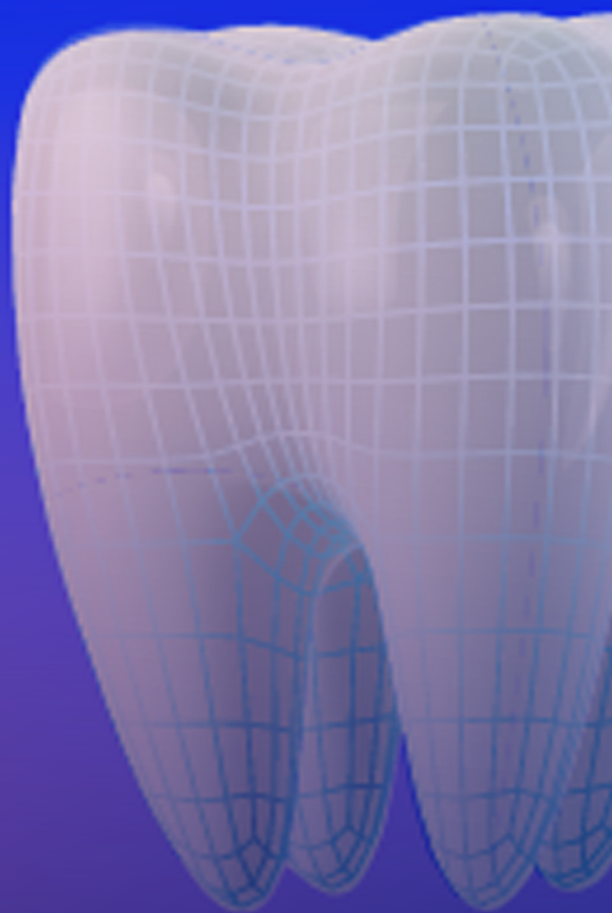




2025 Dental Industry Outlook

Discover the trends, technology, and
insights driving practice growth.



Thank you
to these
contributors



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2025 State of the Dental Industry

The dental industry is undergoing a major shift, driven by new technology, changing patient expectations, and economic factors. This report looks at the biggest trends shaping dental care, from AI-based diagnostics and automation to predictions about mergers and acquisitions.

Thought leaders from across the industry share their insights, including:

- + DSO leaders
- + Clinicians
- + Staffing experts
- + Merger and acquisition experts
- + Technology leaders
- + Cybersecurity specialists
- + Revenue cycle management experts
- + Demographic analysts

U.S. Dental Services Market

\$192.2 billion 2023

\$197.7 billion 2024

\$242.8 billion 2030
revenue forecast

3.3%
CAGR
2024-2030

Source: **Grand View Research**



Eric Giesecke
CEO, Planet DDS

Technology Trends Shaping the Dental Industry

What once seemed like the future of dentistry is now happening in real time, reshaping not just how care is delivered, but how dental businesses operate and grow.



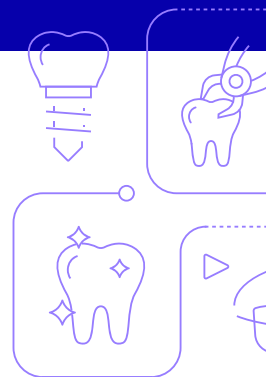
DSOs that stay ahead of these changes aren't just keeping up—they're setting the pace to maintain a competitive edge and deliver exceptional patient care. Five transformative technology trends that will define tomorrow are already knocking at our door. Let's dive in.

1 Evolving from Legacy Systems to Connected Platforms

The once-dominant server-based practice management systems are now showing their age, with challenges like data silos and limited scalability impeding growth. "All-in-one" solutions are giving way to flexible, integrated platforms such as DentalOS™ that utilize robust APIs, enabling seamless interoperability, real-time data sharing, and unified workflows. These modern systems streamline multi-location operations and free up staff from administrative bottlenecks, setting the stage for scalable growth.

2 Revolutionizing Revenue Cycle Management (RCM) with Automation

Revenue cycle management is undergoing a transformation thanks to automation and advanced integrations. APIs now enable automatic insurance verification, claims validation, and streamlined payment posting, reducing errors and manual workload. In 2025, these advancements will further optimize financial workflows, ensuring faster reimbursement cycles and enhancing practice profitability.



3 Leveraging AI to Drive Operational and Clinical Efficiency

AI technology is becoming a cornerstone of dental operations, offering solutions beyond diagnostics and treatment planning to appointment scheduling and insurance verification. By analyzing patient data, machine learning, and predictive analytics, teams can better anticipate patient needs to identify at-risk cancellations, optimize resource allocation, and assist clinicians in delivering more personalized care. These tools empower dental teams to focus on higher-value activities and improve patient outcomes.

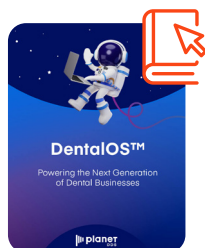
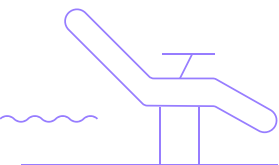
4 Transforming the Patient Experience Through Digital Innovation

Patients increasingly demand convenience and transparency in their dental care. DSOs are responding by digitizing the patient journey—from online appointment scheduling to two-way texting and digital payment solutions. By meeting these expectations, DSOs can enhance patient satisfaction and loyalty while streamlining operations.

5 Leveraging Technology to Bolster Data Security and Compliance

As DSOs continue their digital transformation, technology plays a crucial role in strengthening data security. In addition to education on best practices to safeguard patient information, DSOs can leverage advanced cybersecurity tools, streamline risk management, and stay ahead of evolving privacy regulations. By integrating these technologies, DSOs can not only reduce vulnerabilities against cybersecurity threats and data breaches but also build greater trust with patients.

The dental industry is shifting from tradition to transformation, rewriting the rules in patient care and business operations. DSOs that embrace smarter, more connected systems will break down operational barriers, unlock the potential of their teams, and deliver patient experiences that foster lasting loyalty and trust. The real question isn't whether change will happen; it's who will be prepared to lead it.



For more information on how dental operating systems are revolutionizing the industry, download the e-book:
Dental OS™: Powering the Next Generation of Dental Businesses



Planet DDS is a leading provider of cloud-based solutions, empowering growth-minded dental businesses with a comprehensive platform that includes Denticon, Cloud 9 Ortho, and Apteryx Imaging, delivering seamless integrations, improved workflows, and scalable technology.











Same-Store Growth Trends

Despite an uncertain economy, a Planet DDS analysis of more than 2,200 practices on Denticon showed about 60% achieved same-store growth in production from 2023 to 2024.

Average Same-Store Growth Year Over Year
across 2,200 practice locations

Q1 2024	Q2 2024	Q3 2024	Q4 2024
2.5%	3.2%	5.5%	4.6%

Top Tips to Increase Same-Store Growth

-  **Schedule new patients within five days**
-  **Expand hours, services, or staff to expand capacity**
-  **Reduce outside referrals**
-  **Provide more same-day care**
-  **Fill scheduling gaps with Denticon QuickFill or a similar tool**
-  **Add digital workflows including 3D printing**
-  **Leverage AI for X-ray analysis to increase case acceptance**
-  **Standardize SRP protocols**
-  **Reduce claim rejections with Denticon Claims Task Manager**
-  **Send text-to-pay reminders with link to online payment portal**



For more information on how to increase revenue, download:
[18 Tips to Increase Same-Store Growth.](#)



The Morning Grind

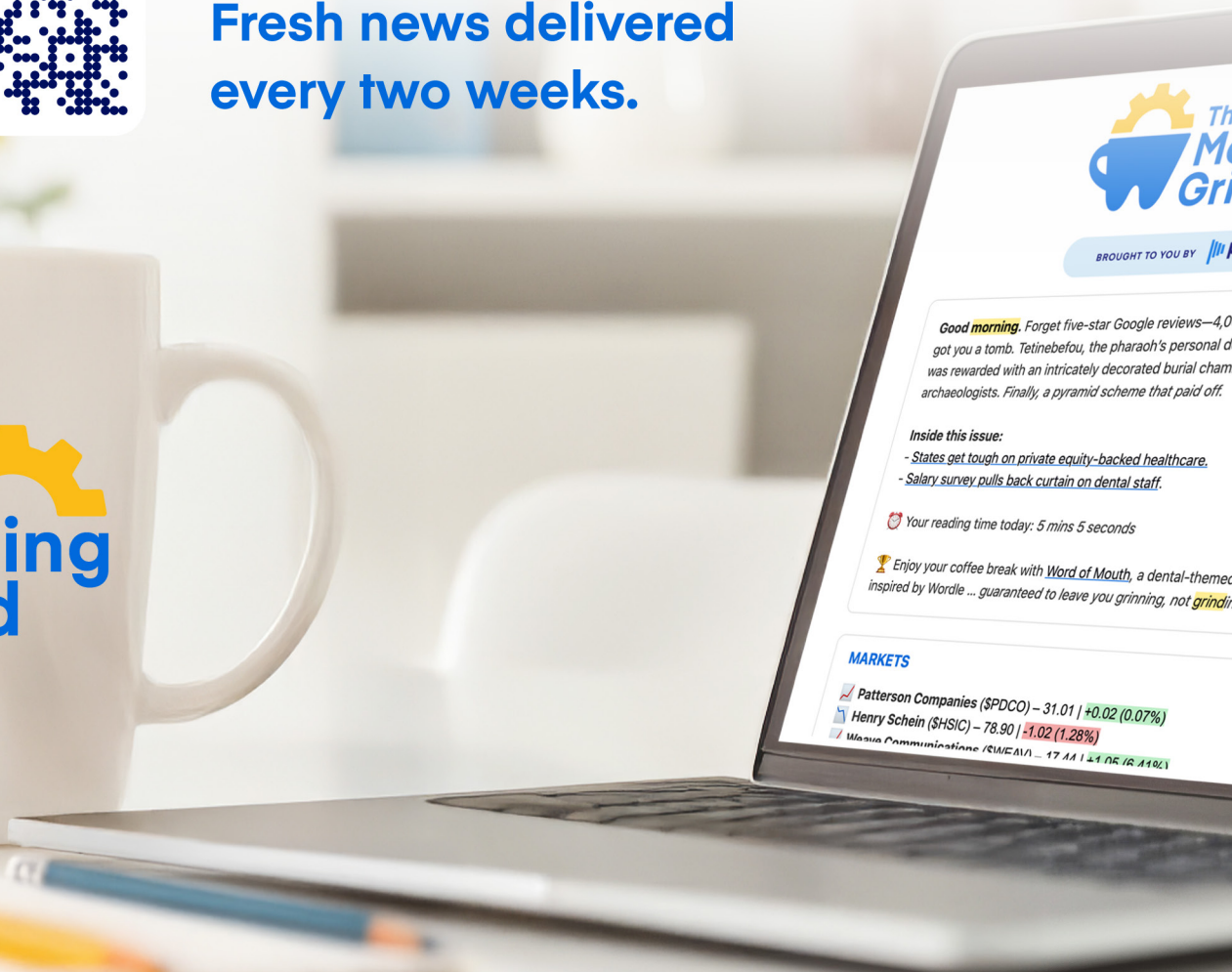
SCAN To Add
The Morning Grind To
Your Inbox For **FREE**



Join 9,000+ DSO leaders who get
the inside track on industry moves.

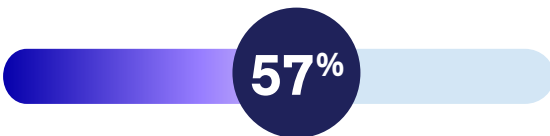
The must-read briefing on dental trends,
tech breakthroughs, and business insights.

Fresh news delivered
every two weeks.

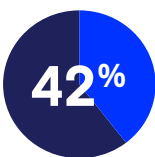


Diving into Data

Ever wonder how your practice compares against others? Here are the average benchmarks for common key performance indicators.



