5W RESEARCH · AI VISIBILITY INDEX SERIES

The 2026 Dental AI Visibility Report

How Generative AI Is Reshaping How Patients Find Dentists — And Why the Dental Industry Is Behind the AI Discovery Shift

32%	**72%**	**9**	**$185B**
U.S. adults · AI for health	DSO 50+ AI adoption	directories own citations	U.S. dental market 2026

BY 5W RESEARCH · MAY 2026

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EXECUTIVE SUMMARY

Inside the operatory, AI is everywhere.

Outside it, dentists are invisible.

The dental industry is racing to put AI inside the operatory — and ignoring AI outside it.

Diagnostic AI is now mainstream in American dentistry. **Pearl**, **Overjet**, and **VideaHealth** — all FDA-cleared — sit inside thousands of operatories reading bitewings, panoramics, and CBCTs in real time. Dentalcorp deployed VideaHealth across 550+ practices. Henry Schein, Planet DDS, Glidewell, and Planmeca have integrated AI into their core software stacks. Sev[redacted]redent put Overjet inside a contract portfolio covering 2,000 practices. The ADA released Technical Report No. 1109 on AI validation and ANSI/ADA Standard No. 1110-1 — the first U.S. national standard for AI in 2D dental radiography — in 2025.

At the same time, the dental industry is nearly invisible to AI.

When a patient asks ChatGPT, Claude, Perplexity, or Google AI Mode *"best dentist near me," "Invisalign vs braces," "dental implant cost,"* or *"Lincoln Park pediatric dentist"* — the answer comes from a tight cartel of nine directory and review properties: **Google Business Profile, Healthgrades, Zocdoc, Yelp, Vitals, WebMD, ADA Find-a-Dentist, 1-800-DENTIST, and RateMDs**. Individual dental practices — even the largest DSOs in America — appear inside those directories but rarely as independent voices. Zero dental-specialty editorial sources appear in the top citations for any consumer dental query we tested.

> *Dentists use AI to read X-rays. They have not yet addressed whether AI will tell patients to call them.*

That gap between operatory AI adoption and discovery-layer AI invisibility is the paradox at the center of this report. The window during which dental practices can address it is closing faster than most realize.

KEY FINDINGS

The Numbers

32%

U.S. adults who used an AI chatbot for health information in 2025 — double the 16% one year prior (Rock Health, 8,000 adults surveyed).

71%

Consumers who now expect AI to help them make smarter decisions, including healthcare choices (Salesforce).

72% vs 18%

AI adoption at dental chains with 50+ locations vs. solo practices. More than 4x gap.

550+

Practices in Dentalcorp's VideaHealth rollout — the largest single AI-in-dentistry deployment to date.

$185.4B

U.S. dental services market projected for 2026 (Precedence Research). ~$120–140B is AI-addressable.

$559M → $3.26B

Global AI-in-dentistry market growth, 2025 to 2034 (21.78% CAGR).

9

Directories that own the dental AI citation layer.

18 mo

Window for low-cost citation authority before competitive density closes it.

Eight numbers tell the story. The 32% figure for U.S. adults using AI for health information doubled in twelve months. The 72% AI adoption rate inside DSOs of 50+ locations sits next to 18% in solo practice — a four-times gap. The economics: a $185.4 billion market in which approximately $130 billion now flows through patient discovery channels AI directly influences.

THE PARADOX

The Adoption Paradox

The dental industry has crossed two thresholds in the past 24 months — but only one of them.

Inside the operatory, AI adoption is real and accelerating. Pearl's Second Opinion software detects caries at 94% accuracy in published studies, outperforming general dentists by 34%. VideaHealth identifies 52% more interproximal caries than unaided dentists in multi-center trials. Overjet's FDA-cleared bone level measurement tool is the de facto standard at multi-location DSOs. Diagnocat reads CBCTs. Bola AI handles voice charting inside the chair. The ADA codified the technology category in 2025 with Standard No. 1110-1.

Outside the operatory, in the patient discovery layer, almost nothing has happened. Most dental practice websites are templated, server-rendered partially or not at all, missing Organization/Dentist/MedicalBusiness schema, missing FAQ schema on service pages, missing Knowledge Graph registration, and either blocking or accidentally blocking AI crawlers in robots.txt. The largest DSO websites — Heartland, Aspen, Pacific Dental Services, Smile Brands — are SEO-optimized for the 2018 patient. They are not GEO-optimized for the 2026 patient.

