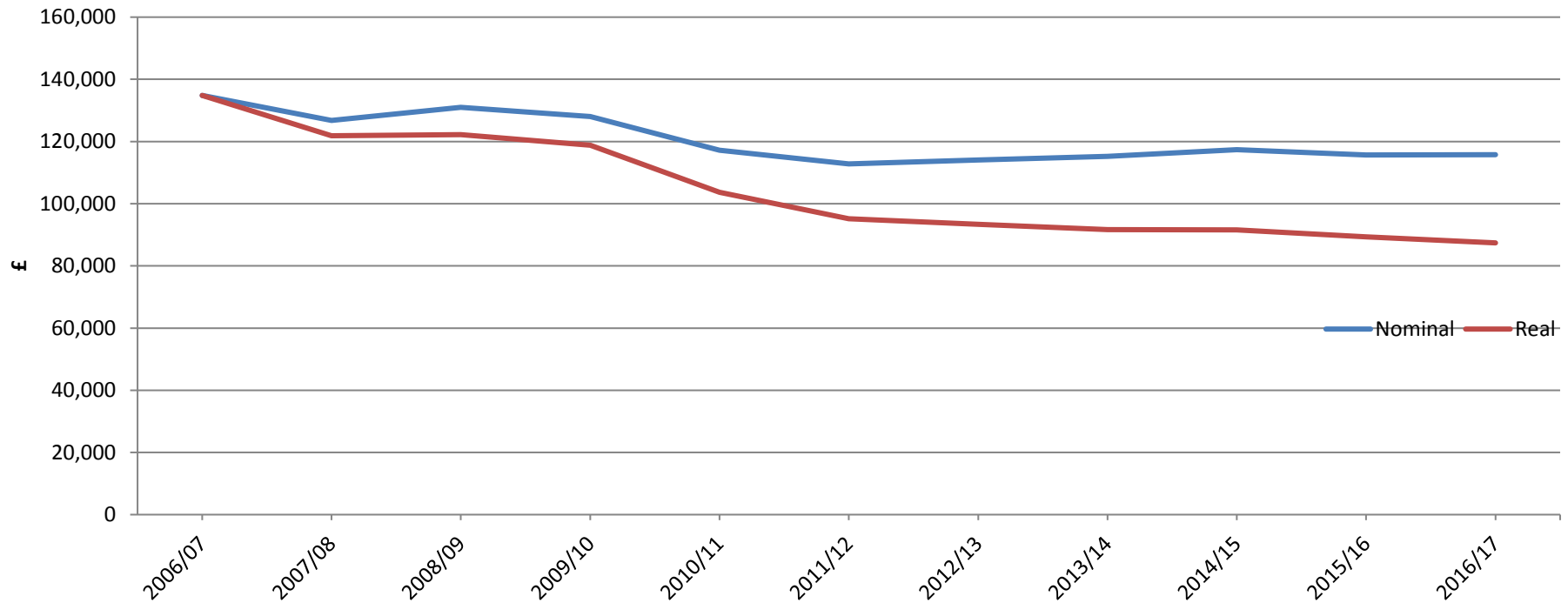


**The Dental Market – Where’s it been and where’s it heading**  
**Stephen Tidman’s presentation to LDC Conference on 7 June 2019**

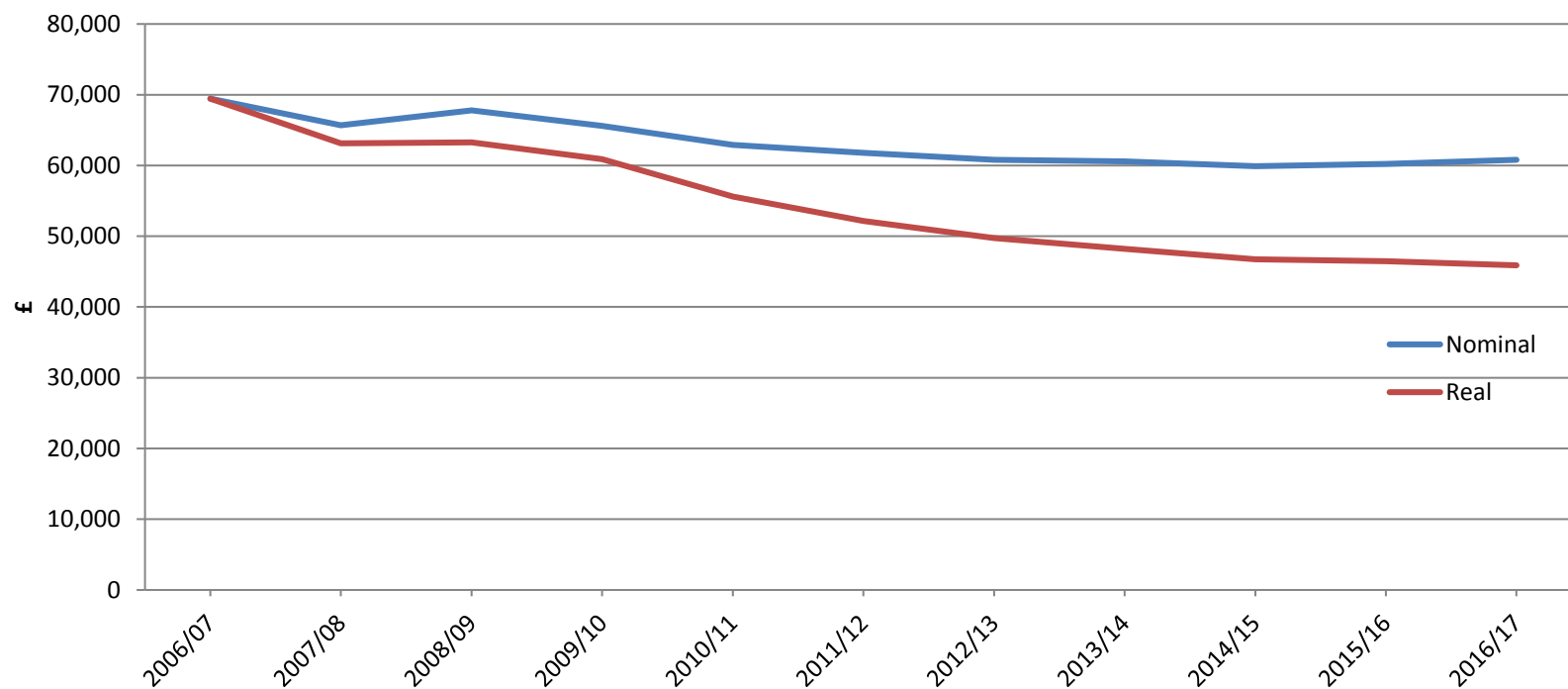
## Taxable Income/Net Profit of GDS/PDS Owners in England & Wales



	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
Nominal	134,827	126,807	131,000	128,000	117,200	112,800	114,100	115,200	117,400	115,700	115,800
Real	134,827	121,813	122,202	118,849	103,635	95,190	93,372	91,647	91,576	89,344	87,396

Source: Nominal values NHS Digital, real values deflated by RPI.

