



2026 Orthodontic Data Trends + Insights

The Latest Practice Growth Metrics to Build Your Practice's Success



Table of Contents

Intoduction	3
2026 Industry Outlook	4
How to Use This Guide	5
Part 1: Production & Collections	7
Part 2: Exams & Starts	12
Part 3: Schedule	18
Part 4: Treatment Efficiency	20
Conclusion	22

Introduction

Orthodontics is entering 2026 with a familiar mix of momentum and recalibration. On the momentum side, practices are producing more year over year, new patient flow is steady to slightly up, and efficiency is improving—many teams are generating more production per doctor hour than they were just a few years ago. At the same time, the market is asking practices to work smarter: case acceptance has softened compared to earlier highs, collection performance isn't fully keeping pace with production, and the financial “middle” of treatment demand appears to be widening.

What stands out most in this year's data is the rise of intentional strategy. We're seeing clear signals that practices are leaning into more resilient growth engines—especially referral relationships—and modernizing how revenue is captured through autopay and improved receivables management. Treatment mix is also evolving, with a noticeable shift back toward braces and appliances after several years of aligner expansion. Together, these shifts paint a picture of an industry that's still growing, but doing so with sharper focus on profitability, predictability, and patient value.

This report highlights the most meaningful year-over-year changes across production, pricing, starts, conversion, referrals, payments, and AR—so you can benchmark where the industry is heading and identify the levers that matter most for 2026.

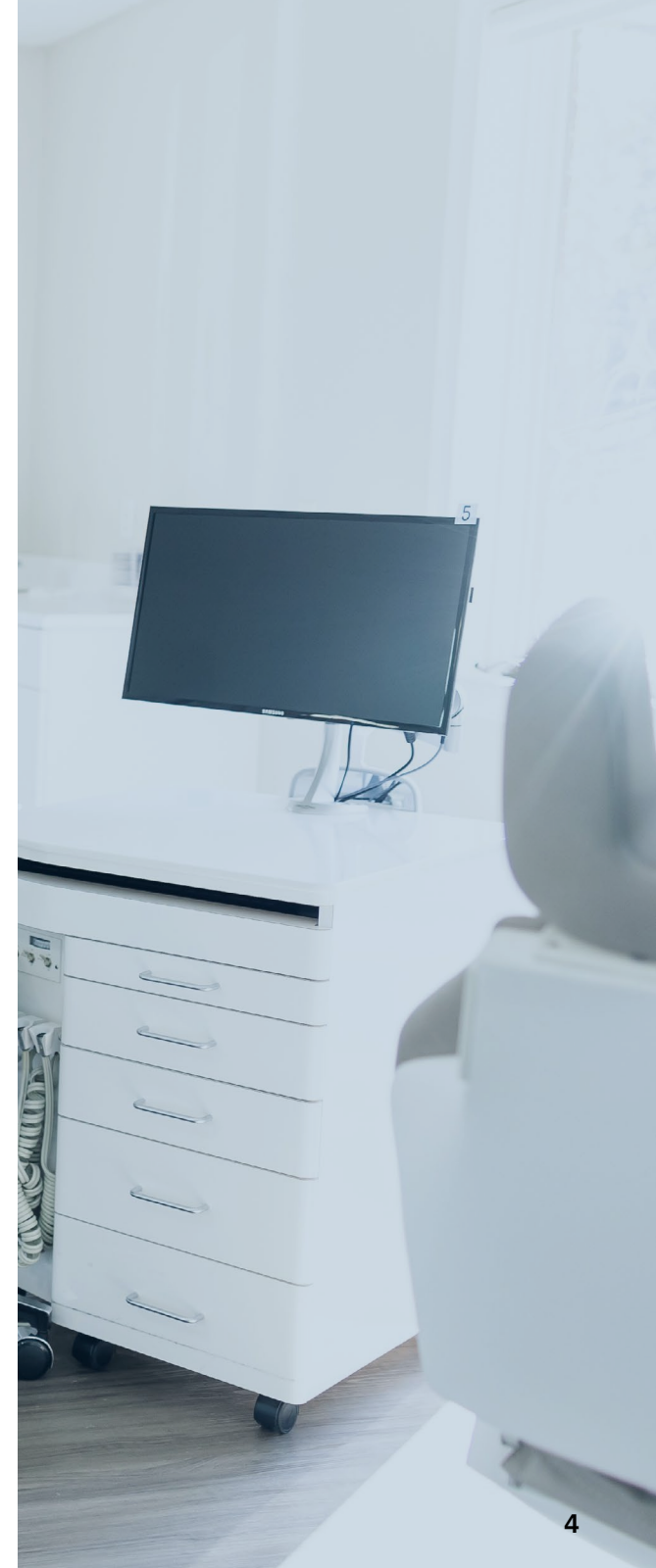


2026 Industry Outlook

Looking ahead, 2026 is shaping up to be a year where sustainable growth beats headline growth. Production is trending upward, but practices that win will be the ones that protect the path from consultation to cash: strengthening case acceptance through clearer treatment tiering and financing options, tightening collections processes, and reducing leakage between net production and net collection. Expect continued pricing discipline as fees remain elevated, while patients become more selective—making communication, trust, and value framing just as important as clinical outcomes.

