The State of the U.S. Dental Economy

3rd Quarter 2025 Update

HPI Health Policy Institute

ADA American Dental Association®

Q3 2025 State of the U.S. Dental Economy Report

This quarterly report from the ADA's Health Policy Institute offers an overview of the state of the U.S. dental economy, drawing insights from (1) proprietary data collected from a robust, representative sample of dental practices in the U.S., and (2) the latest economic data related to dentistry from various government sources. This report breaks information into four sections:

Dentists' Economic Confidence: Key indicators of the general sentiment in dental practices, including future spending and investment decisions that drive the direction of the dental economy

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 issue

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Dentists' Economic Confidence

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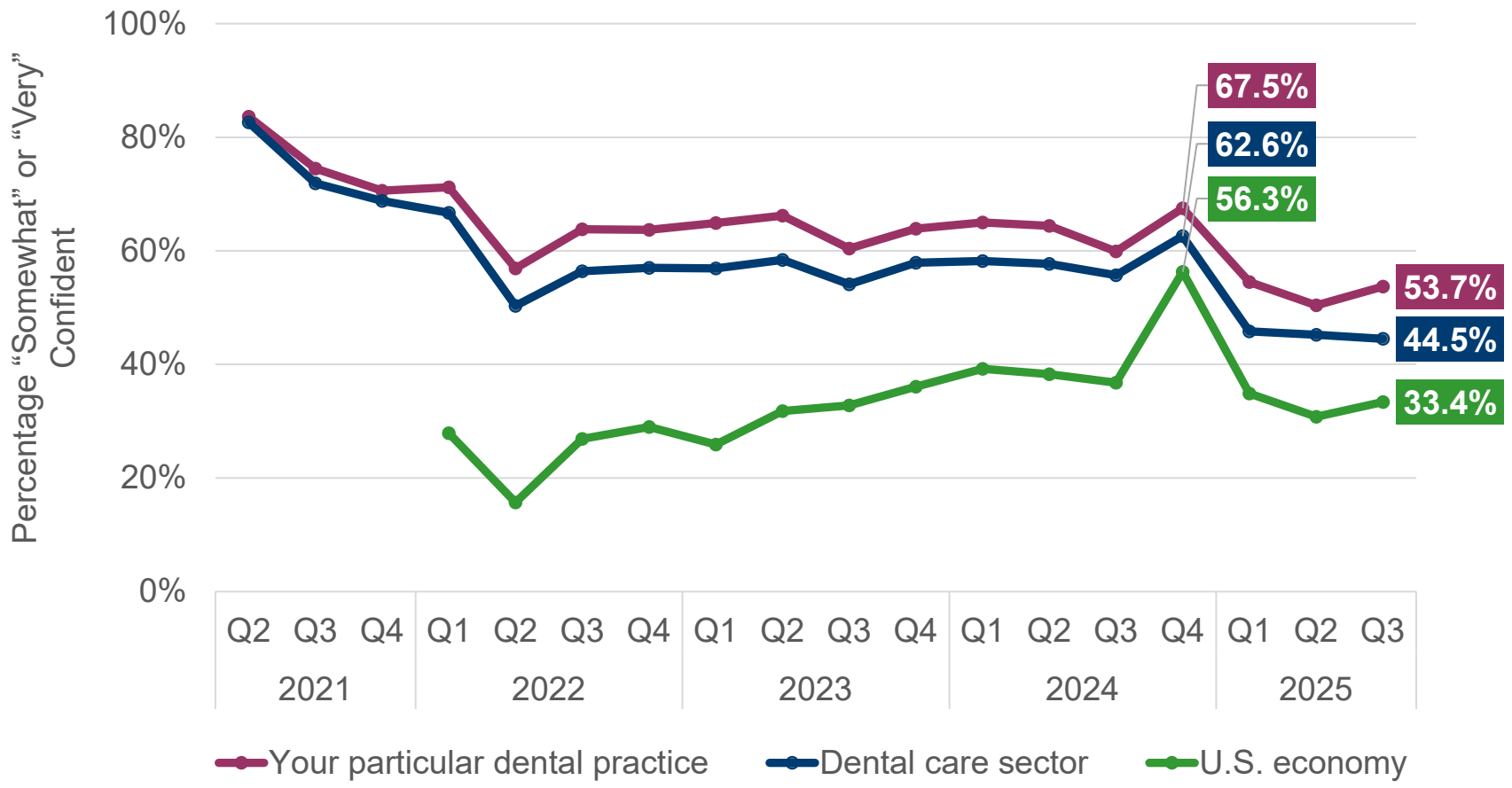
Dentist Economic Confidence Stable



In Q3, dentists' confidence in the **overall economy** went up very slightly.

Dentists' confidence in the **dental care sector** was flat while confidence in **their own practice** went up very slightly.

All measures of economic confidence remain down from the beginning of the year.

Source: ADA Health Policy Institute

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Why Dentists Feel this Way about the **U.S. Economy**

More dentists are skeptical than are confident in the overall U.S. economy.
These are the top reasons for this rating among dentists who are skeptical and those who are confident about the U.S. economy in Q3 2025.

33.4%
Share of Dentists Confident in the U.S. Economy in Q3 2025

TOP FIVE REASONS…

…FOR SKEPTICISM

1. Tariffs concerns
2. Too much uncertainty
3. Domestic social/political unrest
4. Current administration
5. Wars/geopolitical turmoil

…FOR CONFIDENCE

1. Current administration
2. Stable/improving economy
3. Faith in economic resiliency
4. Current trade/tariffs/tax policy
5. No reason/generally optimistic

Source: ADA Health Policy Institute

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

More dentists are skeptical than are confident in the dental care sector. Among those who are skeptical, the main reasons are…

TOP REASONS

1. Low insurance reimbursement
2. State of U.S. economy
3. Inability to pay for dental care
4. Lack of oral health prioritization
5. Policies/legislation

WHAT DENTISTS ARE SAYING…

"Federal cuts to social welfare programs may impact my business as well as increase unemployment. In addition, I am paying more for supplies."

"People are cutting back on discretionary spending, they see dentistry as not important, or other things have greater priority."

"Patients are losing jobs and insurances, costs for basic needs are increasing, and dentistry will not be a priority."

"The cost of running a practice (salaries, rent, supplies, equipment repairs, etc.) has far outpaced reimbursement rates, whether from third party payers or the ability of patients to self-pay."

Source: ADA Health Policy Institute

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

More dentists are skeptical than are confident in the dental care sector. Among those who are confident, the main reasons are…

TOP REASONS

1. Resiliency of dental profession/dental care always needed
2. Steady demand for dental care
3. Optimism about the economy

WHAT DENTISTS ARE SAYING…

"We are very busy, and there are many patients calling to be accepted as new patients."

"Dentistry is essential. Patients might choose less expensive treatment options or choose not to do elective procedures, but patients will always still need care at some level."

"Boomer dentists will be retiring and difficult to replace as new dentists don't have as much interest in owning practices. This should result in practice owners seeing an increase in patients."

"Dentistry is tied to the overall economic performance. The economy is strong and strong enough to weather next 6 months."

Source: ADA Health Policy Institute

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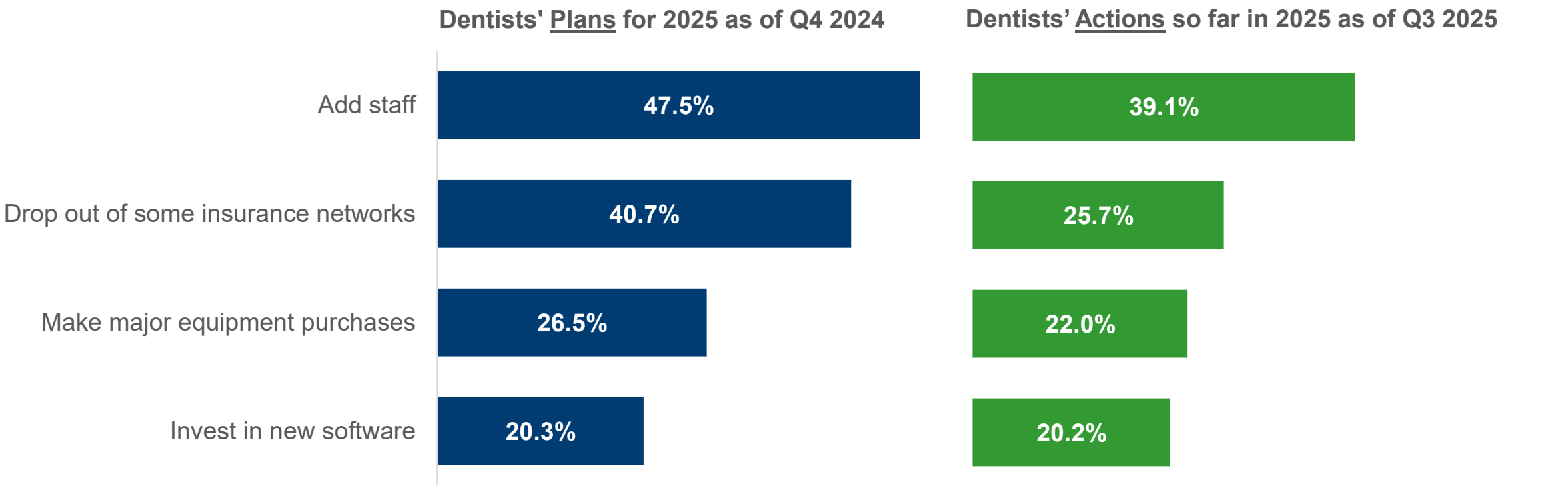
Dentists Sticking with their Plans for 2025



In Q4 2024, dentists were asked about **their plans for 2025**. We asked them in Q3 2025 whether they **had taken action** on any of the items. Dentists are largely following through with their plans, especially when it comes to investing in new software.