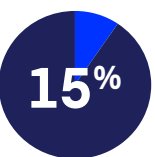
57% average **case acceptance rate** marked as accepted, scheduled, or completed



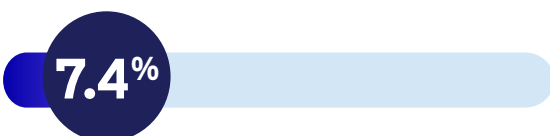
42% average **case completion rate** of patients treatment planned between 1/24 - 6/24 and who completed treatment by 12/24



43 average **new patients** per month per practice, including specialty

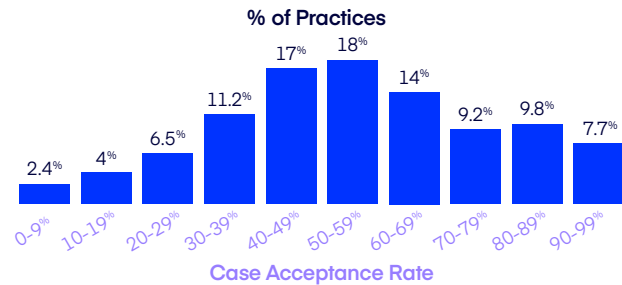


15.5% of patients **canceled an appointment** in advance



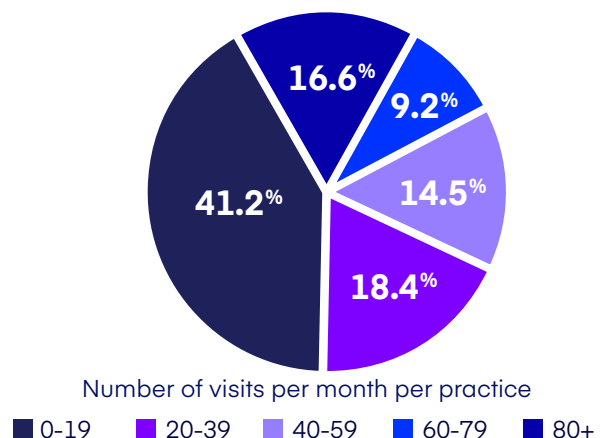
7.4% of patients **failed to show** for an appointment without prior notice

Case Acceptance Varies Widely by Practice

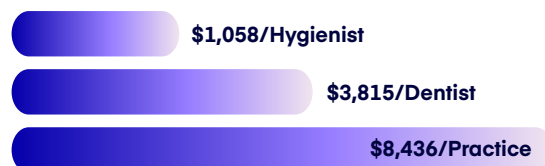


6 out of 10 average hygiene reappointment rate within 12 months

Number of New Patients Varies Widely



Average Gross Daily Production

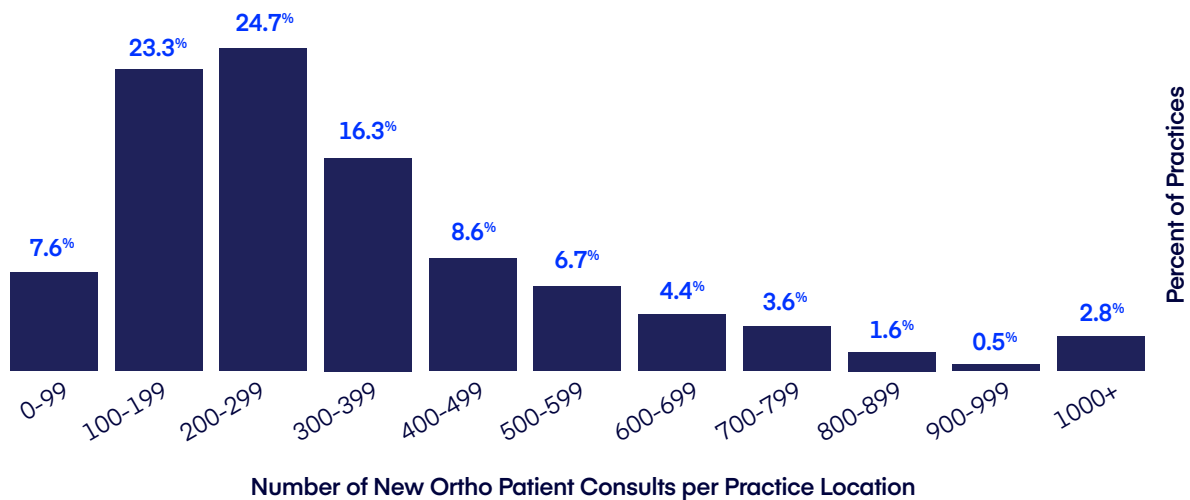


Source: Planet DDS analysis of more than 3,400 practices on Denticon includes general dentistry, specialty dentistry, emergency dental clinics, and mobile dentistry clinics. Individual practice results are influenced by their patient mix, provider mix, and payor mix.

Diving into Data: Orthodontics

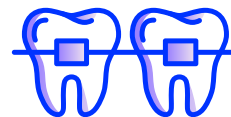
An analysis of more than 1,500 practices on Cloud 9 orthodontic practice management software revealed the number of new orthodontic patients varied widely by practice in 2024.

Number of New Ortho Patient Consults per Practice Location (2024)

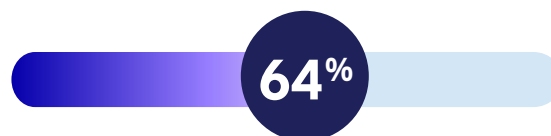


315.8 new ortho patient exams
per practice on average

203.5 ortho starts
per practice on average



64.4% average case
acceptance rate





Brian Colao
Director, Dykema DSO
Industry Group

Adjusting to Changing Conditions in the Dental M&A Markets

The dental practice mergers and acquisitions (M&A) market is undergoing a significant recalibration, transitioning from an era of nearly zero-cost capital to high interest rates to slowly improving rates.



Current economic conditions reshaped the landscape for practice sellers, and their expectations likely need to adjust accordingly.

At the end of 2024, the [Federal Reserve](#) lowered interest rates three times, which provided some relief to the market and the incoming presidential administration has injected a newfound confidence into the marketplace. However, the Fed has signaled a more cautious approach in 2025, with only two rate cuts forecasted. Meanwhile, inflation remains above 2% as we start the year and may even rise again, adding to financial pressures and limiting the opportunity to lower interest rates.

Since 2022, these conditions placed many DSOs in a challenging position as they watched the cost of their credit facilities skyrocket in a short period of time. Many DSOs continue to grapple with higher financing costs, which limits their opportunity to grow through M&A. As a result of the slowly improving conditions, smaller and mid-sized deals may be completed with some regularity in the first half of 2025, but most larger transactions will likely be delayed until the third or fourth quarter, or even later.

30%

**Dental market
consolidation
in 2024**

Significant Shift in Deal Structures

There has been a significant increase in more nuanced deal structures like earnouts, higher-percentage rollovers, and joint ventures. This allows buyers to shift some of the risk back to the seller rather than assuming all or most of the future performance risk post-closing.

Joint ventures allow the buyer and the seller to partner post-closing (such as a 51% / 49% split) and share the risks and the rewards of the practice's post-closing performance. Earnouts allow the seller to receive additional purchase price amounts if certain financial benchmarks are achieved post-closing.

Strong Focus on Same-Store Growth and Innovation

This period of adjustment is an opportunity for sellers to strengthen their operations, adopt innovative technologies, and focus on same-store growth.

“

In 2025, we'll see even greater adoption of automated revenue cycle management (RCM) tools, including dental benefits verification and payment processing; automated patient communication and retention tools; automated expense reporting tools; and AI for diagnostic accuracy and operational efficiency.

The groups that show resiliency and growth even during these challenging economic times will be well-positioned for a recapitalization event in 2025.

75%-80%

Predicted consolidation by 2040

Brian Colao, Dykema DSO Industry Group



For more information on dental mergers and acquisitions, download the e-book :
DSO M&A 101

Dykema

LEADING LAW FIRM IN DENTAL SERVICES™

The Dykema DSO Industry Group is a leading law firm for the DSO industry and dental services. It provides comprehensive counsel and experienced representation on a wide array of legal matters impacting DSOs, DSO investors, and other organizations within the DSO industry.



Kevin Cumbus
President, TUSK
Practice Sales

Predicting the Best Year in M&A Since 2022



EBITDA

EBITDA stands for Earnings Before Interest, Taxes, Depreciation, and Amortization. It serves as the fundamental metric in assessing a dental practice's financial health and valuation. It provides a clear picture of operational profitability by excluding non-operational expenses, which allows for a more accurate comparison across practices. In the context of dental mergers and acquisitions (M&A), pricing is determined by the valuation multiple applied to the practice's EBITDA.

The post-COVID period sparked an unprecedented rush to deploy capital, making 2021 the most intense year for Dental M&A to date. Before COVID, dental groups typically traded at EBITDA multiples in the 6x to 10x range, according to our analysis. By mid 2022, those multiples had surged to 8x to 12x, driven by an aggressive influx of private equity groups and private equity-backed DSOs. When demand goes up, prices follow.

However, by early 2023, rising inflation and the Federal Reserve's aggressive interest rate hikes delivered a significant blow to the industry, hampering DSO cash flow. Many groups found themselves in technical breach of loan covenants, forcing them to pause acquisitions while addressing EBITDA margin compression and waiting for interest rates to stabilize.



Numerous dental groups reduced or eliminated their business development teams, shifting their focus to same-store growth. Many turned to technology to streamline operations, reduce costs, and improve efficiency.

When the Downturn Began

With many traditional buyers putting their pencils down in 2023, TUSK worked hard to identify new pools of capital and emerging DSOs willing and able to buy or partner with our clients. Multiples softened slightly, and deal structures began to shift, leaning more toward equity roll and less cash at close.

5%
in EBITDA
erosion
since 2022

What We Saw in 2024

By 2024, smaller transactions were well received by the buy-side, while larger groups experienced mixed results. Groups with year-over-year EBITDA growth attracted strong interest, but those experiencing declines required a special buyer to recognize their potential.

DSOs
hiring business
development
teams

We also observed a widening spread in enterprise value (EV) offers, with some DSOs putting forth opportunistic bids, hoping sellers would accept. While we remained hyper-efficient in closing deals, we also encountered a few bad actors proposing deals far too favorable to buyers.

Despite the challenges, 2024 was TUSK's busiest year yet. We closed more deals in 2024 than in any year since opening our doors. It was hard-fought, but we could not be prouder of our team and the outcomes we delivered for our clients.

Predicts
robust
M&A activity
in 2025

Source: TUSK Practice Sales

Looking Ahead to 2025

Looking ahead, 2025 has the potential to be the best year since 2022. After extensive conversations with CEOs and DSOs, there is a shared sense of relief and optimism now that the election is behind us and the Fed has started lowering rates.

Based on these discussions, **we anticipate the strongest demand will be for practices and groups with EBITDA in the \$1 million to \$5 million range.** While there will continue to be appetite for sub \$1 million EBITDA deals at 2024 levels, the most significant gains in valuation will come for practices exceeding \$1 million in EBITDA.



TUSK Practice Sales is an industry-leading healthcare M&A advisory firm offering expert guidance on selling healthcare practices.



Mike White
Principal, CLA (Clifton
Larson Allen LLP)

The Dental Industry Is Optimistic About 2025

Last year was challenging for the dental industry—particularly in the M&A and transaction space where deal volume fell compared to prior years.

Many in the market adopted a “wait-and-see” approach, driven by a combination of compressed valuations and a disconnect between sellers’ price expectations and buyers’ willingness to pay historical market valuations.

Interest rates played a key role in shaping this environment, but broader factors were also at play. The cost of capital investment—much of it borrowed—forced investors to get creative with deal structures. We saw an increase in seller carry-back notes, bonus performance incentives, and deals with less cash upfront as traditional lenders became more cautious about financing.

Private equity groups already operating in the dental market focused on “getting their house in order.”



Overstaffing for growth in prior years led many to reduce team sizes and shift their attention toward operational efficiency.

In some cases, these private equity groups also determined starting a new practice was more cost-effective than acquiring an existing one, a notable pivot from traditional acquisition strategies. This shift also emphasized the adoption of technology. AI and automation were increasingly used to streamline operations, replace redundant functions, and improve patient outcomes.

Strategic Investment and Growth in the DSO Market

Despite the challenges of 2024, the industry remains optimistic about 2025. Many speculate how consolidated or affiliated the market is today, but we believe there is still ample room for growth in the dental service organization (DSO) space.

Additionally, new solo start-ups and small group practices emerging regularly signals a long runway of opportunity for the industry's future. The closure of a few key transactions in late 2024, including MB2 Dental's recapitalization and Comvest Private Equity's investment in Riccobene Associates Family Dentistry, is likely to reset market valuations, sparking renewed activity in the months ahead.

We anticipate a flurry of transactions in 2025, fueled by pent-up demand, underutilized capital, and a renewed focus on strategic investments. Practices will likely continue to prioritize operational improvements, leveraging AI and other tools to enhance efficiency and patient experiences.

Preparing Financials for Future Opportunities

For practice owners, this is a prime time to make sure their financials tell the right story — whether preparing for an exit, seeking financing, or bringing on a partner. Strong financial reporting and strategic positioning are essential to capturing the opportunities the new year will bring.

