

# General Dental Council

## Segmentation report

Report prepared for:

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Communications and  
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**djs**  
research

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# Segmentation report

## Executive summary

The GDC commissioned DJS, an independent market research agency, to undertake research to explore and understand the most effective channels for the GDC to use to communicate with key audiences. As part of the analysis, DJS conducted a segmentation (the process of dividing a sample of respondents into segments based on attitudes and behaviours) to help inform how the GDC engages with registrants in a more targeted and personalised manner. A total of 4101 registrants were included in the segmentation. The sample is segmented on the basis of responses given across key survey questions including: feelings towards the GDC (Q13), opinions on the frequency of GDC communication (Q18a), and interest in trends in the dental sector (Q33). The segmentation process involves both factor analysis and cluster analysis<sup>1</sup>.

The segmentation reveals 5 different segments:

- **Sector informed, GDC advocates** – a large segment, who actively keep up to date with trends in the dental sector and are highly engaged with, and hold positive views about, the GDC. Happy with the frequency of contact from the GDC, always open emails and often visit the website. With this segment there is an opportunity for the GDC to use this group to help change others' opinions of the GDC.
- **Sector informed, GDC critics** – smallest segment, who actively keep up to date with trends in the dental sector but are less engaged with, and hold quite negative views about, the GDC. Rarely open GDC emails or visit the website, but encouraging they would like more frequent contact with the GDC (but need to be interested enough to open them). There is an opportunity for the GDC to engage with this segment on topics of interest and use this to change their opinions on the GDC.
- **Time-pressed willing learners, undecided about GDC** – represent ~1/5 of registrants, would love to learn more about the dental sector but are too time-poor. They have mixed opinions about the GDC, but do find communications from the GDC useful and would like more frequent contact. There is an opportunity for the GDC to engage with this segment through social media in shorter more digestible formats such as infographics and short videos.
- **Willing learners, contrasting views about GDC** – the largest segment, who would like to learn more about the dental sector but only if the information is available on the channels they currently use. Respect the GDC but also hold some negative views about the GDC. Are either happy with current contact frequency or would like to hear more.

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<sup>1</sup> Factor analysis looks at the patterns in the data. Cluster analysis is a statistical technique that groups participants into 'clusters'. Each cluster is a group of relatively homogeneous participants who share common characteristics. They are dissimilar to those outside the cluster.



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There is an opportunity for the GDC to engage more effectively with this group by using the channels they frequent often.

- **Uninterested in sector news, GDC critics** – small segment, who are not interested in news, learning more about the dental sector, or the GDC. They would like to hear less from the GDC and are likely to have relatively negative perceptions of the GDC. There is an opportunity for the GDC to do some further follow-up research with this segment to understand more about what is driving their opinions and how to change them.



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## Introduction

The General Dental Council (GDC) was established over 60 years ago and is the UK-wide statutory regulator of almost 42,000 dentists and almost 68,000 dental care professionals. The primary purpose of the GDC is to protect patient safety and maintain public confidence in dental services.

In January 2017, the GDC published a discussion document called *Shifting the Balance (StB)*, which laid out the GDC's proposals for the future of dental regulation, ultimately making the system better for patients and fairer for dental professionals. StB consists of four main areas of proposals including; 1) Moving upstream, 2) First tier complaints, 3) Working with partners, and 4) Refocusing fitness to practise.

Within the 'moving upstream' category there is a focus on more effective engagement with current and future dental professionals. The GDC commissioned DJS, an independent market research agency, to undertake research to explore and understand the most effective channels for the GDC to use to communicate with key audiences. As part of the analysis, DJS conducted a segmentation (the process of dividing a sample of respondents into segments based on attitudes and behaviours) to help inform how the GDC engages and communicates with registrants in a more targeted and personalised manner.

## Methodology

A total of 4101 registrants were included in the segmentation, reflective of the number of registrants who completed the Communications Survey. The segmentation is considered to be representative as this sample has been weighted to match the profile of the GDC's registrant database.

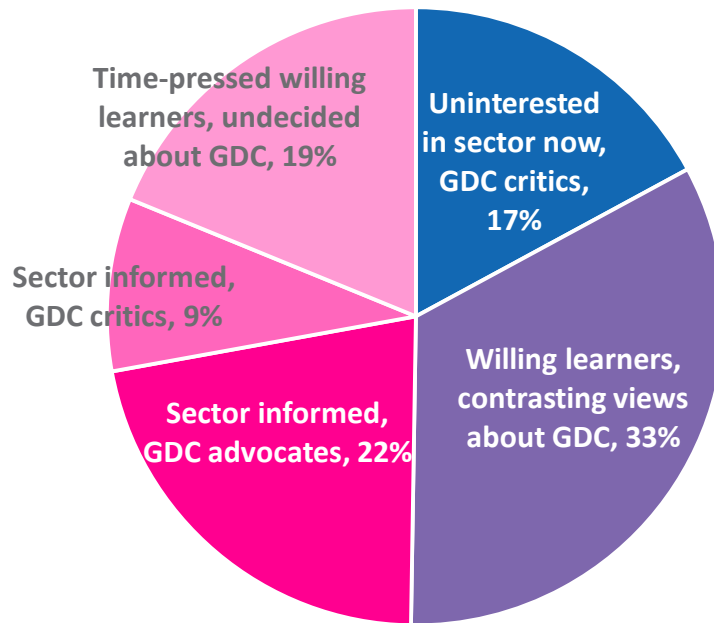
The sample is segmented on the basis of responses given across key survey questions. The segmentation is based on feelings towards the GDC (Q13), opinions on the frequency of GDC communication (Q18a), and interest in trends in the dental sector (Q33).

The segmentation process involves both factor analysis and cluster analysis. Factor analysis looks at the patterns in the data. Cluster analysis is a statistical technique that groups participants into 'clusters'. Each cluster is a group of relatively homogeneous participants who share common characteristics. They are dissimilar to those outside the cluster.

The segmentation reveals 5 different segments.



**Registrant segments (n=4101)**





**Three of the segments (in pink) are relatively informed about the dental sector but have different attitudes towards the GDC.**

### **Sector informed, GDC advocates**

This is the largest of the informed segments (n=897) and represents 22% of all registrants. There is a relatively small proportion of dentists represented in this segment (27%), with higher proportions of dental hygienists and dental therapists compared to other segments. Registrants in this segment are more likely to be aged 41-60 years compared to the others and these registrants are the least likely segment to work over 40 hours each week.

Nearly all registrants in this segment actively keep up to date with trends in the dental sector (91%). As with the other segments, they mainly receive communication from the GDC via email. Two-thirds (67%) will *always* open their emails, significantly more than any other segment. Email is their preferred channel (89%), followed by the GDC website (69%) – they are significantly more interested in this channel than other segments. They currently visit it more often too. Almost all users (95%) find it useful (significantly more than other segments). Their main reasons for visiting the GDC website are:

- To pay my annual renewal fee (71%) - similar to other segments
- Education and CPD (66%) - more than other segments (next highest - 55%)
- Standards and guidelines (62%) – a lot more than other segments (next highest - 45%)
- For news and updates (56%) – a lot more than other segments (next highest - 38%)

This group are also more open to other channels of communication from the GDC. Significantly more cite conferences, workshops, articles and journals, compared to other segments. They are also interested in a GDC app (55%) and webinars (35%).

They are the most likely segment to be 'very happy' with the frequency of contact from GDC and to find current communications from the GDC useful. They are positively engaged with the GDC, being the segment most likely to highly respect the work that the GDC does (80%) and feel that the GDC is improving (63%).

Registrants in this segment are the most likely to watch TV news channels/shows, typically watching BBC News (88%), ITV News (48%) and Sky News (27%).

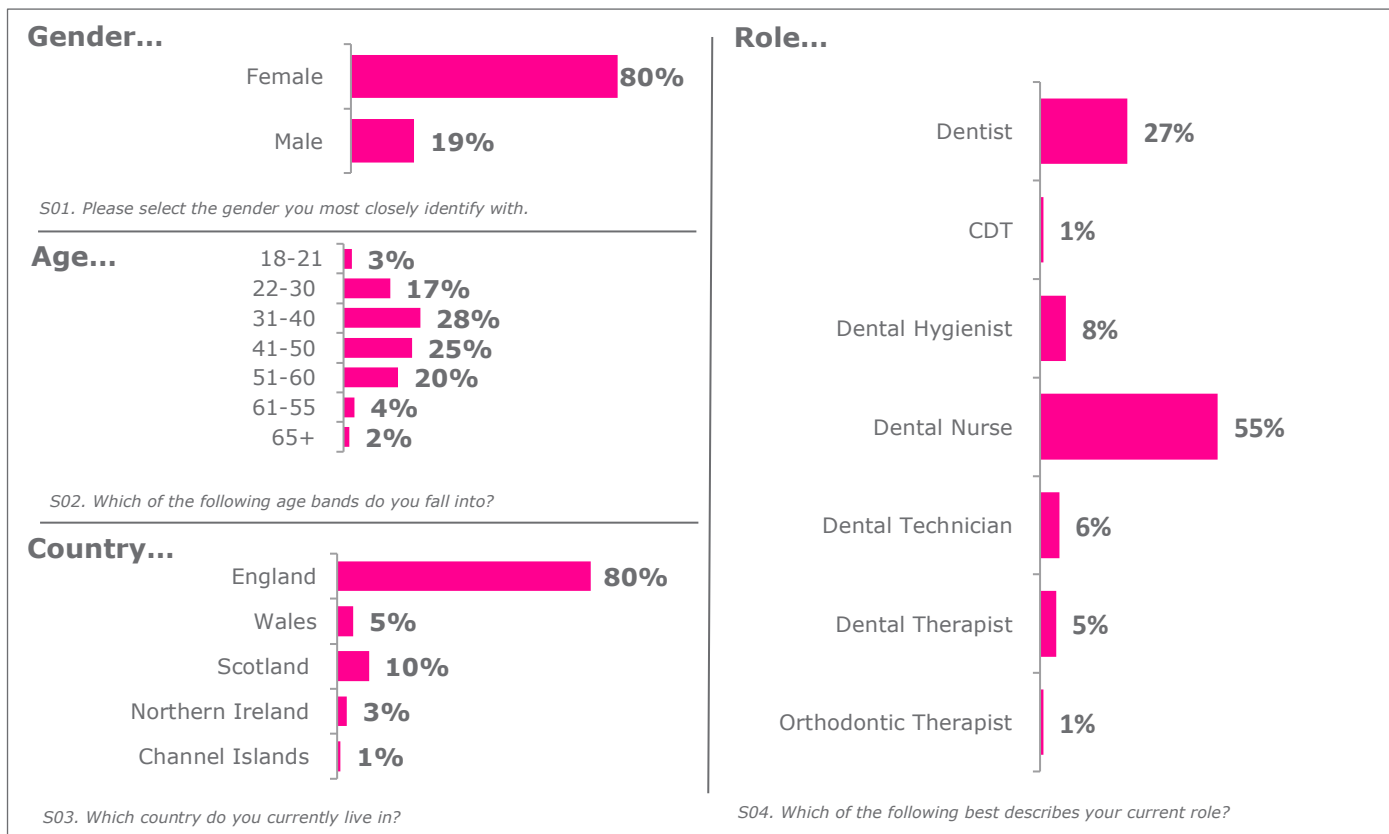
### **Implications for the GDC's communications with this segment:**

- **Given their positivity and engagement, there is an opportunity for the GDC to use this group to help change others' opinions of the GDC.**
- **For example, the GDC could think about creating a team of advocates who are consulted on FtP procedures, or who visit universities to help engage future dental professionals.**



- We recommend more qualitative research to explore what it is about this segment that makes them more actively engaged and positive about the GDC.