Source: ADA Health Policy Institute

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Consumer Dental Spending

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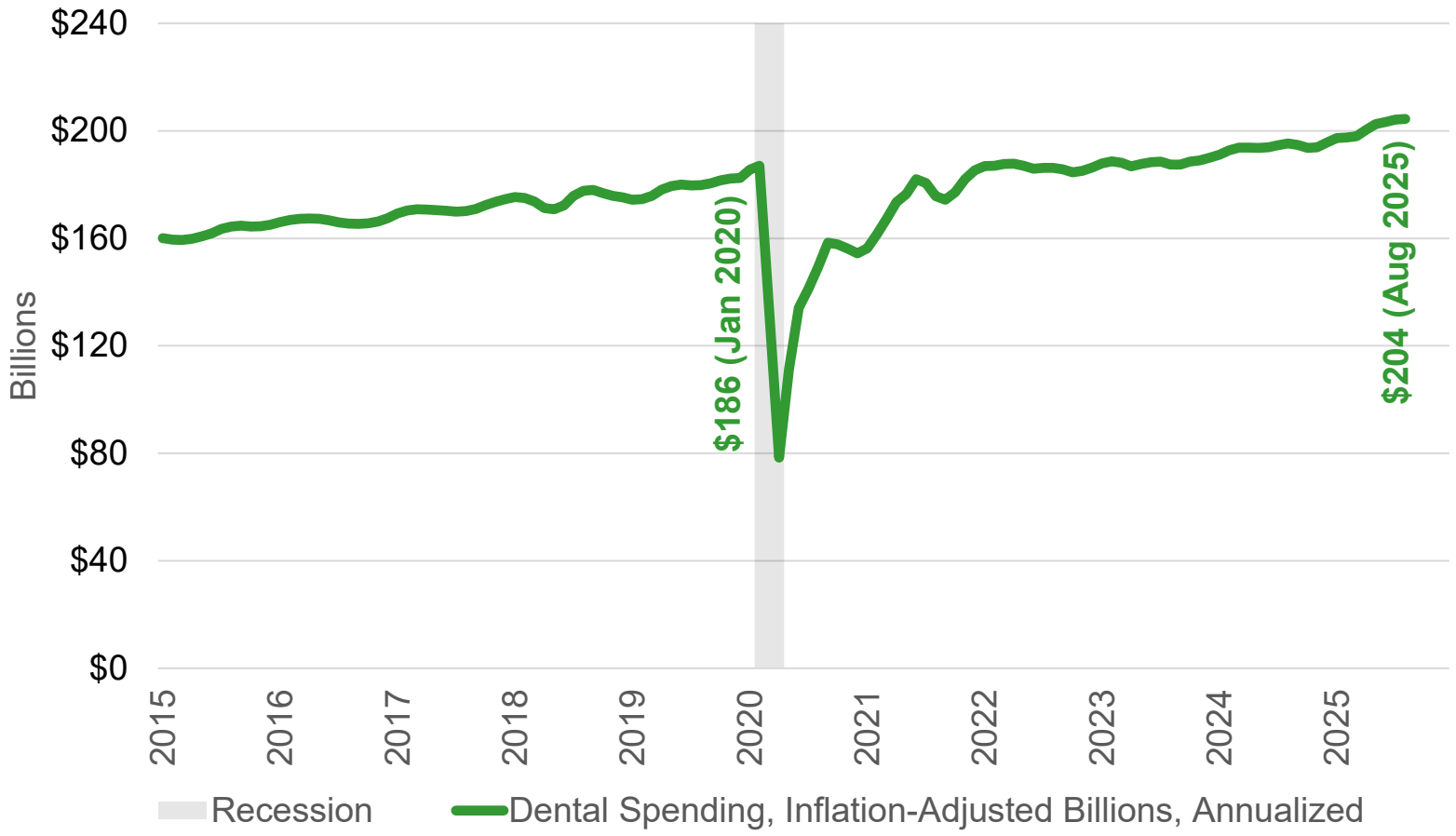
Consumer Dental Spending Up 4% So Far This Year



In August 2025, consumer dental spending was **up**:

- 0.1% from month prior
- 4% so far this year
- 5% from 12 months prior
- 10% from pre-pandemic

Source: Bureau of Economic Analysis. Note: Adjusted for inflation, 2025 dollars.

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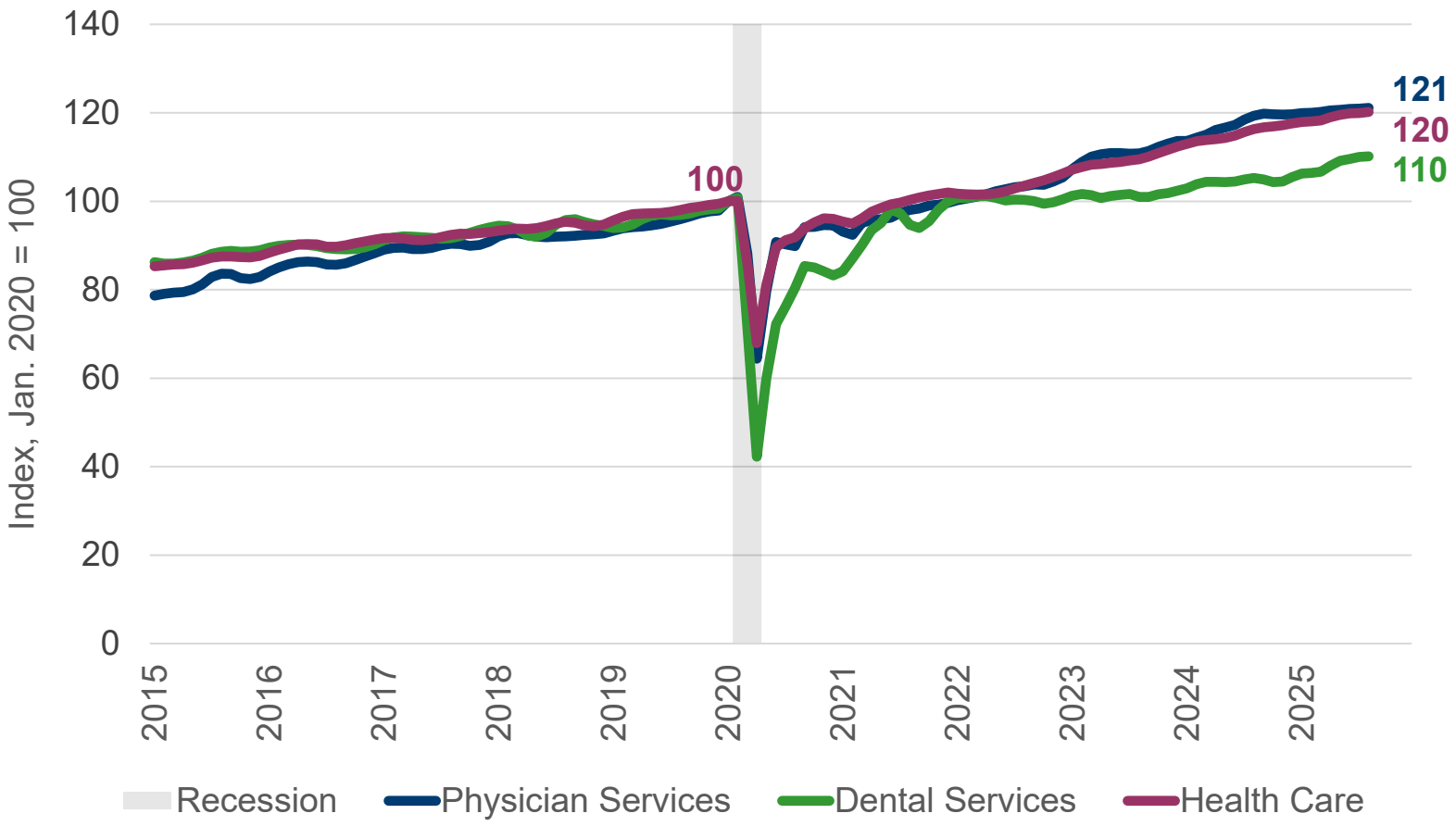
Dental Spending Lags Health Care Spending



Consumer dental spending continues to lag health care spending overall.

