

ARCHIVED

Report

DENTAL MARKETING IN THE DIGITAL WORLD

NATIONAL SURVEY RESULTS

RESEARCH METHODOLOGY

This report analyzes the results of an online survey for dental professionals. The survey and report were sponsored by Futuredontics and the American Association of Dental Office Managers. The report includes the answers from all respondents who took the survey between April 1, 2013 and April 30, 2013. A total of 1,779 completed responses were received to the survey during this time.

EXECUTIVE SUMMARY

The nationwide survey explored respondents' perception and actual behavior on a variety of digital marketing activities. Key areas of study included:

- Dental Websites
- Online Content Updates
- Social Media
- Patient Reviews
- Appointment Reminders
- Staffing and Resources

Historically, dental professionals have been late adopters of many new marketing technologies, and this survey reveals that this continues to be the case in many areas. In particular, the industry remains unconvinced that social media and online reviews are an important part of practice marketing, despite clear trends that patients prefer to interact in these online spaces. As a result, these channels are being consistently underutilized. An alarming number of practices have no presence on the major social networks or reviews sites, or are not monitoring the profiles they have.

Websites have gained much more traction. The majority of respondents already have an active site and view it as an important part of the practice marketing. However these websites are overwhelmingly outdated – particularly in terms of new online standards, SEO best practices and mobile phone readiness. Practices are also surprisingly dependent on external webmasters to update their content (and even those with the ability to self-edit admit to being inconsistent on maintaining their sites).

One area where practices have consistently achieved a high level of efficiency is appointment reminders, likely due to the pervasive use of automated patient communication software.

Many dental practices also continue to engage in more traditional marketing activities such as print advertising and mailers. Because the efficacy of these approaches will vary by location, careful tracking is essential. Unfortunately, only half of dental offices are measuring the results of their marketing, which means considerable marketing dollars are almost certainly being wasted on under-performing tactics.

Finally, a common theme throughout survey responses is a lack of understanding about the importance (or mechanics) of many digital marketing techniques. To meet this need, we have listed our full library of marketing whitepapers and on-demand Webinars on the final page of this report.

DEMOGRAPHICS

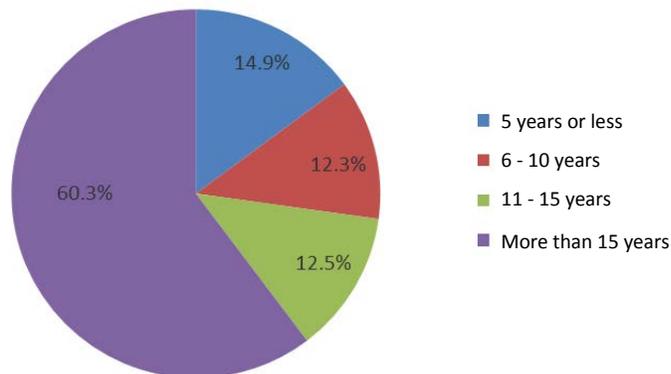
The survey was open to all dental professionals. 53.1% of respondents were dentists and 19.2% were office managers. The remaining responses were split between dental assistants, hygienists, front office staff, consultants, and those identifying as "other."

56.4% of respondents were female and 43.6% were male. A wide range of ages were represented, but over 60% of the respondents were 45 or older.

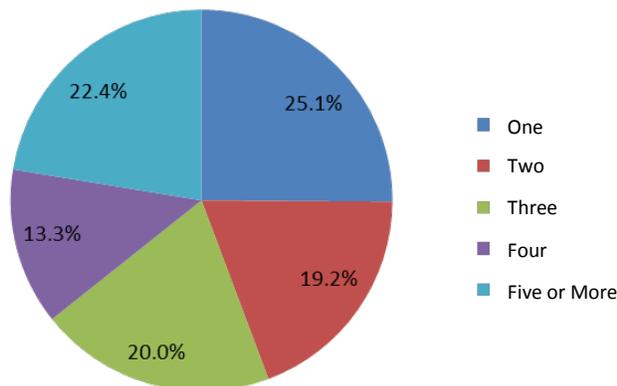
Dentist	53.1%	Under 25	1.4%
Office Manager	19.2%	25-34	16.5%
Dental Assistant	2.1%	35 - 44	21.6%
Dental Hygienist	5.3%	45 - 54	28.1%
Front Office Staff	5.5%	55 or older	32.3%
Consultant/Agency	1.1%		
Other	2.7%		

Our respondents also represented a great deal of experience in dentistry, both in terms of years worked in the industry and number of practices worked with during their careers.

How long have you worked in the dental profession?



How many dental practices have you worked with during your career?



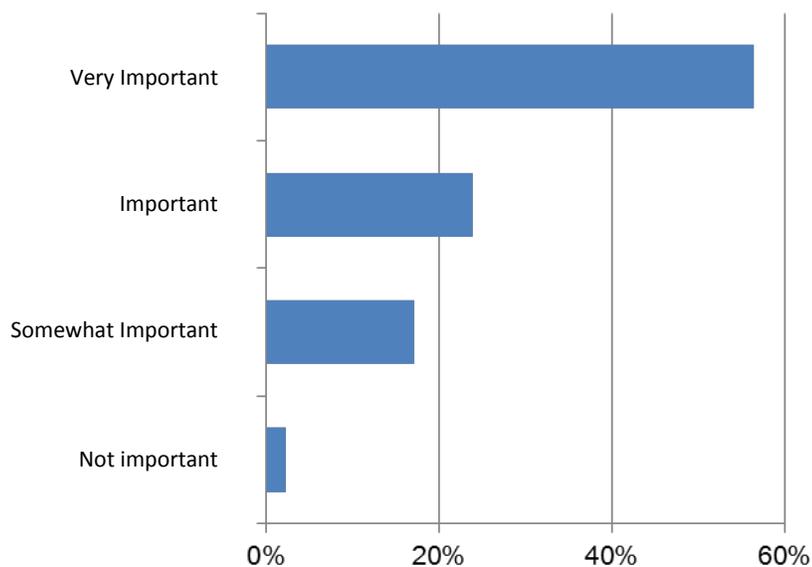
(Interesting to note, although not factored into our results: We also cross referenced gender against the roles of dentist and office manager. 74% of dentists were male and 26% were female, while 94% of office managers were female and 6% were male).

PRACTICE WEBSITE

Repeated studies, including a 2013 dental patient survey, have shown that a practice website is a major factor for dental patients when choosing a dentist – and that many patients make judgments about the practice based solely on the website.¹ In that spirit, we wanted to see if dental professionals view their websites with the same importance.

In this arena, respondents were in sync with patients. 80.4% of respondents indicated that the practice has a website and the exact same percentage, 80.4%, felt that a website is “important” or “very important” to the practice. Only 2.4% felt it was not important at all.

How important do you believe a website is to a dental practice?

