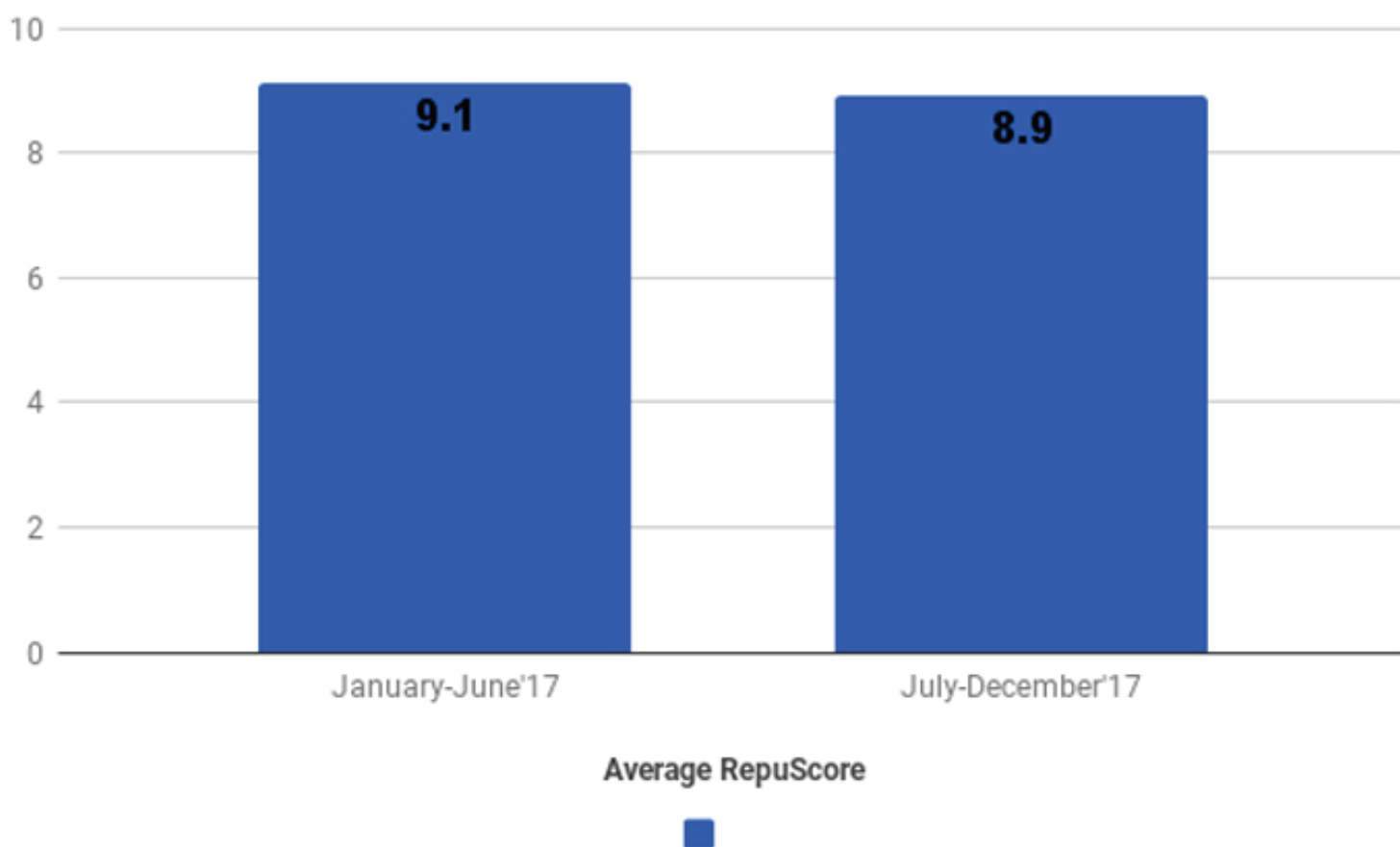

Average RepuScore

Key Findings:

✅ There was a slight decrease of 0.2 in Average RepuScore as compared to the first six months of 2017