Five years post-pandemic, consumer dental spending has grown 10% while overall health care spending has grown 20% and spending on physician services has grown 21%.

Source: Bureau of Economic Analysis. Note: Adjusted for inflation. Growth measured in August 2025 relative to January 2020.

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Dental Practice Economics

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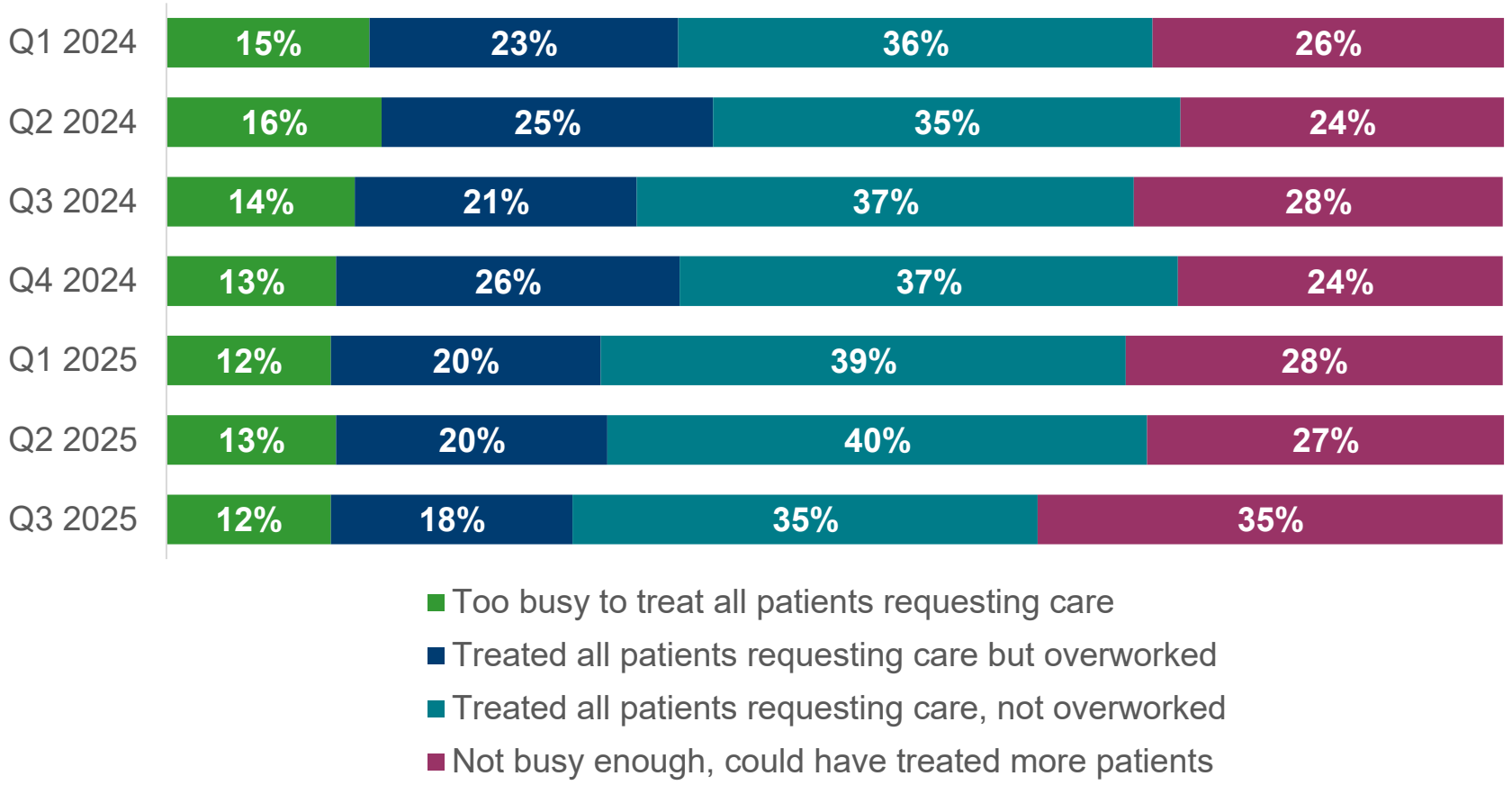
More Dentists Are Not Busy Enough



In Q3 2025, there was a considerable increase in the share of dentists reporting that they are **not busy enough**, rising to more than one-third compared to around one-quarter in Q2 2025 and up from Q3 2024.

Source: ADA Health Policy Institute

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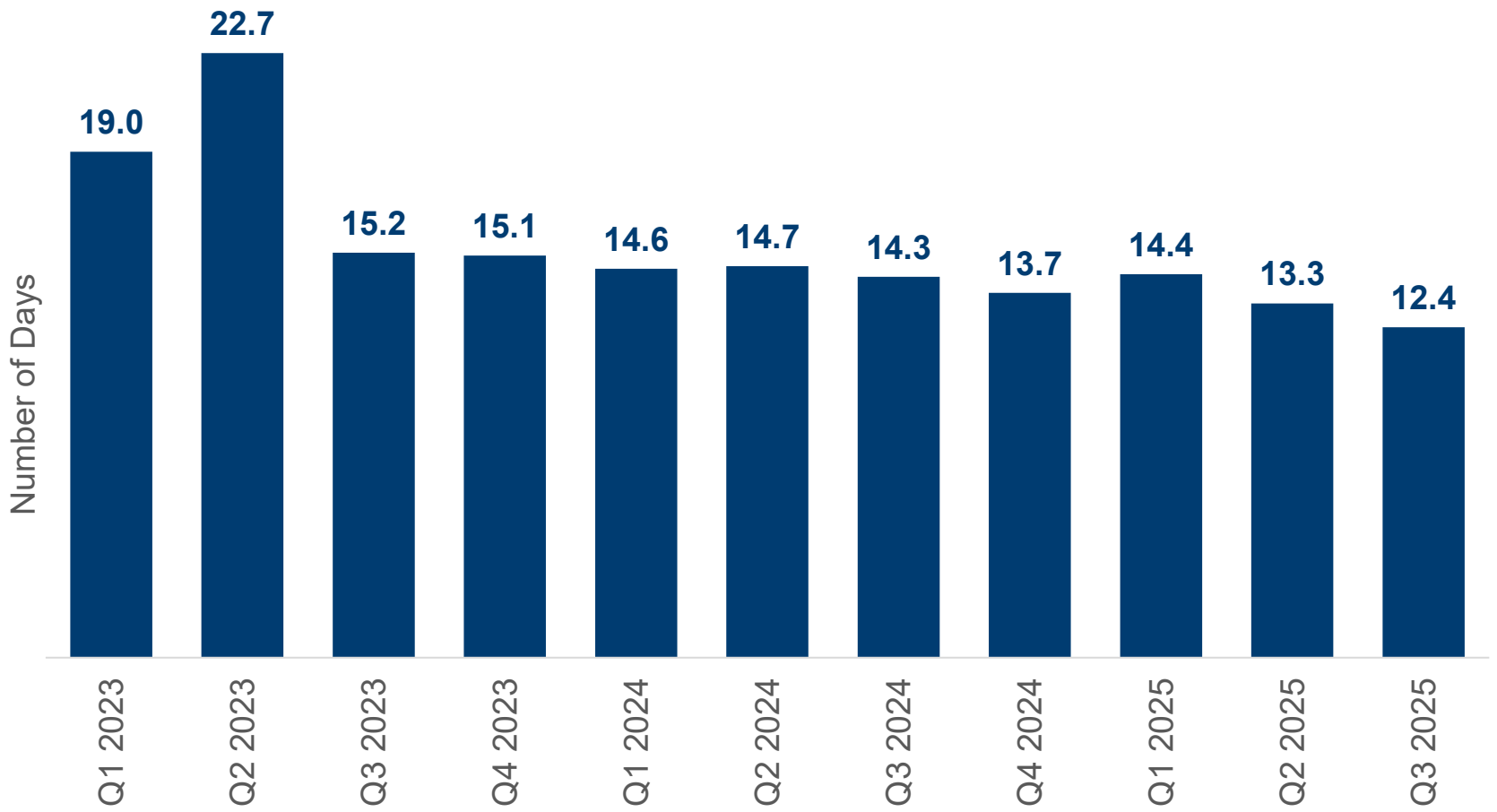
Appointment Wait Times are Down



Source: ADA Health Policy Institute

Appointment wait times for new patients have declined for the second quarter in a row, reaching the lowest point in over three years. On average, it takes just over 12 days for a new patient to receive an appointment.