Leverage AI
and other tools to
enhance efficiency
and patient
experiences



CLA exists to create opportunities for our clients, our people, and our communities through our industry-focused advisory, digital, audit, tax, and outsourcing services.



Jon Fidler
Founder, Fidler & Associates

Dental Staffing Trends Are Improving



After two years of DSO restructuring and layoffs, we see the momentum shifting.

We're noticing an increase in demand for CFOs and business development roles, which points to companies anticipating more merger and acquisition (M&A) activity this year. We're also seeing a lot of opportunities for experts in revenue cycle management (RCM) and credentialing, which help with same-store growth and efficient operations.

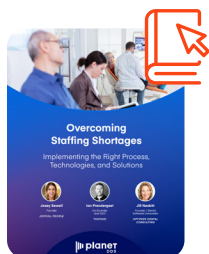
What Employers Are Looking For

Many hiring companies are very specific with their requirements. The majority want candidates to be local, not remote. Before 2022, companies were seeking candidates who could work in a chaotic, high-growth environment. Now, companies are focused on candidates who value structure and have experience with tightening up production.

Salary Trend for Managers

When we look at job offers from 2020 to 2024, we're seeing a drop of 8% to 12% in base salary offerings for mid-level managers, with an increase in bonus opportunities based on performance. We're also seeing offers that include reimbursement for continuing education and an increase in paid time off days.

C-suite roles have seen an increase in their base salary of 6% to 10% and enhanced benefits packages, including stock options or equity in the organization. Equity compensation grew by approximately 10% to 15% from 2020 to 2024 as organizations sought to retain and attract top talent.



For more information on hiring and retention strategies, download the e-book: **Overcoming Staffing Shortages**.



Fidler & Associates provides executive search services for multi-site dental and healthcare groups.



Rod Ganjifard
Former Vice President of
Technology, Onsite Dental

Shaping the Future of Enterprise Dentistry

With advancements in system integrations, innovative applications of artificial intelligence (AI) and an increased emphasis on cybersecurity, dental support organizations (DSOs) are poised to deliver more efficient, high-quality care while addressing modern challenges in 2025.



These trends represent both opportunities and critical shifts for DSOs aiming to scale and standardize their operations.

Integration Between Practice Management Systems and Third-Party Solutions

Seamless integration between practice management systems (PMS) and third-party tools are revolutionizing operational efficiency. Platforms like the cloud-based DentalOS™ supported by Planet DDS are at the forefront, establishing PMS as the central hub for all operational activities and enabling real-time communication with scheduling, billing, and patient engagement solutions.

This elevated level of integration is transforming DSOs by:

- **Customizing workflows:** APIs empower practices to tailor workflows to their specific needs, breaking down operational silos and improving data accuracy.
- **Streamlining administrative tasks:** Integrated systems reduce manual processes, allowing staff to focus more on patient care and less on logistical hurdles.

By adopting these interconnected systems, DSOs are creating a smarter, more cohesive ecosystem for practices as they manage patient care and operations.



Seamless integration between practice management systems (PMS) and third-party tools are revolutionizing operational efficiency.

AI and Automation: Redefining Efficiency and Care

Artificial intelligence (AI) is solidifying its role as an essential tool across both clinical and administrative domains, reshaping the way clinicians and staff operate.

Clinical breakthroughs include:

- **Improved diagnostics:** AI continues to refine its capabilities, offering faster and more accurate interpretation of radiographs and patient records to assist clinicians with their decision-making.
- **Streamlined documentation:** Automated tools such as voice-to-text applications for clinical notetaking are eliminating the need for manual documentation, enabling clinicians to dedicate more time to patient care.

Administrative AI applications include:

- **Virtual assistants:** AI-powered chatbots facilitate personalized patient interactions, handling tasks like scheduling, reminders, and follow-ups efficiently.
- **Predictive analytics:** By integrating AI into PMS platforms, practices gain actionable insights into performance metrics and patient trends, enabling proactive decision-making and streamlined operations.

AI adoption is transforming DSOs into data-driven, patient-centered organizations, delivering unparalleled care and operational efficiency.

Cybersecurity: A Non-Negotiable Priority

Cybersecurity is no longer optional—it's a foundational element of trust and operational stability. DSOs are adopting robust measures to safeguard sensitive patient information and protect against cyber threats.

Key strategies include:

- **Proactive threat detection:** AI-driven security systems monitor networks in real-time, identifying and neutralizing potential threats before they escalate.
- **Building a security-first culture:** Ongoing training equips dental teams to recognize and counter emerging threats, such as phishing scams, while ensuring secure handling of patient data.

Embedding cybersecurity into daily operations protects patient trust and ensures uninterrupted functionality.

A New Era of Dentistry

As the dental industry moves forward, DSOs that invest in tighter integrations, embrace AI advancements, and prioritize cybersecurity will emerge as leaders in the field. These converging trends mark the beginning of a new era, one defined by innovation, resilience, and the ability to meet evolving patient expectations.



As the dental industry moves forward, DSOs that invest in tighter integrations, embrace AI advancements, and prioritize cybersecurity will emerge as leaders in the field.

onsite^{dental}

Onsite Dental provides sophisticated mobile dentistry services, traditional fixed-site dental care, and self-contained pop-up dental practices to workplaces, college campuses, and residential high-rise buildings to deliver care that is comfortable and convenient.



Seth A. Gibree

DMD, FAGD, Senior Director of Clinical
AI and Innovation, Heartland Dental

Advancing Dentistry: Practical Insights from a Senior Clinical Leader



As the largest dental support organization in the U.S., Heartland Dental is uniquely positioned to lead the charge in transforming dentistry through innovation and patient-centered care. From the transformative integration of artificial intelligence (AI) to reimagining insurance claims processes, we are committed to helping supported doctors navigate advancements that redefine care delivery at scale, drawing on our rich history of technological integration.

Managing Change at Enterprise Scale

Introducing new technologies across our vast network—which includes over 3,000 supported doctors and 6,000 supported hygienists—requires strategic planning, collaboration, and input from interdisciplinary teams comprised of clinicians, business leaders, and technology experts. Our approach, honed through years of innovation, includes comprehensive proof-of-concept trials and multiple pilot phases to assess effectiveness and integration potential.

For example, we spent over four years rigorously testing multiple clinical AI tools, followed by an additional two years of staged pilot programs before choosing VideaHealth as an AI partner and fully deploying them across our network. This measured approach ensures the technology delivers measurable value, integrates seamlessly into workflows, and gains the confidence of our supported clinicians.

In 2025, our initiatives include deploying advanced business tools, enhancing mentoring and educational resources for providers, and integrating cutting-edge AI imaging solutions.

These efforts aim to further improve patient outcomes, operational efficiency, and the overall care experience while maintaining clinician autonomy.

Artificial Intelligence: Practical Applications in Diagnostics and Efficiency

AI continues to revolutionize dentistry by boosting diagnostic precision and streamlining operations. Radiographic AI tools enhance clinicians' ability to detect subtle anomalies, enabling earlier interventions for conditions like caries, periodontal disease, and oral cancer. In our supported network, AI-assisted diagnostics have resulted in a 20%+ improvement in patient case acceptance, underscoring the tangible impact of this technology on patient trust and treatment adoption.

AI-assisted diagnostics
have resulted in
20%
improvement in patient
case acceptance

Beyond diagnostics, AI is also transforming clinician development by supporting personalized mentoring and education. Data-driven insights enable tailored mentor-mentee pairings, while AI-powered simulations and virtual reality provide hands-on experience, enhancing clinical skills without requiring live patients. These advancements reflect AI's ability to address both operational and clinical needs.

Additional AI-driven tools—such as automated scheduling, voice charting, and predictive analytics—significantly reduce administrative workloads. This allows dental teams to focus more on patient care while improving practice efficiency. However, realizing AI's full potential requires careful implementation. Transparent communication, robust safeguards, and clinician autonomy are essential to building trust and ensuring the technology serves as a support tool rather than a replacement for human expertise.

Streamlining the Insurance Adjudication Process

Navigating the complexities of dental insurance remains one of the industry's most time-intensive and frustrating challenges. Inconsistent claim handling and unnecessary denials not only delay care but also place additional burdens on dental teams.

For instance, an X-ray missing a portion of a root can lead to claim denials, requiring costly and time-consuming resubmissions. Addressing these inefficiencies begins with enhancing transparency, ensuring consistency, and keeping clinicians central to decisions about medical necessity.

Heartland Dental's 2025 vision includes leveraging AI to automate patient insurance verification, support "clean" claims processes, improve accuracy, and predict potential denials before submission. By automating routine tasks and reducing administrative friction, we aim to ensure that more time is spent focusing on patient care.

Introducing Innovative Care and Workforce Solutions

Innovation is at the heart of Heartland Dental's mission to support doctors and their teams as they deliver the highest quality dental care and experiences to the communities they serve, by assisting in supporting patient care improvement and increasing operational efficiency. Two recent initiatives illustrate our commitment to practical, scalable solutions:

- **Curodont Repair Fluoride Plus:** This groundbreaking treatment regenerates enamel and reverses incipient carious lesions through a biomimetic process, providing patients with a minimally invasive and effective solution to early-stage decay.
- **Hygienist and Dental Assistant Staffing Program:** This initiative is evolving to not only address workforce demands but also serve as a platform for ongoing education and skill enhancement. Hygienists and dental assistants can grow professionally while contributing to operational success during high-demand periods.

These programs highlight our focus on addressing the real-world challenges faced by both providers and patients.

A Focus on Practical Benefits

The adoption of new technology in dentistry should deliver clear, measurable benefits. From AI-enhanced diagnostics to streamlined insurance workflows and innovative workforce solutions, every advancement must prioritize improving the experiences of patients, supported providers, and their practices.

As we integrate cutting-edge technology, our focus remains on balancing innovation with the human touch. By fostering continuous, personalized learning through AI, we aim to create a culture of excellence that directly enhances patient care. By thoughtfully integrating new tools and emphasizing measurable outcomes, everyone at Heartland Dental remains committed to supporting clinicians in delivering exceptional care while shaping the future of dentistry.



Heartland Dental is the nation's largest dental support organization, providing non-clinical administrative support services. What started from the entrepreneurial spirit of Rick Workman, DMD, with his single dental practice, has evolved into affiliating with over 3,000 doctors in over 1,800 locations across 39 states and the District of Columbia. The company is majority owned by KKR, a leading global investment firm. For additional information, please visit heartland.com.



Lorri Detrick
President and COO,
Riccobene Associates
Family Dentistry

Combining Culture and Operations to Drive Success

There's a renewed sense of optimism in the dental industry. Economic relief appears to be coming, and patients are likely to have more discretionary spending for their oral health.



Enhanced Employee Loyalty and Engagement

We're seeing positive changes in staffing. The hygiene market has become more stable and creative solutions such as assisted hygiene programs are working well. The era of work-from-home has subsided, and employees are rediscovering the value of being part of an in-office team. At Riccobene, we've worked hard to foster employee loyalty, and our low turnover rate reflects that effort.

In 2025, we're rolling out Nectar HR, an employee recognition platform that consolidates rewards and recognition into one seamless system. Employees can earn points for prizes like gift cards or swag, offering a sense of ownership in how they feel appreciated.

Leveraging Technology for Efficiency and Patient Experience

Technology is evolving quickly, and we're focused on maximizing efficiency and elevating the patient experience. We're introducing more ways to enhance revenue cycle management (RCM) through partners who are using artificial intelligence and automation. We're also prioritizing patient communication, integrating AI engines for automated missed-call responses, online appointment scheduling, and more ways to streamline the patient experience.

We're actively consolidating our systems to operate on a platform, working with vendors to ensure APIs interact seamlessly with our practice management system. We're exploring tools that help us mine data for patient reactivation and outreach.

Navigating Reimbursement and Procurement Challenges

Managing payer relationships remains a priority as we negotiate fair reimbursement rates that align with rising operational costs. We're also maximizing tools like Dentira to get the best value for supplies, balancing price, quality, and vendor relationships.

