The State of the U.S. Dental Economy

3rd Quarter 2026 Update
Plus: Insights on Dental Staff Recruitment

HPI Health Policy Institute
ADA American Dental Association®

Q3 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: Insights on Dental Staff Recruitment

This quarter's report includes additional insights from dentists on the recruitment of dental hygienists and dental assistants to their practices.

Time Spent Recruiting

How long open dental hygienist and dental assistant positions take to be filled, according to dentists.

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Dentists' Economic Confidence

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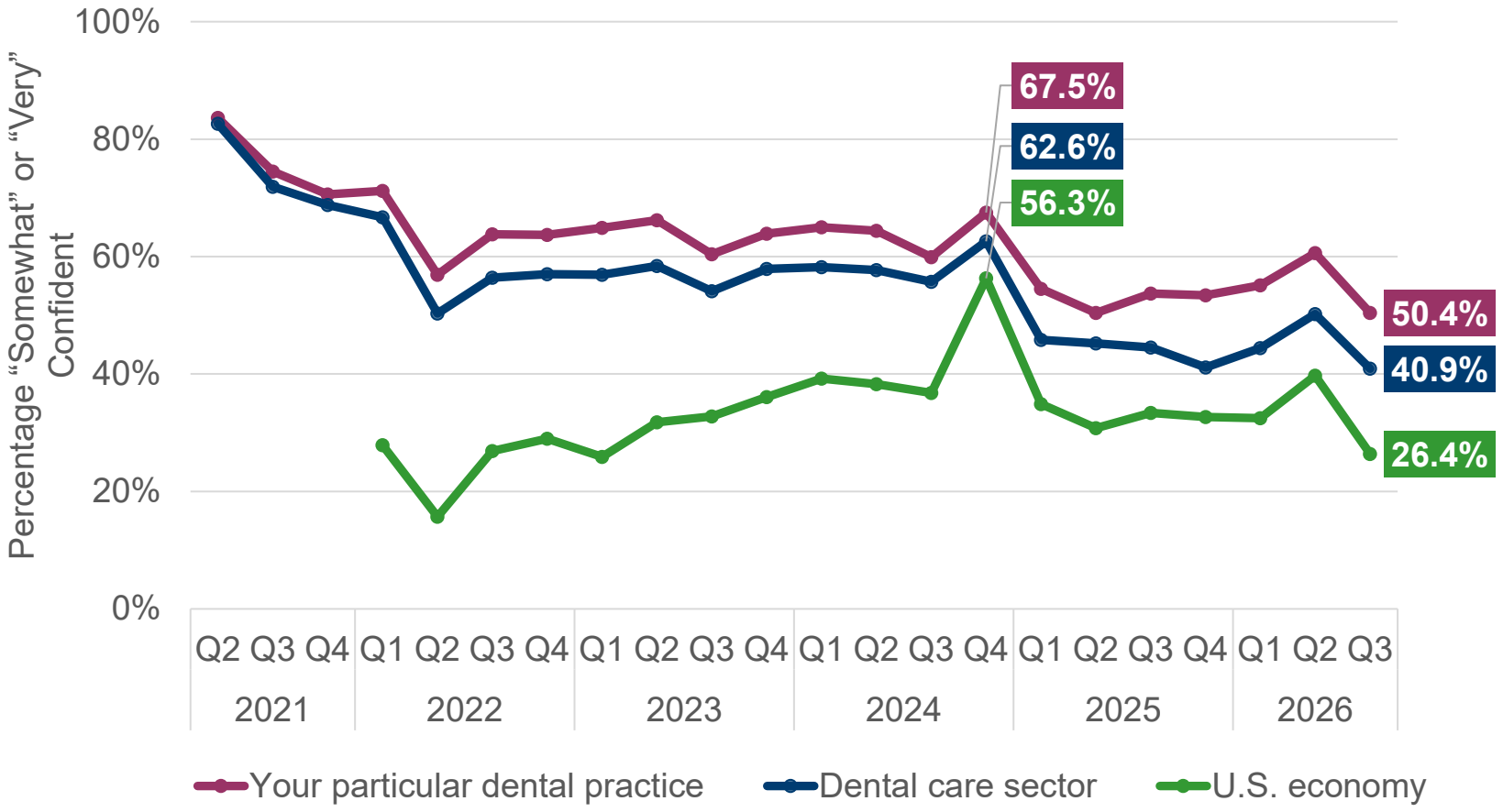
Dentists' Economic Confidence Down



In Q3 2026, dentists' confidence **in their particular practice** and the **dental care sector** took a dive after an uptick since the beginning of the year.

Dentists' confidence in the **overall U.S. economy** is the lowest it has been in several years.

Source: ADA Health Policy Institute

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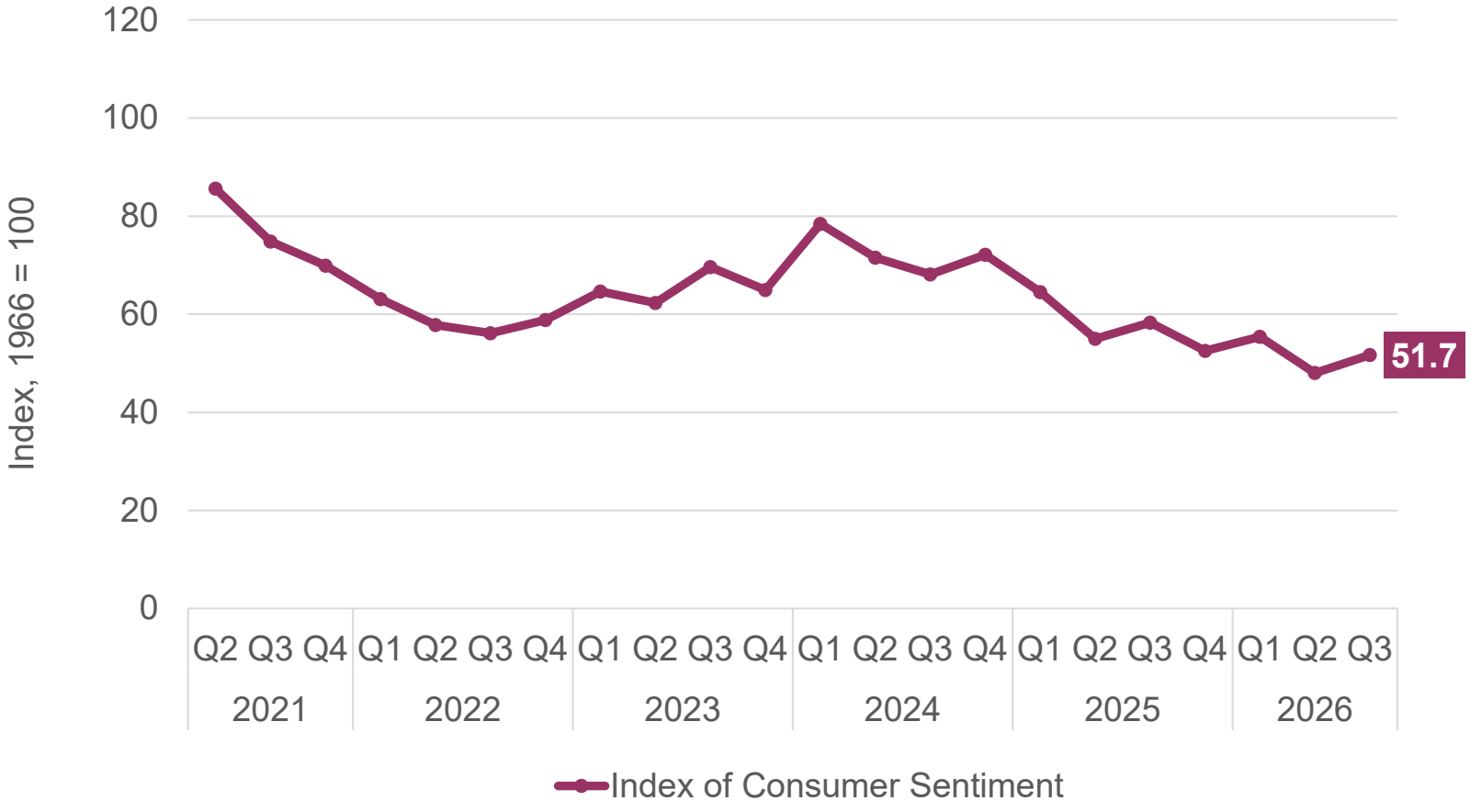
Consumer Economic Confidence Decreasing



In comparison, the index of consumer sentiment measured by the University of Michigan is also near its lowest point since 2021.

Source: University of Michigan

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

More dentists are confident (40.9%) than are skeptical (36.9%) about the dental care sector.
These are the top reasons for a “confident” rating about the dental sector in Q3 2026.

