The State of the U.S. Dental Economy

1st Quarter 2026 Update
Plus: A Closer Look into Staffing Challenges

HPI® Health Policy Institute
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Q1 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 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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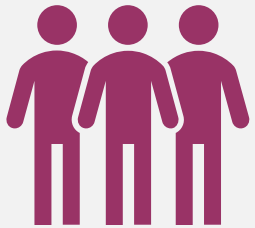
Plus: A Closer Look into Staffing Challenges

This quarter's report also includes valuable insights from dentists on the adequacy of their dental practice staff.



Staff Adequacy

Dentists' perceived adequacy of dental hygienists, dental assistants, and administrative staff in their practice.

Employee Benefits

Dentists' offerings of employee benefits such as health insurance and paid time off and how this varies by staffing adequacy.

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Dentists' Economic Confidence

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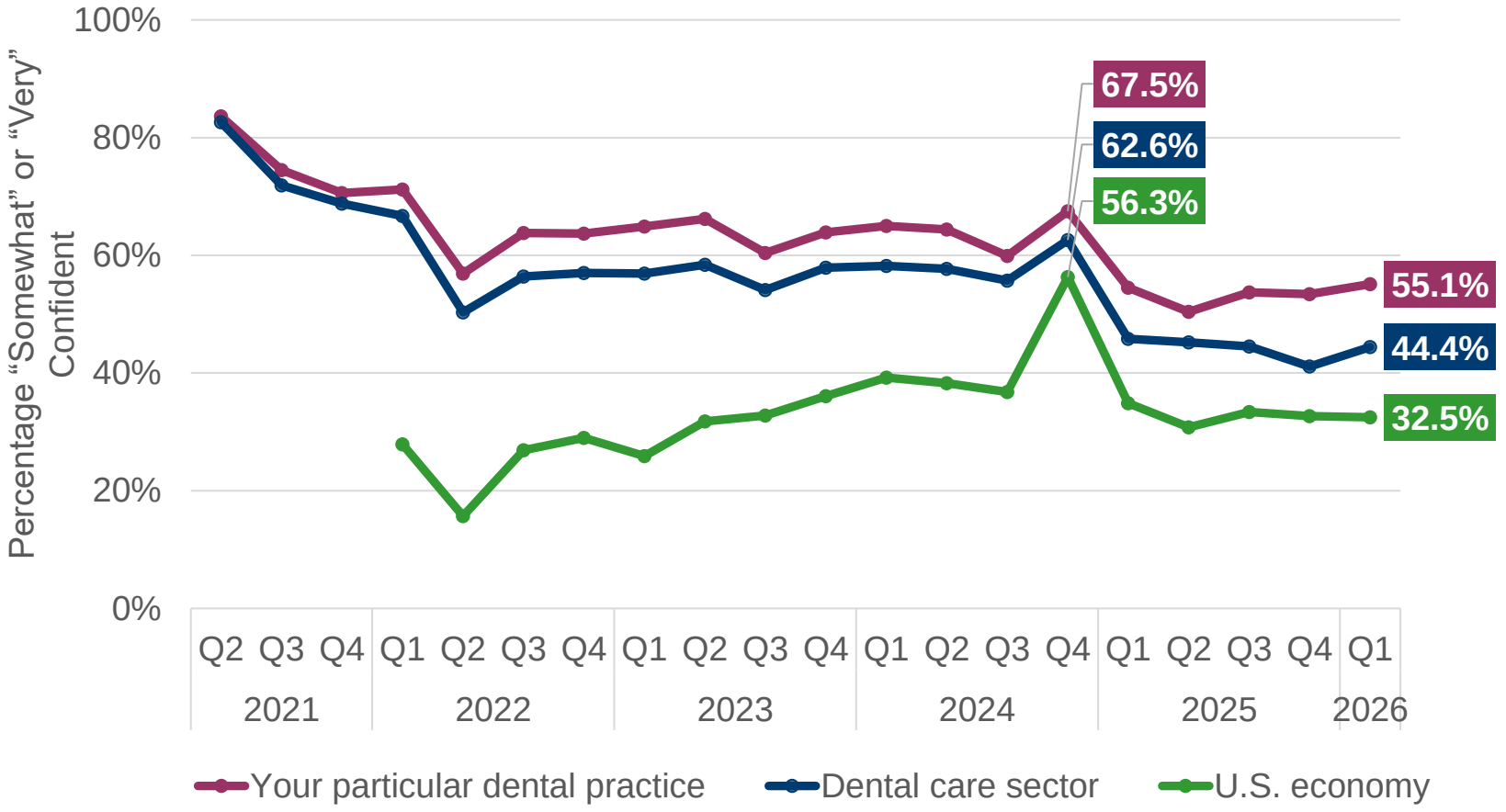
Dentists' Economic Confidence Steady



In Q1 2026, dentists' confidence **in their own practice** and the **dental sector** is up slightly compared to Q4 2025. Confidence in the **overall U.S. economy**, meanwhile, remains virtually unchanged.

Dentists' economic confidence has been stable since early 2025 after dropping from a surge in late 2024. The stability can be seen for all three sectors.

Source: ADA Health Policy Institute

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

More dentists are confident than are skeptical in the dental care sector. These are the top reasons for this rating among dentists who are confident about the U.S. economy in Q1 2026.

44.4%
Share of Dentists Confident about the Dental Care Sector in Q1 2026

TOP FIVE REASONS FOR CONFIDENCE

1. Dentistry is always needed (33.3%)
2. Strong demand, practice busyness (31.6%)
3. Economic resilience of dental sector (11.0%)
4. Positive economic outlook in general (7.4%)
5. Patient demand exceeds supply of dentists in the area (7.1%)

Source: ADA Health Policy Institute

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

WHAT DENTISTS ARE SAYING…

"There is always a need for dental care as long as people have teeth."

"In my area, it seems like there are more patients and less dentists."

"People need dentistry done – even if they aren't doing elective cases, there will always be a need."

""Even when the economy is bad… people still need care."

"In my 20 years in practice… generally always stayed stable."

"We have been very busy."

Source: ADA Health Policy Institute

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

More dentists are confident than are skeptical in the dental care sector. These are the top reasons for this rating among dentists who are skeptical about the U.S. economy in Q1 2026.

29.1%
Share of Dentists Skeptical about the Dental Care Sector in Q1 2026

TOP FIVE REASONS FOR SKEPTICISM

1. Low reimbursement, insurance pressures (36.3%)
2. Rising practice costs, inflation (30.5%)
3. U.S. economic downturn (21.5%)
4. Staffing shortages (11.7%)
5. Uncertainty due to current administration or war (11.2%)

Source: ADA Health Policy Institute

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

WHAT DENTISTS ARE SAYING…

"Supplies and dental materials are either unavailable or much more expensive. The tariffs are killing our practice…"

"The economy is changing. The Iranian War has affected prices that were already affected by tariffs."

"Managed care/dental insurance reimbursement rates are downright abysmal."

"When general economy suffers, generally, so does dentistry. People tend to consider dentistry elective despite our best efforts."

"Patients will NOT pay for teeth if they can't buy gas and groceries."

"I already see the production falling. Patients with uncertainty hesitate to treat even routine procedures."

Source: ADA Health Policy Institute

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Consumer Dental Spending

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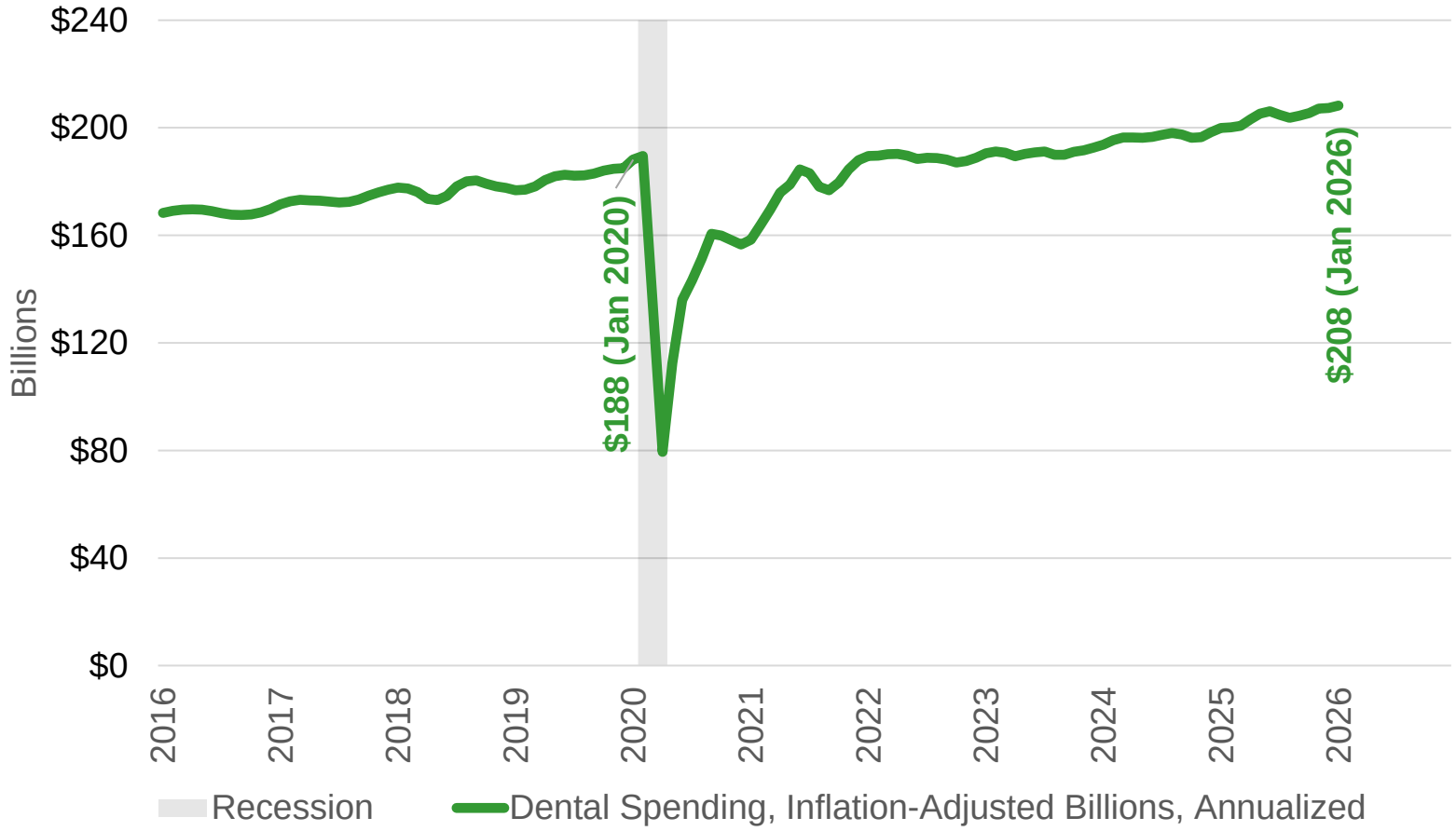
Consumer Dental Spending Rising Gradually



