

What are the key drivers of change in the international teledentistry market?



The teledentistry market is starting to build critical mass - with the US and Europe in the lead.

Our client's goal was to understand where they might find the most compelling opportunities to pursue.

Technologies

- Macrotrend and market analysis
- Strategy
- Value chain analysis
- Remote monitoring medical devices
- Cloud platforms and AI

Domain expertise

- Telehealth
- Dentistry
- D2C business models



Our client asked:

The fastest growing sector is direct-to-consumer (D2C) aligners, where companies such as Smile Direct Club have significantly disrupted the established orthodontics market.

Health-oriented use cases are following, but have been constrained by the practical limitations of remote monitoring for diagnosis and treatment of patient conditions.

As the landscape shifts, corporate activity is increasing. Our client asked us to help them navigate these changes.

The project story:

We analysed the key drivers of / obstacles to growth – including readiness of healthcare practitioners, consumer attitudes, technology developments, regulatory frameworks and economic incentives – across five regions.

We segmented the market into four categories: D2C aligners, teledentistry platforms, software and AI providers, and hardware companies.

We analysed leading players in each segment, identified critical success factors and assessed their prospects for growth.

Results: deliverables and outcomes

Our work added significantly to our client's understanding of the entire teledentistry ecosystem – capturing the levels of development in the US, Europe, China, India and Latin America.

Our structured approach gave them a framework within which to assess potential organic, partnership or M&A opportunities.

Our work also gave them fresh insights into strategies being deployed by direct competitors, new entrants and players in adjacent sectors.

The outputs from our work were used to inform investment decisions made the client's senior executive team.

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