Shorter appointment wait times correlate with dentists' increasing lack of busyness – demand for appointments may be down.

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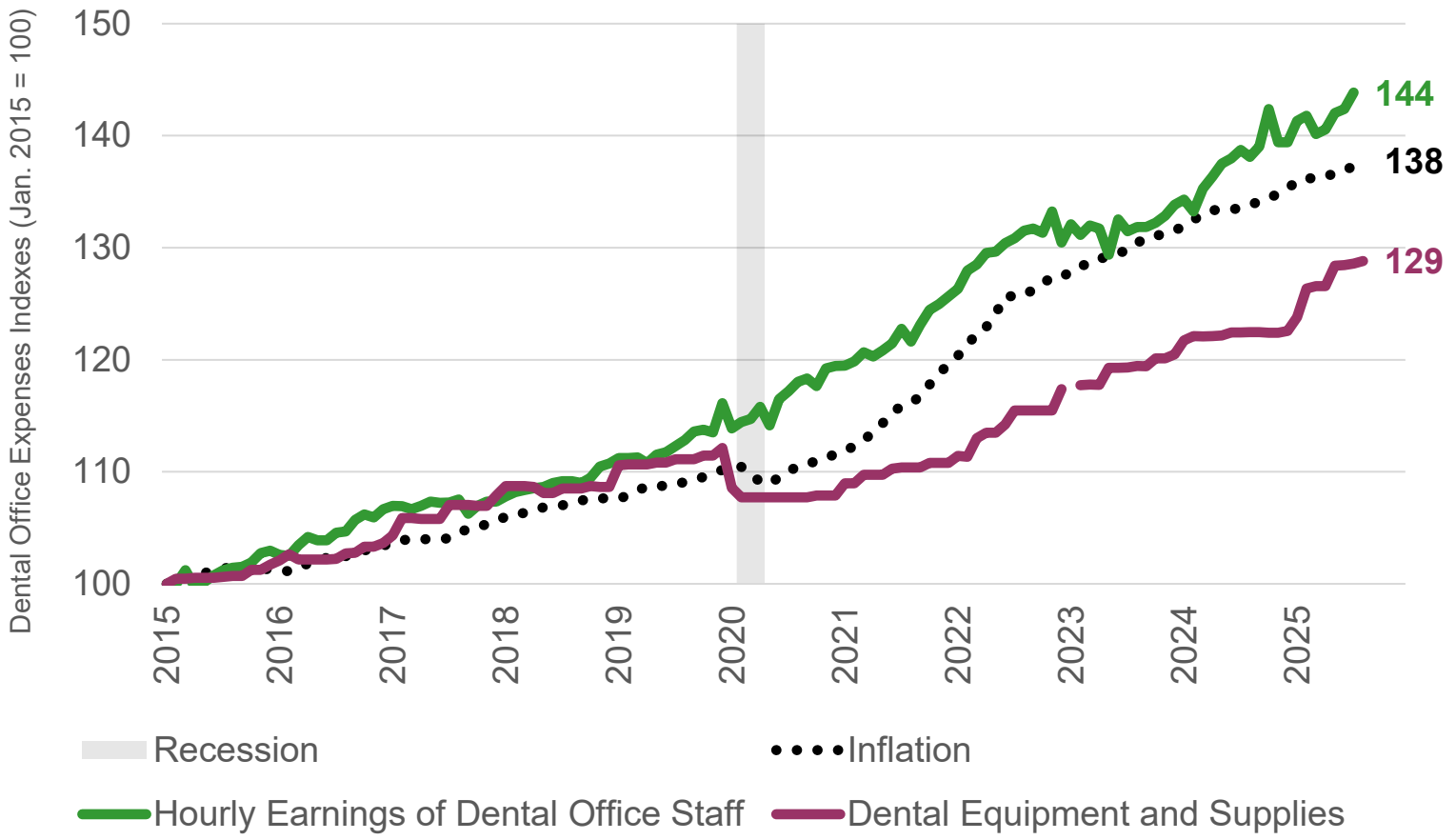
Prices for Equipment and Supplies Increased



In August 2025, prices for dental equipment and supplies continued to increase. Since the beginning of 2025, there has already been a 5% increase.

Hourly earnings for dental office staff have been stable for the past few months. Longer term, however, they have risen slightly faster than overall inflation.

Source: U.S. Bureau of Labor Statistics

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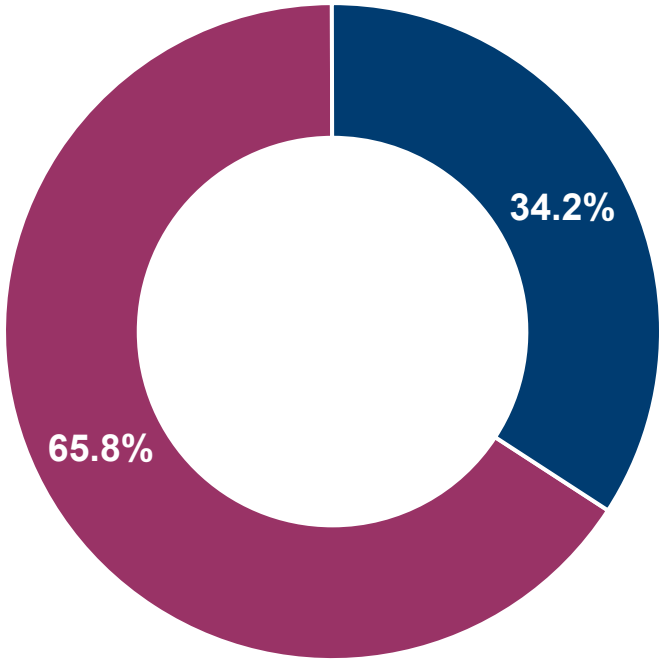
Most Dentists Have Increased Fees This Year

Average Fee Increase 6.7%



Yes, have increased fees No, have not increased fees

Two-thirds of dentists reported that since the beginning of the year, they have **increased their fees**. Among these dentists, the average reported increase across all fees was 6.7%.