Analysis:

The likelihood of recommending the dentists has seen a slight decrease. Paying more attention to patients' experience at dental offices is the key to getting more recommendations from patients.

| All Ratings (Rating Breakdown)

All Ratings (Rating Breakdown)

■ January-June'17   ■ July-December'17
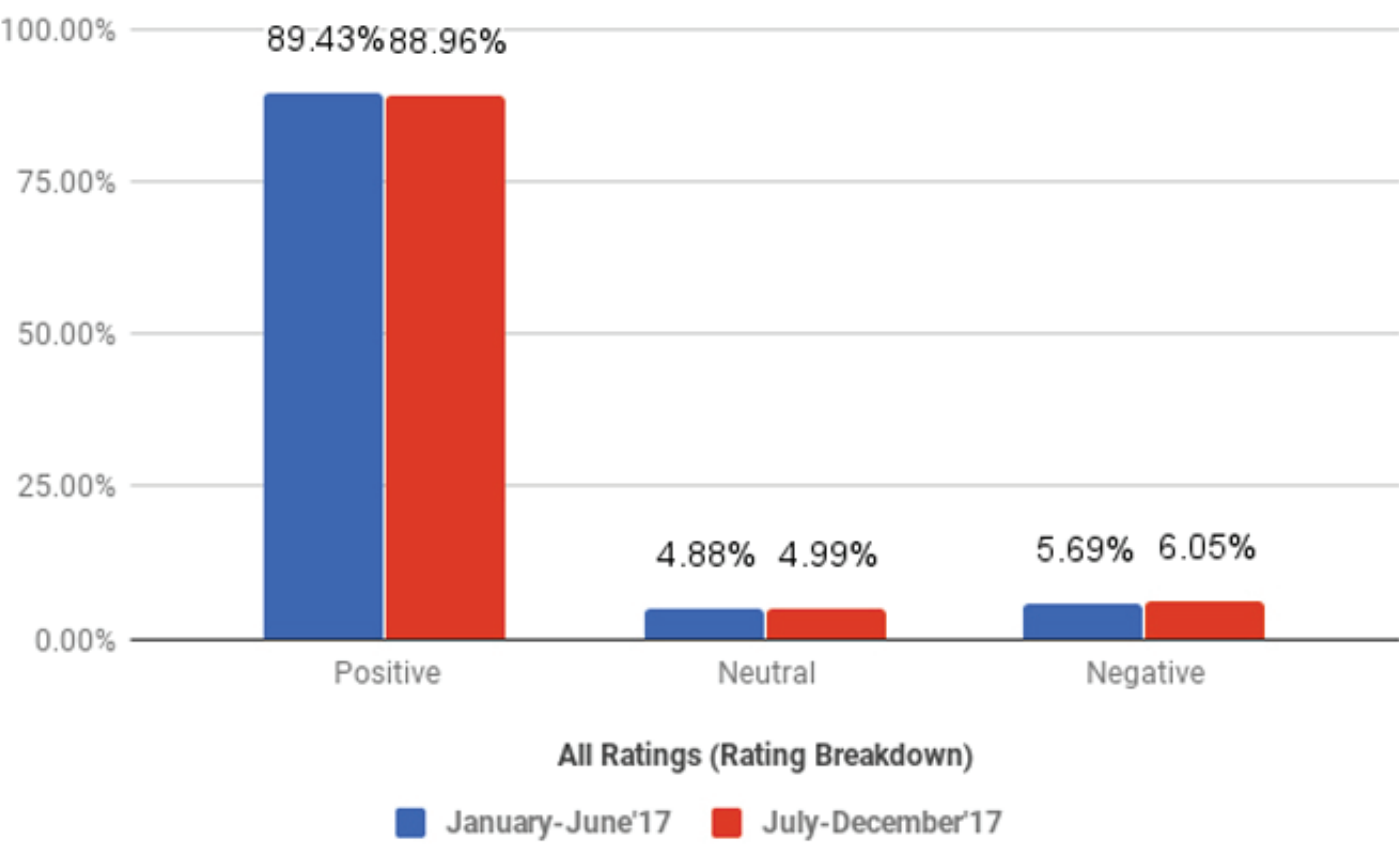
Key Findings:

✅ Consistent with the overall data, more patients rated their experience as positive

✅ Patients rating their experience neutral increased slightly compared to the last survey

- 6.05% of patients rated their experience negative, whereas it was 5.69% in January-June 2017
- However, these changes are small and are not statistically significant

Analysis:

The consistency in positive and neutral ratings suggests that the efforts by dental offices to address their patients' concerns are paying off. However, the slight increase in negative ratings shows that some dental offices have slipped. Dental offices have to compare their individual scores with the overall numbers to identify areas for improving patients experience when they visit their office.

Net Promoter Score Breakdown

The Net Promoter Score is an index ranging from -100 to 100 that measures the willingness of customers to recommend a company's products or services to others. It is used as a proxy for gauging the customer's overall satisfaction with a company's product or service and the customer's loyalty to the brand.

Net Promoter Score Breakdown

■ January-June'17   ■ July-December'17
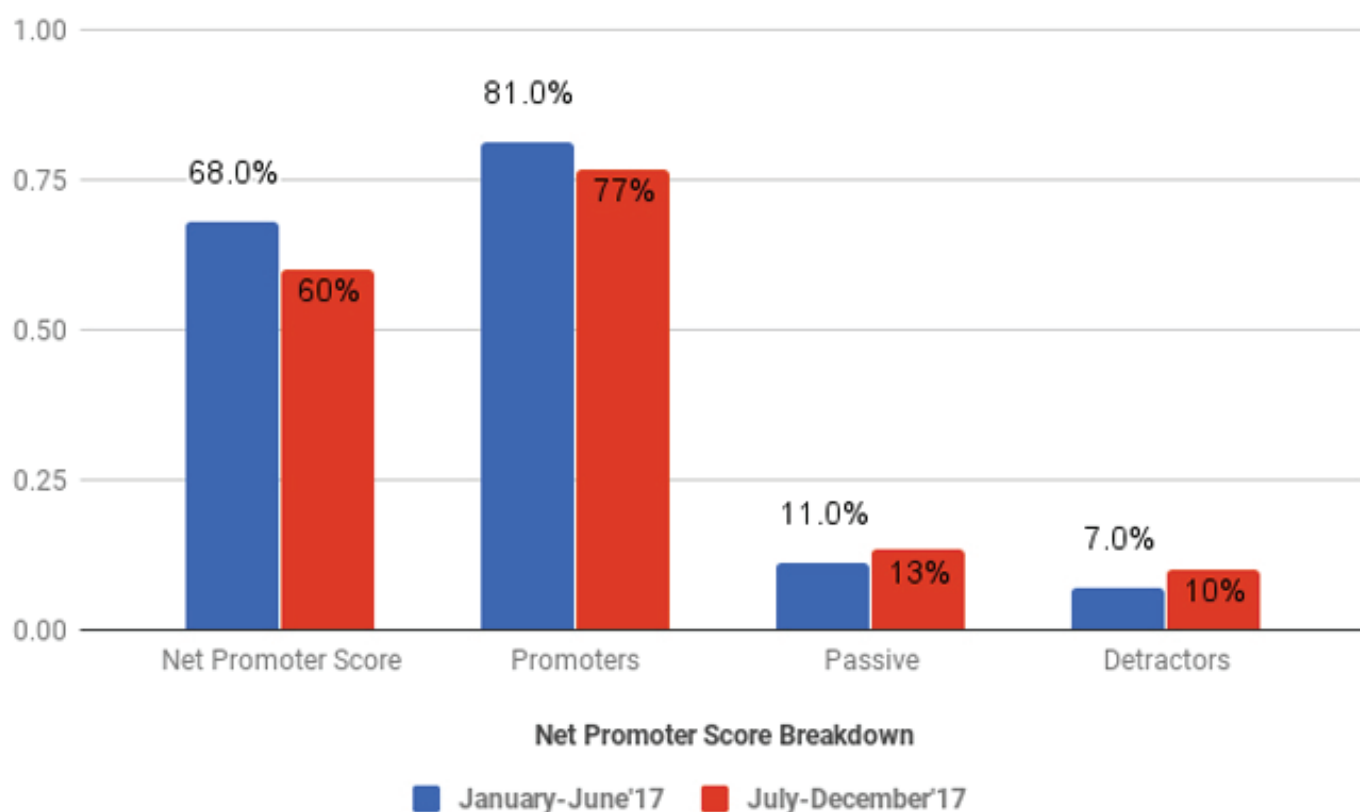
Key Findings:

- Net Promoter Score saw a decrease of 8% point when compared with the first six months of 2017

- ✓ Percentage of patients who could become promoters increased by two percentage point in the latest survey compared to the last one
- ✓ 10% of current patients are unhappy about their experience with their dentist, a three percentage point increase from the last survey

Analysis:

The decrease in Net Promoter Score suggests a drop in patients' happiness with the services at some locations. Overall, 23% of patients are not happy and could leave their current dentist in the near future. Medical practices or dentists need to look at their individual scores and compare with the average number to identify areas where they are doing better and areas where they need to improve.

Patient Sentiment Analysis after their visit:

Patients are asked to explain their reason for rating their visit the way that they did. GMR Web Team analyzes sentiments and its intensity based on the comments, using an artificial intelligence tool.


Customer Emotion Breakdown

■ January-June'17 ■ July-December'17
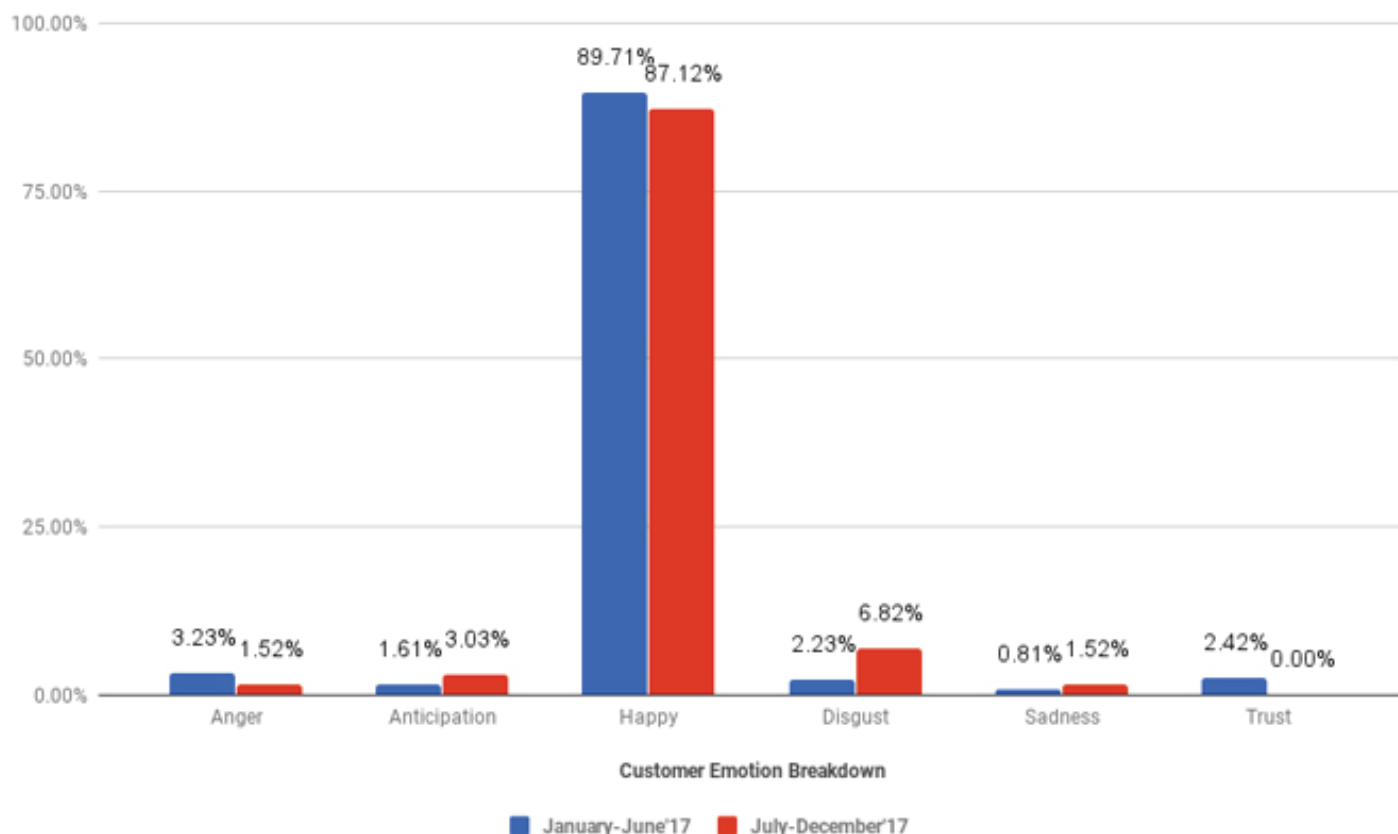
Key Findings:

✅ Feeling of anticipation increased from 1.61% to 3.03% among the patients

✅ 87.12% of patients left their dentist happy, a drop from 89.71% in January-June 2017

✅ 1.52% of patients are angry with their dentist which showed a decrease of 1.71% when compared to the first half of 2017

✅ None of the patients showed trust, whereas it was 2.42% in January-June 2017

Analysis:

As there is a decrease in the number of happy patients, dentists or medical practices should make sure to evaluate their scores to identify any potential reason for increased dissatisfaction. They should also consider bringing up some programs to increase patients' trust, engagement and satisfaction. An increase in anticipation data and a slight decrease in angry data is a positive sign for dentists.
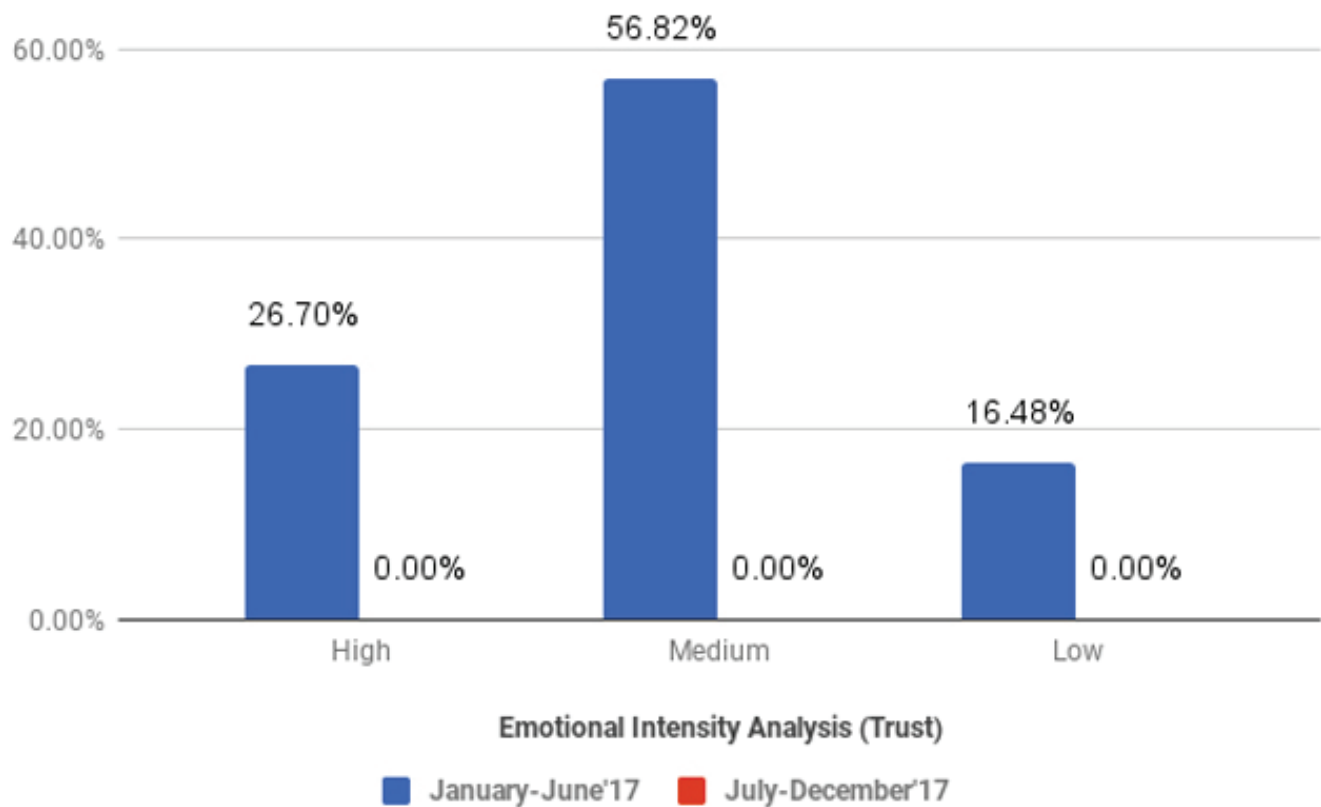
Emotional Intensity Analysis (Happy)