Operationally, the playbook will keep shifting toward efficiency and predictability. The data signals growing adoption of lower-friction payment methods like ACH autopay, alongside improving delinquency rates even as AR balances rise. Meanwhile, the modality mix suggests aligners will remain a critical offering—but not the default answer for every case—creating opportunities for practices that can confidently match patient goals with the right clinical approach. And with referrals accelerating, especially from doctors, relationship-based growth (GP outreach, co-marketing, and service consistency) is poised to be one of the most reliable demand drivers in 2026.

Net-net: 2026 will reward practices that build a tighter system—convert well, collect well, and deliver care through an efficient, patient-friendly experience—while staying flexible as patient preferences and treatment mix continue to evolve.



How to Use This Guide

This eBook is designed to help orthodontic practices track, interpret, and act on their data for better decision-making and long-term growth. Each section highlights key performance indicators (KPIs), trends, and actionable insights to help you optimize efficiency, production, and financial health.

KPIs + Benchmarks

The following key performance indicators (KPIs) provide a clear picture of your practice's financial health and operational efficiency:

KPI	Definition / Formula	Benchmark	2025 US Average
Net Production vs. Net Collection	A three-month rolling average of Net Production ÷ a three-month rolling average of Net Collection. Net Collection consistently higher than Net Production usually indicates no growth or a practice in decline.	5-20%	4.10%
Average Contract Amount	Total contract dollars ÷ Total count of all contracts initiated	>\$5,450	\$5,702
Starts Paid in Full	Paid-in-Full Arrangements ÷ Total Number of Contracts. If more than 18% of treatment starts pay in full, an unhealthy cash flow condition can exist in the practice.	<18%	19.5%
Production per Doctor Hour	Net Production ÷ Total Doctor hours	>\$1,850	\$1,852
Production per Staff Hour	Net Production ÷ Total Staff hours	>\$175	\$167
New Patient Calls to Exams	Total Exams ÷ New Pts Added	>90%	79%
Case Acceptance	Treatment Starts (less Phase 2) / Number of Exams Seen	70-80%	67%
Pre-Treatment Obs Patients Seen	Pre-Treatment Observation Patients Seen ÷ Total Pre-treatment Observation Patients	>10%	8%
Between Phases Observation Patients Seen	Between Phases Observation Patients Seen ÷ Total Between Phases Observation Patients	>12%	12%

KPI	Definition / Formula	Benchmark	2025 US Average
Starts from Observation	Starts from Pre-Treatment or Between Phases Observation ÷ Total Treatment Starts	25%	18%
Phase 2 to Phase 1 Starts	Phase 2 Starts ÷ Phase 1 Starts	>80%	50%
Patients Over ECD	Patients over ECD ÷ Total Patients in Active Treatment	<10%	25%
No Show Percentage	Total No Shows ÷ Total Appts Scheduled	<5%	5%
Repair Percentage	Total Repair Visits ÷ Total Appointments Completed	<5%	8%
Retention Percentage	Total Retention Visits ÷ Total Appointments Completed	<7%	4%

Section Breakdown

Each chapter follows a structured breakdown to help you quickly interpret the data:

- **What It Is/Formula:** Defines the metric and how it's calculated.
- **Benchmark:** Industry standards to compare your practice's performance.
- **Trends:** Year-over-year or month-over-month patterns that provide insight.
- **Why It's Important:** Explains how this metric impacts your practice.
- **How to Use the Data:** Actionable steps to improve performance based on trends.

Production & Collections

Net Production vs. Net Collection

What Is It

- **Net Production** is the total amount charged to accounts receivable, minus adjustments like discounts, write-offs, and posting errors.
- **Net Collection** is the actual cash received, factoring in collection adjustments such as refunds, declined payments, and NSF checks.

Recommended
Goal/Benchmark:

5-20%

Net production that's 5%-20% greater than net collection indicates a growing practice. Conversely, net collection consistently higher than net production indicates a growth or decline.

Trend: Production is growing again, but collections are still slightly behind

- Gross production rose from \$3.93M (2024) → \$4.12M (2025) (+4.7% YoY) and is up +25.2% vs 2020.
- Net collection increased \$3.35M → \$3.48M (+3.9% YoY).
- The gap between net production and net collection widened slightly: 3.6% → 4.1% (+0.5 pp YoY).

Trend Takeaway: Practices are producing more year-over-year, but revenue capture still lags production a bit (opportunity in collections workflows, payment compliance, AR follow-up).