Consolidation and Expansion in the Market

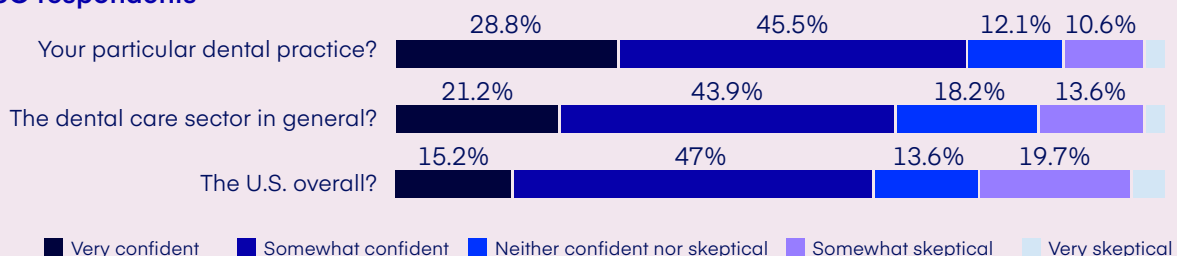
It will be interesting to see what happens in the dental M&A market this year. Riccobene completed one of the few major transactions in 2024, recapitalizing with a new private equity partner. This partnership positions us well to expand our presence in the Southeast and explore opportunities in new states, with an eye on doubling our size.

Our growth will be fueled by innovation and an unwavering commitment to patient care.

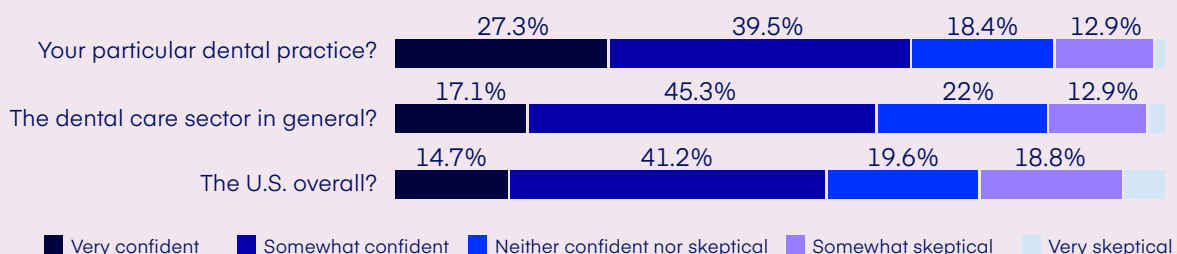
Survey conducted by ADA Health Policy Institute, 4th Quarter, 2024

Looking ahead the next six months, how confident are you in the economic conditions:

DSO respondents



Non-DSO



Riccobene Associates Family Dentistry is a DSO that offers general dentistry and specialty services at more than 70 locations in North Carolina, South Carolina, and Virginia.



Sundeep Rawal
DMD, Senior Vice President of Implant
Support Services, Aspen Dental

Leading Change in Your Organization

There's so much that is changing in dentistry, and if you really think about being a leader in healthcare, there are a couple of things that people need to focus on: It's important to make a commitment to being an early adopter.



Technologies change and evolve quickly, as do other aspects of the industry. In the next few years, we're going to see changes in how we leverage data, artificial intelligence, diagnostic technology, manufacturing operations, and more.

Driving Innovation at Scale

To be an effective leader, you have to take the responsibility that you're going to be at the forefront of that change. We've already seen how AI improves diagnostics and treatment, but there's no doubt there's so much more to come that we can apply within our organization and across the industry in the upcoming years.

For example, what else could AI be applied to in the context of the patient experience, the clinical experience, or the team experience? Can we make scheduling easier? How can we create better environments for work-life balance? How do we think that we can diagnose and treatment plan more predictably to have better outcomes for patients?

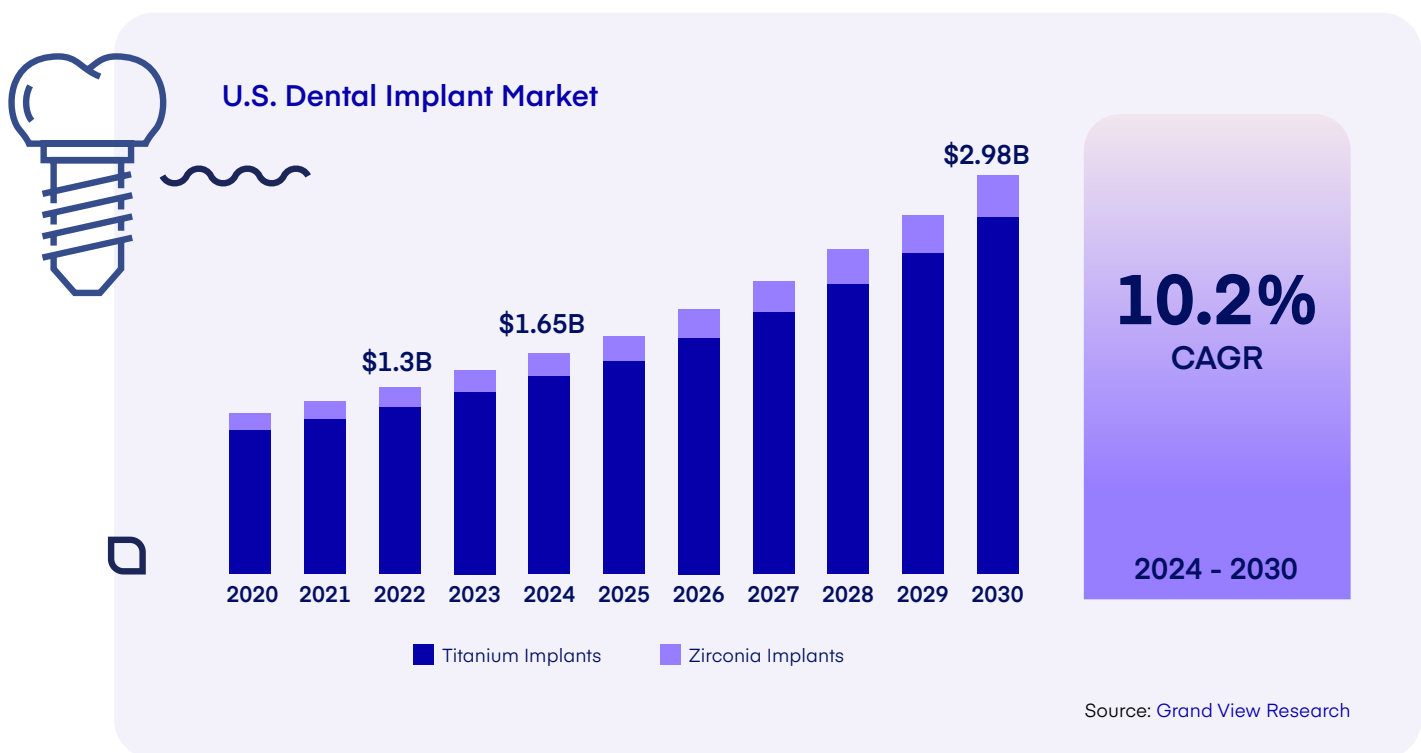
There's truly so much going on, and as that rate of change increases, so do patient expectations. As a dental support organization (DSO), we are uniquely positioned to have the resources and structure to drive innovation at scale and create change for the industry.

Innovations in Dental Implant Therapy

I'm the most energized about dental implant therapy and the trajectory it has to change how we deliver dental care to the patients that Aspen Dental serves. In the past few decades, going back twenty or thirty years, there hasn't been much of a shift in how we've thought about tooth replacement as implant dentistry was for a select few who could afford costly treatments—until now.

Innovations in dental implant therapies are changing the trajectory of what we as clinicians are able to offer patients. Dentures have long been the go-to solution for people with tooth loss who were not able to afford complex yet meaningful treatment solutions, and therefore for a long time were the best we could offer. Technology has changed that, especially when utilizing dental implants.

Today, we have a superior solution for patients—affordable dental implants in conjunction with premium prosthetic solutions that look like natural dentition, but more importantly, function like natural dentition. Patients can eat a wider variety of foods, they're at less of a risk for bone loss, and so much more.



Increasing Access to Care

This is also a priority as expanding access to care has always been Aspen Dental's mission, and the developments we're making with implant therapy through innovation and technology are going to continue to fuel that mission.

Through technology and innovation, we're able to make certain processes easier, take less time, and make implant therapy more affordable. Historically, there have been many barriers for patients seeking dental implant therapy. They feel out of reach due to cost, the time it takes to heal, or fear of a lengthy procedure.

The work we're doing focuses on breaking down these barriers patients face by providing a simple, reliable, and more accessible offering that's easy for a patient to say "yes." We've had the most wonderful experience doing this over the last few years, and we're even more excited about what 2025 holds for the future of implant therapy at Aspen Dental.

TAG Oral Care Center for Excellence

One of the greatest honors I've had in my career is to help spearhead the TAG Oral Care Center for Excellence (OCC). It's the greatest example of our level of investment and commitment to changing how implant dentistry is delivered to patients.

While we formally opened the OCC in 2022, we've continued to build on the multi-day, contemporary implant training we offer to Aspen Dental clinicians in 2024. It's been a hub for both innovation and collaboration, while serving residents in and around Chicago who wouldn't have access to quality care otherwise.

To date, we've donated upwards of \$10 million in free care while placing thousands of dental implants for those patients who need tooth replacement. It's been a privilege to be part of something so impactful that changes not only the trajectory and careers of doctors we support, but also the patients who need us the most, and the patients the doctors we educate will go on to serve.



The Aspen Group (TAG) supports more than 1,400 locations in 46 states through its five consumer healthcare brands: Aspen Dental, ClearChoice Dental Implant Centers, WellNow Urgent Care, Chapter Aesthetic Studio and Lovet Pet Health (formerly AZPetVet).



Emmet Scott
Partner, Dentist
Entrepreneur Organization

2025 Keywords: Discipline, Focus, and Innovation

At the Dentist Entrepreneur Organization (DEO), we work with more than 300 dental group owners representing over \$3 billion in revenue. Our members are navigating one of the most challenging yet opportunistic times in the industry, where growth and profitability require sharp focus, disciplined systems, and a willingness to innovate.

The Profitability Pivot

Margins are under a microscope. Here's an example: Post-pandemic supply costs climbed between 7% to 10% of revenue, and lab fees ran 10% to 13%. Today, we're helping members cut those numbers deeply—supply costs are down as low as 4%, lab fees slashed.

How? Relentless management and a mindset shift. For example, some groups are moving hygienists from just hourly pay with an arbitrary bonus to a percentage of hygiene-driven collections greater than their hourly compensation. Everyone's goals are tied to performance metrics that drive profitability. It's not just about cost-cutting; it's about aligning incentives.

Even staffing decisions are formula-driven now. Does a doctor need another dental assistant? There's a specific calculation for how much extra production justifies the hire. Everything is systematic, intentional, and built to scale.

Revenue Cycle Reboot

Gone are the days of staring at monthly collections versus production reports like they're the holy grail. The focus has shifted to collections by date of service and aggressive follow-up on the unpaid difference. It's about tightening up the processes and leaving no dollars behind.

The AI Revolution in Dentistry

AI is no longer just hype—it's becoming a must-have. X-ray analysis powered by AI is on the verge of being standard equipment, not an optional upgrade. Marketing technology is also stepping up, with tools that actually track attribution rates and return on investment (ROI), giving practice owners real data to act on. Phone systems that make or answer calls are on their way. The tech revolution has already begun.

The New Playbook for 2025

Dentistry is evolving fast, and staying competitive means embracing change, adopting systems, and staying data driven. Whether you're scaling from a single location or refining a multi-practice empire, the playbook is the same: Tie every decision to metrics, leverage technology, and build systems that make your business unstoppable.

Four Stages of Dental Practice Growth

The dentists we coach fall into four distinct growth stages, each with specific priorities that need to be specifically addressed:

Builders

Revenue building is their primary issue. These practices are laser-focused on single practice growth, either by increasing patient flow or adding associates. Clinical capability is key.

Empire Builders

They've cracked the code. Their systems are dialed in and their focus is on fine-tuning: leveraging technology, increasing revenue per patient, and perfecting their strategy.

High Producers

These groups are booming with patient flow but feeling the strain on the team and facilities. They need operational support, leadership talent, and standardized processes to scale effectively. It's about fixing bottlenecks to launch additional growth.

Pathfinders

These are multi-location groups with inconsistent performance. Their focus is on implementing systems to optimize the underperforming practice. This is the "figure out the playbook" stage.



The Dentist Entrepreneur Organization (DEO) is a coaching and community platform designed to help dental practice owners achieve more time, more profit, and more impact.



Kerry Straine
CEO, Straine Dental Management

Getting Back to Basics



In some cases, it's back to basics for the dental industry. Investors are less interested in rack-and-stack EBITDA and instead are focusing on dental practices that can show organic same-store growth. The C-suite needs to have financial acumen and understand revenue cycle management strategies and expense management.