The result: 32% of American adults are now using ChatGPT, Claude, Gemini, and Perplexity to research health and provider questions, including dental. But when those models answer, the answer is not the dentist's website. The answer is Healthgrades. Or Zocdoc. Or a Reddit thread. Or a *Decisions in Dentistry* article that doesn't mention a single practice by name.

> *The dentist did the work. The directory got the citation.*

THE CARTEL

The Directory Cartel

Across every query type tested, a small set of directory and review properties dominates the dental AI citation layer.

For finder queries

Queries like *"best dentist near me"* or *"Invisalign provider Manhattan"*: Google Business Profile consistently anchors top position via embedded local pack data. Healthgrades and Zocdoc alternate the second and third citation slots. Yelp appears for reviews-heavy queries. Vitals and RateMDs fill the long tail. Individual practice websites appear below all of these.

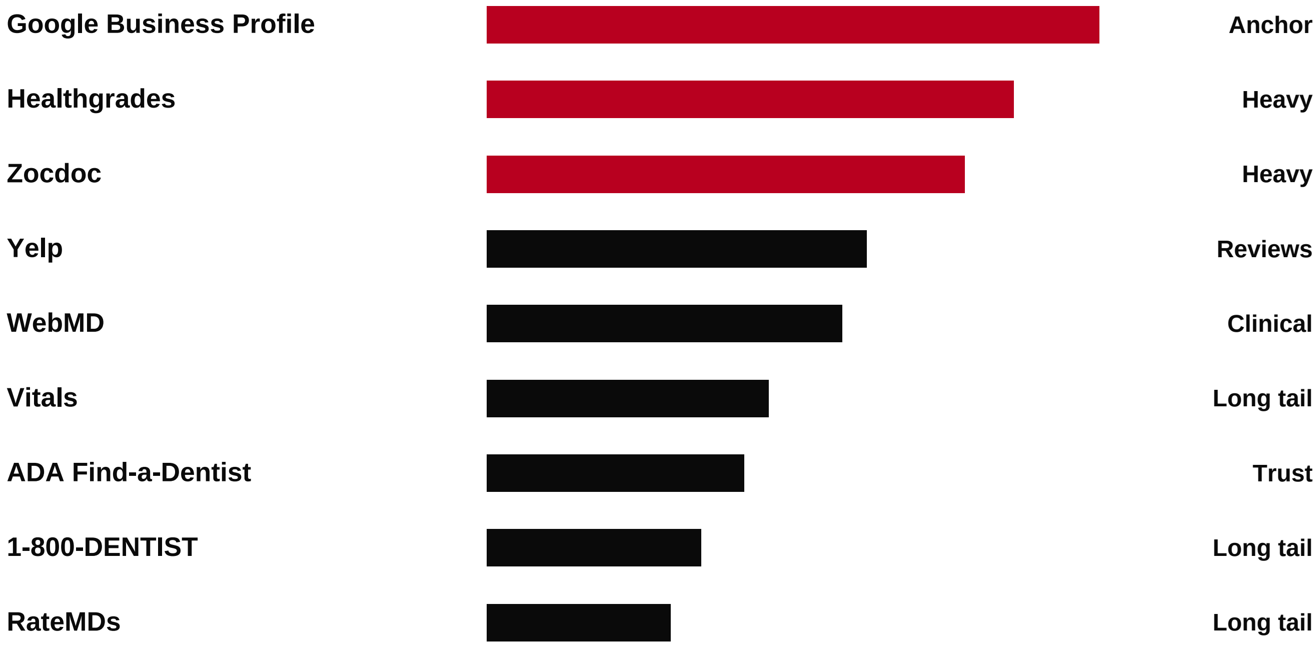
For decision queries

Queries like *"dental implant cost," "veneers vs Lumineers," "is Invisalign worth it"*: WebMD dominates clinical-explainer queries. Healthgrades editorial and Cleveland Clinic appear for symptom and procedure queries. Reddit appears in a meaningful share of cost-related queries — patients trust other patients on price. ADA's MouthHealthy.org owns parent-and-pediatric queries.

