

NO WAITING ROOM

The Rise Of Next-Day
D e n t i s t r y

c o n t e n t s

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The Waiting Is Over: Introduction

There is a version of dentistry that many practice owners know all too well. Patients call to book, wait several weeks for an appointment, wait again for lab work to return, then wait once more for follow-up. The whole system is built on delay, and for most of its history, patients have accepted that delay as baked in. Healthcare moved at healthcare's pace, and that was that.

That assumption is now under serious pressure – and the pressure is coming not from within the profession, but from the world its patients inhabit day in, day out.

The same people sitting in dental waiting rooms are accustomed to ordering a meal from their phone and having it at the door in twenty minutes. They book a GP appointment in sixty seconds via an app. They expect a package ordered at midnight to arrive before lunch. The culture of on - demand expectation that has reshaped retail, food, finance and wider healthcare is now arriving in dentistry, and the practices that recognise this shift – and respond to it – stand to benefit substantially. Those that don't may well find the gap between patient expectation and clinical reality increasingly difficult to navigate.

This paper maps that shift and its commercial implications for UK dental and orthodontic practices. It draws on market data, demographic research, consumer behaviour analysis and clinical evidence to build a picture of a sector in genuine transition – and to identify where the real opportunities lie for practices willing to move with it.

The argument unfolds across five sections. We begin with the on-demand consumer in detail: who they are, how their expectations have been formed, and why dentistry is only beginning to feel the full force of their impatience.

We then turn to social media and the culture of aesthetic perfectionism it's generated, before exploring the significant and largely underexploited commercial opportunity presented by Britain's ageing population. Next, we look at the technology transforming the profession itself: digital workflow, 3D printing, artificial intelligence and robotics are not peripheral innovations but operational realities that are compressing treatment timelines and raising the standard of what is clinically possible.

The paper closes with a practical look at the new revenue streams available to practices willing to think expansively about their businesses, from professionally supervised aligner systems to next-day bespoke medical appliances, digital patient conversion tools and recurring revenue models.

Throughout, the paper draws on the work and expertise of Maintainers Dental Lab and its Glee Aligners system. Maintainers isn't a passive supplier to progressive practices; it's a strategic partner in the commercial transformation this paper describes. From industry-leading turnaround times to its orthodontist-designed Glee aligner treatment plans, patient conversion tools, marketing support, and simple workflow, Maintainers is built specifically for the kind of practice that is ready to meet the on-demand patient where they are.

The waiting room isn't just changing. It's disappearing. The practices that thrive in the next decade will be those that understand why and act on it.

How on-demand consumer culture is reshaping dental aesthetics and cosmetic dentistry – and the commercial opportunities for progressive UK practices

THE PATIENCE

01.

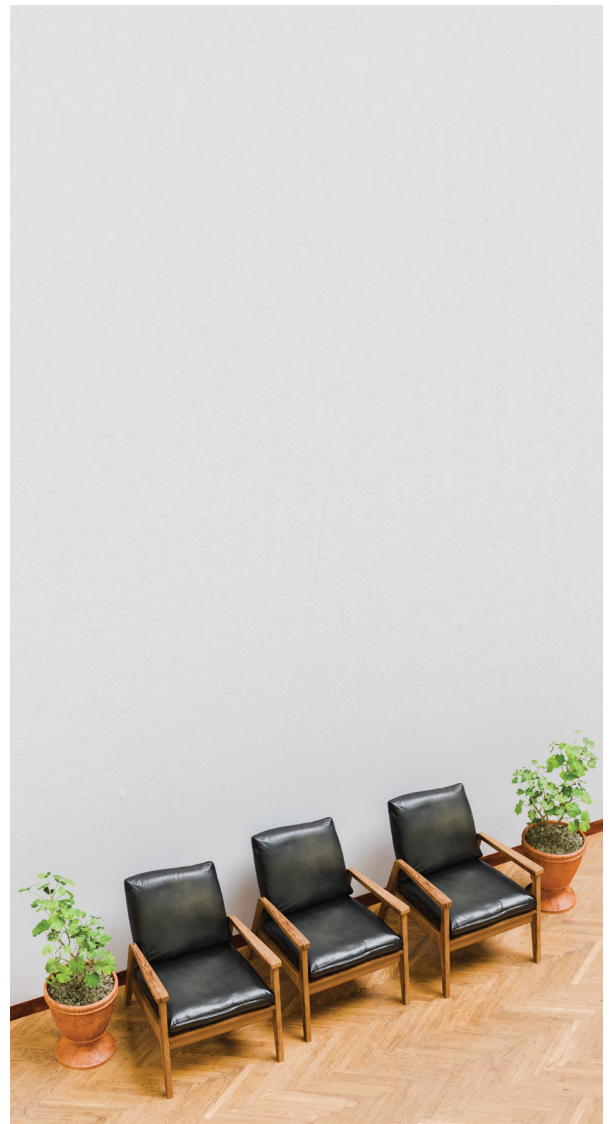
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DEFICIT

The On-Demand Consumer And The Aesthetics Boom

Something fundamental has shifted in the way people relate to waiting. Across almost every sector of the economy, the expectation of immediacy has moved from a premium option to a baseline requirement, and the businesses that have absorbed this shift most effectively are those gaining market share fastest. Dentistry isn't exempt from this dynamic. If anything, it's only just beginning to feel its full force.

Waiting is friction, and friction is the reason to go elsewhere.



96%

of consumers today cite fast delivery as a key factor in purchasing decisions.

the expectation of immediacy has moved from a premium option to baseline requirement.



rise of the on-demand economy

The Rise Of The On-Demand Economy

The transformation began in retail and logistics, accelerated sharply during the pandemic, and has since spread into virtually every consumer category. Food delivery's share of global food service spending more than doubled between 2019 and 2024, rising from 9% to 21%. Today, 96% of consumers cite fast delivery as a key factor in purchasing decisions, while recent research by McKinsey found that 39% have switched brands specifically to access faster fulfilment. Among consumers aged 18-34, the bar is set even higher: 56% now expect same-day delivery as a matter of course.

These shifts are not simply about logistics. They reflect a deeper psychological recalibration in what consumers consider reasonable. The global same-day delivery market is expected to reach \$14.7 billion (£11.1 billion) in 2025, growing at a CAGR of approximately 21%. Speed and convenience have ceased to be differentiators and have instead become entry requirements.

Businesses that cannot meet them are not perceived as slow: rightly or wrongly, they're perceived as failing.

56%

*of people aged 18-34, 56%
expect same-day delivery
as a matter of course.*



The 'Amazon Effect'

Amazon has set the pace. Having made free same-day delivery the standard for Prime members, the company pushed further still in early 2026, launching one-hour and three-hour delivery windows in thousands of American cities. The broader retail sector has had no choice but to follow: Walmart now offers same-day delivery to 93% of US households, targeting 95% coverage before the year is out. Each time the bar moves, consumer expectations move with it – and what once felt like sector-leading service quietly becomes the baseline.