40.9%
Share of Dentists Confident about the Dental Care Sector in Q3 2026

TOP FIVE REASONS FOR CONFIDENCE

1. Dentistry is always needed
2. Strong demand, practice busyness
3. Positive economic outlook in general
4. Patient awareness/value of oral health
5. Economic resilience of dental sector

Source: ADA Health Policy Institute

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

WHAT DENTISTS ARE SAYING…

"Patients seem to value dental care more these days."

"We are busier than last year and schedules are full."

"I believe the overall economy will continue to improve."

"The dental care sector is very resilient, even in tough times."

"People have oral health needs regardless of the economy. Bread and butter dentistry seems to always have a demand."

"Dental care, like other health care, will always be needed in some form."

Source: ADA Health Policy Institute

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

More dentists are confident (40.9%) than are skeptical (36.9%) about the dental care sector.
These are the top reasons for a “skeptical” rating about the dental sector in Q3 2026.

36.9%
Share of Dentists Skeptical about the Dental Care Sector in Q3 2026

TOP FIVE REASONS FOR SKEPTICISM

1. Low reimbursement, insurance pressures
2. Rising practice costs/inflation
3. Patients unwilling/unable to prioritize dental care
4. U.S. economic downturn
5. Uncertainty due to current administration or war

Source: ADA Health Policy Institute

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

WHAT DENTISTS ARE SAYING…

“The dental benefit reimbursement levels have not changed and in some instances gone down.”

“… private dental practices are having insurance fee schedules lowered to pre-2022 levels – this will decapitate us!”

"Staff costs have completely outpaced our reimbursements.”

“Gas and food prices are too high for patients to pay for dental work.”

“Dental care follows the economy. As things get more expensive, dental care becomes a luxury that many people will forgo.”

“People are deferring treatment due to their personal financial constraints.”

Source: ADA Health Policy Institute

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Consumer Dental Spending

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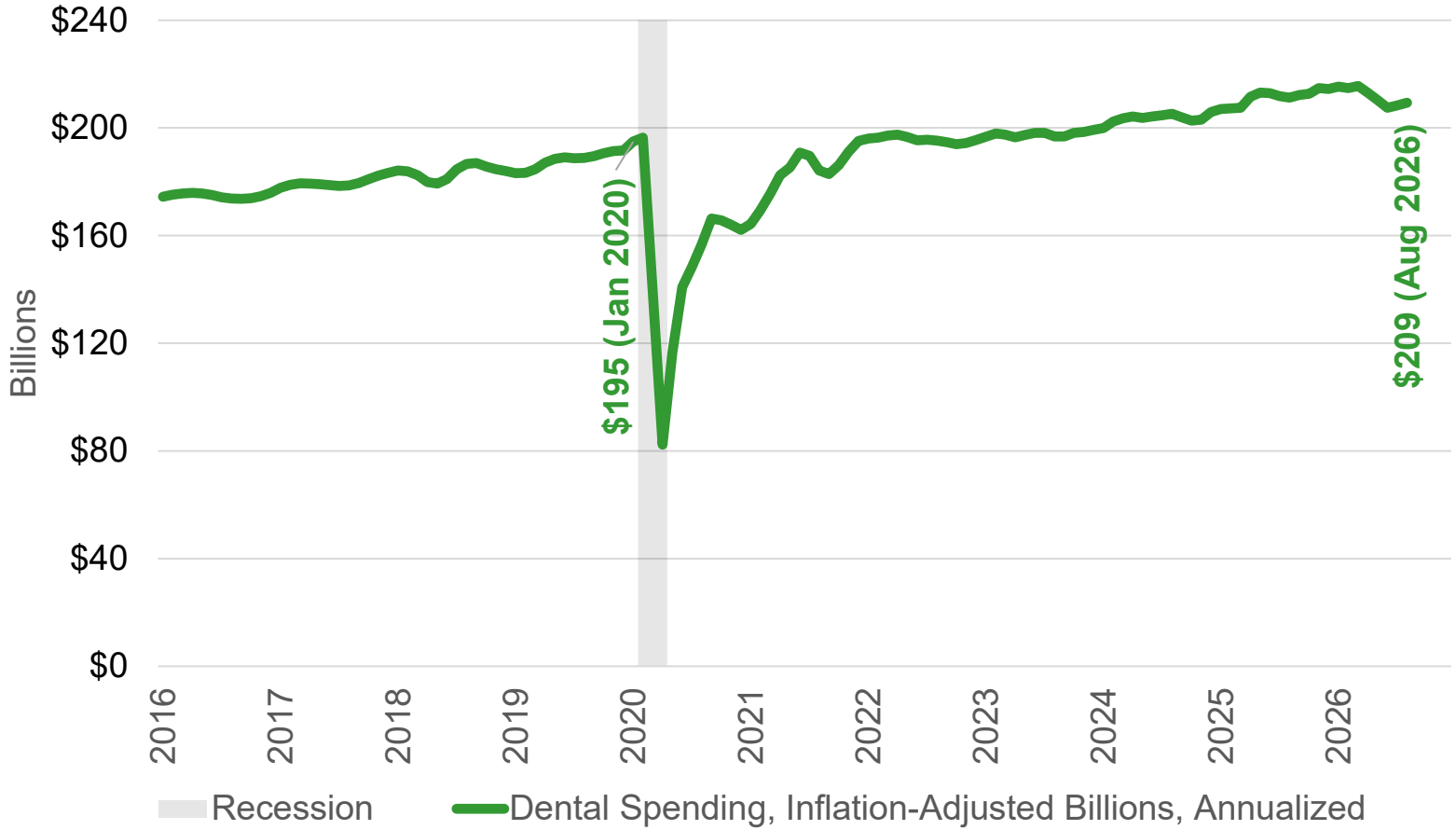
Consumer Dental Spending Sluggish



In August 2026, consumer dental spending was:

- Up 0.5% from month prior
- Down 2.4% year-to-date
- Down 0.9% from 12 months prior
- Up 7.4% from pre-pandemic

Source: Bureau of Economic Analysis. Note: Adjusted for inflation, 2026 dollars. On Sep. 30, 2026, BEA released revised estimates for 2021 through 2026.

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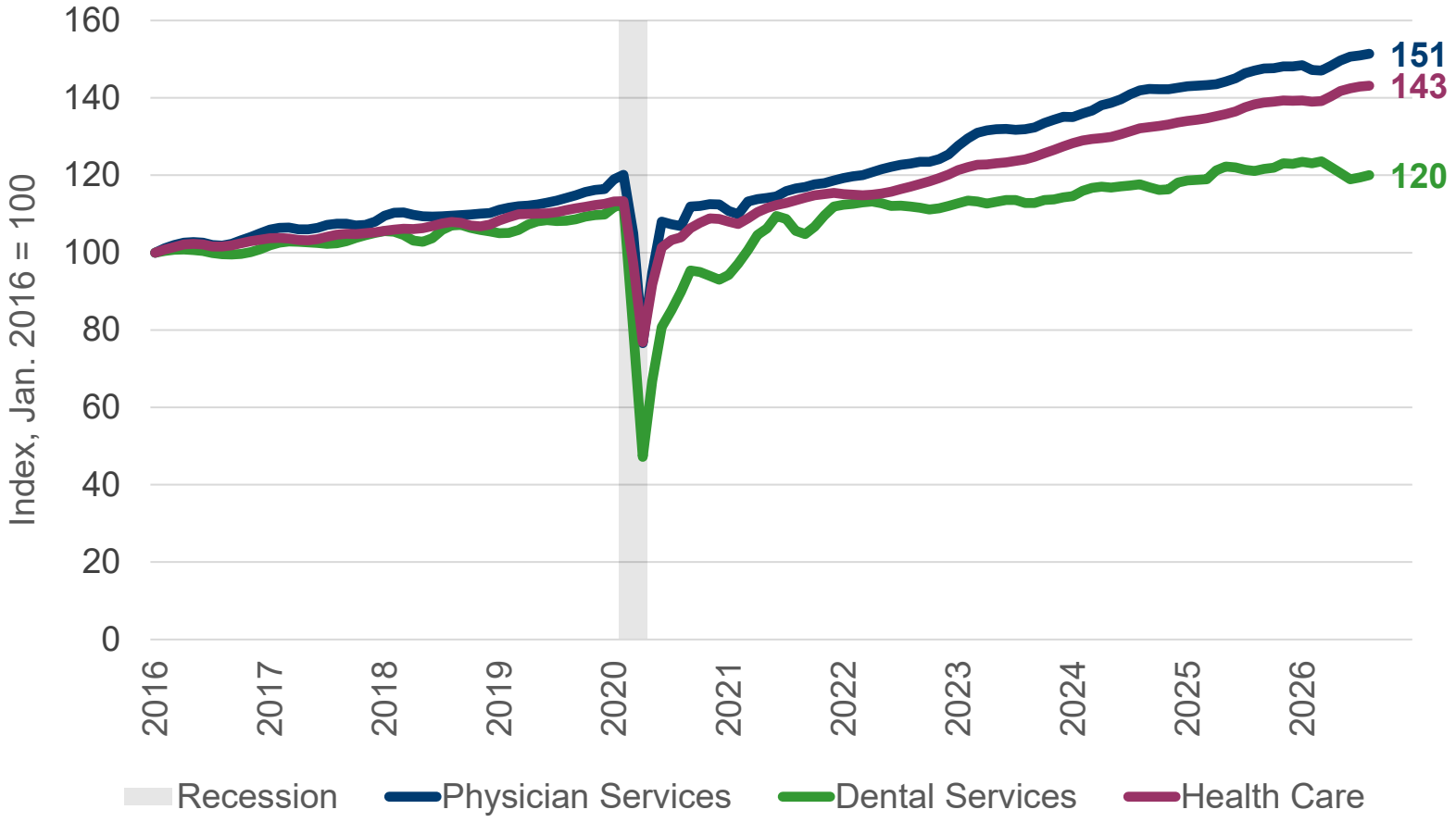
Dental Spending Lags Health Care Spending



Consumer dental spending continues to lag health care spending overall.