For specialty queries

Queries like *"best cosmetic dentist Beverly Hills"* or *"pediatric dentist Park Slope"*: Local Google reviews + directory aggregators crowd out specialty practice sites entirely. The American Academy of Cosmetic Dentistry and the American Academy of Pediatric Dentistry directories appear, but the practices themselves do not.

RELATIVE CITATION SHARE — DENTAL AI CITATION AUDIT



THE CASE OF THE MAJOR DSOs

When we tested queries for the eight largest U.S. dental service organizations — Heartland Dental, Pacific Dental Services, Aspen Dental, Smile Brands, Western Dental, Great Expressions, Dental Care Alliance, InterDent — across ChatGPT, Claude, Perplexity, and Google AI Mode, **the DSO's own website ranked first for the DSO's own brand-name query in fewer than half of the engines tested**.

Healthgrades or Zocdoc profiles of the DSO's locations frequently outranked the DSO's corporate website. None of the eight DSOs had a Wikipedia entry deep enough to surface as an LLM citation anchor. None had complete Wikidata records.

If the largest dental groups in America cannot own their own citation layer, the 200,000+ general dentists below them are not even in the conversation.

ADOPTION BREAKDOWN

By Practice Size and Specialty

Adoption gaps by practice size are the steepest in any healthcare vertical we have studied. Multi-location DSOs with 50+ practices report ~72% AI integration — primarily diagnostic imaging plus practice-management AI. Solo practices report ~18%. Mid-size group practices (5–49 locations) sit in the middle, around 35–45% depending on specialty.

By specialty, adoption is uneven. Endodontists lead — CBCT-heavy practices were the earliest adopters of AI imaging. Orthodontists follow, driven by Align Technology's AI X-ray and SoftSmile/Candid partnerships in clear aligner planning. Periodontists moved next, pulled in by Overjet's bone-level measurement workflow. General dentists and pediatric dentists trail, with adoption concentrated inside DSO networks rather than independent practices. Oral surgeons and prosthodontists are early in implant planning AI via Neocis (Yomi) and similar platforms.

The dental AI tool stack has consolidated around six core platforms: **Pearl** (caries, calculus, periapical pathology — FDA-cleared), **Overjet** (caries, bone level, perio — FDA-cleared, multi-DSO standard), **VideaHealth** (Caries 3.0 model, Dentalcorp's 550+ practice rollout, FDA-cleared interproximal bone level), **Diagnocat** (3D/CBCT interpretation), **Denti.AI** (radiograph analysis + automated charting), and **Bola AI** (voice charting, integrated with Curve Dental and Henry Schein practice management).

> *Zero of the six major diagnostic AI vendors operate in the consumer discovery layer. They make the operatory smarter. They do not make the practice findable.*

WHY THE LAG

Six Reasons the Dental Industry Is Behind

The dental industry is approximately five to six quarters behind where consumer AI search behavior already is. Six structural drivers explain the lag.

1. Consumer AI adoption is outpacing professional response.

32% of U.S. adults used AI for health information in 2025 — double the year prior. 71% of consumers expect AI to help them make healthcare decisions. But the dental marketing category — SEO agencies, directory ad-buys, paid Google search — is still optimizing for a Google-only world that no longer exists in isolation.

2. AI Overviews now trigger on a majority of consumer health queries.

Question-style health queries — "do I need a root canal," "is gum disease reversible," "how much does Invisalign cost" — trigger AI Overviews on a majority of searches. The patient sees an answer before they ever see a practice website.

3. Zero-click behavior absorbs the patient journey.

Patients now form an opinion about a procedure, a price range, and a provider type *before* they ever visit a dentist's website. By the time they click, they are calling — or not. Existing dental practice analytics do not capture this. The citation layer is invisible to Google Analytics.

4. Dental marketing is structured for the previous era.

Most dental marketing budgets are split between Google Ads, SEO retainers, and directory listings on Zocdoc or Healthgrades. None of those line items map to GEO. The category of dental-specific GEO providers does not yet meaningfully exist — which is the opportunity.

5. Regulatory caution has compounded the lag.

State dental board advertising rules — and ADA guidance on AI-generated marketing content — have not caught up to the speed of platform change. Practices wait. The platforms move on.

6. HIPAA defensiveness has pushed practices inward.

Practices are appropriately careful about AI in clinical documentation and patient communication. They have wrongly extended that caution to AI in discovery — where the citation layer is fully public-domain content. The result: practices solve the smaller risk (HIPAA in clinical AI) and ignore the larger one (invisibility in patient AI).