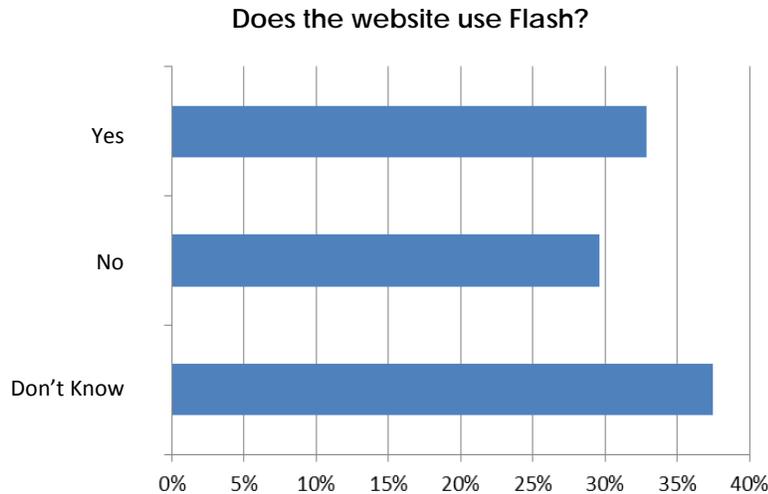


Next we asked about the age and quality of these sites – specifically looking into whether websites have been redesigned to keep up with changes to Web technology, SEO standards and consumer behavior. **The shelf life of a website is only about 3-5 years before it needs to be updated to allow for new online advances, and the majority of respondents’ sites (61%) were older than this cutoff.**

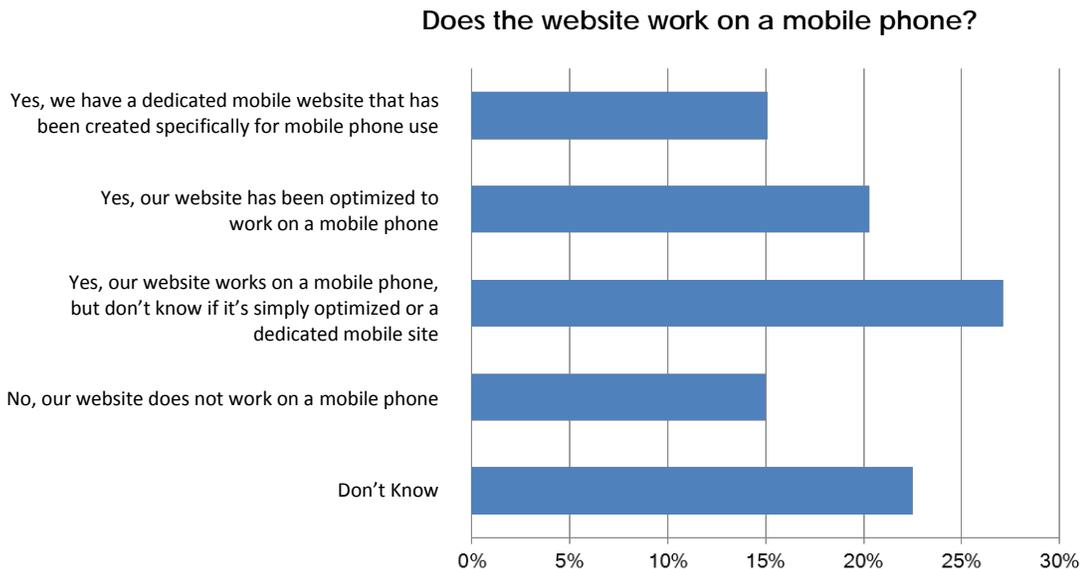
When was the practice website created?

Over 5 years ago	30.6%
3-5 years ago	30.5%
1-2 years ago	21.7%
Within the last 12 months	12.2%
Don't know	5.0%

A pervasive issue among older websites in general is the use of Flash (once a popular platform for adding animation and interactivity). Flash sites are incompatible with many modern devices, including iPhones and iPads, and hurt a practice's searchability online. **Alarmingly, a third of respondents report that their websites use outdated Flash technology and another 37.5% don't know, suggesting that the number may in fact be much higher.**



Another common website challenge is not having a dedicated mobile site (a version of the site specifically designed to load properly on smartphones and other mobile devices). Mobile Internet searches are quickly surpassing desktop computers – and 60% of consumers will abandon a mobile site if they don't see what they want right away.²

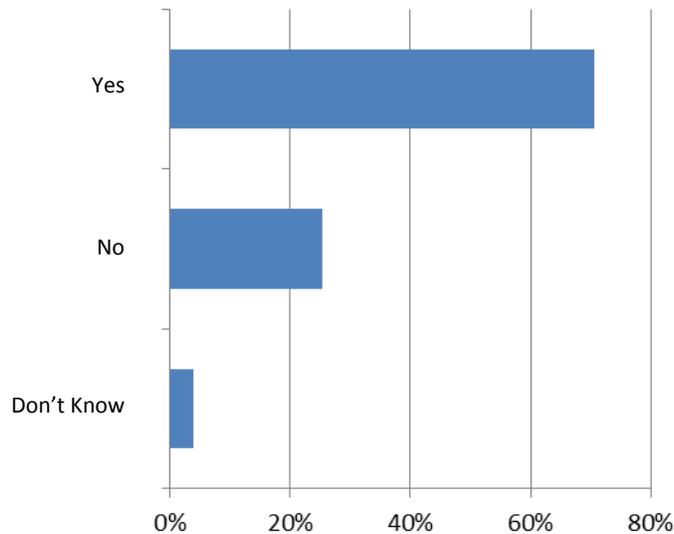


Within the dental community, there seems to be little adoption and a lack of understanding around dedicated mobile sites. Only 15.1% of respondents have a site specifically created for mobile use. 27.1% aren't sure whether their site is a dedicated site or has simply been optimized (meaning it simply shrinks down to adjust to a smaller screen). And 22.5% don't know if their site works on a mobile phone at all.

One new website feature that has achieved traction in the majority of practices is online appointment requests (ability to request an appointment directly from the website, rather than calling or emailing the practice).

70.7% of respondents indicate that patients can request appointments from the website – and this is encouraging since nearly a third of dental patients consider this feature an important factor when choosing a dentist.³

Can patients request an appointment from the website?



KEY FINDINGS: Most dental practices have a website and view it as an important part of the practice. In addition, some newer features like online appointment requests are becoming more widely offered. However, the fact that nearly 20% of offices do not have a website indicates there is still need for improvement as an industry.

The majority of respondents' sites are more than three years old and haven't been updated to account for new online standards. Specifically, Flash technology is still being used more often than not in dental websites, rendering these sites invisible to patients using Apple® devices and most smartphones. And while some websites have been "optimized" for mobile phones, only 15% have a true dedicated mobile site.

Most notably, there appears to be a high level of uncertainty around new web standards. The large percentage of respondents who "don't know" whether their sites are up to date suggests a significant need for education around dental websites – as well as a huge opportunity to increase dentists' production by updating their online presence.

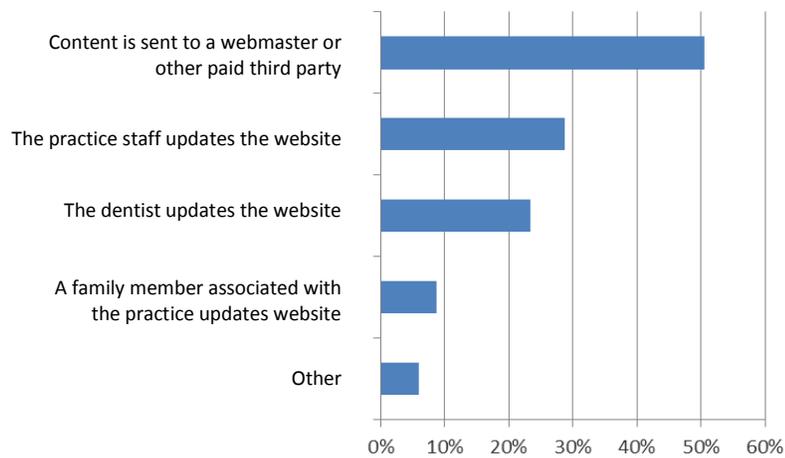
(Note: For a more in-depth look at dental website best practices, read our whitepaper "13 Warning Signs Your Website Needs Help" – details on the last page of this report.)

WEBSITE CONTENT

Having dynamic, ever-changing content on the practice website is important for two reasons. 1) Google and other search engines factor this in when deciding whether the practice website is relevant to a consumer; 2) It conveys to patients that the business is active and that the dentist is engaging with them online.