## Demographics (n=897):

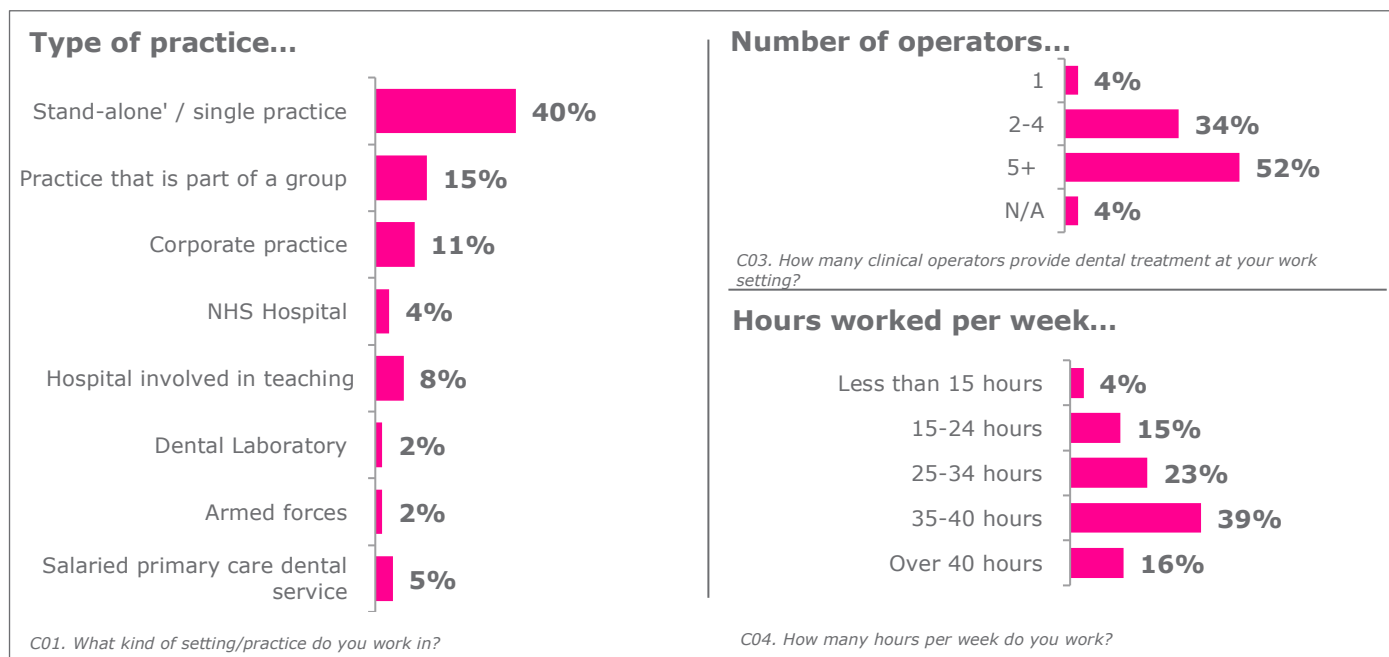


Data may not sum to 100% due to rounding, multi-code questions, and also 'other' and 'prefer not to say' are not presented



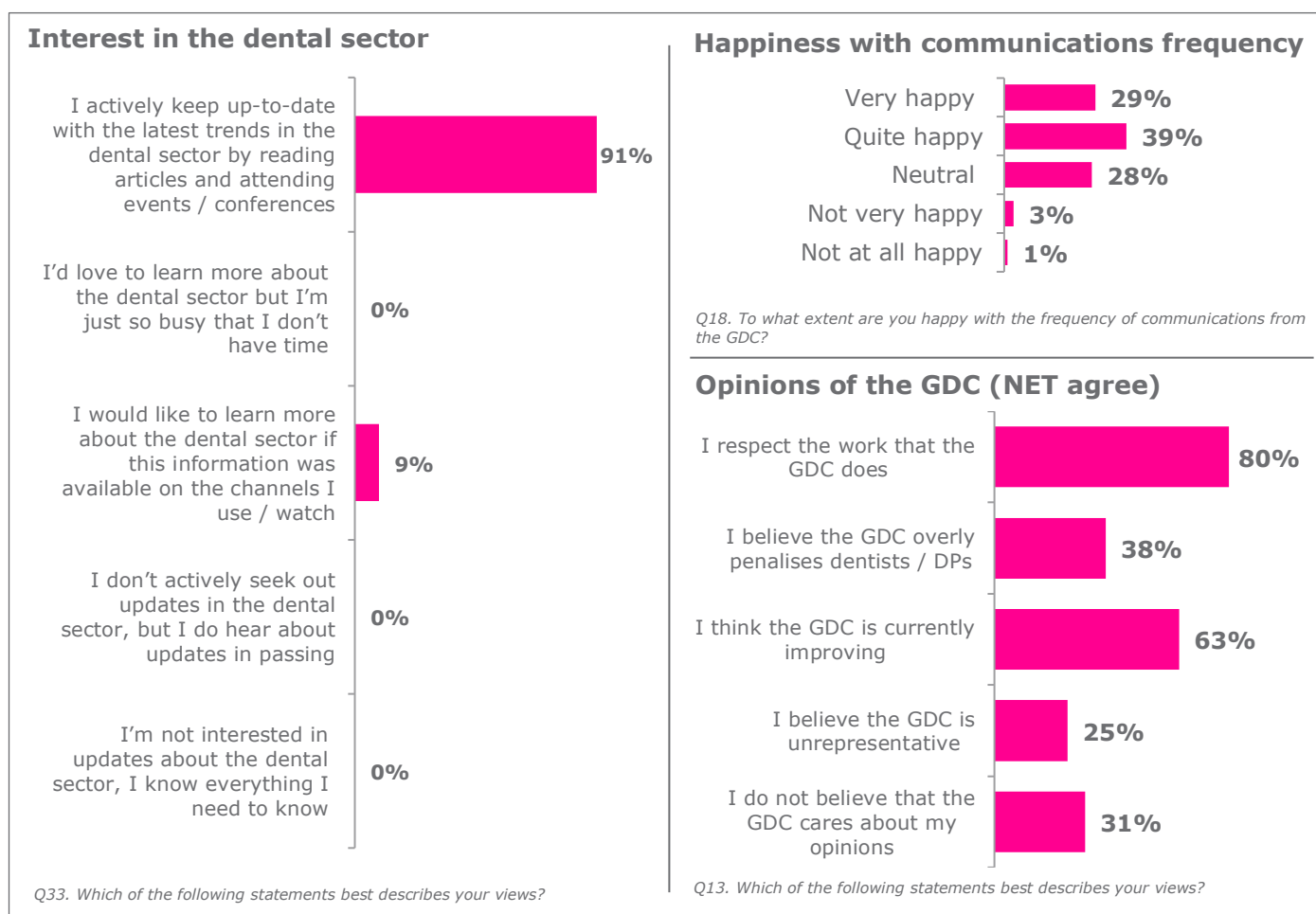


## Practice setting (n=897):



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## Attitudes and opinions (n=897):



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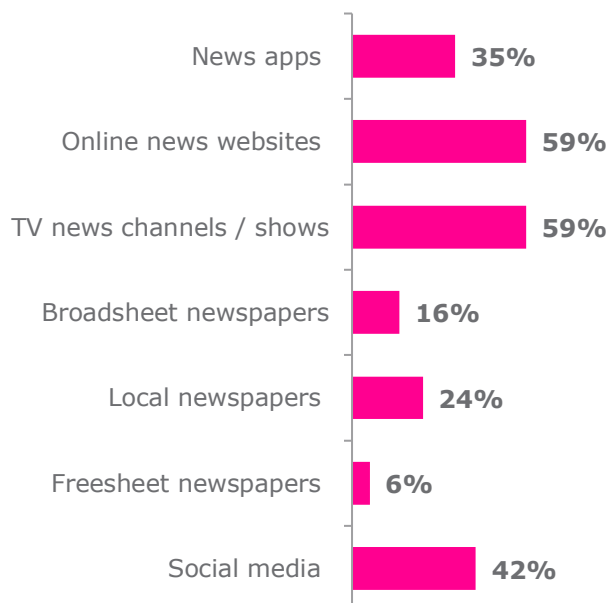




## Behaviours (n=897):

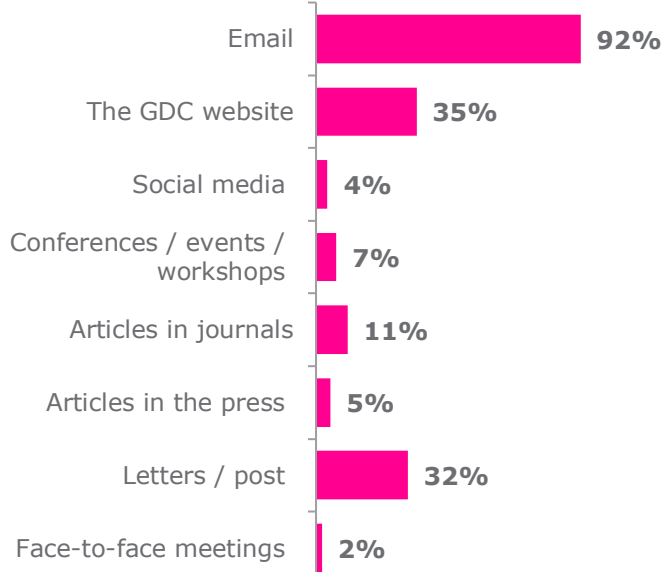
Data may not sum to 100% due to rounding, multi-code questions, and also 'other' and 'prefer not to say' are not presented

### General news updates preferences...



Q31. Which of the following do you regularly use for general news updates?

### Communication channels with the GDC...



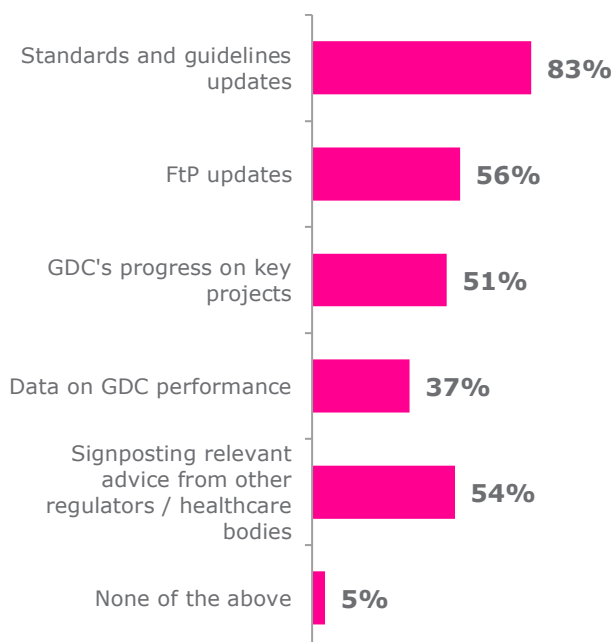
Q16. How does the GDC typically communicate with you?