In January 2026, consumer dental spending was **up**:

- 0.4% from month prior
- 0.4% year-to-date
- 4% from 12 months prior
- 11% from pre-pandemic

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

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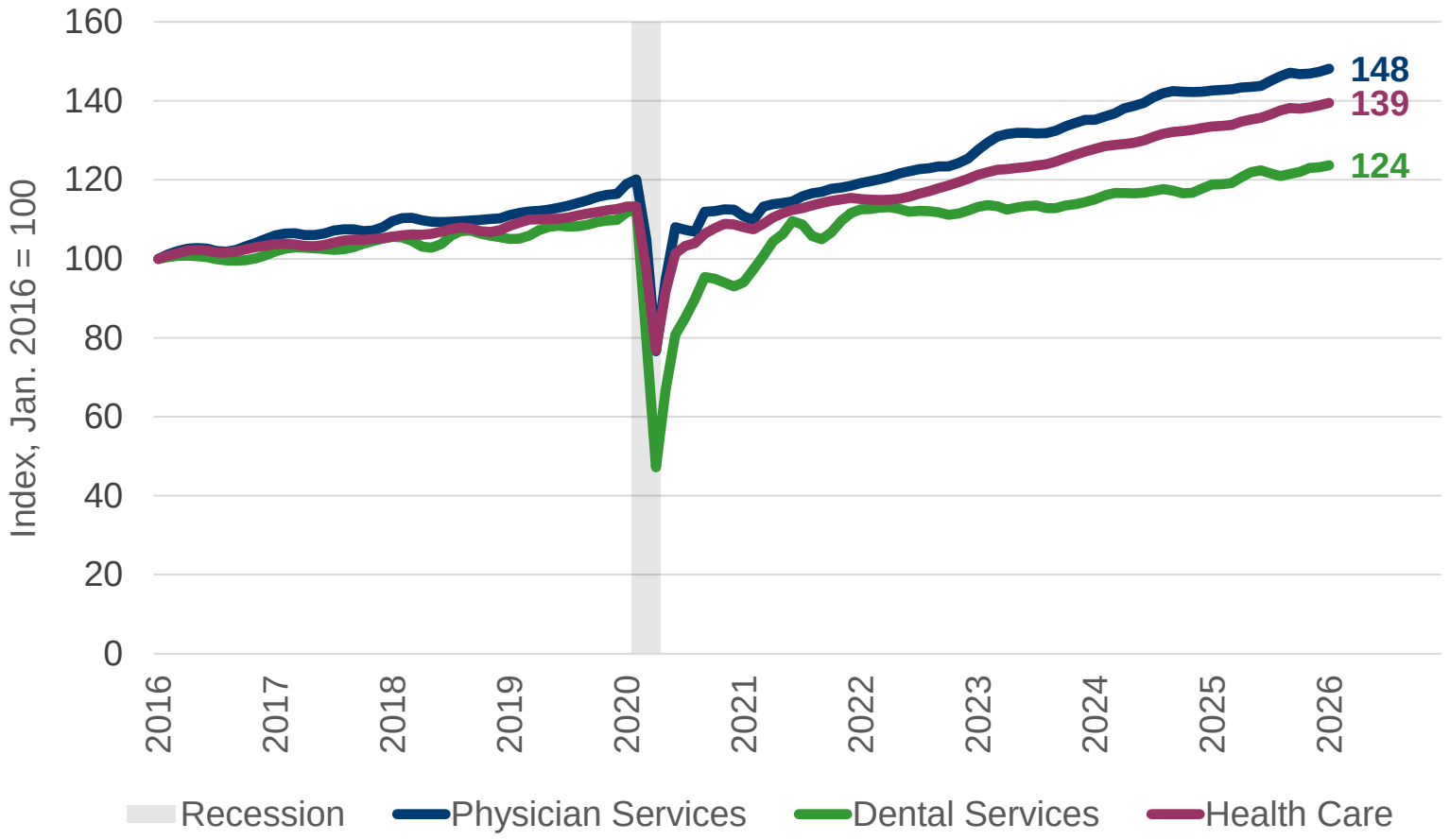
Dental Spending Lags Health Care Spending



Consumer dental spending continues to lag health care spending overall.

Over 10 years, consumer spending on:

- **physician services** is up by 48%
- **health care** is up by 39%
- **dental services** is up by 24%

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

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Dental Practice Economics

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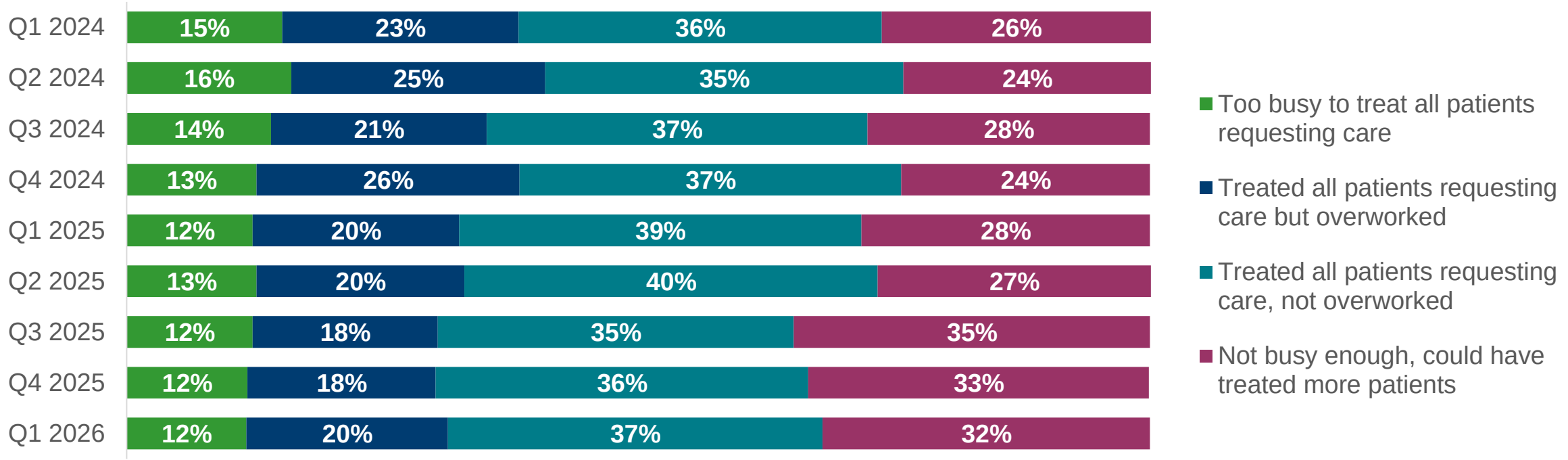
One-Third of Dentists Not Busy Enough



As of Q1 2026, one-third of dentists report they are **not busy enough**. Since early 2024, the overall share of dentists not busy enough has gone up while the shares who are **too busy** and **overworked** have gone down.

