



BESPOKE INTEL | CLEAR ALIGNERS CUSTOM SURVEY | SEPTEMBER 2019

CLEAR ALIGNERS SURVEY**Audience:** 1,200 US Consumers

EXECUTIVE SUMMARY: Consumers appear to care about their teeth aesthetic and oral care screened highly in the minds of consumers, but a relatively lower percentage say that they are actually dissatisfied with their teeth or are currently doing something about it. Telehealth seems to be in early innings across the space and, while most consumers who have had an experience with telehealth and teledentistry specifically were positive on it, consumers as of now favor in-person dental visits and it is unclear if that behavior will change over time. Broadly speaking, current and former customers of both SmileDirectClub and Invisalign offered positive feedback on their experience.

TEETH SATISFACTION

- Most consumers are actually satisfied with their teeth currently.
- Among those who are unhappy, the top complaints are related to color or chips/cracks.
- Respondents care about their teeth – just shy of 75% visit the dentist once or more per year.

TELEHEALTH AND TELEDENTISTRY OPPORTUNITY

- Telehealth usage is still in the early innings, but those who have used it like it.
- Respondents are considerably more likely to think dental visits should be done in person (they are more likely to think doctor appointments can be done via telehealth).

COMPETITIVE DYNAMICS

- Invisalign has a considerable lead on SmileDirectClub when it comes to unaided and aided awareness.
- Invisalign customers were more likely to learn about it via the orthodontist. SmileDirectClub users were more likely to learn about it via social media.
- Customers of each service express a high degree of satisfaction with their experience overall.
- SmileDirectClub users highly rated their experience with teledentistry when evaluated against a more traditional in-person dental visit.

DEMOGRAPHICS

- Respondents who use clear aligners from SmileDirectClub and/or Invisalign are more likely than the average consumer to be:
 - Black/African American, Hispanic/Latino, From the Northeast, Female, Single, Social Media Users (especially Snapchat, Instagram, and Twitter), Online Dating Users

AUDIENCE NOTES

“SDC Audience Sample Size” = 119 Current and Former Customers/Members

“Invisalign Audience Sample Size” = 100 Current and Former Customers

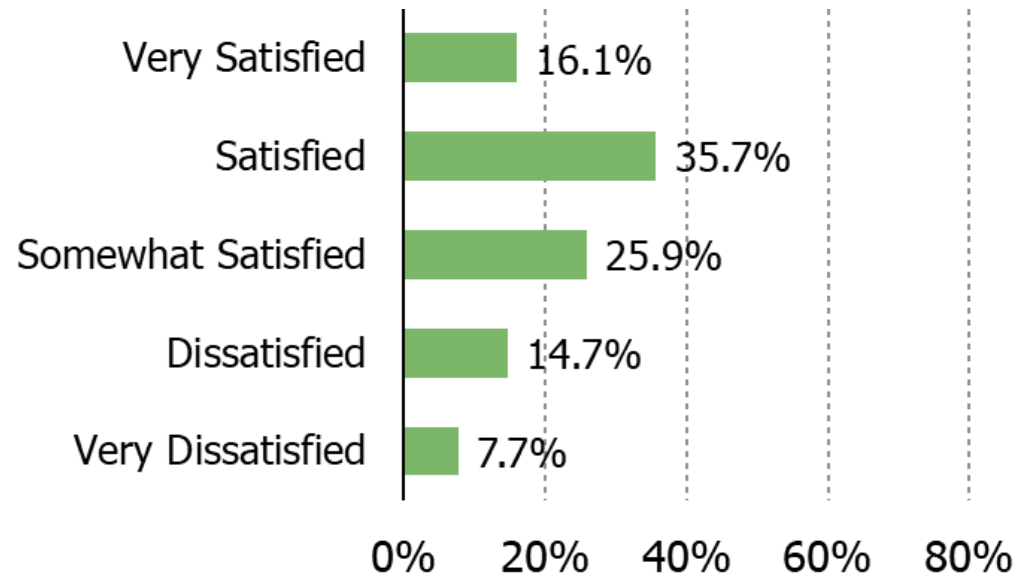
TAM | Stats Page

72.7%	Of respondents visit the dentist at least once per year.
12.8%	Of respondents have used telehealth services.
22.4%	Of respondents are dissatisfied with their teeth.
36.8%	Of those who are unhappy with their teeth say it is because they are not straight enough.
45.8%	Of respondents are okay with their teeth as they are.
35.5%	Of respondents would like to improve their teeth but are not currently doing anything for them.
14.3%	Of respondents are currently seeking ways to improve their teeth.
4.4%	Of respondents are currently undergoing treatment to improve their teeth.
11.1%	Of respondents have used a retainer.
15.6%	Of respondents have used braces.
59.0%	Of those looking to improve their teeth currently would find nighttime alignment to be appealing.

Clear Aligners Survey Results

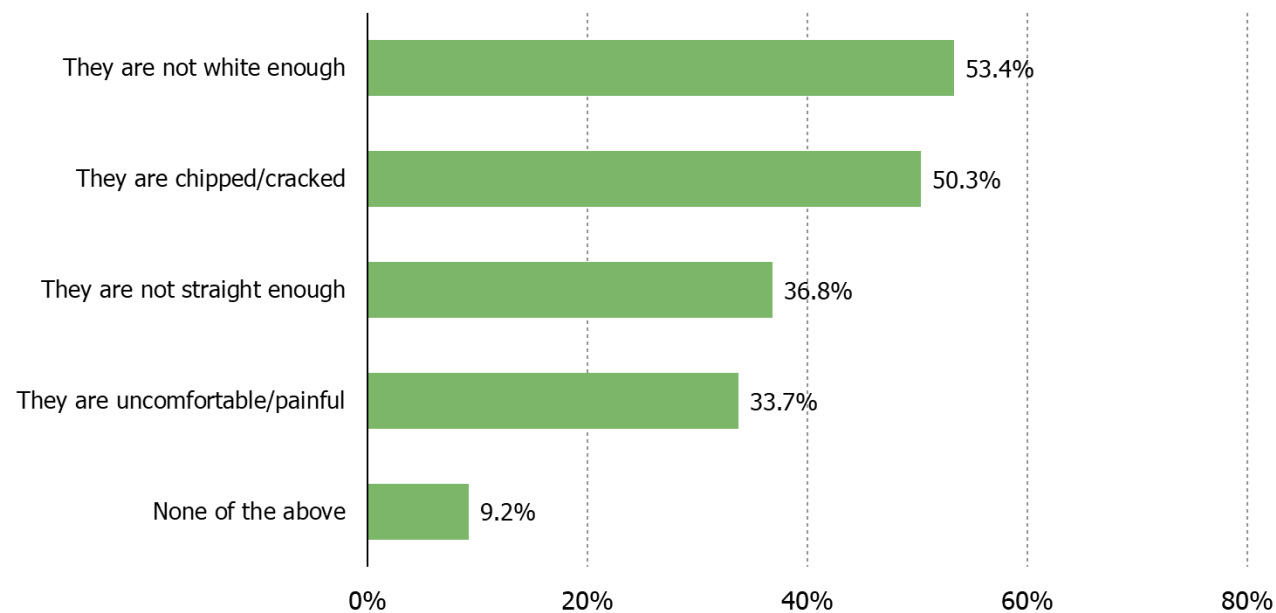
Please rate how satisfied you are with your teeth currently.

Posed to all respondents.



What about your teeth are you unhappy with? (Select ALL that apply)

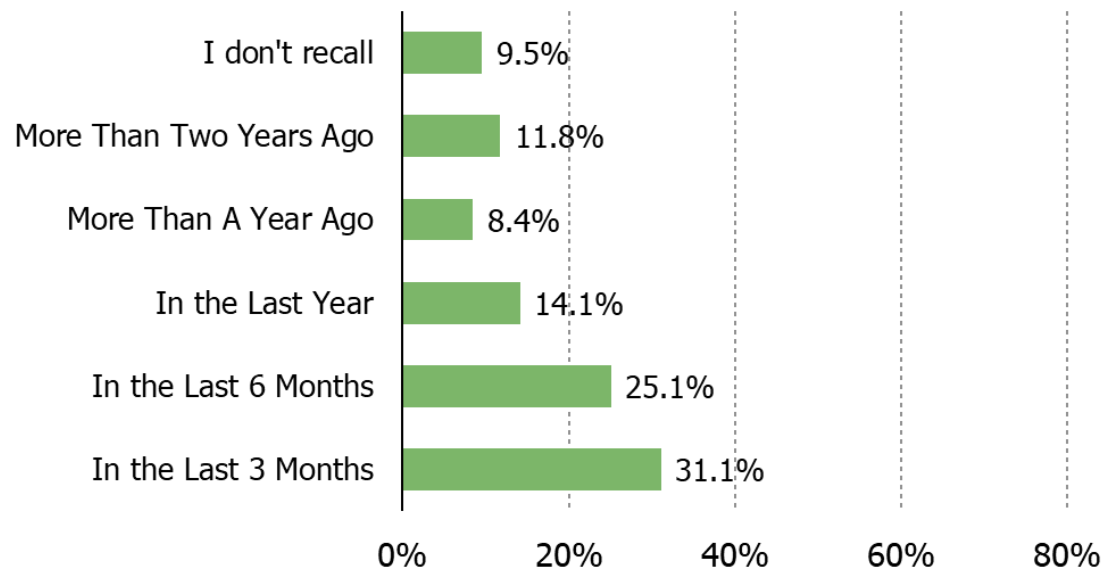
Posed to respondents who were either dissatisfied or very dissatisfied with their teeth.