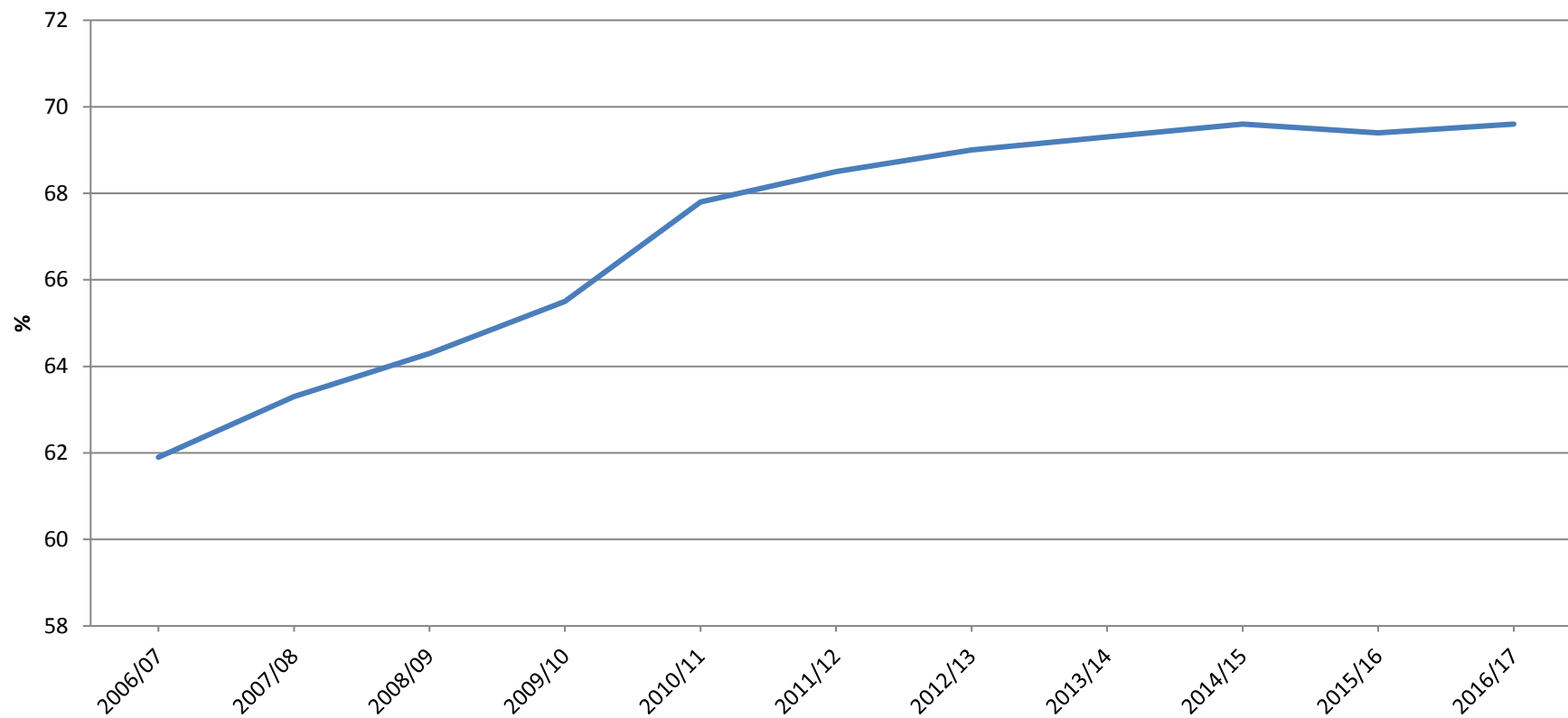
## Taxable Income/Net Profit of GDS/PDS Associates in England & Wales



	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
Nominal	69,442	65,697	67,800	65,600	62,900	61,800	60,800	60,600	59,900	60,200	60,800
Real	69,442	63,110	63,246	60,910	55,615	52,152	49,755	48,210	46,724	46,487	45,887

Source: Nominal values NHS Digital, real values deflated by RPI.

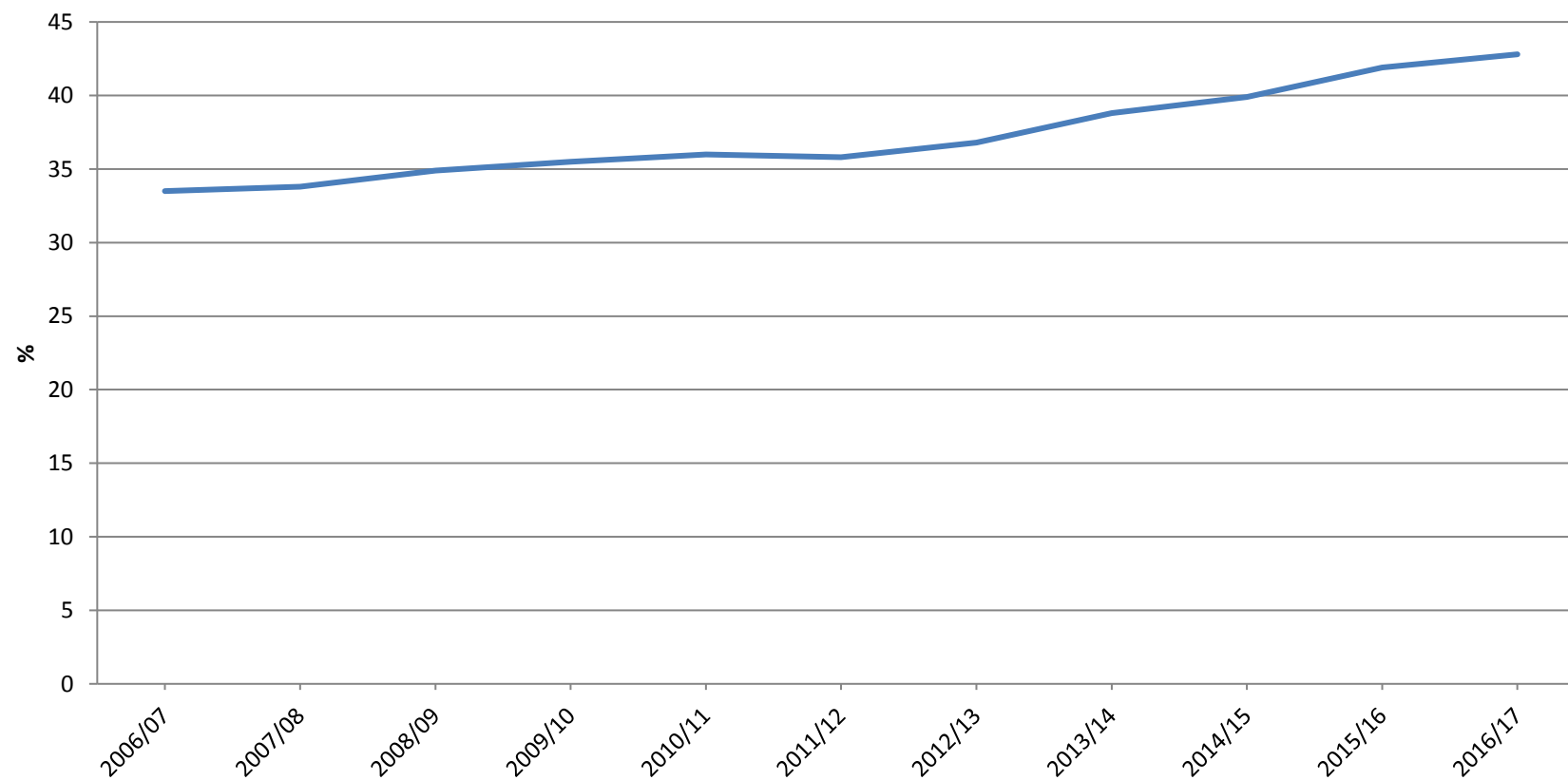
## Expense Ratio for GDS/PDS Owners in England & Wales



2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
61.9	63.3	64.3	65.5	67.8	68.5	69.0	69.3	69.6	69.4	69.6