Over 10 years, consumer spending on:

- **physician services** is up by 51%
- **health care** is up by 43%
- **dental services** is up by 20%, and the gap is widening

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

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Dental Practice Economics

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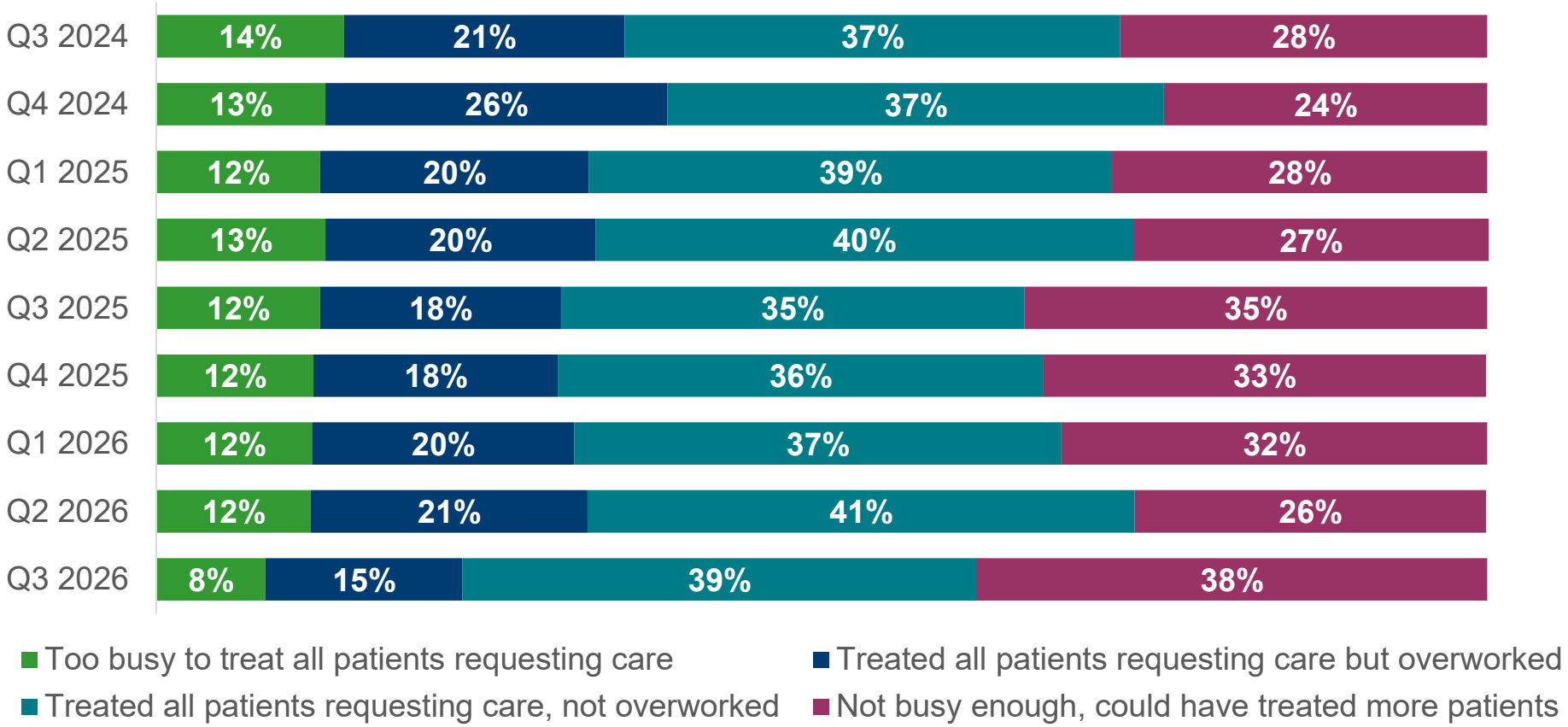
Dentists Less Busy



In Q3 2026, nearly two out of five dentists reported being **not busy enough,** up from around one-quarter in Q2. The share of dentists reporting being **too busy** and **overworked** is the lowest in years.

Source: ADA Health Policy Institute

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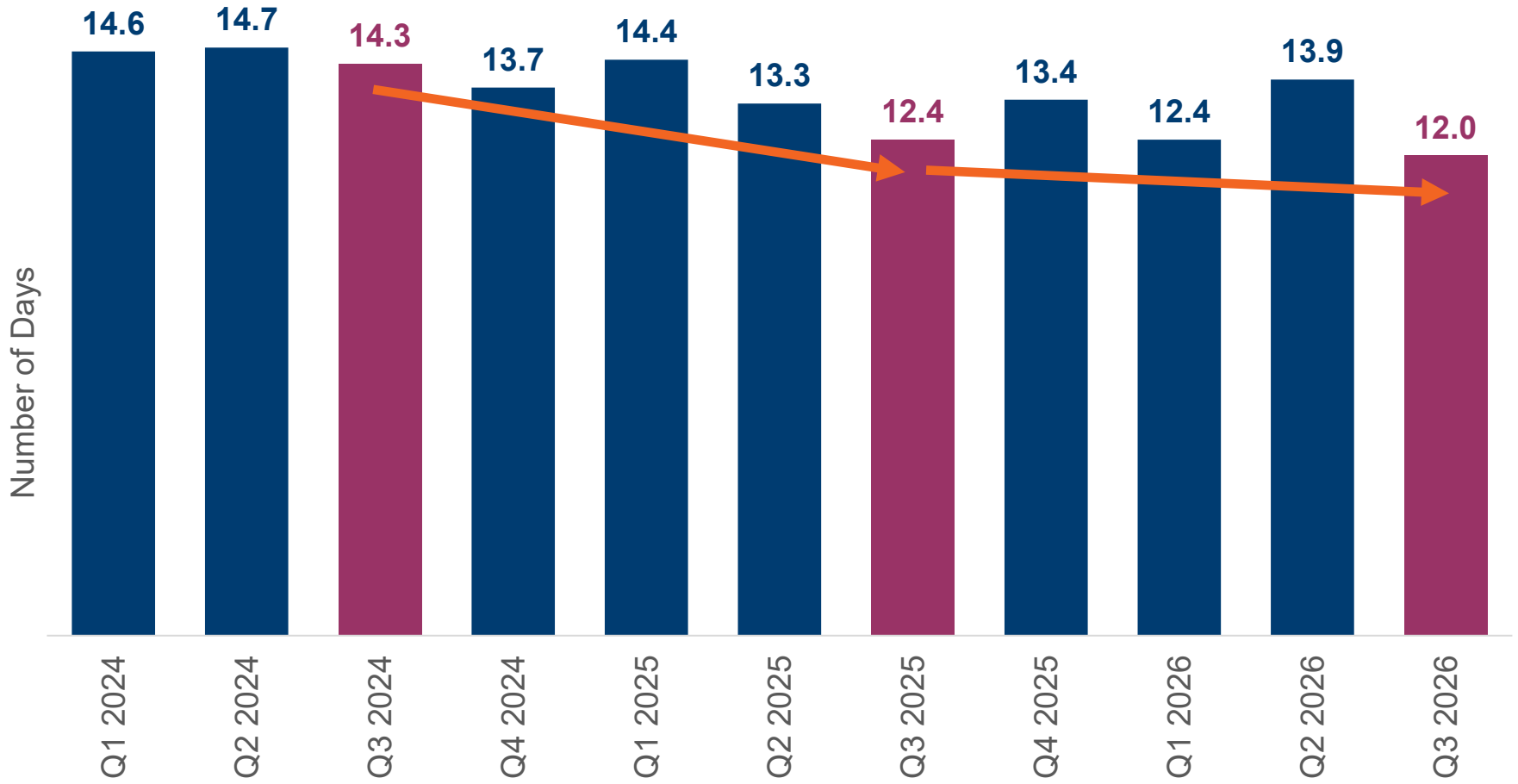
Appointment Wait Times Down



Appointment wait times for new patients reached a new low in Q3 2026 to an average of 12 days, slightly down from 12.4 days in Q3 2025 and 14.3 days in Q3 2024.