FORMULAS

Net Production

= Gross Production less
Production Adjustments

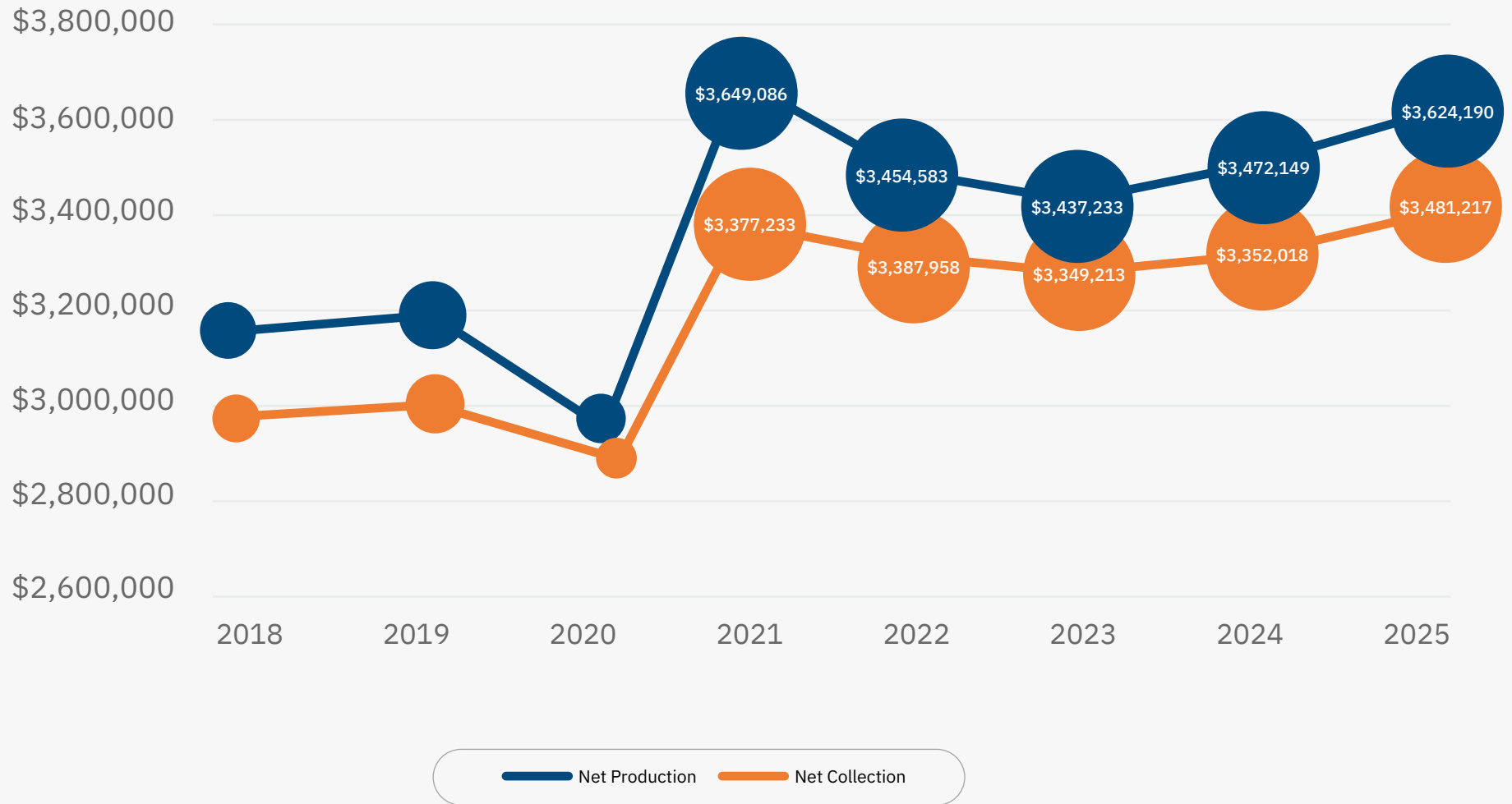
Net Collection

= Gross Collection less
Collection Adjustments

Net Production vs Net Collection

= A three-month rolling
average of Net Production
÷ a three-month rolling
average of Net Collection

Net Production vs. Net Collection



Why It's Important

Net production and net collection are key financial metrics that provide a clear view of a practice's financial health, both short- and long-term. Tracking these trends helps identify seasonal patterns and the best times to adjust marketing strategies.

How to Use the Data

Tracking net collections alone isn't enough. Practices need to analyze trends to catch underlying issues. Visualizing data can clarify patterns and guide better financial decisions.

If net collections consistently exceed net production by more than 5–20%, it signals a potential growth issue. Recognizing this trend early prevents overlooked financial risks.



Average Contract Amount + Fees

What Is It

The Average Contract Amount measures the typical fee a patient agrees to for treatment.