Source: NHS Digital

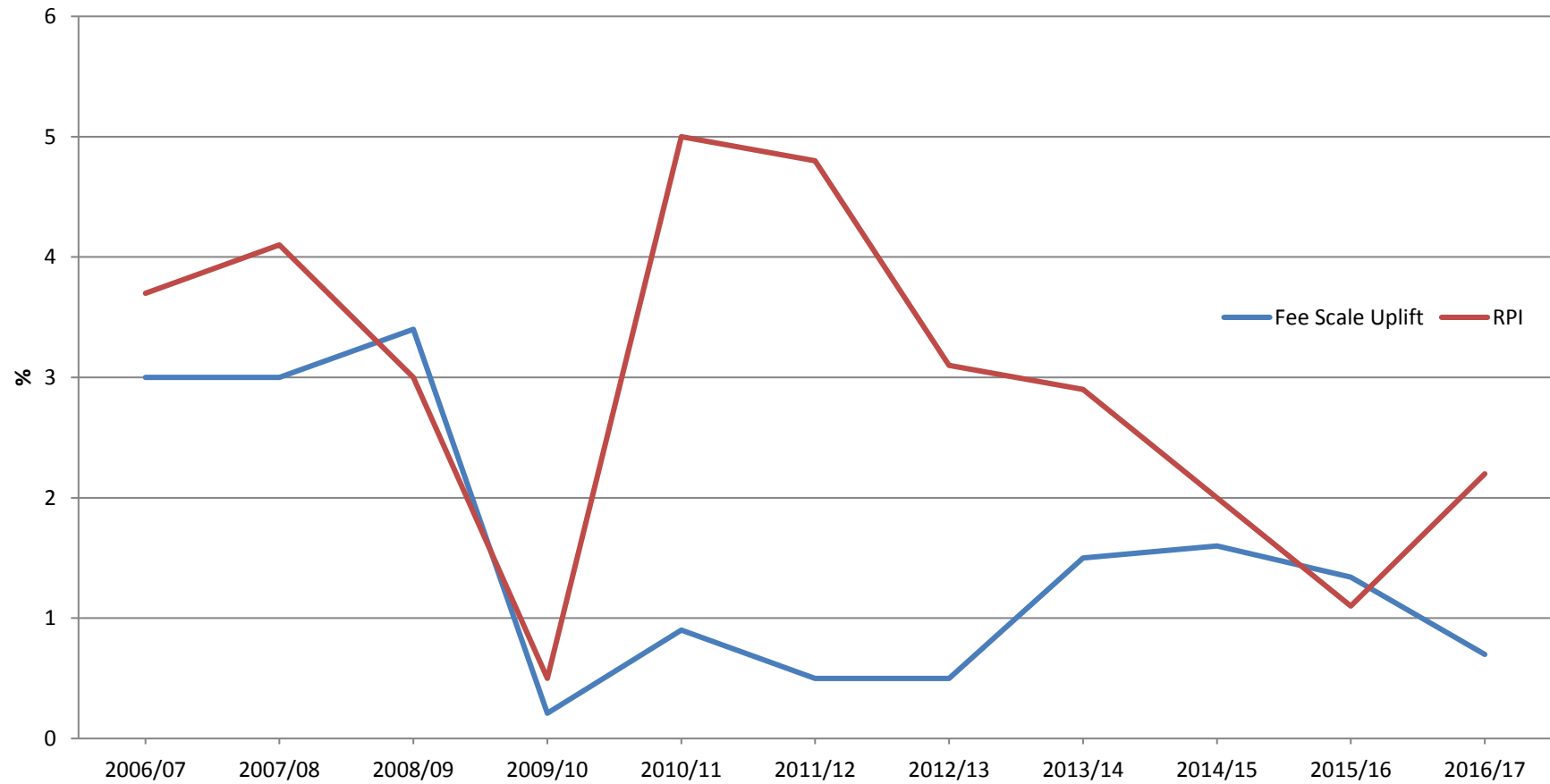
## Expense Ratio for GDS/PDS Associates in England & Wales



2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
33.5	33.8	34.9	35.5	36.0	35.8	36.8	38.8	39.9	41.9	42.8

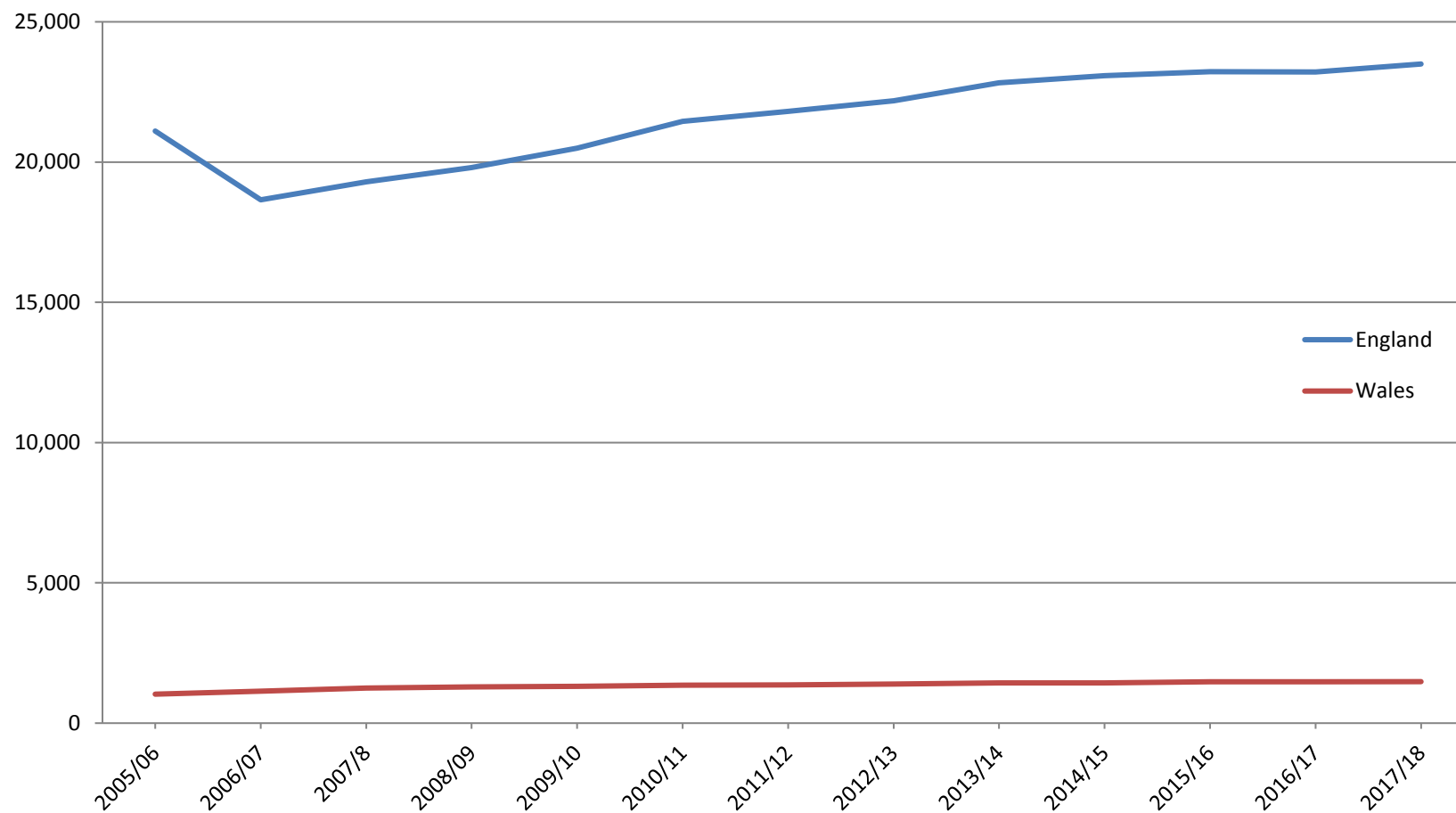
Source: NHS Digital

## In a Nutshell



	<b>Uplift in Fee Scale (England) and RPI</b>										
	<b>2006/07</b>	<b>2007/08</b>	<b>2008/09</b>	<b>2009/10</b>	<b>2010/11</b>	<b>2011/12</b>	<b>2012/13</b>	<b>2013/14</b>	<b>2014/15</b>	<b>2015/16</b>	<b>2016/17</b>
Fee Scale Uplift	3.0	3.0	3.4	0.21	0.9	0.5	0.5	1.5	1.76	1.34	0.7
RPI	3.7	4.1	3.0	0.50	5.0	4.8	3.1	2.9	2.00	1.10	2.2