This recalibration has now arrived in healthcare and aesthetics, a phenomenon widely described, perhaps

unsurprisingly, as the 'Amazon effect'. Where patients once accepted a three-week wait to see a GP as normal, platforms integrating digital booking and telehealth have compressed that to under sixty seconds. The principle established in retail, that waiting is friction, and friction is a reason to go elsewhere, is now also reshaping patient expectations of clinics, practices and treatment timelines.

The aesthetic and wellness sector has been particularly responsive. Today's consumer in this space is highly informed, selective and accustomed to personalisation. They conduct research before they book, compare options on their phones in real time, and have been

conditioned, largely by digital commerce, to expect transparency about cost and timelines. Forbes has identified what it calls "the instant fix" as one of the beauty industry's fastest growing trends, pointing to a consumer appetite for treatments that deliver visible, immediate results. That appetite has only intensified since.



89% 67%

Searches for Clear Aligners have risen 89% year on year.

Dental Implant enquiries are up 67%

The UK Cosmetic Dentistry Boom

Against this backdrop, the UK cosmetic dentistry market is growing steadily and with structural momentum behind it. The market was valued at £214 million in 2024 and is projected to reach £284 million by 2029, growing at a CAGR of approximately 5%. A separate analysis projects growth from £211 million in 2023 to £332 million by 2033, representing significant market value growth within a decade.

The drivers are both demographic and cultural. Patients are more proactive in seeking treatments that enhance appearance rather than simply restore function, with rising awareness of the link between smile confidence, self-presentation and wellbeing.

Searches for clear aligner brands have risen 89% year on year, while dental implant enquiries are up 67%. Meanwhile, composite bonding has emerged as the fastest growing segment, particularly among younger demographics seeking accessible and affordable smile enhancements.

🔍 clear aligner | ✕

clear aligner tips

clear aligners near me

clear aligners before and after

The search for a smile starts online,
will your practice be there?

Product Demand Across The Full Aesthetic Suite

This consumer shift is generating appetite across the full range of fast-turnaround dental aesthetic products, not just aligners. The global teeth whitening market was valued at \$8.08 billion (£6.1 billion) in 2024 and is forecast to reach \$12.40 billion (£9.4 billion) driven by growing consumer awareness of dental aesthetics and the influence of social media on beauty standards. In the UK, 84% of young people aged 18-35 engage with whitening products, with social media identified as the primary driver of discovery and demand (more on that in the next chapter).

Demand for both night and mouth guards is growing equally quickly, underpinned by rising diagnosis rates for bruxism and increasing participation in contact sports. The global dental night guard market was worth \$1.7 billion (£1.3 billion) in 2025 and is forecast to reach \$2.67 billion (£2.0 billion) by 2033, at a CAGR of approximately 6%. Sports guards, retainers and whitening trays are products with high repeatability: patients need to replace them, upgrade them or combine them with other treatments. **This makes them natural anchors for ongoing practice revenue.**

84%

of young people aged 18-35 engage with whitening products, with social media identified as the primary driver of discovery and demand.





*The fastest
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practices
aren't cutting
corners.
They're
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times.*

The Commercial Argument Takes Shape

What connects all these product categories isn't just growing demand, but a growing consumer expectation that they can be delivered quickly. Practices that can offer an aligner, retainer, whitening tray or night guard with a next-day or same-week turnaround, rather than the traditional wait of several weeks, are not simply more convenient: they're in sync with how their patients already expect the rest of their consumer lives to work. That positioning is a commercial advantage, and for practices willing to grasp it, it's available now.

The shorthand for this shift is 'Amazon-style instant results': the expectation,

now embedded across consumer culture, that speed isn't a bonus feature but a baseline. It's a phrase that Maintainers partner practices have themselves used to describe what next-day appliance turnaround means for their patients – and it captures something real.

Dental practices that can deliver on this expectation – not through shortcuts, but through the operational capability to turn around high-quality products the next day or same week – hold a real and growing competitive edge.

THE FILTER

02.

Social Media, Perfectionism And Rising Aesthetic Expectations

The Documented Influence Of Social Media

'Snapchat Dysmorphia' And The 'Zoom Effect'

The Cult Of Perfectionism

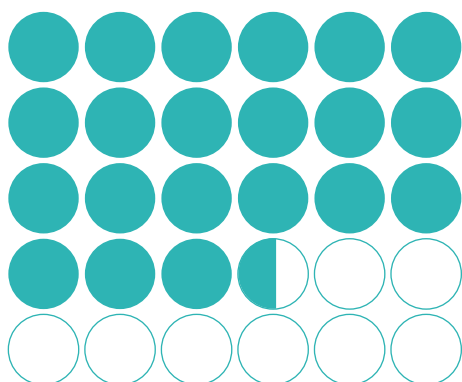
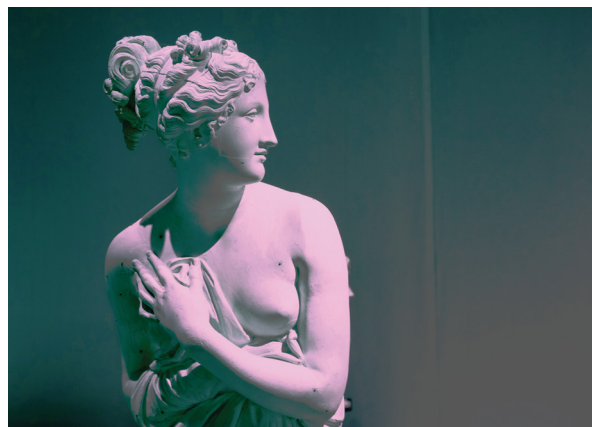
Taking It To Extremes - The (Troubling) Rise Of 'Looksmaxxing'

Commercial Implications For Dental Practices

EFFECT

Social Media, Perfectionism And Rising Aesthetic Expectations

We live, increasingly, in a visual economy. Billions of images are uploaded, filtered, liked and shared every day, and the cumulative effect on how people perceive their own appearance, and what they believe they're entitled to look like, has been profound. For dentistry, the implications are both clinically and commercially significant. The smile has become one of the most prominently scrutinised features in the age of the front-facing camera, and patient demand is shifting accordingly.



72%

of **patients** were **motivated by influencer posts** when choosing cosmetic dental treatments, with social media platforms identified as a **primary driver of treatment discovery** across all age groups.