Key Performance Indicators

Everyone needs to be focused on their KPIs (key performance indicators). The KPI priorities are producing to goal, collecting all production, reappointing patients, achieving the clinical standards daily, operating the dental practice at capacity, managing overhead, and developing an outstanding team.

Staff Alignment

After years of increasing labor costs, wages are leveling off. Hygienist salaries went up 10% to 20% per hour, and that led us to look at how their responsibilities and production should increase to make the economics work.

Hygienist salaries
went up
10-20%
per hour

Many employers are eliminating work-from-home positions. We've brought all of our management back into the office, and it creates a better culture.

AI Technology

Top technology trends include AI for many areas of a dental practice. AI provides incredible insights, such as reviewing radiographs from past visits and identifying patients with potential treatment needs, which allows dentists to better plan their day.

Every practice needs to be tracking its phone calls and appointment requests. Call tracking and analysis tools can evaluate calls, identify missed opportunities, and provide coaching to improve team performance and recapture potential patients. Additionally, AI-powered communication platforms can be used to streamline appointment booking and answer patient questions via text and web chat.

Preparing for the Future

A successful DSO partnership often involves a commitment of five years or more from doctors. This commitment is typically rewarded with the opportunity to participate in the DSO's equity growth. Doctors should clarify the details of equity participation when exploring a DSO partnership.



STRAINE
DENTAL CONSULTING • ANALYTICS • MANAGEMENT

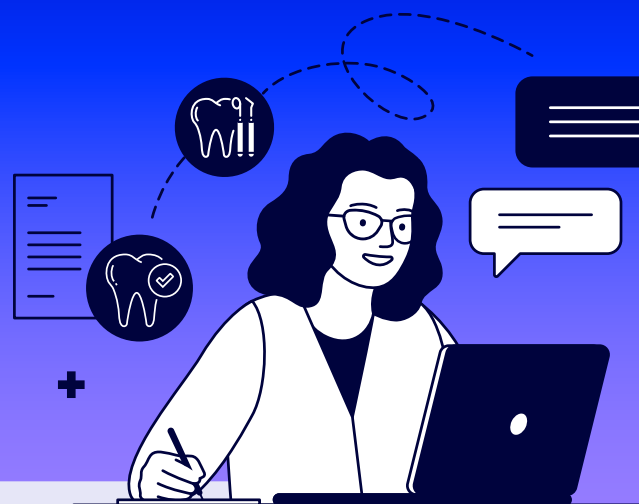
Straine Dental Management operates a DSO with 51 practices and provides consulting services to over 200 practices.



Jill Nesbitt
CEO, Optimize
Dental Consulting

Maximizing Software Investments in 2025

The top trends for 2025 will be investing in technology—and ensuring team members know how to use it effectively.



Dental support organizations (DSOs) are realizing the value of optimizing their practice management systems. Organizations recognize that relying on third-party analytics companies to bridge data from disparate systems doesn't allow for the successful execution of their operations model. Leaders want confidence in their reporting and a strong valuation in the marketplace.

Changing Expectations for Automation and Customization

The dental industry has lagged behind medical healthcare in terms of revenue cycle management (RCM) technology. Now DSOs demand increased automation, seamless API connectivity, and customizable tech stacks.

The concept of a DentalOS™ embraces the need for product-agnostic strategic leaders who can help DSOs achieve measurable outcomes in these ways:

- **Streamlining payment posting:** The Optimize team helped one DSO eliminate \$3,000 per month in outsourced help and cut fifteen hours of manual work per month by optimizing their insurance payment workflow. This translated into accurate, timely reporting, increased visibility into their data, and empowered leadership decision-making.
- **Scaling without additional staffing:** Optimize revamped workflows for a DSO revenue cycle management manager of four practices who thought she would need to hire two more people to help as the company scaled to six locations. The new workflows streamlined EFT and paper check posting and sending statements, saving the manager up to 50% of her time and eliminating the need to hire additional staff.

- **Ensuring accurate doctor compensation:** An improper workflow led to a \$100,000 gap in collections reporting, impacting the doctors' compensation. We identified the issue and created a standard operating procedure (SOP) for team members to follow, ensuring accurate payouts.

AI-Powered Call Centers Take Center Stage

Missed calls, particularly from new patients, are a revenue drain. AI-enabled call center software has illuminated this problem and offered solutions, driving investment in tools that capture missed opportunities and enhance revenue streams.

Embracing Technology for Growth

DSOs must embrace technology not just as a tool but as a strategy for growth. The trends we see in 2025 highlight an urgent need for expertise in dental tech and operations. DSOs need leaders who can bridge gaps, drive innovation, and achieve results.

28.4%

Owner dentists who made a major equipment purchase in 2024

27.7%

Owner dentists who invested in new software in 2024

Source: ADA Health Policy Institute



Optimize Dental Consulting provides technology project leadership to dental group practices to help evaluate, implement, train, and scale their tech stack.

Dental Gets Down to Business

Join Mike Huffaker and visionary leaders as they uncover ideas and trends transforming the dental industry.



STEVE BILT

CEO of Smile Brands
& OneSmile, LLC



BRIAN COLAO

Member & Director of
Dykema DSO Industry Group



DEE FISCHER

CEO of Fischer's
Professional Group



DR. SULMAN AHMED

Founder, Chairman, &
CEO of DECA Dental Group

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Dee Fischer
CEO, Fischer's
Professional Group

Aligning KPIs, Technology, and Talent

The dental industry is at a pivotal moment, one that requires leaders to rethink how they align their key performance indicators (KPIs), embrace new technologies, and staff strategically for growth. These factors will shape not only operational growth but also M&A activity, particularly for sellers with one to ten practices.

KPIs Must Evolve with Technology

Traditional KPIs alone no longer suffice in the current market. Metrics like production, collections, and new patient numbers must be aligned with the technology driving your operations. For example:

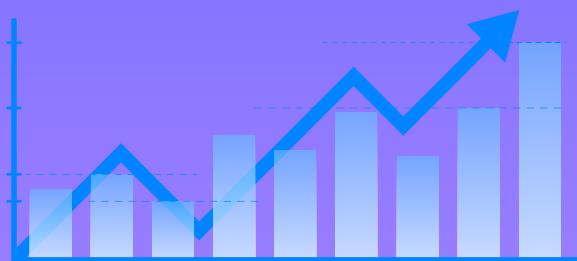
- **Revenue cycle management (RCM) automation:** KPIs should measure claim turnaround times and denial rates to ensure the automation is delivering on its promise.
- **Patient retention tools:** Engagement metrics such as patient recall rates and appointment follow-through should be tracked and evaluated.
- **AI for diagnostics:** Practices using AI for X-ray analysis should track case acceptance rates, time saved, and improved patient outcomes.

Staffing Trends: Hiring from Outside Dental

Another significant trend in the industry is hiring people from outside the dental field. Hiring jewelry store clerks, realtors, and other sales professionals for treatment coordinator positions can increase case acceptance because these personalities are very comfortable talking about money and value.

People coming from the hospitality industry often make great front-office employees, while bookkeepers, auditors, and medical coders may excel at insurance billing and revenue cycle management.

Integrating these non-dental professionals requires a strong onboarding process, clear communication, and a culture where industry newcomers feel supported as they adapt their skills to the unique demands of the dental industry.



Fischer's Professional Group is a dental consulting company focused on helping emerging dental groups and DSOs create systems, accountability, and exponential growth.



Paul Kaiser
CEO, DentalXChange



From Manual to Modern: Dental RCM Gets a Tech Boost

Dental revenue cycle management (RCM) has long been hampered by inefficiencies, forcing team members to spend countless hours navigating payor portals, making phone calls to confirm benefit eligibility, chasing down claims, and resolving insurance payment issues.

Now APIs are transforming the RCM process by automating key workflows including eligibility verification, claim processing, and insurance payment posting. For example, the XConnect Claims API enables practices to validate and submit claims with a [clean claim rate of 99%](#), without leaving the practice management system.

Reducing Errors and Saving Time

APIs enable different computer systems to exchange information without manual intervention. The XConnect Eligibility API gives fast access to details like deductibles, exclusions, copayments, limitations, and more. Traditionally, it might take a dental team member ten minutes or longer to verify a patient's eligibility for coverage. Now, it may take under a minute.

Expediting Payment Through Automation

For years, dental team members would reconcile insurance payments by manually entering the payment amount and details to the ledger, then depositing the payments in the bank. DentalXChange enables the 835 electronic remittance (ERA), which can automate much of the insurance payment entry and expedite bank deposits through electronic funds transfer (EFT), reducing the number of paper checks and chance for data entry errors.

The [Council for Affordable Quality Healthcare \(CAQH\)](#), a non-profit organization that works to streamline healthcare administration, reports dental providers can save two minutes per remittance advice by going electronic. It also reports that the dental industry could save more than \$246 million from switching from paper to electronic remittance advice processes.

\$246 million

saved by switching to electronic remittance

Modernizing the RCM Ecosystem

By modernizing the RCM ecosystem, dental practices are significantly reducing the amount of manual effort that had been necessary historically. New RCM technology will make the process even easier, from scanning the schedule and automatically verifying patient benefits to ensuring cleaner claim submissions and automating payment reconciliation. By using APIs, automation, and AI-assisted technology, dental team members will spend less time on time-consuming administrative tasks and more time taking care of patients.



+21 million
claims processed per month by
DentalXChange



+1 billion
transactions processed per year



92%
U.S. dental claims paid in less than
20 days



97%
U.S. dental claims paid in less than
30 days

Source: DentalXChange

dental Xchange

DentalXChange is an innovative revenue cycle management platform and insurance claim clearinghouse that supports more than 200,000 dental providers and connectivity to nearly 1,400 payer plans.



Ato Kasymov
CEO and Co-founder,
Zentist

Emerging Trends in RCM

The emerging trends shaping the future of dental revenue cycle management (RCM) emphasize speed, accuracy, and scalability.



As AI technologies evolve, DSOs that adopt intelligent automation will experience significant improvements in financial performance and operational resilience. Remit AI, for example, is at the forefront of this transformation, providing tools and insights that turn challenges into opportunities, enabling sustainable, scalable success.

Automation Takes Center Stage

AI-powered tools continue to reshape RCM by enabling faster claims processing and reducing manual errors. With Remit AI, approximately 96% of EOB (explanation of benefits) and ERA (electronic remittance advice) data is delivered automatically, leading to an average time savings of over 50% for posting and accounts receivable (A/R) operations.

Scalability and Flexibility

A forecast by [Precedence Research](#) estimates that the U.S. DSO market size was approximately \$145.88 billion in 2024, with projected growth to around \$284.07 billion by 2034, reflecting a CAGR of 6.87%. Additionally, [LEK Consulting](#) reports that in 2024, about 23% of dental offices are affiliated with DSOs, a figure expected to rise to nearly 39% by 2026.

As DSOs expand—and transaction volumes grow with them—scalable solutions are essential for sustaining performance without increasing overhead costs. Cloud-based platforms enable seamless scaling, allowing practices to integrate new locations without additional infrastructure while simplifying onboarding to reduce complexity.

Resource Optimization and Cost Savings

Efficiency isn't just about increasing revenue—it's also about optimizing resource utilization. Practices adopting AI-driven solutions like posting automation have already achieved substantial cost savings. A detailed cost structure analysis shows that the effective unit cost for manual posting decreased from \$2.70 to approximately \$2.00 per claim, compared to an industry average of \$2.17 to \$2.92 per claim. By leveraging APIs with specific practice management systems, Remit AI can automatically match bank-cleared payment data—including both EOBs and ERAs—to corresponding open claims, posting payments at the claim line-item level without any manual intervention.

AI Solutions

decreased cost per claim posted

\$2.70 down to \$2.00



Human-AI Collaboration in RCM Teams

AI agents are set to revolutionize RCM—not by replacing human workers but by enhancing their capabilities. AI will handle repetitive tasks like payment posting and claim adjustments, freeing team members to focus on strategic roles such as relationship management and process optimization. The synergy between AI and human expertise will drive smarter workflows, faster problem-solving, and greater ROI for DSOs.



Founded in 2015, **Zentist** is the leading cloud-based RCM software provider for U.S. DSOs and Dental Groups, offering AI-powered solutions like Remit AI for automated payment posting, EOB and ERA data intelligence, and reconciliation across 1,850+ payers.



Teresa Duncan, MS
CEO, Odyssey Management

Simplifying Dental Insurance Administration



Dental practices are facing growing challenges with insurance administration, which is a critical part of their revenue cycle. From increasingly complex network arrangements to higher documentation requirements for claims, the administrative burden can feel overwhelming. For many offices, these demands are threatening profitability.