Formula: Total contract dollars ÷ Total count of all contracts initiated

Trend: Fee inflation continues (pricing power remains strong)

Contract and case fees rise steadily over the multi-year window:

- Average contract amount: \$5,155 (2020) → \$5,702 (2025) (+10.6%)
- Average full fee: \$5,931 → \$6,550 (+10.4%)
- Average aligner fee: \$5,660 → \$6,408 (+13.2%)
- Average limited fee: \$2,353 → \$2,992 (+27.2%)

Trend Takeaway: Pricing is climbing across modalities, with especially strong growth in limited-treatment offerings (suggesting demand for “entry” or “budget-flex” options).

Recommended
Goal/Benchmark:

Average Contract Amount

> \$5,450

Contracts + Payments

	2020	2021	2022	2023	2024	2025
Average Contract Amount	\$5,155	\$5,279	\$5,406	\$5,515	\$5,608	\$5,702
Average Patient Initial Fee	\$814	\$842	\$825	\$807	\$808	\$806
Average Full Fee	\$5,931	\$6,038	\$6,200	\$6,342	\$6,424	\$6,550
Average Aligner Fee	\$5,660	\$5,821	\$6,015	\$6,162	\$6,273	\$6,408
Average Phase 1 Fee	\$3,142	\$3,183	\$3,331	\$3,465	\$3,577	\$3,686
Average Phase 2 Fee	\$5,387	\$5,528	\$5,713	\$5,882	\$6,003	\$6,106
Average Limited Fee	\$2,353	\$2,567	\$2,785	\$2,854	\$2,854	\$2,992

How to Use the Data

Keep fees in line with industry trends and adjust them regularly. Evaluating fees by treatment type can reveal their impact on your overall average. While there's no set target for initial payments, tracking trends helps maintain healthy cash flow.

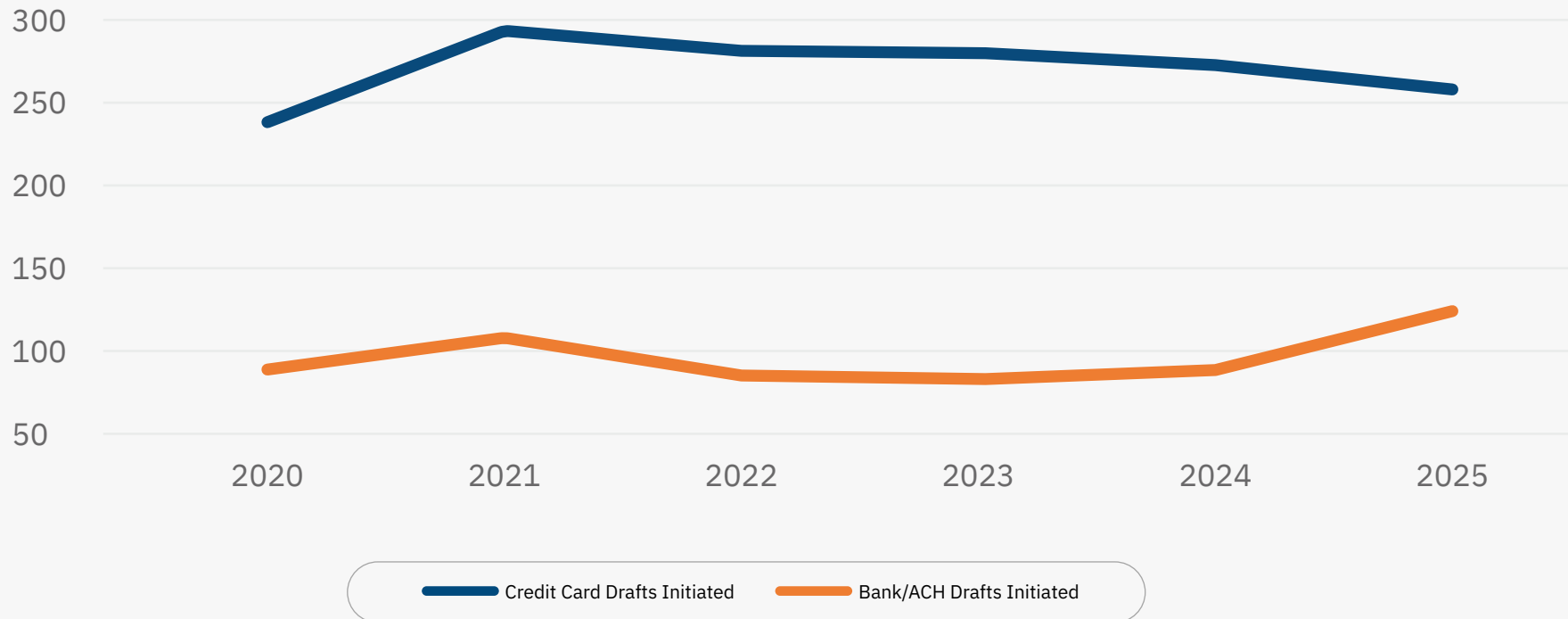
Trend: Payment behavior is shifting toward ACH (lower-cost autopay)

- Bank/ACH drafts initiated: 93 (2024) → 118 (2025) (+26.9% YoY)
- Credit card drafts initiated: 270 → 252 (-6.7% YoY)

Trend Takeaway: Practices (and patients) appear to be moving toward ACH autopay, likely to reduce card processing costs and stabilize collections.

