

Dental Practice Management Software - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Dental Practice Management Software Market size is estimated at USD 2.13 billion in 2024, and is expected to reach USD 3.57 billion by 2029, growing at a CAGR of 10.95% during the forecast period (2024-2029).

The COVID-19 pandemic significantly impacted the dental practice management software market. The high risk of contracting COVID-19 infection in the initial phase of the pandemic in the year 2020 was the major factor that led to a drop in the number of patients visiting dental clinics across the globe. For instance, according to an article published by American Dental Association in June 2020, the COVID-19 pandemic has significantly impacted high-contact industries, including dentistry. As a result of strict social distancing guidelines imposed by many states, dental clinics were closed. Furthermore, the American Dental Association (ADA) issued guidance in March 2020 that dental practices postpone elective procedures and only provide emergency or urgent care. This subsequently led to decreased demand for dental treatment, eventually decreasing the demand for dental practice management software, which affected the market. However, the market is gradually stabilizing as COVID-19 cases decrease, resulting in the return of the normal demand levels for dental procedures. For instance, according to an article published by the Times of India in July 2022, the dental health industry coped with increased complaints. Dentists saw a 30-40% spike in footfall at their clinics; patients were finding it tough to get appointments. Thus, an increase in dental procedures is expected to significantly impact the dental practice management software market over the forecast period.

Factors responsible for the growth of this market include the increasing incidence of dental diseases and the rising geriatric population, growing technological advancements in dental practice management software, and the surge in the need for high-maintenance amounts of medical data generated by dental practices. For instance, as per November 2022 estimates of the WHO, oral diseases affected close to 3.5 billion people worldwide, with 3 out of 4 people living in middle-income countries. Furthermore, according to the American Dental Association update, in November 2022, the global cases of oral diseases have

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increased by 1 billion over the last 30 years. Thus, the surge in the incidence of oral diseases worldwide leads to more patient visits to dental clinics. This, in turn, leads to the generation of a high volume of medical data, which requires management, thereby driving the demand for dental practice management software. Furthermore, according to an article published by the National Library of Medicine, in August 2022, the prevalence of periodontal disease in middle-aged and elderly individuals is high. Thus, the geriatric population showing a high prevalence of periodontal disease will increase the demand for dental practice management software in the market.

Additionally, various initiatives taken by the key market players, such as product launches, mergers, acquisitions, and partnerships, are expected to boost the market's growth during the forecast period. For instance, in October 2022, Henry Schein One, a joint venture of Henry Schein, Inc. and Internet Brands, and Smile Brands reported that Dentrax Ascend cloud-based practice management software from Henry Schein One was adopted as the exclusive dental practice management system of Smile Brands and its affiliated dental practices. Such an initiative is expected to drive the growth of the market.

Therefore, the abovementioned factors are attributed collectively to the studied market growth over the forecast period. However, a shortage of skilled IT professionals will hinder market growth over the forecast period.

Dental Practice Management Software Market Trends

Web-based is Expected to Hold Significant Share in the Current Market of Delivery Mode Segment

On-premises dental practice management software is deployed on a local network in the office. For instance, the system is installed on an in-house server and uses the office's computer resources. Furthermore, on-premises dental software provides more control over security, as the entire software and database of patients remain on-site, and the office has full control over it. The on-premise software is utilized internally and within the IT infrastructure of a dental organization. Software installed and used by computers inside a building or organization is known as on-premises software. With the increasing dental visits, utilization of on-premise software across dental organizations, and the rising investment in the adoption of healthcare IT, the segment is expected to witness growth over the forecast period. For instance, as per the report published in March 2023 by the Australian Institute of Health and Welfare, the Patient Experience Survey 2021-22 (ABS 2022) found that for people aged 15 and over, it is estimated nearly half (49%) visited a dental professional in the last 12 months, and of those who needed to and saw a dental professional, the majority (57%) visited more than once in the last 12 months. Thus, increased dental visits increased demand for web-based dental practice management software, driving the market's growth.

The companies are actively involved in new product launch developments and collaborations to expand their footprint, which is expected to drive segmental growth. For instance, in June 2021, Curve Dental partnered with Dental Intelligence to receive access to LocalMed, a web-based scheduling system. This partnership aimed to make it easier for dental businesses to use Curve Dental's practice management software, which allows patients to confirm appointments virtually.

Thus, the above factors will likely contribute to the segment's growth over the analysis period.

North America is Expected to Hold a Significant Share in the Market and Expected to do Same in the Forecast Period in the Forecast Period

North America is expected to hold a significant market share in the dental practice management software market due to the rising prevalence of dental disease and high disposable income in this region. According to the American Cancer Society, in 2022, approximately 54,000 Americans are estimated to be diagnosed with oral cavity or oropharyngeal cancer in the United States. Also, according to the ADA, in January 2022, there were around 201,927 professionally active dentists in the United States. The increasing number of dentists in the country is expected to increase demand for dental practice management software.

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Furthermore, according to the data published by the Canadian Dental Association, in September 2022, there are approximately 25,500 licensed dentists in Canada in 2022, representing 65 dentists for every 100,000 Canadians. They are operating in roughly 16,000 dental offices in Canada. Thus, the increasing number of dentists is expected to propel the studied market growth in the region.

Moreover, several companies are continuously working on approval for dental lasers, which is also one of the driving factors for market growth. For example, in October 2021, Curve Dental added text-to-pay and self-scheduling functionality to its GRO patient engagement module. Through the partnership with Global Payments Integrated, Curve GRO provided practices with the ability to have their patients opt-in to receive a text message containing their current balance and due date with reminders. Thus, because of the factors above, the dental practice management software market is expected to grow tremendously in North America over the forecast period because of the aforementioned factors.

Therefore, the abovementioned factors are expected to drive market growth in the region during the forecast period.

Dental Practice Management Software Industry Overview

The Dental Practice Management Software Market is moderately competitive due to the presence of companies operating globally and regionally. The competitive landscape includes an analysis of a few international and local companies with significant market shares. Some of the key players in the sharp containers market are Carestream Dental, Patterson Companies Inc., Henry Schein Inc., Curve Dental, Inc., and ACE Dental, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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