Source: ADA Health Policy Institute

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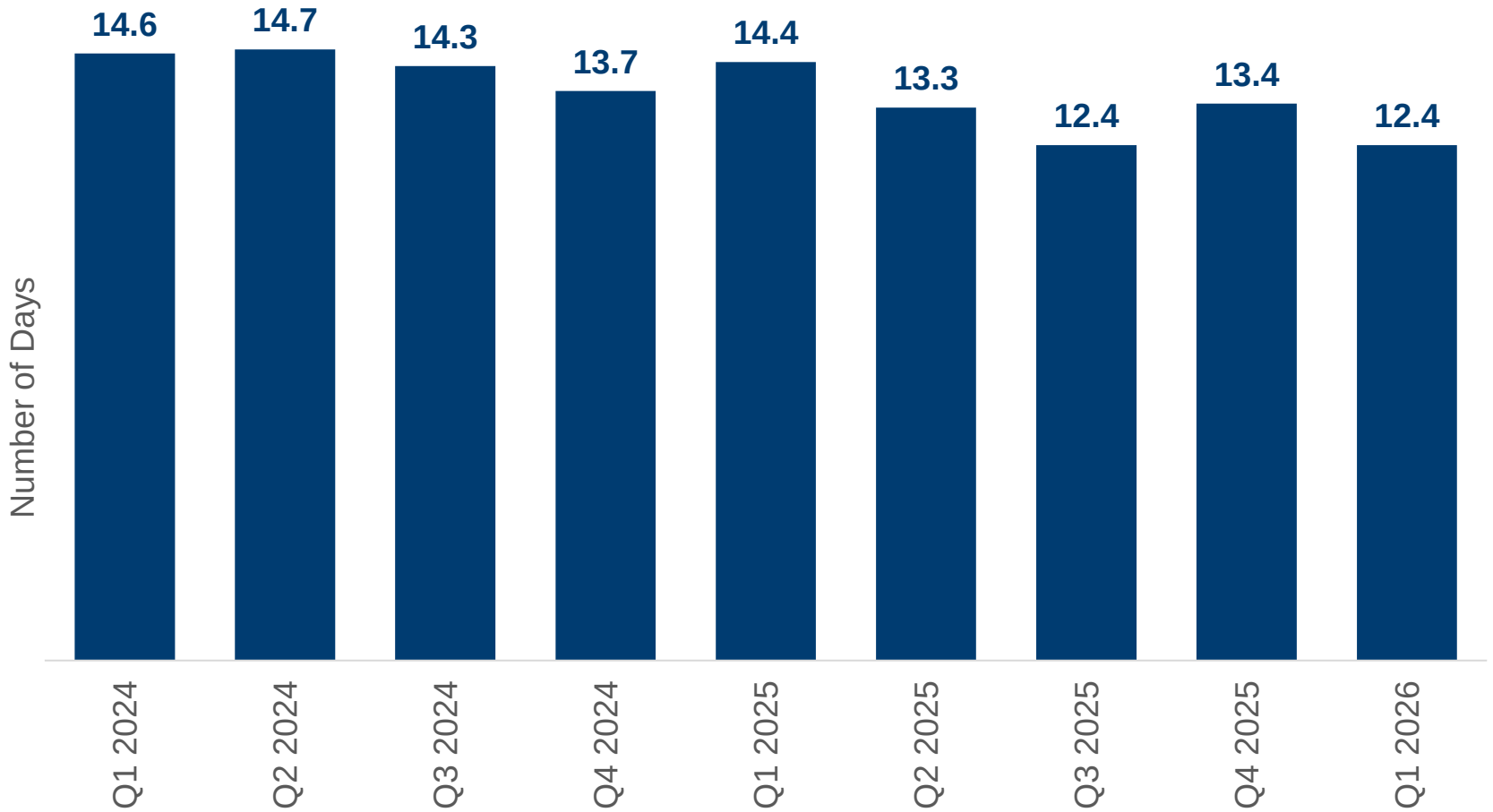
Appointment Wait Times Down



Wait times in Q1 2026 have slightly declined compared to last quarter to an average of 12.4 days.

Appointment wait times for new patients have gone down by approximately two days since Q1 2024.

Source: ADA Health Policy Institute

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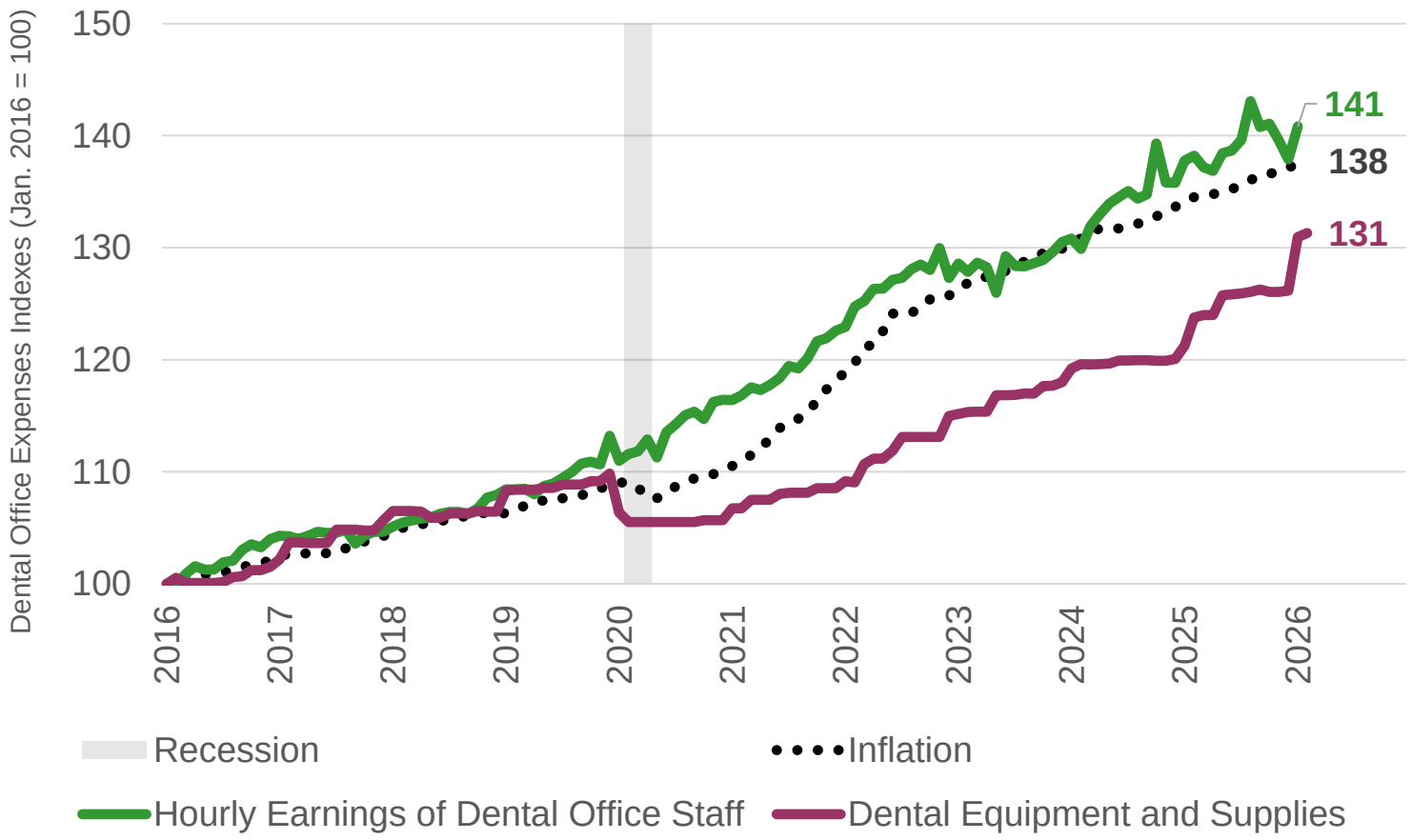
Prices for Dental Practice Expense Items Rising



For the 12 months ending with February 2026, prices for dental equipment and supplies increased by 6%. Hourly earnings of dental office staff increased by 2%.

During the same period, overall inflation was 2%.

Source: U.S. Bureau of Labor Statistics

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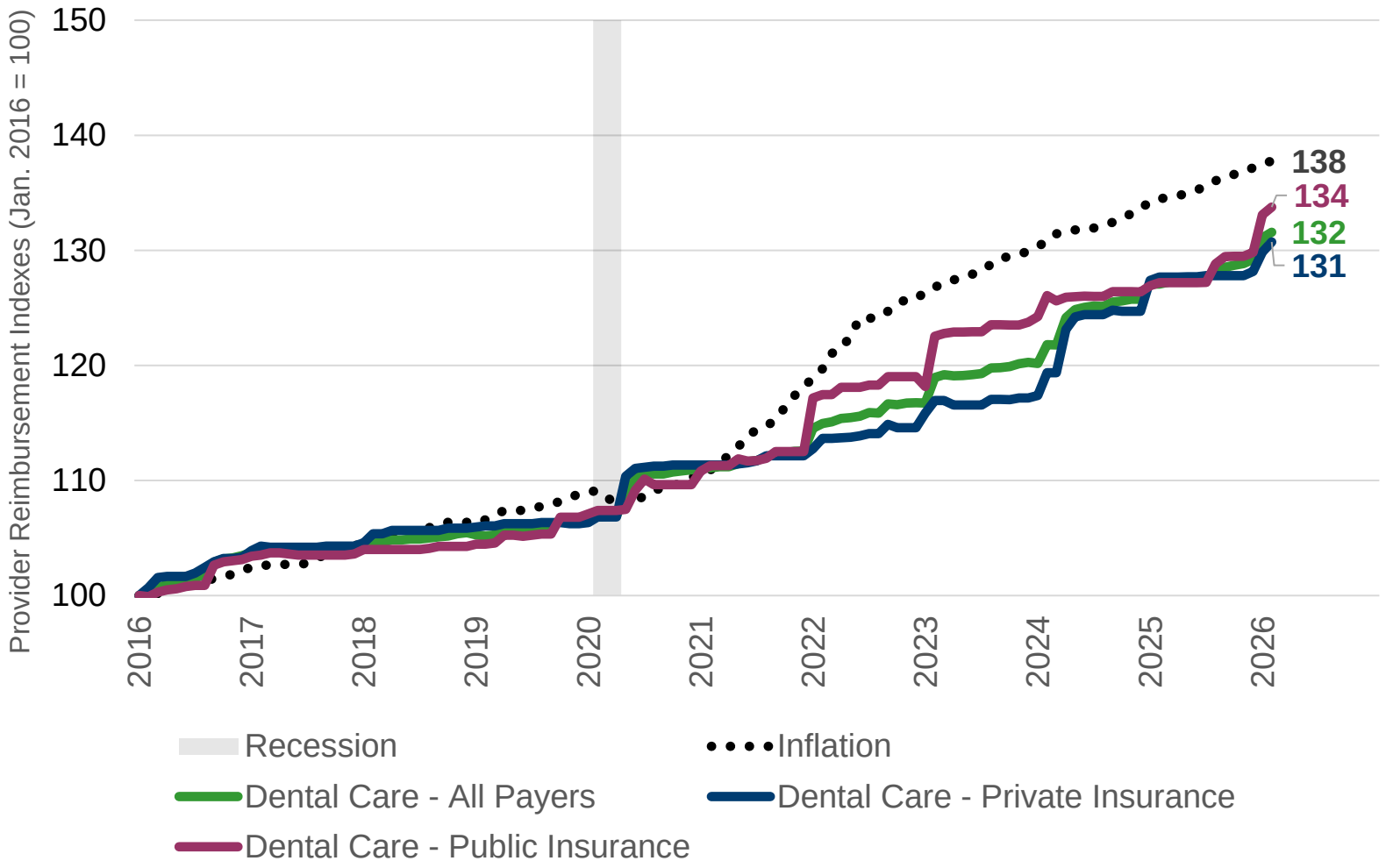
Reimbursement Rates Not Keeping Up with Inflation

