

Dentistry - UK - June 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“With rising fixed costs in the industry, the last decade has seen a period of sustained consolidation through acquisition. Strategic investors and private equity see the market’s underlying growth drivers as an opportunity - offering scope to acquire, consolidate, improve efficiencies, and sell practices at greater multiples.”

– Lewis Cone, B2B Analyst

This report looks at the following areas:

- What are the key determinants driving the industry?
- How could the market be affected by Brexit?
- How has the provision of dental treatment and other services changed over recent times? Has it favoured private dental provision?
- How do patients currently rate dental services? Is there room for improvement?
- What does the future hold for dentistry in the UK?

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Dentistry - UK - June 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Executive Summary

Market size

Figure 1: UK expenditure on dental care, 2014-18 (£ billion)

Figure 2: UK expenditure on dental care, by segment, 2014-18 (£ billion)

Market trends

Increase in clawback levels highlight recruitment troubles

The number of patients seeking orthodontic treatment continues to rise

Market factors

Trade associations unite to ensure Brexit has as smooth an effect as possible on practice costs, recruitment and legislation

Ageing population likely to drive demand for dental care

Figure 3: UK population estimate and projection, 2018 and 2023, by age group (millions of people)

Consumer

Half of people have never visited a private dentist

Figure 4: Last dental appointment, by time of last appointment and service type, April 2018 (% of respondents)

Nearly seven-in-10 'self-fund' dental treatment

Dentists most commonly perform a general examination alongside a scale and polish during one visit

Location, cost and staff friendliness most important factors

Fear and cost of treatment are the main causes behind not visiting a dentist

Opinion of friends, family, and co-workers is important when finding a new dentist

Industry structure

Forecast

Slow but steady growth expected

Figure 5: UK dental care expenditure forecast, by segment, 2019-23 (£ billion at 2018 prices)

What we think

Key Insights

How is the future model of dental practice ownership likely to change?

How can the industry use digital platforms to its advantage and boost dental patient activity?

Introduction

Definitions

Methodology

Abbreviations

Market positioning

The role of the NHS

Dental practices

Regulators

General Dentist Council

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Dentistry - UK - June 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Care Quality Commission
 Regulation of Dental Services Programme Board
 Recent regulation
 Private Dentistry (Wales) Regulations 2017
 Market demand

UK Economy

Key points

Overview

Figure 6: Forecast GDP development 2017-22 (% annual growth)

Figure 7: UK GDP quarterly development, 2007-17 (% quarterly growth and GDP in £ billion)

Inflation

House prices

Figure 8: UK house price changes, 2007-18 (12 month % change)

Interest rates

Consumer spending

Manufacturing

Figure 9: UK manufacturing, 2014-18 (index, 2015 = 100)

Business investment

Figure 10: UK GFCF, 2007-17 (£ million, chained volume measures, seasonally adjusted)

Imports

Exports

Market Factors

Key points

Trade associations unite to ease Brexit's impact on practice costs, recruitment and legislation

Ageing population likely to drive demand for dental care

Figure 11: UK population estimate and projection, 2018 and 2023, by age group (millions of people)

Figure 12: UK population estimate and projection, 2018 and 2023, by age group (millions of people)

Inflationary pressures are affecting household real incomes which could reduce the number of dental visits

Figure 13: GDP per head at current market prices and real household disposable income per head, Q4 2013-Q4 2017 (£)

Figure 14: GDP per head at current market prices and real household disposable income per head, Q4 2013-Q4 2017 (£)

Decline in dentists' NHS activity recorded alongside a fall in the percentage of people treated...

Figure 15: Dentists with NHS activity in England, 2012/13-2016/17 (no. of dentists and % annual change)

Figure 16: Number of dentists with NHS activity in England, 2012/13-2016/17 (no. of dentists)

Figure 17: Dental patients seen in England under the NHS over the previous 24 months, at 30 June, 2013-17 (000s of patients)

Figure 18: Dental patients seen in England under the NHS in previous 24 months, at 30 June, 2013-17 (000s of patients)

...but this has not been helped by a number of dental practices not accepting new patients

Student intake target has been reduced from 2017/18, although vacancies for current dental positions remain unfilled

Figure 19: Target number of dental students and actual intakes in England, 2011/12-2016/17 (number of students)

Figure 20: Target number of dental students and actual intakes in England, 2010/11-2015/16 (number of students)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Dentistry - UK - June 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Market Size

Key points

Growth in dental care expenditure starting to slow

Figure 21: Total UK dental care expenditure, 2014-18 (£ billion)

Figure 22: UK expenditure on dental care, 2014-18 (£ billion)

NHS treatment costs rise by 5% for the second consecutive year in 2018

Figure 23: NHS dental charges in England, 2014-18 (£)

Figure 24: NHS dental charges in England, 2014-18 (£)

High number of children still not visiting a dentist could impact future growth...

