The State of the U.S. Dental Economy

2nd Quarter 2026 Update
Plus: AI Usage in Dental Practices

HPI Health Policy Institute
ADA American Dental Association®

Q2 2026 State of the U.S. Dental Economy Report

This quarterly overview of the state of the U.S. dental economy from the ADA Health Policy Institute draws insights from proprietary data collected from a robust sample of dental practices in the U.S. and the latest economic data related to dentistry from various government sources. The report includes four core sections:

- **Dentists' Economic Confidence:** Key indicators of the general sentiment in dental practices
- **Consumer Dental Spending:** Statistics on dental spending by households
- **Dental Practice Economics:** Trends in provider reimbursement rates, prices for dental equipment and supplies, dentist busyness, and future investment decisions
- **Dental Jobs Market:** The state of the job market in dental offices, including employment trends, staffing and recruitment issues

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Plus: AI Usage in Dental Practices

This quarter's report also includes valuable insights from dentists on their usage of and attitudes toward AI for clinical and non-clinical tasks.

AI Usage in the Dental Office

Dentists' current and planned use of AI.

Attitudes about AI Use in Dentistry

Dentists' feelings about AI's place in dentistry.

Dentists' Economic Confidence

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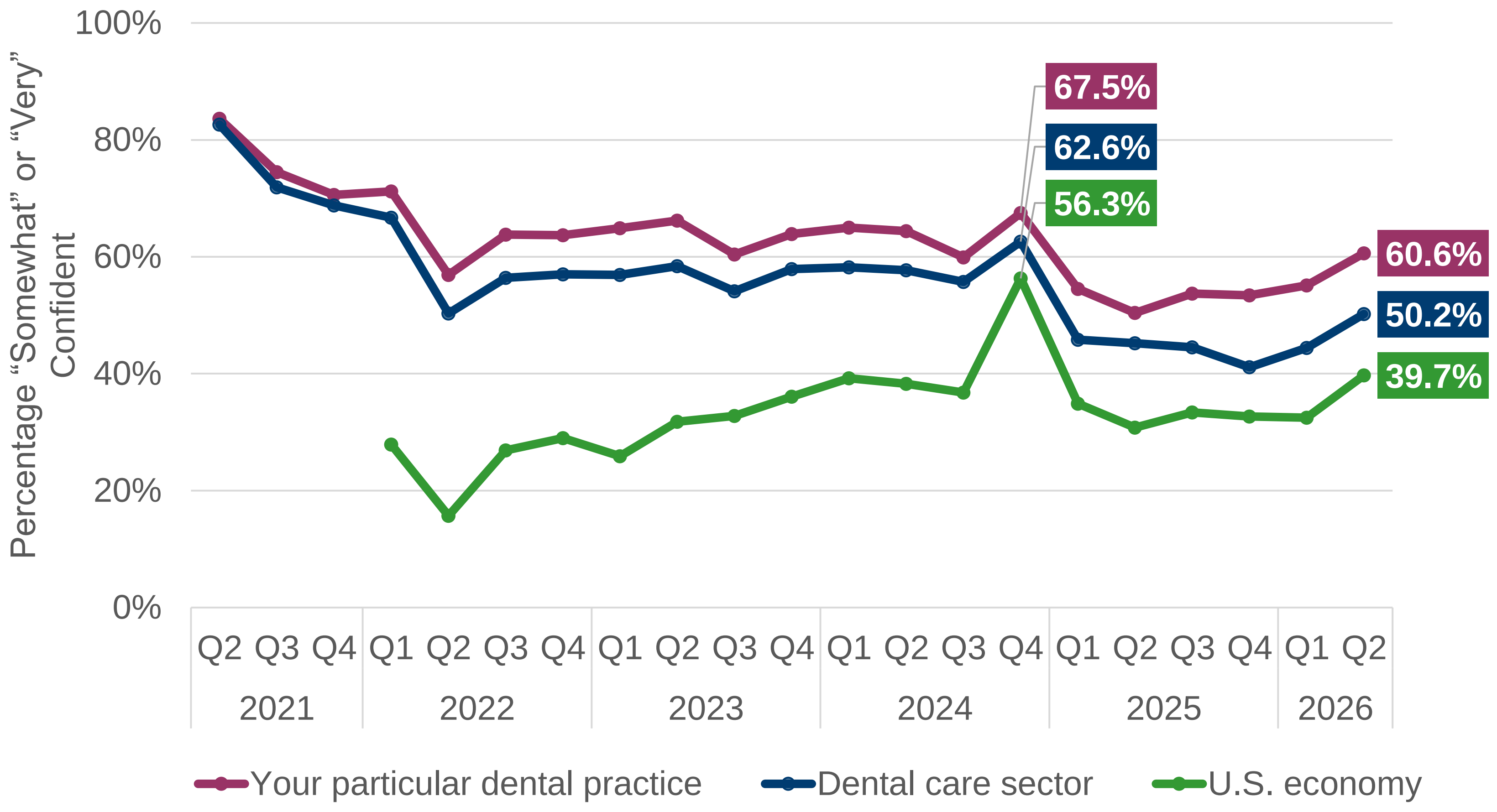
Dentists' Economic Confidence Trending Up



In Q2 2026, dentists' confidence **in their particular practice,** the **dental care sector,** and the **overall U.S. economy** went up compared to the previous quarter.

While trending upward, confidence is still down from late 2024.

Source: ADA Health Policy Institute

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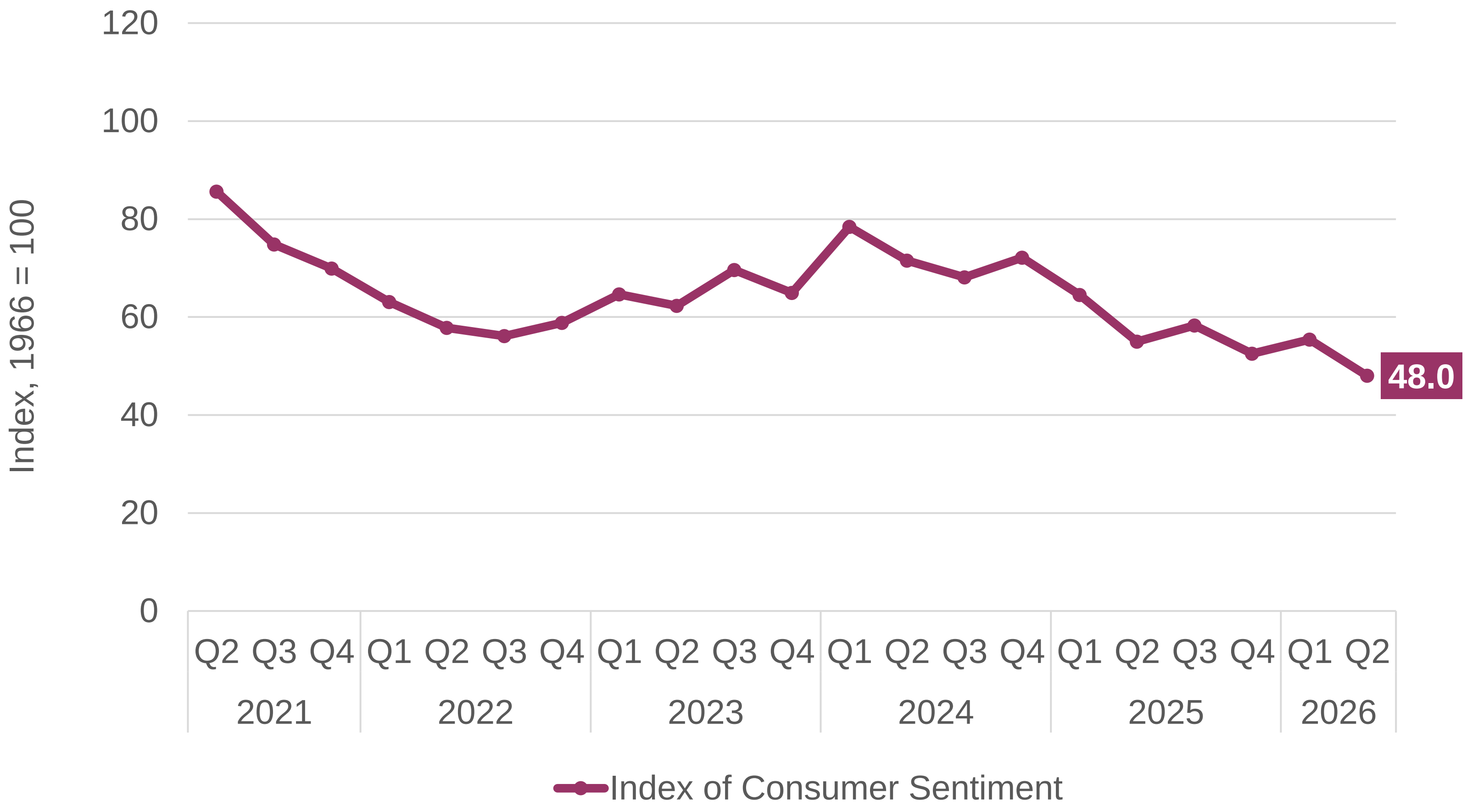
Consumer Economic Confidence Trending Down



While dentists' economic confidence is up in Q2 2026, the economic confidence of U.S. consumers is down.

The index of consumer sentiment measured by the University of Michigan is at an historical low.

Source: University of Michigan

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Why Dentists Feel **Confident** about the **Dental Sector**

More dentists are confident than are skeptical about the dental care sector. These are the top reasons for this rating among dentists who are confident about the dental sector in Q2 2026.

TOP FIVE REASONS FOR CONFIDENCE

50.2%

Share of Dentists Confident about the Dental Care Sector in Q2 2026

1. Dentistry is always needed (39.6%)
2. Strong demand, practice busyness (22.6%)
3. Positive economic outlook in general (17.0%)
4. Patient demand exceeds supply of dentists in the area (8.0%)
5. Patient awareness/value of oral health (8.0%)

Source: ADA Health Policy Institute

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Why Dentists Feel **Confident** about the **Dental Sector**

WHAT DENTISTS ARE SAYING…

"People keep growing teeth and getting cavities."