## Number of GPs in GDS/PDS in England & Wales

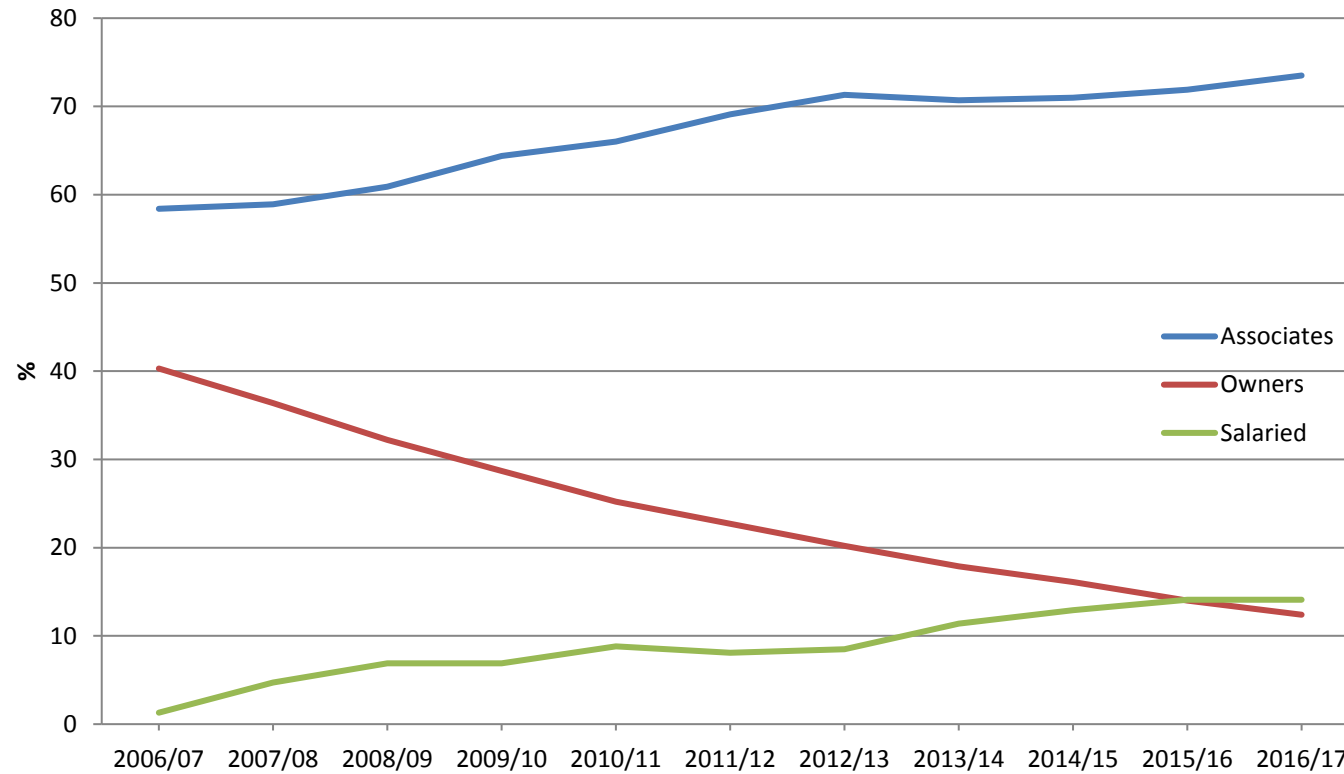


	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/19
England <sup>1</sup>	21,111	18,655	19,299	19,805	20,501	21,448	21,811	22,183	22,824	23,082	23,220	23,213	23,496
Wales	1,033	1,141	1,247	1,293	1,310	1,349	1,360	1,392	1,438	1,439	1,470	1,475	1,479

<sup>1</sup> Excludes Trust Dental Service (TDS) dentists from 2006/07.

Source: NHS Digital and Welsh Government Services and Information.

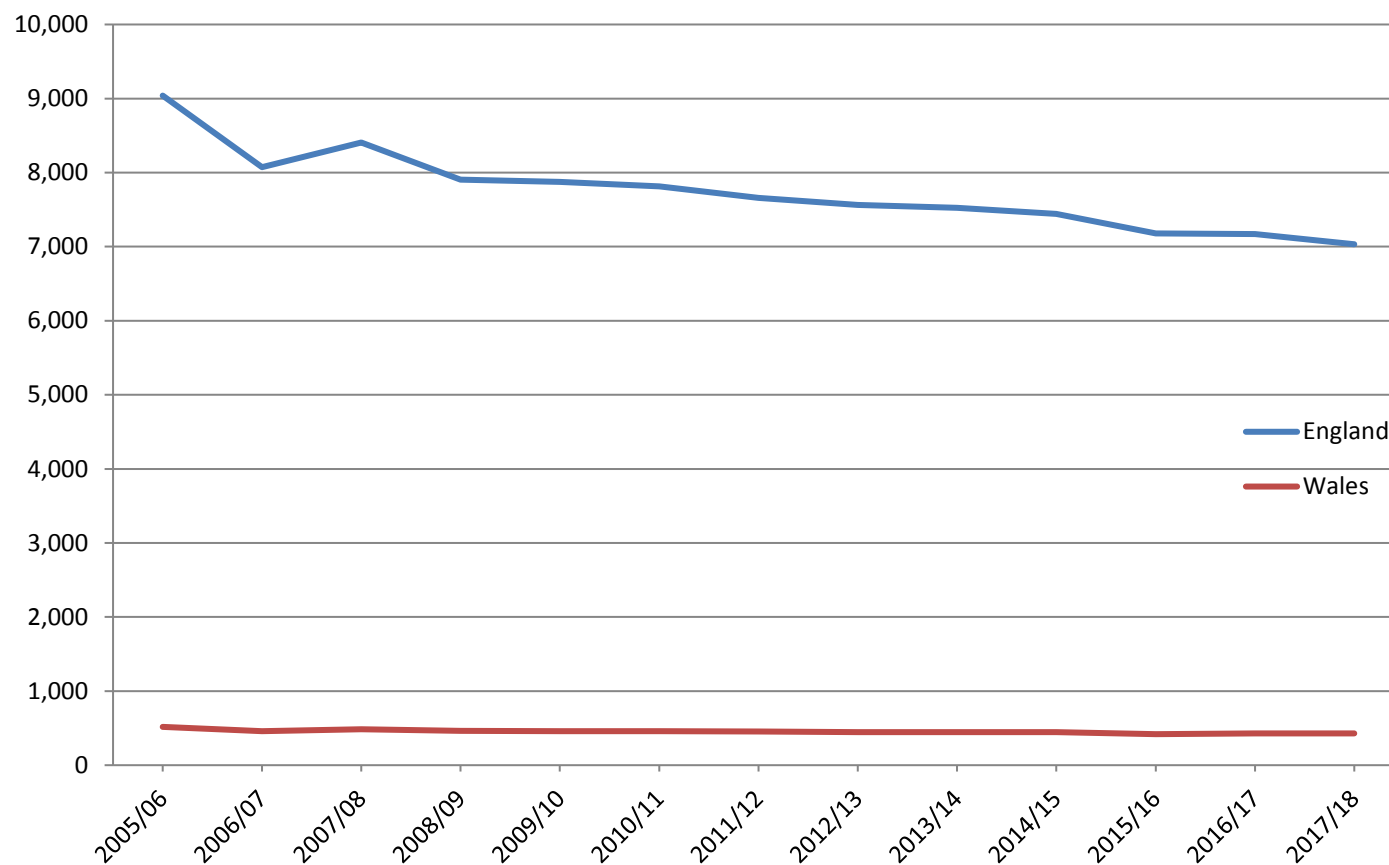
## Percentage of GDS/PDS Associates, Owners and Salaried GDPs in England & Wales



	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
Associates	58.4	58.9	60.9	64.4	66.0	69.1	71.3	70.7	71.0	71.9	73.5
Owners	40.3	36.4	32.2	28.7	25.2	22.7	20.2	17.9	16.1	14.0	12.4
Salaried	1.3	4.7	6.9	6.9	8.8	8.1	8.5	11.4	12.9	14.1	14.1

Source: Derived from NHS Digital Data.