...as well as regional disparities in dental standards

Market Segmentation

Key points

Segment overview

Figure 25: Total UK dental care expenditure, by segment, 2014-18 (£ billion)

Figure 26: UK expenditure on dental care, by segment, 2014-18 (£ billion)

Private treatments

Cosmetic dentistry growth slows

Figure 27: UK expenditure on private cosmetic dental care, 2014-18 (£ billion)

Figure 28: UK expenditure on private cosmetic dental care, 2014-18 (£ billion)

NHS dentistry

Figure 29: UK expenditure on NHS dental care, by payment segment, 2014-18 (£ million)

Figure 30: UK expenditure on NHS dental care, by payment segment, 2014-18 (£ million)

Courses of NHS treatment rise since 2016 due to growth in band one treatments

Figure 31: Number of courses of dental treatment under NHS, in England, 2012/13-2016/17 (000s)

Figure 32: Number of courses of dental treatment under NHS, in England, 2012/13-2016/17 (000s)

Dental insurance and new payment plans offer patients a route to receiving treatment

Market Trends

Key points

General decline in dental earnings

Figure 33: UK dental salaries, by job role and region, 2016 (£000)

Increase in clawback levels highlight recruitment troubles

Dental practice profits rise in 2017

The number of patients seeking orthodontic treatment continues to rise

The Consumer – Last Dental Appointment

Key points

Half of people have never visited a private dentist

Figure 34: Last dental appointment, by time of last appointment and service type, April 2018 (% of respondents)

Figure 35: Last dental appointment, by time of last appointment and service type, April 2018 (% of respondents)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Dentistry - UK - June 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Likelihood of most recent NHS visit rises with age, but declines with age for most recent private visit

Figure 36: Last NHS dental appointment, by time of last appointment and by age and gender, April 2018 (% of respondents)

Figure 37: Last NHS dental appointment, males, by time of last appointment and by age, April 2018 (% of respondents)

Figure 38: Last NHS dental appointment, females, by time of last appointment and by age, April 2018 (% of respondents)

Figure 39: Last private dental appointment, by time of last appointment and by age and gender, April 2018 (% of respondents)

Figure 40: Last private dental appointment, males, by time of last appointment and by age, April 2018 (% of respondents)

Figure 41: Last private dental appointment, females, by time of last appointment and by age, April 2018 (% of respondents)

The Consumer – Dental Payment

Key points

Nearly seven-in-10 'self-fund' dental treatment

Figure 42: Dental payment, April 2018 (% of respondents)

Figure 43: Dental payment, April 2018 (% of respondents)

Over-65s more than twice as likely to self-fund than 16 to 24 year-olds

Figure 44: Dental payment, by age and gender, April 2018 (% of respondents)

Self-funding of NHS treatment has risen over time...

Figure 45: Dental payment, by last NHS visit, April 2018 (% of respondents)

...whilst it has declined in the private industry

Figure 46: Dental payment, by last private visit, April 2018 (% of respondents)

The Consumer – Type of Treatment

Key points

Dentists most commonly perform a general examination alongside a scale and polish during one visit

Figure 47: NHS dental treatment, April 2018 (% of respondents)

Figure 48: Private dental treatment, April 2018 (% of respondents)

Figure 49: Dental treatment, by dentist type, April 2018 (% of respondents)

Rise in check-ups and scale and polish seen over the last year

Figure 50: NHS treatment, by time of last NHS visit, April 2018 (% of respondents)

Figure 51: Private treatment, by time of last private visit, April 2018 (% of respondents)

The Consumer – Choice Factors

Key points

Location, cost and staff friendliness most important factors

Figure 52: Dentistry choice factors, April 2018 (% of respondents)

Figure 53: Dentistry choice factors, April 2018 (% of respondents)

The Consumer – Reasons for Not Visiting a Dentist

Key points

Fear of the dentist and cost of treatment limit visits

Figure 54: Dentistry non-visit factors, April 2018 (% of respondents)

Figure 55: Dentistry non-visit factors, April 2018 (% of respondents)

The Consumer – Sources Used to Select a New Dentist

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Dentistry - UK - June 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key points

Opinion of friends, family, and co-workers would be used by half to find a new dentist

Figure 56: Sources of information, April 2018 (% of respondents)

Figure 57: Sources of information, April 2018 (% of respondents)

Industry Structure

Key points

Presence of corporate dentistry remains high despite recent practice closures and the need to develop a unique brand