"There are not enough dentists to provide care for those who need care."

"People will always need dental care. Things may change and look differently, but dentists will always be needed."

"The need for basic care is recession proof."

"It's a stable industry in an unstable world."

"Patients have an increased awareness and greater understanding of their dental needs and wants."

Source: ADA Health Policy Institute

Why Dentists Feel **Skeptical** about the **Dental Sector**

More dentists are confident than are skeptical about the dental care sector. These are the top reasons for this rating among dentists who are skeptical about the dental sector in Q2 2026.

25.2%
Share of Dentists Skeptical about the Dental Care Sector in Q2 2026

TOP FIVE REASONS FOR SKEPTICISM

1. Low reimbursement, insurance pressures (34.7%)
2. Patients unwilling/unable to prioritize dental care (24.6%)
3. Rising practice costs/inflation (21.2%)
4. U.S. economic downturn (21.2%)
5. Rise in corporate dentistry/DSOs (11.0%)

Source: ADA Health Policy Institute

Why Dentists Feel **Skeptical** about the **Dental Sector**

WHAT DENTISTS ARE SAYING…

"Low insurance reimbursement rates combined with rising operational costs."

"Dentistry is being taken over by the corporate entities..."

"Insurance maximums and reimbursements not keeping up with increased overhead and payroll."

"Economic pressure has been building, at some point people decide routine care is a luxury."

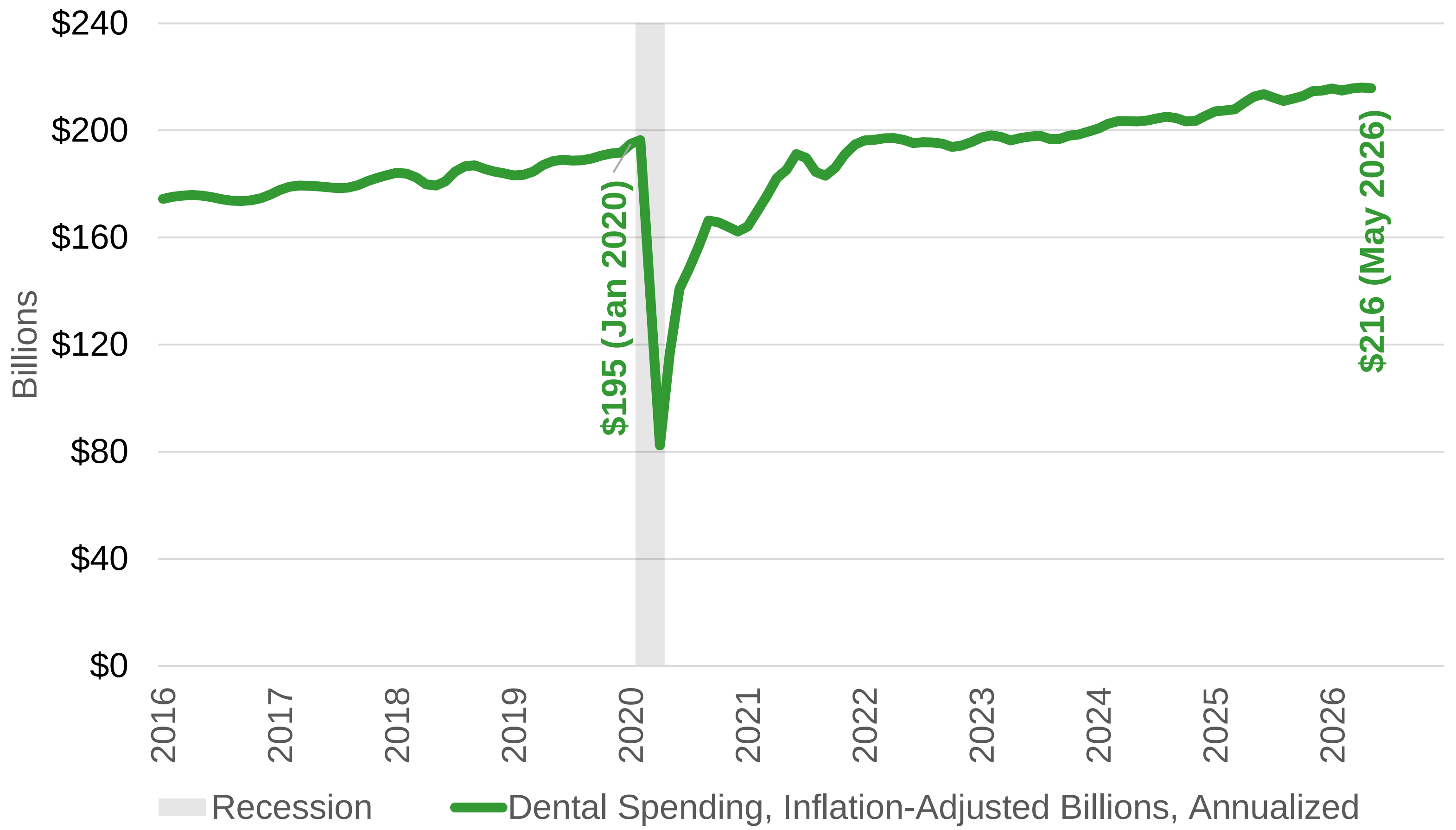
"U.S. economy – people cannot afford to live. Dentistry will become even more of a luxury that fewer people can afford."

"Patients seem to want to spend less on elective care and hold off on regular or critical care."

Source: ADA Health Policy Institute

Consumer Dental Spending

Consumer Dental Spending Up 1% in 12 Months



In May 2026, consumer dental spending was:

- Down 0.1% from month prior
- Up 0.4% year-to-date
- Up 1% from 12 months prior
- Up 11% from pre-pandemic

Source: Bureau of Economic Analysis. Note: Adjusted for inflation, 2026 dollars.

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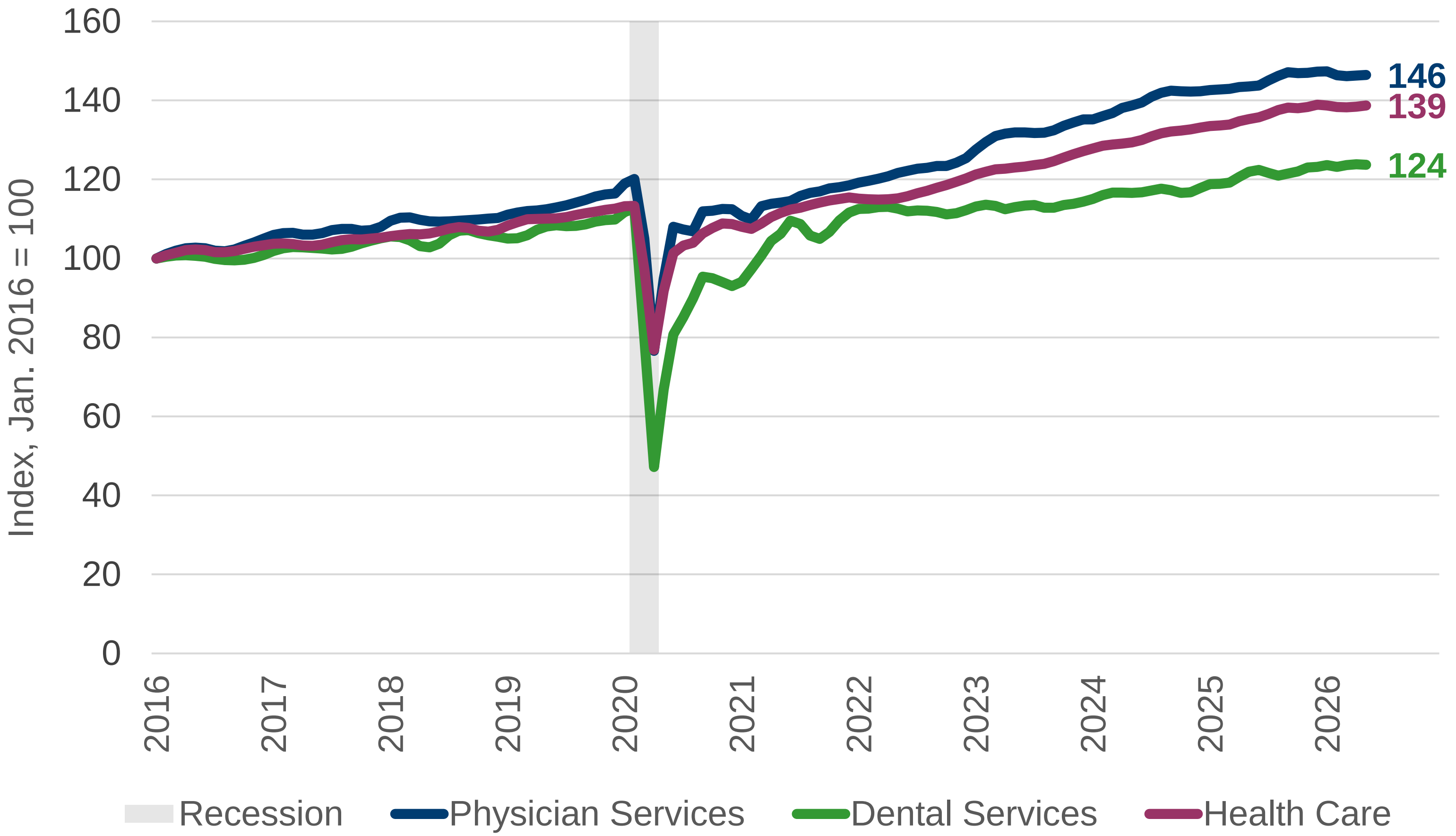
Dental Spending Lags Health Care Spending



Consumer dental spending continues to lag health care spending overall.

Over 10 years, consumer spending on:

- **physician services** is up by 46%
- **health care** is up by 39%
- **dental services** is up by 24%

Source: Bureau of Economic Analysis. Note: Adjusted for inflation. Growth measured in May 2026 relative to January 2016.