### Initiated contact with the GDC...



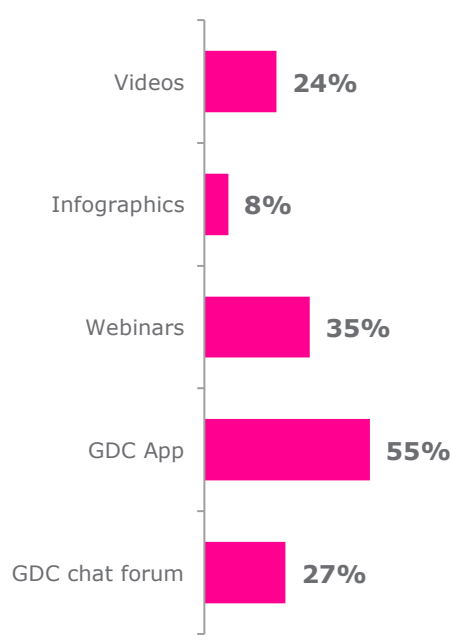
Q26. Have you ever initiated contact with the GDC?

### Future communications from the GDC



Q24. Would you like to receive any of the following from the GDC?

### Future channels from the GDC



Q25. Which of the following do you think the GDC should also consider using?



## Sector informed, GDC critics

This is the smallest segment (n=371), representing 9% of all registrants. There are a significantly higher proportion of dentists in this segment compared to all others (81%) and members of this group are significantly more likely to be male. A higher proportion of this segment work in a stand-alone, single practice compared to other segments and they are significantly more likely to work over 35 hours each week (65%) compared to all other groups.

Despite the longer working hours, registrants in this segment are significantly more likely to actively keep up-to-date with trends in the dental sector compared to all other segments (99%). However, they are less engaged with the GDC. They are the least likely segment to have initiated contact with the GDC and only visit the GDC website a couple of times each year (46%). In addition, less than half always open their emails from the GDC (47%).

Driving this might be their negative views of the GDC. They are significantly less likely to agree with the positive statements about the GDC (respect the work that the GDC does and the GDC is improving) and are significantly more likely to agree with the negative statements about the GDC (the GDC over penalises dental professionals, is unrepresentative, and does not care about their opinions).

Whilst only a fifth of this segment are happy with the frequency of communication from the GDC at the moment, all those not happy are so because they want more frequent contact. Their preferred channel is email; however, they need to be interested enough to open it! They are interested in receiving:

- Standards and guidelines updates (75%)
- Signposting advice from other regulators and healthcare providers (55%)
- Data on GDC performance (49%)

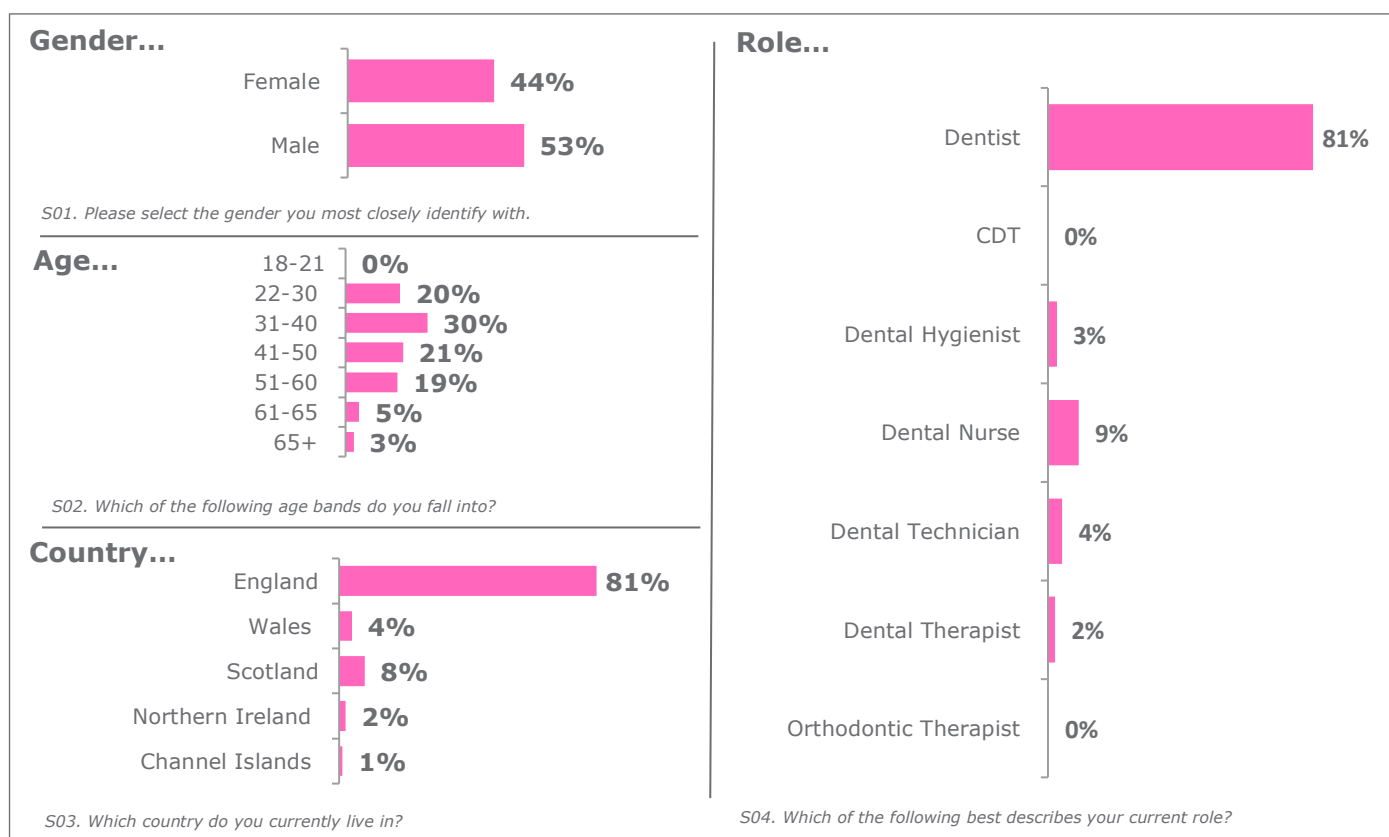
They are less likely to access the website or use social media to receive this information and there is the lowest level of interest in a GDC app amongst this segment.

### Implications for the GDC's communications with this segment:

- **This is the smallest segment. It comprises primarily of dentists with negative views of the GDC. However, they like to keep up to date with the sector and want to hear more from the GDC.**
- **The GDC needs to engage with them on topics of interest and use this as an opportunity to change their opinions on the GDC.**
- **They feel like the GDC doesn't care about their opinions, so there is an opportunity to demonstrate that this is not the case by opening up dialogue with them.**

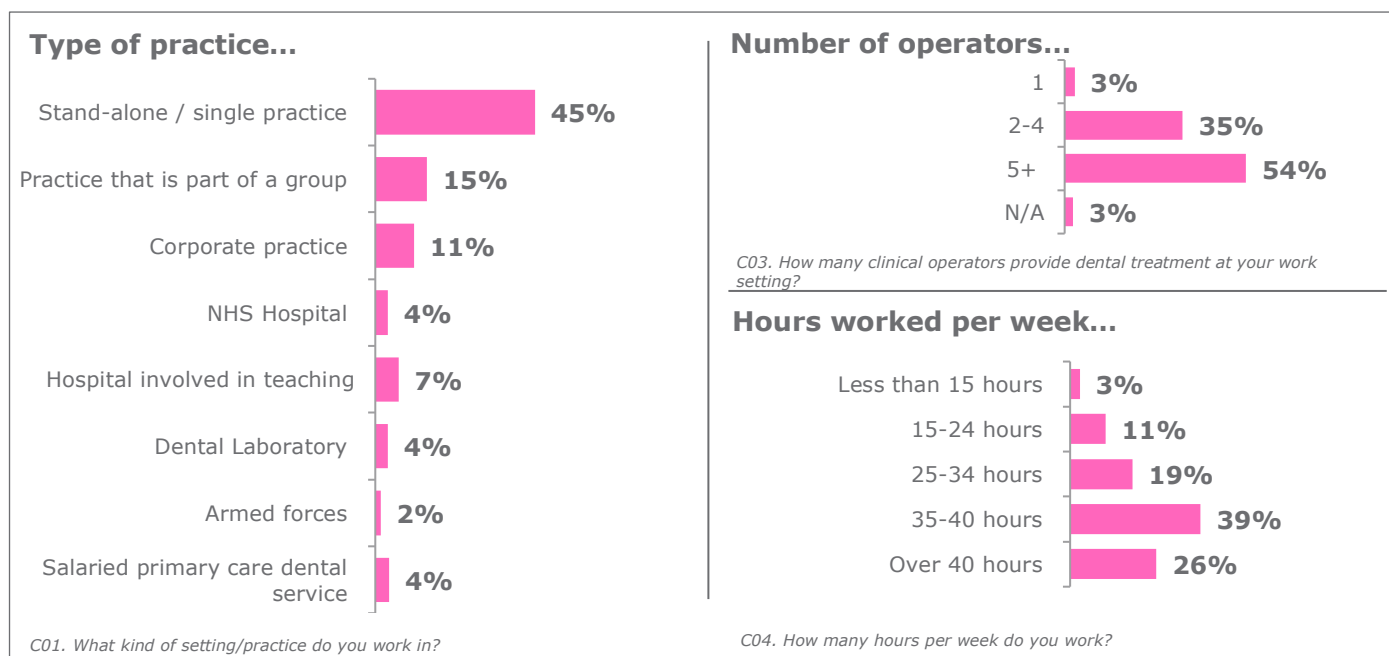


## Demographics (n=371):



Data may not sum to 100% due to rounding, multi-code questions, and also 'other' and 'prefer not to say' are not presented

## Practice setting (n=371):

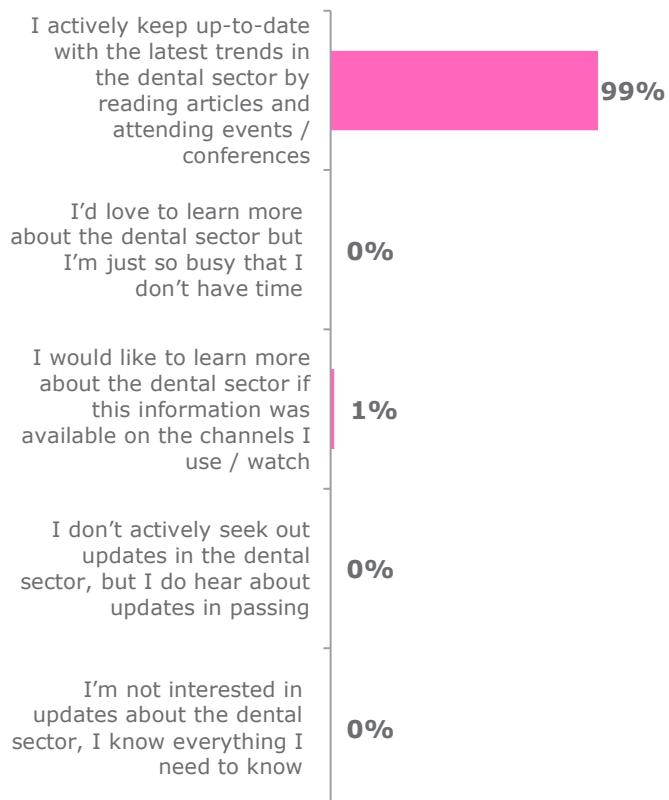


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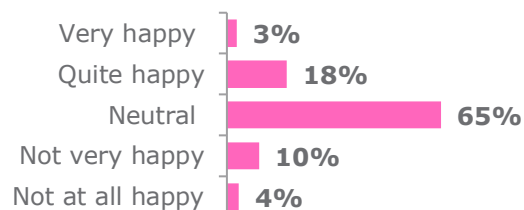
## Attitudes and opinions (n=371):