Clear Aligners Survey Results

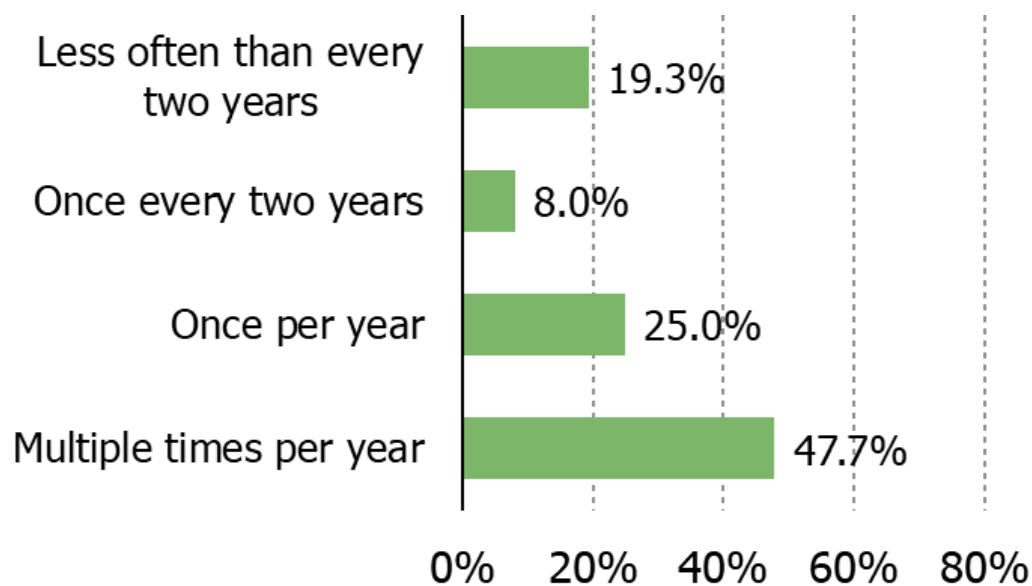
When was your last dental checkup (ie., standard consultation, teeth exam, X-rays, and cleaning, etc.)?

Posed to all respondents.



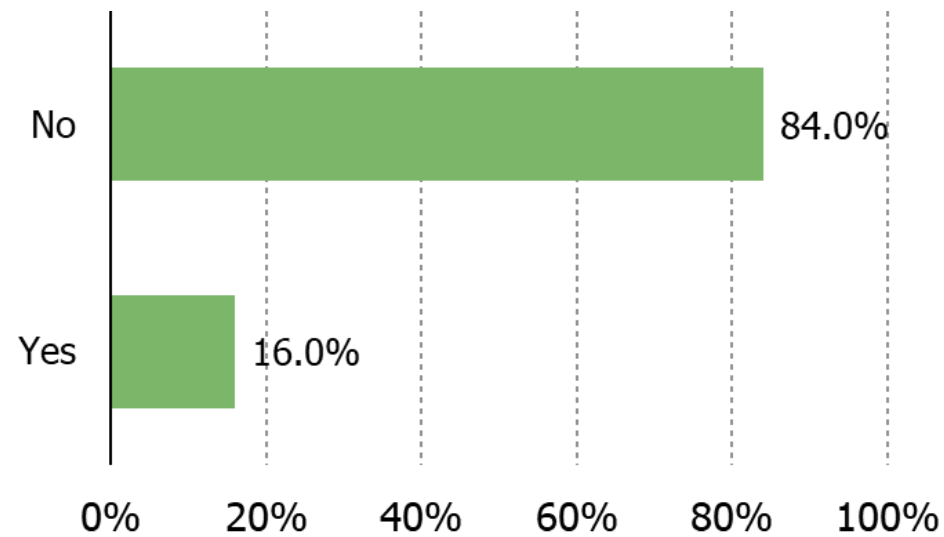
How often do you typically visit the dentist?

Posed to all respondents.



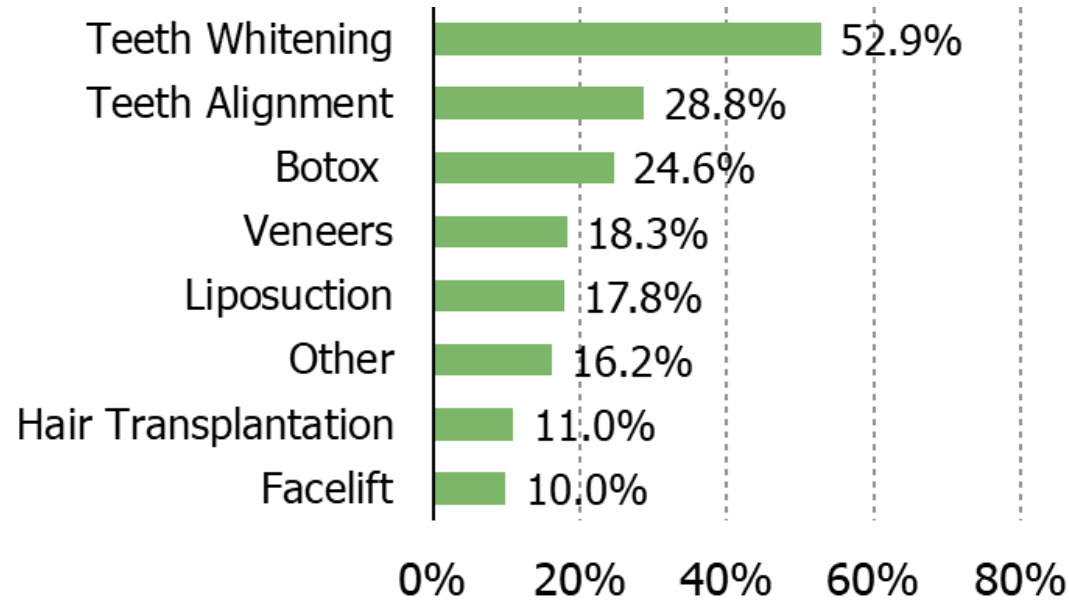
In the next 12 months, are you considering at least one cosmetic treatment?

Posed to all respondents.



Are you considering any of the following (select ALL that apply)?

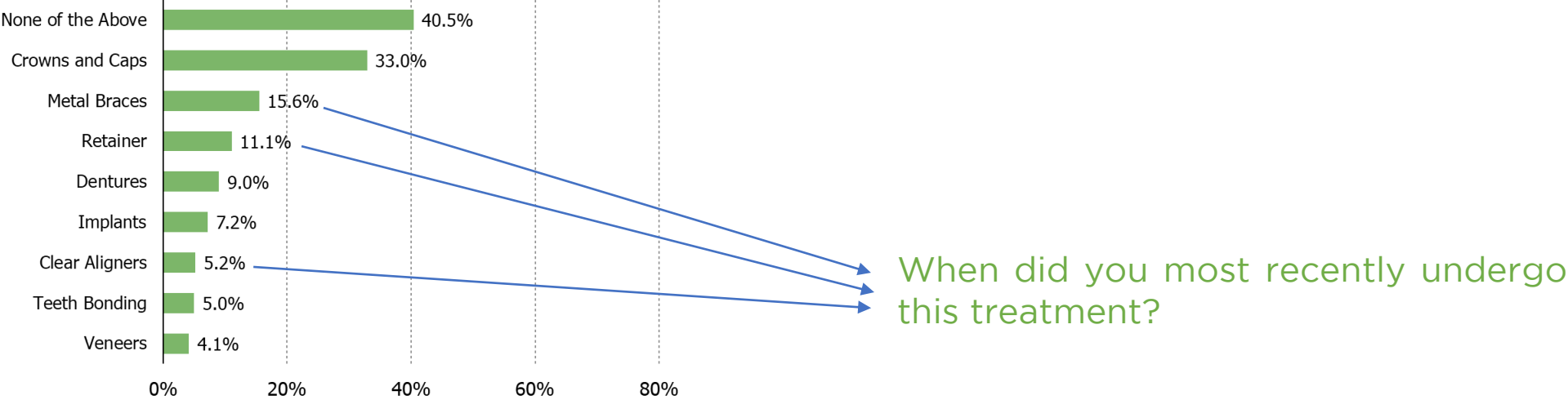
Posed to all respondents who are considering at least 1 cosmetic treatment in the next 12 months.