## Number of GDS/PDS Practices in England & Wales

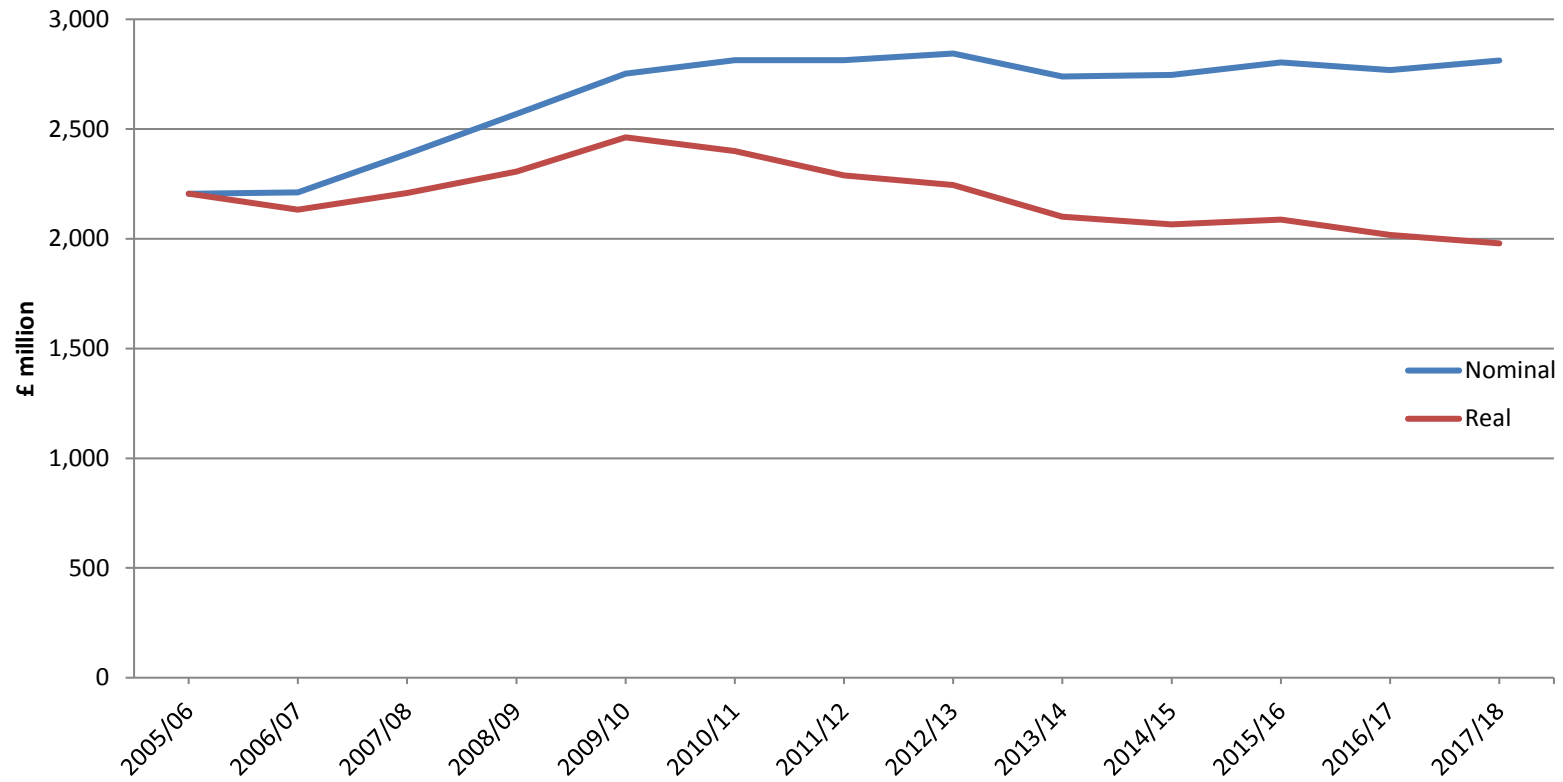


	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/19
England	9,040	8,072	8,406	7,904	7,875	7,813	7,657	7,563	7,523	7,442	7,179	7,172	7,033
Wales	517	459	484	462	461	461	456	447	447	448	419	428	428 <sup>1</sup>

Includes TDS practices from 2006/07. <sup>1</sup>DNA assumed constant  
 Source: NHS Digital.