Growing number of dental hygienists and therapists highlights their importance to the industry's operational structure

Figure 58: Analysis of GDC-registered dental professionals, April 2018 (number)

Market consolidation slows, but new means of ownership emerge

Market share

Figure 59: Estimated dental care providers' market share, 2017 (% of total market)

Figure 60: Estimated dental care providers' market share, 2017 (% of total market)

Recent M&A activity

Sector structure

Figure 61: Analysis of changes in the structure of the dental practice sector, 2013-17 (number of companies and practices)

Figure 62: Analysis of the employment structure of the dental practice sector, 2016-17 (total employees and number of companies)

Figure 63: Analysis of the financial structure of the dental practice sector, 2016 and 2017 (£000 and number of companies)

Figure 64: Analysis of the financial structure of the dental practice sector, 2017 (£000 and number of companies)

Company Profiles

BUPA Dental Services

Figure 65: Financial analysis of Bupa Dental Services, 2012-16 (£ million)

Figure 66: Financial analysis of Oasis Dental Care, 2012-16 (£ 000)

Figure 67: Financial analysis of Oasis Dental Care (Central), 2012-16 (£ 000)

Figure 68: Financial analysis of Oasis Dental Care (Southern), 2012-16 (£ 000)

Company strategy

Colosseum Dental Services (formerly known as Southern Dental)

Figure 69: Financial analysis of Colosseum Dental UK Ltd (formerly Southern Dental), 2013-17 (£ million)

Company strategy

DPAS

Figure 70: Financial analysis of DPAS, 2012-16 (£ 000)

Company strategy

Mydentist (formerly IDH Group)

Figure 71: Financial analysis of Turnstone Equityco 1, 2013-17 (£ million)

Subsidiary companies

Figure 72: Financial analysis of Whitecross Dental Care, 2013-17 (£ 000)

Figure 73: Financial analysis of Petrie Tucker and Partners, 2013-17 (£ million)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Dentistry - UK - June 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 74: Financial analysis of Orthoworld 2000, 2013-17 (£ million)

Company strategy

Practice Plan

Figure 75: Financial analysis of Practice Plan, 2012-16 (£ million)

Company strategy

Rodericks Dental Limited

Figure 76: Financial analysis of Rodericks, 2013-17 (£ million)

Company strategy

Simplyhealth Professionals (formerly Denplan)

Figure 77: Financial analysis of Simplyhealth Professionals (formerly Denplan), 2012-16 (£ million)

Company strategy

Western Provident Association

Figure 78: Financial analysis of Western Provident Association, 2012-16 (£ 000)

Company strategy

Figure 79: Profiled companies' turnover, 2012-16 (£ 000)

Forecast

Key points

Market size

Ongoing prototype testing of new NHS dental contract has highlighted growing recruitment issue

Slow but steady growth expected

Figure 80: UK expenditure on dental care forecast, 2019-23 (£ billion at 2018 prices)

Figure 81: UK dental care expenditure forecast, 2019-23 (£ billion at 2018 prices)

Lack of clarity over direction of Brexit continues to concern industry

Market segmentation

Private dental growth expected to decay as incomes stagnate

Figure 82: UK dental care expenditure forecast, by segment, 2019-23 (£ billion at 2018 prices)

Figure 83: UK dental care expenditure forecast, by segment, 2019-23 (£ billion at 2018 prices)

Both the youngest and oldest patients are likely to provide the greatest development opportunities going forward

The introduction of new technology and equipment will help improve patient outcomes and practice profitability...

...whilst digital platforms will help provide solutions to several dental care issues

Further Sources and Contacts

Trade associations

Association of Dental Administrators and Managers

The Association of Dental Anaesthetists

Association of Dental Groups

Association of Dental Implantology

British Academy of Cosmetic Dentistry

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Dentistry - UK - June 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

British Association of Dental Nurses
British Association of Dental Therapists
British Association of Prosthetists and Orthotists
British Dental Association
British Dental Industry Association
British Endodontic Society
British Orthodontic Society
British Society of Dental Hygiene & Therapy
British Society for Disability and Oral Health
British Society of Paediatric Dentistry
British Society for Restorative Dentistry
British Society for the Study of Prosthodontics
Trade magazines
British Dental Journal
Dental Health
Dental Insider
Dental Nursing
Dental Supplies
Dentistry
Primary Dental Journal
Private Dentistry
The Business of Dentistry
The Dentist
Trade exhibitions
British Academy of Cosmetic Dentistry Annual Conference
British Dental Conference & Dentistry Show 2019
BDIA Dental Showcase
Dental Technology Showcase 2019
Oral Health Conference and Exhibition

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com