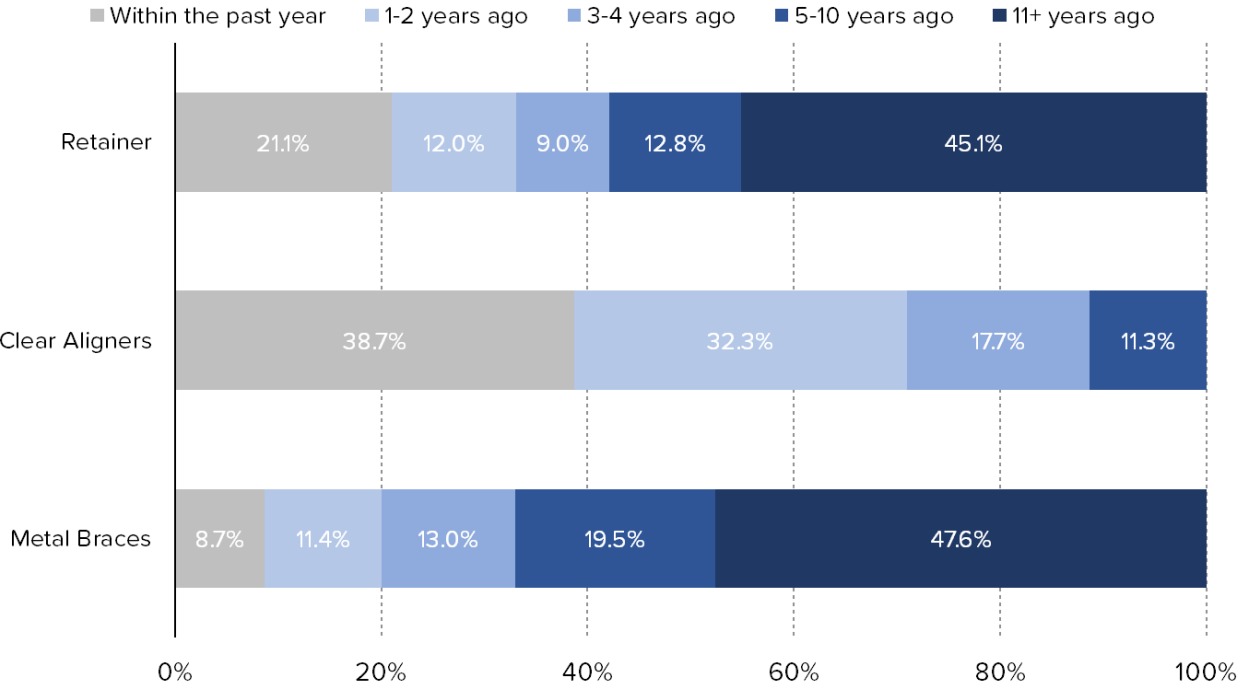
Clear Aligners Survey Results

Have you ever taken measures to improve your teeth? (Select ALL that apply)

Posed to all respondents.

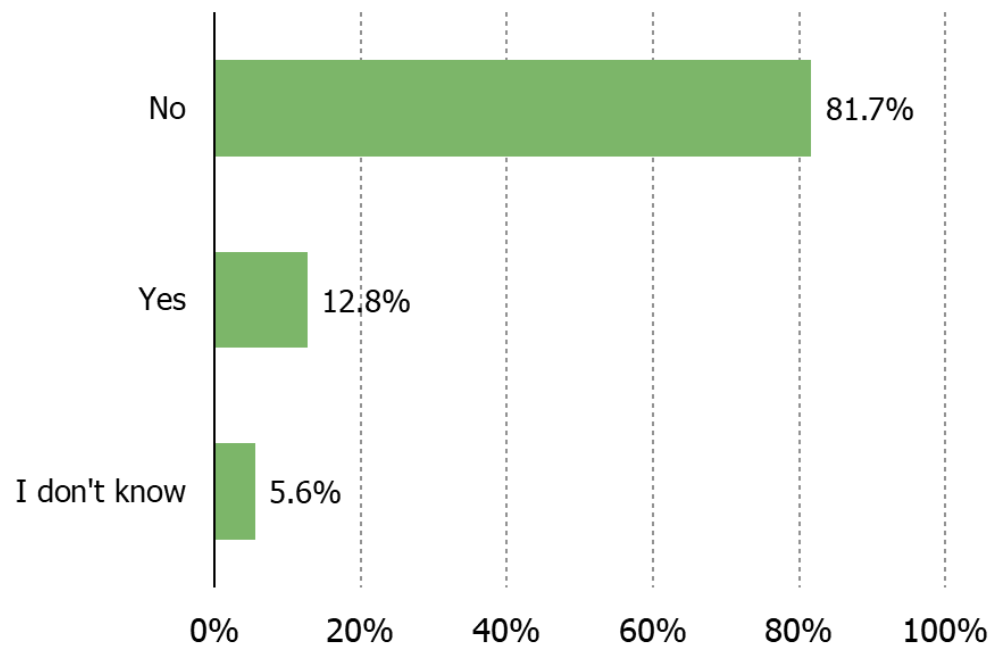


When did you most recently undergo this treatment?



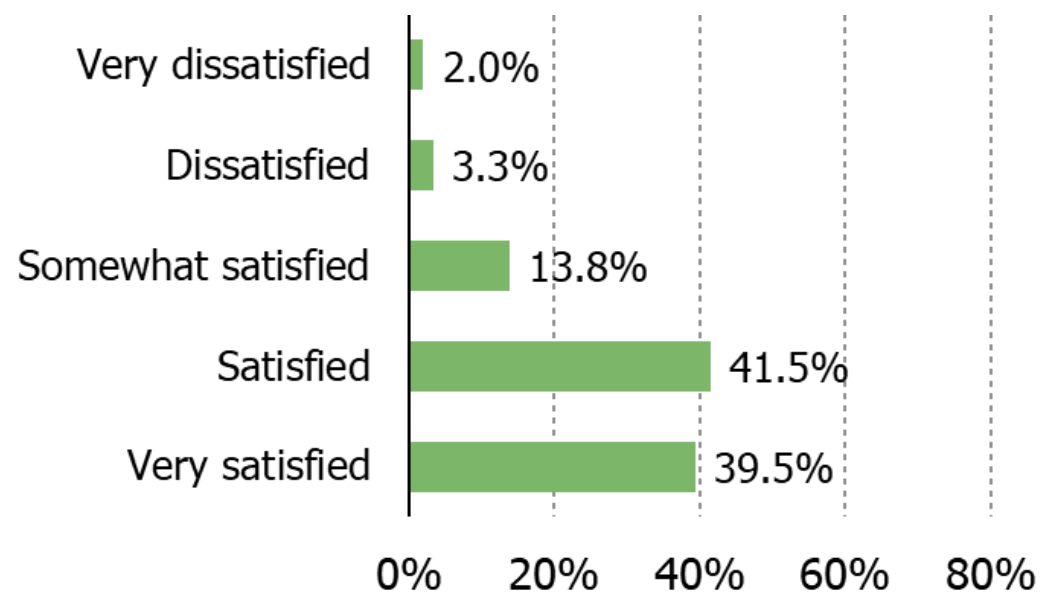
Have you ever used a telemedicine/telehealth service?

Posed to all respondents.



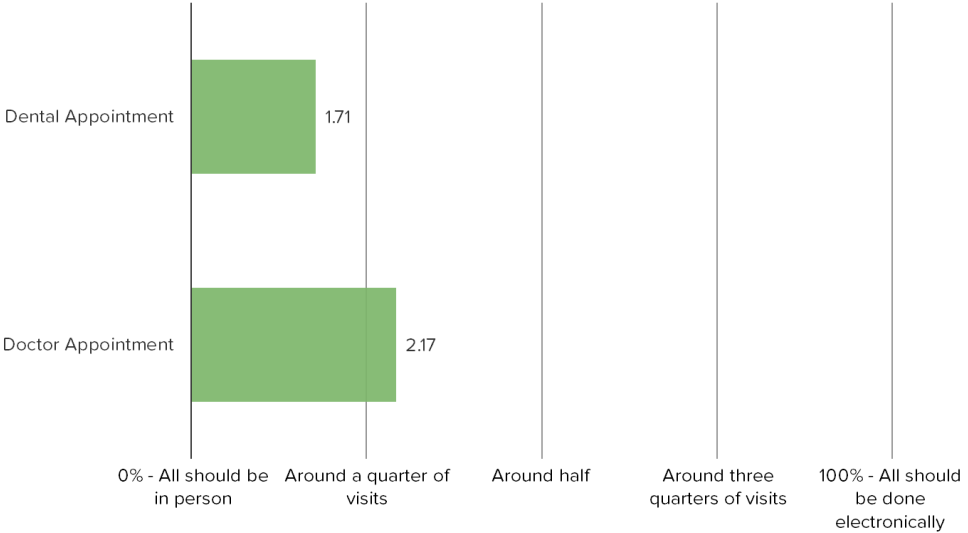
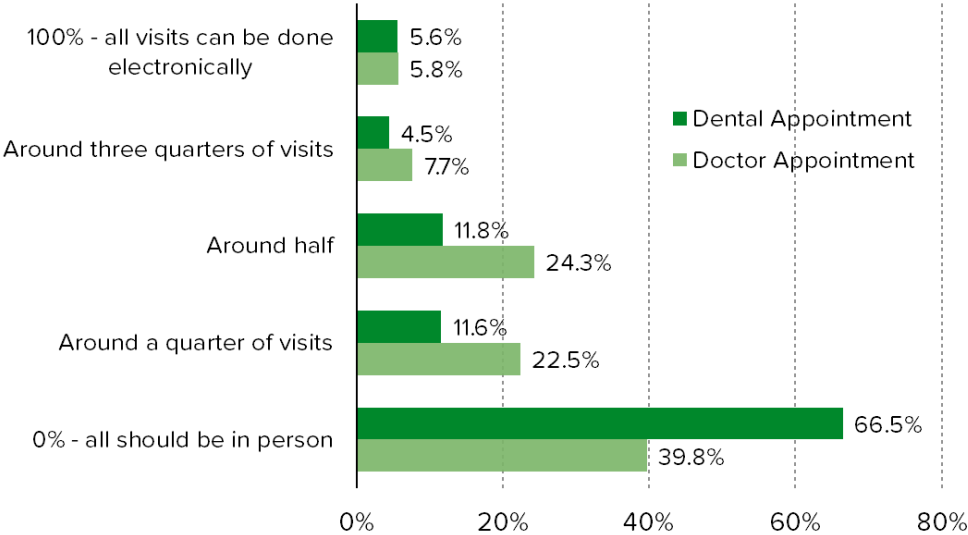
How satisfied were you with your prior telehealth experience?

