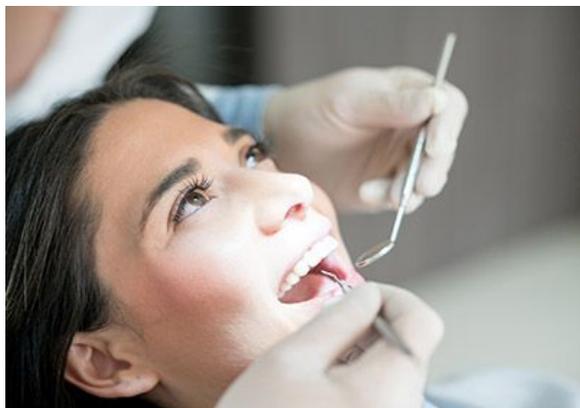


## Dentistry - UK - August 2019

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.



“Although growth is forecast to slow over the next five years, the private sector is anticipated to have greater growth opportunities than NHS dentistry since the NHS faces a considerable challenge in providing high quality healthcare amid rapid demographic changes and constrained public spending.”

– Lewis Cone, Senior B2B Analyst

This report looks at the following areas:

- NHS dentist accessibility problems adding to funding pressures that put future provision in doubt
- Threat of additional tax payments and stagnating salaries could stall market growth

Dental services have been available throughout the NHS since its creation in 1948. However, most dentists are not employed by the NHS but operate as independent contractors, choosing where to locate their premises and how much, if any, NHS treatment to provide.

NHS dental services are provided in primary care and community settings, and in hospitals for more specialised care. NHS England directly commissions all dental services for the NHS and there are over a million patient contacts with NHS dental services each week.

The total market for UK dental care is projected to reach a value of £10 billion by the end of 2019. The market has been boosted by consistent demand for private dental services as successive increases to NHS dentistry patient charges have closed the gap between the two types of service provision, while cosmetic procedures not available on the NHS are more in-demand.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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 - August 2019

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

### Overview

What you need to know  
Covered in this Report

### Executive Summary

Market size  
Stagnant growth in dental care expenditure continues  
Figure 1: Total UK dental care expenditure, 2015-19, (£ billion)

NHS accounts for largest segment but private dominates growth  
Figure 2: Total UK dental care expenditure, by provider, 2015-19, (£ billion)

Dental earnings continue to fall  
Figure 3: Average taxable income for all self-employed primary care dentists, England and Wales, 2012/13-2016/17, (£)

Slow market growth expected to continue – rising by just 6% to 2024  
Figure 4: Forecast UK expenditure on dental care, 2020-24, (£ billion at 2019 prices)

Companies and brands  
The consumer  
Almost half of people have never used a private healthcare service  
Seven-in-10 'self-fund' dental treatment  
What we think

### Issues and Insights

NHS dentist accessibility problems adding to funding pressures that put future provision in doubt  
The facts  
The implications  
Threat of additional tax payments and stagnating salaries could stall market growth  
The facts  
The implications

### The Market – What You Need to Know

Stagnant growth in dental care expenditure continues  
Segment overview  
Slow market growth expected to continue – rising by just 6% to 2024

### Market Size

Stagnant growth in dental care expenditure continues  
Figure 5: Total UK dental care expenditure, 2015-19, (£ billion)

NHS treatment costs rise by 5% for the third consecutive year in 2019  
Figure 6: NHS dental charges in England, per band, 2015-19, (£)

Over half of young children did not visit a dentist in 2018...  
...whilst regional inequalities remain

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Dentistry - UK - August 2019

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 Segmentation

### Segment overview

Figure 7: Total UK dental care expenditure, by provider, 2015-19, (£ billion)

### Private treatments

Cosmetic dentistry expenditure has risen by a quarter since 2015

Figure 8: UK expenditure on private cosmetic dental care, 2015-19, (£ billion)

### NHS dentistry

Figure 9: UK expenditure on NHS dental care, by payment segment, 2015-19, (£ million)

Courses of NHS treatment decline in each band in 2018

Figure 10: Number of courses of dental treatment under the NHS in England, 2013/14-2017/18, (000s)

## Market Forecast

Planned introduction of new NHS dental contract next year has not eased uncertainty and tension in the profession

Growth expected to remain subdued – rising by just 6% to 2024

Figure 11: Forecast UK expenditure on dental care, 2020-24, (£ billion at 2019 prices)

Private cosmetic growth expected to be industry's crowning glory, whilst the NHS will continue to stagnate

Figure 12: Forecast UK dental care expenditure, by segment, 2020-24, (£ billion at 2019 prices)

Digital technology and equipment helping reduce time pressures on dentists and improve patient outcomes

## The Impact of the Economy

Annual GDP growth falls to six-year low in 2018

Figure 13: Annual GDP growth rate, 2014-18, (%)

Bank rate remains at 0.75%

Figure 14: Bank rate, 2008-18, by date of adjustment, (%)

Household real incomes are on the rise but continued NHS charge rise offsetting potential impact on dental visits

Figure 15: GDP per head at current market prices and real household disposable income per head, Q1 2015-Q1 2019, (£)

## Market Trends

Dental earnings continue to fall

Figure 16: Average taxable income for all self-employed primary care dentists, England and Wales, 2012/13-2016/17, (£)

Figure 17: Associate rates per UDA, by region, (£)

Dental practice profits fall in 2018 after rising in 2017...