Source: ADA Health Policy Institute

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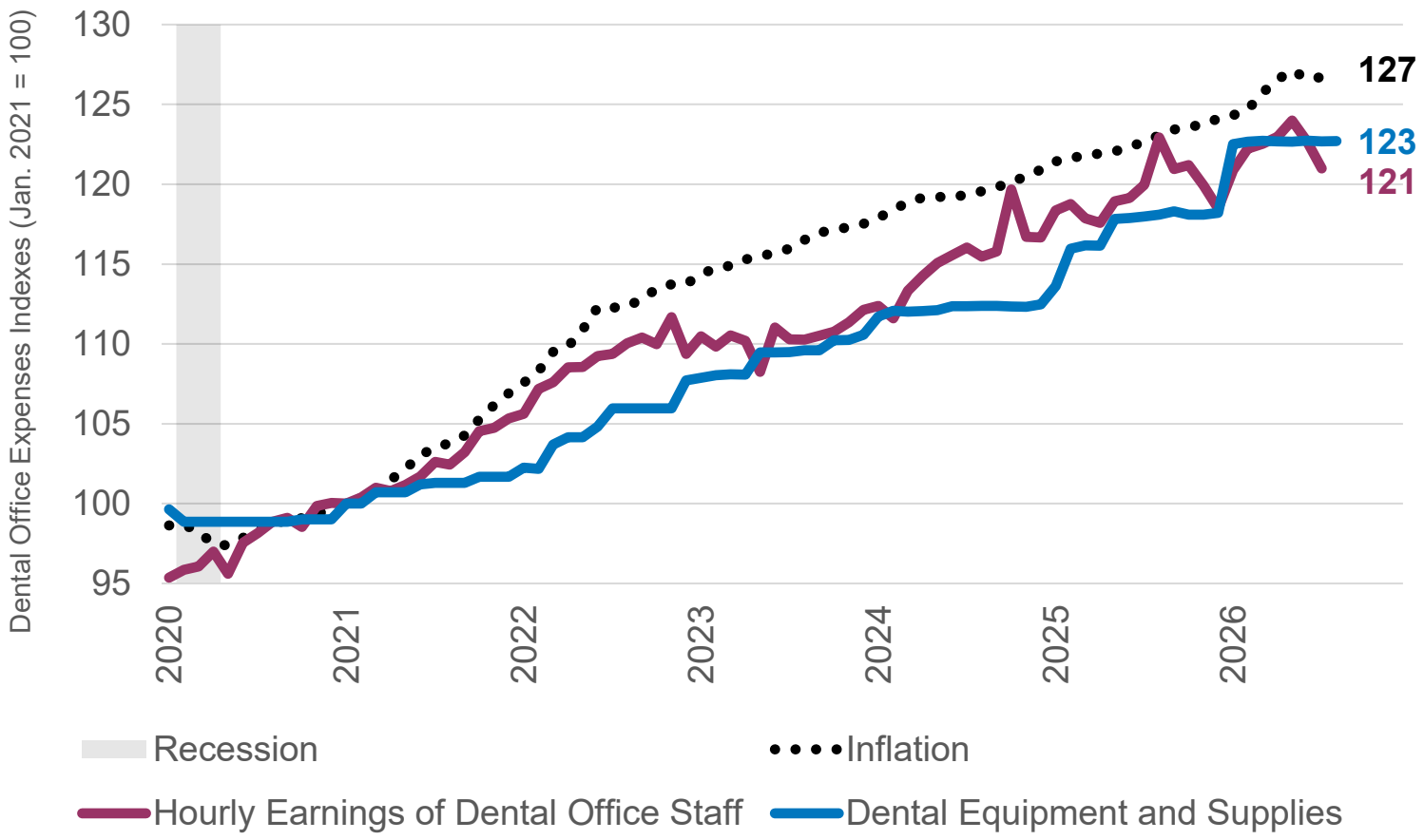
Dental Practice Expense Price Index Up Slightly



From January through August of this year, prices for dental equipment and supplies increased by 0.2%. Hourly earnings of dental office staff increased by less than 0.1%. During the same period, overall inflation has been 2.3%.

Since January 2021, prices for dental equipment and supplies increased by 23%. Hourly earnings of dental office staff increased by 21%. During this period, overall inflation has been 27%.

Source: U.S. Bureau of Labor Statistics

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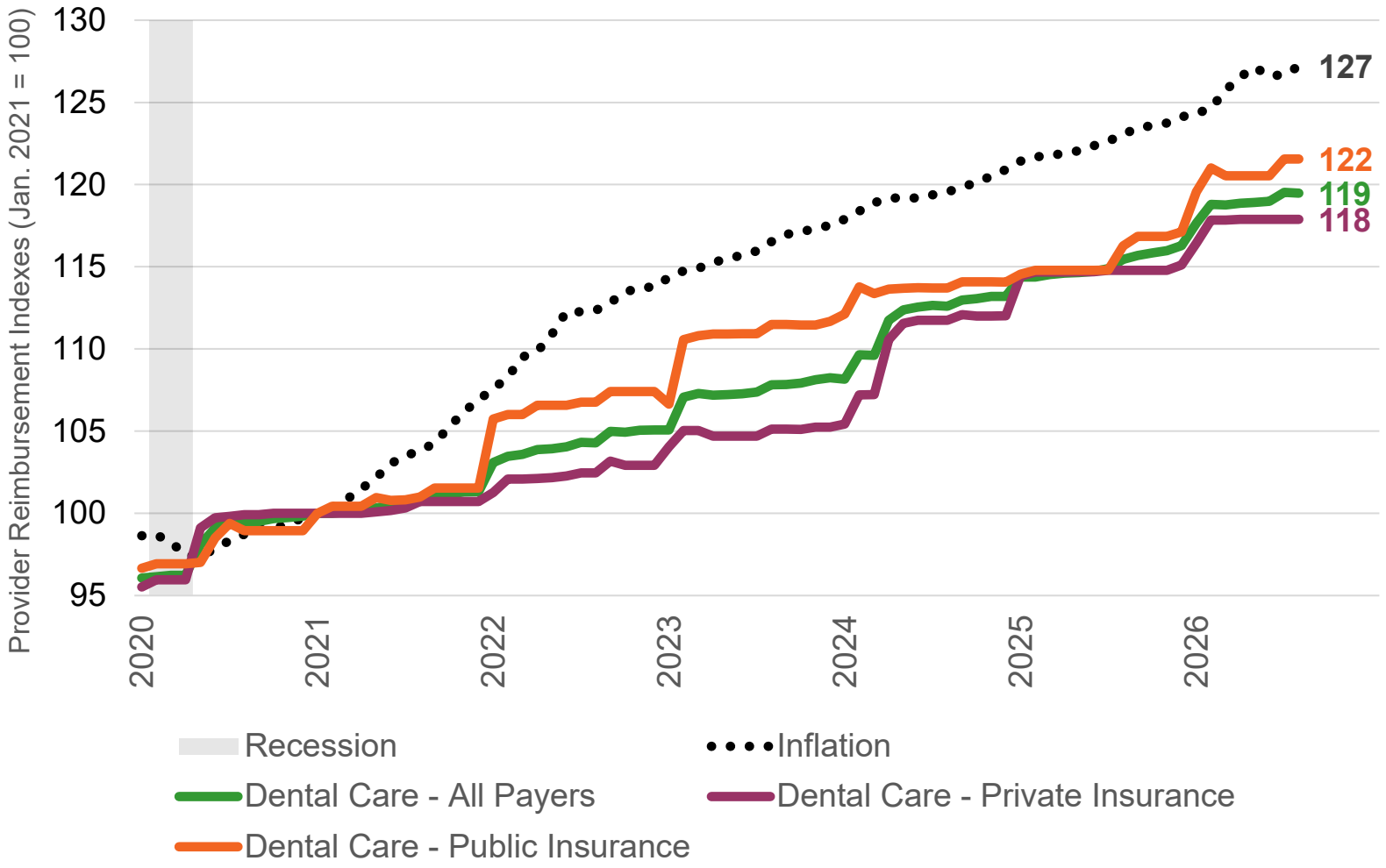
Reimbursement Rate Index Lagging Inflation

From January through August of this year, the reimbursement rate index, averaged across all payer types, increased by 1.5% while inflation was 2.3%.