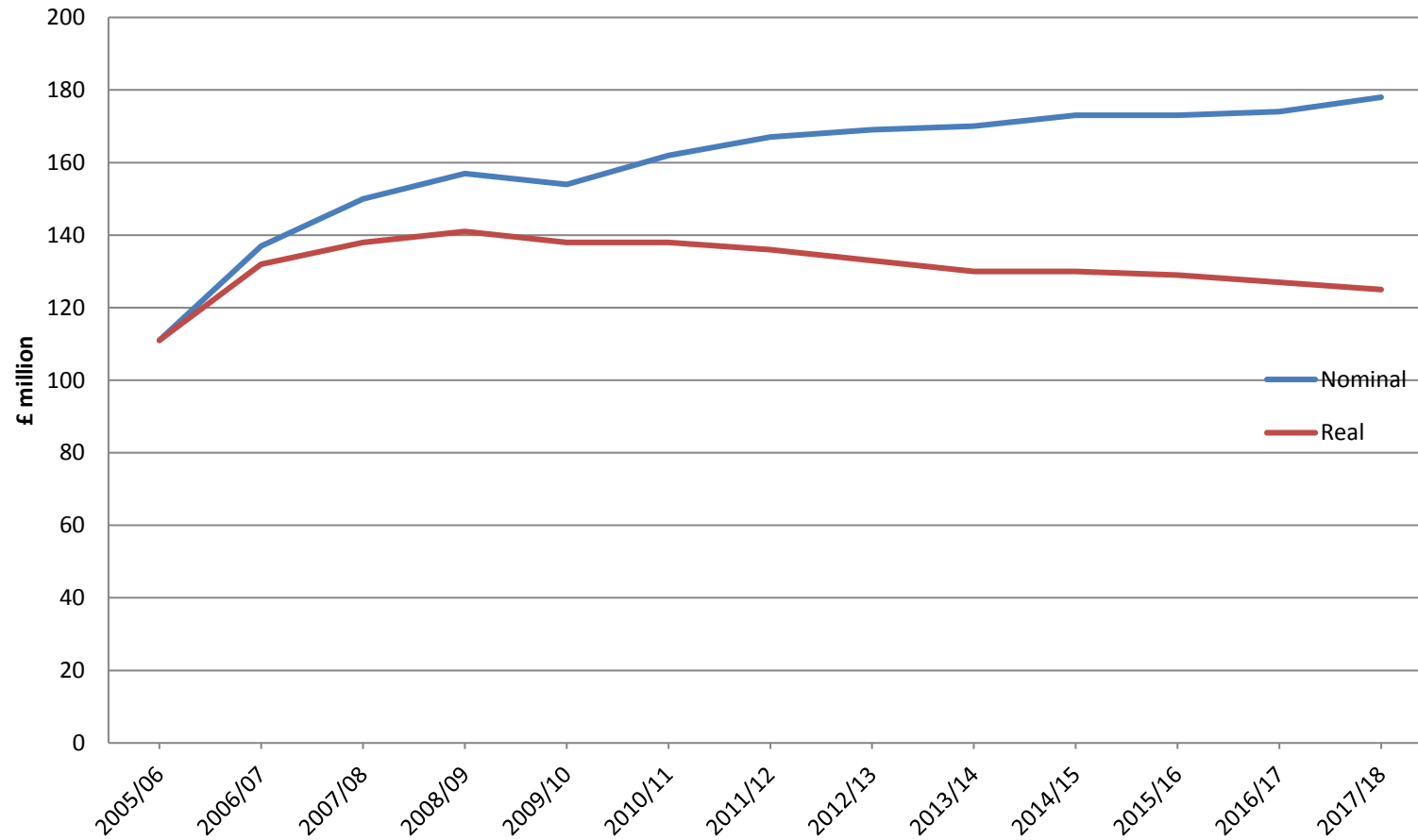
## GDS/PDS Gross Spend in England



	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Nominal	2,205	2,212	2,386	2,568	2,752	2,814	2,813	2,844	2,740	2,746	2,804	2,768	2,812
Real	2,205	2,133	2,209	2,306	2,462	2,399	2,289	2,245	2,101	2,066	2,088	2,018	1,979

Includes patient charge revenue (PCR) Source: Nominal values  
Department of Health & Social Care real values deflated by RPI.

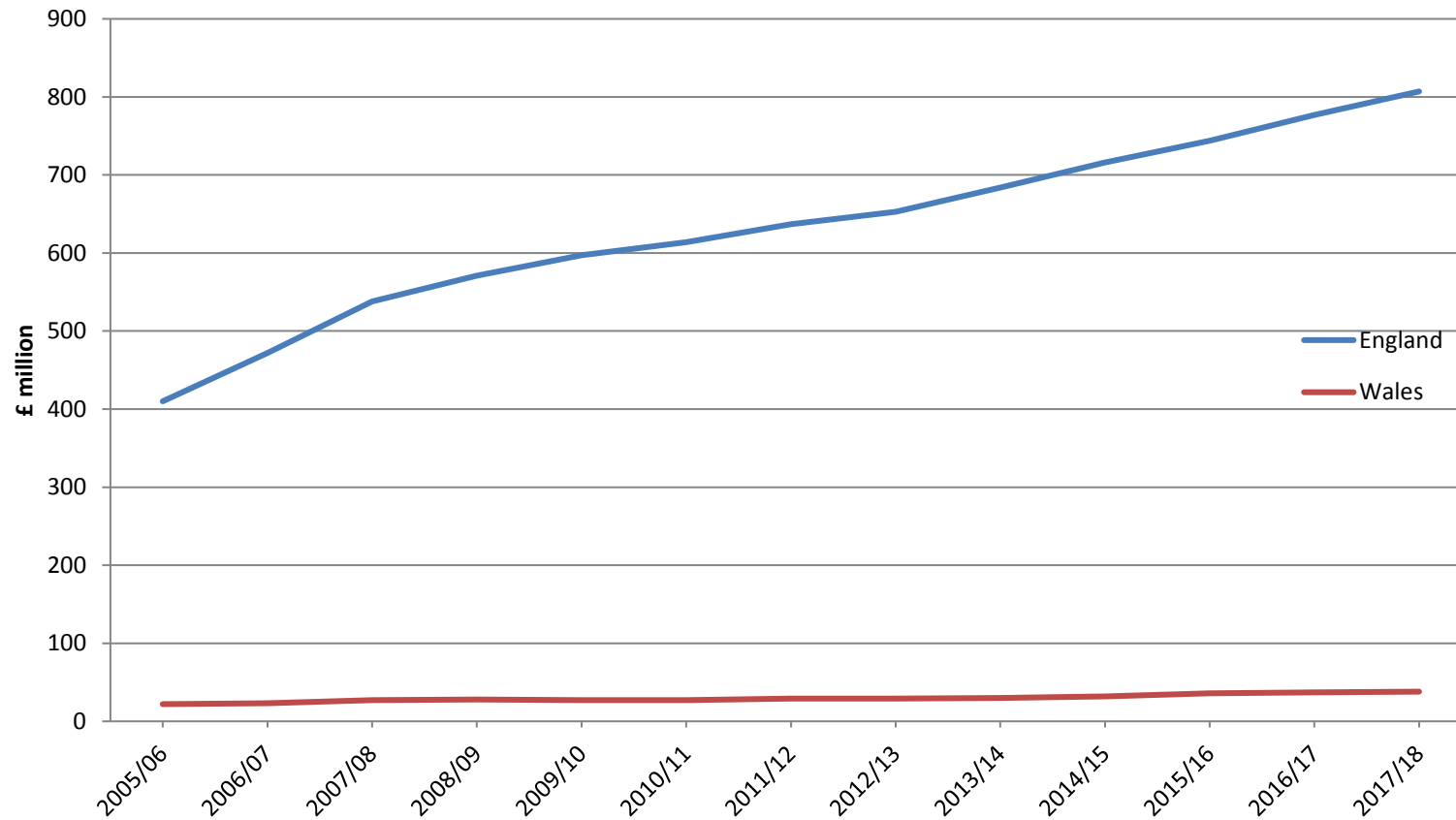
## GDS/PDS Gross Spend in Wales



	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Nominal	111	137	150	157	154	162	167	169	170	173	173	174	178
Real	111	132	138	141	138	138	136	133	130	130	129	127	125

Source: Nominal values Welsh Government real values deflated by RPI.

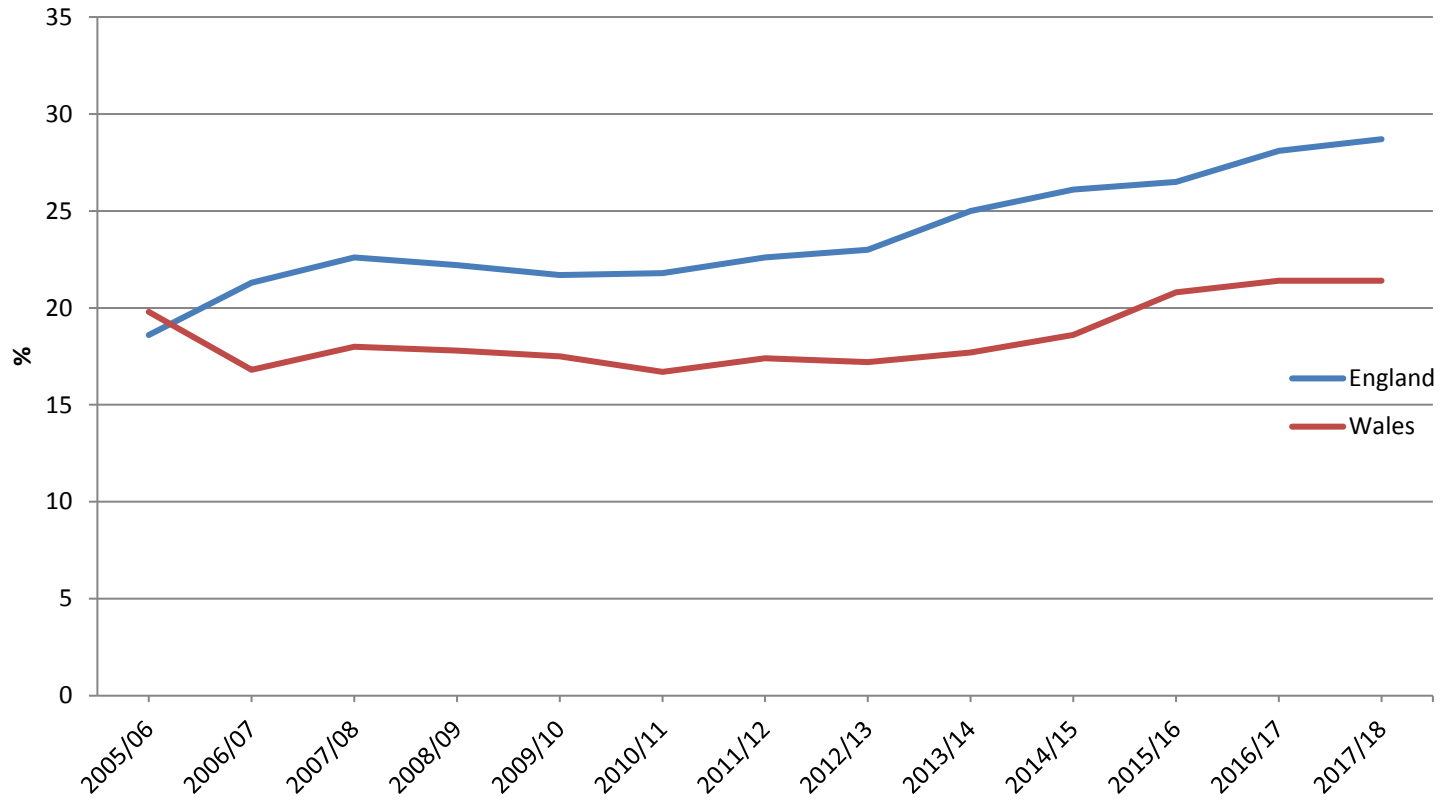
## Patient Charge Revenue (PCR) in England & Wales