### Interest in the dental sector



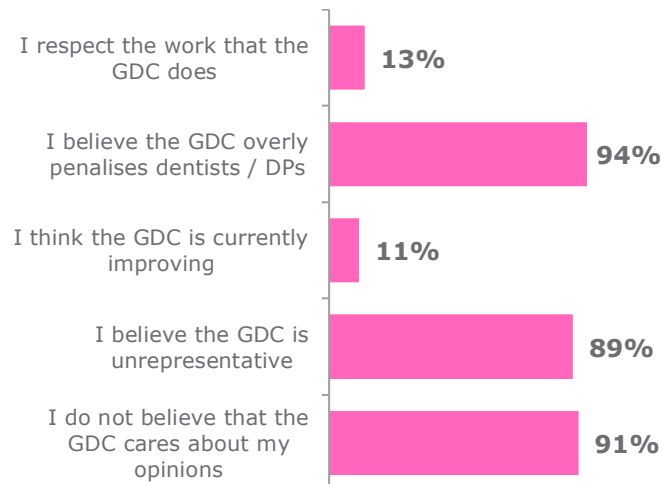
Q33. Which of the following statements best describes your views?

### Happiness with communications frequency



Q18. To what extent are you happy with the frequency of communications from the GDC?

### Opinions of the GDC (NET agree)



Q13. Which of the following statements best describes your views?

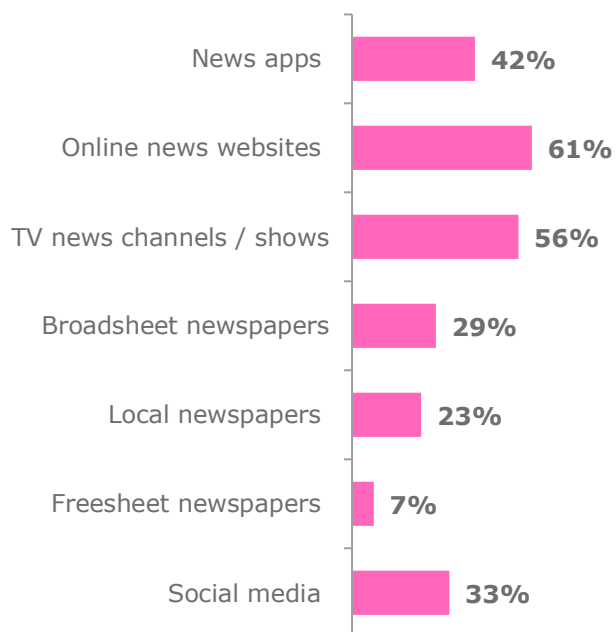
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## Behaviours (n=371):

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### General news updates preferences...



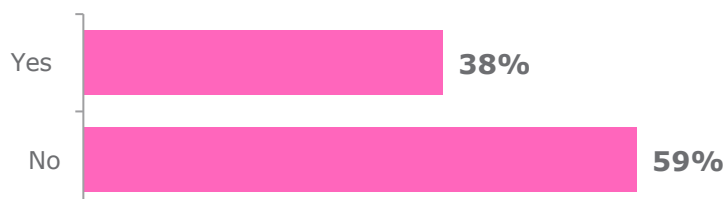
Q31. Which of the following do you regularly use for general news updates?

### Communication channels with the GDC...



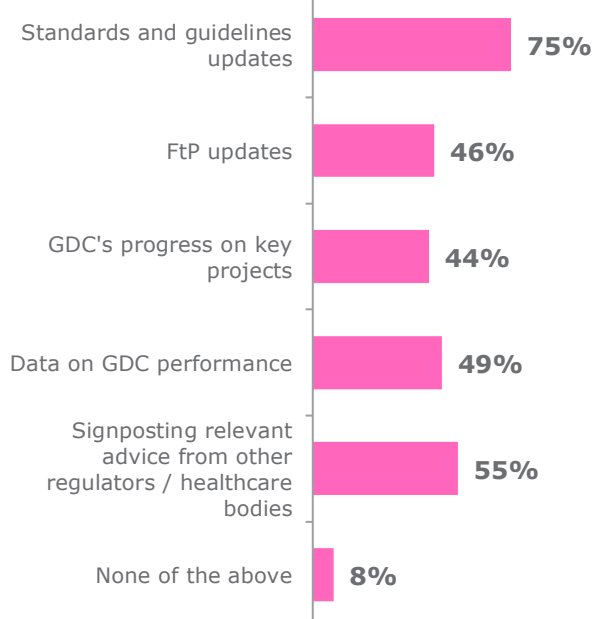
Q16. How does the GDC typically communicate with you?

### Initiated contact with the GDC...



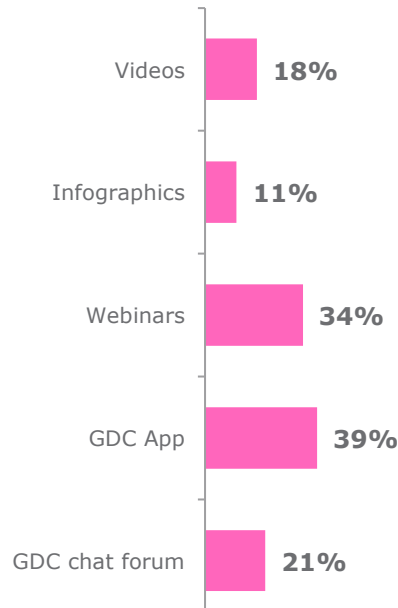
Q26. Have you ever initiated contact with the GDC?

### Future communications from the GDC



Q24. Would you like to receive any of the following from the GDC?

### Future channels from the GDC



Q25. Which of the following do you think the GDC should also consider using?



## Time-pressed willing learners, undecided about the GDC

This is the second largest of the informed segments (n=771), representing 19% of all registrants. This segment has a high proportion of females (80%) and almost two thirds are aged 22 to 40 years old. Almost six in ten (58%) work more than 35 hours a week.

Registrants falling into this segment are too busy to learn about the dental sector but would love to learn more.

Opinions on the GDC are mixed. They are less negative than the 'sector informed, GDC critics' and the 'uninterested in sector new, GDC critics', but not as positive as the 'sector informed, GDC advocates' and the 'willing learners, contrasting views about the GDC'.

Registrants in this segment keep up to date with news via social media, in particular Facebook (70%) and Instagram (46%). The main way the GDC communicates with them is email (89%), but only 47% always open their emails. Only 62% claim to receive the newsletter, though four fifths of them who do believe it is useful (79%).

Less than half are happy with the frequency of communications from the GDC. Some are neutral but all of those not happy want more frequent communication. Nearly all are interested in receiving more information from the GDC with updates on standards and guidance the most popular (76%).

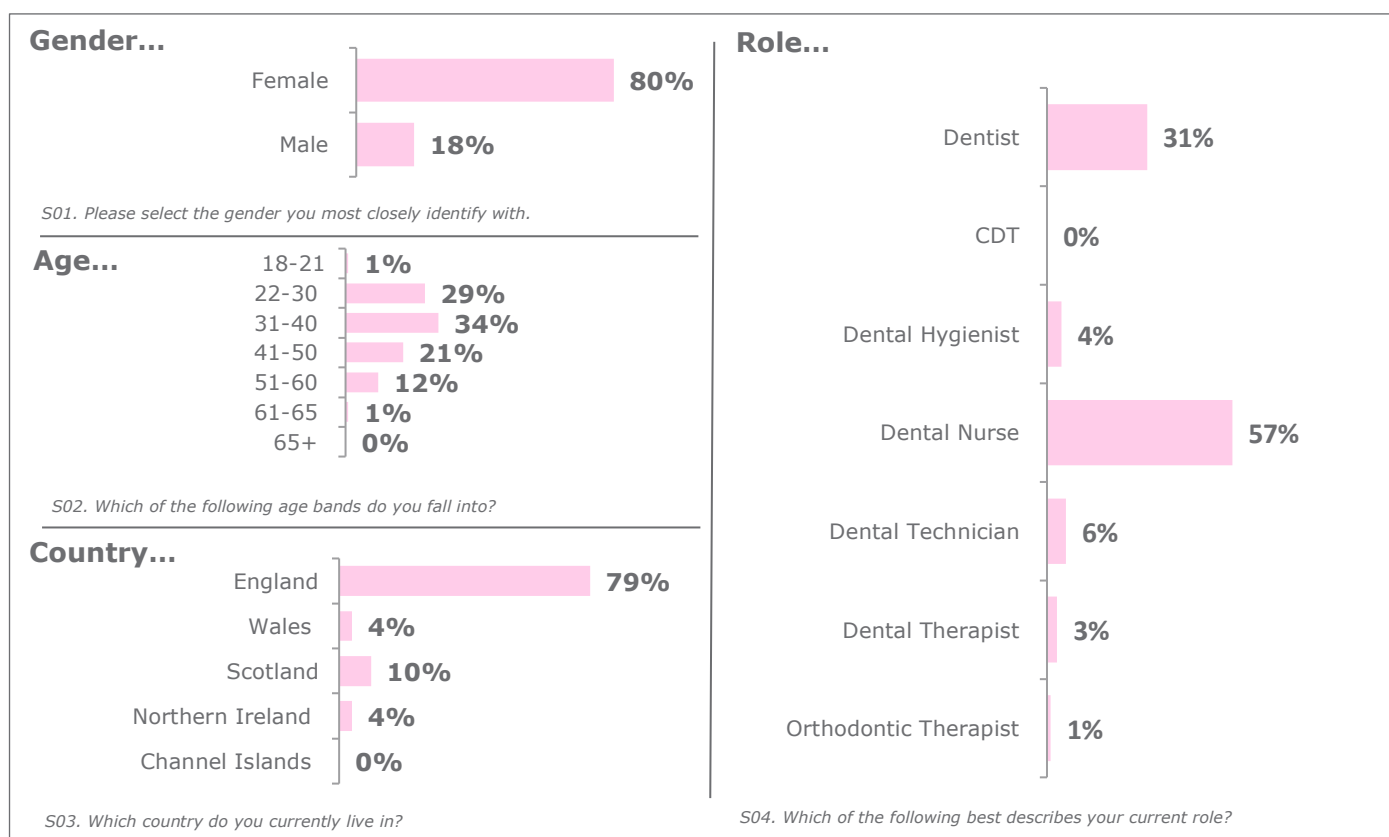
There are high levels of interest in a GDC app (61%), higher than any other segment. Around a quarter are interested in the following channels – videos (24%); webinars (27%) and chat forums (23%). This presents the GDC with an opportunity to communicate with this time pressed group.