In February 2026, provider reimbursement rates in the dental sector increased slightly. However, longer term, they are not keeping pace with overall inflation and certainly not with practice expenses. These trends are putting a significant “fiscal squeeze” on dental practices.



Source: U.S. Bureau of Labor Statistics

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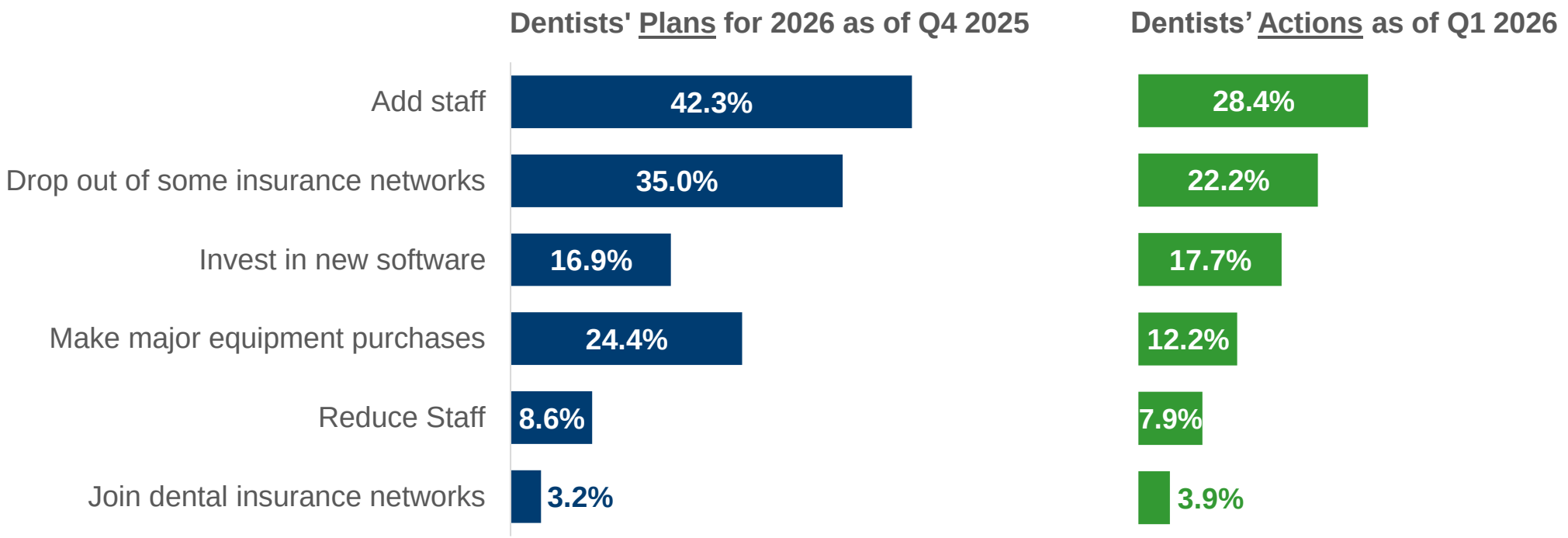
Dentists' Intentions vs. Actions in 2026



In Q4 2025, dentists were asked about **their plans for 2026**. We asked them in Q1 2026 whether they **had taken action** on any of these plans. In Q1 2026, dentists are moving towards their plans for the year and have already surpassed their intentions for new software investments.

Source: ADA Health Policy Institute

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Dental Jobs Market

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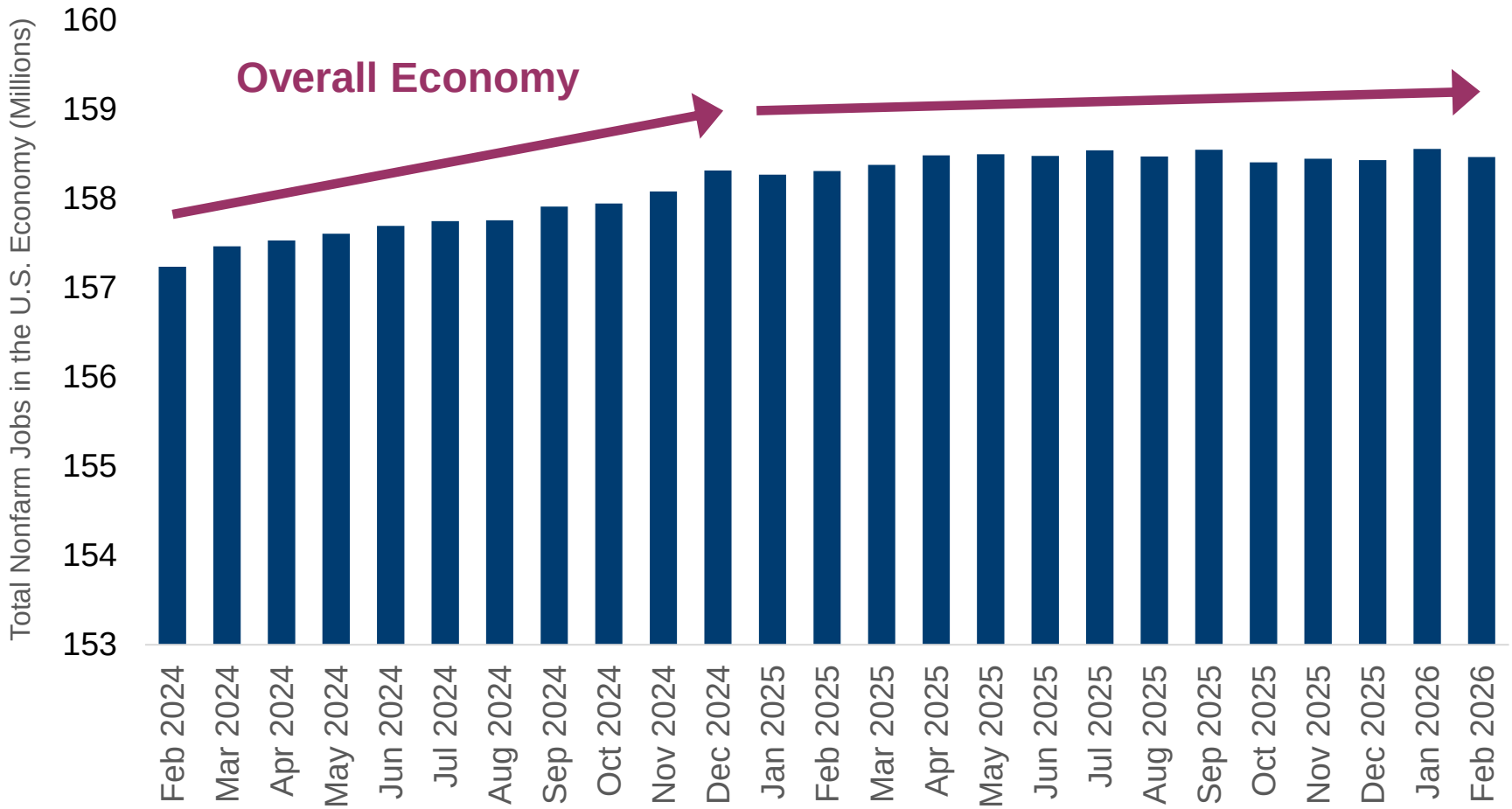
U.S. Economy Adding Jobs at Slower Pace



Job growth slowed in the U.S. economy after December 2024; 92,000 jobs were lost in February 2026.