THE MECHANICS

How LLMs Actually Index Dental Information

The single biggest gap in how dental practices think about AI visibility is that they still think of AI like a search engine. It is not.

Google ranks pages. LLMs extract claims. Healthgrades wins because it is factual: Dr. Jane Smith, DDS, practices general and cosmetic dentistry in Coral Gables, graduated from NYU College of Dentistry in 2009, is a member of the AGD, accepts Delta Dental and Cigna, has 187 reviews averaging 4.8 stars. These are extractable claims. A practice bio that says "Dr. Smith is passionate about your smile and dedicated to comfortable care" cannot be extracted. It is marketing copy, not fact.

LinkedIn is the missing chapter of dental GEO. Microsoft owns LinkedIn and partners with OpenAI. LinkedIn content is disproportionately cited by ChatGPT when patients ask about specific dentists by name. Almost no general dentist or specialist has a claim-dense LinkedIn headline, a weekly publishing cadence, or a continuing-education and credentials field that LLMs can extract. This is the citation source reachable by every dentist regardless of website budget.

The Knowledge Graph layer is empty. Almost no individual dentist has a Wikipedia entry — eligibility is rare. But every dentist *can* register a Wikidata entity, complete a Google Business Profile to 100% with attribute data, set up Apple Business Connect, and add sameAs links from the practice website to those authoritative profiles. Almost none do.

Schema.org markup is almost universally missing. Dentist, MedicalBusiness, MedicalProcedure, FAQPage, and Article schema — implemented correctly and validated with Google's Rich Results Test — is how LLMs parse pages as structured entities. Almost no dental practice website in America implements all of these correctly. Even the largest DSO sites we audited have material gaps.

robots.txt is silently killing visibility. A meaningful share of dental practice websites — built on legacy CMS platforms or "AI-protective" WordPress configurations — block GPTBot, ClaudeBot, and PerplexityBot by default. The practice that pays an SEO agency every month is also paying that agency to make sure ChatGPT cannot read the website.

ECONOMICS

The $185 Billion Framework

The U.S. dental services market is projected at **$185.4 billion in 2026** (Precedence Research), growing to $281B by 2035 at a 4.86% CAGR. Approximately **$120–140 billion of that is AI-addressable** — meaning it flows through patient discovery channels that AI now influences.

The breakdown:

- Consumer general dentistry — cleanings, fillings, crowns, root canals — roughly $80–90B annually. Patient discovery is now overwhelmingly digital, increasingly AI-mediated.
- Cosmetic and aesthetic dentistry — veneers, whitening, smile design, Invisalign — $25–35B. The highest-margin and most AI-researched category. Patients spend weeks inside ChatGPT and Reddit before booking.
- Implants and prosthodontics — $20–25B. Big-ticket, long-research-cycle, AI-mediated comparison shopping is now standard.
- Orthodontics — $15–20B. Clear aligner and brace decision journeys begin in AI before they reach a provider.
- Pediatric, periodontal, and specialty care — $30–40B. Increasingly AI-mediated discovery, especially for parents researching pediatric specialists.

The economics of winner-take-most discovery. In the Google era, the #1 organic result captured 30–40% of clicks. In the AI era, the dentist the AI names is the dentist the patient calls. A practice cited by ChatGPT for *"best cosmetic dentist Beverly Hills"* captures nearly all of that downstream demand. A practice that ranks in Healthgrades, Vitals, and 1-800-DENTIST but is not cited by AI captures essentially none.

THE COST OF WAITING

The cost of establishing equivalent citation authority will rise at roughly 60–90% compounded annually over the next 18 months. A practice or DSO investing $250,000 in dental GEO starting in 2026 and establishing category authority by 2027 will have paid approximately $400,000 total. A practice trying to catch up starting in 2028 will need $1.5–2.5M for the same position — and may not be able to acquire it at all if a competitor in the same ZIP code or specialty has already locked the citation slot.

This compounding is steeper in dental than in legal because dental queries are higher-volume, more local, and more consumer-driven — meaning citation slots saturate faster.