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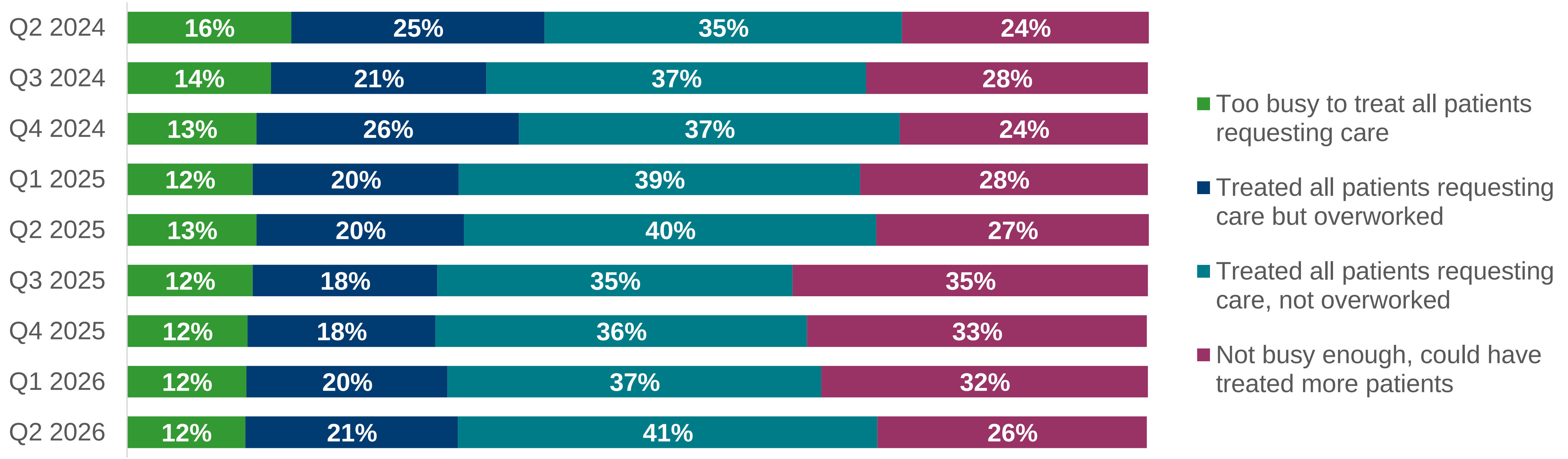
Dental Practice Economics

Dentists are Busier in Q2 2026



In Q2 2026, around one-quarter of dentists reported that they were **not busy enough,** down from previous quarters. The share of dentists reporting they **treated all patients but not overworked** went up.

Source: ADA Health Policy Institute

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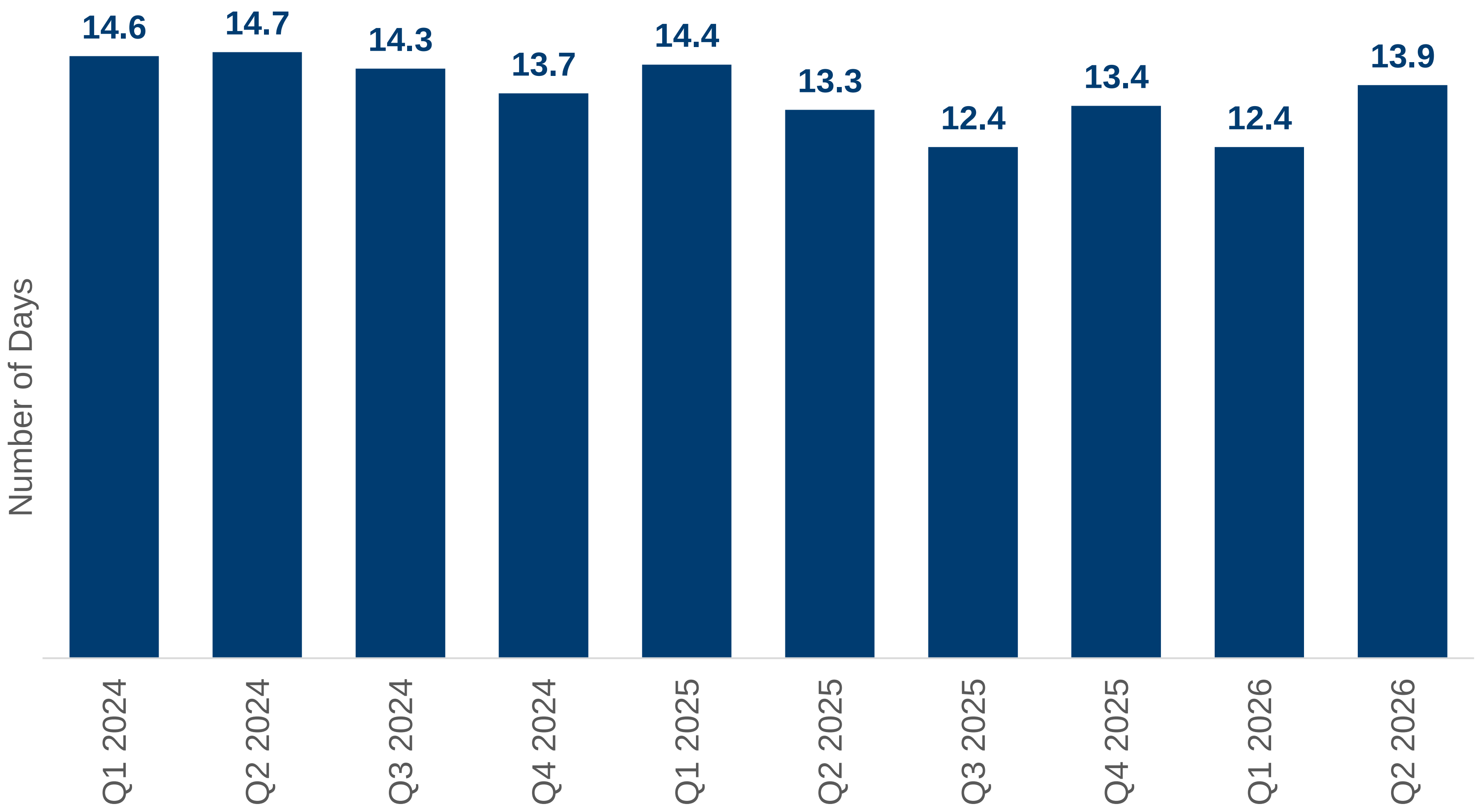
Appointment Wait Times Up



Appointment wait times for new patients went up slightly in Q2 2026 compared to last quarter to an average of 13.9 days but are still lower than a peak in Q2 2024.

Source: ADA Health Policy Institute

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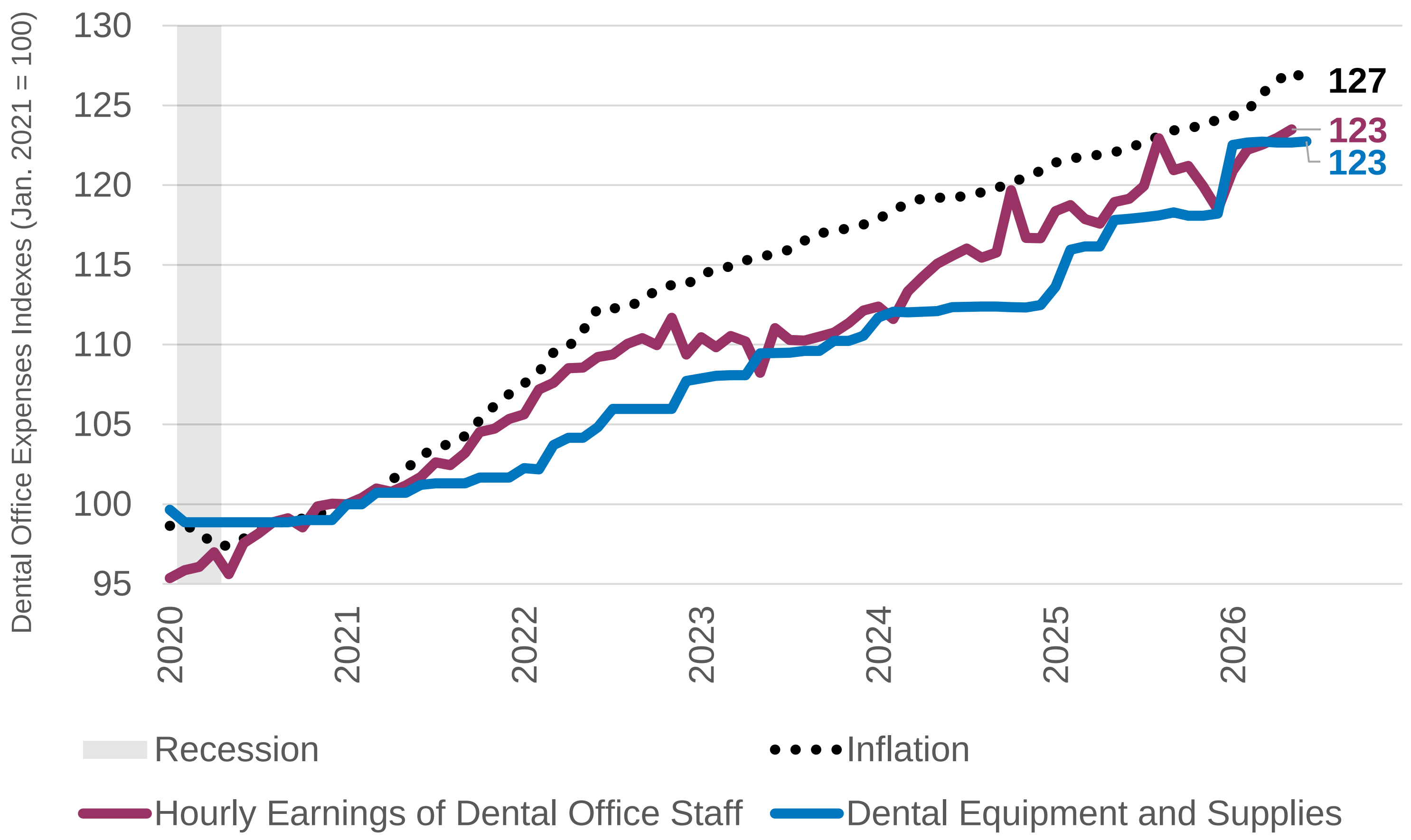
Dental Practice Expense Price Index Increasing



Since January 2021, prices for dental equipment and supplies increased by 23%. Hourly earnings of dental office staff also increased by 23%. During this period, overall inflation has been 27%.