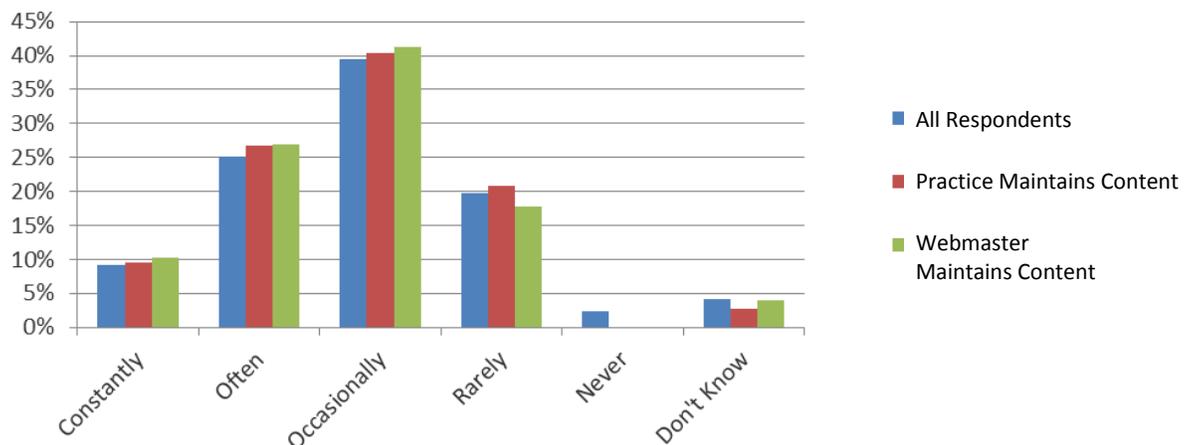
To understand dental practice behavior around content, we first asked who makes content updates to the website. **Over 50% of respondents rely on a webmaster or other third party to make changes – and 37.9% use these outside sources exclusively.** Secondly, 28.8% of practice staff and 23.3% of dentists update the website content.

Who updates the content on the website?



Next we asked how often content is updated. The majority (39.5%) indicate that they update "occasionally." 34.3% update constantly or often, and only 2.4% say content is never updated. We also cross-referenced who updates to see if that affected the frequency of updates, but there was no material difference. The "who" did not affect the "how often."

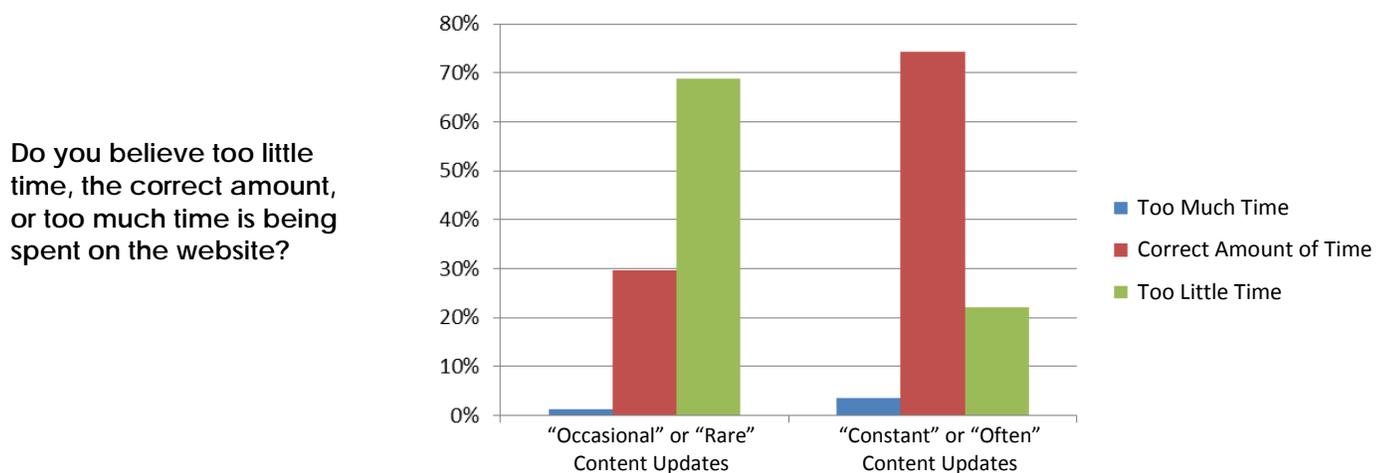
How often is content updated on the website?



To put this information in context, we asked whether the time spent maintaining the practice website had changed relative to two years ago. For nearly a third of respondents, time has increased. 42.3% report that they are spending the same amount of time and only 10.6% are spending less. 14.4% of respondents indicate they “don’t know.”

Changes in time spent maintaining the practice website	
Time Increased	32.7%
Time Stayed the Same	42.3%
Time Decreased	10.6%
Don't Know	14.4%

Next, we asked whether the time spent on updates felt appropriate – and compared this against the frequency of updates. This revealed an interesting pattern.



Respondents who update “constantly” or “often” feel they’re spending the correct amount of time. Those who update content “occasionally” or “rarely” feel they’re not spending enough time. Almost no one felt they were spending too much time on updates.

Respondents clearly agree that the practice website should be updated frequently, even if they’re not currently doing so.

KEY FINDINGS: Nearly 40% of respondents are dependent on an outside party to edit their website. There is also a disconnect between their ideal and actual behavior when it comes to making updates. Despite relative consensus that content should be updated frequently, only a third of respondents are keeping up – even among those who have the ability to make changes themselves.

The solution may be to transition to a user-friendly service that offers drag-and-drop editing (and still provides full-service support). Editing photos and text with these services is as easy as updating Facebook, and this may facilitate more frequent updates.

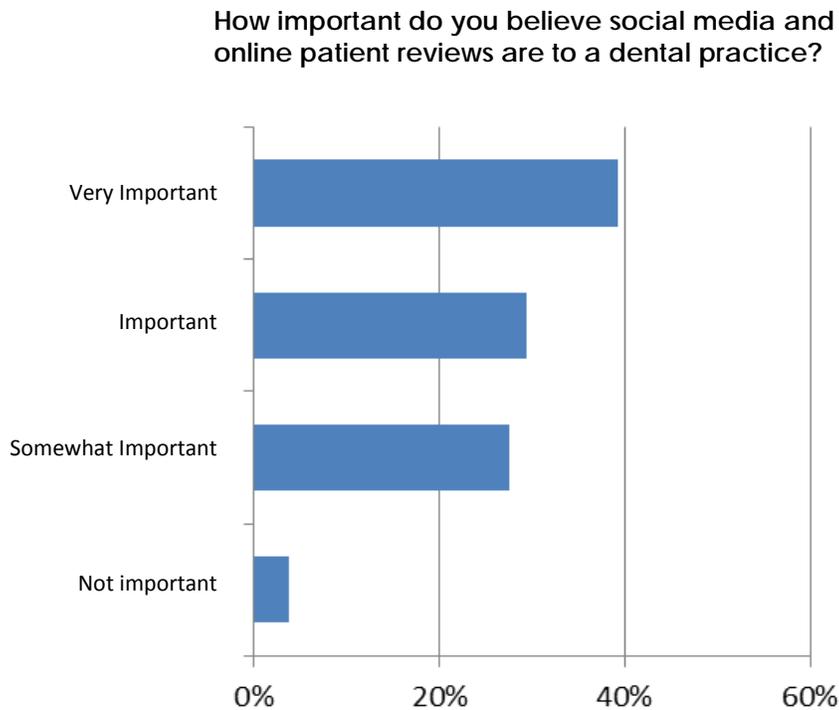
Respondents clearly know the importance of keeping their websites fresh, but their actions suggest they need the tools to make the process simpler and faster.