Posed to all respondents who have previously used a telehealth service.



Clear Aligners Survey Results

What percentage of doctor/dental visits do you think could be done electronically via a mobile app or video conferencing as opposed to seeing them in person?
Posed to all respondents.

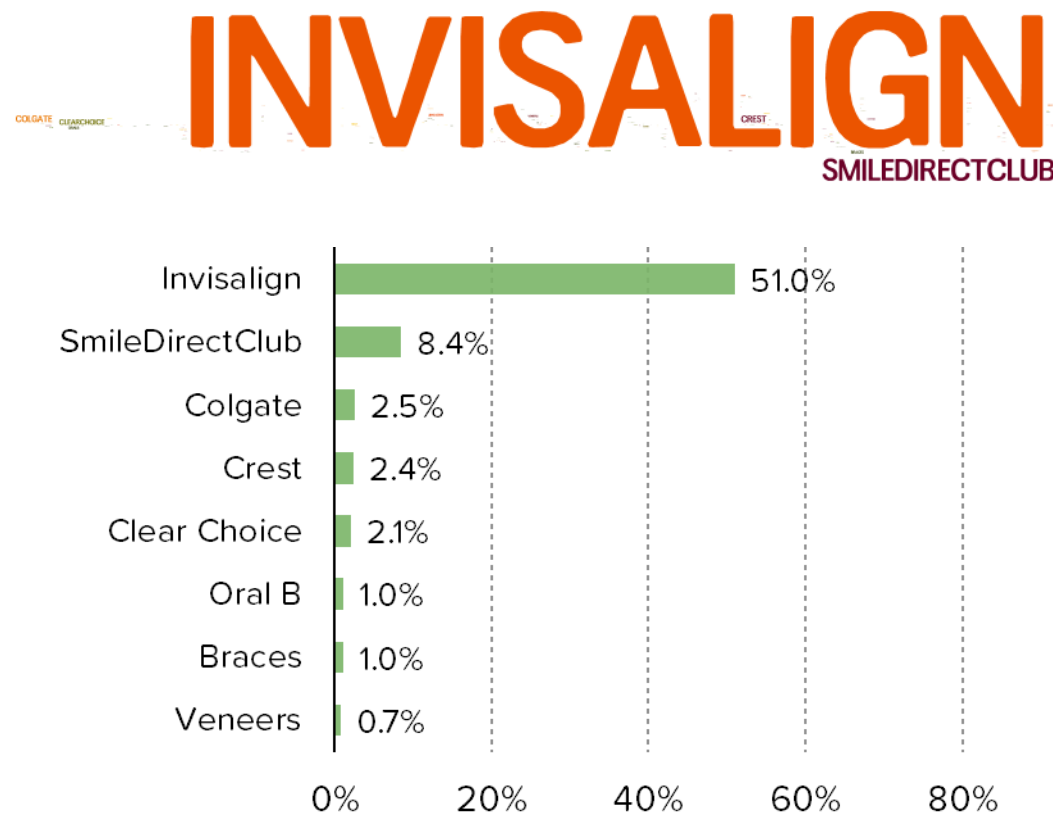


CLEAR ALIGNERS AWARENESS AND
MARKETSHARE

Clear Aligners Survey Results

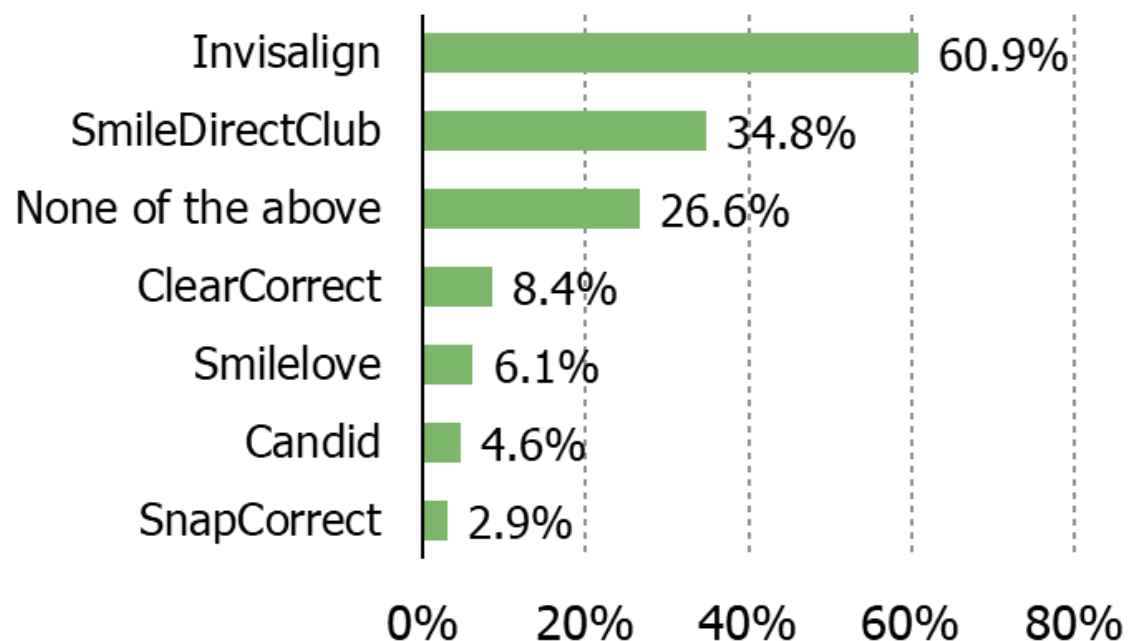
When you think of clear teeth aligners, which company comes to mind first?

Posed to all respondents (excluding responses of those who said they don't know).



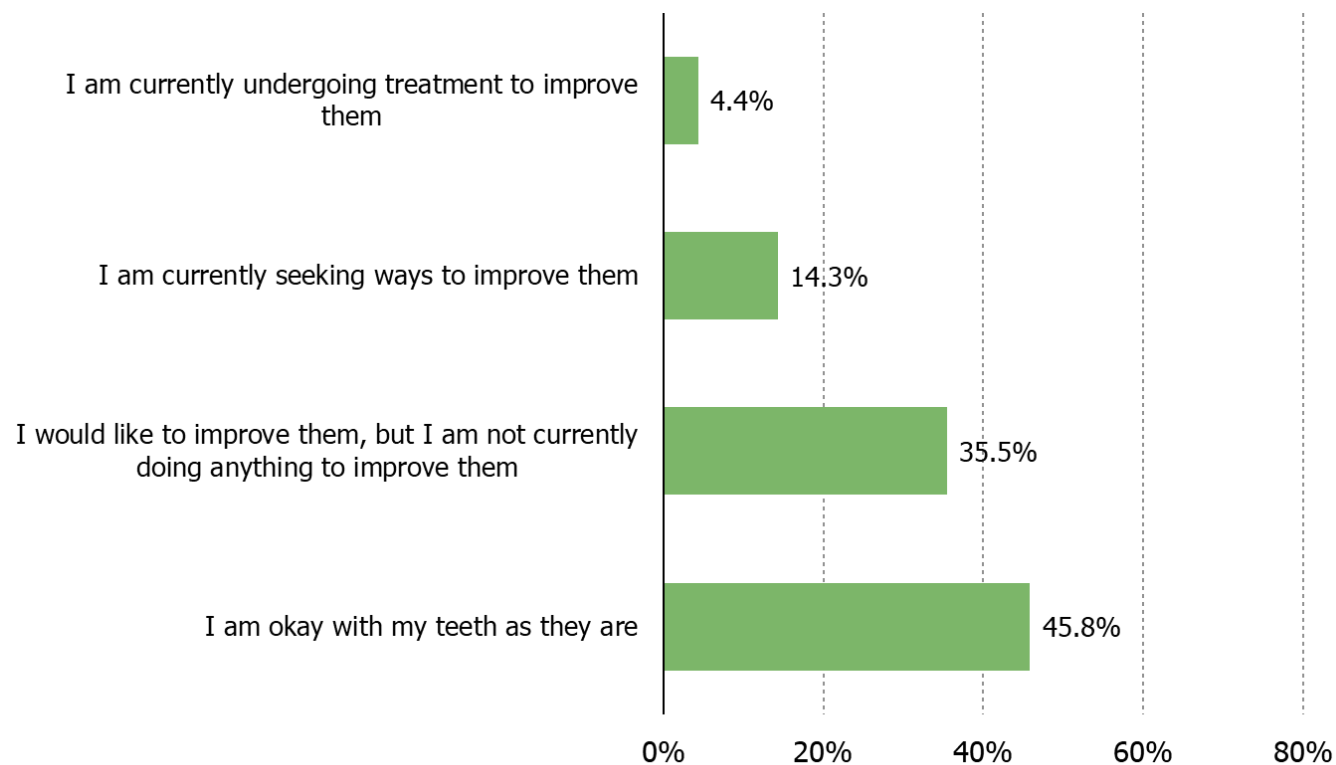
Are you aware of any the following (select ALL that apply)? | Aided Awareness