Since January 2021, it increased by 19% while inflation was 27% over this time frame.



Source: U.S. Bureau of Labor Statistics

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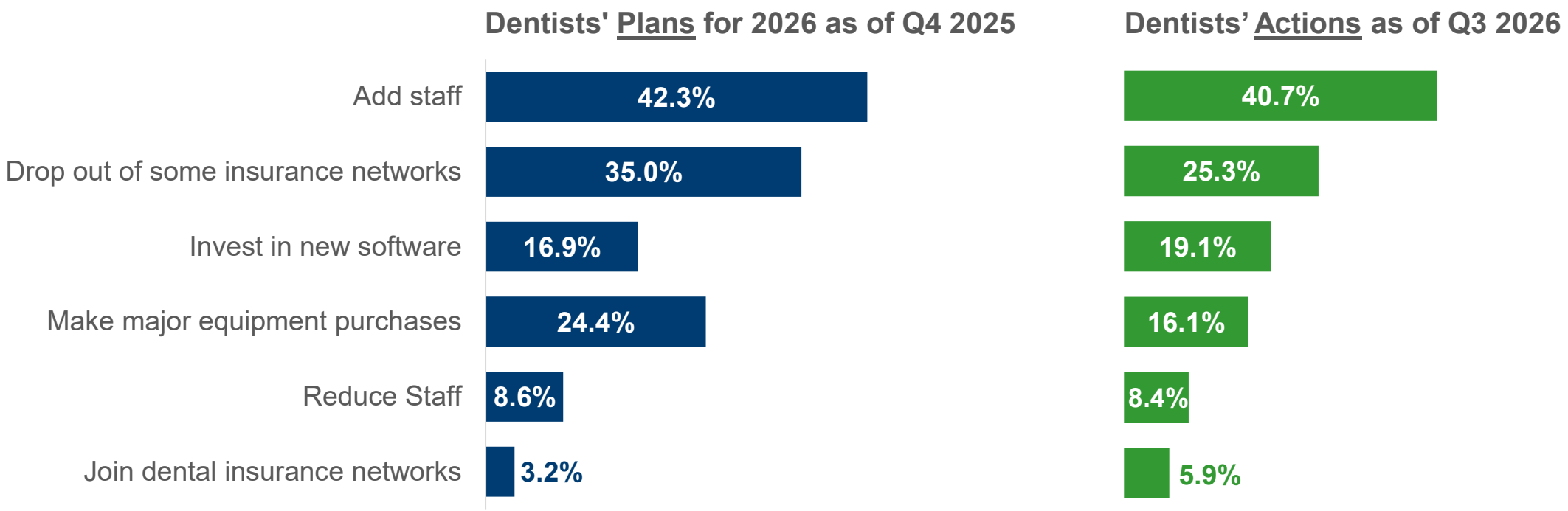
Dentists' Intentions vs. Actions in 2026



At the end of 2025, dentists were asked about **their plans for 2026**. **As of Q3 2026**, dentists are moving towards their plans for the year and have already surpassed their intentions for new software investments and joining dental insurance networks.

Source: ADA Health Policy Institute

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Dental Jobs Market

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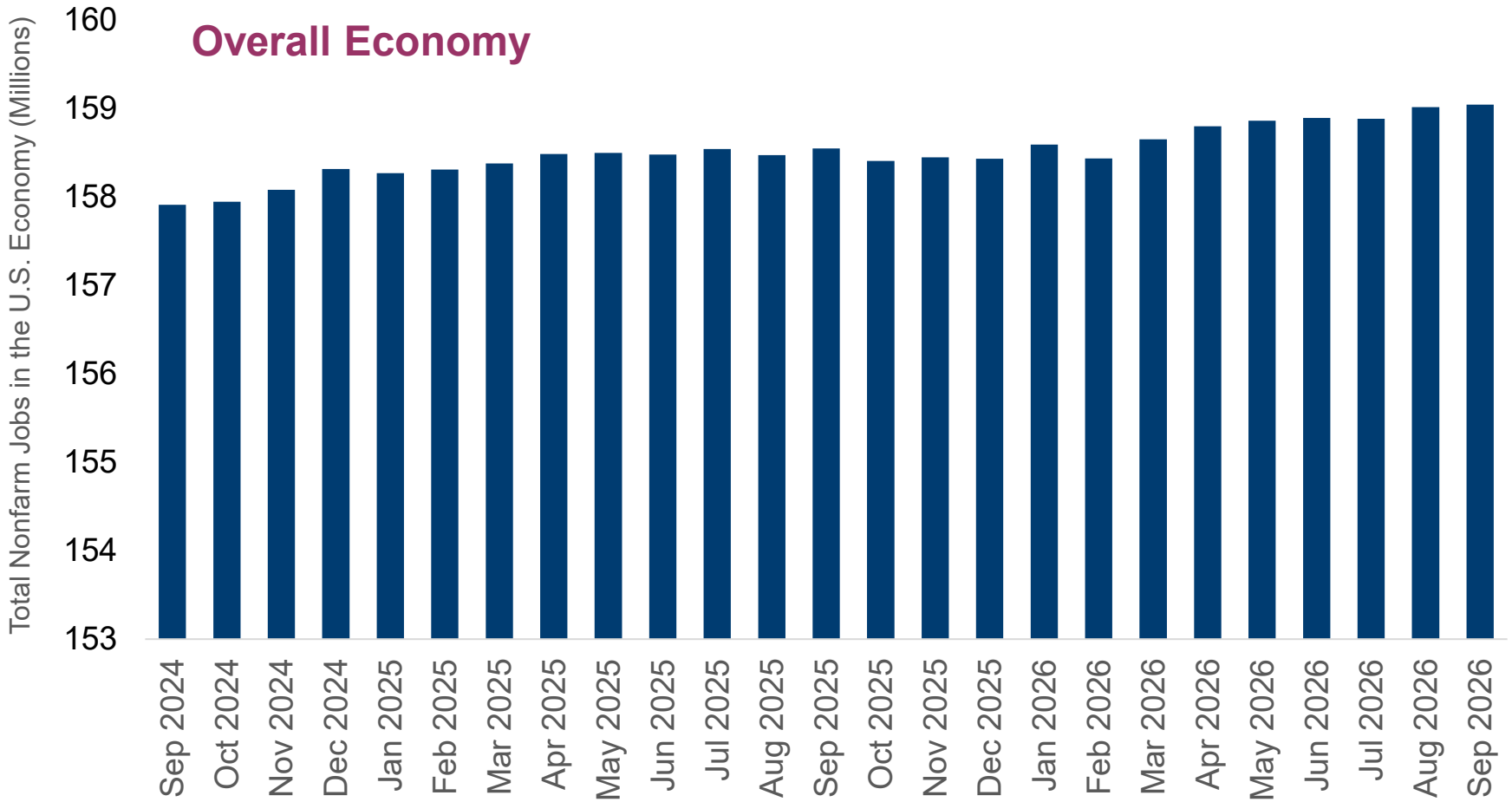
U.S. Economy Job Growth Up 0.3% in 12 Months



The number of jobs in the U.S. economy in September 2026 was:

- Up less than 0.1% from month prior
- Up 0.4% year-to-date
- Up 0.3% from 12 months prior