Unfortunately, most practices do not track the time spent on tasks like insurance verification, claims management, and appeals. When combined with rising labor costs, the true impact of these inefficiencies becomes clear. It's no surprise that practices are turning to API integrations and outsourcing revenue cycle management (RCM) to streamline processes and reduce costs.

The Complexity of Insurance Plan Designs

Managing insurance plans has become far more complicated in recent years. Manually coordinating benefits, interpreting plan designs, and addressing denials are just a few of the tasks that weigh down dental teams. For example:

- **Time-Consuming Benefit Research:** Plans now include more frequency limitations, restrictive clauses, and variations in coverage. Even seasoned coordinators find themselves double-checking details.
- **Leased Networks:** These arrangements allow practices to join multiple insurance plans under a single fee schedule. While appealing in theory, the growing complexity often leads to diminishing returns. Many practices question whether the reimbursement justifies the administrative effort required to participate.

This increase in complexity is a common reason dental practices choose to terminate network contracts. Simplifying plan management is essential for long-term sustainability.

Legislative Changes Are Coming

Changes in state laws are adding another layer of complexity for dental practices and RCM teams. For example:

- **Stricter Financing Regulations:** States like Illinois are introducing laws that impose tighter controls on third-party patient financing options. Dental offices must adapt quickly to comply and avoid penalties.
- **Virtual Credit Card Payments:** Many states now regulate how insurance companies use virtual credit cards for claim payments. Staying informed about these rules is critical to protect revenue streams and maintain compliance.

Legislative updates require constant attention from administrators to ensure smooth operations.

Protecting Profitability in 2025

The future of dental insurance administration looks challenging, with continued network confusion, rising administrative burdens, and persistent labor shortages. However, practices that take a proactive approach can protect their profitability. Key steps include:

- Monitoring inefficiencies in the revenue cycle before they become cash flow problems.
- Leveraging automation tools and outsourcing solutions to reduce manual labor.
- Keeping up with regulatory changes to avoid costly penalties and disruptions.

Efficient revenue cycle management is essential for staying competitive and ensuring effective collections.

Teresa Duncan conducts dental insurance and management classes and is an annual contributor to the ADA's CDT Companion Guide, the author of *Moving Your Patients to Yes: Easy Insurance Conversations*, and the podcast host of "Nobody Told Me That!" and "Chew On This."



Andrew Smith
CEO, Association of Dental
Support Organizations

ADSO Advocates for Dental Insurance Reform

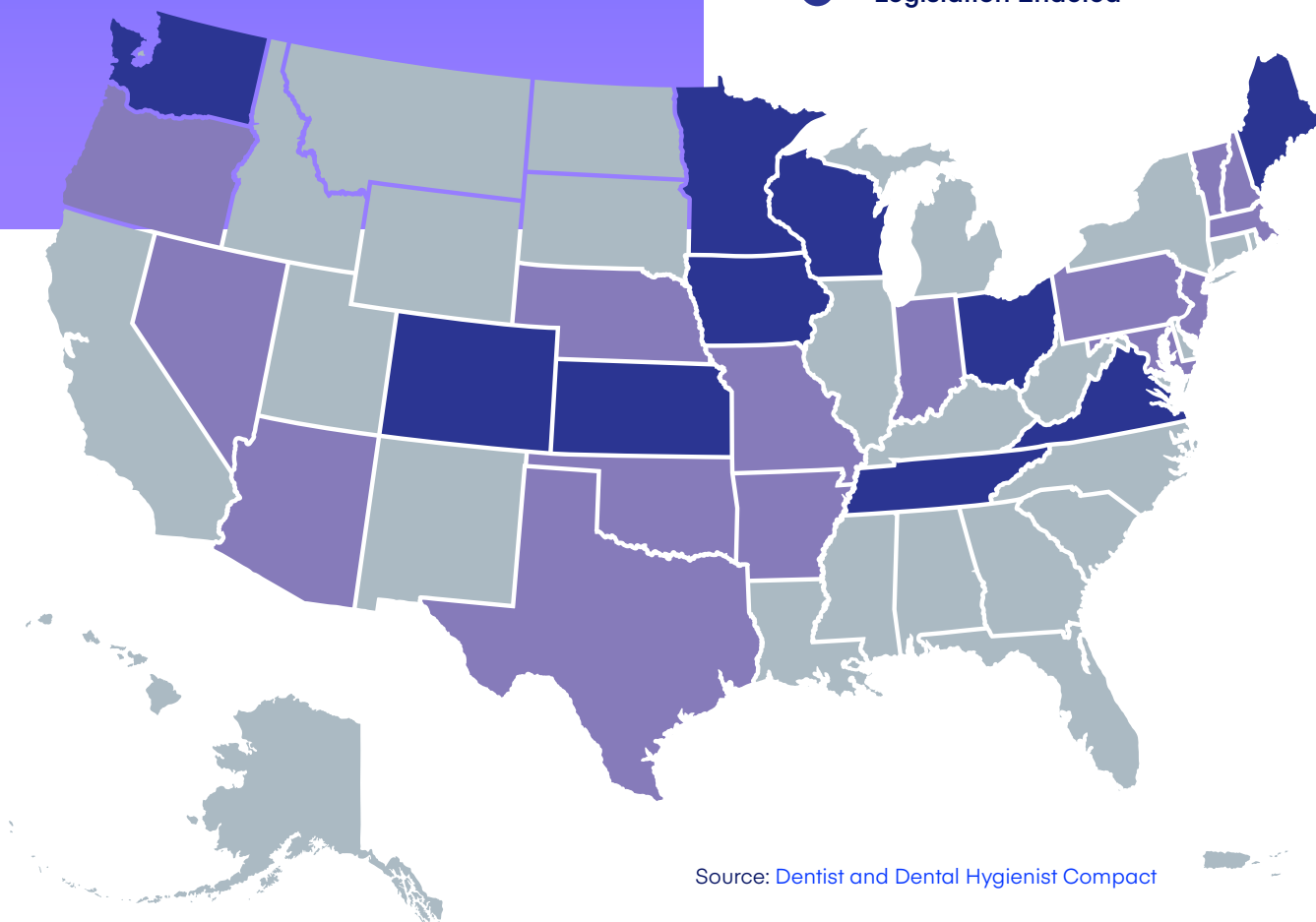
The ADSO is advocating for several legislative changes to help make practicing dentistry easier and to improve access to oral health care.

Licensure Portability

The organization is working to expand the Dentist and Dental Hygienist Licensure Compact, which is an interstate agreement that enables dentists and hygienists who are licensed in one compact member state to practice in another participating state without needing multiple state licenses.

Here is a look at where legislation is pending or enacted.

- No Active Legislation
- Legislation Pending
- Legislation Enacted



Source: [Dentist and Dental Hygienist Compact](#)

Dental Insurance Reform

The ADSO has identified three areas of dental insurance reform that would streamline operations and help providers receive payment in a timely manner:

Assignment of Benefits

The organization is working to pass legislation for assignment of benefit laws that empower patients to have their benefit payment sent directly to their dentist. Currently, some dental plans will not honor the patient's request for assignment of benefits to non-participating dentists even though the patient has given written permission.

For dentists, the legislation could mean a more streamlined payment process and fewer delays in receiving payment for services rendered. For patients, it offers financial ease by reducing the need to pay upfront and then wait for reimbursement.

Medical Loss Ratio (MLR) for Dental Insurers

The ADSO is advocating for more states to follow Massachusetts' lead by requiring at least 80% of premiums be spent on actual dental care services as opposed to administrative costs, marketing, and profits.

Virtual Credit Card (VCC) Reform

The ADSO is seeking to enact legislation to stop requiring a dental practice to accept virtual credit card payments from insurance carriers as the only payment option. When an insurance carrier pays a claim via a VCC, the dentist's office must process the payment through a credit card merchant. That typically involves a transaction fee and reduces their net income for the services provided.



The ADSO is advocating for more states to follow Massachusetts' lead by requiring at least 80% of premiums be spent on actual dental care services as opposed to administrative costs, marketing, and profits.



The Association of Dental Support Organizations is a non-profit organization that represents DSOs before the public, policymakers, and the media in addition to supporting DSOs through education, research, and community initiatives.



Rachel Wall, RDH
CEO, Inspired Hygiene

Dental Hygiene Trends

Staffing hygienist roles is a challenge for dental practices, and different states and organizations are looking for creative solutions.

Hygienist salaries are up 10% to 20%—or even higher—since 2020. Many hygienists retired and others traded full-time employment for temporary positions that allow them more flexibility.

ADA Resolutions to Alleviate the Hygiene Shortage

In response, some state dental boards have launched dental assistant expanded functions certifications that permit the dental assistants to assist dentists and hygienists with scaling supragingival calculus, polishing teeth, and giving oral hygiene instructions.

The American Dental Association approved three resolutions in November 2024 to help alleviate the hygienist shortage. Now the state dental boards are evaluating them. The American Dental Hygienist Association is strongly opposed.

- **Resolution 401H-2024:** Increases the ratio of dental hygiene students to faculty members to make education programs more flexible and increase class sizes
- **Resolution 513H-2024:** Allows dental students and residents who have completed their hygienist competencies to practice as dental hygienists
- **Resolution 514H-2024:** Allows foreign-trained dentists to practice as dental hygienists according to state licensing rules

Elevating Hygiene Care

For dental hygiene teams to remain profitable, hygienists must embrace their role as a healthcare practitioner and ensure they are prioritizing the identification and treatment of periodontal disease and incorporating adjunctive services. There are several new technologies including AI for X-ray analysis that can help with identifying potential bone loss, and just as importantly, help patients to understand why they need periodontal therapy.

We also see continued adoption of guided biofilm therapy (GBS), which removes plaque and biofilm from teeth using air flow technology, and Curodont™, which uses a peptide to remineralize enamel and prevent tooth decay.

34%

of hygienists plan to retire by 2030

50%

of audited radiographs were of diagnostic quality

47%

of audited charts included perio charting

67%

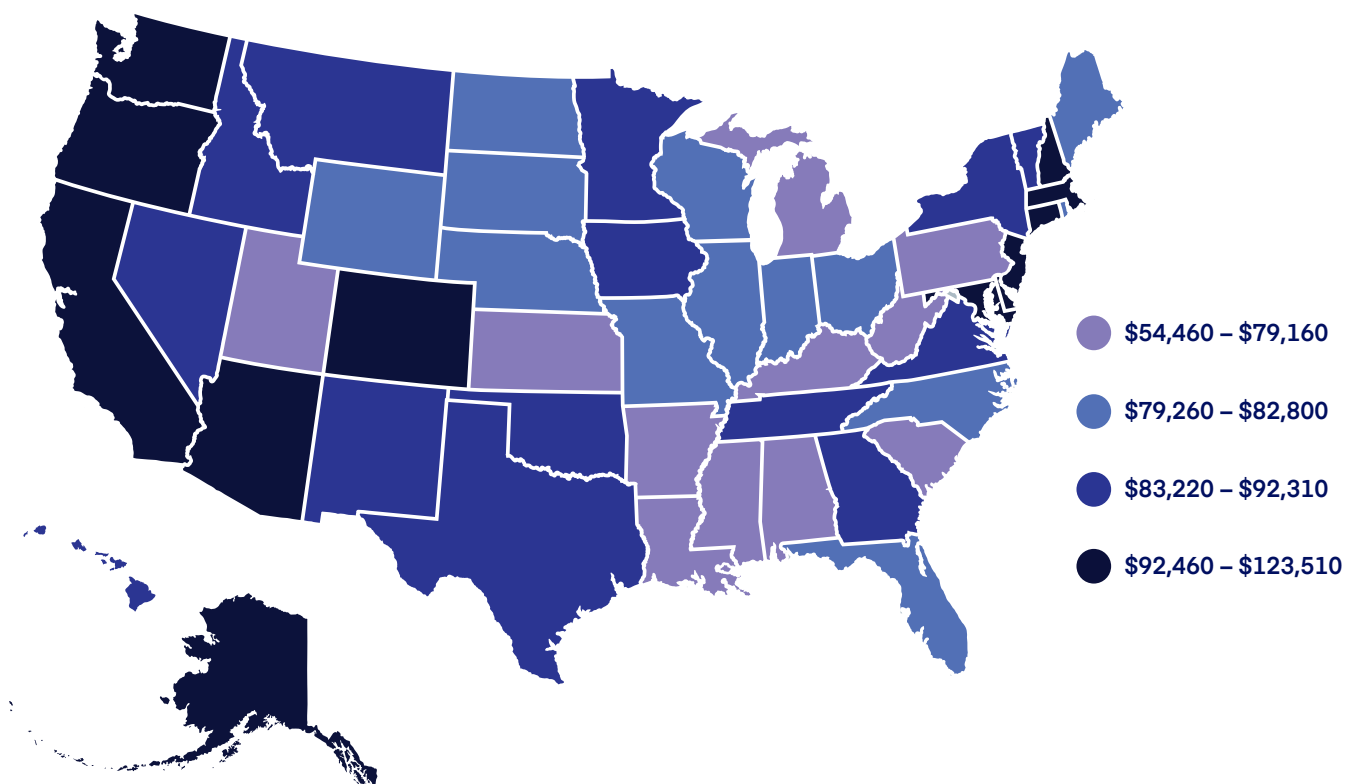
of hygienists said they don't have written standard of care protocols

91%

of dentists have difficulty recruiting hygienists

Sources:
Dentalpost Dental Salary Survey,
the ADA Health Policy Institute,
and Inspired Hygiene survey

Annual mean wage of dental hygienists by state



Source: U.S. Bureau of Labor Statistics



Inspired Hygiene provides online and in-office hygiene program evaluation, coaching, and custom strategies to grow hygiene departments.