SOCIAL MEDIA & PATIENT REVIEWS

Social media sites like Facebook are becoming an increasingly important part of dental marketing. Not only are these the sites where patients typically spend most of their online time, according to our recent dental patient survey, 24% would actually use Facebook to search for a dentist. More importantly, interaction on social media has been proven to translate into buying behavior, with 51% of consumers saying they're more likely to buy a product or service since becoming a "fan" online.⁴

Online reviews have become an even more important factor for dental patients. 70% of consumers report that ratings and reviews from other patients influence their decision to visit a dental practice.⁵

Despite these statistics, respondents to our survey indicate a fair amount of ambivalence about social media and reviews. Less than 40% rated these areas as "very important" to the practice, and the remaining responses are somewhat evenly divided between "important" and "somewhat important." 3.7% indicate that they were "not important" at all.

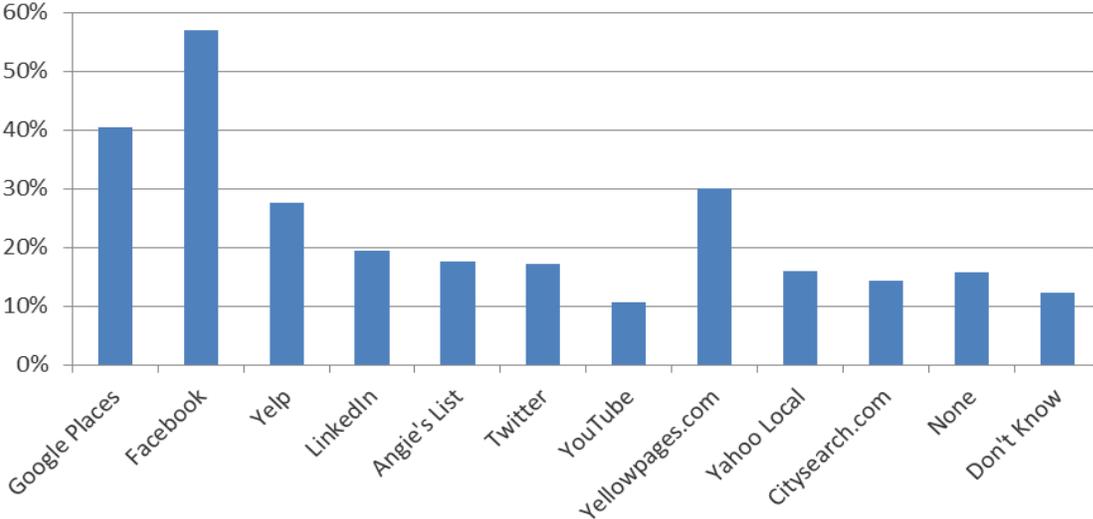


NOTE: While not the focus of this study, there is a noticeable difference here between the responses from dentists and office managers – with office managers rating social media and reviews as significantly more important. This rift will be further explored in our next report.

We next asked respondents whether they had a current business profile on any of the most popular social networks and online reviews sites.

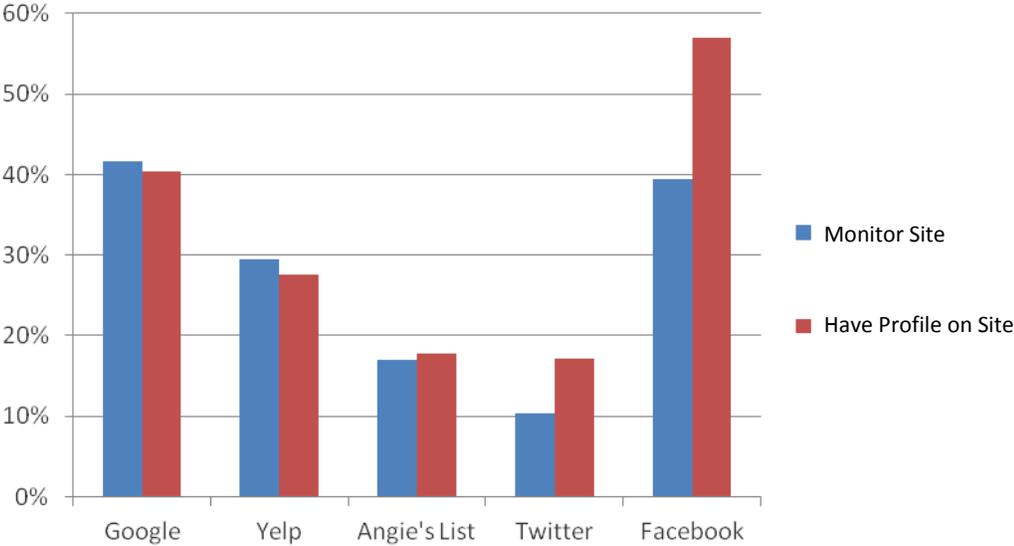
Facebook and Google Places are the most commonly used, at 56.9% and 40.4% respectively. However, given the importance of these sites to consumers, both are still highly underutilized in the dental practice. The remaining sites are utilized by less than a third of practices. 15.8% respondents do not have business profiles on any of these sites – and 12.3% say they don't know.

Does your practice have a business profile page on any of the following sites (check all that apply)?



When we asked about whether practices actively monitor any of these social sites, the results were similar -- Google and Facebook receive the most attention and the remaining sites are monitored by less than 30% of respondents. However, when we compared whether respondents have a profile side by side with whether they monitor it, we found something interesting. **Facebook has an unusually large discrepancy (17.5%) between those who have a business profile and those who actively monitor the page.** This suggests that while dental practices are hearing the message that they need a Facebook presence, there is still a lack of awareness about its true value and/or how to use the site effectively.

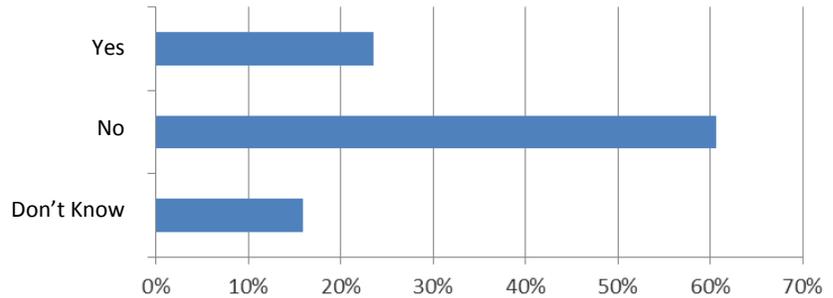
Does your practice monitor any of the following (check all that apply)?



To that end, we wanted to see whether dental practices were fully engaging with social media by customizing their online profiles to match the look and feel of their website. This is especially important when patients navigate from one site to the next, and it creates a feeling of consistency and credibility. Respondents overwhelmingly indicate they have not customized their social media profiles (60.6%) or they don't know (15.9%).