Source: U.S. Bureau of Labor Statistics

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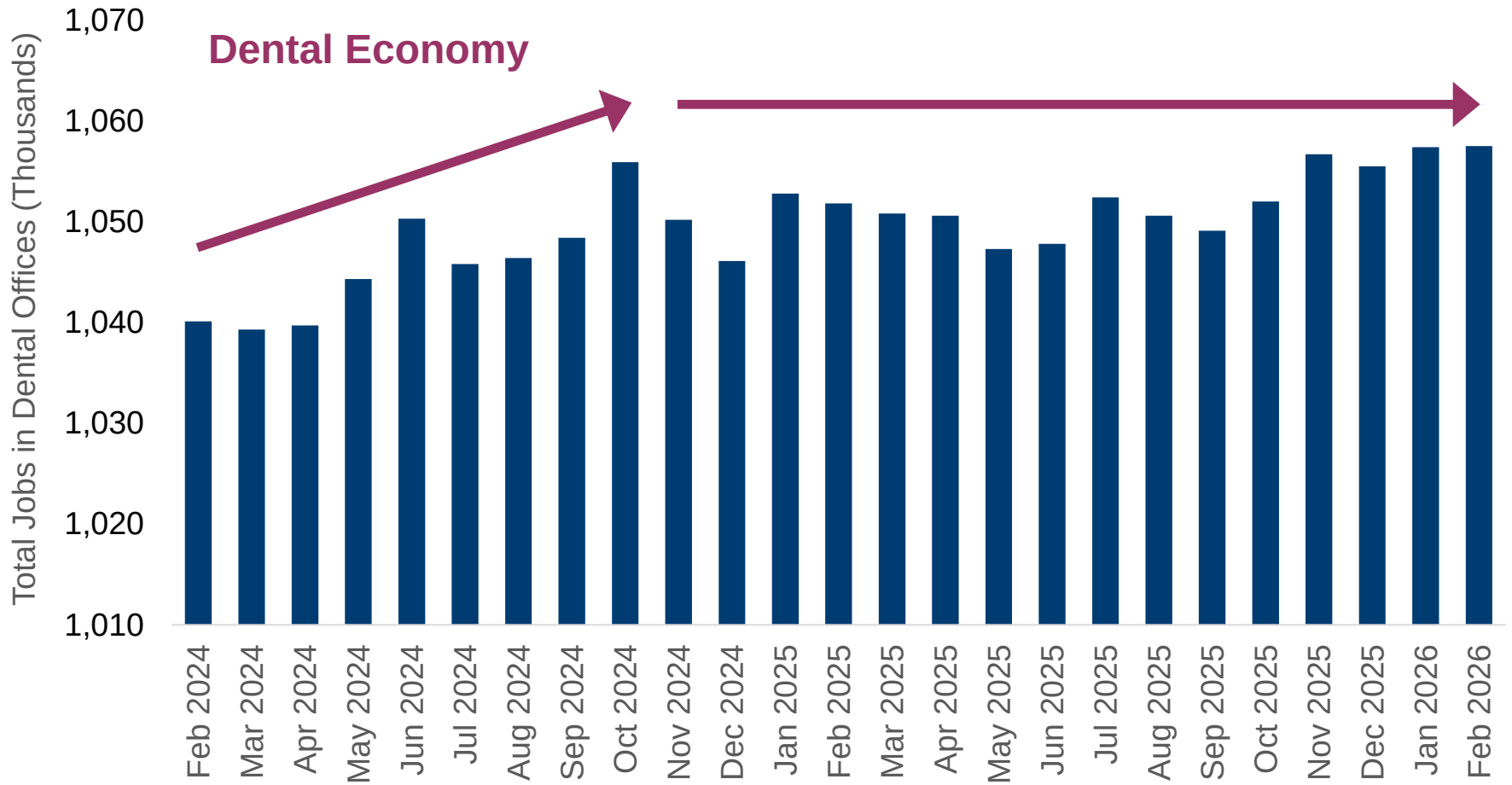
Dental Sector Employment Flat



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

- Up less than 0.1% from month prior
- Up 0.5% over 12 months

Source: U.S. Bureau of Labor Statistics

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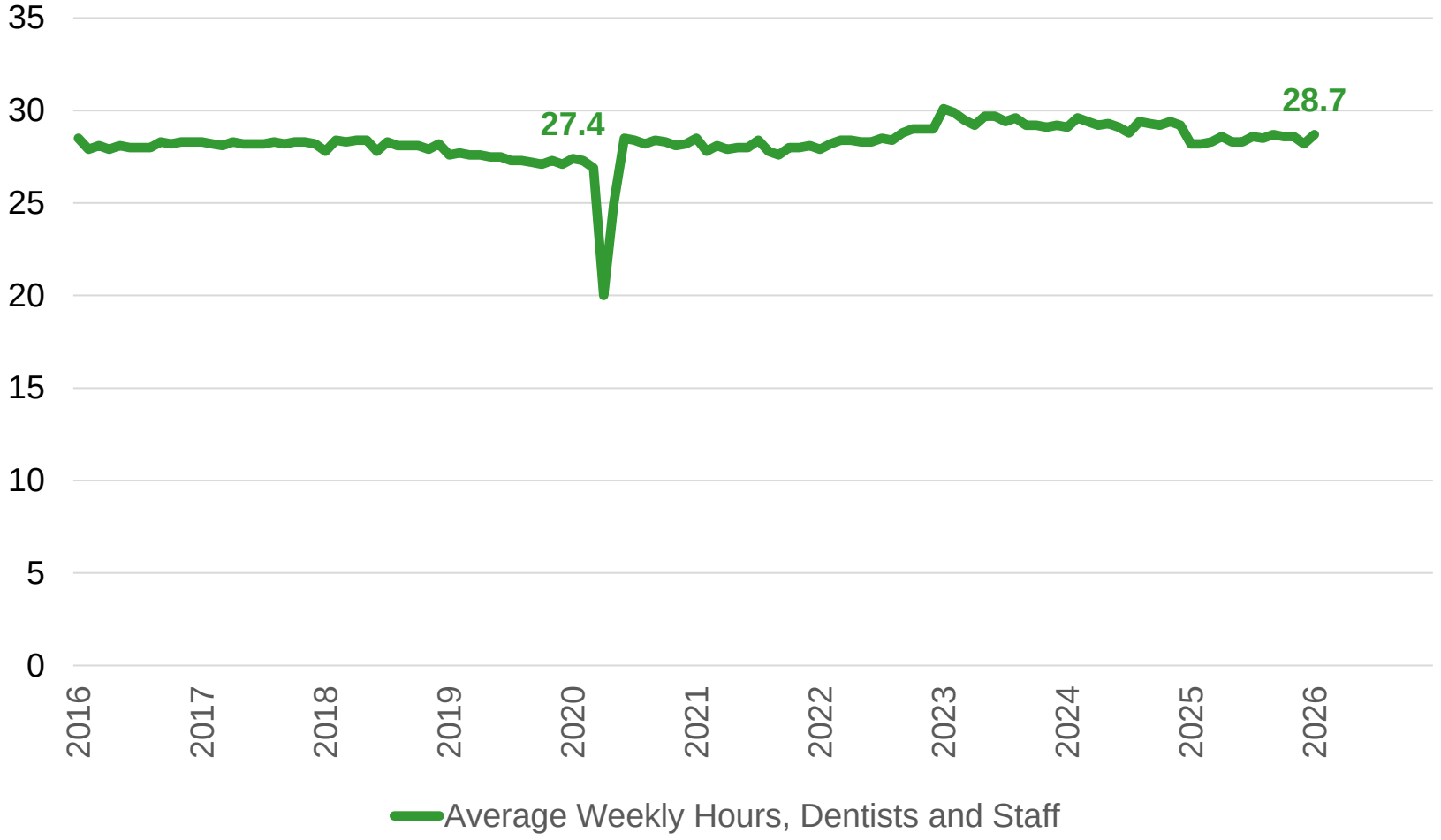
More Hours Worked in Dental Sector



There is a slight upward trend from a year ago in hours worked. Specifically, in January 2026, average hours worked per week among dentists and their staff were:

- Up 0.5 hour from one month prior
- Up 0.5 hour in 2026
- Up 0.5 hour from 12 months prior

Source: U.S. Bureau of Labor Statistics

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A Closer Look Into Staffing Challenges

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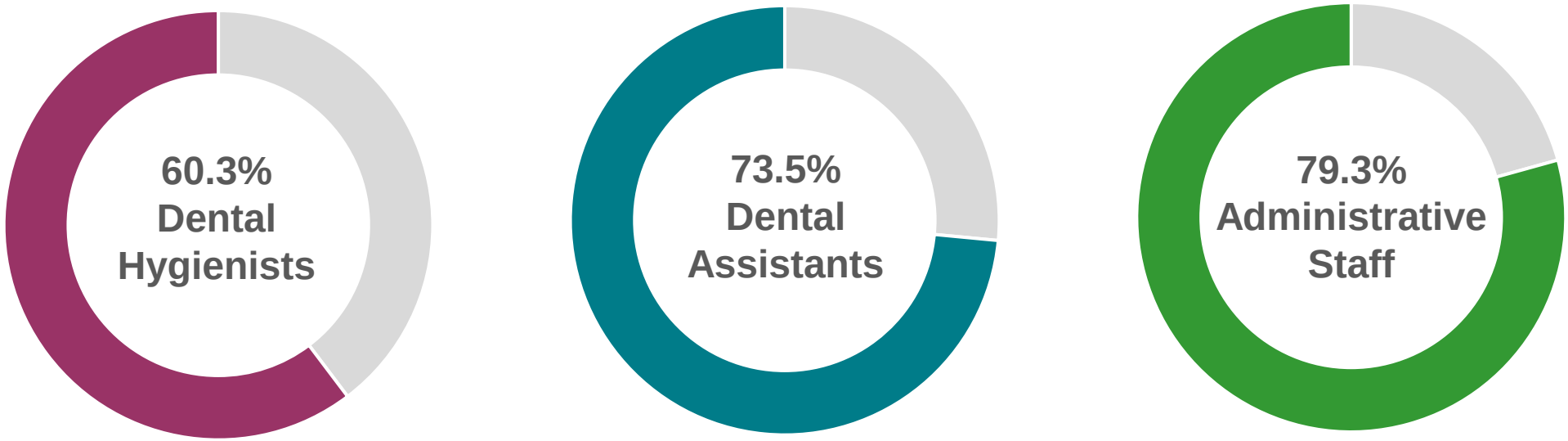
Around 3 out of 5 Dentists Have Enough Hygienists

Does your practice currently have an adequate number of non-dentist staff in each of the following categories? (Percentage saying "Yes.")