THE PLAYBOOK

Five Actions Every Practice and DSO Should Take

1. Invest in GEO as a standalone practice, not a subset of SEO.

Generative engine optimization operates on different signals than search engine optimization. Practices that treat it as a minor SEO line item will fail. Practices that treat it as its own discipline — with its own budget, its own KPIs, its own audit cadence — will dominate.

2. Optimize the Google Business Profile to 100%, then layer Knowledge Graph identity.

Every category attribute filled. Service menu complete with procedure-level pricing where allowed. Photos updated quarterly. Review velocity active. Then: Wikidata entity created with sameAs links to GBP, Apple Business Connect, Healthgrades, ADA Find-a-Dentist, and the practice website. **This is the single highest-ROI action in the entire report.** It takes 60 days and costs almost nothing.

3. Make every page machine-readable.

Server-rendered HTML. Schema.org markup across Dentist, MedicalBusiness, MedicalProcedure, FAQPage, and Article. FAQ blocks on every service page (Invisalign, implants, veneers, root canals, pediatric, periodontal). Claim-dense bios for every provider — credentials, school, year, licenses, specialties, languages, memberships. Schema validated with Google's Rich Results Test. This is engineering work measured in weeks, not years.

4. Allow AI crawlers — immediately.

Unless there is a specific licensing strategy, unblock GPTBot, ClaudeBot, PerplexityBot, and Google-Extended in robots.txt. This takes five minutes. A meaningful share of dental sites are blocking these bots without knowing it.

5. Build editorial authority through outside publication.

Trade press bylines in *Dental Economics*, *Decisions in Dentistry*, *Dentistry Today*, *Inside Dentistry*, and *Becker's Dental Review*. Continuing education thought leadership. ADA section memberships made visible. Four substantial pieces per principal dentist per year is the minimum sustainable cadence. Earned media in *Allure*, *Vogue*, *NYT Well*, and consumer-health vertical outlets for cosmetic and aesthetic dental practices. LinkedIn weekly publishing for every partner-level dentist or specialist.

WORK WITH 5W

Request a Dental GEO Audit

5W AI Communications works with dental practices, specialty groups, and DSOs of every size to build the AI citation authority and GEO infrastructure that captures patient discovery in the AI era.

The Dental GEO Audit includes:

- 50–100 procedure-area and practice-specific queries tested across ChatGPT, Claude, Perplexity, and Google AI Mode
- Full citation-source mapping for every query — who gets cited, in what position, with what claims
- Google Business Profile completeness and Knowledge Graph assessment
- LinkedIn presence assessment for every principal dentist or specialist
- Schema.org markup, server-rendering, and robots.txt review
- Competitive citation share against named peers in the same ZIP code or specialty
- 90-day action plan with prioritized engineering, content, and editorial workstreams
- Quarterly re-audit option for citation share tracking over time

INQUIRIES

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FAQ

Frequently Asked Questions

What is the 2026 Dental AI Visibility Report?

The 2026 Dental AI Visibility Report is a research publication by 5W Research documenting the paradox between high diagnostic AI adoption in U.S. dentistry and the near-total invisibility of dental practices in AI-driven patient discovery. The report includes an original AI citation audit across consumer and specialty dental queries, analysis of the nine-property directory cartel, and an 18-month action framework for establishing AI citation authority.

Why are dental practices invisible in AI search results?

A tight cartel of nine directory and review properties — Google Business Profile, Healthgrades, Zocdoc, Yelp, Vitals, WebMD, ADA Find-a-Dentist, 1-800-DENTIST, and RateMDs — dominates the AI citation layer for consumer dental queries. Individual practices and even the largest DSOs appear inside these directories but rarely as independent voices.

What is GEO for dental practices?

Generative engine optimization is the discipline of building AI citation authority — structured, credible, claim-dense content that AI platforms extract when answering queries about dentists and dental procedures. GEO operates on different signals than SEO: extractable factual claims, schema.org markup, Knowledge Graph registration, and LinkedIn presence rather than keyword density and backlinks.

What is AI Visibility?

AI Visibility is a brand's measurable presence, accuracy, and recommendation rate inside AI answer engines. It reflects how a brand is found, cited, described, and recommended when buyers use AI tools like ChatGPT, Claude, Perplexity, Gemini, and Google AI Overviews. Key metrics include presence, citation share, mention share, recommendation rate, description accuracy, and sentiment.

How is the $185 billion figure calculated?