Posed to all respondents.



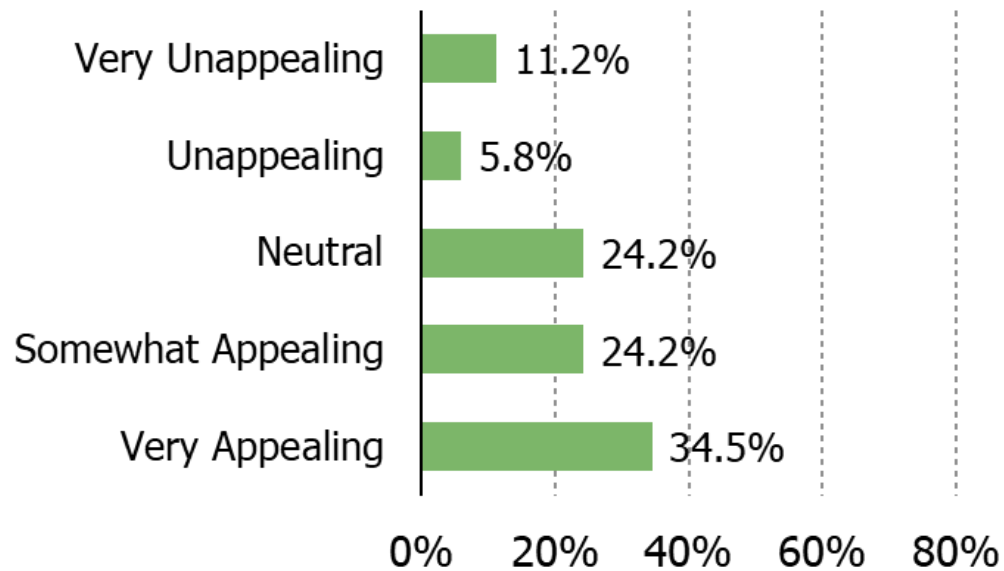
To what extent do you currently desire to improve your teeth?

Posed to all respondents.



How appealing would a nighttime teeth alignment product be to you?

Posed to respondents looking to improve their teeth aesthetic.

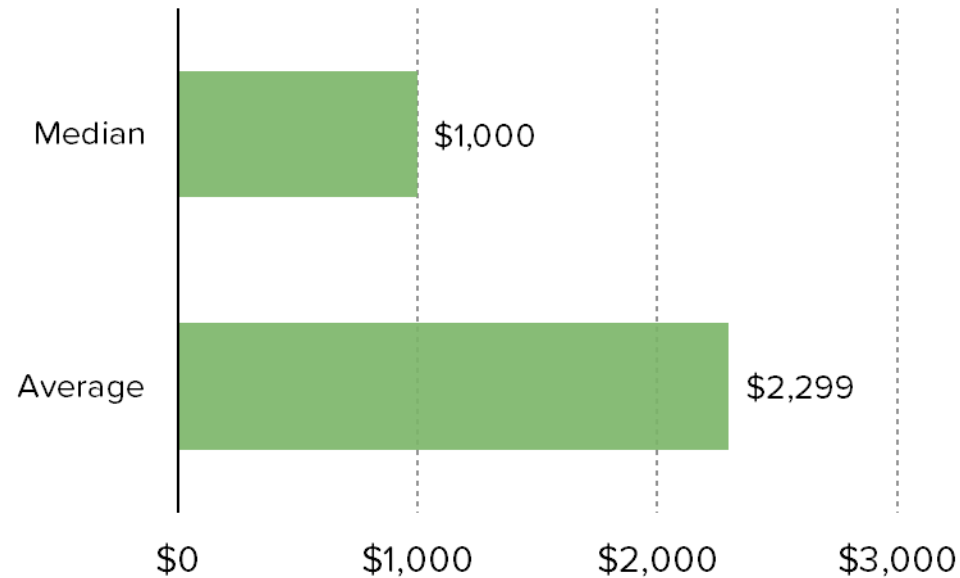


Product Description: Nighttime Clear Aligners require only 10 hours of nightly wear and are for users who are unwilling or unable to wear aligners for the typical 22 hours per day required for traditional clear aligner therapy.

Clear Aligners Survey Results

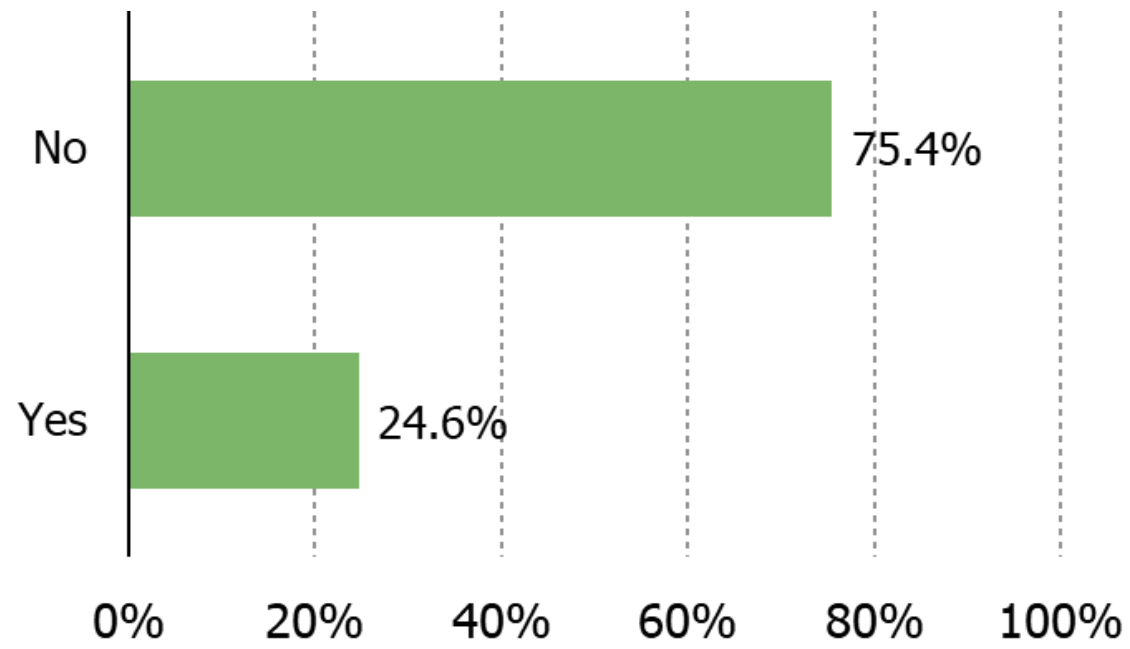
How much would you be willing to spend in order to improve your teeth aesthetic (ie, whiter, straighter, more visually appealing teeth)?

Posed to respondents looking to improve their teeth aesthetic.



Do you currently have or have you ever had braces for your teeth?