Dentists are more likely to report not having enough dental hygienists compared to other staff positions, though a lack of adequacy is reported by at least 1 in 4 dentists for each of these positions.

Source: ADA Health Policy Institute

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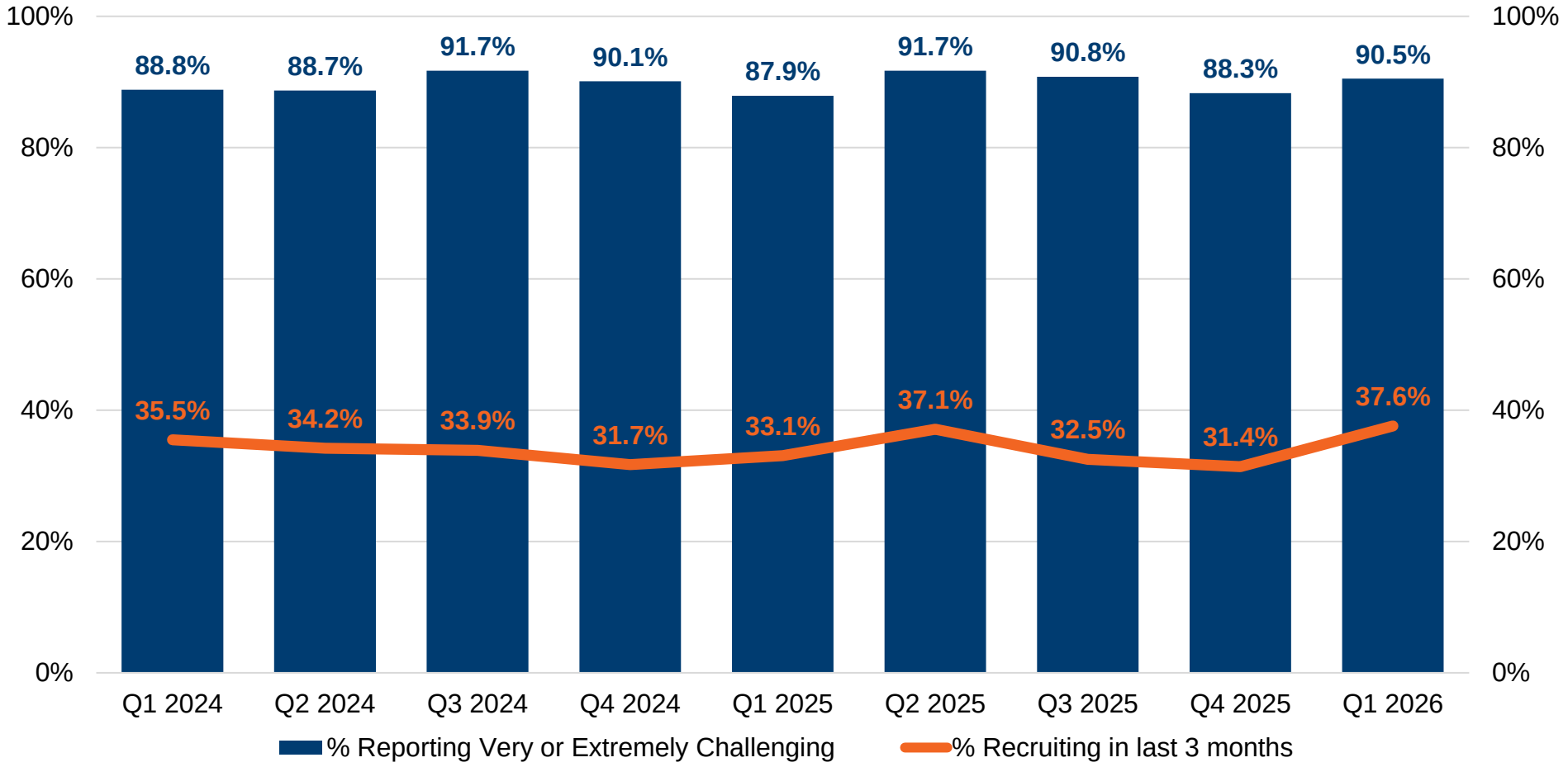
Dental Hygienists the Hardest to Recruit



Nearly 2 in 5 dentists were recruiting dental hygienists in the last three months. 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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Challenges in Recruiting Dental Hygienists

In Q1 2026, 37.6% of dentists reported having recruited a dental hygienist in the past three months. Among those dentists, over 90% said recruiting was either "very" or "extremely challenging."

What specifically has been challenging about recruiting dental hygienists?

TOP FIVE REASONS

1. Not enough applicants, hygienist shortage (66.5%)
2. Demand for high wages, benefits (36.8%)
3. Applicants do not want to work advertised hours (7.9%)
4. Applicants not qualified or of poor quality (5.9%)
5. Mismatch between wages vs. insurance reimbursement (5.9%)

Source: ADA Health Policy Institute

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Challenges in Recruiting Dental Hygienists

WHAT DENTISTS ARE SAYING…

"Very few unemployed dental hygienists in this area. No new graduates."

“Not a single application in 9 months.”

“3 months of sponsored advertising… and one tattoo artist applied.”

“The hygienists that temp have no interest in working full time.”

“There are none, and all my colleagues also have ads out for hygienists.”

“There are not enough and the wages they are asking for are over reimbursement rates.”

Source: ADA Health Policy Institute

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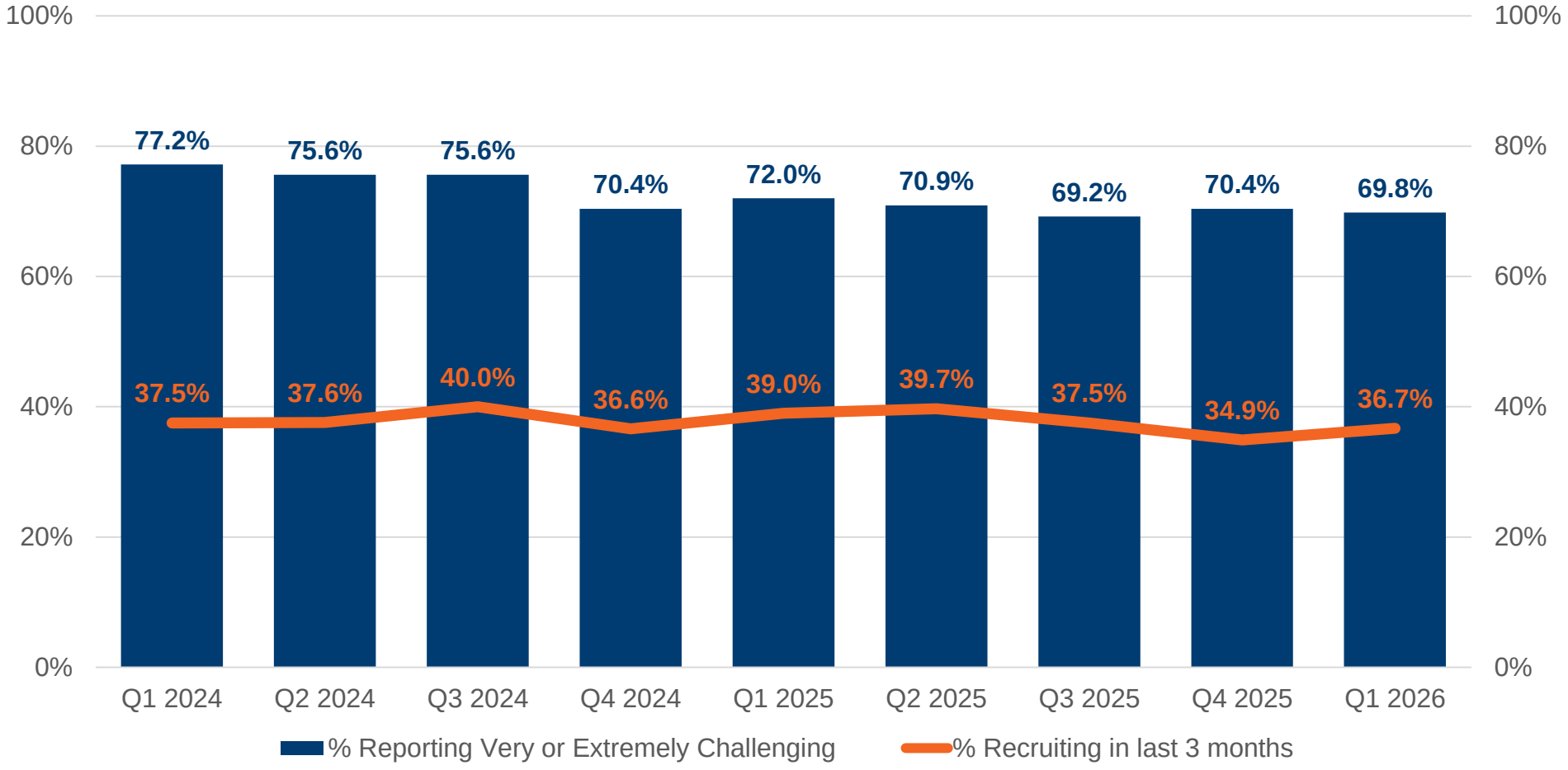
Dental Assistants Slightly Less Difficult to Recruit



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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Challenges in Recruiting Dental Assistants

In Q1 2026, 36.7% of dentists reported having recruited a dental assistant in the past three months. Among those dentists, about 70% said recruiting was either "very" or "extremely challenging."