Practices that can meet this demand with fast-turnaround, high-quality aesthetic products, and that can communicate their offering in the visual language patients are already fluent in, are well positioned to capture a patient cohort that is motivated, self-directed and, critically, willing to pay for results that match what they have already decided they want

The smile has become one of the most prominently scrutinised features in the age of the front-facing camera, and patient demand is shifting accordingly.

The Documented Influence Of Social Media

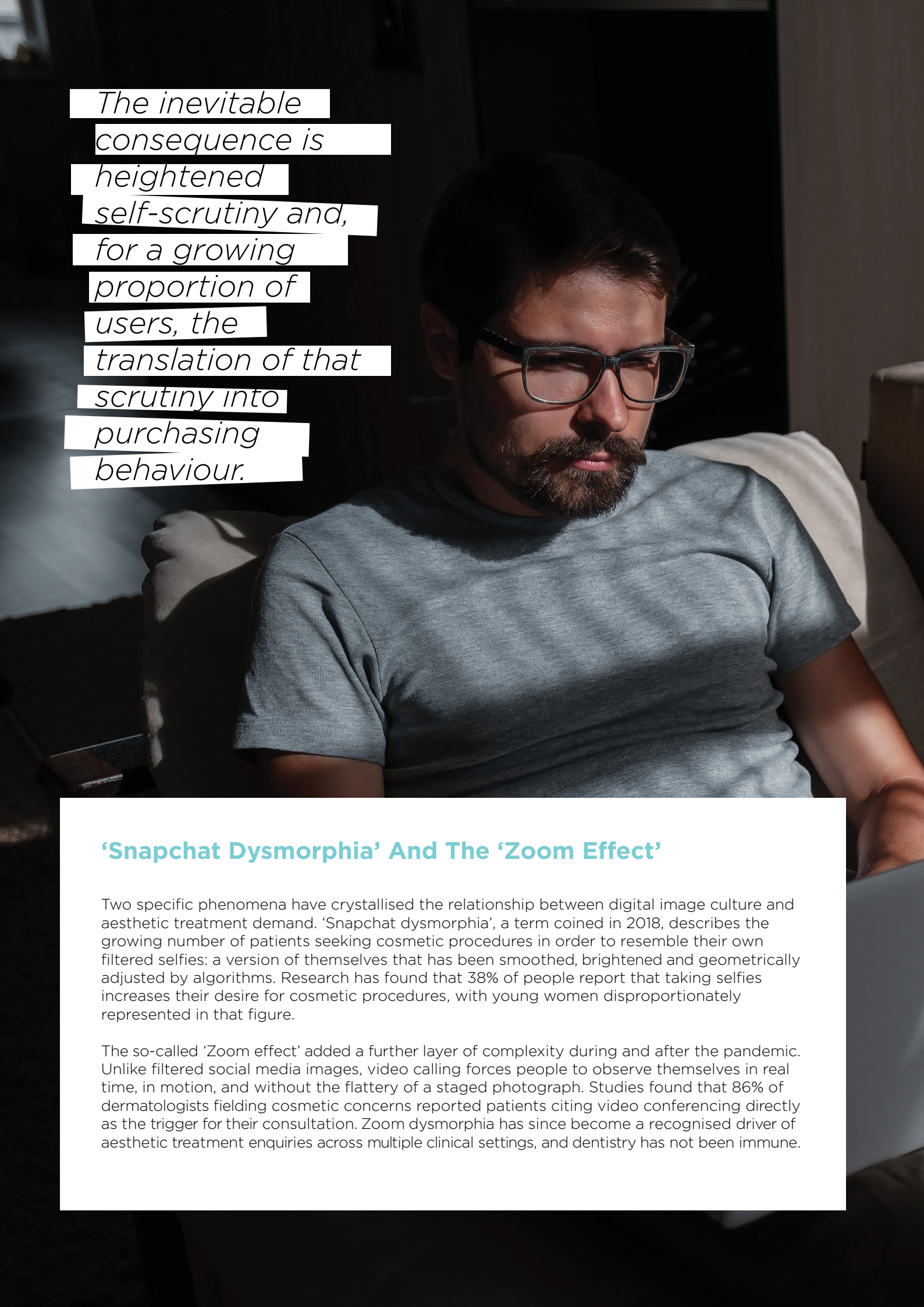
The research evidence linking social media use to cosmetic dental demand is now substantial and consistent. A major study published in Scientific Reports found that 72% of patients were motivated by influencer posts when choosing cosmetic dental treatments, with social media platforms identified as a primary driver of treatment discovery across all age groups. In the UK specifically, social media influences 73% of cosmetic dental decisions among patients aged 25-45, a cohort that represents the core of private and self-pay dental practice income.

Orthodontists are feeling this dynamic directly. Over a third of UK orthodontists (38%) report that their adult patients are explicitly influenced by celebrities and influencers, and more than half (60%) say that increased time spent on video calls and online platforms is a significant factor driving people to seek treatment. Meanwhile, 70% of orthodontic patients now use social media to research treatment options before they book. Notably, however, 40% of the content they encounter contains inaccurate or misleading information, which of course presents a challenge for practitioners trying to manage expectations.

The numbers translate into market momentum. Among adults under 35 in the UK, 40% had already whitened their teeth by 2020 and 48% were actively planning to do so. We've already mentioned that web searches for clear aligner brands are significantly up, and it's a market that continues to expand rapidly. The desire for a socially presentable, camera-ready smile is no longer a vague aspiration: it's become a mainstream consumer priority.

88%

*of adults aged 35 and under have either **had teeth whitening** or are **actively planning to do so.***



*The inevitable
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‘Snapchat Dysmorphia’ And The ‘Zoom Effect’

Two specific phenomena have crystallised the relationship between digital image culture and aesthetic treatment demand. ‘Snapchat dysmorphia’, a term coined in 2018, describes the growing number of patients seeking cosmetic procedures in order to resemble their own filtered selfies: a version of themselves that has been smoothed, brightened and geometrically adjusted by algorithms. Research has found that 38% of people report that taking selfies increases their desire for cosmetic procedures, with young women disproportionately represented in that figure.

The so-called ‘Zoom effect’ added a further layer of complexity during and after the pandemic. Unlike filtered social media images, video calling forces people to observe themselves in real time, in motion, and without the flattery of a staged photograph. Studies found that 86% of dermatologists fielding cosmetic concerns reported patients citing video conferencing directly as the trigger for their consultation. Zoom dysmorphia has since become a recognised driver of aesthetic treatment enquiries across multiple clinical settings, and dentistry has not been immune.



The Cult Of Perfectionism

Underlying these trends is a broader cultural shift that predates social media but has been turbocharged by it. Research published by the American Psychological Association found that the pursuit of 'perfectionism' among young people increased significantly between 1989 and 2016, with socially prescribed perfectionism, the belief that others hold you to impossibly high standards, rising by 33%. This form of perfectionism is particularly closely linked to social media behaviour, where the relentless performance of an idealised self creates both the pressure and the aspiration to conform to standards that exist almost nowhere – except on screen, of course.

