



2025 MID-YEAR Dental Industry Outlook

Discover the data, trends, and
insights driving business decisions.



Eric Giesecke
CEO, Planet DDS



Top 5 Dental Tech Trends Redefining the Industry

As we approach 2026, the dental industry is experiencing one of the most profound shifts in its history, driven by digital transformation, artificial intelligence, and changing patient expectations.

For DSOs and multi-location dental groups, staying competitive means looking beyond the operatory and into the technology stack that powers their operations. What's clear is that legacy software isn't just outdated; it's holding the industry back.

Here are five technology trends that will shape the next era of dentistry. The leaders who embrace them will be the ones setting the standard for business excellence and patient care.

1 Replacing Fragmented Systems with Platform Ecosystems

Leaders are moving away from cobbled-together software applications with separate platforms for imaging, patient communication, scheduling, and billing. These disconnected tools increase friction in the office and with patients, create data silos, and force teams to waste time switching between systems instead of focusing on patient care and growth.

2 Integrating AI into More Workflows

Artificial intelligence is no longer a buzzword - it's a business imperative. In diagnostics, AI-enabled imaging platforms like Pearl, Overjet and VideaHealth help clinicians identify issues faster and more accurately. That leads to earlier interventions, increased case acceptance, and better patient outcomes.

But the power of AI doesn't stop at the clinical level. Behind the scenes, AI is helping automate everything from insurance verification and claims management to predictive scheduling and appointment reminders. At Planet DDS, we're embedding AI directly into our practice management platforms to make operations smarter, faster, and more resilient, reducing the amount of time spent on administrative tasks and increasing the amount of time that users can spend with patients.

3 Rethinking RCM with Intelligent Automation

Revenue cycle management has historically been high-friction and error-prone. Automation and API integrations are beginning to transform RCM into a strategic advantage for groups. Tasks like checking insurance eligibility, scrubbing claims prior to submitting, and payment posting can now be handled with minimal human intervention and greater accuracy.

This shift isn't just about efficiency; it's about profitability. Faster claims turnaround and fewer claim denials lead to stronger cash flow and better cash forecasting, which are critical for PE-backed DSOs and growth-focused dental groups.

4 Creating a Digital-First Patient Experience

The modern patient expects the same ease and transparency from their dental care that they get from ordering online or booking a shared ride. Practices that meet those expectations through digital patient forms, online scheduling, two-way texting, and mobile payments will attract more patients and demonstrate more patient loyalty.

These digital touchpoints also feed data back into the practice's core systems, allowing teams to make smarter decisions about scheduling, staffing, and patient communication strategies that will reduce no-shows and open chair time.

5 Developing a Proactive Approach to Security and Compliance

In a world of increasing cybersecurity threats and evolving privacy regulations, DSOs must take a proactive approach to data protection. Cloud-based platforms offer built-in encryption, centralized monitoring, and the ability to roll out security updates in real time, advantages that outdated, server-based systems simply can't match.

More importantly, they help practices stay compliant with HIPAA and other regulations while building trust with patients and partners alike.

Innovating for Tomorrow's Needs

With technology advancing rapidly, companies need solutions that can keep up with the times. Dental groups are transitioning from legacy, closed systems to agile, cloud-based solutions that enable access to the latest innovations and scale with their growth.

The question for dental leaders heading into 2026 isn't if change is coming; it's whether you are prepared to respond to it. The practices that win tomorrow are investing in that transformation today.



Planer DDS is a leading provider of cloud-based solutions, empowering growth-minded dental businesses with a comprehensive platform that includes Denticon practice management, Cloud 9 ortho practice management, and Apteryx imaging to deliver seamless integrations, improved workflows, and scalable technology.





Beth Gaddis
Editor in Chief, Planet DDS

Dental Technologies That Attract Investor Interest



With deal volume down and capital harder to access, DSO leaders are focusing on efficiency, profitability, and scalability to better position themselves as attractive investment opportunities. Standardizing the tech stack is increasingly viewed as a business strategy that signals maturity and drives enterprise value.

“The current market environment is driving a return to fundamentals, and the era of just aggregating EBITDA is over,” said Preston Brice, Managing Partner of Barclay Hill Partners.