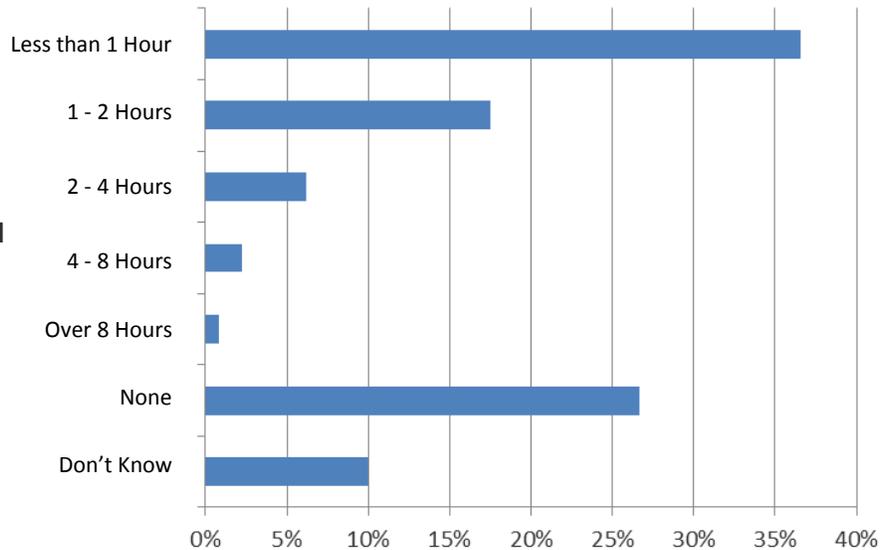
23.6% of practices responded that they have carried their practice brand over to social media to create a uniform online identity – an encouraging number given the relative ambivalence towards social media indicated above.

Has your practice customized any of its social media pages to have the same look as the website?



As would be expected based on the lack of industry-wide buy-in around social media and reviews, the majority of respondents spend less than an hour on these activities – and 26.7% spend no time at all. 10% don't know how much time is spent.

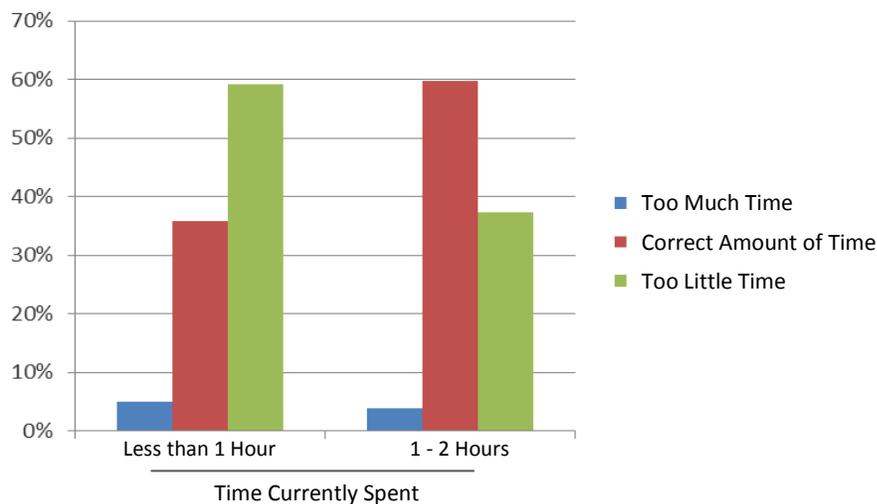
How much of the week is spent by the practice engaging in social media and reviews?



For context, we next asked whether this time usage reflected a change relative to the previous two years, and whether practices felt the current time was appropriate. The responses to both questions were mixed. An almost equal percentage of respondents report that time has increased as indicated that it has stayed the same. Similarly, responses are fairly evenly split between "too little time" and "correct amount of time"

Time Spent on Social Media			
Time Increased	40.3%	Too Little Time	50.7%
Stayed the Same	37.9%	Correct Amount	43.5%
Time Decreased	4.2%	Too Much Time	5.7%
Don't Know	17.5%		

We then dug deeper and cross referenced how much time is being spent versus whether respondents feel it's enough – and here, a consensus emerged. Those who spend 1-2 hours overwhelmingly feel that the correct amount of time is being spent. Those who spend less than one hour overwhelmingly feel that not enough time is being spent. In other words, **most respondents feel that 1-2 hours per week is the correct amount of time for social media.**



KEY FINDINGS: The dental community as a whole remains unconvinced about the importance of social media and reviews, despite clear trends that patients prefer and expect to use these channels.

The majority spends less than one hour per week on these activities – while at the same time conceding that the ideal amount of time would be between one and two hours.

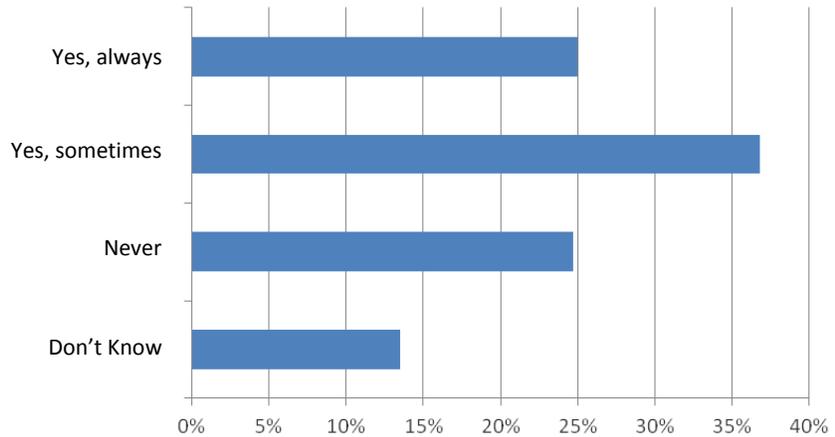
As a result, social networks and major reviews sites are being significantly underutilized and infrequently monitored, even Google and Facebook, which have gained the best traction within the industry.

Facebook has the largest percentage of unmonitored profiles – practices that set up a page, but don't actively engage with the site. This may indicate that practices have heard the message that they need a profile, but haven't accepted that it adds value. One way to close this gap is for practices to use tools that integrate familiar marketing tactics (online appointment requests, patient reviews, etc.) seamlessly into the Facebook page – for example the Facebook widget from PatientActivator.

RESPONDING TO REVIEWS

An important step in a practice's online marketing strategy is responding to patient reviews – both positive and negative. And fortunately, 61.8% of practices are currently doing this at some level. Even better, a quarter of respondents say they respond to every review.

Does your practice respond to patient reviews?

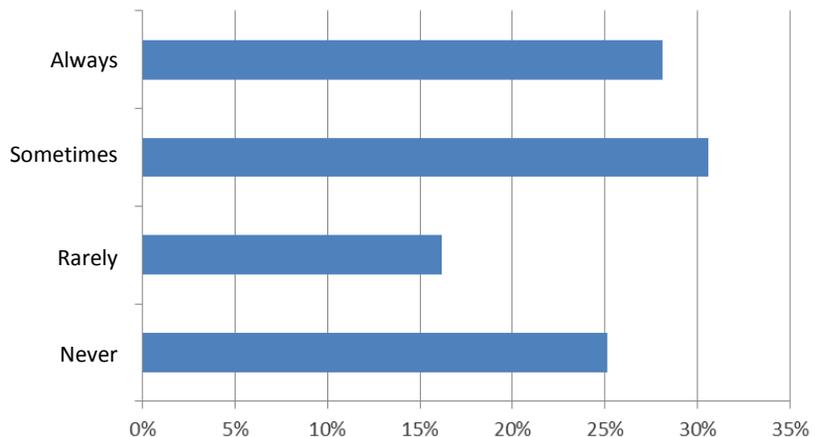


However, 24.7% of practices never respond to reviews and 13.5% say they don't know whether the practice replies or not. These offices are missing opportunities to reinforce positive experiences and to potentially diffuse negative feedback. In fact, according to a recent study, 92% of consumers would consider returning to the business they negatively reviewed if they received an apology.⁶

(NOTE: For a step-by-step approach for how to professionally respond to reviews, read our previous whitepaper "Dealing with Negative Reviews" – details on the last page of this report.)

