

Dentistry - UK - 2022

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This report looks at the following areas:

- The impact of COVID-19 on dentistry and how providers and patients have reacted to current market conditions
- How the dentistry market is adapting to 'living with COVID-19'
- The value of individual market segments in 2022 and beyond
- Consumer attitude and behaviours towards dentistry

As with many other sectors of healthcare, dentistry often finds itself overlooked as a profession when considered against many other specialties. However, the impact of dental disease is often much deeper and widespread than is typically anticipated. Issues with accessibility and cost have troubled the industry for many years and the pandemic only exacerbated these problems – resulting in a stronger and more prominent surge of media coverage.

Dental services have been severely disrupted by the pandemic and the demand for NHS dentistry is currently outweighing the supply. Many people have contacted local watchdogs and their MPs to report issues with getting dental appointments, even when they require urgent care.

Private dental firms are not required to adhere to the same rules as NHS clinics in terms of capacity and they usually treat fewer patients, which means that waiting times are significantly shorter.

Despite these struggles, dental market revenue recovered more quickly than was first feared after the first COVID-19 nationwide lockdown in March 2020. Many dental practices took advantage of the government support packages although self-employed associates, particularly those in the private sector, did not qualify for the various support schemes.

Prior to the economic shutdown due to the COVID-19 pandemic, the market was on course to grow beyond the £10 billion value it recorded in 2019. The industry had been boosted by consistent demand for private dental services as



“With NHS dental contract reform likely to be ongoing for quite some time yet and additional government funding remaining inadequate, the private dental sector will continue to benefit from its counterparts’ situation. However, the longevity of inflationary pressures may dampen market growth.”

- Lewis Cone, Senior B2B Analyst

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successive increases to NHS dentistry patient charges closed the gap between the two types of service provision; cosmetic procedures not available on the NHS were also experiencing increasing demand.

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