What specifically has been challenging about recruiting dental assistants?

TOP FIVE REASONS

1. Not enough applicants, assistant shortage (57.5%)
2. Applicants not qualified or of poor quality (40.9%)
3. Demand for high wages and benefits (17.1%)
4. Applicants do not show up to interviews (5.0%)
5. Location of practice makes recruitment challenging (2.8%)

Source: ADA Health Policy Institute

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Challenges in Recruiting Dental Assistants

WHAT DENTISTS ARE SAYING…

"Although there are now responses for these positions, the asking salaries for the position are now far too expensive for practices engaged in treating patients in government programs and/or PPOs. Those payers have not increased reimbursement in over 20 years but these asking salaries have now almost tripled."

"Heavy recruiting, and I cannot compete against the DSO EFDA… because of all the benefits they pay them."

"We now have to use a recruiter and pay 17% of first year's wage. This drives up everyone's cost. They are just stealing assistants from other practices."

"Nobody with experience applies. The candidate pool is large but VERY shallow."

"Often applicants apply and don't respond to phone calls or don't keep scheduled phone calls or interviews."

Source: ADA Health Policy Institute

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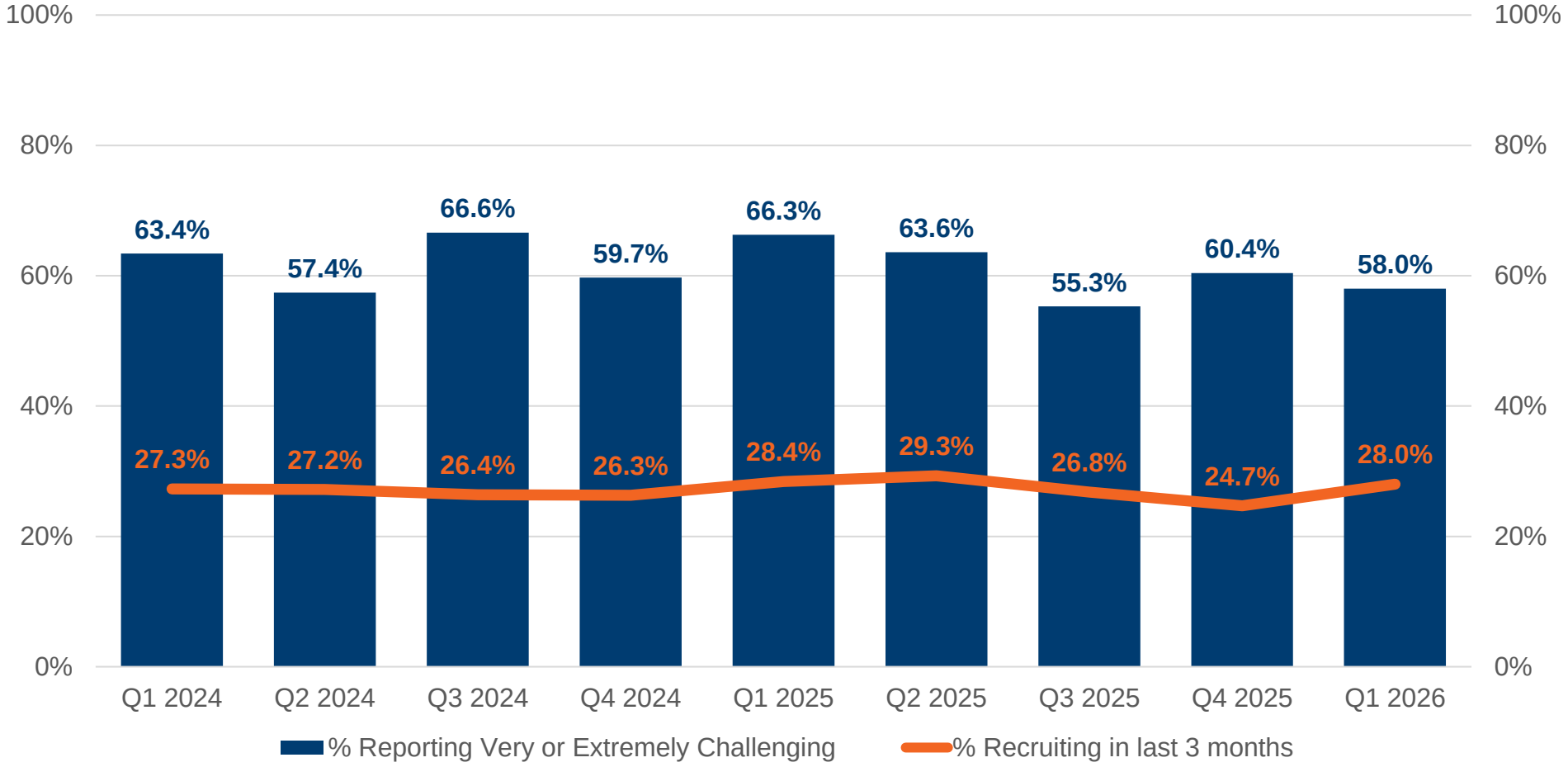
Demand for Admin Staff Lower, Still Difficult to Recruit



Compared to dental hygienists and dental assistants, demand for administrative staff is lower, as is the perceived difficulty in recruiting them. Still, more than half of dentists who have tried agree that recruiting administrative staff is “very” or “extremely challenging.”

Source: ADA Health Policy Institute

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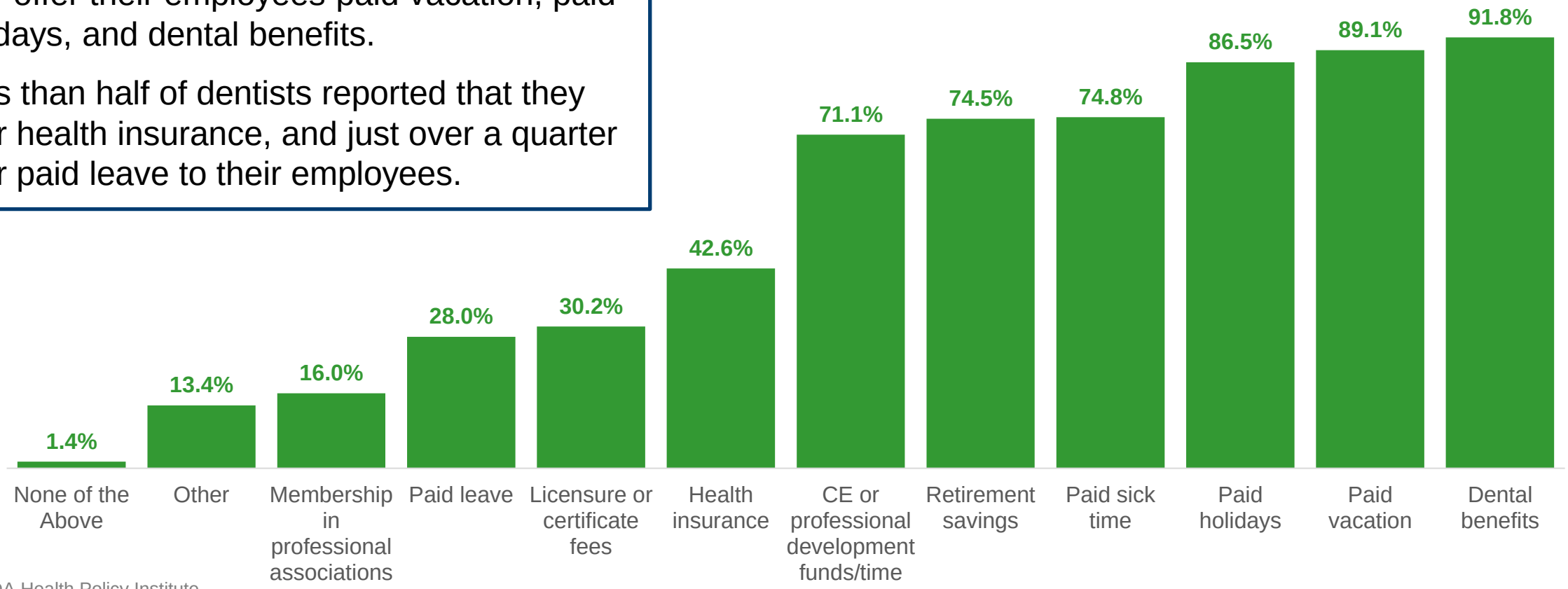
Dental, Vacation and Holidays: Most Offered Benefits

At least eight out of ten dentists reported that they offer their employees paid vacation, paid holidays, and dental benefits.