From January through June of this year, prices for dental equipment and supplies increased by 0.2%. Hourly earnings of dental office staff increased by 2.2%. During the same period, overall inflation has been 1.8%.

Source: U.S. Bureau of Labor Statistics

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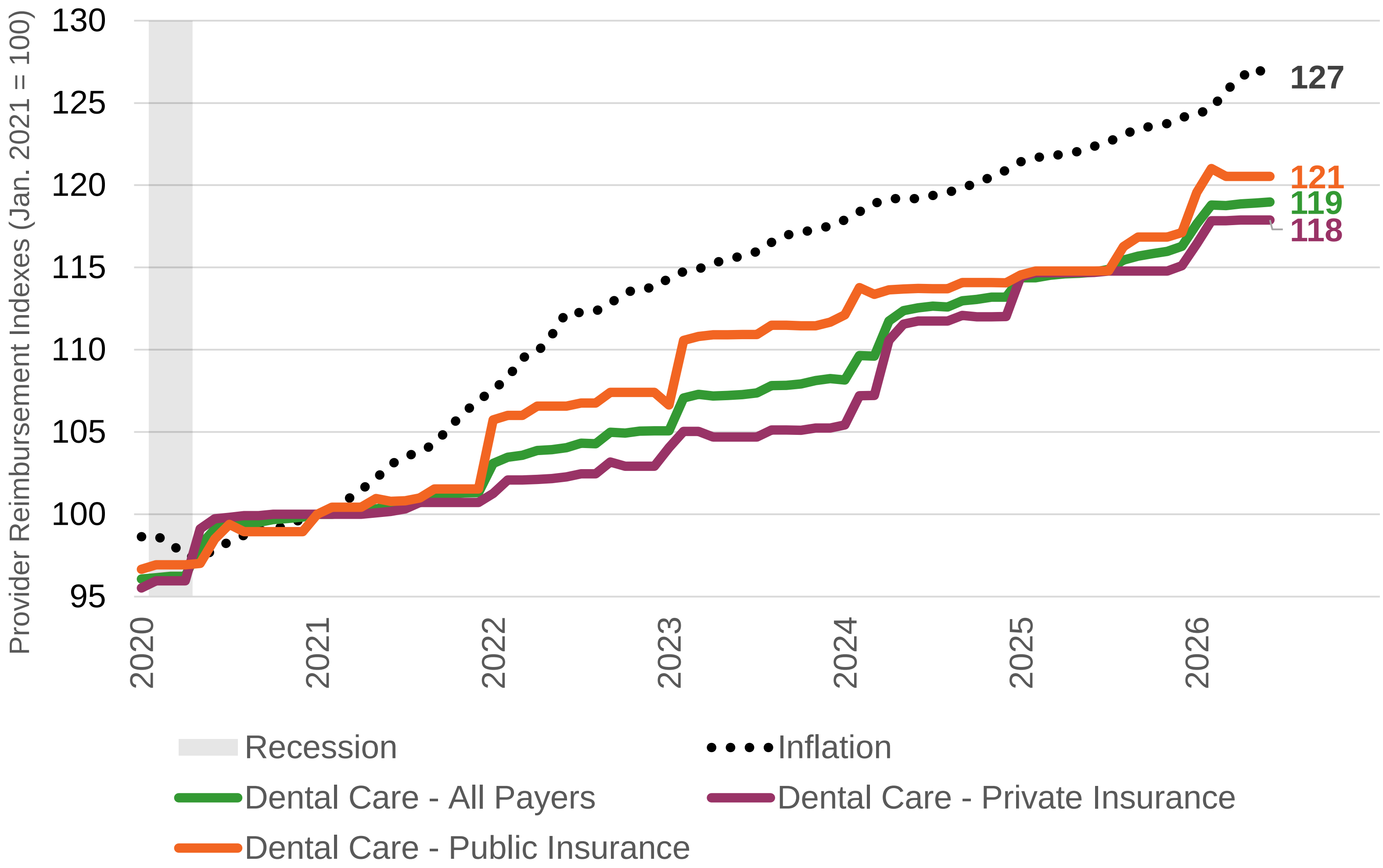
Reimbursement Rate Index Lagging Inflation

Since January 2021, the reimbursement rate index, averaged across all payer types, increased by 19% while inflation was 27% over this time frame.

From January through June of this year, the index has increased by 1.1% while inflation was at 1.8%.



Source: U.S. Bureau of Labor Statistics

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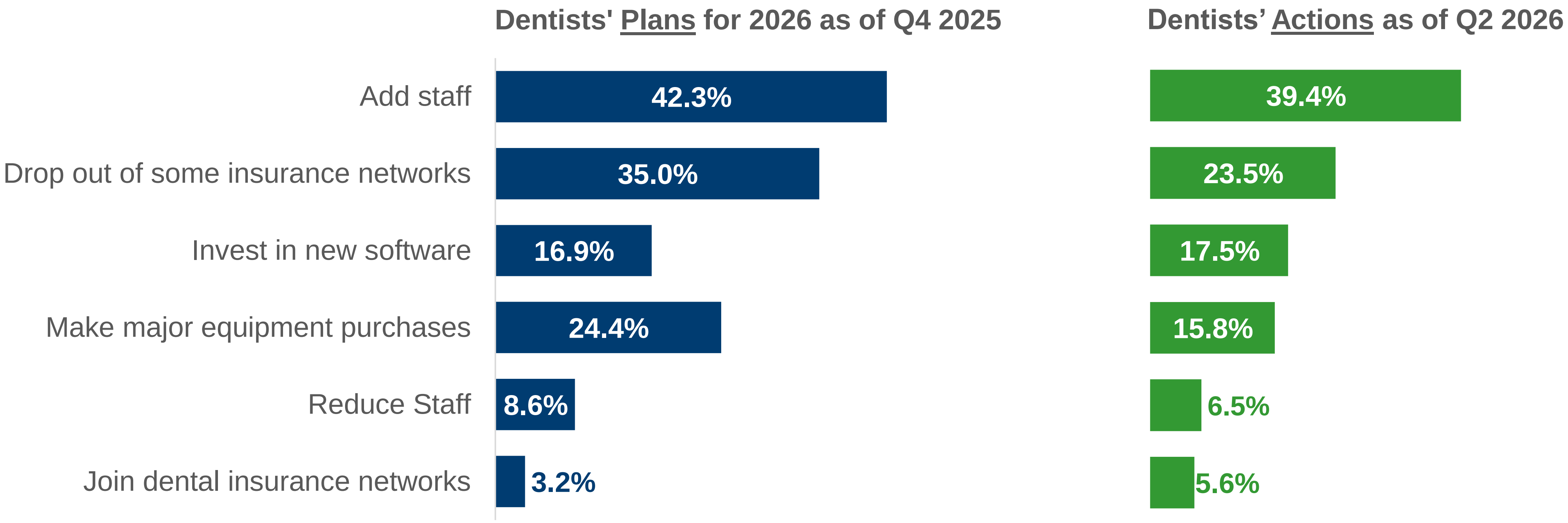
Dentists’ Intentions vs. Actions in 2026



In Q4 2025, dentists were asked about **their plans for 2026**. We asked them in Q2 2026 whether they **had taken action** on any of these plans. In Q2 2026, dentists are moving towards their plans for the year and have already surpassed their intentions for new software investments and joining insurance networks.

Source: ADA Health Policy Institute

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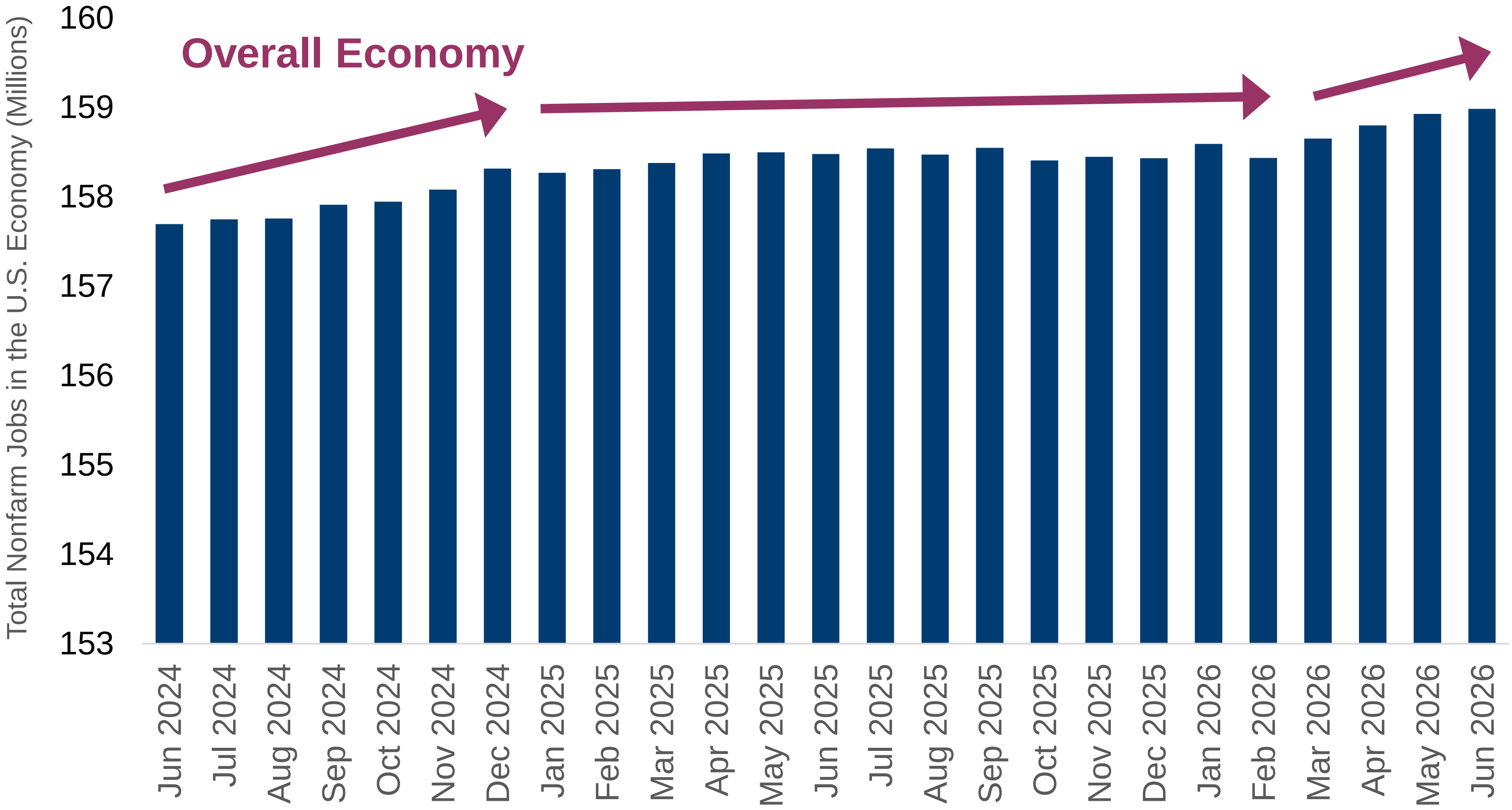
Dental
Jobs Market