	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
England	410	472	538	571	597	614	637	653	684	716	744	777	807
Wales	22	23	27	28	27	27	29	29	30	32	36	37	38

Source: Department of Health & Social Care and Welsh Government.

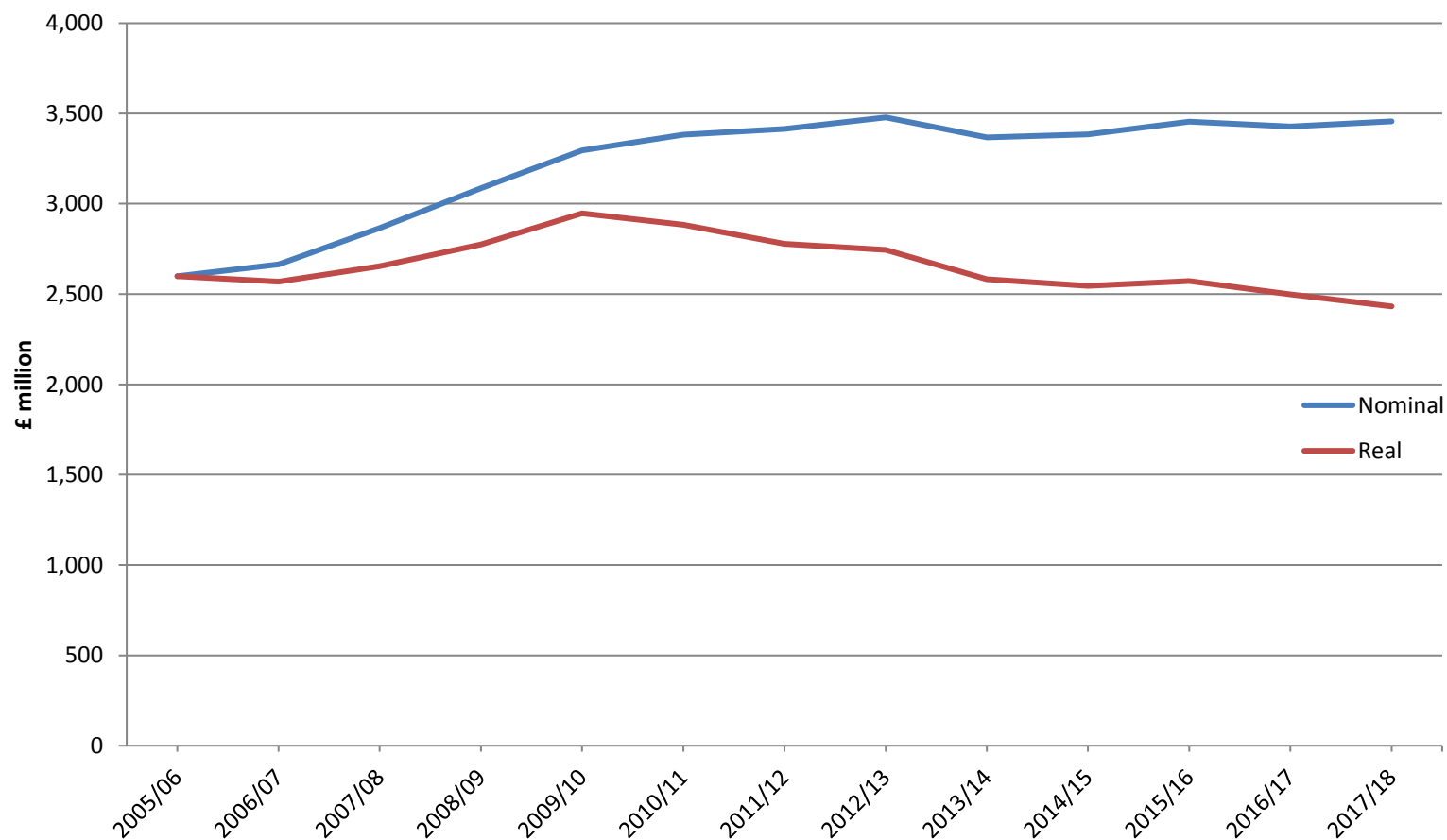
## PCR as a % of GDS/PDS Spend in England & Wales



	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
England	18.6	21.3	22.6	22.2	21.7	21.8	22.6	23.0	25.0	26.1	26.5	28.1	28.7
Wales	19.8	16.8	18.0	17.8	17.5	16.7	17.4	17.2	17.7	18.6	20.8	21.4	21.4

Source: Department of Health & Social Care and Welsh Government.