...although practice sales remain healthy

London and the Home Counties

South & South West Wales

Midlands

North

Scotland

## Market Drivers

Although Brexit is still not resolved, there has been an impact on recruitment and costs

Ageing population to drive dental treatment demand

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Dentistry - UK - August 2019

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 18: UK population estimate and projection, 2019 and 2024, by age group, (millions of people)

Both NHS dentist activity and the number of patients increased in 2018

Figure 19: Dentists with NHS activity in England, 2013/14-2017/18, (no. of dentists and % annual change)

Figure 20: Dental patients seen in England under the NHS over the previous 24 months, at 30 June, 2014-18, (000s of patients)

Student intake boosted by additional government funding, but large number of vacancies remain for current dental positions

Figure 21: Target number of dental students and actual intakes in England, 2013/14-2017/18, (number of students)

Lending to the industry is rising despite uncertainty

## Companies and Brands – What You Need to Know

Investor demand for practices remains strong, but average price growth diminishes

New co-ownership model continues to thrive and provide alternative

## Industry Structure

Investor demand for practices remains strong, although average price growth diminishes

ADG and IHPN enter partnership

Market share

Figure 22: Number of UK dental practices, 2018, by corporate operator and ownership, (number)

Recent M&A activity

Sector structure

Figure 23: Analysis of changes in the structure of the dental practice sector, 2014-2018, (number of companies and practices)

Figure 24: Analysis of the employment structure of the dental practice sector, 2017-2018, (total employees and number of companies)

Figure 25: Analysis of the financial structure of the dental practice sector, 2017 and 2018, (£000 and number of companies)

## Competitive Strategies

New co-ownership model continues to thrive and provide alternative

Mydentist partners with Philips Sonicare and Superdrug to launch dental health campaign

## Company Profiles

BUPA Dental Care

Figure 26: Financial analysis of Bupa Dental Care, 2013-2017, (£ million)

Colosseum Dental Services (formerly known as Southern Dental)

Figure 27: Financial analysis of Colosseum Dental Services, 2014-2017\*, (£ million)

DPAS

Figure 28: Financial analysis of DPAS, 2013-2017, (£000)

Mydentist (formerly IDH Group)

Figure 29: Financial analysis of Turnstone Equityco 1, 2014-2018, (£ million)

Figure 30: Financial analysis of Whitecross Dental Care, 2014-2018, (£ 000)

Figure 31: Financial analysis of Petrie Tucker and Partners, 2014-2018, (£ million)

Figure 32: Financial analysis of Orthoworld 2000, 2014-2018, (£ million)

Practice Plan

Figure 33: Financial analysis of Practice Plan, 2013-2017, (£ million)

Rodericks Dental Limited

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Dentistry - UK - August 2019

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 34: Financial analysis of Rodericks, 2014-2018, (£ million)

Simplyhealth Professionals (formerly Denplan)

Figure 35: Financial analysis of Simplyhealth Professionals, 2014-2018, (£ million)

## The Consumer – What You Need to Know

Almost half of people have never used a private healthcare service

Seven-in-10 'self-fund' dental treatment

People are most satisfied with appointment duration

## Last Dental Appointment

Almost half of people have never visited a private dentist

Figure 36: Last dental appointment, by time of last appointment and service type, April 2019, (% of respondents)

Likelihood of most recent NHS visit rises with age, but peaks at between 25 and 44 years old for most recent private visit

Figure 37: Last NHS dental appointment, by time of last appointment and by age and gender, April 2019, (% of respondents)

Figure 38: Last private dental appointment, by time of last appointment and by age and gender, April 2019, (% of respondents)

## Dental Payment

Seven-in-10 'self-fund' dental treatment

Figure 39: Dental payment, April 2019, (% of respondents)

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

Figure 40: Dental payment, by age and gender, April 2019, (% of respondents)

Self-funding of NHS treatment has risen over time with a decline in the proportion of free treatment...

Figure 41: Dental payment, by time of last NHS visit, April 2019, (% of respondents)

... whilst self-funding has declined in the private industry

Figure 42: Dental payment, by time of last private visit, April 2019, (% of respondents)

## Type of Treatment

Dental examination and check-up most common reason for treatment

Figure 43: Dental treatment, April 2019, (% of respondents)

Rise in check-ups and x-rays over the last year

Figure 44: Dental treatment, by time of last NHS visit, April 2019, (% of respondents)

Figure 45: Dental treatment, by time of last private visit, April 2019, (% of respondents)

## Service Satisfaction

People are most satisfied with appointment duration

Figure 46: Dental service satisfaction, April 2019, (% of respondents)

## Barriers to Dentist Visit

Affordability still preventing dental visits

Figure 47: Barriers to visiting a dentist, April 2019, (% of respondents)

## Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Methodology

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Dentistry - UK - August 2019

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.

### Further Sources and Contacts

Trade associations

Trade magazines

Trade events

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)