### Implications for the GDC's communications with this segment:

- **Registrants in this segment want to engage more but consider themselves to be time-poor. There is an opportunity to engage with this audience through social media in shorter more digestible formats such as infographics and short videos.**

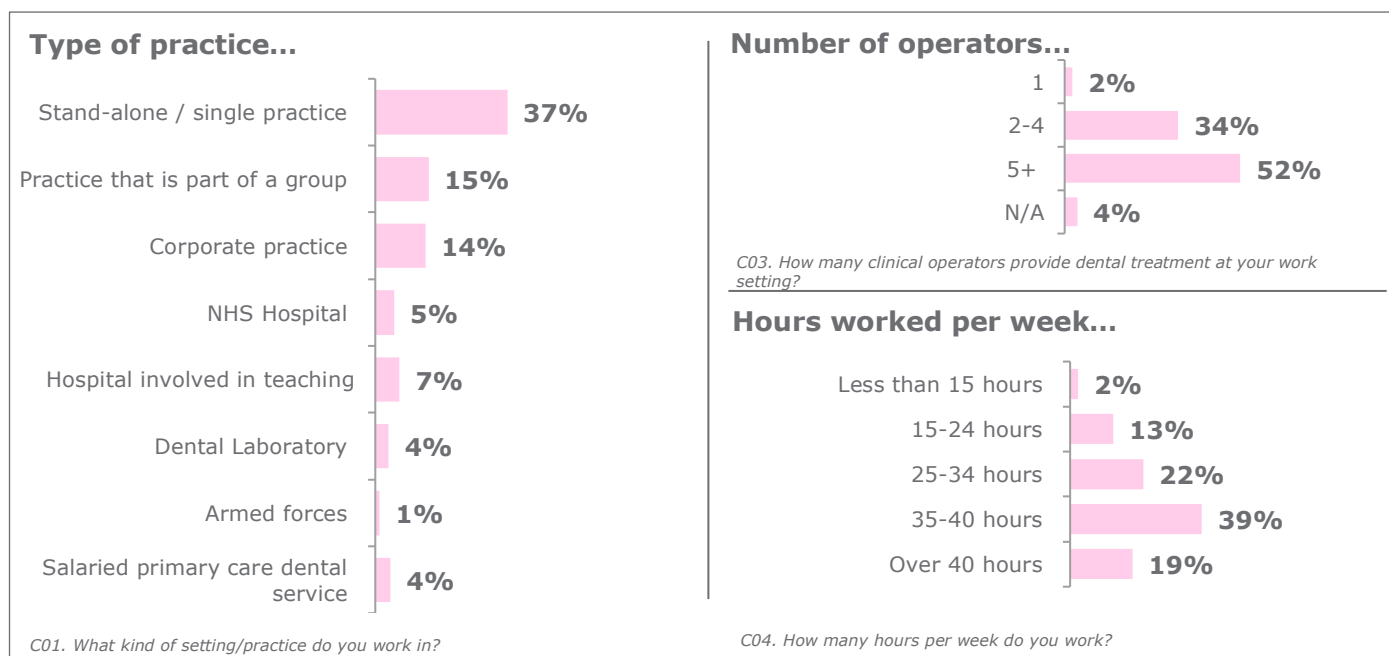


## Demographics (n=771):



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## Practice setting (n=771):



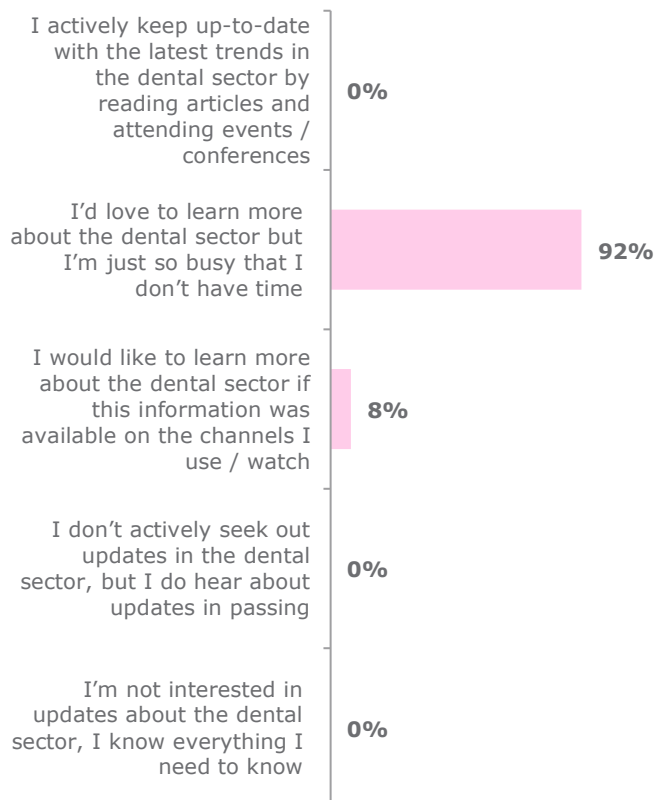
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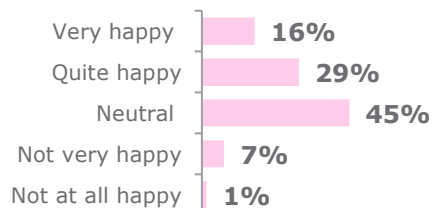
## Attitudes and opinions (n=771):

### Interest in the dental sector



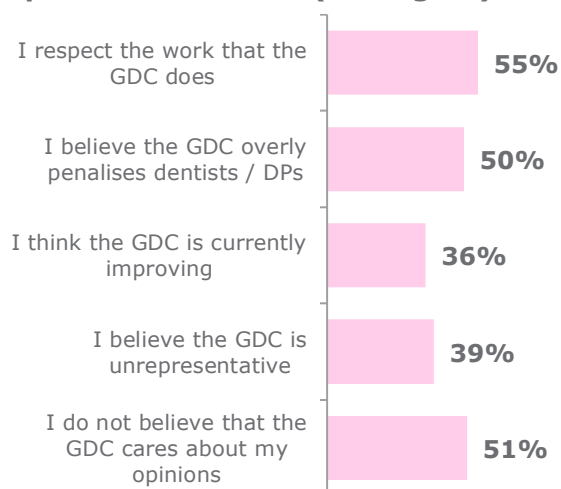
Q33. Which of the following statements best describes your views?

### Happiness with communications frequency



Q18. To what extent are you happy with the frequency of communications from the GDC?

### Opinions of the GDC (NET agree)



Q13. Which of the following statements best describes your views?

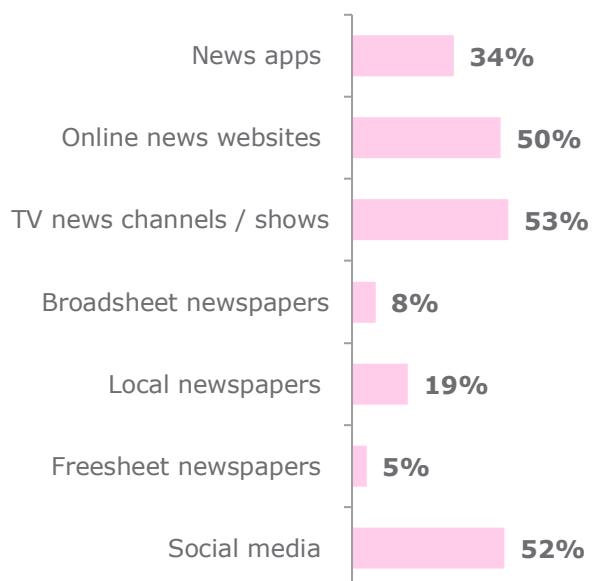
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## Behaviours (n=771):

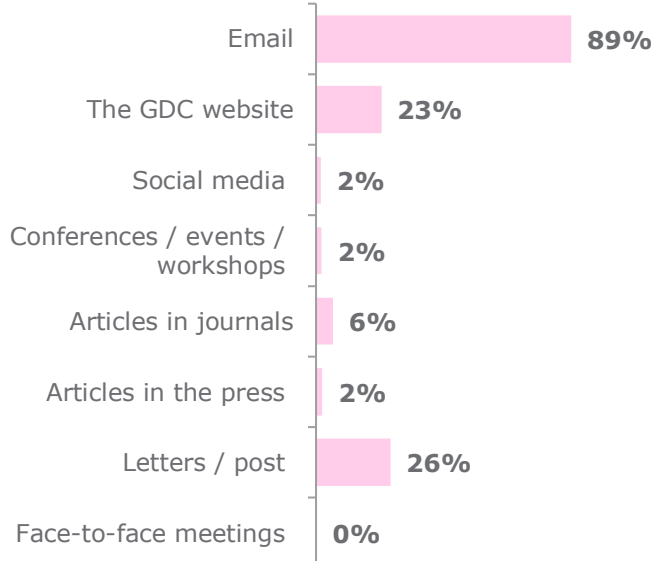
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### General news updates preferences...



Q31. Which of the following do you regularly use for general news updates?

### Communication channels with the GDC...



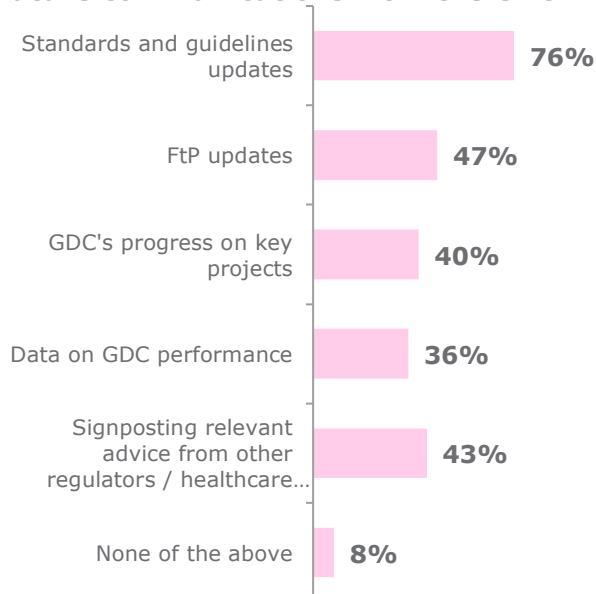
Q16. How does the GDC typically communicate with you?

### Initiated contact with the GDC...



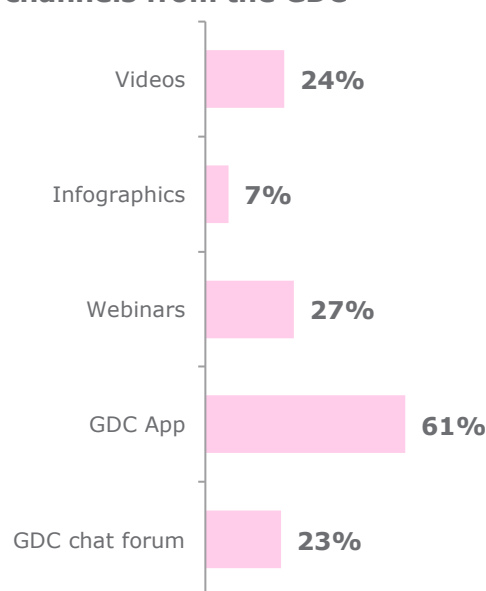
Q26. Have you ever initiated contact with the GDC?

### Future communications from the GDC



Q24. Would you like to receive any of the following from the GDC?