	2020	2021	2022	2023	2024	2025
Credit Card Drafts Initiated	233	294	279	277	270	252
Bank/ACH Drafts Initiated	87	103	90	87	93	118

ACH vs Credit Card Drafts



Exams & Starts

New Patient Adds to Exams

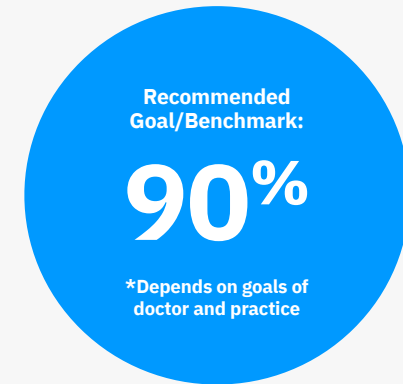
What Is It (Formula)

The percentage of patients who scheduled an exam after calling and then followed through by attending their appointment.

Trend: *New patient demand is stabilizing with a small rebound in 2025*

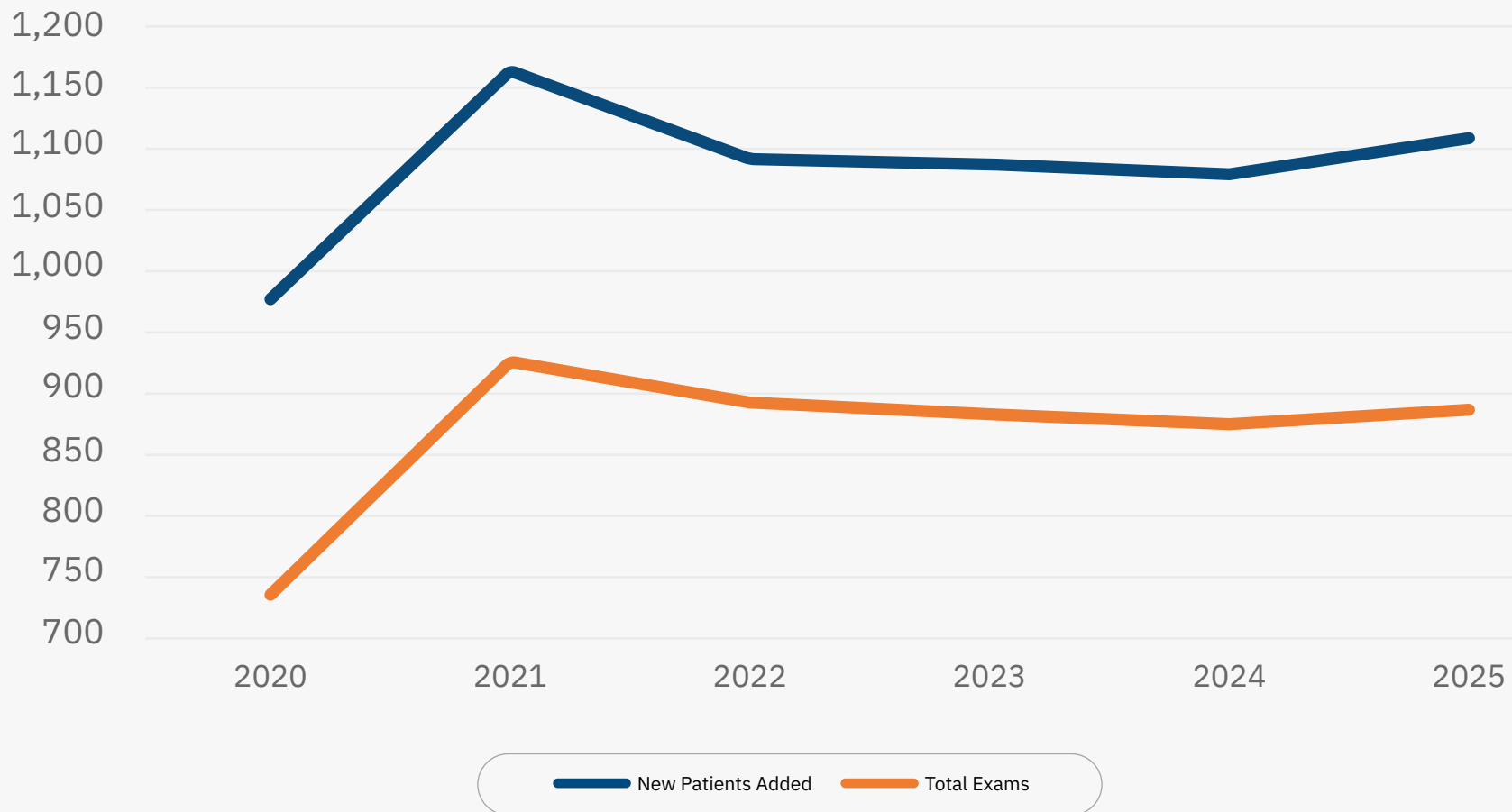
- New patients added: 1,078 (2024) → 1,125 (2025) (+4.4% YoY)
- Total exams: 873 → 893 (+2.3% YoY)

Trend Takeaway: Patient flow looks steady-to-slightly-up in 2025 after a flatter 2022–2024 pattern.