Standardization as a Value Signal

Investors are no longer content with growth through acquisition alone. They are prioritizing operational efficiency, same-store growth, and low staff turnover, outcomes that are increasingly driven by a unified and modern tech infrastructure.

Standardizing practice management systems, data analytics platforms, patient engagement capabilities, and revenue cycle management tools show an organization’s maturity.

“Tech stack standardization is the hallmark of a good organization, and it is a value signal to acquirers,” Brice explained. “In order to drive maximum value, you need to have integration and organic growth in addition to high-quality teams and a proven growth model.”

Commanding a Stronger Valuation

This sentiment is echoed by Lorri Detrick, President and COO of Riccobene Associates Family Dentistry, one of the few large DSOs to secure private equity funding in 2024.

“It was obvious throughout our recent quest for a new private equity partner that investors are looking for so much more than profitability,” she said. “Our standardized technology and operating systems provided centralized data, real-time visibility, and operational consistency. That level of transparency not only streamlined the due diligence process; it helped us command a stronger valuation.”

Automation and AI as Force Multipliers

The benefits of tech standardization extend beyond valuation. Automation and AI tools are helping DSOs offset labor shortages and improve patient care.

“AI and automation allow us to do more with less, and to do it better,” said A.J. Peak, founder of Peak Dental Services.

Tools like Denticon’s 835 auto posting, Pearl AI for radiograph analysis, and Patient Prism for call handling help Peak Dental reduce administrative burdens and enhance the patient experience.

How Investors Evaluate Tech Infrastructure

Both private equity firms and strategic buyers are taking note.

“The tech stack is one of the many diligence items investors review,” said Gareth Petsch, Managing Director of pH Partners. “High levels of standardization and consistency across the platform would be considered best-in-class and receive favorable outcomes. A lack of clarity and standardization, especially in data systems, can delay or derail M&A transactions.”

Positioning for M&A Rebound

Looking ahead, experts anticipate a rebound in dental M&A activity by 2026. Now is the time to prepare.

“You need to cultivate a strong organizational culture, foster positive relationships with affiliated doctors, and leverage technology for operational efficiency and growth,” said Brian Colao, Director of Dykema’s DSO Industry Group.

The bottom line? Standardizing your tech stack today is not just about solving current operational challenges—it’s about positioning your organization for future success.

As Rick Kes of RSM put it, “Standardization and building efficiencies through technology is generally the first place we look to help our clients build enterprise value accretion.”

CONTRIBUTORS



Preston Butler
Barclay Hill Partners



Brian Colao
Dykema



Lorri Detrick
Riccobene Associates Family Dental



Rick Kels
RSM



A.J. Peak
Peak Dental Services



Gareth Petsch
Ph Partners

2025 Mid-Year Data Trends

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

56%

56% average **case acceptance rate** marked as accepted, scheduled, or completed 1/2025 – 6/2025

2024 industry average: 57%

46%

46% average **case completion rate** of treatment plans created between 7/2024 – 12/2024 that were completed by 6/2025

