

NHS dentistry is falling behind in an overall growing dental market

Experts have warned that NHS dentistry is narrowing with fewer new dentists joining the profession while private dentistry continues to thrive.

The warning came in the fifth edition of healthcare business market analysts LaingBuisson's *Dentistry UK Market Report*¹ published on 29 January 2019, which said that there was a 22% fall in new dentist registrations in the UK over two years and a significant drop in new registrations from other origins such as the European Union (EU).

The new report showed there was a steady 'High Street' dentistry market, valued at £7.1 billion in 2017–18 – a 0.2% growth in real terms (after taking account of the Consumer Price Index) – and of this, private sector dentistry accounted for £3.6 billion, while NHS spend amounted to £3.5 billion.

The report authors warned that the number of adults seen for NHS dentistry services declined for the first time in recent years, with a significant fall in NHS (UDA) activity and total UDAs completed in England not meeting contracted activity because of labour shortages in some areas.

Significantly, there has been a reduction in the number of NHS exempt patients due to a shift in welfare benefits and also a tighter monitoring of exemptions. In addition, fewer higher value treatments were being carried out through the NHS.

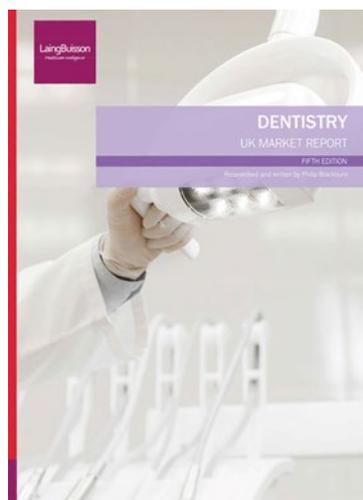
The report acknowledged serious recruitment difficulties in some parts of the country where NHS demand was high and said insufficient dentist hours had led to shortfalls in contracted NHS work and patients seen.

The acute recruitment problems in some UK regions were in places with high demand for NHS services and low demand for private dentistry, because dentist associates were attracted to areas where private demand was strong with scope for career development and better earnings.

Recruitment had not been helped by the fact that there were a fifth less new dentist

registrations in the UK between 2015 and 2017. Those registered with a UK qualification fell by 21.6% over those two years.

This was worsened by the fact that there was a fall in new dentist registrations coming from the EU, which fell from 970 in 2011 – some 52.7% of all new registrations in the UK – to a low of 409 in 2017 – some 23.4% of total new UK registrations. The acute falls in 2016 and 2017 may be due to the impact of Brexit, the authors speculated.



The picture was more positive in the private market as the report says private dentistry has been a driver of growth for a number of years, underpinned by the popularity of hygiene services, cosmetic dentistry and facial aesthetics, and specialist treatments.

There has also been a rise in the number of NHS patients paying for private treatment options within their dentistry care plan. Conversely, in 2017–18 there was a decline of 1.2% in spending on NHS dentistry.

LaingBuisson predicted that the market would continue to grow by an average of 2% to 2.5% in nominal terms in the next three years, mostly thanks to more spending on private dentistry, although a lot depended on the strength of the UK economy.

Corporate dentistry supply, in terms of practices operated by corporate dental

groups, was estimated to have grown by 20% between 2014 and 2018, now accounting for over 21.3% of the dental practice population compared to approximately 17% four years earlier.

Report author Philip Blackburn, said: 'UK dentistry has long-term drivers of demand: regular hygiene for prevention; desire for cosmetic dentistry and facial aesthetics to improve appearance; and progressive specialist treatment services which can offer a wide range of advanced dental procedures. Private dentistry has grown well enough in recent times under a stable economic environment, and many dental providers seek opportunities for continued growth.'

'However, future economic wellbeing, a key driver for the private market, is currently vulnerable. Modest UK growth is projected for several years, though Brexit holds a wild card on the economy and EU labour supply. Also difficulties in the recruitment and retention of dentists and other dental professionals poses a risk for dentistry market growth in general.'

'Investment interest in UK dentistry has been healthy and continues to be, as investors are optimistic about underlying demand conditions and scope for market growth in the long-term. This has been highlighted by continued growth in corporate dentistry, which now accounts for over a quarter of UK dentistry market value.'

However, NHS dentistry was 'falling behind', he added, saying: 'Policymakers face a clear challenge to ensure demand for NHS dentistry services is being met across the UK.'

'Contract volume shortfalls in England continue to keep a lid on higher activity, and many dental employers face significant recruitment and retention challenges for NHS work in certain areas, which are compounded by Brexit concerns.' ■

References

1. LaingBuisson. Dentistry UK Market Report. 2019. Available at <https://www.laingbuisson.com/shop/dentistry/> (accessed February 2019).