Source: U.S. Bureau of Labor Statistics

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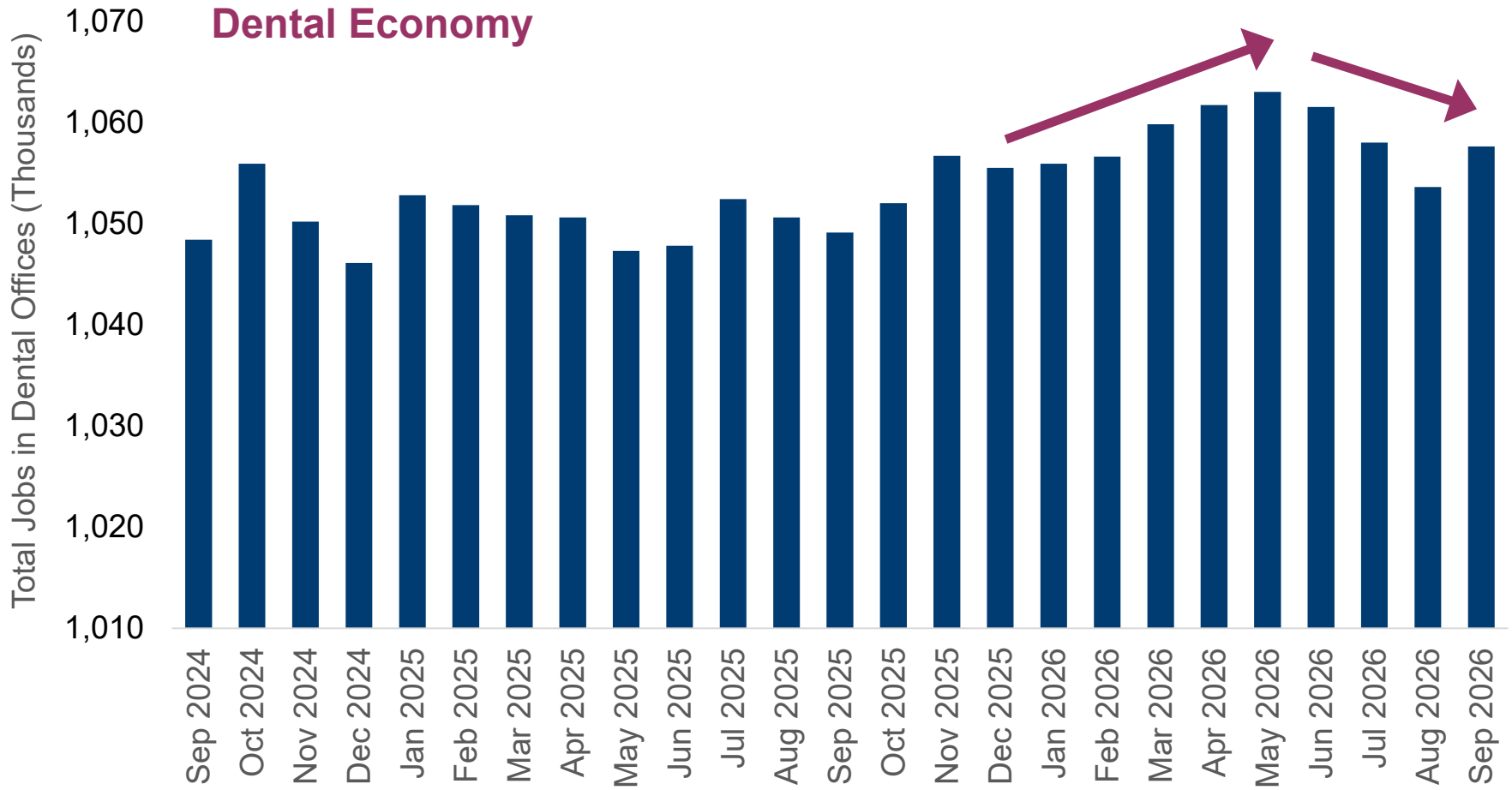
Dental Sector Jobs Down From May Peak



The number of jobs in the dental sector in September 2026 was:

- Up 0.4% from month prior
- Up 0.2% year-to-date
- Up 0.8% from 12 months prior

Source: U.S. Bureau of Labor Statistics

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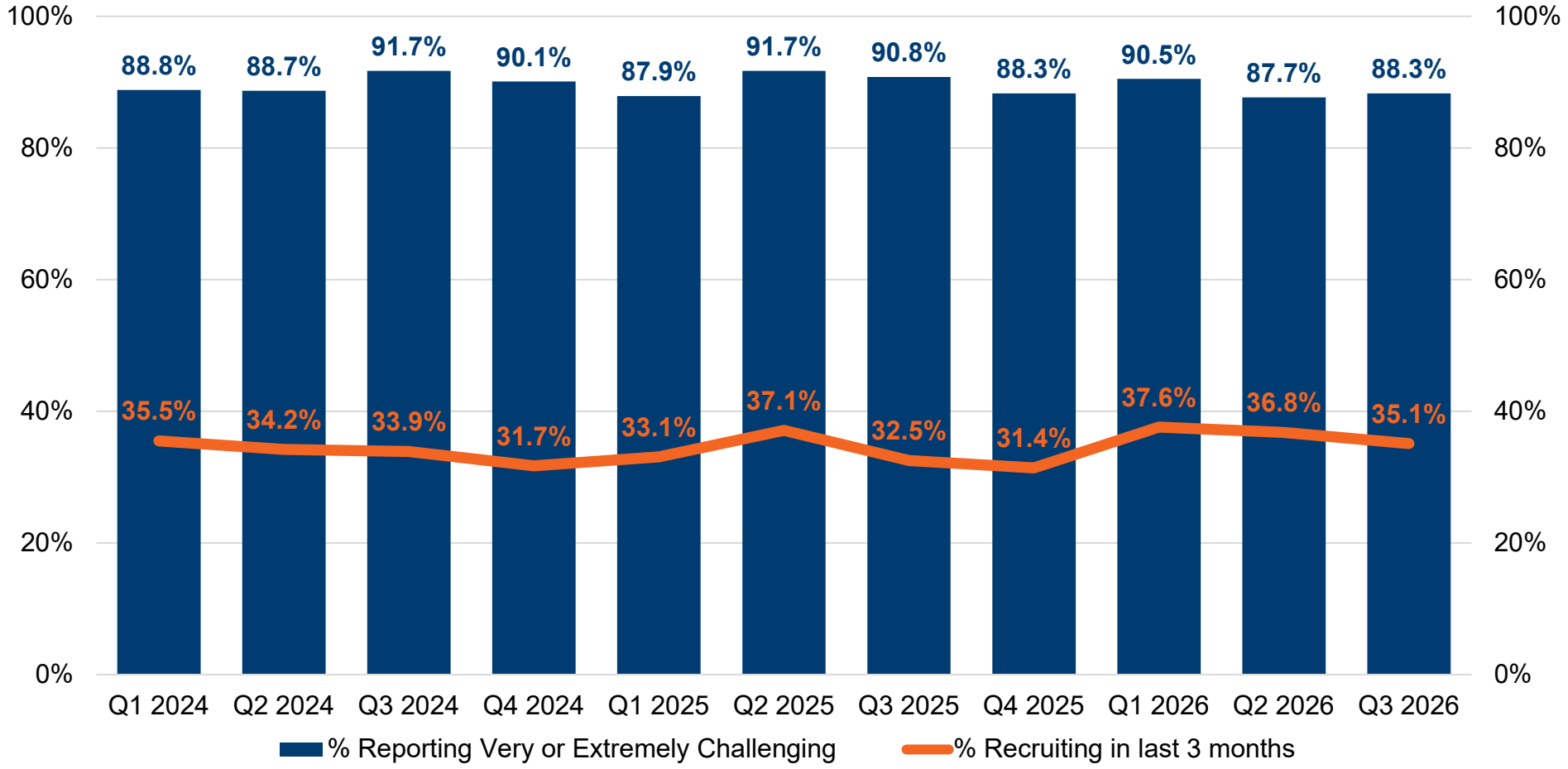
Dental Hygienists Hard to Recruit



Around one-third of dentists were recruiting dental hygienists in Q3 2026. Among these dentists, the vast majority report recruiting hygienists is “very” or “extremely challenging.” This trend has been consistent for more than two years.