### Future channels from the GDC



Q25. Which of the following do you think the GDC should also consider using?



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## **Willing learners, contrasting views about GDC**

This is the largest segment (n=1360), representing a third of registrants. This segment has the highest proportion of females and dental nurses. There is a high proportion of younger age cohorts in this segment (22-30 years). They are more likely than other segments to work less than 24 hours each week.

Registrants in this segment would engage more with the sector if the information was available on channels they currently use / watch. Registrants in this segment are frequent users of social media including Facebook (70%), Instagram (47%) and YouTube (39%). There is interest in a GDC app (59%) and some interest in webinars (27%), videos (21%) etc. as well.

These registrants typically interact with the GDC via email and the majority are happy with the frequency of contact from GDC. Those not happy would generally like to hear from the GDC more frequently (64%).

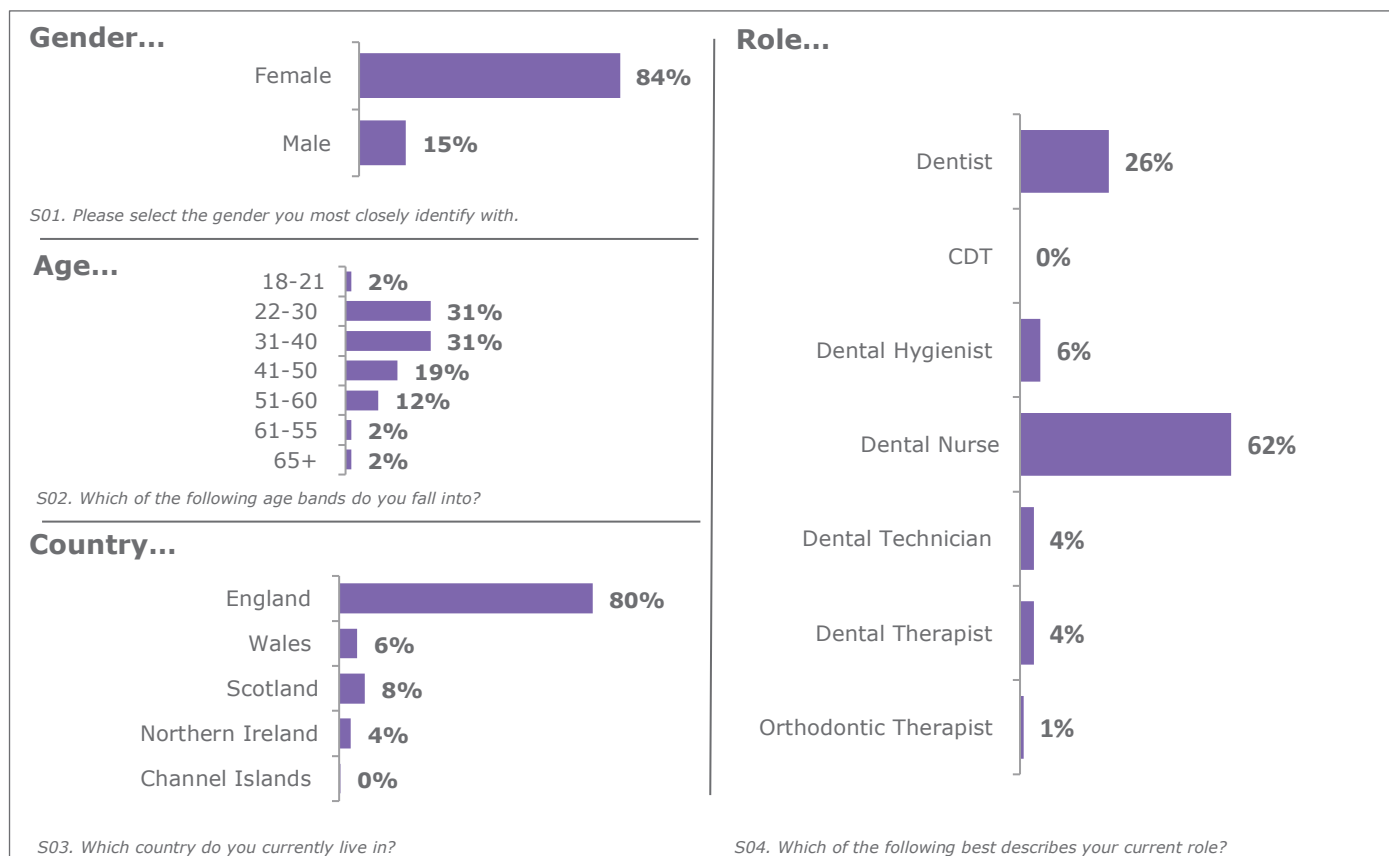
This segment is the second most positive of the segments about the GDC, however, between 33% and 43% still agree with the more negative statements.

### **Implications for the GDC's communications with this segment:**

- **This segment are quite happy with the level of contact and communication they receive from the GDC. However, there is an opportunity for the GDC to communicate with this group more as they would like to receive more frequent communications from the GDC (via email and the GDC website).**
- **However, they are slightly less engaged than the first segments, only keeping up with the sector if updates are available on the channels they regularly use. There is an opportunity for the GDC to engage more effectively with this group by using the channels they frequent often (social media, TV news channels and news apps).**

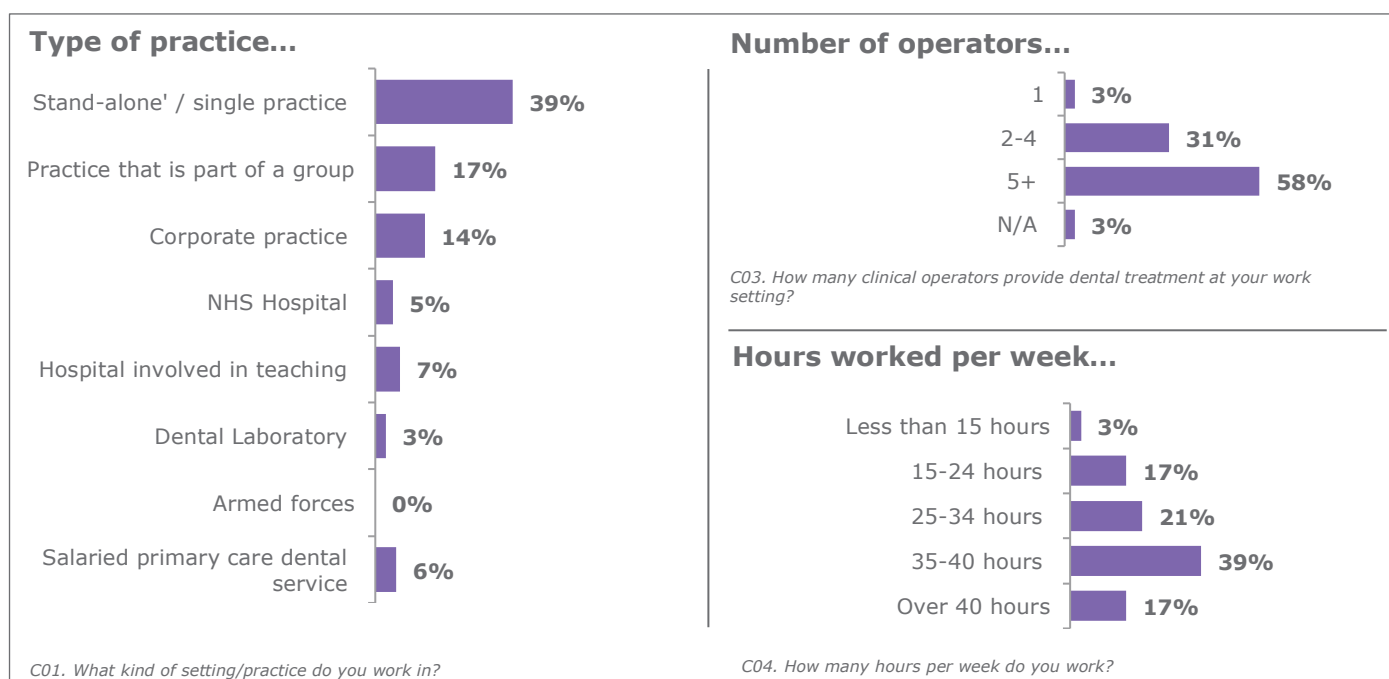


## Demographics (n=1360):



Data may not sum to 100% due to rounding, multi-code questions, and also 'other' and 'prefer not to say' are not presented

## Practice setting (n=1360):

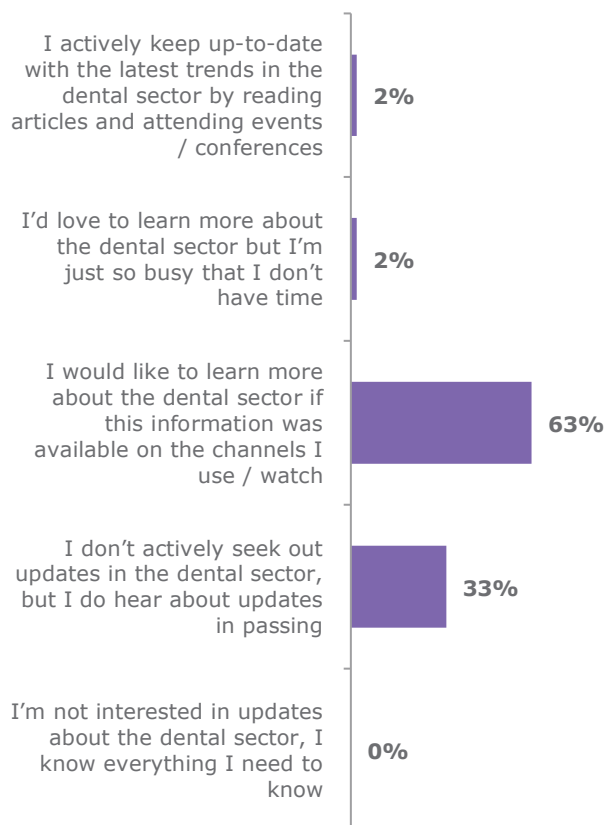


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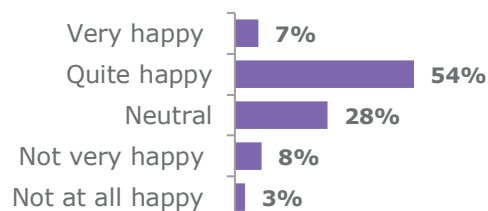
## Attitudes and opinions (n=1360):

### Interest in the dental sector....



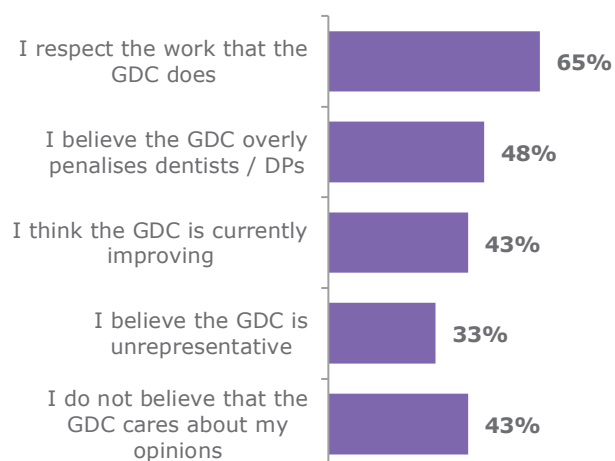
Q33. Which of the following statements best describes your views?