As of 2024, 98% of Gen Z-ers and 97% of millennials in the UK were active social media users. These are the two largest consumer demographics for cosmetic dental treatment, and they're spending significant portions of their daily lives in an environment specifically designed to surface the most polished, filtered and aesthetically optimised versions of other people. The inevitable consequence is heightened self-scrutiny and, for a growing proportion of users, the translation of that scrutiny into purchasing behaviour.

Taking it to extremes – the (troubling) rise of ‘looksmaxxing’

Taking It To Extremes – The (Troubling) Rise Of ‘Looksmaxxing’

Nowhere is this scrutiny more starkly illustrated than in the rise of ‘looksmaxxing’. At the more extreme end of the trends we’re exploring in this paper, it’s essentially the systematic pursuit of physical optimisation, predominantly among young men. It originated in fringe online incel (a portmanteau of ‘involuntary’ and ‘celibate’) forums before breaking into mainstream culture, generating billions of views across TikTok hashtags and spawning a dedicated influencer ecosystem.

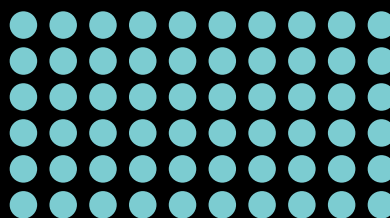
Looksmaxxing has made facial ‘optimisation’ an increasingly mainstream male pursuit. Controversial influencers such as ‘Clavicular’ promote appearance-rating systems and aspirational aesthetics, while ‘mewing’ – a tongue-posture technique claiming to reshape the jawline – has entered popular consciousness, despite zero clinical evidence of its effectiveness (the inventor of the technique, Dr Mike Mew, was struck from the UK dental register in 2024).

A 2025 community survey found 49% of looksmaxxers were considering aesthetic procedures; BAAPS reports a 26% rise in male face and neck procedures since 2024. The lengths some are prepared to go to are polarising, even downright dangerous, but these young men will arrive at practices not in browsing mode, but already briefed. To borrow their own parlance, they’re looking to become ‘Chads’ – i.e. to attain their hyper-idealised vision of masculine physical perfection.

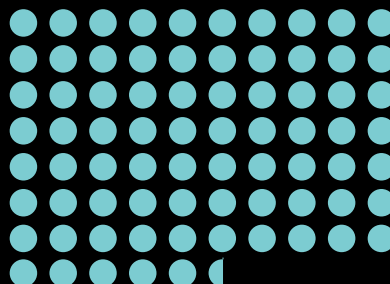
26%

Rise in **male** face and neck procedures since 2024.

2024



2026



49%

of looksmaxxers
were considering
aesthetic
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Commercial Implications For Dental Practices

For practices, the commercial read-through is straightforward: the patients walking through the door are increasingly motivated by visual and social confidence rather than purely by clinical need. They arrive having already seen a smile transformation on TikTok, researched their preferred treatment on Instagram and formed a firm expectation of what their outcome should look like.

The 'BBL teeth' trend, which went viral on TikTok and positioned hyper-white, camera-optimised smiles as aspirational, is only the most recent example of how quickly an aesthetic idea can move from social content to clinical enquiry.

Practices that can meet this demand with fast-turnaround, high-quality aesthetic products, and that can communicate their offering in the visual language patients are already fluent in, are well positioned to capture a patient cohort that is motivated, self-directed and, critically, willing to pay for results that match what they have already decided they want.

THE SILVER

03.

*UK Demographics And The Ageing Population
The Scale Of The Shift
A Revolution In Tooth Retention
From Function To Aesthetics
The NHS Withdrawal And The Private Opportunity*

OPPORT UNITY



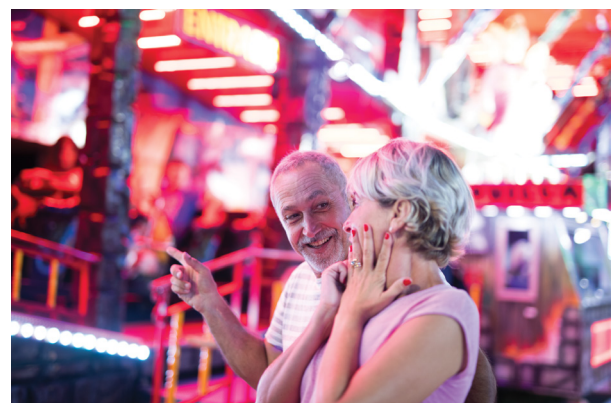
UK Demographics And The Ageing Population

There's no escaping the fact that the UK is getting older, and the numbers tell a story that every dental practice owner in the country should pay close attention to. The demographic shift currently under way isn't a slow, distant trend: it's a structural transformation of the patient base, already in progress, and it carries significant and largely underexploited commercial implications for practices willing to look at it clearly.

The Scale Of The Shift

Almost one in five people in England (19%, or 11 million) is currently aged 65 or over. By 2039, the number of people aged 75 and over is projected to double, from five million to nearly ten million. Looking further ahead, the Office for National Statistics (ONS) projects that by 2065, 26% of the UK population will be aged 65 or over, and 46% will be aged 50 or over. The number of people aged 85 and above is forecast to almost double from 1.7 million today to 3.3 million by 2047.

These are not marginal demographic adjustments: they represent a wholesale reshaping of who the UK population is, and, by extension, who dental patients are.



THE BIGGEST UNTAPPED REVENUE OPPORTUNITY IN DENTISTRY? THE OVER 50'S

A Revolution In Tooth Retention

Alongside this demographic shift is a parallel transformation in oral health outcomes that is fundamentally changing what older patients need and expect from their dentists. The downward trend in edentulism over the past half-century has been remarkable. In 1978, more than three-quarters (78%) of adults aged 65 and over had lost all their natural teeth. By 2023, according to the Adult Oral Health Survey, that figure had fallen to just 4% among 65 to 74-year-olds and 11% among those aged 75 and over. Today, nine in ten adults over the age of 75 in England still have their own teeth, and half of all adults in this age group retain at least 21 natural teeth, the clinical threshold associated with a functional bite, better nutrition and improved quality of life.