Source: ADA Health Policy Institute

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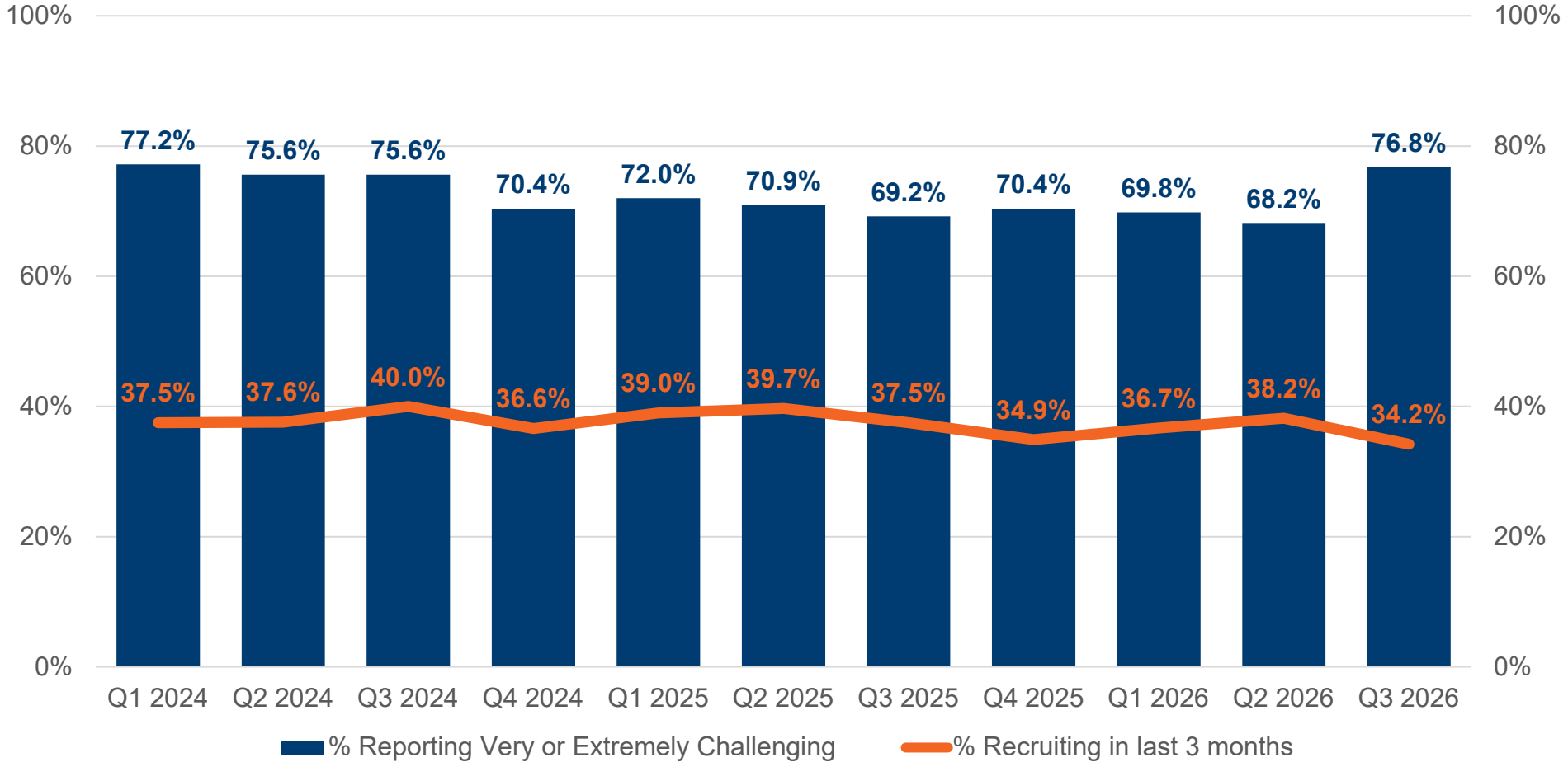
Dental Assistants Slightly Less Difficult to Recruit



In Q3 2026, about a third of dentists reported trying to recruit dental assistants. Dentists' perceived difficulty of recruiting assistants went up in Q3 2026, nearly equal to a high point seen in early 2024.

Overall, however, assistants are perceived as less difficult to recruit than hygienists.

Source: ADA Health Policy Institute

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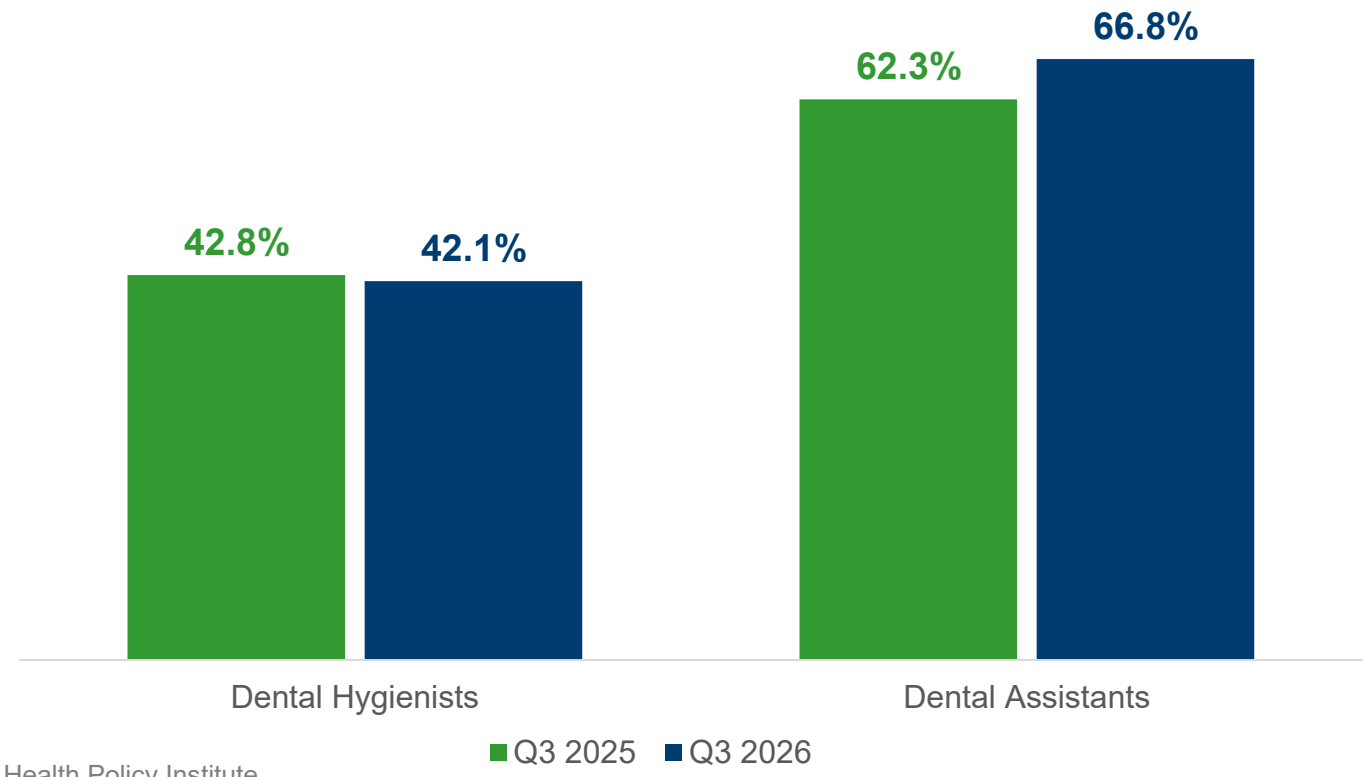
Two out of Five Dentists Have Filled Hygienist Roles



In both Q3 2025 and Q3 2026, among dentists who were recruiting in the prior three months, only two out of five filled the open hygiene position compared to around two-thirds of dentists recruiting dental assistants.

Hiring challenges have not changed in the past 12 months.

Source: ADA Health Policy Institute

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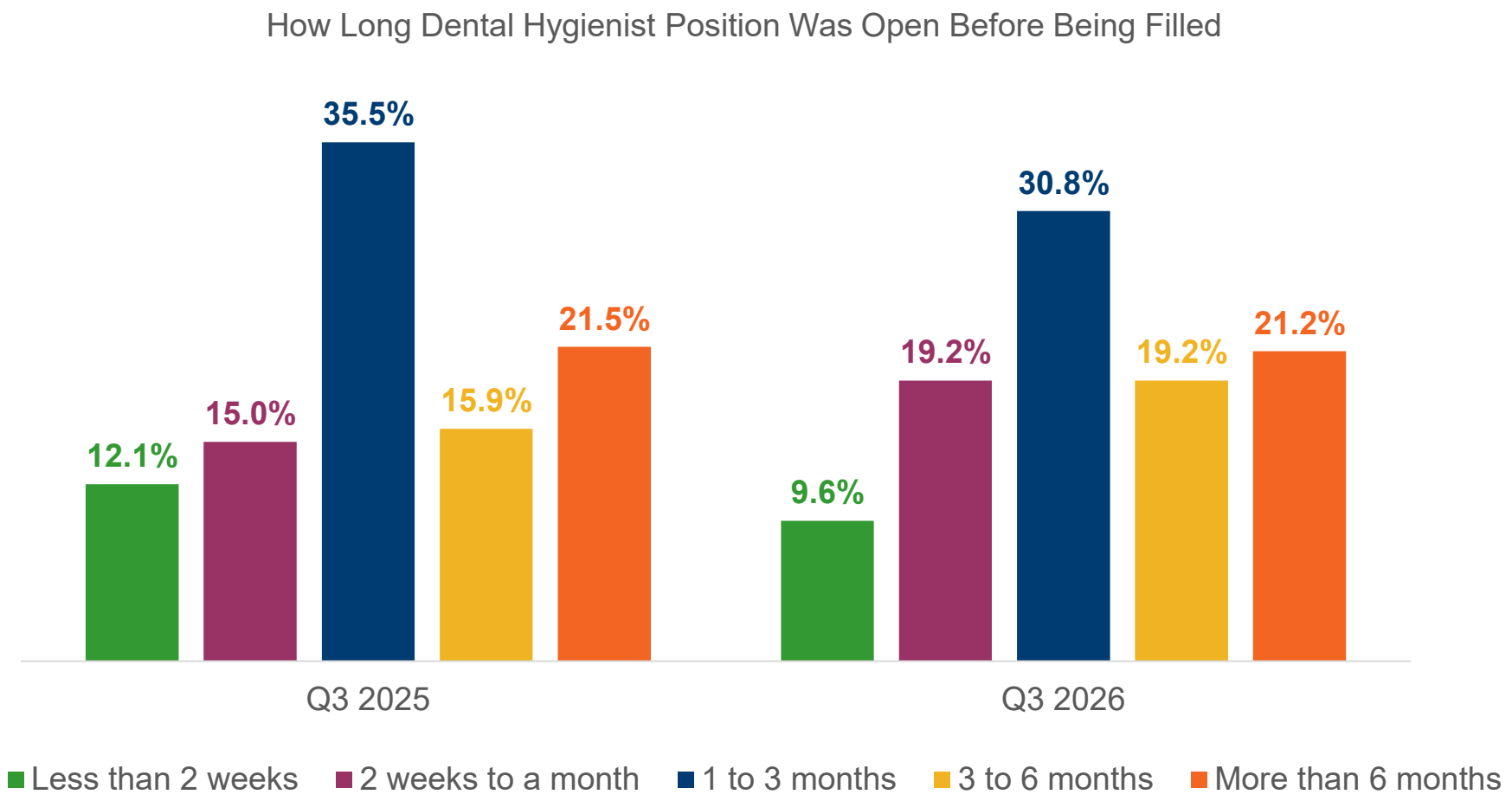
Some Hygienist Positions Unfilled for 6+ Months



One-fifth of dentists report that hygienist positions had been open for more than six months prior to being filled.