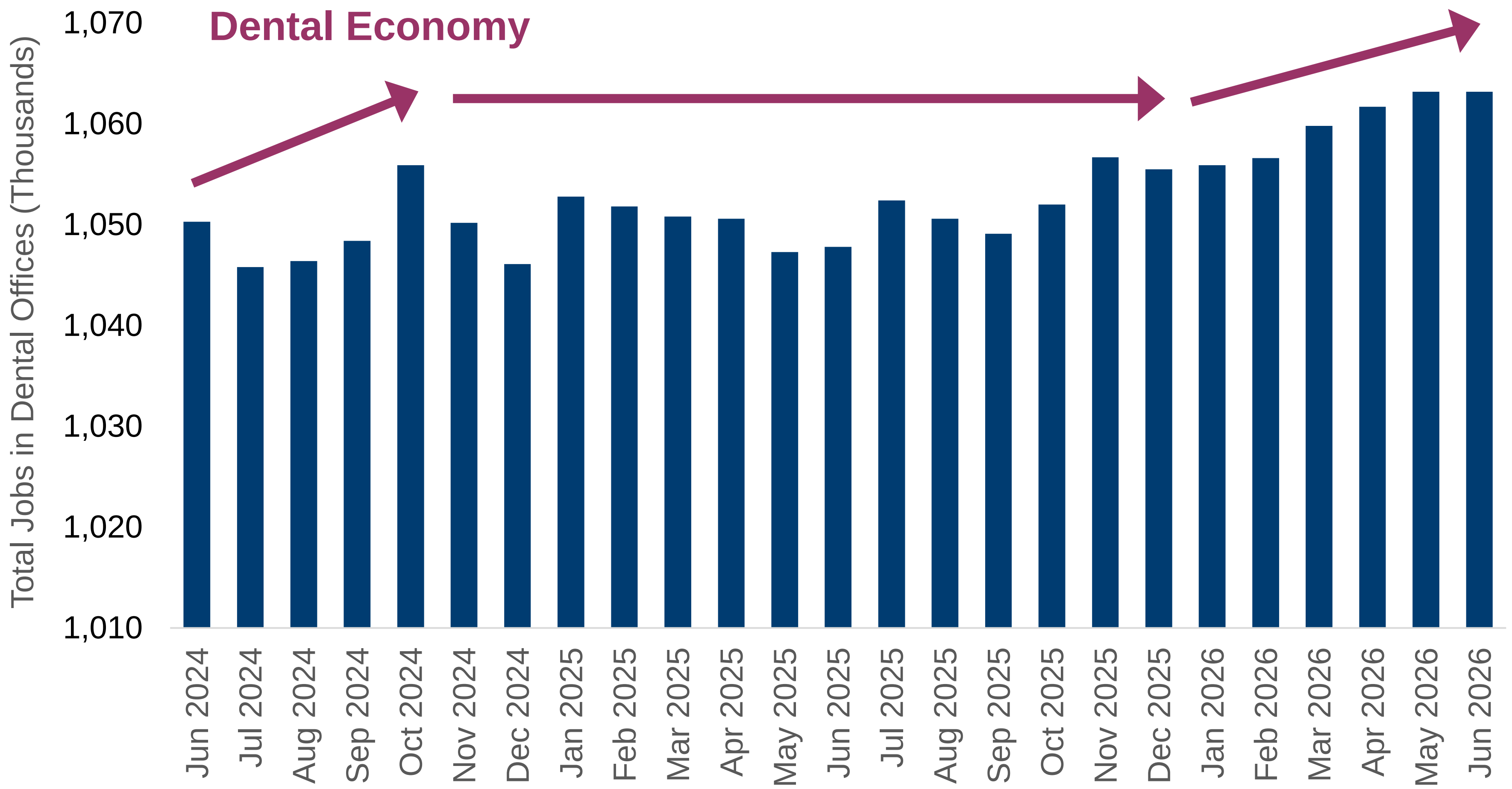
U.S. Economy Adding Jobs at Faster Pace in 2026



Job growth accelerated in the U.S. economy after February 2026; 57,000 jobs were added in June 2026.

Source: U.S. Bureau of Labor Statistics

Dental Sector Employment Resuming Growth

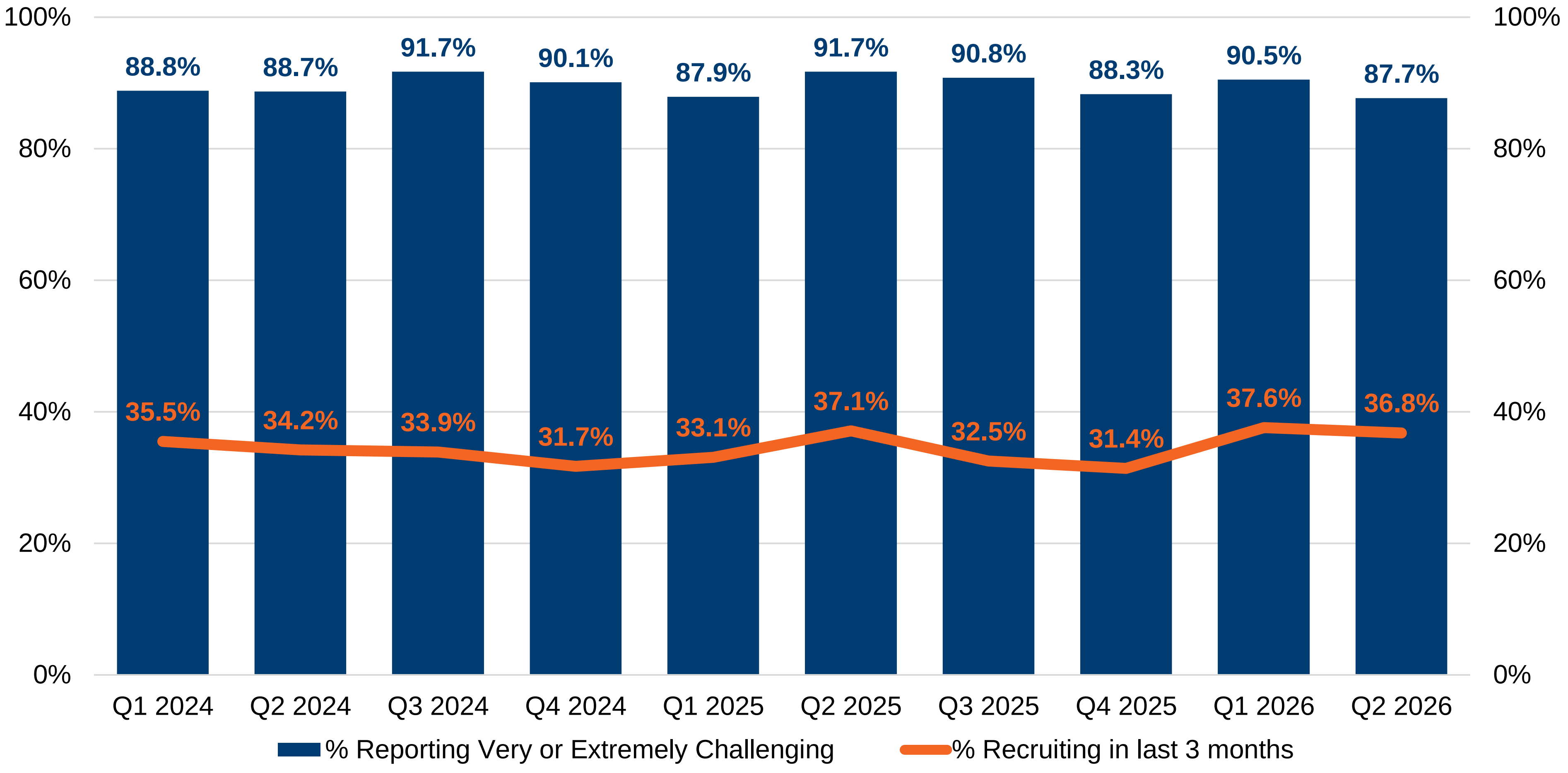


In June 2026, the total number of jobs in dental offices was:

- Unchanged from one month prior
- Up 1.5% over 12 months

Source: U.S. Bureau of Labor Statistics

Dental Hygienists the Hardest to Recruit



Nearly 2 in 5 dentists were recruiting dental hygienists in Q2 2026. Among these dentists, the vast majority report recruiting hygienists is “very” or “extremely challenging.” This trend has been consistent over the last two years.