2024 industry average: 42%



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

2024 industry average: 43

14.4%

14.4% of patients **canceled an appointment** in advance

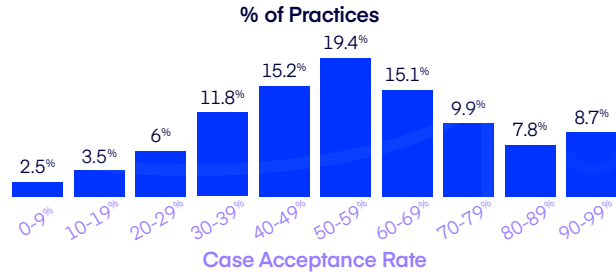
2024 industry average: 15.5%

6.2%

6.2% of patients **failed to show** for an appointment without prior notice

2024 industry average: 7.4%

Case Acceptance Varies Widely by Practice

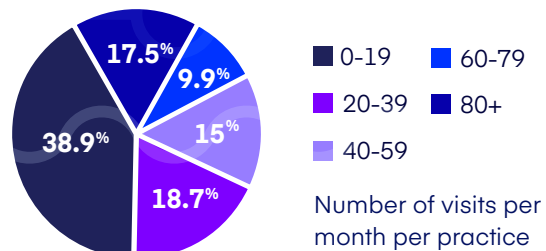


65%

65% average **hygiene reappointment rate** within months

2024 industry average: 59%

Number of New Patients Varies Widely



9%

9% increase in **new patient appointments** for orthodontic consultations

Source: Analysis of 2,500 practices on Cloud 9

70%

70% **case acceptance** for orthodontic treatment

Source: Analysis of 2,500 practices on Cloud 9

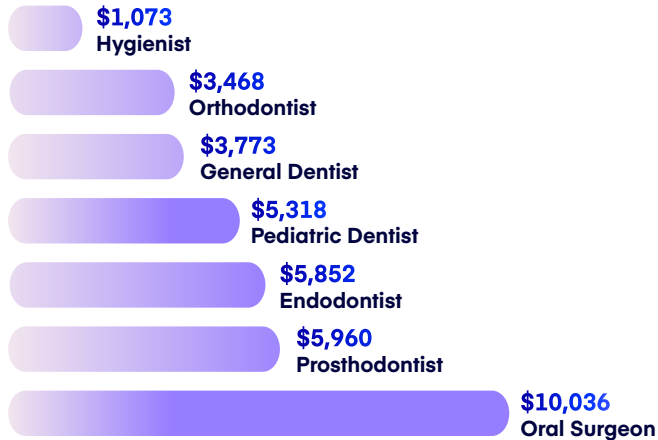
Source: Planet DDS analysis of more than 5,200 practices on Denticon includes general dentistry, specialty dentistry, emergency dental clinics, and mobile dentistry clinics. Individual practice results are influenced by their patient mix, provider mix, and payor mix.

Same-Store Growth Trends

A Planet DDS analysis of 2,800 practices showed **59.7% achieved same-store growth in production** during the first six months of 2025, compared to the first half of 2024.

Same-Store Growth across 2,800 practice locations	Q1 2025	Q2 2025
Average	8.1%	9.8%
Trimmed Mean Removed top and bottom 10%	4.4%	5.8%

Average Daily Production by Provider

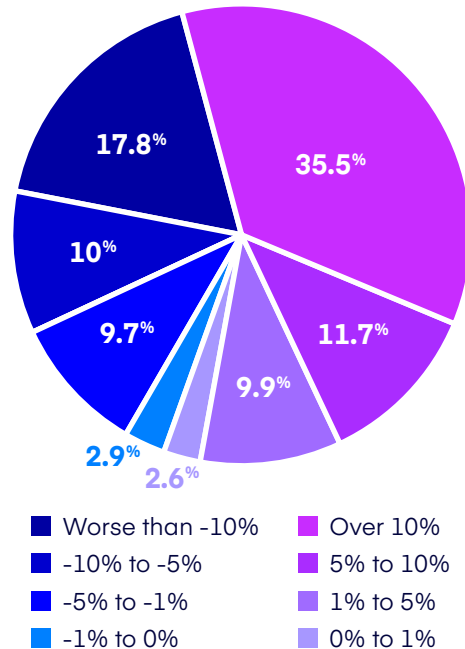


Average Daily Production by Practice



The gross daily production figures are calculated by the practice's expected collections, not UCR fees. They do not reflect adjustments or write-offs

January - June YoY Production Growth



The Dental Economist Show.



SUBSCRIBE NOW!



denticon | apteryx | cloud 9

Planet DDS is a leading provider of a platform of cloud-based solutions that empowers growth-minded dental businesses. Now serving over 13,000 practices and 118,000 customers in North America, Planet DDS delivers a comprehensive suite of solutions, including Denticon Practice Management, Cloud 9 Ortho Practice Management, Apteryx Cloud Imaging, and Planet DDS Practice Marketing. Planet DDS is dedicated to enabling dental support organizations (DSOs) and groups to grow and thrive with technology that delivers seamless integrations, improved workflows, and future-proof scalability. To learn more, visit PlanetDDS.com

© Planet DDS. All rights reserved.



*This publication may be excerpted, cited, or distributed without the prior written permission of Planet DDS.
Please cite as follows: Planet DDS 2025 Mid-Year Dental Industry Outlook, August 1, 2025.*