Less than half of dentists reported that they offer health insurance, and just over a quarter offer paid leave to their employees.



Source: ADA Health Policy Institute

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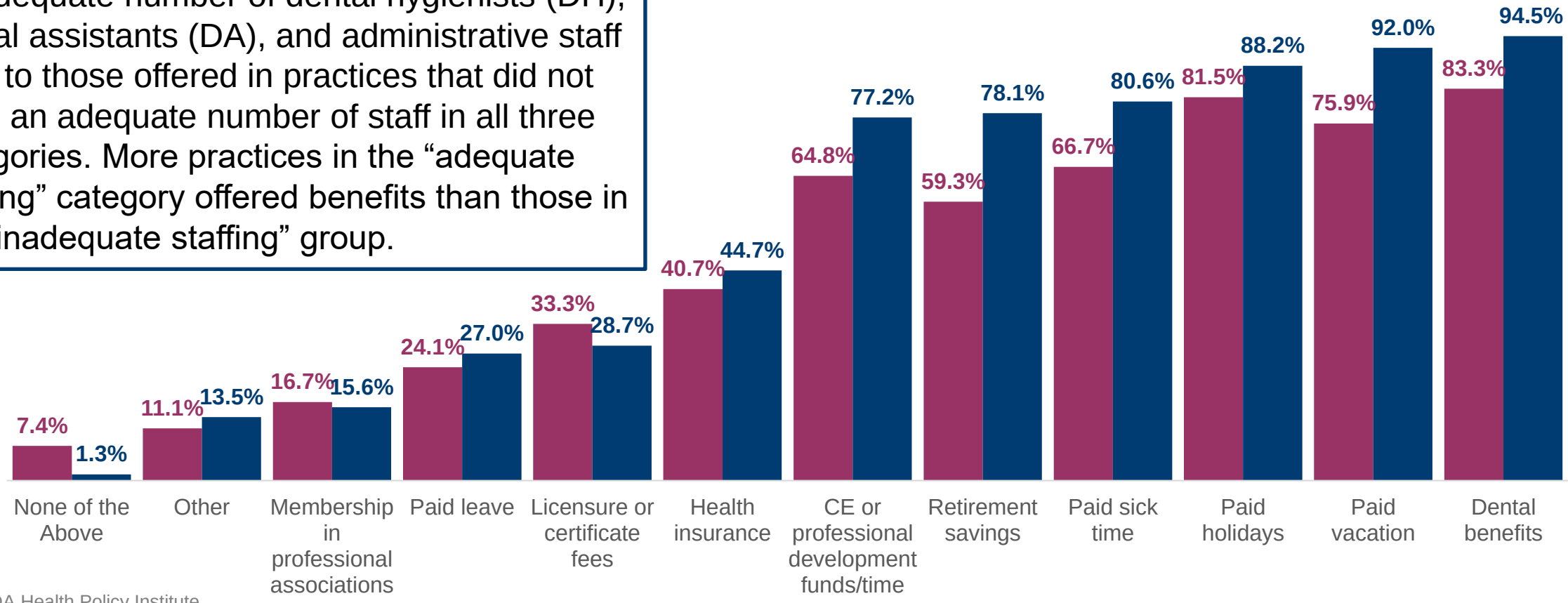
Benefits Offered vs. Adequacy of Number of Staff

We compared benefits offered in practices with an adequate number of dental hygienists (DH), dental assistants (DA), and administrative staff (AS) to those offered in practices that did not have an adequate number of staff in all three categories. More practices in the “adequate staffing” category offered benefits than those in the “inadequate staffing” group.



Source: ADA Health Policy Institute

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Key Takeaways for Q1 2026

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Key Takeaways

Dentists' economic confidence is holding steady. In Q1 2026, dentists' confidence in their own practice and the dental sector is up ever so slightly compared to Q4 2025. But looking at the past year, it is flat. Reasons dentists felt confident about the dental sector included a stable demand for dentistry, practice busyness, and the overall economic resilience of the dental sector. For dentists that were skeptical about the dental sector, the most common reasons were insurance pressures such as low reimbursement rates, inflation and rising practice costs, and the overall U.S. economic downturn.

Consumer dental spending is growing modestly while dentist busyness is stable. Consumer spending on dental care is up 4% over the last 12 months (and 24% over 10 years) but is still behind health spending. The modest growth in dental spending is easily absorbed within dental practices. In Q1 2026, around one-third of dentists reported that they are not busy enough, up from one-quarter of dentists in Q1 2024. Appointment wait times for new patients have gone down by approximately two days since Q1 2024.

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Key Takeaways

Prices for dental equipment and supplies are rising while reimbursement rates are not. After adjusting for inflation, prices for common practice expenses are rising much faster than reimbursement rates. The “fiscal squeeze” on dental practices continues.

Total employment in the dental sector is flat. The number of jobs in the dental sector has grown less than 1% over the last twelve months.

Recruitment challenges persist: 2 out of 5 dentists report they do not have enough dental hygienists compared to one-quarter not having enough dental assistants and one-fifth not having enough administrative staff. At least four out of five dentists who have recruited hygienists consistently report that it is “very” or “extremely challenging” to do so, citing issues such as limited pool of applicants or unqualified applicants, high demand for wages and benefits, and applicants preferring temporary employment.

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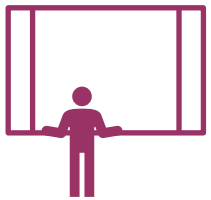
Big Picture



The data from Q1 2026 show a continuation of several trends seen throughout 2025: stable economic confidence among dentists, decreasing shares of dentists feeling overworked, modest growth in dental spending, and a continued "fiscal squeeze" stemming from equipment and supply prices, as well as wages, rising faster than reimbursement rates.

Our deep dive into staffing issues reveals continued recruitment challenges. One-third of dentists consistently say they are trying to recruit dental hygienists and of that one-third, filling vacant positions is very challenging. Ultimately, some dentists struggle to find any applicants at all while others cannot find qualified applicants willing to work the advertised hours and for the advertised wages and benefits. The ongoing “fiscal squeeze” is likely contributing challenges offering competitive salaries and benefits for qualified applicants. In fact, the latest data show average hourly wages for dental office staff in the U.S. are unchanged over the past 12 months, once inflation is accounted for. Recruitment challenges, thus, are likely to persist.

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Thank you!

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marko-vujicic

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Data Sources and Methods

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Data Sources and Methods

Dentists' Economic Confidence

- **Slides 5 to 9**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q1 2026. Unpublished data. Based on 796 responses.

  Notes for Slide 5: 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."

  Notes for Slide 6 and 8: 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.

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Data Sources and Methods

Consumer Dental Spending

- **Slide 11**

  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 Mar. 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 Mar. 13, 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.

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Data Sources and Methods

Consumer Dental Spending

- **Slide 12**

  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 Mar. 13, 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 Mar. 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 Mar. 13, 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.

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Data Sources and Methods

Dental Practice Economics

- **Slides 14-15**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q1 2026. Unpublished data. Based on 796 responses.

  Notes for Slide 14: 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 15: 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 16**

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 Mar. 18, 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 Mar. 18, 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 Mar. 18, 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 Mar. 18, 2026.

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.

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Data Sources and Methods

Dental Practice Economics

- **Slide 17**

  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 Mar. 18, 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 Mar. 18, 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 Mar. 18, 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.

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Data Sources and Methods

Dental Practice Economics

- **Slide 18**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q4 2025 and Q1 2026. Unpublished data. Based on 796 responses.

  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?" Data for the graph Dentists' Actions so far in 2026 as of Q1 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 “very likely” or “somewhat likely.”

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Data Sources and Methods

Dental Jobs Market

- **Slide 20**

  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 March 6, 2026.

- **Slide 21**

  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 March 6, 2026.

- **Slide 22**

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

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Data Sources and Methods

Staffing Shortages

- **Slides 24-33**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q1 2026. Unpublished data. Based on 796 responses.

  Notes for Slide 24: Data represent those responding to the question, “Does your practice currently have an adequate number of non-dentist staff in each of the following categories: (1) dental hygienists (2) dental assistants (3) administrative staff?“ Data represent dentists who answered “yes.”

  Notes for Slide 25: 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?”

  Notes for Slide 26: Data represent a summary of open-ended responses to question, “What specifically has been challenging about recruiting dental hygienists?”

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Data Sources and Methods

Staffing Shortages

- **Slides 24-33 (continued)**

  Notes for Slide 27: Data represent a summary of open-ended responses to question, “What specifically has been challenging about recruiting dental hygienists?” as well as select verbatim quotes provided by respondents to illustrate the top reasons.

  Notes for Slide 28: 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?“

  Notes for Slide 29: Data represent a summary of open-ended responses to question, “What specifically has been challenging about recruiting dental assistants?”

  Notes for Slide 30: Data represent a summary of open-ended responses to question, “What specifically has been challenging about recruiting dental assistants?” as well as select verbatim quotes provided by respondents to illustrate the top reasons.

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Data Sources and Methods

Staffing Shortages

- **Slide 24-33 (continued)**

  Notes for Slide 31: 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?"

  Notes for Slide 32-33: Data represent responses to the question, “Which of the following benefits do you offer to your employees?”

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