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■ January-June'17   ■ July-December'17
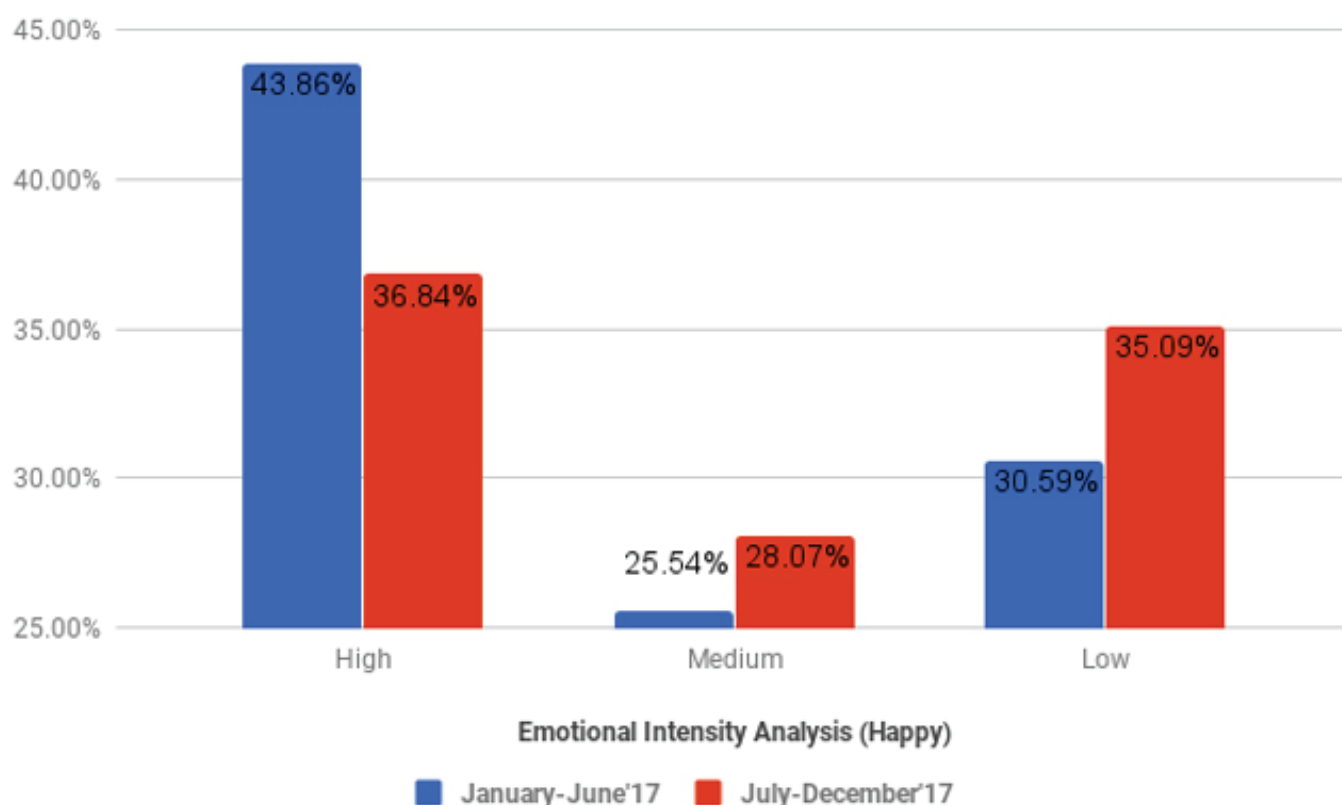
Key Findings:

- ✅ 36.84% of those exhibiting "Happy" emotion showed high intensity, a 7.02 percentage point decrease from the last survey
- ✅ 28.07% of patients showed medium intensity which has increased by 2.53% when compared to January-June 2017
- ✅ The low intensity data is 35.09%, whereas it was 30.59% in January-June 2017

Analysis:

Dentists and medical practices need to identify patients who showed high intensity and launch a campaign to convert them to advocates for the center. There is room for improvement of intensity for dentists for solidifying their relationship with patients.

| Emotional Intensity Analysis (Trust)

Emotional Intensity Analysis (Trust)

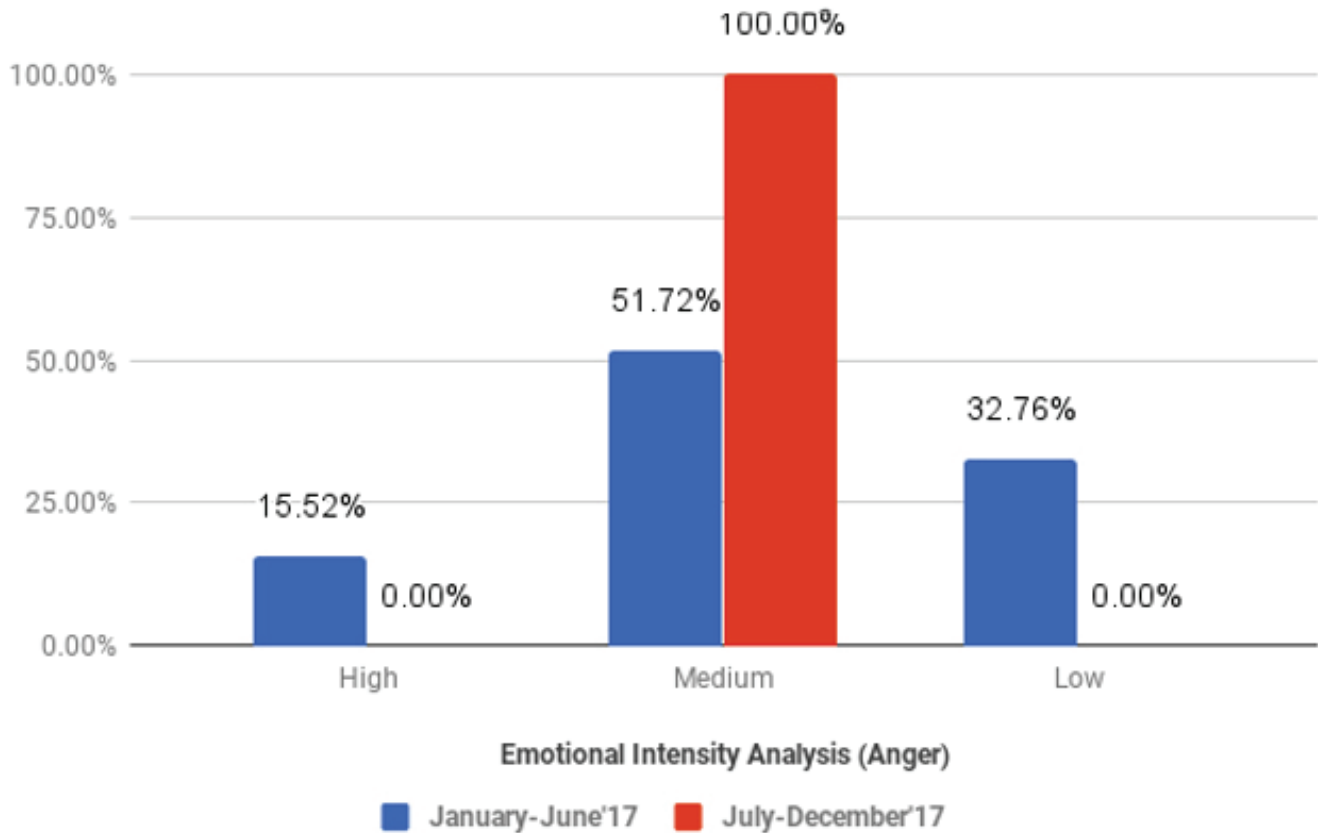■ January-June'17 ■ July-December'17

Key Findings:

- ✅ IThere is no trust data in July-December 2017

Analysis:

Since none of the patients showed trust, dentists should work on establishing trust between them and their patients.

Emotional Intensity Analysis (Anger)

Emotional Intensity Analysis (Anger)

January-June'17   July-December'17

Key Findings:

✓ All the patients exhibiting "Anger" emotion showed medium intensity in July-December 2017

Analysis:

As all the patients showed medium intensity, it suggests room for improvement in patient recovery. Dentists should handle unhappy patients proactively.

Word Cloud Analysis

Word cloud analysis uses the frequency of words used by patients and picks up the most used words. Size of the word denotes frequency in the chart above.

| Positive Ratings -- Top 20

Key Findings:

✓ Care, Friendly, Professional, Knowledgeable, and Comfortable were the most used words among patients who rated their visit between 9 and 10.

✓ Helpful, Experience, Always, Recommend, Excellent and Nice were some other frequently used words.

Analysis:

Frequently used words by satisfied patients should resonate a positive sentiment, and thus could be used to build expectations for new patients, knowing fully well that it will resonate and that the practice will be able to fulfill the promise. An example could be making a bold statement like Caring, Friendly, Professional – these are the most used words that patients use to describe their visit.