	2020	2021	2022	2023	2024	2025
New Patients Added	966	1,164	1,090	1,082	1,078	1,125
Total Exams	741	942	890	881	873	893

New Patient Adds to Exams



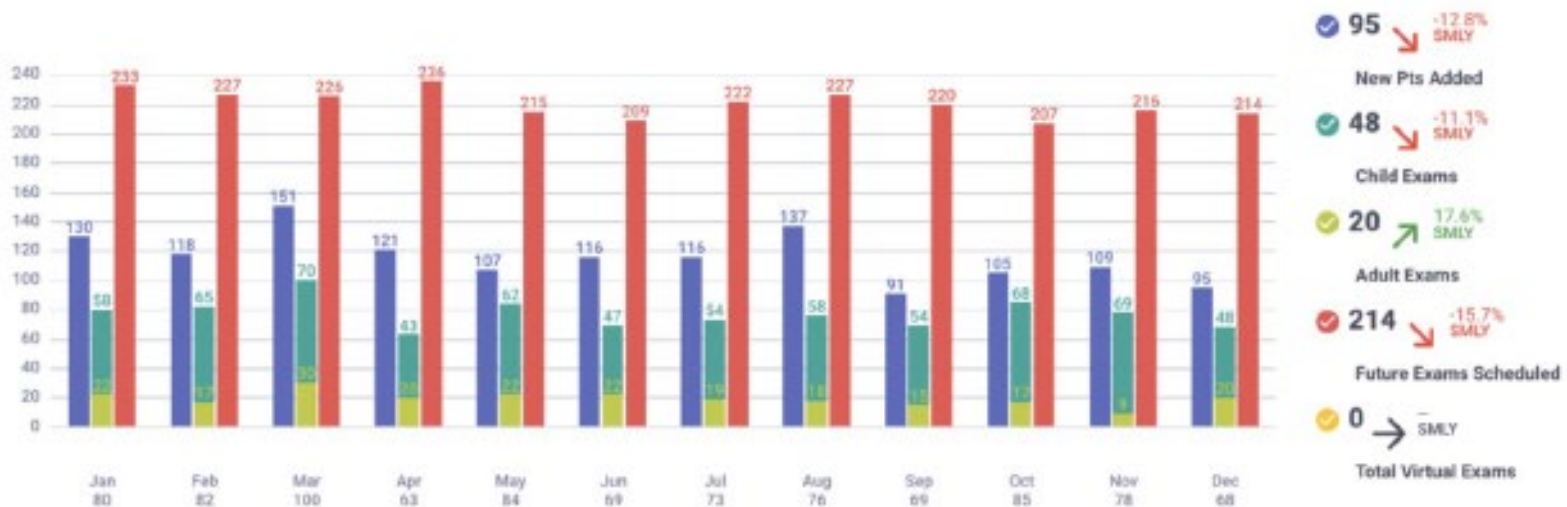
Why It's Important

New patient flow is key, but tracking NP Adds to Exams reveals where your practice may be falling short—whether in intake, marketing, or scheduling. Understanding this metric helps improve conversion from calls to exams, driving practice growth.

How to Use the Data

- **Balance Exam Availability** – If Future Exams Scheduled outpaces NP Adds, consider adding exam slots or hiring another treatment coordinator. Virtual exams can help capture patients who prefer convenience.
- **Reduce No-Shows & Cancellations** – Compare NP Adds to Completed Exams to find drop-off points. If certain age groups or referral sources have high no-show rates, adjust marketing and offer virtual exams.
- **Refine Intake & First Impressions** – If patients aren't following through with scheduled exams, assess intake protocols. Ensure the front desk team optimizes greetings, scheduling, and follow-ups.
- **Assess Marketing Impact** – If call volume is low or exam conversion lags, reassess marketing strategies. If adult patient numbers are rising, align your office environment and services to meet their expectations.