### Happiness with communications frequency



Q18. To what extent are you happy with the frequency of communications from the GDC?

### Opinions of the GDC (NET agree)



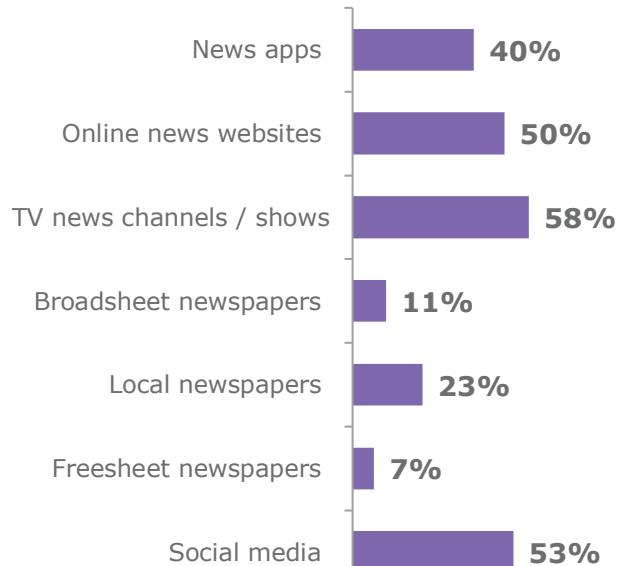
Q13. Which of the following statements best describes your views?

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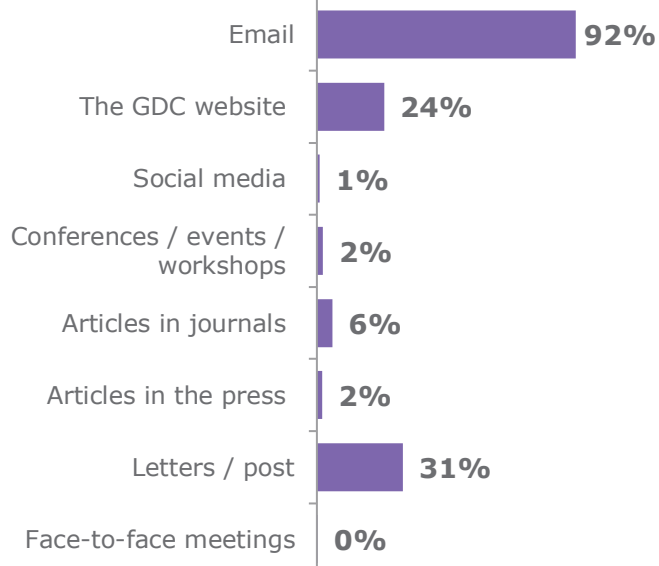


**Behaviours (n=1360):** Data may not sum to 100% due to rounding, multi-code and exclusion of 'other'.

**General news updates preferences...**



**Communication channels with the GDC...**



Q31. Which of the following do you regularly use for general news updates?

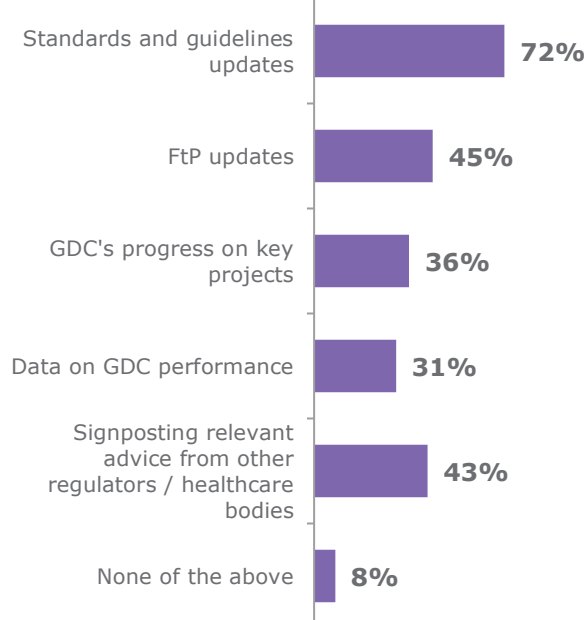
Q16. How does the GDC typically communicate with you?

**Initiated contact with the GDC...**



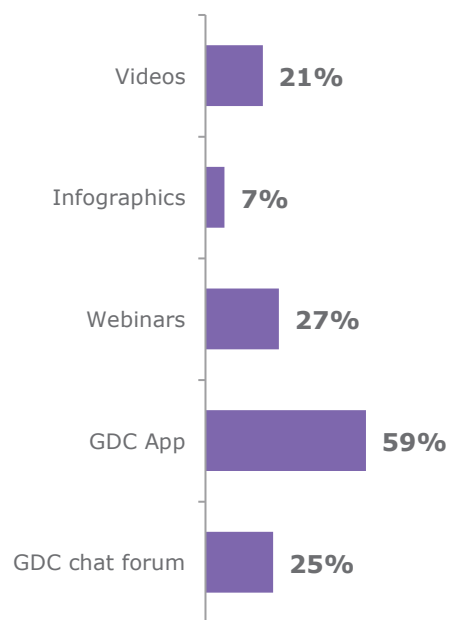
Q26. Have you ever initiated contact with the GDC?

**Future communications from the GDC**



Q24. Would you like to receive any of the following from the GDC?

**Future channels from the GDC**



Q25. Which of the following do you think the GDC should also consider using?



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## **Uninterested in sector news, GDC critics**

This is the 2<sup>nd</sup> smallest segment (n=702), representing just under a fifth of registrants. This segment is made up of 73% females and 27% males. It transcends all the age groups and roles.

Registrants who fall into this segment do not actively seek out updates in the sector and are more likely to hear them in passing. They are the most likely segment to be unhappy with the frequency of contact from GDC and this is because they would like less frequent contact. They are more likely to agree with the negative statements about the GDC (believe the GDC is unrepresentative, overly penalises dentists / DPs and does not care about their opinions) and are less likely to agree with the positive statements about the GDC, though not to the same degree as the 'sector informed, GDC critics'.

Registrants in this segment are the least likely to regularly keep up to date with news via any channel, though if they do consume the news it is most likely to be via TV news channels (mainly the BBC, 88%) or online news websites (mainly BBC News, 79%). This segment is also the least likely segment to regularly interact with the GDC via any channel or have initiated contact with the GDC. There are low levels of interest in any of the channels suggested to them in the survey or the types of information the GDC could provide. Even email is only selected by a third.

Thus, this group represents the GDC with a challenge. One way in, may be a GDC app with 44% interested, though interest levels are lower than all other segments.

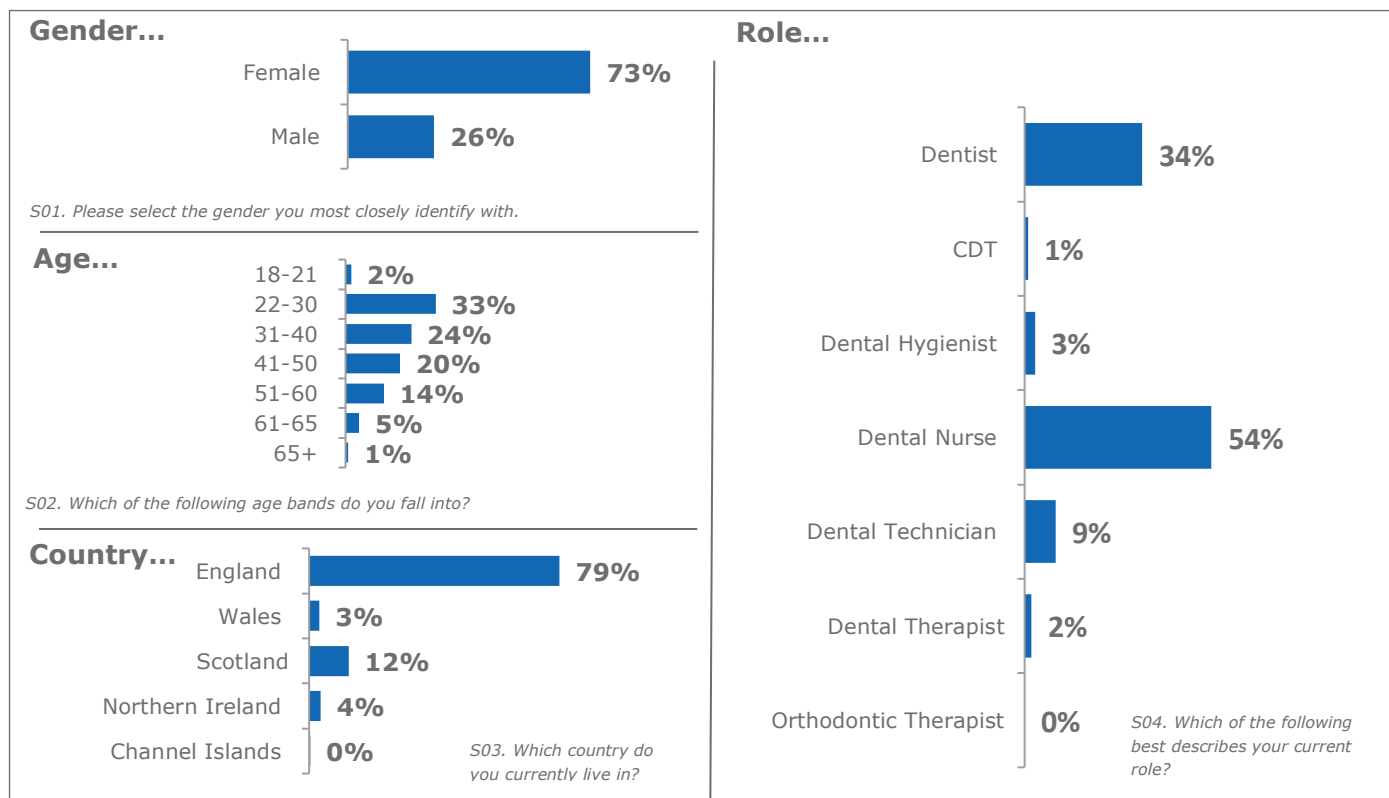
### **Implications for the GDC's communications with this segment:**

- **The recommendation for this segment would be to engage with them on a more personal level, for example some further follow-up research to understand more about what is driving their opinions and how to change them.**