Aman Kaur, DMD
Founder, Women in DSO

Changing Demographics in Dentistry

The face of dentistry is changing—and it's about time. As the baby boomer generation retires, the dental workforce is projected to be younger in 2028 than it was in 2024, according to the American Dental Association Health Policy Institute (ADA HPI).



Increase in Female Dentists and DSO Leaders

There's also been a significant rise in the number of female dentists. As of October 2024, 15% of dentists aged 65 years and older were female. Decades ago, it wasn't common for women to become dentists. It was hard for them to even get bank loans to go to school or to open a practice.

By contrast, the 2023 graduating class was 55% female. Now, even more women are entering the profession. The incoming class of 2023 was 57% female.

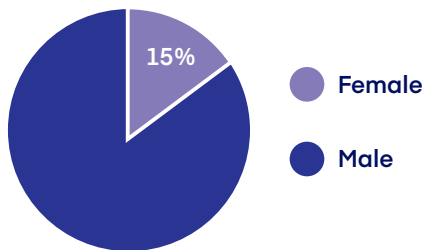
57%
of dentists entering
the field are female

It's trending positively in the operatory, in leadership positions, and in thought leadership opportunities. Just a few years ago, less than 20% of speakers at dental conferences were female. Now, more conferences are making an effort to ensure the voices and success of women leaders are showcased. As more women see other women in leadership positions, it empowers them to dream bigger and reach higher.

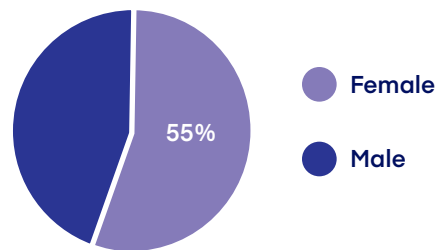
Empowering a New Generation of Leaders

Organizations like Women in DSO bring together trailblazing leaders to collaborate, innovate, and elevate one another. Through mentorship programs, networking opportunities, and leadership training, we're fostering the next generation of women leaders in dental groups.

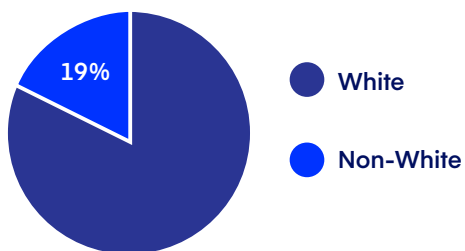
Active Dentists
65+ (2024)



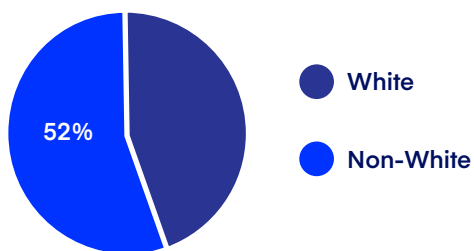
Graduating
Class (2023)



Active Dentists
65+ (2024)



Graduating
Class (2023)



Source: ADA Health Policy Institute

Changes in Diversity

The changes in diversity go beyond gender. The ADA HPI study found that in the group of dentists nearing retirement age, 81% were white. In the 2023 graduation group, 48% were white.

The changes in diversity are important. The authors of the ADA HPI study report that women dentists and non-white dentists, all else being equal, are more likely to treat patients on Medicaid, which helps expand access to dental care for millions of people.

It's also important because it brings people with different backgrounds and perspectives together to share their ideas and discover different points of view. That in turn fosters creativity and well-rounded decision-making.

Whether it's in the dental practice or the boardroom, we're excited to see more diverse leaders rising into positions of power this year.



Women in DSO is a non-profit organization dedicated to advancing and empowering women in dental support organizations and industry partners through education, mentorship, and networking.



Ophir Tanz
CEO, Pearl

How AI Is Transforming Dentistry and Insurance

Dentists + AI = a winning formula

37%

more decay
detected with Pearl

23%

increase in per
patient production

The dental industry is quickly embracing artificial intelligence for radiograph analysis. But if last year was about adoption, we believe 2025 will focus on activation and optimization, particularly by dental service organizations (DSOs) and multi-location practices.

Last year we saw tremendous interest from DSOs and multi-location practices in using Pearl to deliver consistent, quality patient care across their clinical teams. When clinicians embrace and integrate the technology, their offices see a significant lift in key metrics when compared to offices that favor the status quo.

Second Opinion Analysis

DSO locations that activated Pearl's Second Opinion increased per patient production by 23% on average. This growth reflects how AI boosts operational efficiency, improves diagnostics, and elevates patient trust. It also underscores the importance of network-wide adoption and daily application of the tech.

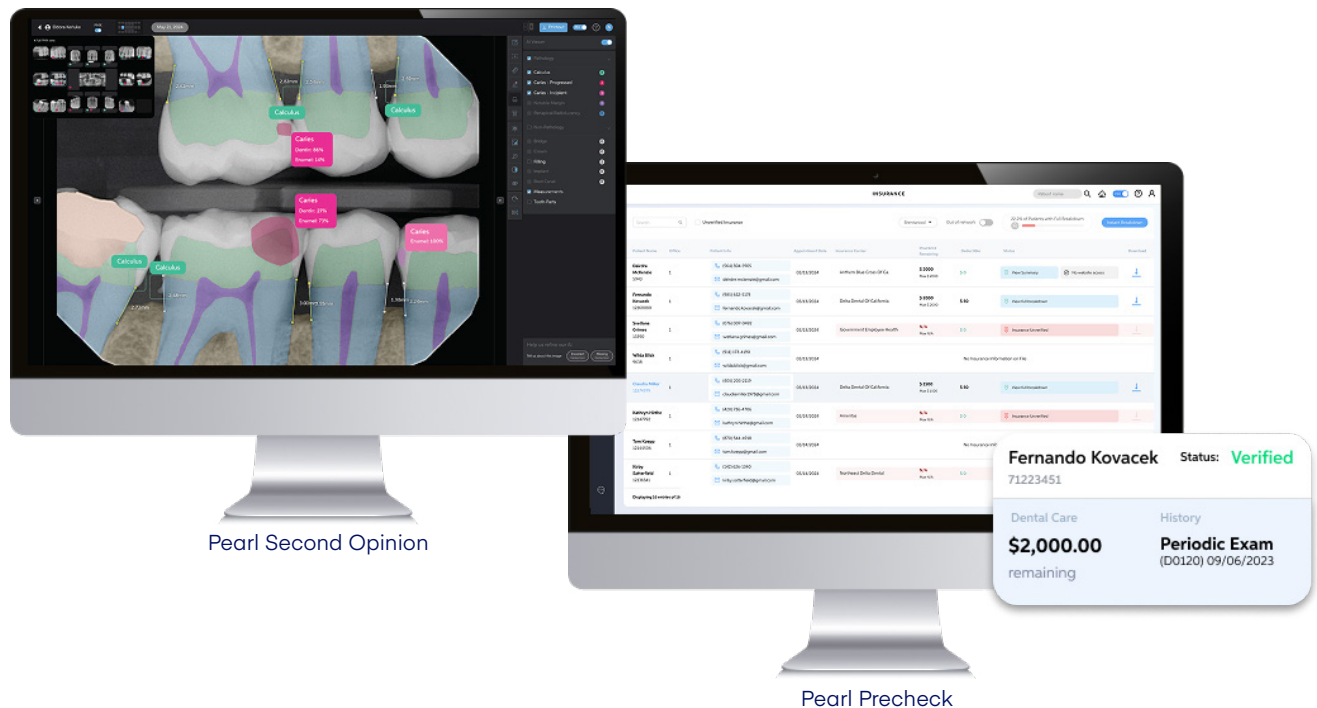
Overall, dentists who use Second Opinion detect 37% more decay than they would have alone. With features like color-coded visualizations that simplify X-ray interpretation, Pearl helps practitioners improve case presentation and drive higher treatment acceptance.

Predictive Analytics and Insurance Verification

In 2024, practices leaned on Pearl's innovative features to reimagine workflows and patient engagement. Tools like Pearl's analytics dashboard identified potential decay by reading previous X-rays prior to the day's appointments. Armed with AI-found opportunities, offices were able to schedule time for predicted treatments instead of reactively reshuffling the day's schedule.

Meanwhile, Pearl's insurance eligibility feature, Precheck, reduced hours spent by front office staff on insurance verifications, freeing up time for direct patient care. These capabilities also increased opportunities for same-day dentistry, enhancing both efficiency and revenue potential.

In 2025, we anticipate a shift from adoption to optimization as practices refine their use of AI to align with their specific needs. DSOs and multi-location offices will focus on leveraging Pearl's tools to achieve seamless integration across their systems. AI-driven enhancements like intuitive diagnostics, time-saving insurance solutions, and operational streamlining will set new benchmarks for efficiency and patient satisfaction. By empowering dental teams to do more with less, 2025 will mark a turning point in how technology transforms practice management and patient care.



Pearl shapes the future of dentistry with a suite of industry-leading clinical AI solutions, which dentists, practices, and labs use to elevate efficiency and patient care.



Wardah Inam
CEO, Overjet

AI Integrations for a Seamless Workflow

Artificial intelligence (AI) is revolutionizing dentistry and nowhere is its impact more evident than in dental imaging.

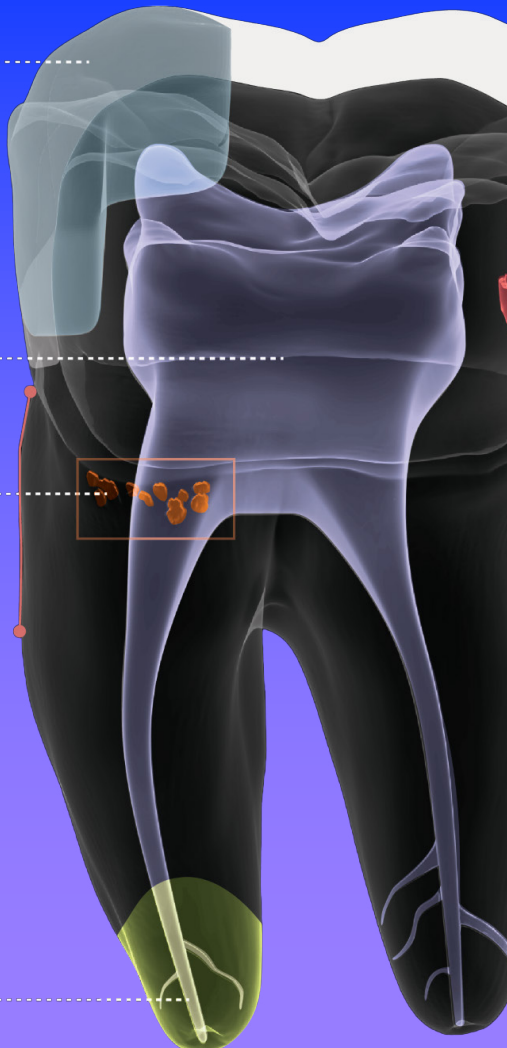
RESTORATIONS

PULP

CALCULUS

3.3

PARL



AI-powered tools are enhancing how dentists diagnose and treat oral diseases, while also streamlining operations for insurance companies. This technology is setting a new standard for accuracy, efficiency, and patient care.

Tens of thousands of dentists already rely on advanced AI technology to detect oral diseases and educate patients. By analyzing dental X-rays with precision, AI enables dentists to identify issues earlier and provide tailored treatment plans. Now the insights go beyond detection—they're reshaping how dental practices operate at every level.