This is roughly in line with the situation from a year ago.

Source: ADA Health Policy Institute

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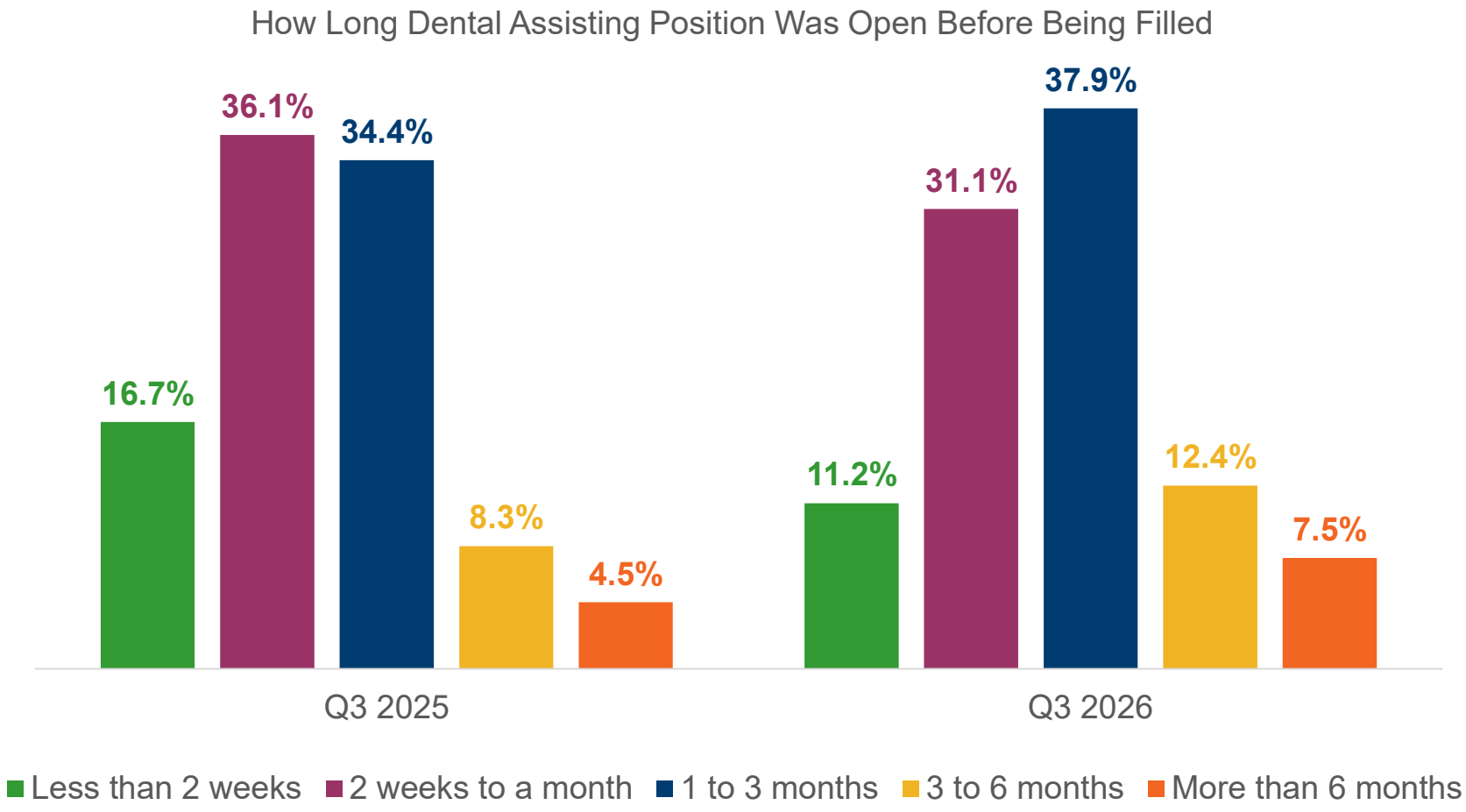
Assistant Positions Open for Shorter Periods of Time



Dental assistant positions are easier to fill than hygienist positions.

Assistant positions took slightly longer to fill compared to a year ago.

Source: ADA Health Policy Institute

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Key Takeaways for Q3 2026

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Key Takeaways – the Dental Economy

Dentists' economic confidence levels are down. Following a slight uptick since the beginning of the year, dentists reported lower economic confidence levels in their own practice, the dental sector, and the overall U.S. economy. The main reasons for skepticism with the dental sector are insurance reimbursement issues, rising costs and inflation, patients not prioritizing dental care, and the general U.S. economic downturn.

Dentists are less busy, and dental spending is down. Consumer spending on dental care is down 2.4% so far this year. Decreasing dental spending may be reflective of fewer patients going to the dentist, fewer patients accepting treatment plans, and lower reimbursement. Two out of five dentists reported in Q3 that they are not busy enough and could treat more patients, up from one-quarter in Q2. Appointment wait times are down as well.

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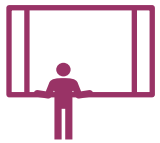
Key Takeaways – the Dental Economy

The 'fiscal squeeze' within dental practices continues. Since January of this year, for example, inflation is at 2.3% while reimbursement rates to dentists have increased by 1.5%. Prices for common dental practice expense items continue to increase. Dentists continue to face a 'fiscal squeeze' within their practices.

Staffing shortages have not eased much within the past year. Around one-third of dentists are actively recruiting dental hygienists and dental assistants, with hygienists being the most difficult to recruit. One out of five dental practices report hygienist positions being open for more than six months – very similar to the situation one year ago. The dental jobs landscape has changed little.



Big picture, the Q3 data point to a more sluggish dental economy. The combination of stalling patient spending, economic uncertainty, a dip in dentist busyness, persistent staffing shortages, and a continued 'fiscal squeeze' on the bottom line have led to a decline in economic confidence among dentists. We will closely monitor the data to see if things rebound in Q4.

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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

- **Slide 5**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q3 2026. Unpublished data. Based on 704 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, Q3 2026. Unpublished data. Based on 704 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.

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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, 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 Sep. 30, 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 Sep. 30, 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 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 Sep. 30, 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 Sep. 30, 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 Sep. 30, 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 15-16**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q3 2026. Unpublished data. Based on 704 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 Sep. 11, 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 Sep. 10, 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 Sep. 11, 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 Sep. 10, 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.

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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 Sep. 10, 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 Sep. 11, 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 Sep. 10, 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 19**

  Sources: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q4 2025 and Q3 2026. Unpublished data. Based on 786 (Q3 2025) and 704 (Q3 2026) 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 as of Q3 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.”

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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 Oct. 2, 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 Oct. 2, 2026.

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Data Sources and Methods

Dental Jobs Market

- **Slides 23-24**

  Source: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q3 2026. Unpublished data. Based on 704 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

Dental Jobs Market

- **Slides 25-27**

  Sources: ADA Health Policy Institute, Economic Outlook and Emerging Issues in Dentistry Poll, Q3 2025 and Q3 2026. Unpublished data. Based on 770 (Q3 2025) and 704 (Q3 2026) responses from dentists in private practice.

  Notes for Slide 25: Data represent those who answered the question, “If recruiting dental hygienists or dental assistants, have you filled the positions(s)?" Responses include dentists who selected "Yes."

  Notes for Slides 26-27: 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 positions(s)?"

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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 middle 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 Q3 2026, survey invitations were sent September 14 to 2,422 panel dentists; 750 responded for an adjusted response rate of 31.2% (excluding undeliverable email addresses). Of these, 704 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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