Source: ADA Health Policy Institute

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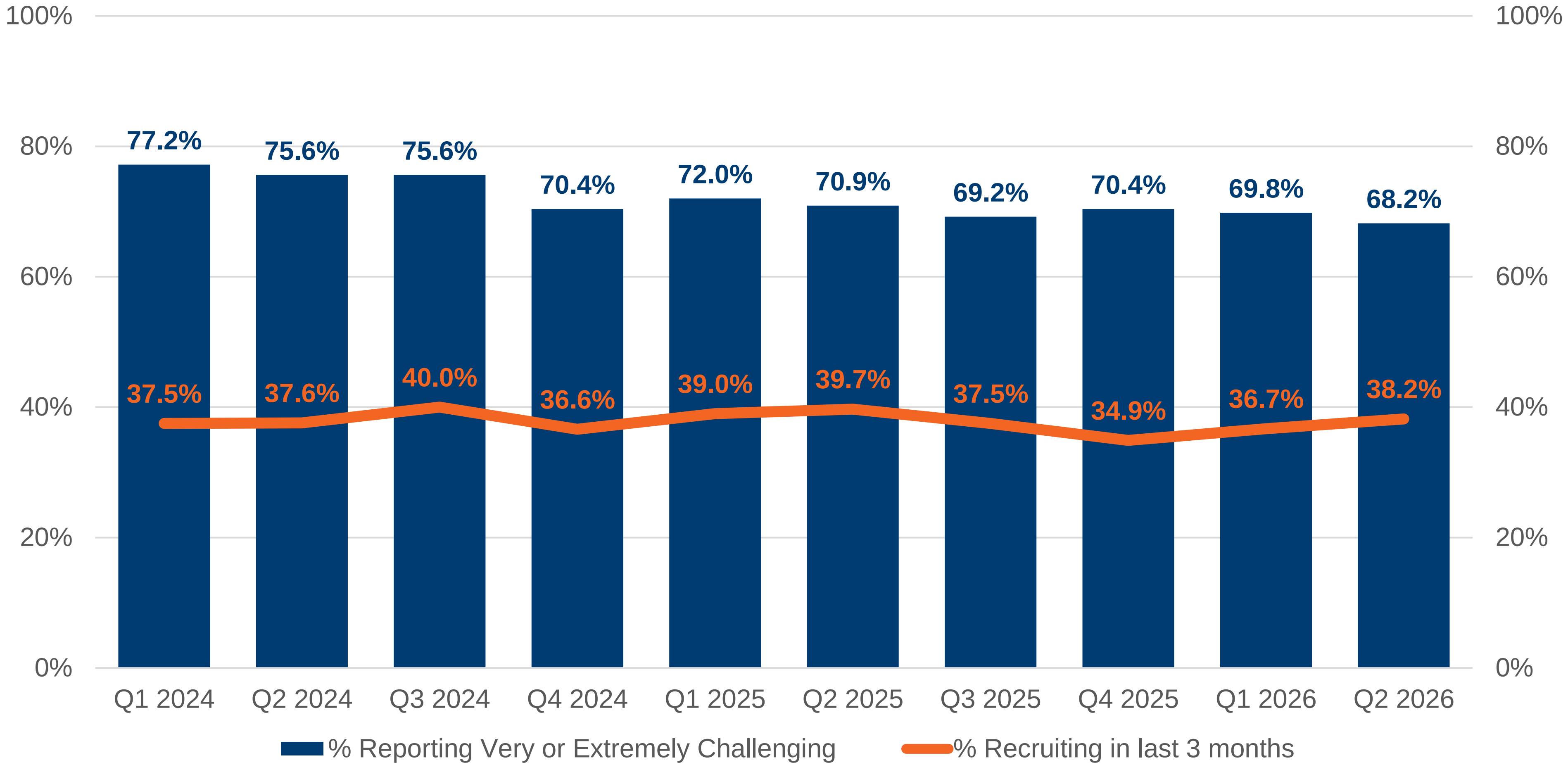
Dental Assistants Slightly Less Difficult to Recruit



Over the last two years, a slightly higher share of dentists have reported trying to recruit dental assistants compared to hygienists.

However, dentists' perceived difficulty of recruiting assistants is lower than for hygienists and is becoming lower over time.

Source: ADA Health Policy Institute

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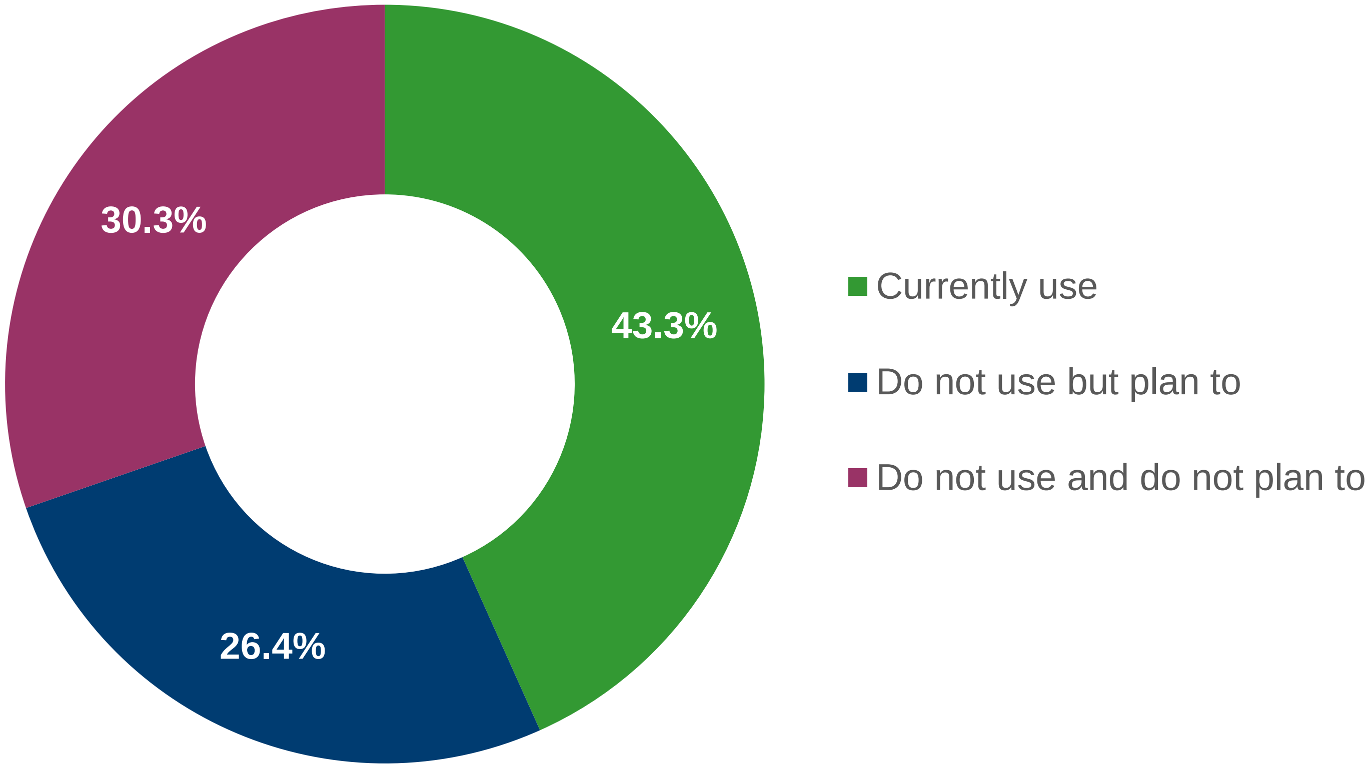
Dentists' AI Usage and Attitudes