AI Analytics: The Next Leap Forward

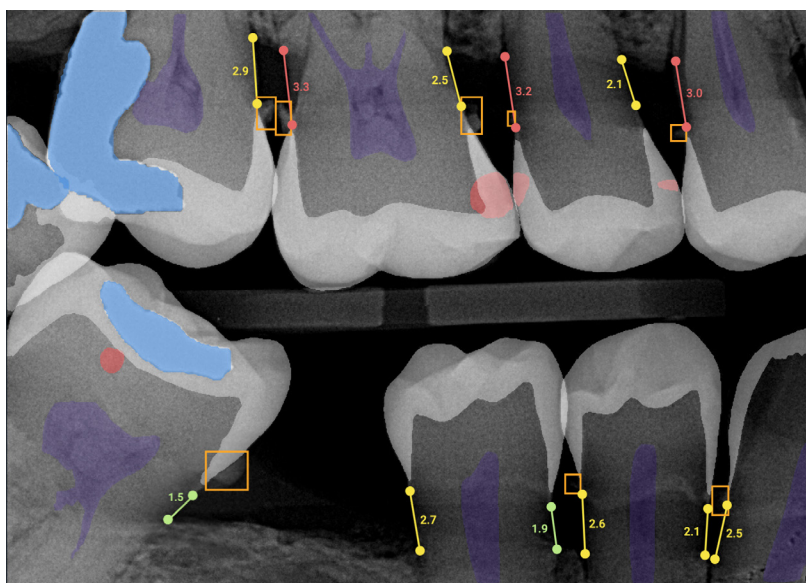
The introduction of AI-powered analytics is transforming how DSOs approach patient care and operational efficiency. Overjet's DSO Analytics, for instance, empowers leaders to evaluate performance across the organization, synthesizing vast amounts of data into actionable insights. With this tool, dental groups can learn from everything happening across their network—from a high-level overview of trends to a granular look at individual patient's X-rays. These insights allow DSOs to identify opportunities for improvement, standardize care, and enhance outcomes across all practices.

Integration for Seamless Workflow

Overjet's innovations extend to smart imaging software that combines AI analysis and imaging into one integrated tool, streamlining workflows for dental professionals. This eliminates the need for multiple systems, saving time and improving accuracy. Soon, Overjet will also bring AI analysis to intraoral photos, further enhancing diagnostic capabilities.

Insurance companies are also benefiting from these advancements.

AI's ability to detect oral diseases with precision helps insurers verify claims more accurately, reducing fraud and expediting approvals. This improves the experience for both providers and patients.



25%
higher case
acceptance
on average

43%
fewer cavities
missed on bitewings
when using Overjet

Source: Overjet

OVERJET

Overjet supports DSOs, dentists, and insurance companies with artificial intelligence solutions for radiograph analysis and patient analytics.



Gary Salman
CEO, Black Talon Security

Cybersecurity Reset: 10 Trends to Watch

High profile cybersecurity attacks on healthcare providers, DSOs, and even major supply chain companies dominated headlines in 2024. The lessons learned from these events remind us that stronger security measures are no longer optional. They're essential. This year will bring sweeping changes as AI evolves, cyber threats grow more sophisticated, and regulations tighten. Here are ten cybersecurity trends to watch for in 2025:

1 **AI in Security—and Attacks**

Artificial intelligence will enhance security with real-time threat detection and automated responses. But the same tools will empower hackers, enabling smarter, faster attacks. IT teams must act quickly to stay ahead of both opportunities and threats in AI.

2 **Ransomware Gets Smarter**

Ransomware will remain a primary threat, using AI to breach networks more efficiently. Criminals will exploit technical weaknesses faster than many IT teams can patch them, raising the stakes for proactive defenses.

3 **Personalized Phishing Scams**

Spear-phishing attacks will grow more deceptive, fueled by AI-generated, highly convincing messages. Hackers will also use tactics like malicious QR codes to trick users into sharing sensitive data.

4 **Remote Work Vulnerabilities**

Remote workers and third-party vendors will face greater risks, making training, VPNs, multi-factor authentication (MFA), and endpoint security non-negotiable for remote access. Organizations must make cybersecurity awareness part of their culture.

5 **Stricter Regulations**

Expect new and stricter cybersecurity laws, forcing businesses to strengthen their compliance strategies. Data handling, breach reporting, and proactive risk management will likely become regulatory focal points.

6 Growth in Cyber Insurance

With the financial risks of breaches rising, cyber insurance will expand. Insurers, however, will demand that businesses implement robust preventive measures before providing coverage.

7 Cloud Security Challenges

The shift to cloud services will continue, requiring improved configuration management and non-stop monitoring. While cloud operations remain safer overall than on-premises systems, their growing popularity will also attract cybercriminals.

8 Collaboration on Threat Intelligence

Sharing cyber intelligence between companies and government agencies will increase, creating a more unified front against cyberthreats. This collaboration will strengthen defenses and help manage future risks.

9 Cybersecurity-as-a-Service

Outsourcing cybersecurity to specialized providers will rise, giving companies access to expert protection without the need for in-house teams. Managed services will be the most cost-effective solution for many businesses.

10 Building Resilience

With cyber incidents on the rise, resilience is now a priority. Companies must implement thorough incident response plans and continuity measures, ensuring quick recovery when breaches happen.

Cybersecurity is no longer an optional investment; it's a core necessity

for protecting operations and earning patient or customer trust. DSOs should evaluate their readiness by asking tough questions. Are their defenses evolving alongside the threats? Are they using the right tools, training, and strategies? Most importantly, are they prepared to safeguard the trust placed in them?

Don't wait for a crisis to act. This is the time to be proactive with confidence and a firm commitment to outpace the threats of the digital age.



Black Talon Security provides advanced cybersecurity services to protect businesses with effective cyber risk mitigation strategies, and swift cyber incident response to minimize disruption and ensure compliance.



Joe Cavaretta
CEO,
Cavaretta Consulting Group



Karla-Marie Santiago
Procurement Expert

The State of the Dental Supply Chain

Global economic trends, technological advancements, and ongoing disruptions in manufacturing and logistics are all leading to another year of volatility in the dental supply chain.



The cost of dental supplies, which encompasses everything from consumables like gloves and masks to restorative materials, has steadily increased in recent years. This trend is expected to persist because of inflationary pressures and increases in tariffs.

For example, tariff rates on disposable face masks from China increased from 7.5% to 25% in 2024, and the tariff rates on rubber medical and surgical gloves increased from 7.5% to 50% in January 2025. In the next year, we anticipate seeing two more increases from the [US Trade Representatives \(USTR\) modifications](#) to tariff rates (from 25% to 100%).

Dental labs are also facing increased costs, primarily driven by the rising cost of materials, labor shortages, the integration of new technologies, and the increase in tariff rates for materials and work completed overseas. The materials used in dental labs—such as porcelain, resins, and high-quality metals—are seeing price increases due to raw material scarcity and higher manufacturing costs. Labor costs for highly skilled technicians remain a challenge.

Here are some procurement priorities to help navigate the challenges:

- **Achieve cost savings and optimize working capital:** Accessing supply spend data allows for a more dynamic decision-making process.
- **Simplify supply chains:** This creates business efficiencies, consolidates supply spend, and establishes supplier relationships that allow for better leverage in pricing and cost-savings.

- **Improve risk protection and management:** Use due diligence and third-party tools to optimize risk screening.
- **Collaborate with suppliers:** This drives innovation in products and processes, leverages data, and provides value-added education for clinicians.
- **Provide strategic foresight:** Hire procurement leaders who understand market dynamics and can support business agility.

This could be another difficult year as the dental industry adapts to rising costs particularly in materials and labor.

By being proactive and embracing technology to improve efficiency and reduce expenses, the industry can navigate these challenges and continue to provide high-quality care to patients.



CAVARETTA
CONSULTING
GROUP

Cavaretta Consulting Group is committed to excellence, providing personalized procurement solutions designed to meet the unique needs of dental service organizations and foster success in the evolving Dentalverse™.



Gary Bird
Founder, SMC National

The 3 Essentials to Growing Your Dental Practice in 2025

The year 2025 can be the turning point when your dental practice takes the leap from ordinary to exceptional. But you have to be willing to adapt because your business-as-usual approach is probably costing you not just money, but opportunities.

Here are the three most valuable steps most dentists can take to increase new patients and boost production this year, according to the [SMC National 2025 State of Dental Marketing Report](#).

Use the Right Marketing Channels

Not all marketing channels produce equal results. For most dental practices, the most effective new patient growth channel is a pay-per-click (PPC) ad campaign via Google and Facebook.

This approach will quickly put you in front of anyone in your community looking for a dentist. And it's also highly predictable. Once you have your campaign dialed in, you can expect to see roughly the same ROI whether you spend \$2,500 or \$10,000 a month on marketing.

There's always some nuance here. SEO is a good secondary strategy, and dentists specifically looking to do more specialty treatment may benefit from additional channels like social media or even television ads.

But for general dentists who want to grow, digital ads will generate the most reliable bang for your buck.

Marketing Channel

Benefits

Challenges



PPC ads

Quickly and predictably generate leads at scale.

Need to be properly targeted for maximum impact.



SEO

Long-term play to gain organic website traffic.

Vulnerable to the whims of Google's algorithm.



Referrals

Low-cost organic growth and more high-trust patients.

Not scalable or predictable.



Social Media

Highlight happy patients or cosmetic procedures.

High follower counts usually don't translate into more patients.



Mailers

Appeal to audiences who may not be very online.

Usually only successful in rural areas where people get less junk mail.



Television

Great for full arch if you know how to convert those leads.

Waste of money when targeting GP patients.

Avoid the Black Hole of Marketing

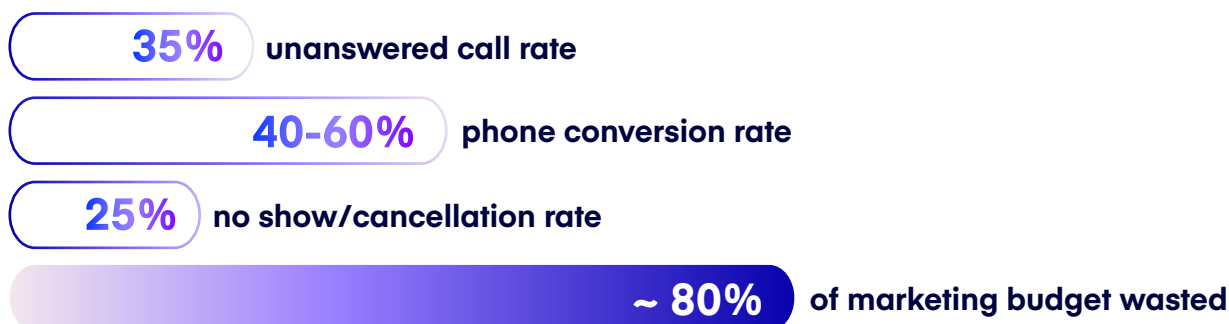
Picking the right marketing channel to invest in is only the first step to growth. You also need to make sure you know how to convert your marketing leads into actual appointments.

The conversion process can be “The Black Hole of Marketing.” Why? So many dentists lose up to 80% of their marketing leads simply because they miss too many new patient phone calls, have trouble scheduling new patients when they do pick up, and lack a system in place to reduce no-shows.

However, these are all solvable problems. If you can get really good at all three, you will see a dramatic rise in your new patients and generate a higher return for every dollar you invest in marketing.

The Black Hole of Marketing

The average dental practice has:



Source: SMC National

Improve Case Acceptance Rate

What dentists need to know is that presenting treatment is a sales job. If you treat it that way and create a thoughtful, professional sales process that helps the patient understand if and how treatment will improve their quality of life, you can push your closure rate from 60% to 70% and significantly boost your revenue at no additional cost.



SMC National, led by Gary Bird, is a unique dental marketing agency dedicated to helping dentists grow their practices by attracting more new patients, boosting production, and enhancing sales through effective lead generation and conversion strategies.

About This Report

The 2025 Dental Industry Outlook is an industry-focused report based on the findings from almost 5,000 dental practices and insights and data from dental industry experts. Individual contributions are copyrighted by their respective authors and used with permission.

Data Collection Methods

The datasets presented in this report are cited accordingly, including from the analysis of 3,400 practices on Denticon and 1,500 practices on Cloud 9. The data review process involved quantitative and qualitative analysis, data mapping, statistical modeling, normalization, anonymization, and validation.

Planet DDS Contributors

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denticon | apteryx | cloud 9

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