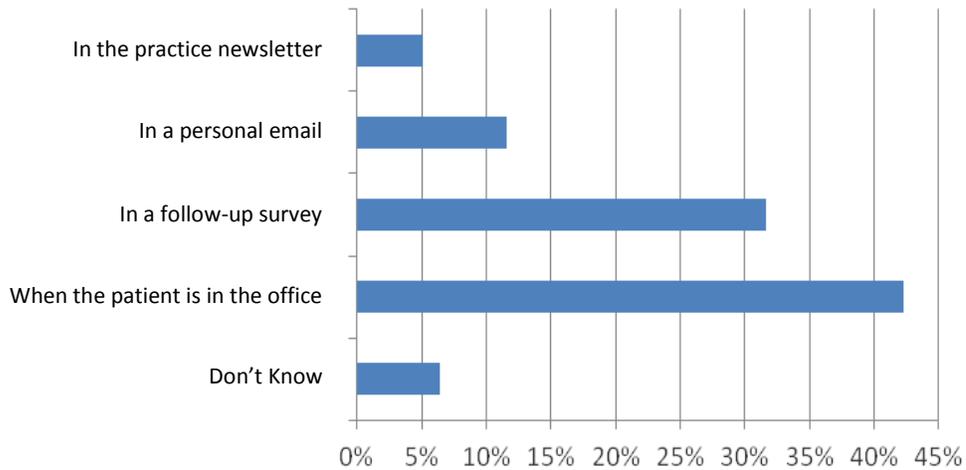
We next delved into whether practices are actively soliciting positive feedback. In this area, dental practices seem to be inconsistent. 27% always ask for reviews, 29.5% sometimes ask, 15.5% rarely ask, and 24.2% say they never ask. 3.8% of respondents don't know how often reviews are solicited.

How often does your practice ask for reviews from patients?



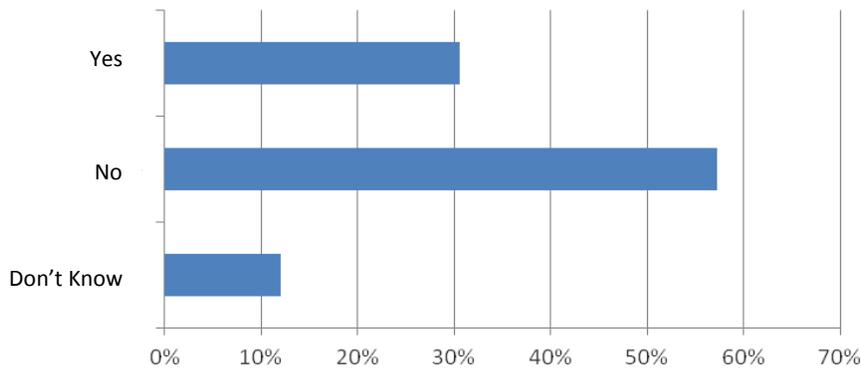
The most common time to ask for reviews is when the patient is in the office (42.3%), followed by patient surveys at 31.7%. This is good news as surveys are proven to be an effective and efficient method for gathering reviews, especially when automated to go out three days after each appointment.

How does your practice ask for reviews? (check all that apply)



Finally, we asked whether positive patient feedback is being shared via social media. Only 30.6% of respondents indicate that they share patient reviews on sites like Facebook. 57.3% do not share reviews on social media and 12.1% don't know.

Does your practice share patient reviews on social media sites like Facebook?



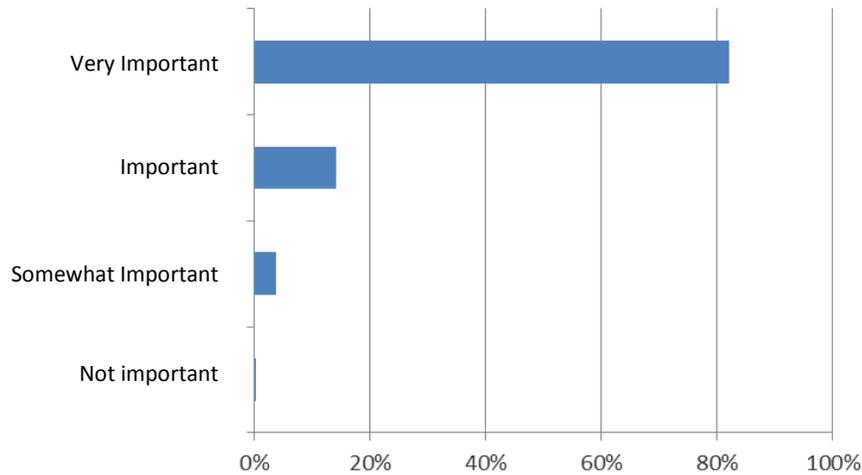
KEY FINDINGS: Most practices are making some effort to respond to patient reviews, although only 25% say that they are consistent about replying to all feedback.

Overall, there is very little consistency about whether practices actively ask for reviews from patients – and less than a third are sharing positive reviews via social networks. This means within the industry there is huge opportunity (and need) for improvement in an area that dental patients routinely rate as an important factor in their choice of dentist.

PATIENT APPOINTMENT REMINDERS

The area with the most agreement throughout all respondents is the importance of patient appointment reminders, and this is true across all practice roles. 96.1% rank reminders as “important” or “very important” and less than half of a percent indicate they are “not important.” (Interestingly, of the few respondents who say reminders are not important, almost all are still using them.)

How important do you believe patient appointment reminders are to a dental practice?



Phone calls are still the most-used method at 95.3%, followed by email (63%), postcards (55.5%) and text messages (52.3%). However, it's also important to note that most practices are utilizing multiple approaches. For example, two thirds of the offices who utilize phone calls also send email reminders. Although postcards are still used in over half of dental offices, this does represent a substantial decline – dropping 36.1% compared to 2012.⁷

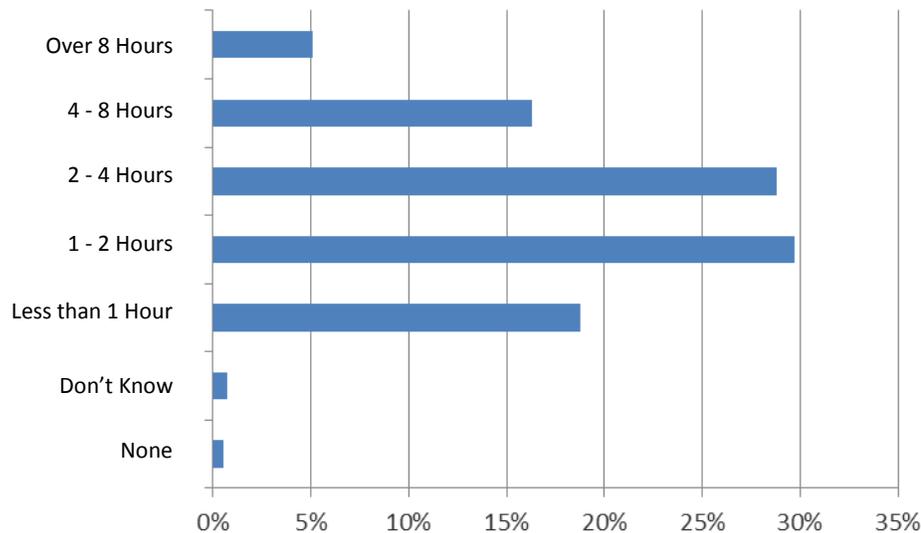
Which of the following methods does your practice use for appointment reminders? (check all that apply)



1.7% are not using reminders at all. (However of these, 78.9% still rate reminders as “important” or “very important.” This may indicate that there are individuals within these practices who know the value, but are not decision-makers. Alternatively, this may reflect dental professionals who have no use for reminders – such as those in academia, on military bases, etc.)

Respondents seem to have achieved a high amount of efficiency with appointment reminders. Almost half of practices report that they spend less than two hours a week, and another 28.8% spend between 2-4 hours. This trend is likely due to the high saturation of automated patient communication software throughout the industry (A 2012 study revealed that 77.1% of offices already used an automated service).⁸

How much of the week is spent by the practice on appointment reminders?