Source: ADA Health Policy Institute

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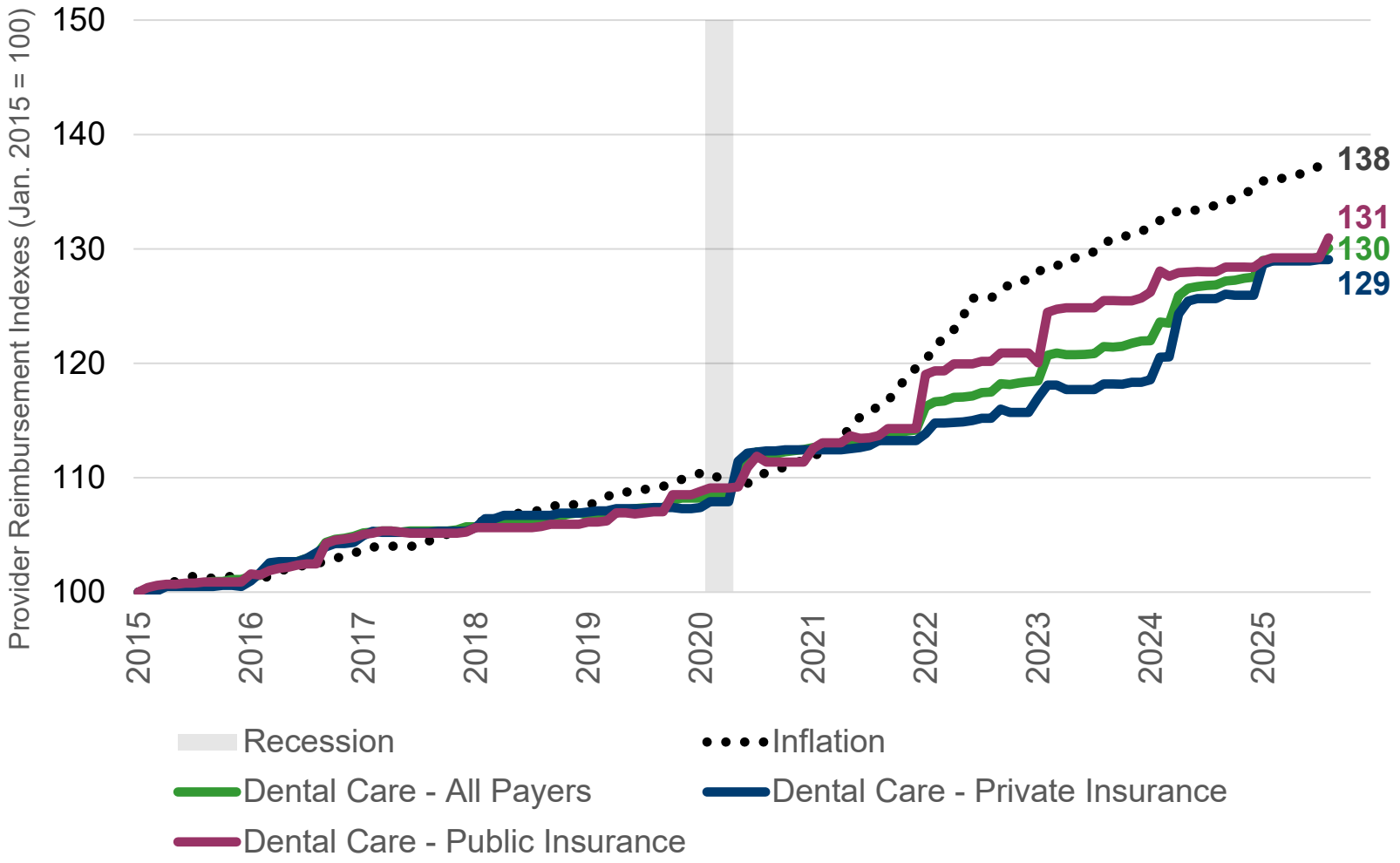
Reimbursement Rates Not Keeping Up with Inflation

In August 2025, 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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Dental Jobs Market

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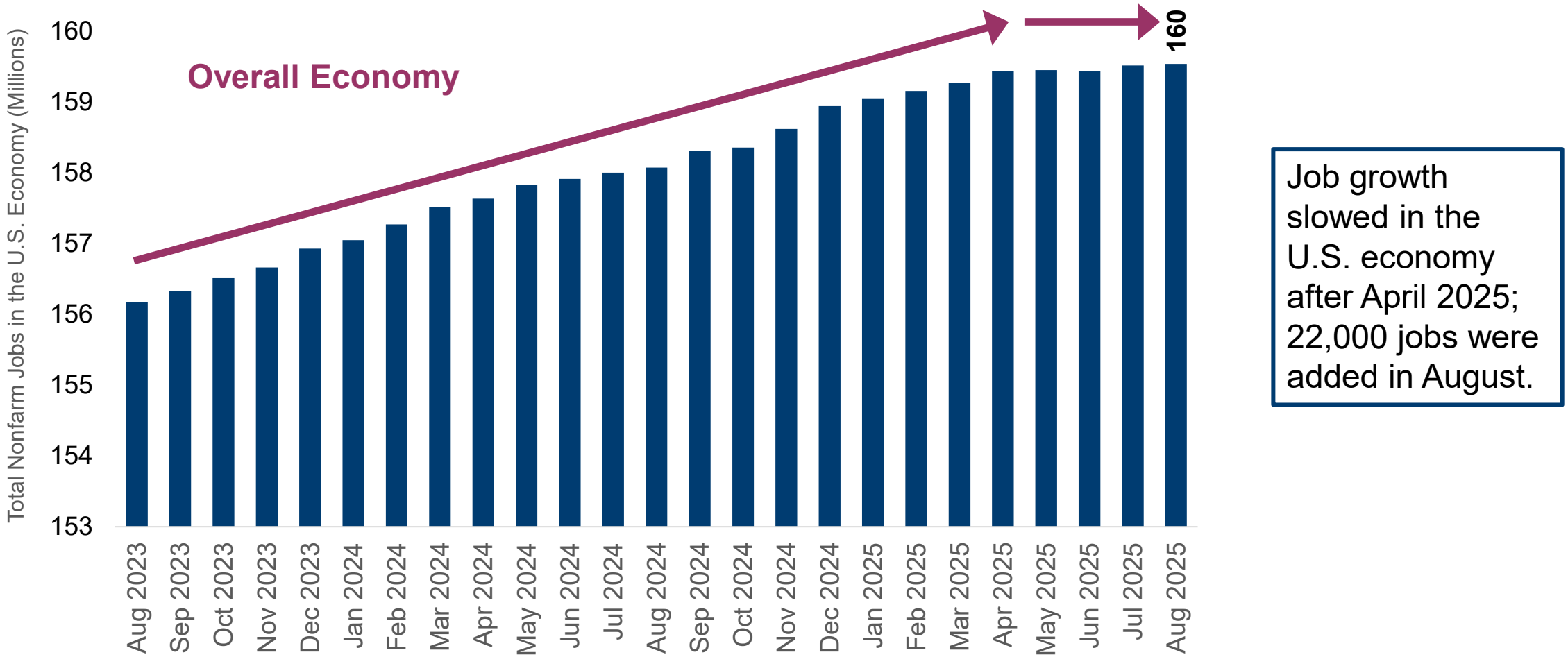
The U.S. Economy Adds Jobs at a Slower Pace



Job growth slowed in the U.S. economy after April 2025; 22,000 jobs were added in August.

Source: U.S. Bureau of Labor Statistics

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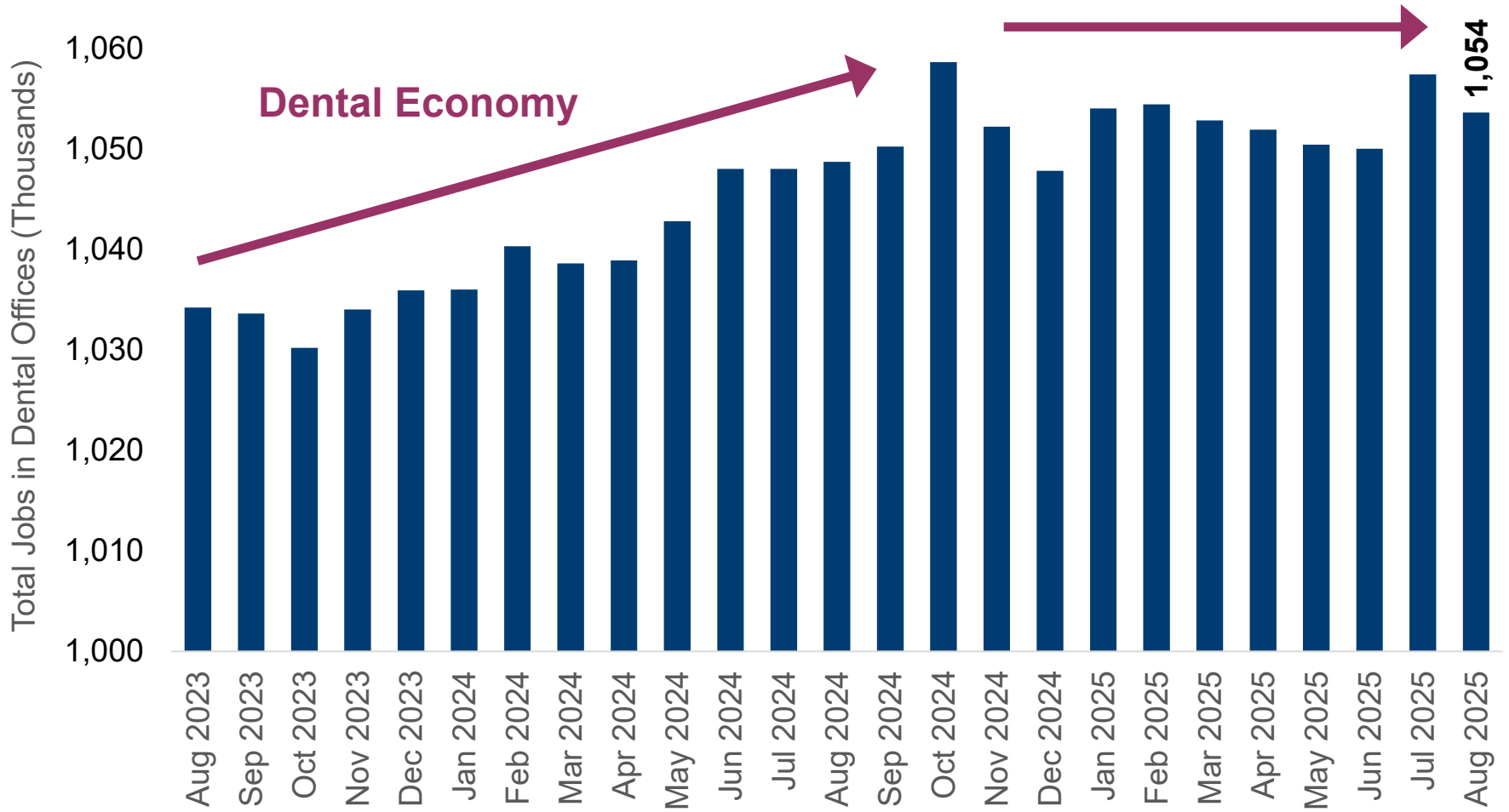
Dental Sector Employment Levels Flat