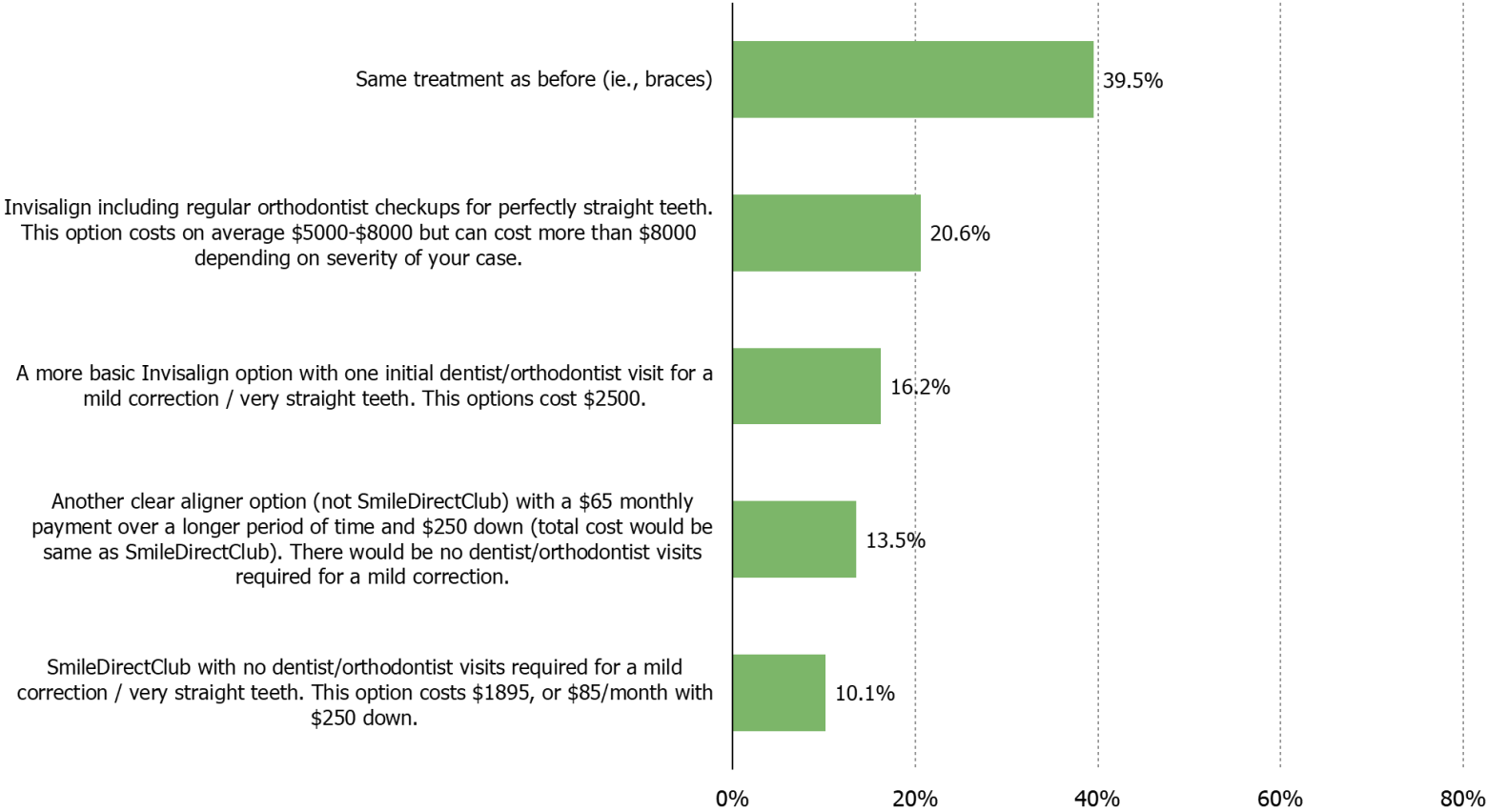
Posed to all respondents.



Clear Aligners Survey Results

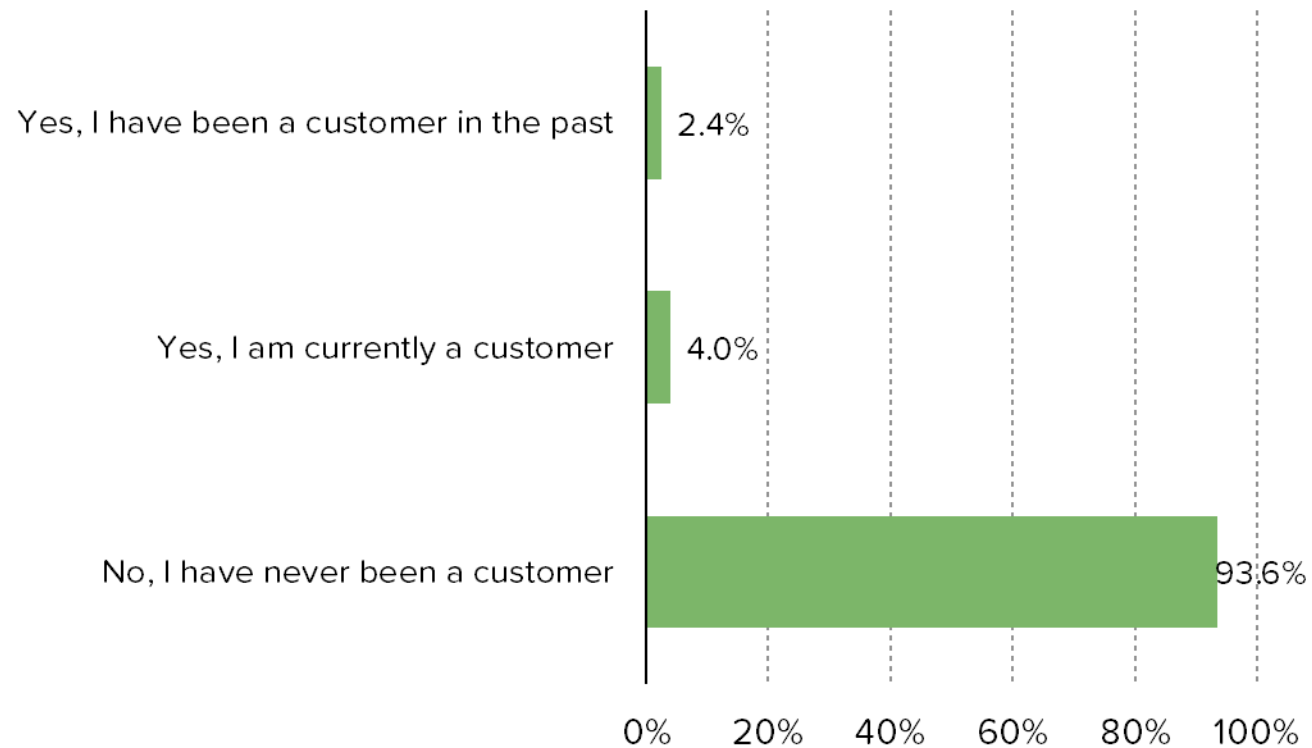
If you could redo your treatment, given the following options, which would you most likely choose?

Posed to all respondents who have had or currently have braces.



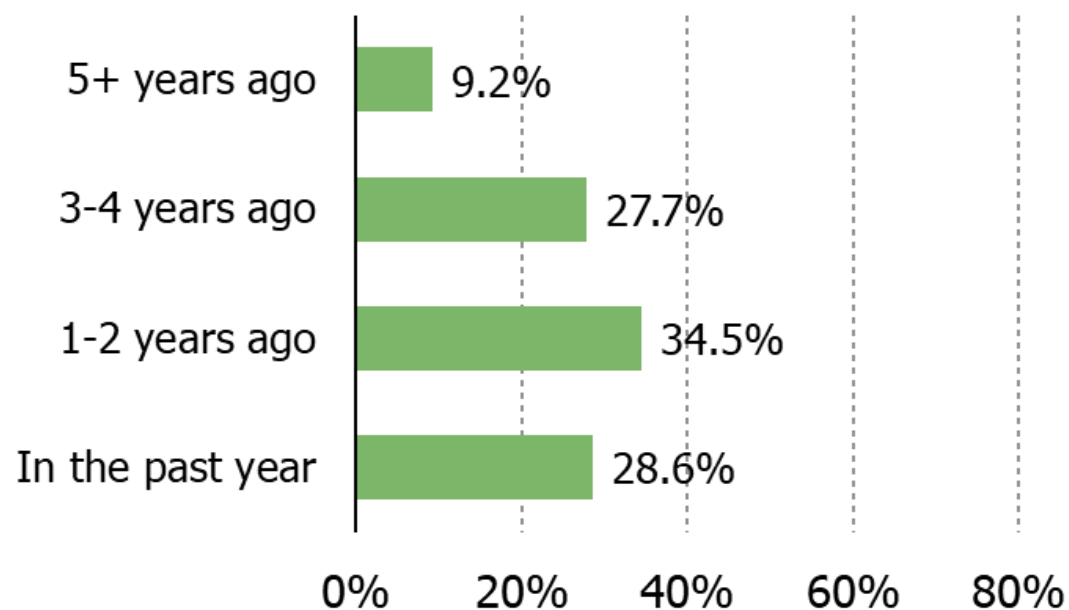
Have you ever been a customer of SmileDirectClub?

Posed to all respondents.