However a surprising amount of practices (16.3%) are still spending 4-8 hours on appointment reminders, and 5.1% spend even more. This suggests two things: 1) Any practice not using an automated patient reminder service should explore this option immediately. 2) Practices who already use a software may not be using it to its full capabilities.

KEY FINDINGS: The majority of dental professionals value and utilize patient appointment reminders – particularly phone calls and emails. Fewer than 1% of respondents feel reminders are unimportant, say they do not use reminders, or indicate that they don't know how much time is being spent on this activity.

In addition, offices have already become highly efficient in this area, which correlates with the wide adoption of automated communication software throughout the industry.

Even so, over 20% of practices are still spending more than four hours a week on their reminders. Because the majority of offices already have automated tools in place, this is one area where efficiency can be easily and quickly added. As practices become even more comfortable relying on automation, less time will be required by practice staff.

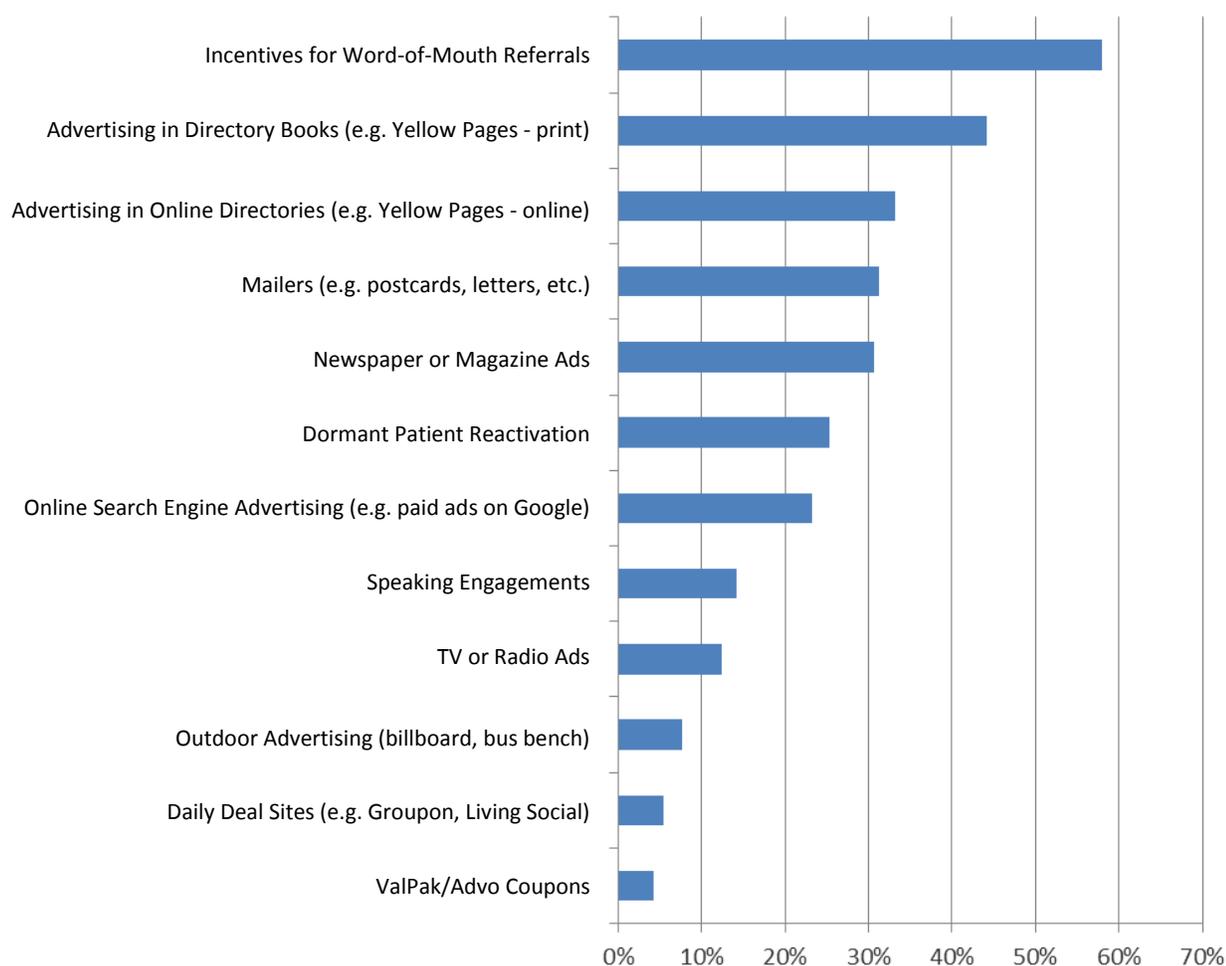
This may also indicate a need for practices to refresh their front office on all the features their current software offers. (For example, if you're a member of PatientActivator, there are free daily Webinars available with a live tech support expert).

PRACTICE MARKETING & STAFFING

In addition to the digital marketing tactics examined above, we also wanted to understand what other marketing activities are being used in the practice – be they traditional channels or new online approaches.

Not surprisingly, the most widely-used activity is incentivizing word-of-mouth referrals (58%). **Word of mouth has always been one of the most effective strategies for dentists, and this is even truer in the age of social media and digital communication.** What's more, 74% of consumers say that recommendations from family and friends influence their decision of whether to choose a dentist.⁹ Having an incentive plan to thank patients for a successful referral is a proven technique. (Note: Always check with your local board about your specific state regulations before implementing a plan)

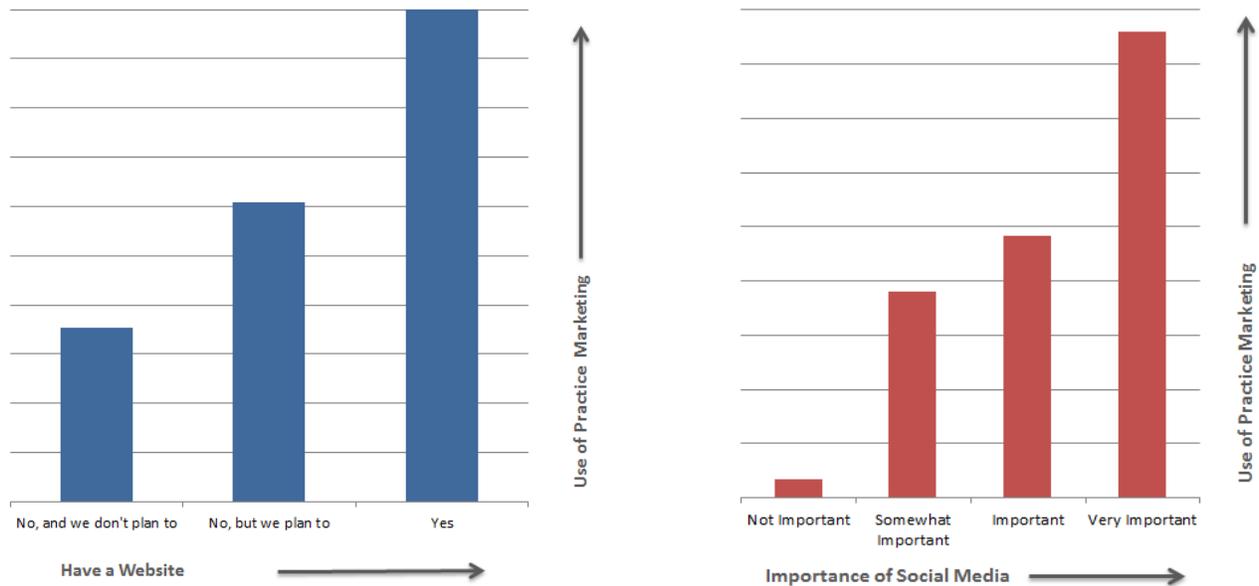
Which of the following other marketing activities does your practice use now?