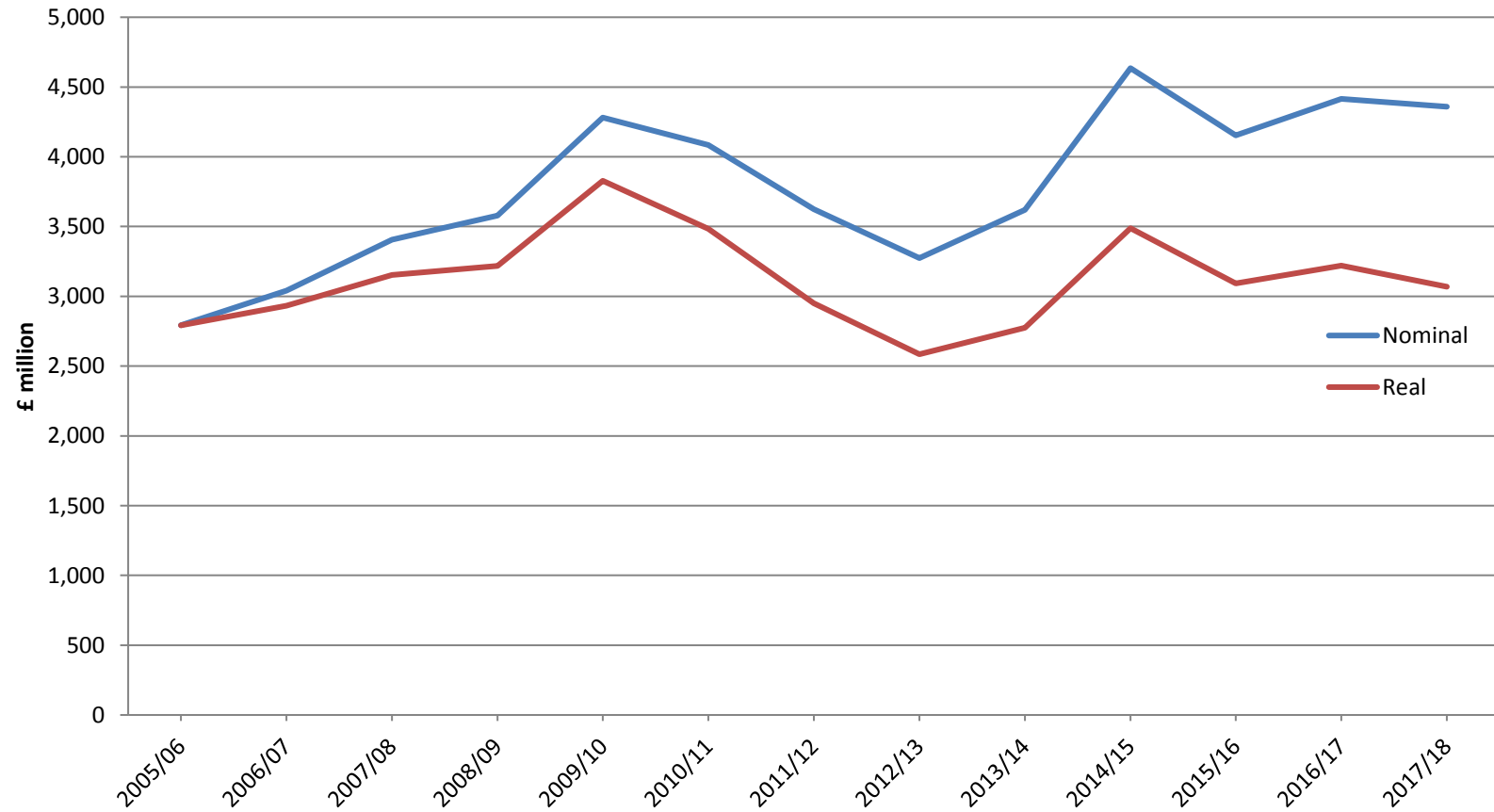
## GDS/PDS Gross Spend in UK



	<b>2005/06</b>	<b>2006/07</b>	<b>2007/08</b>	<b>2008/09</b>	<b>2009/10</b>	<b>2010/11</b>	<b>2011/12</b>	<b>2012/13</b>	<b>2013/14</b>	<b>2014/15</b>	<b>2015/16</b>	<b>2016/17</b>	<b>2017/18</b>
Nominal	2,599	2,664	2,866	3,086	3,295	3,383	3,414	3,478	3,367	3,384	3,454	3,428	3,457
Real	2,599	2,569	2,654	2,775	2,947	2,884	2,778	2,745	2,582	2,546	2,572	2,499	2,432

Source: Nominal values Department of Health & Social Care, Welsh Government, ISD Scotland and Health and Social Care Board NI, real values deflated by RPI.

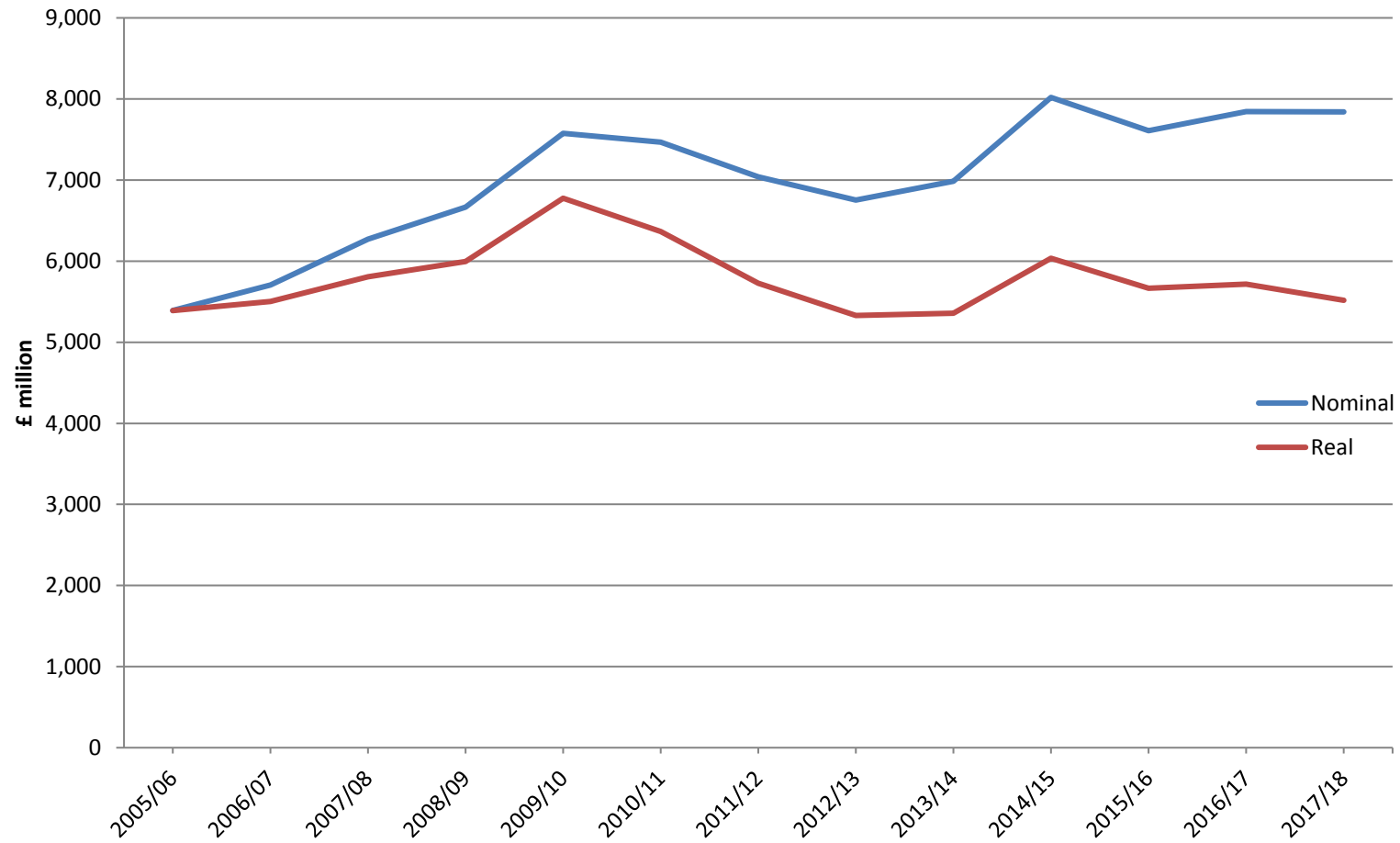
## Private Spend on High Street Dentistry in UK



	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Nominal	2,793	3,041	3,405	3,579	4,280	4,085	3,625	3,275	3,619	4,635	4,154	4,416	4,359
Real	2,793	2,933	3,153	3,218	3,828	3,483	2,950	2,585	2,775	3,488	3,093	3,219	3,069

Source: Estimated.

## Total Spend on High Street Dentistry in UK



	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
Nominal	5,392	5,705	6,271	6,665	7,575	7,468	7,039	6,753	6,986	8,019	7,608	7,844
Real	5,392	5,501	5,807	5,994	6,776	6,367	5,727	5,330	5,357	6,034	5,665	5,717