This is a profound shift in the nature of demand. Older patients with largely intact natural dentitions do not simply need extractions and dentures: they need maintenance, restoration, protection and, increasingly, enhancement. Research published in

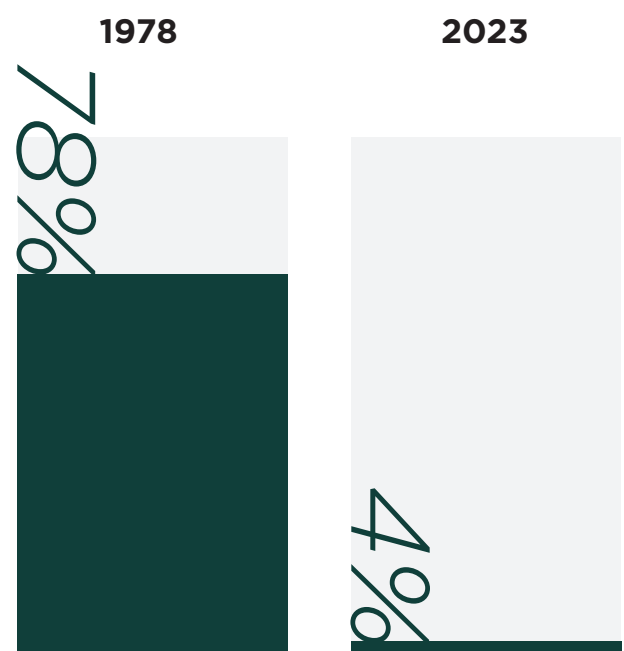
the British Dental Journal notes that older patients who've already invested in implants and cosmetic procedures over the course of their lives will not be satisfied with a merely functional dentition.

They want it to look good too.

The clinical and aesthetic expectations of today's older patient cohort are substantially higher than those of any previous generation.



Adults aged 65 and over losing their natural teeth.



From Function To Aesthetics

That expectation is reflected in broader consumer behaviour. The over-50s currently account for £320 billion of annual household spending in the UK and hold over three-quarters of the nation's financial wealth. Spending within this group has grown at an average of 4.4% a year over the past decade, faster than any other demographic, and by 2030 the over-50s are projected to account for around 60% of all UK consumer spending. Crucially, health, wellness and aesthetics sit prominently within their spending priorities: 71% of UK consumers invested in wellness in the last twelve months, and health and beauty spending grew by 7.1% in 2024.

The aesthetic procedures market tells a similar story. Approximately 640,000 cosmetic procedures were performed in the UK in 2025, up 12% from 2024 and nearly double the figure from 2015.

The **biggest growth** has been in the 45 to 64 age group, and one Manchester clinic recorded a

47% increase in patients over 50 between 2022 and 2025.

The desire to look as good as one feels does not diminish with age: for an affluent, active and longer-living older population, it grows.

The commercial implication here is one that experienced practitioners have long understood: people will find money if they want to improve themselves. Aesthetic dental treatment, in this context, isn't a discretionary luxury that patients weigh against other expenditure it's a self-investment they have already decided to make. The practice's job, therefore, becomes to make it easy to say yes.

The NHS Withdrawal And The Private Opportunity

Compounding all of this is the well-documented contraction of NHS dental provision. Just two-fifths of England's adult population saw an NHS dentist in the two years to March 2024, down from nearly half pre-pandemic. There are now 483 fewer dentists providing NHS care than there were in 2019-20, and private dental fees have risen by as much as 22% between 2022 and 2024.

For practices, the strategic read-through is clear. An ageing population with high levels of natural tooth retention, elevated aesthetic expectations, significant disposable wealth, declining access to NHS care and a proven willingness to pay for quality represents a substantial and growing revenue opportunity. The clinical needs of this cohort, spanning complex restorations, maintenance appliances, night guards, retainers and aesthetic treatments, align directly with the high-quality, fast-turnaround bespoke medical appliance offering that the most forward-looking labs and practices are now in a position to deliver.

Crucially, this opportunity isn't confined to exclusively private practices. Even predominantly NHS practices can integrate aesthetic and elective treatments to supplement their core NHS income, and patients will seek out these treatments regardless of a practice's primary model.

There's also a practical efficiency argument here: faster appliance turnaround from a quality lab partner allows dental nurses to check fits more readily, reducing chair time and making the overall workflow more profitable even within an NHS context. The two models need not be in opposition; a thoughtfully integrated offering can strengthen both the patient proposition and the bottom line.





***The future is moving
fast. Keep up.***

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A PROFESSION

04.

*The Shifting Nature Of Dentistry And Orthodontics
Digital Workflow: Where Adoption Begins
3D Printing: From Novelty To Necessity
Artificial Intelligence: From Diagnosis To Design
Robotics: The Next Frontier
Why Digital Adoption Can't Wait*

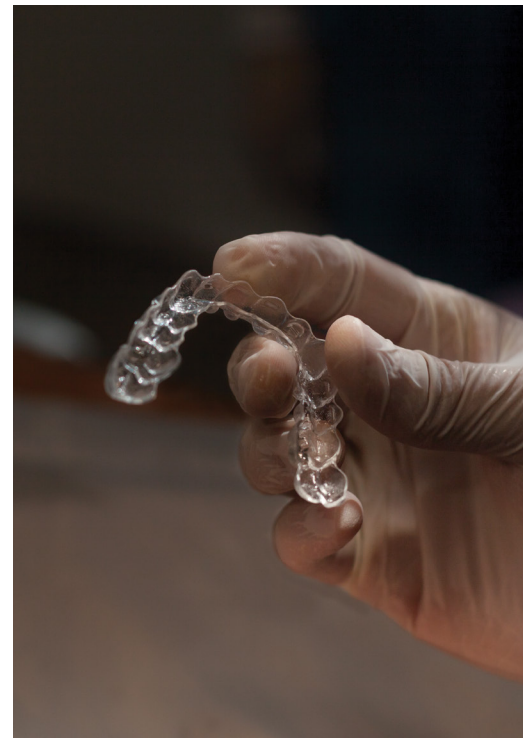
IN MOTION

The Shifting Nature Of Dentistry And Orthodontics

Dentistry is in the midst of its most significant technological transformation in decades – and that is enabling practices to serve both the on-demand consumer and the ageing patient.

Across the UK and globally, a convergence of 3D printing, artificial intelligence and robotics is reshaping how dental and orthodontic care is designed, delivered and experienced.

These shifts aren't on the horizon: they're happening now, at pace – and their commercial implications for practices and labs alike are substantial.



Digital Workflow: Where Adoption Begins

Digital workflow is the foundation everything else in this chapter builds on, and for most UK practices, the natural starting point for technology adoption. Intraoral scanners have become simultaneously more powerful and more affordable, enabling practices to capture precise three-dimensional data and transmit it to labs instantly. This eliminates the distortion risk associated with physical impressions and provides accuracy down to the level of microns. The practical results are faster treatment planning, fewer remakes and significantly shorter patient journeys.