Two out of Five Dentists Currently Using AI

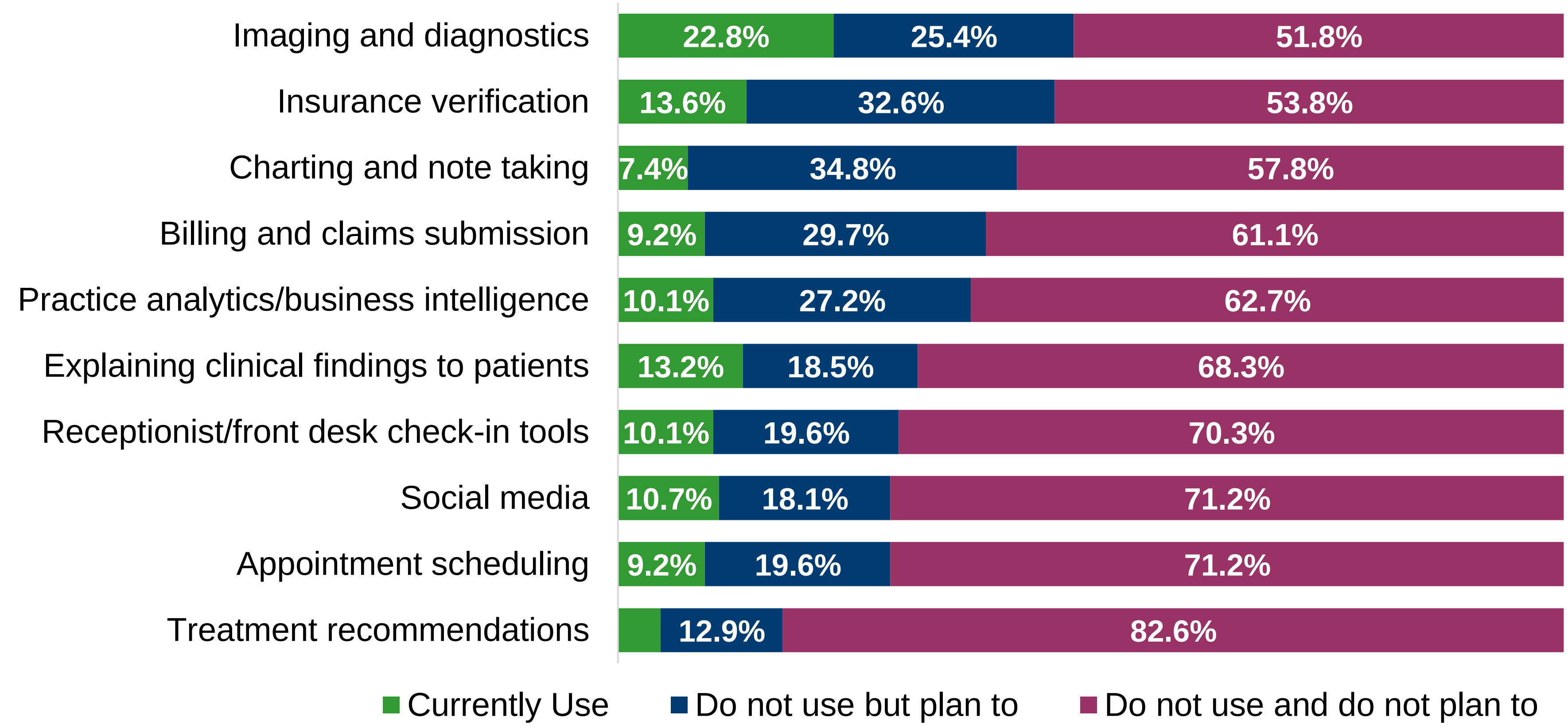


Around two out of five dentists reported that they **currently use AI** for at least one task in their dental practice. Another one-quarter indicate they **plan to use AI in the future,** while three out of ten indicate they **never intend to use AI.**

Source: ADA Health Policy Institute

Top AI Application: Imaging/Diagnostics

For which of the following tasks do you use AI in your practice?



Dentists were more likely to indicate that they currently use or plan to use AI for imaging and diagnostics as well as for administrative tasks related to insurance verification, charting/note taking, and billing and claims submission.

Dentists were least open to AI use for treatment recommendations.

Source: ADA Health Policy Institute

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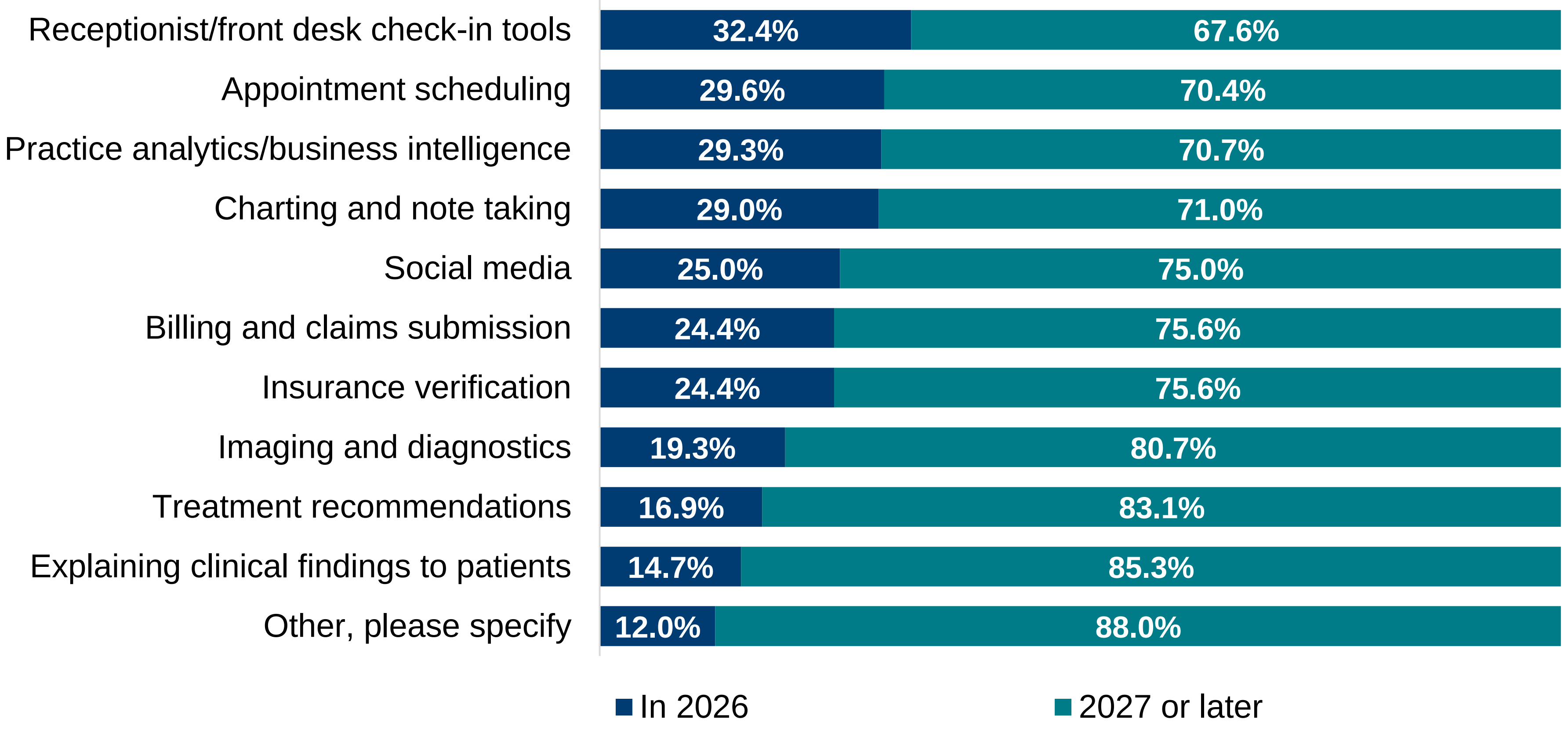
Plans to Start Using AI

***[If do not use but plan to use]* When do you plan to use AI for these tasks?**



Among dentists who said they do not currently use AI but plan to do so, the top intentions for 2026 are front-desk functions such as check-in and appointment scheduling tools, and other administrative activities such as business analytics and charting and note taking.

Source: ADA Health Policy Institute

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Dentists Express Mixed Feelings Around AI Usage

Overall, how do you feel about the expanded use of AI in dentistry?

TOP FIVE REACTIONS

1. Generally optimistic about the potential (21.5%)
2. AI is a tool, should not replace clinical judgement (17.7%)
3. Negative, generally opposed (13.8%)
4. Skeptical/nervous (9.9%)
5. Mixed feelings (9.7%)

Source: ADA Health Policy Institute

Dentists Express Mixed Feelings Around AI Usage

WHAT DENTISTS ARE SAYING…

“AI is a fantastic tool if used responsibly, it should be an aid to a job, not the only source of competency. The operator should always be the one in command of the outcome.”

“Can be good if you use it discerningly and apply critical thinking.”

“I think it will ultimately make some tasks easier, but I think the diagnostic side needs a lot of improvements before it's clinically acceptable. ”

“I'm excited about what it could do for dentistry.”

“Somewhat skeptical. Our current radiograph AI is consistently wrong.”

"I am not a fan of AI in any setting.”

Source: ADA Health Policy Institute

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Key Takeaways for Q2 2026

Key Takeaways – the Dental Economy

Dentists' economic confidence is up. In Q2 2026, dentists' confidence in their own practice, the dental sector, and the U.S. economy went up from Q1 2026, continuing a trend of slight recovery following a surge and crash in confidence in late 2024 and early 2025. When asked why they were confident in the dental sector, dentists cited their belief that dentistry is always needed and that they were observing high demand from patients. U.S. consumers, meanwhile, are less confident in the U.S. economy over time.

Dentists are busier, even though dental spending is growing only very modestly. Consumer spending on dental care is up only 1% over the last 12 months. But in Q2 2026, dentists reported being busier and appointment wait times were up. It could be that aggregate dental spending does not translate directly into dentist busyness and appointment wait times. It could be that patient traffic is increasing, but for relatively low-value services. It could be dentists are working harder for the same revenue. This merits further analysis.

Key Takeaways – the Dental Economy

The 'fiscal squeeze' continues. Over the past five years, prices for dental equipment and supplies as well as wages of dental staff have gone up 23% while reimbursement averaged across all payor types has only gone up 19%. This has brought pressure to the bottom line for dental practices. The most recent data show this trend continuing. From January through June of this year, for example, wage increases for dental staff have outpaced inflation while reimbursement continues to lag inflation. The fiscal squeeze continues.

Total employment in the dental sector is slowly resuming growth. The number of jobs in the dental sector has grown 1.5% over the last 12 months after two years of stagnation. This could be early signs that staffing issues are easing but too soon for any definitive conclusion.

Key Takeaways – AI in Dental Practices

Dentists are definitely using AI. Currently, 43% of dentists use AI for some type of task in their dental practice, most commonly for imaging/diagnostics applications.

Dentists have mixed feelings about AI in dentistry. Around one out of five dentists believe AI is a helpful tool, while skeptical dentists expressed concerns about AI inaccuracies and its potential to lead to misdiagnoses and overtreatment.

Dentists are very hesitant of AI applied to treatment recommendations. Four out of five dentists said they have no interest in using AI for patient treatment recommendations. In comments, dentists stressed the importance of clinical judgement and human verification in treatment decisions.

Dentists see opportunities for future AI use. One-quarter of dentists said they plan to use AI in the future. The tasks dentists are most likely to implement AI for are administrative: reception/front desk check-in, appointment scheduling, practice analytics, charting and notetaking.

Thank you!

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Data Sources and Methods

Data Sources and Methods

Dentists' Economic Confidence

- **Slide 5**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q2 2026. Unpublished data. Based on 552 responses from dentists in private practice.

  Notes: Data represent the combined share of dentists responding, "somewhat confident" or "very confident" to "Looking ahead the next 6 months, how confident are you in the economic conditions in… (1) your particular dental practice, (2) the dental care sector, and (3) the U.S. economy."