Negative Ratings – Top 20

Key Findings:

- ⊘ Current is the most frequently word used by unhappy patients.

- ⊘ Cleaning, Provided, Appointment, Months, Afraid and Frequent are other negative words used by patients.

Analysis:

Frequently used words by unhappy patients allow the dentists to gauge patients' reasons for dissatisfaction. However, given the fact that the comments of patients were detached, we can assume that the wait time and hours were among the major concerns. These words are more relevant when linked to the patients (which GMR Web Team account holders can do), and also when analyzing the complete review written by the patients.

Why is the Dental Patient Satisfaction Benchmark Report So Important?

Online reviews and recommendations from existing patients are the best source of new patients for dentists. In-depth analyses of patient experience helps dentists identify their strengths and weaknesses, giving them the knowledge to make positive organizational changes.

Understanding the patient sentiment and its intensity provides insight into the patients' mindsets after they leave the office. Dentists can use the information to improve satisfaction and brand their practice consistent with the positive sentiments generated by their service.

Density of words extracted from patient's Net Promoter Score of different groups will help communicate the desired branding effort better.

Suggested Next Steps:

Dentists should gather patient experience information to better understand patient sentiment, and ultimately improve patient care and satisfaction.

Patient satisfaction data can also be used to attract more patients by:

- ✓ Improving online reputation by requesting happy patients to share their information on the internet. Over 30% of prospective patients select their doctor solely based on their online reviews.

- ✓ Developing an automated referral program that requests happy patients to recommend their dentists to others.

Contact us at **www.gmrwebteam.com** to learn how you can start building your patient satisfaction data and how to use it to generate more patients.