Like the U.S. economy overall, the dental sector is not seeing much growth in the total number of jobs in recent months. In August 2025, the total number of jobs in dental offices was:

- Down 0.4% from month prior
- Up 0.6% so far this year
- Up 0.5% from 12 months prior

Source: U.S. Bureau of Labor Statistics

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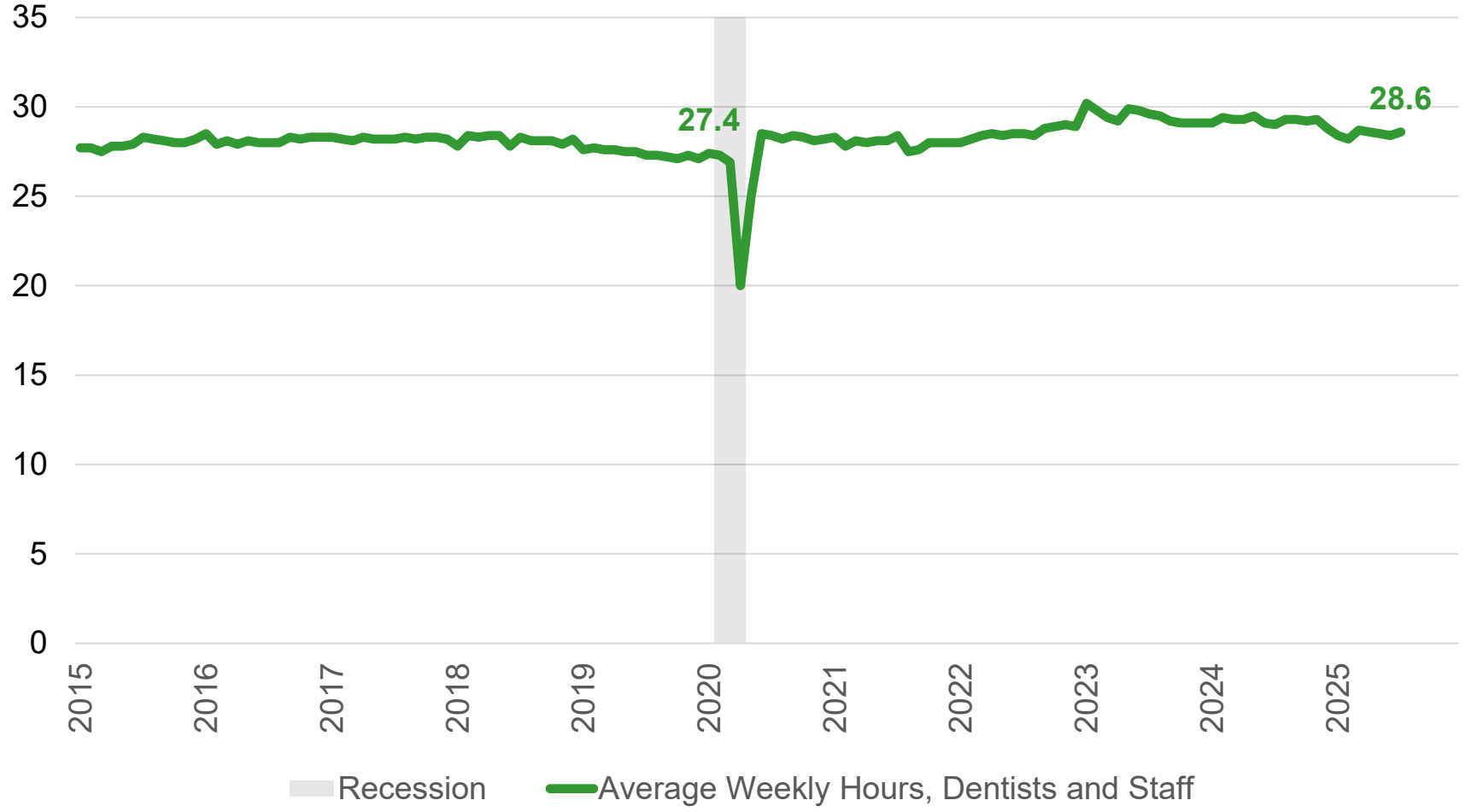
Fewer Hours Worked in Dental Sector



There is a slight downward trend from a year ago in hours worked. Specifically, in July 2025, average hours worked per week among dentists and their staff were:

- Up 0.2 hours from month prior
- Down 0.2 hours so far this year
- Down 0.4 hours from 12 months prior
- Up 1.2 hours from pre-pandemic

Source: U.S. Bureau of Labor Statistics

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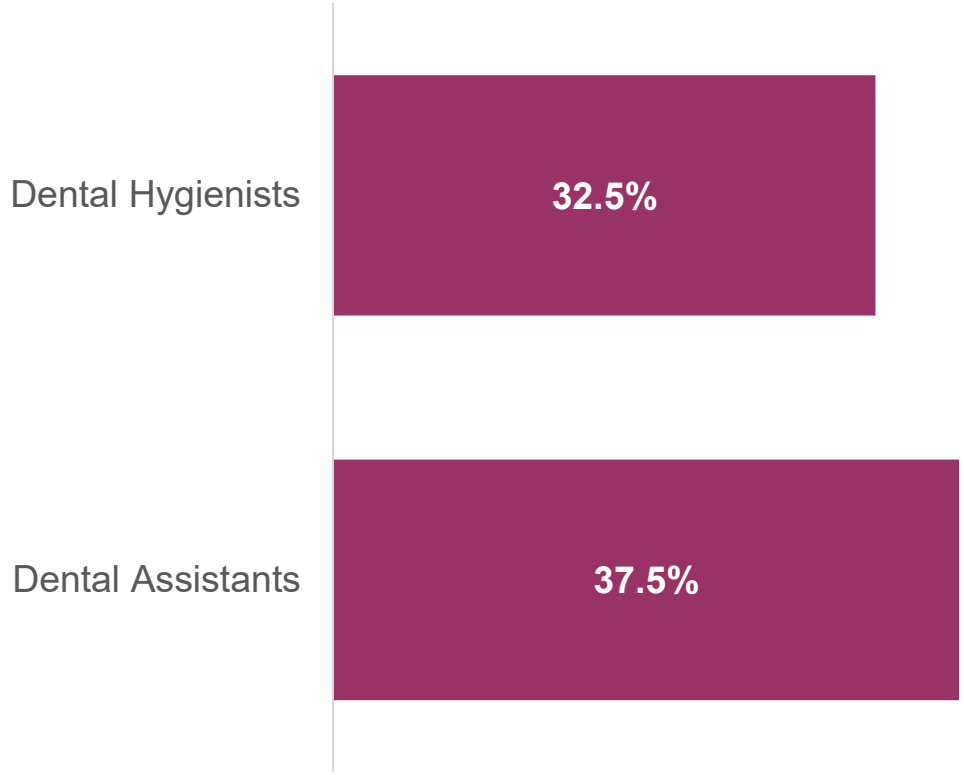
Nearly 1 in 3 Dentists Recruited Hygienists in Q3 2025



Nearly one-third of dentists (32.5%) reported that in the past three months they recruited dental hygienist positions.

A larger share recruited dental assistants, 37.5%.