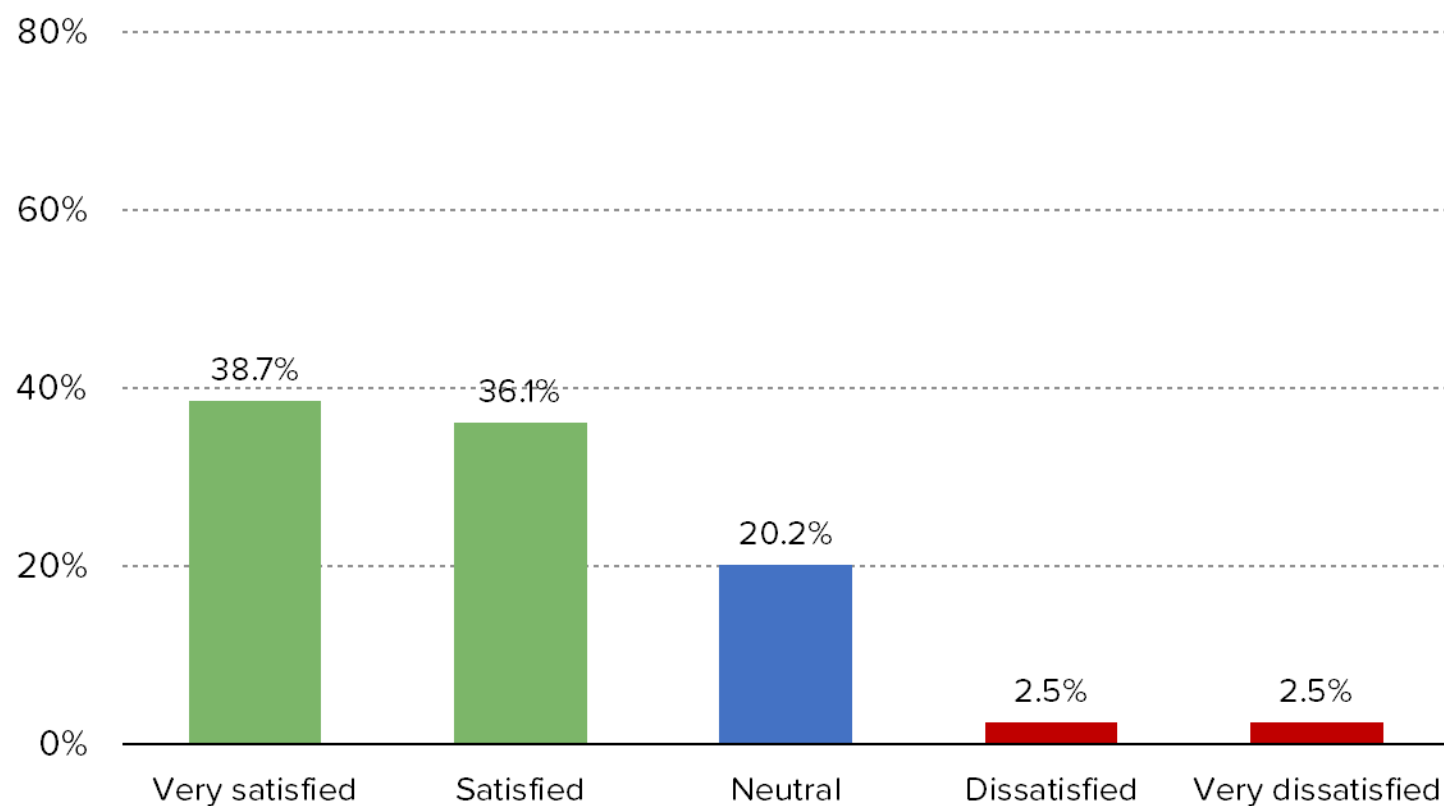
When were you a customer of SmileDirectClub?

Posed to all respondents who are former or current SDC customers.



How satisfied are/were you with your SmileDirectClub experience?

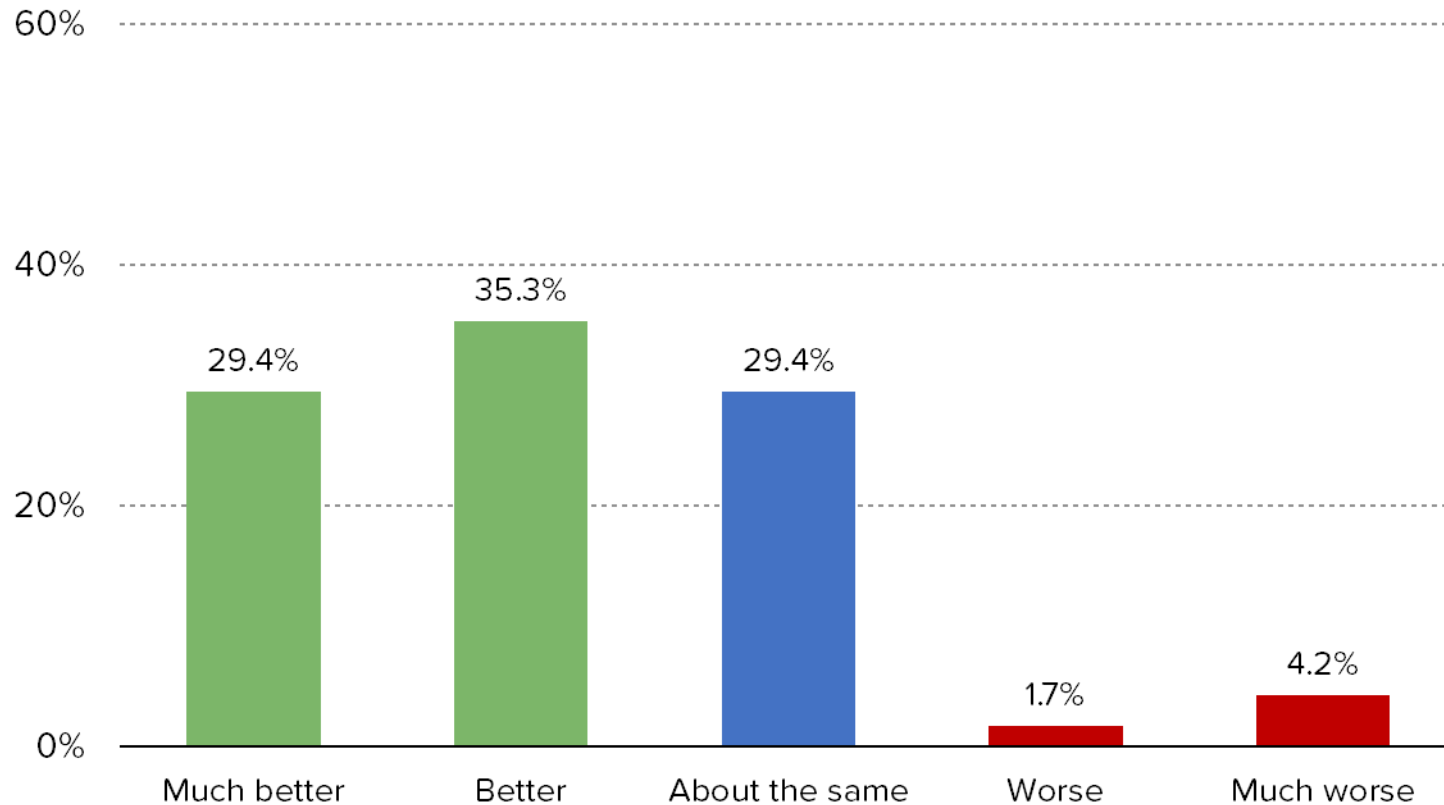
Posed to all respondents who are former or current SDC customers.



Clear Aligners Survey Results

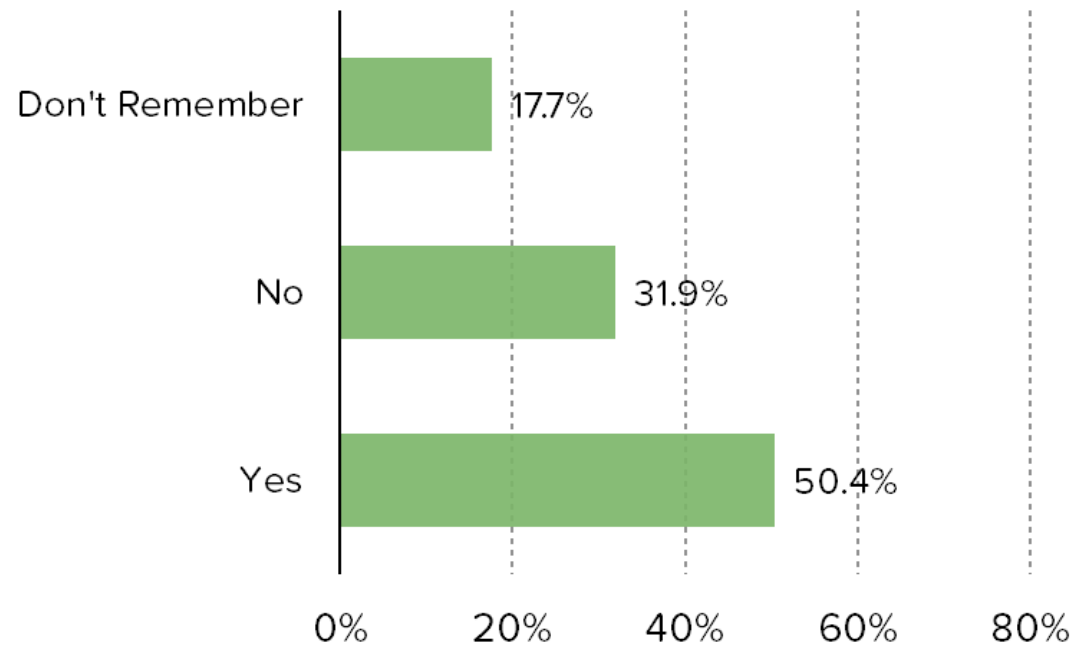
How did your teledentistry experience compare to a typical in-person dental visit in your view?