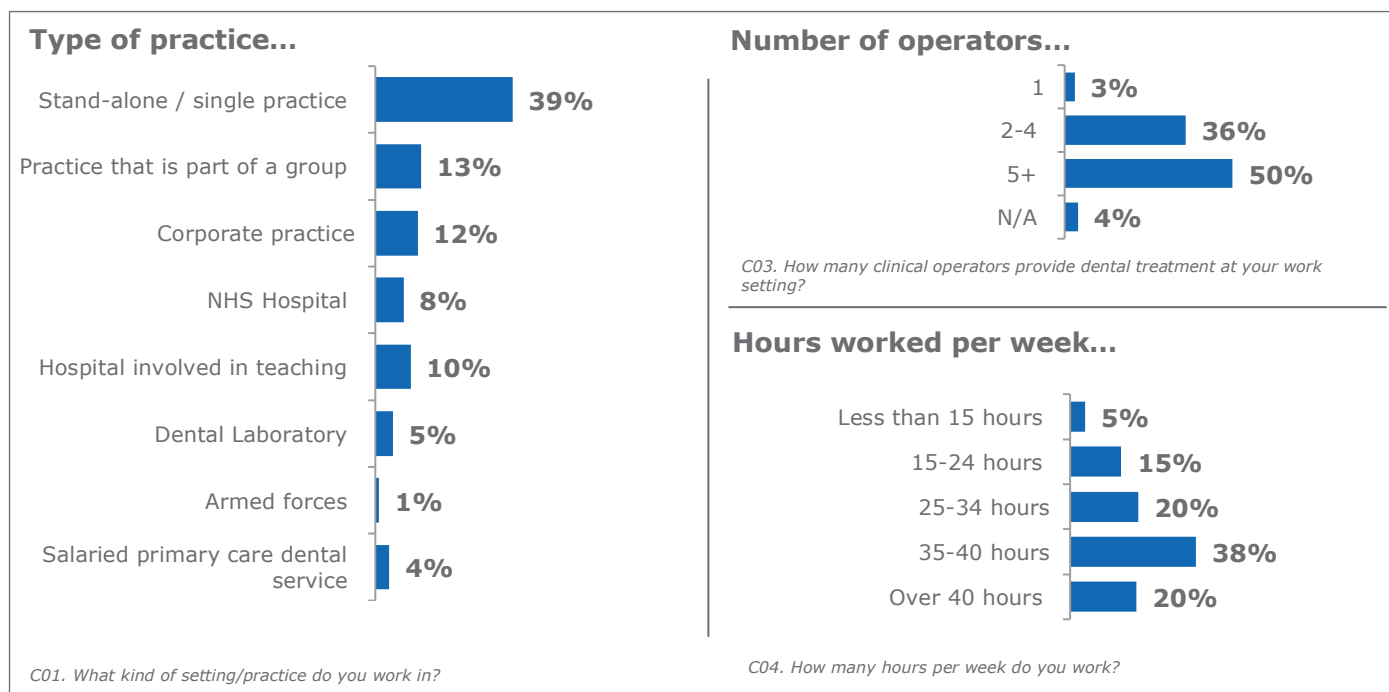


## Demographics (n=702):



Data may not sum to 100% due to rounding, multi-code questions, and also 'other' and 'prefer not to say' are not presented

## Practice setting (n=702):

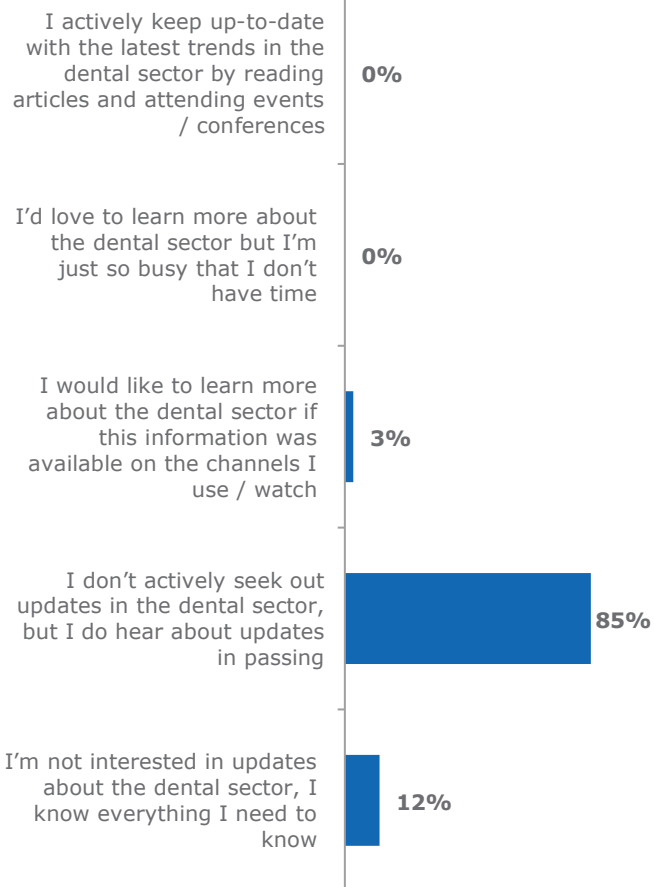


Data may not sum to 100% due to rounding, multi-code questions, and also 'other' and 'prefer not to say' are not presented



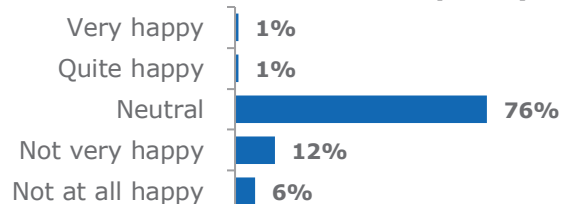
## Attitudes (n=702):

### Interest in the dental sector....



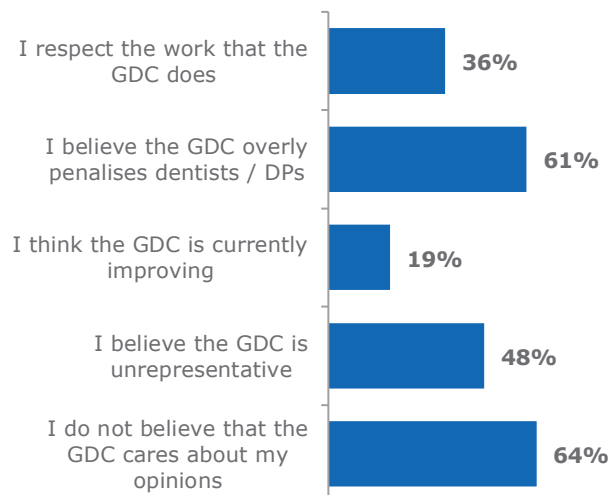
Q33. Which of the following statements best describes your views?

### Happiness with communication frequency



Q18. To what extent are you happy with the frequency of communications from the GDC?

### Opinions of the GDC (NET agree)



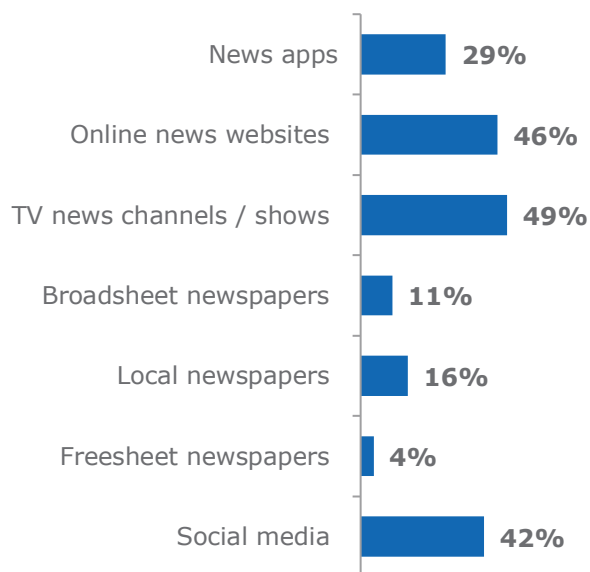
Q13. Which of the following statements best describes your views?

Data may not sum to 100% due to rounding, multi-code questions, and also 'other' and 'prefer not to say' are not presented



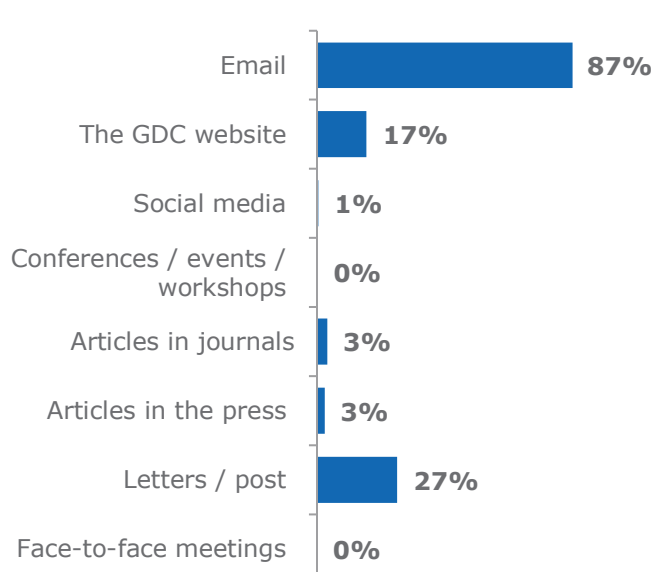
## Behaviours (n=702):

### General news updates preferences...



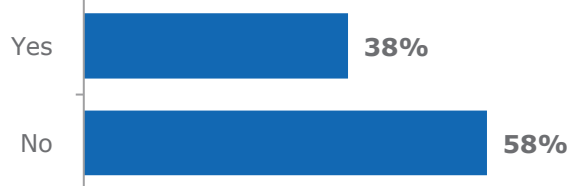
Q31. Which of the following do you regularly use for general news updates?

### Communication channels with the GDC...



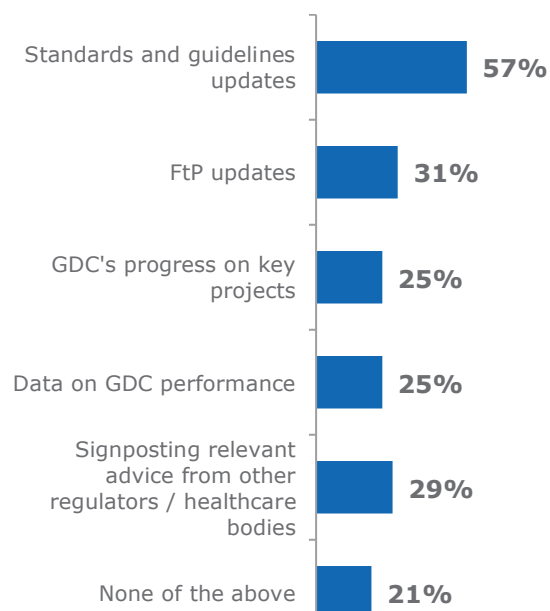
Q16. How does the GDC typically communicate with you?

### Initiated contact with the GDC...



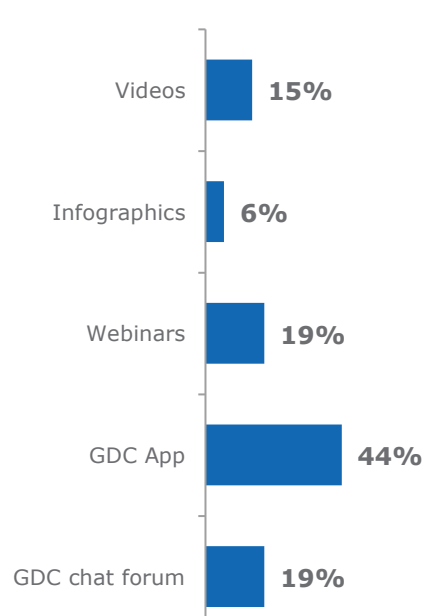
Q26. Have you ever initiated contact with the GDC?

### Future communications from the GDC



Q24. Would you like to receive any of the following from the GDC?

### Future channels from the GDC



Q25. Which of the following do you think the GDC should also consider using?

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# General Dental Council



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