Source: ADA Health Policy Institute

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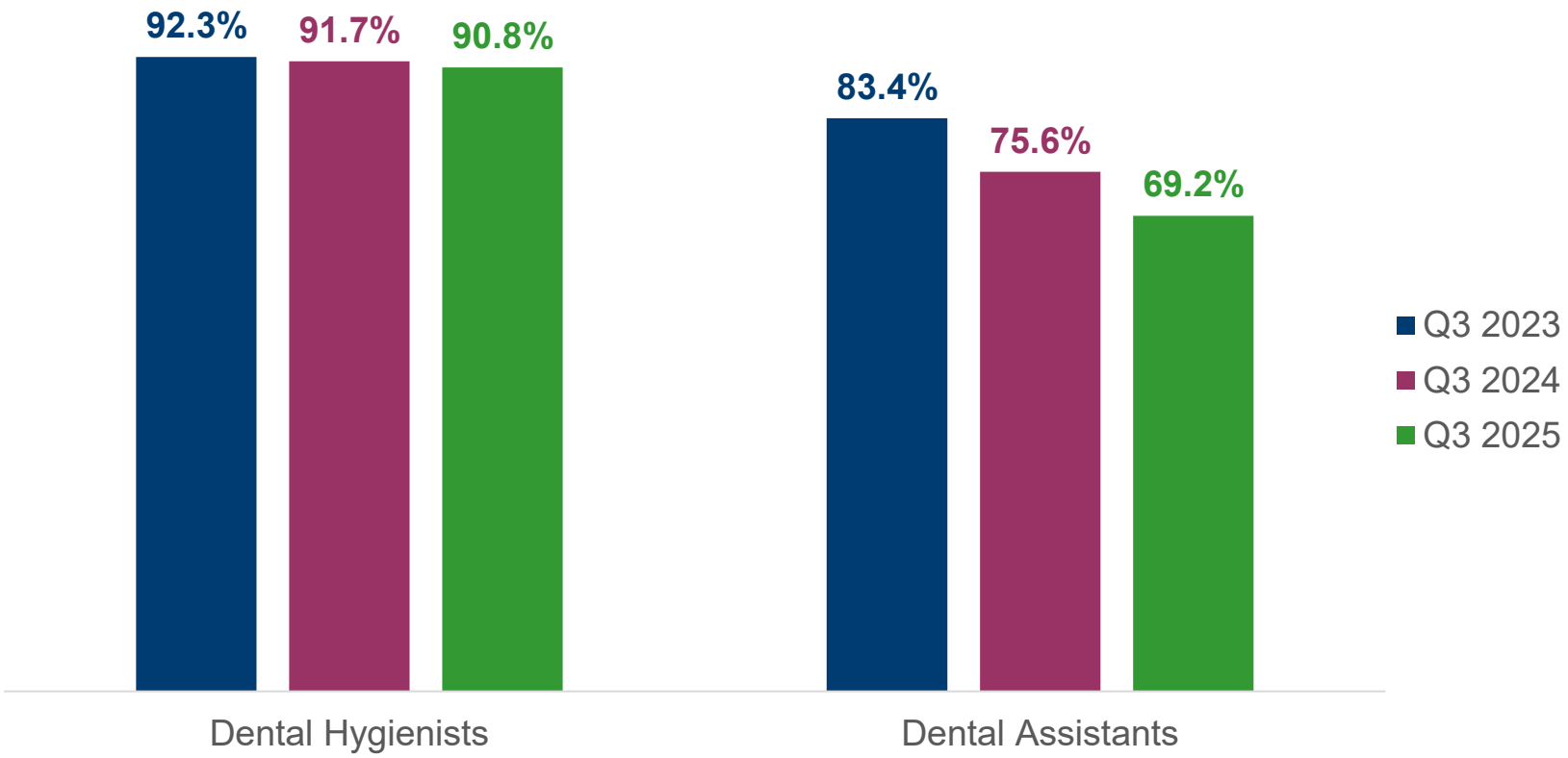
Dental Hygienists Hardest to Recruit



Among the about 1 in 3 dentists who have recently recruited practice staff, the share who rate recruiting dental assistants as "very" or "extremely challenging" has gone down while remaining virtually unchanged for dental hygienists over the past three years.

Dental sector job growth is stagnant, but the need for staff remains high for dentists.

Source: ADA Health Policy Institute

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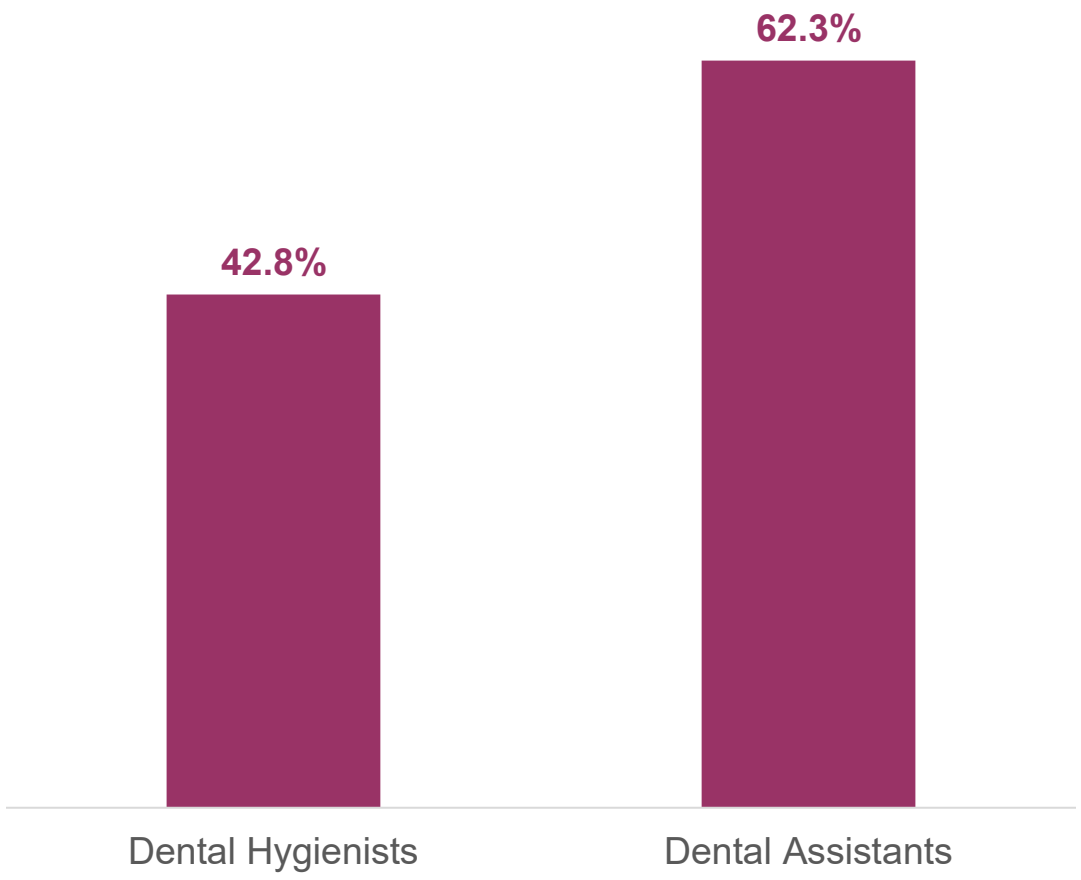
Only a Share of Open Positions Filled in Q3 2025



Perceived difficulty of hiring practice staff is in line with actual hiring results.

Among dentists who were recruiting dental staff in Q3 2025, only two out of five have filled open dental hygienist positions while nearly two-thirds have filled open dental assistant positions.