Exams and New Patients Added



Exams

Trend: Referrals surged—especially doctor referrals

- Total referrals: 848 (2024) → 1,062 (2025) (+25.2% YoY), +43.7% vs 2020
- Doctor referrals: 487 → 638 (+31.0% YoY) and increase as a share of referrals

	2020	2021	2022	2023	2024	2025
Doctor Referrals	409	544	500	503	487	638
Patient Referrals	129	150	141	131	140	156
Other Referrals	200	240	217	223	221	269

Aligner Starts

Trend: The mix is shifting away from aligners and back toward braces/appliances

- Aligner starts: 126 (2024) → 114 (2025) (-9.5% YoY), -10.9% vs 2020
- Braces/appliance starts: 461 → 489 (+6.1% YoY), +20.1% vs 2020
- Share shift: braces/appliances 71% → 74% (+3.0 pp YoY), aligners 26% → 23% (-3.0 pp YoY)

	2020	2021	2022	2023	2024	2025
Aligner Starts	128	169	148	134	126	114
Braces/Appliance Starts	407	503	482	480	461	489

Case Acceptance

What Is It

Case acceptance measures the percentage of exams that result in treatment starts.

Case Acceptance Formula

Treatment Starts (less Phase 2) / Number of Exams Seen

*Phase 2 starts are excluded from case acceptance calculation since they don't represent initial treatment initiation. Those patients would have been considered in the Case Acceptance calculation when Phase 1 treatment was initiated.

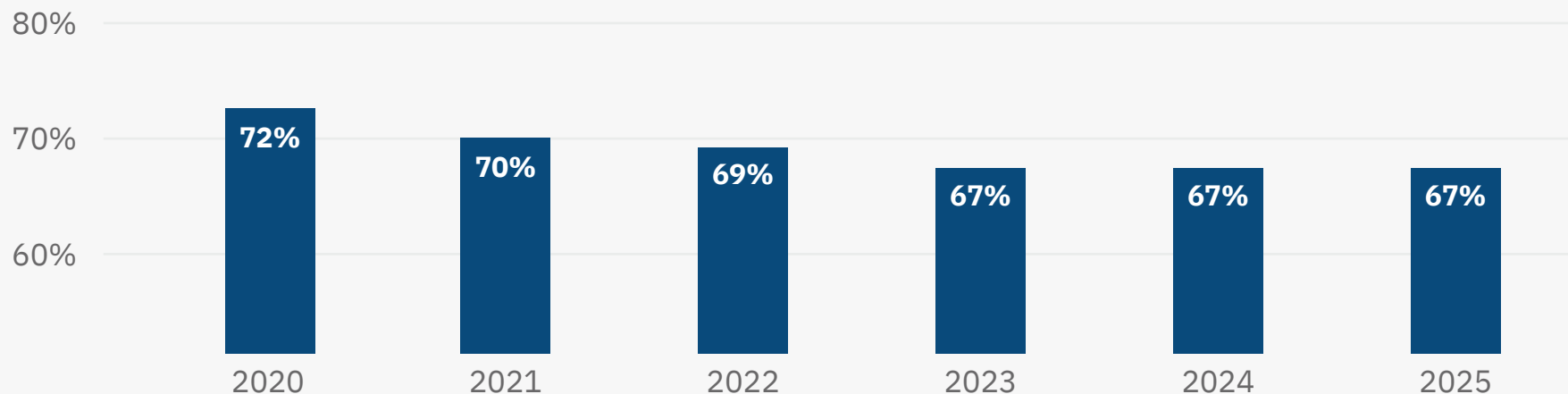


Trend: Case acceptance has softened since 2020 and hasn't rebounded

- Overall case acceptance: 72% (2020) → 67% (2025) (-5.0 pp), flat from 2024 to 2025.
- Private pay case acceptance improves slightly in the latest year (2024→2025), but Medicaid case acceptance declines over time.

Trend Takeaway: Consumers look more price-sensitive/selective than earlier years; financing, treatment tiering, and value communication matter more.

Case Acceptance YOY



Why It's Important

Case acceptance is a critical growth metric and one of the most important KPIs. It directly impacts treatment starts, contracts, and revenue. Not all patients accept treatment, but tracking performance against industry benchmarks helps practices improve acceptance rates.

For example, if only 60% of consults start treatment, comparing to industry benchmarks can reveal if your practice is underperforming.

How to Use the Data



Optimize Consult Efficiency – If case acceptance is low, check for delays in paperwork or insurance verification. Use [Gaidge Consult Manager](#) to track reminders, insurance verification, and form submissions.



Fix Scheduling Bottlenecks – High no-shows or cancellations? Streamline scheduling and reduce wait times to improve follow-through.



Strengthen Patient Education – If patients hesitate to start treatment, ensure they fully understand their plan. Use visuals, brochures, and videos to improve decision-making.



Refine Treatment & Payment Options – If cost concerns affect case acceptance, compare pricing to industry benchmarks and offer flexible plans.



Improve First Impressions – Low new patient conversion? Assess intake interactions. Greet patients by name, display a welcome board, and create a welcoming lobby experience.

Schedule

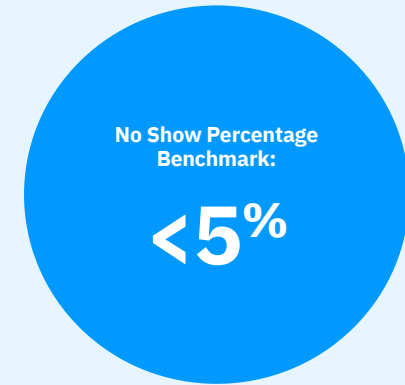
No Shows

What Is It

This metric tracks the percentage of scheduled appointments that patients fail to attend.