Printed and online Yellow Page listings are the next most common approach. While there is considerable evidence that consumers are moving away from using these ads (particularly print), the results can vary from area to area. The important caveat, as with any marketing, is to carefully track the results – and only continue if you can see measurable results (i.e. new patients) from the listings. Unfortunately, only 52.2% of respondents say they track their marketing results.

We explored whether there is a relationship between using newer digital marketing techniques (i.e. websites and social media) and general marketing savvy – and indeed there is a very clear connection.

In other words, respondents who are more engaged with websites and social media are also engaged in significantly more marketing activities across the board.



We asked who in the practice is responsible for marketing activities. Responses are almost equally split between dentists and office managers, with front office staff in third place at 23%. The remaining responses are divided among consultants, family members, web programmers, hygienists, a marketing agency and other – all at less than 10%.

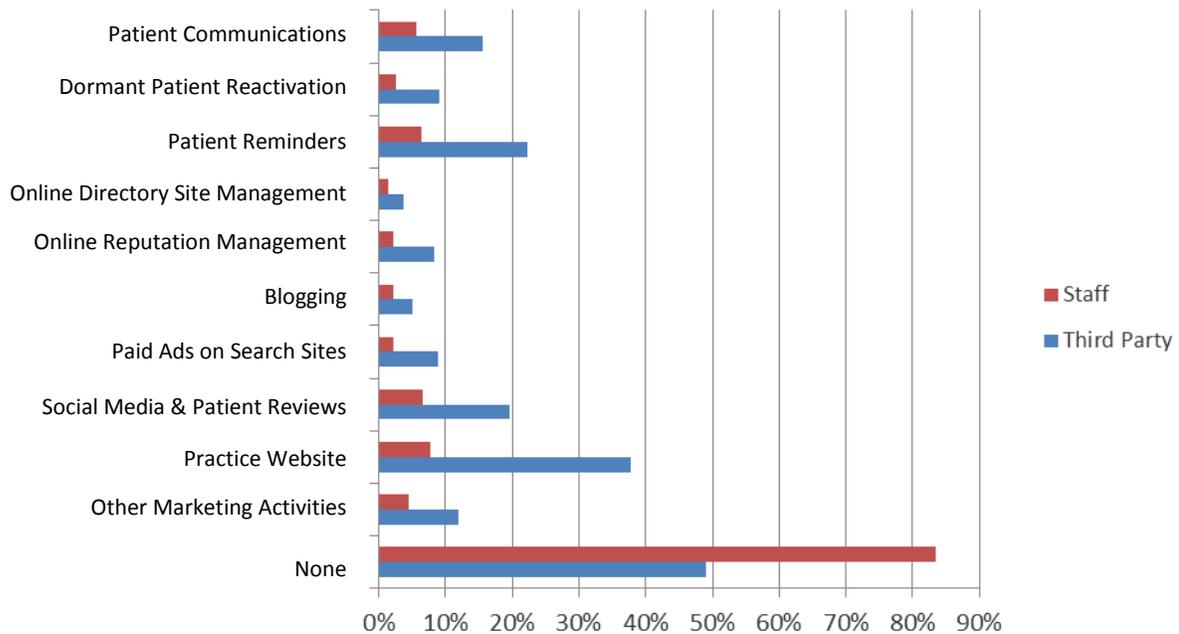
Who typically handles practice marketing activities? (Check all that apply)

Dentist	55.2%
Office Manager	53.9%
Front Office Staff	23%
Marketing Consultant	7.8%
Family Member	7.2%
Web Programmer	6%
Hygienist	5.7%
Marketing Agency	4.3%
Other	7.0%

In our 2012 survey of dental office managers, it was revealed that practice responsibilities have steadily increased over the last few years. To understand how this additional work is being managed in the practice, we asked whether new staff or third party resources had been added in the last two years.

83.5% of respondents report that no staff has been added to support practice marketing activities. However, 51% have added a third-party provider – particularly to support the website (37.8%), patient reminders (22.2%), social media and reviews (19.6%) and patient communication (15.6%).

Has your practice hired a consultant, agency or other third party service provider OR Staff in the last two years to support any of the following activities? (check all that apply)



KEY FINDINGS: Tried and true approaches like referral incentive programs continue to dominate the dental marketing landscape. Dental offices can extend their efficacy even further by incorporating referral messaging into their websites, emails and social media, as well as adding “forward to a friend” links to their newsletters and other electronic promotions.

Long-standing methods including Yellow Pages, mailers and print ads are still used by a significant percentage of respondents. These channels should be closely tracked – and often aren’t – on a regular basis to make sure they continue to yield results (which will depend on the unique demographics of each practice location).

There seems to be a clear connection between use of digital marketing and general marketing prowess. As expected, the most marketing savvy practices are the most likely to value and utilize the newest online marketing tools available.

Dental offices have generally not increased staffing to support new marketing activities, but many have started using outside resources. This trend is likely to continue due to the number of robust dental marketing tools now available for websites, social media, reviews and patient communication. See “Additional Products & Resources” on the final page of this report for information about our suite of marketing products, developed exclusively for the dental industry.

THE FINAL WORD

The state of dental marketing in the digital world is in flux. While the dental community has recently made strides in many areas, it is still largely behind the curve on modern website standards, social media, and leveraging the power of patient reviews. Respondents revealed a considerable level of ambivalence about the importance of these new digital marketing tactics, and this is clearly reflected in their usage.

As a result, the conversation in dentistry may need to shift away from simply outlining what needs to be done, and expand into a more thorough explanation of why (explaining how fully utilizing new digital technologies and online spaces provides significant, measurable benefits to the practice). Continued education about the power of a strong Web presence and online reputation is crucial in elevating the industry and connecting with increasingly tech-savvy patients in the online marketplace.

As sponsors of this report, both AADOM and Futuredontics have strong educational initiatives around new issues in dentistry, including interactive Webinars, whitepapers and more. For a list of free resources, see the final page of this report.

ABOUT FUTURE DONTICS®

Futuredontics®, parent company of **1-800-DENTIST®** and **Patient Activator®**, is the nation's leading provider of dental marketing services. Since 1986, the Los Angeles-based company has dedicated itself to developing powerful products that help dental practices thrive.

Recognized as dentistry's premier new patient leads program, the company's flagship 1-800-DENTIST service has helped over 9 million dental patients nationwide connect with member dentists. Every day, thousands of patients get personally matched to dentists through their 24/7 call center or via 1800dentist.com.

PatientActivator — Futuredontics' communications, social and online reputation solution — increases production and boosts the practice's online presence with automated appointment confirmations and tools for marketing, social media, reviews and much more.

Futuredontics also offer an extensive library of dental marketing resources – including whitepapers, webinars and videos. With unlimited live customer support, dentistry's best marketing products and North America's largest dental referral website, Futuredontics is the proven way for dental practices to grow their patient base and increase production year after year.

For more information about our dental marketing services visit us at www.futuredontics.com

To get a FREE copy of any our additional resources, including whitepapers, videos, webinars and more, visit futuredontics.com/MoreResources.

For info about our suite of dental marketing products, call 1-855-230-1313.

ABOUT AADOM

The American Association of Dental Office Managers (AADOM) is an organization of professional office managers, practice administrators, patient coordinators, insurance and financial coordinators, and treatment coordinators of general and specialized dental practices. The largest association of its kind, it is their mission to provide members with networking, resources and education to help them achieve the highest level of professional development.

For more information about AADOM please call 732-842-9977 or visit dentalmanagers.com. You can also email: info@dentalmanagers.com.

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