

DENTISTRY UK MARKET REPORT

SIXTH EDITION

Will dentistry demand return to pre-pandemic levels?

The report shows a 'high street' dentistry market, valued by LaingBuisson at £8.3 billion in 2020/21, which shrunk nearly 10% in real terms (after taking account of CPI) since the previous year. Of this, private sector dentistry accounted for £4.6 billion, while NHS spend amounted to £3.7 billion.

This new edition of the *Dentistry UK* market report evaluates the significant impact of the Covid-19 pandemic on the fragmented market. During 2020, much routine treatment ground to a halt, and when combined with the restrictions on aerosol generating procedures, only very urgent and emergency treatments could take place.

Updated figures show that demand decreased perhaps less than might have been expected to a level of 56% in 2020. By October 2021, 47% of patients had returned to a dental practice after the nationwide lockdown ease. However, half had not done so yet, meaning that they had not seen a dental professional at all for 18 months or more.

LaingBuisson predicts the market to continue an upward growth by an average of 2-3% in nominal terms in the next three years. This will mainly come from more spending on private dentistry, though much depends on the strength of the UK economy, and spending on NHS dentistry is expected to fall in real terms.

Challenges for the dentistry market are still focused on recruitment and retention. Providers continue to report challenges in the recruitment of dentists and dental care professionals. Some providers have reported labour shortages, resulting in the undershooting of NHS contracted activity, and an increased reliance on locum dentists. The shortage is affecting all roles, not just dentists. This comes at a time when a new NHS dentistry contract model, which aims to improve prevention and focus on patient outcomes, continues to be tested after many years of planning.

A positive outcome from the latest analysis showed that consolidation strengthened the market with several equity investments and transactions. This includes the recently announced merger of Portman Healthcare and Dentex.

Who is the report for

- Dental practices and dental groups
- NHS commissioners
- Banks
- Private equity investors
- Management consultants
- Business advisors
- Insurers and insurance brokers
- Central government
- Think tanks
- Policy writers

What the report covers

- Market overview
 - 'High street'
 - NHS
 - Corporate
- Dental plans
- Politics and policy
- Regulation and representation
- NHS funding
- Dental provision
- Staff recruitment, training and retention
- Private dentistry
- Corporate dentistry
- Investment in UK dentistry

- Appendices
- Glossary
- Regulators
- Trade bodies
- Major provider profiles
- Financial appendix

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Reports



Private healthcare

Following healthy growth which bucked the economic trends of 2020/21, the private healthcare self-pay market continued its trajectory of market-beating growth throughout 2021/22.

Confidence that the market will continue to achieve double-digit growth in the next three years remains high.

This report also has a focus on the state of the market following Covid-19. There is clearly a direct correlation between lengthening NHS waiting lists and people's appetite to pay for their own treatment. No-one likes to be in unnecessary pain and the push factors may be enough to sustain continued growth in private healthcare self-pay.

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Digital

Containing new and rebased data, the latest edition of this LaingBuisson's report offers insight into the current state of the UK healthcare sector's digital transformation, and the potential benefits of scaling and penetrating existing proven technologies across the whole NHS.

While digital health spending as a percentage of the overall healthcare budget has increased since 2020, we argue; is it enough to encourage a full-scale adoption of digital technology and construct a solid foundation for the NHS to build upon?

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