- **Slide 6**

  Source: University of Michigan. Index of Consumer Sentiment. Available at https://www.sca.isr.umich.edu/tables.html. Accessed July 6, 2026.

  Notes: The index represents consumer sentiment relative to a value of 100 representing Q1 1966. A value above 100 indicates optimism relative to the first quarter of 1966. A value below 100 indicates pessimism relative to 1966.

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Data Sources and Methods

Dentists’ Economic Confidence

- **Slides 7 to 10**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q2 2026. Unpublished data. Based on 552 responses from dentists in private practice.

  Notes for 8 and 10: Data represent a summary of open-ended responses to question, “Please briefly describe the reasons for your skepticism/confidence in the dental care sector.”

  Notes for Slide 7 and 9: Data represent a summary of open-ended responses to question, “Please briefly describe the reasons for your skepticism/confidence in the dental care sector in general,” as well as select verbatim quotes provided by respondents to illustrate the top reasons.

Data Sources and Methods

Consumer Dental Spending

- **Slide 12**

  Sources: U.S. Bureau of Economic Analysis, Table 2.4.6U, Real Personal Consumption Expenditures, Dental Services, Chained Dollars [Billions of chained (2017) dollars]. Table 2.4.5U, Personal Consumption Expenditures, Dental Services [Billions of current dollars]. Months are seasonally adjusted at annual rates. Available at https://www.bea.gov/data/consumer-spending/main, accessed June 25, 2026.

  Federal Reserve Bank of St. Louis, NBER based Recession Indicators for the United States from the Peak through the Trough [USRECM], retrieved from FRED, Federal Reserve Bank of St. Louis. Available at https://fred.stlouisfed.org/series/USRECM, accessed June 25, 2026.

  Notes: The Bureau of Economic Analysis (BEA) releases monthly estimates of consumer spending for dental services. Each month's spending amount is annualized, i.e., presented as the amount of spending that would occur in a year, based on that month's rate of spending. This graph represents inflation-adjusted spending in terms of 2026 dollars.

Data Sources and Methods

Consumer Dental Spending

- **Slide 13**

  Sources: U.S. Bureau of Economic Analysis, Table 2.4.6U, Real Personal Consumption Expenditures, Health Care, Physician Services, Dental Services, Chained Dollars [Billions of chained (2017) dollars]. Table 2.4.5U, Personal Consumption Expenditures, Health Care, Physician Services, Dental Services [Billions of current dollars]. Months are seasonally adjusted at annual rates. Available at https://www.bea.gov/data/consumer-spending/main, accessed June 25, 2026.

  U.S. Bureau of Economic Analysis, Population [POPTHM], retrieved from FRED, Federal Reserve Bank of St. Louis. Available at https://fred.stlouisfed.org/series/POPTHM, accessed June 25, 2026.

  Federal Reserve Bank of St. Louis, NBER based Recession Indicators for the United States from the Peak through the Trough [USRECM], retrieved from FRED, Federal Reserve Bank of St. Louis. Available at https://fred.stlouisfed.org/series/USRECM, accessed June 25, 2026.

  Notes: These indexes measure the change over time in spending relative to January 2016. An index value of 101 would indicate spending 1% higher than the spending level in January 2016.

Data Sources and Methods

Dental Practice Economics

- **Slides 15-16**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q2 2026. Unpublished data. Based on 552 responses from dentists in private practice.

  Notes for Slide 15: Data represent a summary of answers to question, “Which of the following best describe your general busyness level over the last 3 months?”

  Notes for Slide 16: Data represent a summary of answers from owner dentists to the question, “[If accepting new patients] Currently, how many business days does the average new patient have to wait for an initial appointment (excluding emergencies)?" Respondents of this question had previously answered "Yes" to the question, "Is your practice currently accepting new patients?“

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Data Sources and Methods

Dental Practice Economics

- **Slide 17**

  Sources: U.S. Bureau of Labor Statistics, Current Employment Statistics, Average hourly earnings of production and nonsupervisory employees, offices of dentists, seasonally adjusted. Available at https://www.bls.gov/ces/data/. Accessed May 13, 2026.

  U.S. Bureau of Labor Statistics, Producer Price Index by Commodity: Miscellaneous Products: Professional Dental Equipment and Supplies (WPU156501071), not seasonally adjusted. Available at https://www.bls.gov/ppi/databases/. Accessed May 13, 2026.

  U.S. Bureau of Labor Statistics (BLS), Consumer Price Index (CPI-U), All Items, seasonally adjusted. Available at https://www.bls.gov/cpi/data.htm. Accessed May 13, 2026.

  Federal Reserve Bank of St. Louis, NBER based Recession Indicators for the United States from the Peak through the Trough [USRECM], retrieved from FRED, Federal Reserve Bank of St. Louis. Available at https://fred.stlouisfed.org/series/USRECM, accessed May 13, 2026.

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Data Sources and Methods

Dental Practice Economics

- **Slide 17 (continued)**

  Notes: “Hourly Earnings of Dental Office Staff” is the label for the index of average hourly earnings of production and nonsupervisory employees in offices of dentists. Average earnings are a measure of gross payrolls divided by total hours worked. The index for Dental Equipment and Supplies reflects the change in prices received by domestic producers of those products.

Data Sources and Methods

Dental Practice Economics

- **Slide 18**

  Sources: U.S. Bureau of Labor Statistics (BLS), Producer Price Index by Commodity, PPI Commodity data for Health care services-Dental care, seasonally adjusted. Available at https://www.bls.gov/ppi/databases/. Accessed June 12, 2026.

  U.S. Bureau of Labor Statistics (BLS), Consumer Price Index (CPI-U), All Items, seasonally adjusted. Available at https://www.bls.gov/cpi/data.htm. Accessed June 12, 2026.

  Federal Reserve Bank of St. Louis, NBER based Recession Indicators for the United States from the Peak through the Trough [USRECM], retrieved from FRED, Federal Reserve Bank of St. Louis. Available at https://fred.stlouisfed.org/series/USRECM, accessed June 12, 2026.

  Notes: These indexes measure the average change over time in prices received by domestic health care providers. Prices collected for the Producer Price Index reflect the total amounts received by providers for rendering services to patients. The index for Dental Care measures change in the reimbursement amount dentists receive per visit for a representative snapshot of dental service delivery. Includes payments from patients, private insurance, Medicaid, Medicare, and other payers.

Data Sources and Methods

Dental Practice Economics

- **Slide 19**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q4 2025 and Q2 2026. Unpublished data. Based on 552 responses from dentists in private practice.

  Notes: Data for the graph Dentists' Plans for 2026 as of Q4 2025 represent owner dentist responses to the question, "Looking ahead to 2026, how likely are you to do each of the following for your practice?" Responses include dentists who selected “very likely” or “somewhat likely.” Data for the graph Dentists' Actions so far in 2026 as of Q2 2026 represent owner dentist responses to the question, "Since the beginning of 2026, have you done any of the following in your practice?” Responses include dentists who selected “yes.”

Data Sources and Methods

Dental Jobs Market

- **Slide 21**

  Source: U.S. Bureau of Labor Statistics (BLS), Current Employment Statistics. All employees, millions, total nonfarm, seasonally adjusted. Available at https://www.bls.gov/ces/data/. Accessed July 6, 2026.

- **Slide 22**

  Source: U.S. Bureau of Labor Statistics (BLS), Current Employment Statistics. All employees, thousands, offices of dentists, seasonally adjusted. Available at https://www.bls.gov/ces/data/. Accessed July 6, 2026.

Data Sources and Methods

Dental Jobs Market

- **Slides 23-24**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q2 2026. Unpublished data. Based on 552 responses from dentists in private practice.

  Notes: Data represent those choosing the "very challenging" and "extremely challenging" responses to the question, "How challenging has it been to recruit the position(s) below?" Respondents of this question had previously answered "Yes" to the question, "Currently, or at any time during the last 3 months, have you recruited any of the following positions?“

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Data Sources and Methods

Dentists' AI Usage and Attitudes

- **Slides 26-30**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q2 2026. Unpublished data. Based on 552 responses from dentists in private practice.

  Notes for Slide 26: Data represent those responding to the question, "For which of the following tasks do you use AI in your practice?" Data represent dentists who currently use, do not use but plan to use, and do not use and do not plan to use AI for <u>at least one</u> task.

  Notes for Slide 27: Data represent those responding to the question, "For which of the following tasks do you use AI in your practice?"

  Notes for Slide 28: Data represent a summary of those responding to the question, "When do you plan to use AI for these tasks?" Data represent dentists who responded that they "do not use but plan to use" AI for <u>at least one</u> task.

Data Sources and Methods

Dentists' AI Usage and Attitudes

- **Slides 26-30 (continued)**

  Notes for Slide 29: Data represent a summary of open-ended responses to question, "Overall, how do you feel about the expanded use of AI in dentistry?"

  Notes for Slide 30: Data represent a summary of open-ended responses to question, "Overall, how do you feel about the expanded use of AI in dentistry?" as well as select verbatim quotes provided by respondents to illustrate the top reasons.

Data Sources and Methods

About the Economic Outlook and Emerging Issues in Dentistry Survey

- HPI conducts the Economic Outlook and Emerging Issues in Dentistry survey on a quarterly basis, distributing invitations online to panelists in the second half of the last month of each quarter. Each quarterly wave of the survey includes questions that measure core aspects of the economic outlook, and new questions are added each quarter to gauge experiences related to emerging issues of relevance to the dental sector and practicing dentists.
- For Q2 2026, survey invitations were sent June 15 to 2,432 panel dentists; 589 responded for an adjusted response rate of 24.3% (excluding undeliverable email addresses) . Of these, 552 respondents work in private practice (including large group and DSO practices). Results reported here reflect the views and attitudes of these practicing dentists.
- While the panel represents dentists from diverse demographics and practice modalities, when compared to the general population of practicing dentists, this quarter, respondents tended to skew toward dentists who are ADA members, general practitioners, practice owners, working solo or in small groups, mid to late-career, white, and work in urban areas.

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