For the dental lab sector, this digital revolution is redefining what is operationally possible. The ability to receive a scan, design a bespoke appliance using CAD software, produce it via 3D printing and dispatch it the following day is, for advanced providers like Maintainers, already a reality.

And for practices, that speed translates directly into competitive advantage, one that patients, shaped by a broader culture of on-demand expectation, are both seeking out and willing to pay for.

3D Printing: From Novelty To Necessity

Three-dimensional printing has moved swiftly from a niche innovation to a mainstream production tool within dental and orthodontic practice. The UK dental 3D printing market was valued at approximately £102 million in 2024 and is projected to reach £420 million by 2035, growing at a compound annual growth rate (CAGR) of approximately 14%. Separate market analysis suggests the figure could climb as high as £697 million by 2032, underlining the scale of investment flowing into this technology. The growth is being driven by demand for highly

precise, customised dental solutions. 3D printing now underpins the production of transparent aligners, bespoke brackets, surgical guides and retainers with a level of accuracy that traditional manufacturing simply cannot match. Crucially, it also collapses production timelines. Where conventional lab processes might take weeks, a digital workflow integrating 3D printing can reduce this to days, or in the case of specialist facilities, to overnight. For orthodontic labs operating at the leading edge of this shift, a rigorous fabrication process incorporating CAD/CAM

design, 3D printing, curing, vacuum-forming and hand-finishing is no longer exceptional: it's the emerging benchmark.

*It's the
emerging
benchmark.*





AI systems are already automating up to 90% of patient care management tasks, from smart scheduling to automated patient education and case acceptance tools, freeing clinicians to focus on treatment rather than administration.

Artificial Intelligence: From Diagnosis To Design

Artificial intelligence: from diagnosis to design Perhaps the most transformative force currently at work in dentistry is AI, which is now woven throughout the entire clinical and laboratory workflow. The global AI dental market was valued at \$559.2 million (£422 million) in 2025 and is forecast to reach \$3.26 billion (£2.46 billion) by 2034, representing a CAGR of approximately 22%, with the orthodontics segment leading adoption.

The clinical applications are already remarkable. AI-powered diagnostic tools are achieving over 90% accuracy in detecting caries and periodontal disease from panoramic radiographs, catching issues earlier and significantly reducing the margin for human error. In orthodontics specifically,

AI models can predict treatment outcomes with up to 73% accuracy and have achieved a 96% success rate in determining whether surgical intervention is required, using lateral cephalometric radiographs. These are not marginal gains: they represent a genuine step change in clinical precision and treatment planning.

The practice management dimension is equally striking. **AI systems are already automating up to 90% of patient care management tasks, from smart scheduling to automated patient education and case acceptance tools, freeing clinicians to focus on treatment rather than administration.**

AI technology is moving from an optional add-on to expected feature fast.



Robotics: The Next Frontier

While robotics remain at an earlier stage of mainstream adoption than 3D printing or AI, the direction of travel is unambiguous. The global robotic dentistry market was valued at \$600 million (£453 million) in 2024 and is growing at a CAGR of approximately 21%. Systems such as Yomi in the US – the first FDA-cleared robotic device for dental surgery – are enabling implant placement with a level of accuracy previously unachievable by manual means, reducing error margins and accelerating procedure times.

In a landmark moment for the sector, July 2024 saw an autonomous AI-controlled robot complete an entire dental procedure on a human patient, finishing the task approximately eight times faster than a dentist working manually. While fully autonomous robotics in routine clinical settings remains some way off, the trajectory is clear: robotics will increasingly assist, augment and, in certain applications, automate procedures that currently demand significant clinician time and technical skill.

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If a practice cannot meet them on speed
and experience, they will simply take that
investment elsewhere.*

Why Digital Adoption Can't Wait

The case for efficiency is straightforward. The speed and turnaround that today's aesthetic market expects can only be delivered through a digital workflow. Practices still relying on conventional impressions and manual lab processes are not simply slower: they are structurally unable to meet the timelines patients now treat as standard.

The risk of inaction is just as real. Practices that put their head in the sand on technology are, often without realising it, losing an informed and aesthetically engaged clientele to more progressive competitors nearby. These patients have already decided to invest in their smile. If a practice cannot meet them on speed and experience, they will simply take that investment elsewhere.

The practices that have already made the shift are seeing the benefit. Early adopters of digital workflow, 3D printing and AI-supported diagnostics are doing well out of it, attracting a clientele with higher residual income and a stronger appetite for ongoing aesthetic treatment. For these practices, technology adoption has not been a cost: it has been a growth strategy.

What follows is a practical look at how that growth can be structured: through new revenue streams, recurring revenue models and the kind of commercial partnerships that make rapid adoption achievable for practices of any size.

BEYOND THE

05.

*New Revenue Streams For Dental Practices
A Market In Transition
The D2C Cautionary Tale And The Professional Dividend
Glee Aligners: Perfect Positioning
Patient Conversion And The Power Of Digital Tools
The In-House Lab Question
What Sets Maintainers Dental Lab Apart
Building The Recurring Revenue Model*

APPOINT MENT



New Revenue Streams For Dental Practices

The business model for UK dental practice is under greater pressure than at any point in recent memory, and the most forward-thinking practice owners are responding not by retreating but by expanding.

The structural contraction of NHS provision, combined with the demographic and cultural shifts explored elsewhere in this paper, has created a tangible commercial opportunity for practices willing to think beyond the conventional appointment schedule. On-demand orthodontic appliances, fast-turnaround aesthetic products and professionally supervised aligner systems are not peripheral additions to a practice's offering: for a growing number of UK practices, they're becoming the primary engine of profitability and growth.

A Market In Transition

The numbers tell a compelling story. Private dental services now account for 69% of the UK dental market, valued at £8.4 billion in 2023-24, and one in five people in Great Britain used private dental care in 2024. Over 12 million UK adults currently face unmet dental needs due to difficulties accessing NHS care, and with more than 483 fewer dentists providing NHS services in 2023-24 compared to 2019-20, that figure is unlikely to diminish. The patients are there. The question is whether practices are equipped to capture them.

Cosmetic and aesthetic treatments are the fastest

growing and most profitable segment of this private opportunity. Orthodontics sits at the heart of it. The European clear aligner market was valued at \$1.95 billion (£1.5 billion) in 2023 and is projected to reach \$19.98 billion (£15.1 billion) by 2033, a compound annual growth rate of 26.2%. At a global level, the clear aligners market is forecast to grow from \$4.66 billion (£3.5 billion) in 2025 to \$13.65 billion (£10.3 billion) by 2031.

Aligner cases command high treatment values, generate extended patient relationships of 18-24 months, and create natural cross-sell opportunities

into retainers, whitening trays and maintenance appliances. For practices that have not yet actively developed this revenue line, the question isn't whether the market exists but how to access it efficiently and profitably.