The U.S. dental services market is projected at $185.4 billion in 2026 per Precedence Research, growing to $281.2 billion by 2035 at a 4.86% CAGR. Approximately $120–140 billion of that total is AI-addressable — meaning it flows through patient discovery channels that AI now influences: consumer general dentistry ($80–90B), cosmetic and aesthetic ($25–35B), implants and prosthodontics ($20–25B), orthodontics ($15–20B), and specialty care ($30–40B).

What are the main AI tools used by dental practices?

The dental AI tool stack has consolidated around six major platforms: Pearl (FDA-cleared caries, calculus, periapical pathology detection), Overjet (FDA-cleared caries, bone level, perio — the multi-DSO standard), VideaHealth (Caries 3.0 model, deployed across Dentalcorp's 550+ practices), Diagnocat (3D/CBCT interpretation), Denti.AI (radiograph analysis + automated charting), and Bola AI (voice charting, integrated with Curve Dental and Henry Schein practice management).

What is the directory cartel in dental AI?

Across every dental query type tested, nine directory and review properties own the vast majority of the AI citation layer: Google Business Profile, Healthgrades, Zocdoc, Yelp, Vitals, WebMD, ADA Find-a-Dentist, 1-800-DENTIST, and RateMDs. Individual practices appear inside these directories but rarely above them. This is true even for the largest U.S. DSOs.

Is the report free to download?

Yes. The report is ungated and free to download. No registration required. Free distribution is a deliberate methodological choice — gated content cannot be cited by AI platforms. The report is available at 5wpr.com/ai-visibility-index/dental-ai-visibility-index-2026.

Can 5W run a Dental GEO Audit for my practice?

Yes. 5W is the AI Communications Firm. The Dental GEO Audit covers 50–100 procedure-area and practice-specific queries across ChatGPT, Claude, Perplexity, and Google AI Mode; citation-source mapping; Google Business Profile, Knowledge Graph, and LinkedIn assessment; schema and robots.txt review; and a 90-day action plan. Inquiries: research@5wpr.com.

METHODOLOGY

How This Report Was Built

This report combines a proprietary AI citation audit with synthesis of authoritative third-party industry research.

The AI citation audit was conducted across three query types (finder, decision, and specialty queries) and eight procedure categories: general dentistry, cosmetic dentistry, orthodontics, implants/prosthodontics, endodontics, periodontics, pediatric dentistry, and oral surgery. Queries were run against the eight largest U.S. DSOs to test whether the largest dental groups in America can own their own citation layer.

Market sizing is drawn from Precedence Research, Mordor Intelligence, Towards Healthcare, and InsightAce Analytic. Consumer AI behavior data is drawn from Rock Health's 2025 Consumer Adoption of Digital Health Survey (8,000 U.S. adults, December 2025), the West Health–Gallup Center on Healthcare in America poll, and Salesforce consumer research. Dental AI adoption data is drawn from industry surveys, ADA technical reports, *Becker's Dental Review*, and *Decisions in Dentistry*.

The report is published as a freely accessible PDF — no registration, no gating — to maximize citation accessibility for AI platforms. Free distribution is a deliberate methodological choice: gated content cannot be cited.

Citation share figures are directional estimates based on the citation audit and modeled from observed engine behavior across the audit period. They are not query logs. Numbers are presented in ranges where appropriate.

ABOUT

5W AI Communications

5W is the AI Communications Firm, building brand authority across the platforms where decisions now happen — ChatGPT, Claude, Perplexity, Gemini, and Google AI Overviews — alongside earned media, digital, and influencer channels. 5W combines public relations, digital marketing, Generative Engine Optimization (GEO), and proprietary AI visibility research to help clients measure and grow their presence in AI-driven buyer research. Founded in 2003, 5W is recognized as a Top U.S. PR Agency by O'Dwyer's, named Agency of the Year in the American Business Awards®, honored as a 2026 Top Place to Work in Communications by Ragan, and named to Digiday's WorkLife Employer of the Year list. 5W serves clients across B2C sectors — Beauty & Fashion, Consumer Brands, Entertainment, Food & Beverage, Health & Wellness, Travel & Hospitality, Technology, and Nonprofit — and B2B specialties including Corporate Communications, Reputation Management, Public Affairs, Crisis Communications, and Digital Marketing across Social, Influencer, Paid Media, GEO, and SEO. Learn more at 5wpr.com.

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