Formulas

No Show Percentage = Total No Shows ÷ Total Appts Scheduled



Trend: No-show rate is sticky; virtual volume remains far below 2020

- No-show % holds at ~5.0% year after year (including 2025).
- Virtual appointments completed: 65 (2020) → 23 (2025) (-64.6%), with a small 2024→2025 uptick.

Trend Takeaway: Tele-orthodontic behaviors normalized downward post-2020; meanwhile, reducing no-shows remains a persistent lever.

No-Shows: Why It's Important

High no-show rates disrupt scheduling, prolong treatment, and waste resources. Rescheduling missed appointments leads to longer wait times and inefficiencies.

No-shows also cost money: A 7% no-show rate at \$250 per visit means losing \$17.50 per appointment. With industry benchmarks at 5% or lower, tracking this data helps identify inefficiencies. Adjusting scheduling, improving messaging, and refining staff training can reduce no-shows and increase profitability.

How to Use Data

- **Use No-Show Data to Improve Reminders** – If missed appointments are high, strengthen your reminder system with a structured cadence of texts and emails.
- **Leverage Call Data to Increase Attendance** – If exam conversions are low, have your Treatment Coordinator call ahead to walk them through the visit and answer questions. A quick call can make patients more likely to show up.



Treatment Efficiency

Patients Over ECD

What Is It

Patients Over ECD is the percentage of patients still in active treatment beyond their Estimated Completion Date (ECD).

Formula

Patients over ECD ÷ Total Patients in Active Treatment



Trend: Fewer patients are running past their Estimated Completion Date

One of the clearest operational improvements over the last six years is the steady decline in patients who are Over Estimated Completion Date. In 2020, the dataset shows 351 active patients Over ECD, representing 28% of active patients. By 2025, that drops to 319 patients and 25%—a reduction of 32 patients (-9%) and 3 percentage points over the period. Notably, 2025 is the lowest point in the six-year trend, with the largest year-over-year improvement coming from 2024 to 2025 (down 20 patients and 2 points).

This downward trend suggests practices are getting better at keeping cases moving to finish—whether through tighter progress tracking, improved appointment cadence, clearer compliance expectations, or stronger mid-course intervention when cases drift. That said, the benchmark noted in the metric (targeting <10% ±2%) indicates there's still meaningful room for improvement: even with progress, a quarter of active patients running past ECD can impact chair time, scheduling efficiency, and patient satisfaction. For 2026, continued focus on finishing protocols, proactive “at-risk” case identification, and frictionless patient follow-through should remain a high-return lever for both capacity and profitability.

	2020	2021	2022	2023	2024	2025
% of Patients Over ECD	28%	28%	26%	27%	27%	25%

Why It's Important

Treatment efficiency matters for both patients and practices. Finishing on time improves patient experience, while delays increase costs and strain resources. Think of chair time like production equipment—when treatment runs long, it disrupts scheduling and slows overall efficiency.

How to Use Data

- **Spot Compliance Issues Early** – If too many patients exceed their ECD, look for patterns. Are certain cases consistently delayed? Reinforce education on appliance care and expectations using videos and clinical handouts.
- **Track Progress & Adjust as Needed** – If delays keep happening, review your treatment protocols. Regular check-ins and small adjustments can prevent cases from dragging on.
- **Keep Patients Engaged** – Clear instructions and consistent follow-ups help patients stay on schedule. When they understand their progress, they're more likely to stick to the plan.

Gaidge Tracks the Most Important Growth Metrics for Your Practice

Analyzing critical data—an already complicated feat—is doubly difficult with clunky downloads, spreadsheets, and manual entry. Without proper systems in place, monitoring the financial health of your practice can be time-consuming, expensive, and potentially inaccurate.

At Gaidge, we encourage practices to explore and implement the best methods to ensure the most detailed analysis of their financial health and overall performance. With [Gaidge's cloud-based data analytics platform](#), your practice can track more than 80 metrics for real-time clarity and strategic business planning. Its vast industry dataset allows access to precise benchmarking comparisons for accurate measurements, creating a better environment for patients while improving your own peace of mind.

“Gaidge helps you to see, pretty simply, your clinical efficiency. Gaidge will show you in real time how you’re doing with treatment timelines and treatment estimates so that you are giving patients the right information up front. You can also look at your repair rate quickly and communicate that to the team with the easy-to-look-at graphics. It gets our whole clinical team on the same page.” — **Kristen H. Fritz, DDS, MS**



You need to know the score to thrive in today’s competitive environment. But how will you know if you’re winning if you don’t know the score? [With Gaidge](#), you’ll always know where your practice stands, giving you the confidence to make informed business decisions and the time to focus on what matters most: your patients.