A primary engine of profitability and growth.



The D2C Cautionary Tale And The Professional Dividend

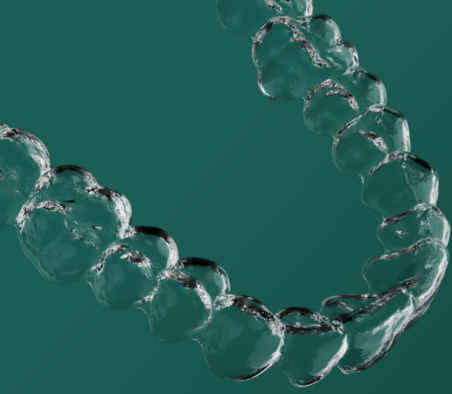
The direct-to-consumer (D2C) orthodontics sector arrived in the UK with considerable fanfare, promising patients affordable teeth straightening without the inconvenience of clinical visits. The US company Smile Direct Club was the most prominent brand trying to capitalise on this shift and was once valued at £7 billion. It filed for bankruptcy in September 2023, ceasing operations entirely, and leaving its UK patients mid-treatment without support or recourse.

The reasons for its failure go beyond business model economics. The British Dental Association, the General Dental Council and the British Orthodontic Society had all raised concerns about D2C models

long before the collapse. The clinical risks are documented: without proper in-person assessment, patients with undetected gum disease or underlying decay can be given aligner treatment that actively worsens their condition. The GDC published guidelines in 2021 making clear that orthodontic treatment constitutes regulated activity, and that direct clinician-to-patient interaction isn't optional but essential. Cases of advanced gum disease, unstable bites and, in the worst instances, tooth loss have been attributed to D2C treatment.

For professionally supervised aligner providers, the collapse of SmileDirectClub isn't just a

cautionary tale: it's a commercial opportunity. Patients who sought D2C options did so because they wanted accessibility, speed and competitive pricing. Those needs haven't gone anywhere. What is now clear to a much wider audience, including the patients themselves, is that the unsupervised route carries real clinical risk.



24-48 Hours

*Treatment Plan Created
by Orthodontist*

10-14 Days

*Aligners manufactured
& delivered*

Glee Aligners: Perfect Positioning

Glee Aligners is positioned precisely in this gap: exclusively available through registered dentists and orthodontists, professionally led from assessment through to retention, and designed to deliver the speed and accessibility patients want without sacrificing the clinical oversight they need.

The brand itself embodies this dual positioning – and its recent rebrand is a considered move into lifestyle territory, signalling that the product enables confidence rather than merely corrects teeth. In a market split between price-led D2C brands and specification-led clinical ones, Glee occupies different ground: emotionally resonant but clinically rigorous. That mix makes for a genuine differentiator practices can capitalise on when they present treatment.

The Glee patient journey is structured around three clear stages that make this promise concrete. It begins with a free E-Consultation followed by a professional assessment and 3D scan – ensuring clinical suitability from the outset.

Treatment plans are then generated quickly, with aligners manufactured and ready within as little as two weeks of scan submission. The final stage is a formal retention plan, including a free retainer, to secure the result long-term.

That last detail matters more than it might appear: since teeth move throughout life, the inclusion of retention within the standard package rather than as an add-on provides a point of difference against both D2C providers and some traditional competitors.

It's also the kind of transparent, no-surprises value proposition that builds patient trust and encourages long-term practice loyalty.



Orthodontic Led System

1 to 1 Clinical Support

Dedicated Account Manager

E-Consultation

Professional Assessment

3D Scan



The In-House Lab Question

Some practices, attracted by the idea of greater control and tighter margins, have explored running their own in-house dental lab. The reality has proved more challenging than the proposition suggests.

Setting up and maintaining a functioning in-house lab requires a significant capital investment in equipment, CAD-proficient technical staff, 3D printing hardware, materials and ongoing software licences. Managing volume fluctuations creates backlog risk, and the fulfilment burden of running a lab operation alongside a clinical practice is substantial. A number of orthodontic practices that have attempted this model are struggling with precisely these pressures.

The case for outsourcing to a specialist lab is therefore not simply one of convenience: it's a commercially rational decision that allows practices to access world-class appliance quality and operational speed without absorbing the fixed costs, staffing complexity and technical risk of in-house production.

Patient Conversion And The Power Of Digital Tools

Capturing aligner patients requires more than clinical capability: it requires a patient journey that removes hesitation at the earliest possible stage. The data on patient behaviour is instructive. Leads contacted within five minutes of initial enquiry are ten times more likely to convert, yet the average practice response time remains 47 hours. Practices that implement structured, automated follow-up systems increase conversion rates by 47%.

This is precisely the problem that tools such as Glee's Smile Steps are designed to solve. Smile Steps is an online assessment tool that pre-qualifies potential aligner patients before they set foot in the practice. Patients complete a short digital assessment from their phones, providing the practice with their contact details, photographs and treatment goals in advance.

The effect is significant: patient hesitation around cost and treatment time is addressed upfront, increasing case conversion rates, while the practice receives warm, pre-qualified leads rather than cold enquiries. Smile Steps can be integrated directly into a practice website, creating a seamless digital entry point that functions as a round-the-clock patient acquisition tool.



WHAT SETS MAINTAINERS DENTAL LAB APART.



Maintainers offers the kind of proof-point-rich partnership that makes this argument concrete. With over 35 years of experience in the dental industry and more than 4000 appliances manufactured each month, the lab has the scale and operational maturity to deliver consistency and reliability at volume. Combined with its operational efficiency, which enables next-day turnaround as standard, the lab provides partner clinicians and practices with a clear service and operational advantage.

The lab's aligner brand, Glee, delivers cases within 7-10 working days from treatment plan submission, alongside a market-leading 16% refinement rate that minimises wasted chair time and reduces the number of cases requiring correction.

A five-year treatment promise, under which new aligners are provided at no additional cost if intended outcomes are not met, removes risk for practice and patient alike.

Crucially, every Glee treatment plan is designed by an experienced orthodontist, not generated by an algorithm or produced by a technician. In an era where AI is reshaping much of the clinical workflow, that human expertise at the planning stage provides clinical assurance for practices and patients alike, and a clear point of difference from the AI-led or technician-led models that some competitors rely on.

The lab's next-day orthodontic appliance offering includes retainers, night guards, sports guards, dual laminates and whitening trays manufactured using medical-grade thermoplastic. **For digital cases submitted by 2pm, all these appliances are delivered on a next day turnaround as standard.**

*For digital cases
submitted by 2pm,
all these appliances
are delivered on a
next day turnaround
as standard.*

**HAVE MAINTAINERS SET
THE TONE
DENTAL
ACROSS
THE**

**THE NEW
FOR
LABS
UK?**

82%

of practices that implement them report a revenue increase within the first year, and enrolled patients accept 50 to 75% more treatment than uninsured equivalents.