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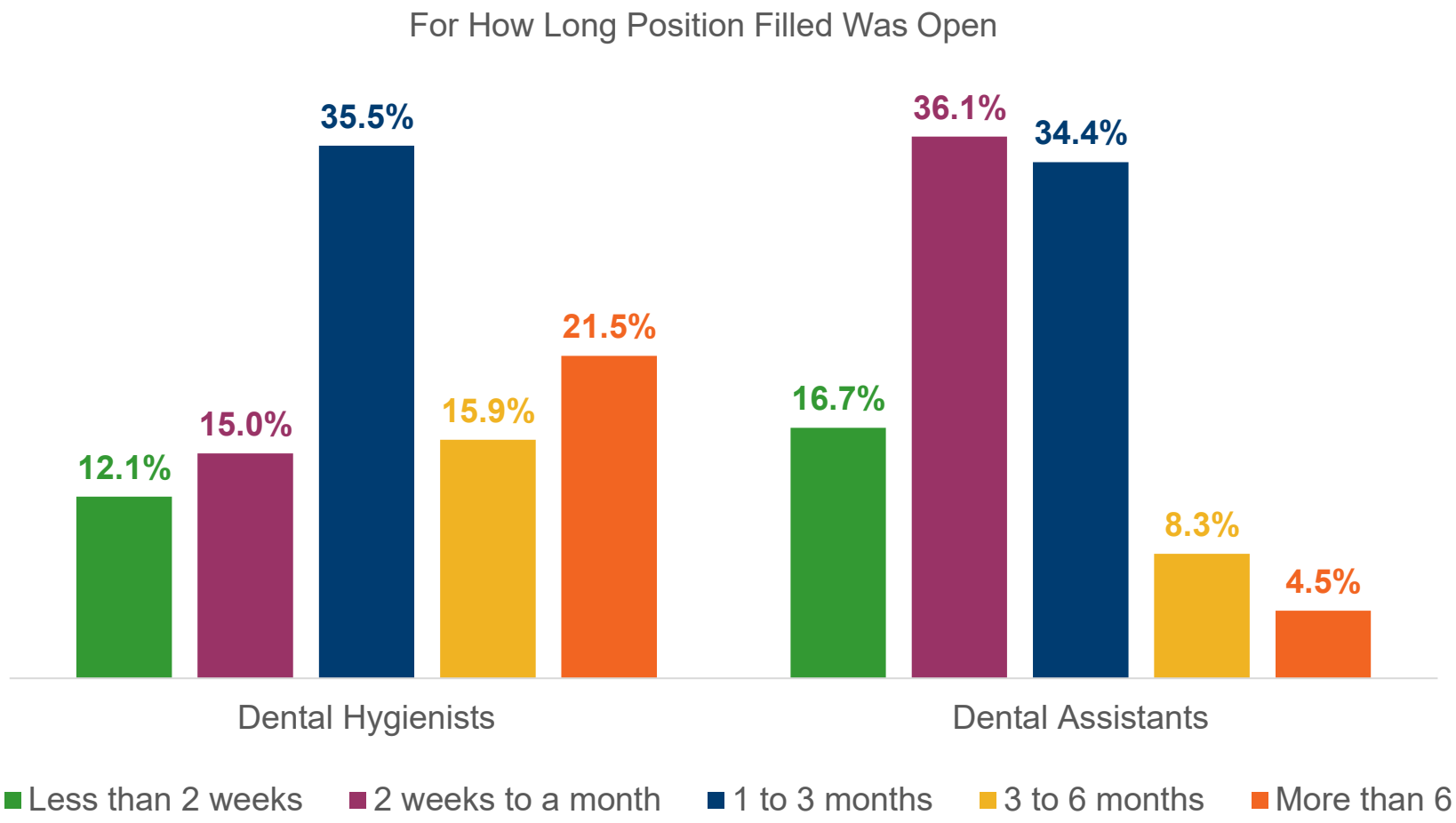
Some Hygienist Positions Unfilled for 6+ Months



Open dental hygienist positions were most commonly filled in 1 to 3 months, but 21.5% of recruiting dentists reported that it took more than 6 months to fill the hygienist position.

For dental assistant positions, most were filled in 3 months or less.

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Key Takeaways for Q3 2025

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Key Takeaways

In Q3 2025, **economic confidence among U.S. dentists was stable**. Two out of five dentists said they are somewhat or very confident in the six-month outlook for the dental care sector. Dentists who are optimistic about the dental sector cite steady patient demand and dental care being essential as reasons for their confidence. Dentists who are skeptical about the future of the dental care sector cite general economic measures, low reimbursement, low patient demand, and patient inability to afford dental care as reasons for their skepticism.

Consumer dental spending is trending up but busyness levels are not. Consumer spending on dental care is up 4% since the beginning of the year (and 10% since the COVID-19 pandemic). The modest growth in spending is easily absorbed within dental practices. Busyness levels are down. More importantly, appointment wait times for new patients are the lowest they have been in over two years.

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Key Takeaways

Dental insurance reimbursement rates are not rising as quickly as prices for equipment, supplies and wages. Dental practices continue to experience a “fiscal squeeze,” which may be further exacerbated by lack of busyness among dentists and stagnant patient volume. Dentists are responding by dropping out of dental insurance networks and increasing fees for uninsured patients.

Job growth in the overall U.S. economy and the dental care sector was flat through Q3 2025. However, **job growth, or lack thereof, is not reflective of dentists’ need for staff**. About 1 in 3 dentists were recruiting during Q3 2025, of which 90% said recruiting dental hygienists was very or extremely challenging – a statistic that has not changed in three years. Among dentists who have recruited hygienists and have filled open positions successfully since the beginning of the year, one-fifth report that the position had been open for more than six months.

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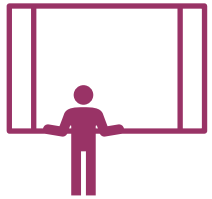
Big Picture

Summing up, the data from Q3 2025 show stagnation in dentists' economic confidence. Dentist perspectives and government data indicate that the "fiscal squeeze" on dental practices continues. More dentists are reporting that they are not busy enough, and two-thirds reported that they have increased their fees since the beginning of the year. Challenges in filling open positions, especially dental hygienists, continue to impact dental practices.



On the consumer side, dental spending continues to increase modestly, but the latest data show this is easily accommodated within the existing capacity in the system. Dentist busyness levels and patient wait times are trending downward, even as spending is rising.

Taken together, the data through Q3 2025 overall suggest the dental economy is in a "holding pattern" with the potential for slight headwinds in the coming months.

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Thank you!

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Data Sources and Methods

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Data Sources and Methods

Dentists' Economic Confidence

- **Slides 4 to 8**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q3 2025. Available at https://www.ada.org/resources/research/health-policy-institute/economic-outlook-and-emerging-issues, accessed October 1, 2025.

  Notes for Slide 4: Data represents 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 5: Data represent a summary of open-ended responses to question, "Please briefly describe the reasons for your skepticism/confidence in the overall U.S. economy."

  Notes for Slides 6-7: Notes: Data represent a summary of open-ended responses to question, "Please briefly describe the reasons for your skepticism/confidence in the dental care sector," as well as select verbatim quotes provided by respondents to illustrate the top reasons.

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Data Sources and Methods

Dentists' Economic Confidence (continued)

Notes for Slide 8: Data for the graph Dentists' Plans for 2025 as of Q4 2024 represent owner dentist responses to the question, "Looking ahead to 2025, how likely are you to do each of the following for your practice?" Data for the graph Dentists' Actions so far in 2025 as of Q3 2025 represent owner dentist responses to the question, "Since the beginning of 2025, have you done any of the following in your practice?

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Data Sources and Methods

Consumer Dental Spending

- **Slide 10**

  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 September 26, 2025.

  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 September 26, 2025.

  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 2025 dollars.

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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, 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 September 26, 2025.

  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 September 26, 2025.

  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 September 26, 2025.

  Notes: These indexes measure the change over time in spending relative to January 2020. An index value of 101 would indicate spending 1% higher than the spending level in January 2020.

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Data Sources and Methods

Dental Practice Economics

- **Slides 13-14**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q3 2025. Available at https://www.ada.org/resources/research/health-policy-institute/economic-outlook-and-emerging-issues, accessed October 1, 2025.

  Notes for Slide 13: 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 14: 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 15**

Sources: U.S. Bureau of Labor Statistics.**(1)** 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 Sep. 11, 2025. **(2)** 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 Sep. 11, 2025. **(3)** Consumer Price Index (CPI-U), All Items, seasonally adjusted. Available at https://www.bls.gov/cpi/data.htm. Accessed Sep. 11, 2025.

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 Sep. 11, 2025.

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 16**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q3 2025. Available at https://www.ada.org/resources/research/health-policy-institute/economic-outlook-and-emerging-issues, accessed October 1, 2025.

  Notes: Data represent responses from owner dentists who responded to the question, “Have you increased your fees this year?” and “If yes, by what percentage have your fees increased on average across all procedures since the beginning of the year?”

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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. PPI Commodity data for Health care services, not seasonally adjusted. Available at https://www.bls.gov/ppi/databases/. Accessed Sep. 11, 2025.

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 Sep. 11, 2025.

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 Sep. 11, 2025.

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 Jobs Market

- **Slide 19**

  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 September 5, 2025.

- **Slide 20**

  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 September 5, 2025.

- **Slide 21**

  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 September 5, 2025.

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Data Sources and Methods

Dental Jobs Market (continued)

- **Slide 22-25**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q3 2025. Available at https://www.ada.org/resources/research/health-policy-institute/economic-outlook-and-emerging-issues, accessed October 1, 2025.

  Notes for Slide 22: Data represent those responding to the question, "Currently, or at any time during the last 3 months, have you recruited any of the following positions?"

  Notes for Slide 23: 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 24: Data represent those who answered the question, “If recruiting dental hygienists or dental assistants, have you filled the position(s)?”

  Notes for Slide 25: Data represent those who answered the question, “For how long was the position(s) open?” Respondents of this question had previously answered "Yes" to the question, “If recruiting dental hygienists or dental assistants, have you filled the position(s)?”

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