What Sets Maintainers Dental Lab Apart

For practices looking to respond to patient demand for immediacy while sustaining strong margins, this combination of speed, quality and clinical assurance is, as partner practices have described it, a genuinely transformative operational proposition.

In an era of Amazon-style instant expectations, it is the kind of offer patients have already been conditioned to receive – and that progressive practices are now in a position to deliver.

The partnership extends well beyond the lab itself. Every Maintainers and Glee practice account is assigned a dedicated account manager who supports

onboarding, training and ongoing technical and marketing needs – a meaningful reassurance for practices integrating a new system for the first time.

Partner practices also benefit from access to Maintainers University, an educational resource designed to deepen clinical and commercial knowledge around orthodontics appliances and aligner treatments. When it comes to Maintainers Lab, and Glee Clear Aligners the pricing structure is built with practice profitability in mind: volume-based price breaks allow practices to sustain strong margins without passing disproportionate costs on to patients a model designed so that Glee can be a genuinely

competitive patient facing option while remaining commercially viable for the practice.

The operational credentials are also worth noting: from a standing start, Maintainers grew from one major client to over 670 in just six months – a rate of adoption that is testament to both the quality of the offering and the scale of unmet demand it's addressing.

Next Day Delivery As A Standard



Building The Recurring Revenue Model

Looking further out, the broader business model opportunity extends beyond individual treatment episodes. Membership and subscription plans are gaining significant traction in UK private practice: 82% of practices that implement them report a revenue increase within the first year, and enrolled patients accept 50 to 75% more treatment than uninsured equivalents.

Retainers, night guards and whitening trays are inherently repeatable products, with patients returning for replacements and upgrades over time. Positioned within a structured patient membership or maintenance plan, they create a reliable recurring revenue line that insulates a practice from the volatility of appointment-led income and builds the kind of long-term patient relationships that are the foundation of a sustainably profitable business.

CONCLU — SION

The market has changed
the on-demand era isn't
coming to dentistry, it's
already arrived.

Ready When They Are

Conclusion: Ready When They Are

The five chapters of this paper have traced a remarkably coherent set of forces. In living rooms, on commutes and during lunch breaks, consumers are scrolling through content that is actively reshaping their aesthetic expectations and their willingness to act on them. A culture of perfectionism is translating filtered ideals into clinical enquiries, particularly for younger patients. Meanwhile, a generation of older, wealthier, more dentally aware patients is arriving with natural teeth, significant spending power and aesthetic ambitions that match both.

Patients' expectations of speed have evolved. Those who decide they want to whiten their teeth expect to begin treatment tomorrow, not weeks later. When a retainer breaks, patients expect and often clinically need a replacement the next day. Speed is no longer simply a matter of convenience. It is becoming an expectation.

In surgeries and labs across the UK, 3D printing, AI and robotics are compressing production timelines that once took weeks into processes that take hours. And the failure of unsupervised direct-to-consumer orthodontics has created a clear and documented appetite for exactly what professionally supervised care can offer.

These aren't isolated trends. They're converging, and they're converging now.

The practices set to benefit most from this tipping point are those that grasp a fundamental shift in the nature of their business. Dentistry is no longer simply a healthcare service that happens to have commercial elements. For a growing proportion of patients, it's a lifestyle investment, driven by the same consumer logic that governs every on-demand purchase they make: immediacy, quality, transparency and trust. Practices that speak this language - that can offer fast-turnaround bespoke appliances, professionally overseen aligner treatment and frictionless digital patient journeys - aren't simply keeping pace with the market. They're positioning themselves at its leading edge.

The tools to do this are available, the clinical evidence is compelling, and the commercial case is clear. Glee Aligners, backed by the operational infrastructure of Maintainers Dental Lab, offers a rare combination of emotional brand resonance, clinical rigour and practice-level commercial support that makes this transition genuinely achievable. From the Smile Steps patient acquisition tool to dedicated account management, from next-day bespoke appliance turnaround to margin conscious pricing, the partnership is built not just to deliver outstanding results for patients but to protect and grow the businesses that care for them.

The market has changed - the on-demand era isn't coming to dentistry, it's already arrived. Patient expectations have changed - they've already decided what they want, and they want it now. The question, for every practice owner, is a straightforward one: has your practice changed? Because those practices that act now will be the ones patients find first - and return to most.



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Why We Commissioned No Waiting Room

To shape No Waiting Room, we partnered with Working the Future to bring an independent, forward-looking perspective to one of the most significant challenges facing UK dentistry: understanding how patient expectations are evolving and what this means for the future of dental practices. As consumer behaviours continue to shift, practices must look beyond today's market conditions and anticipate the changing needs, preferences and motivations that will define tomorrow's patients.

At Maintainers, we work alongside practices every day, supporting them with digital workflows, high-quality laboratory services, rapid turnaround times and operational solutions designed to help them deliver outstanding patient care more efficiently. This close partnership has given us first-hand insight into the pressures practices face, from increasing patient expectations and workforce challenges to rising commercial demands. It has also reinforced our belief that the future of dentistry will be shaped not only by clinical excellence, but by the ability to create seamless, convenient, and patient-centred experiences.

That is why we engaged Working the Future: to look beyond anecdotal evidence and develop an independent, evidence-based view of both the current landscape and the emerging trends that will influence patient choice, engagement, and loyalty over the coming years. By combining their expertise in future trends and consumer behaviour with Maintainers' deep understanding of the operational realities of modern dental practice, No Waiting Room provides a strategic perspective on where the profession is heading.

The insights presented in this white paper are intended to help practice owners and leaders make informed commercial decisions, optimise their operations, embrace digital transformation, strengthen patient relationships, and identify new opportunities for sustainable growth. More than a reflection of where the sector is today, No Waiting Room is designed to help the profession prepare for what comes next, and to equip forward-thinking practices with the knowledge and confidence to lead the future of UK dentistry.

"The dental sector is at a pivotal moment. Patient expectations are evolving faster than ever, influenced by wider consumer trends, advances in technology and changing attitudes towards healthcare. We commissioned No Waiting Room because we believe that understanding these shifts is essential for every dental practice looking to thrive in the years ahead.

Too often, business decisions are based on historical performance rather than anticipating future demand. By partnering with Working the Future, we wanted to develop an evidence-based view of how patient expectations are changing, what will matter most to patients in the future, and how practices can respond strategically.

Our ambition is for this white paper to give practice owners and leaders the insight and confidence to make informed decisions that enhance the patient experience, strengthen commercial performance and support sustainable growth across UK dentistry."



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