Posed to all respondents who are former or current SDC customers.



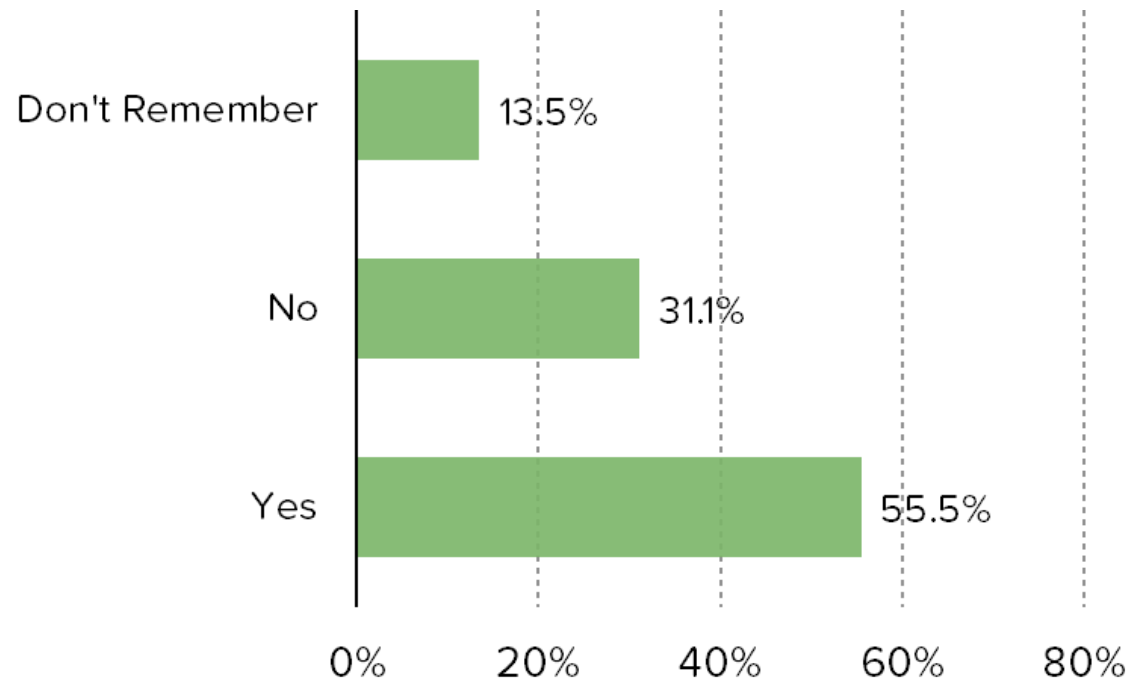
Did you book your 3-D scan at a SmileShop?

Posed to all respondents who are former or current SDC customers.



Did you perform your 3-D scan using an at-home impression kit?

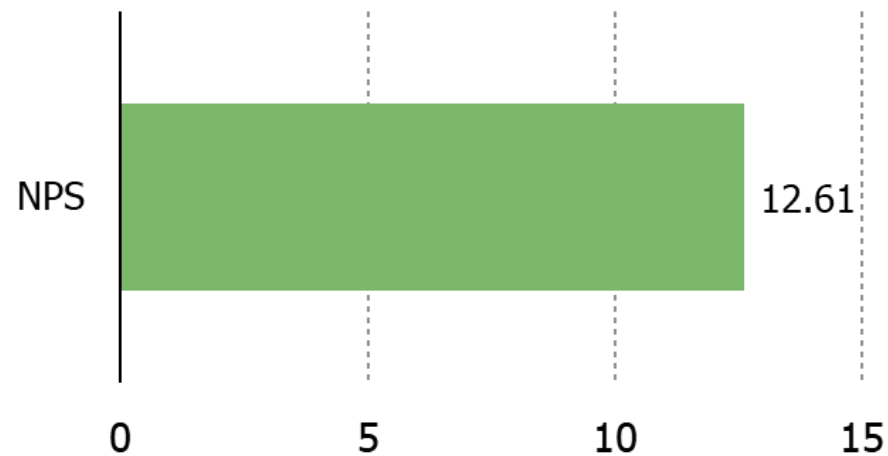
Posed to all respondents who are former or current SDC customers.



Clear Aligners Survey Results

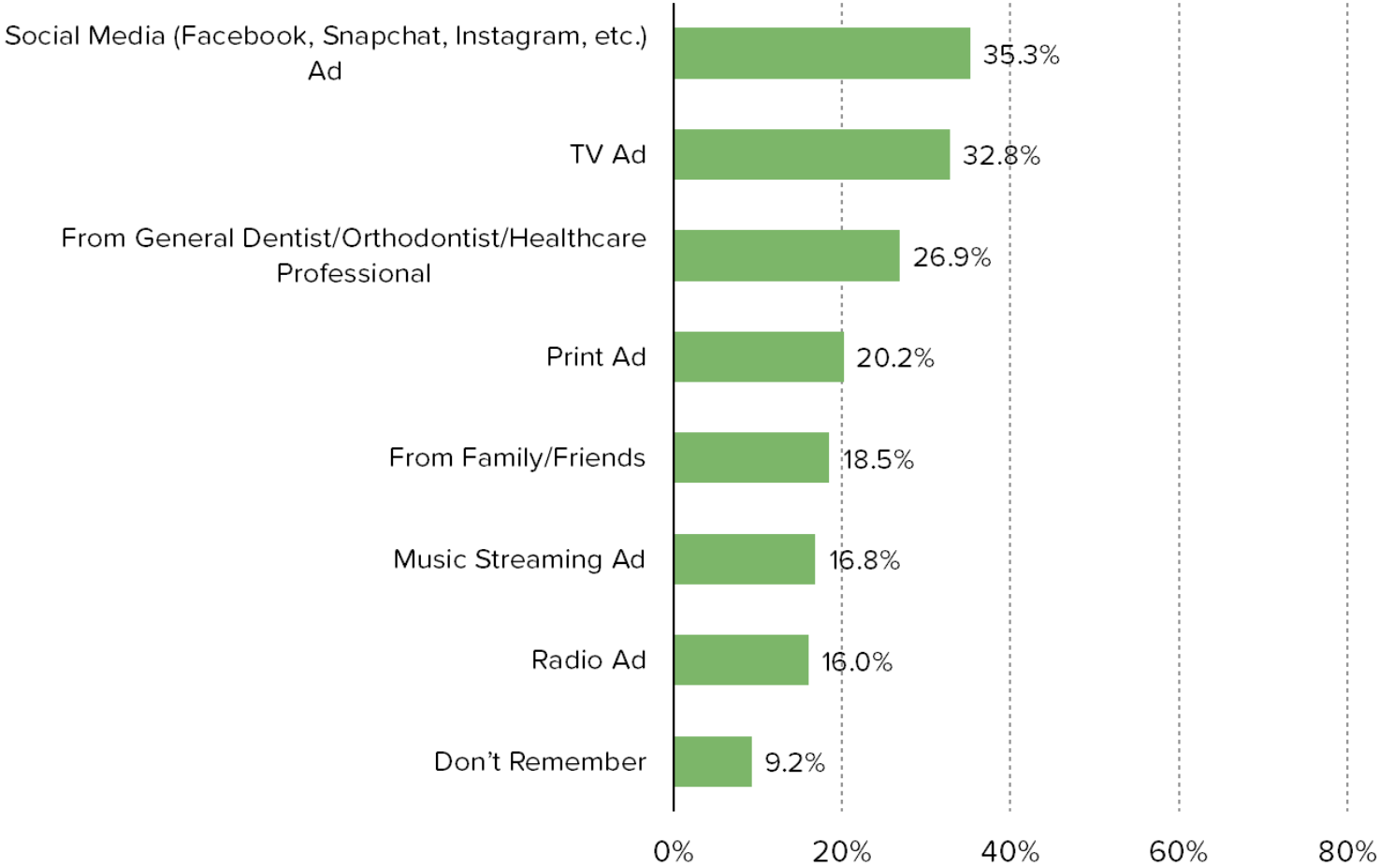
How likely is it that you would recommend SmileDirectClub to a friend or colleague?

Posed to all respondents who are former or current SDC customers.



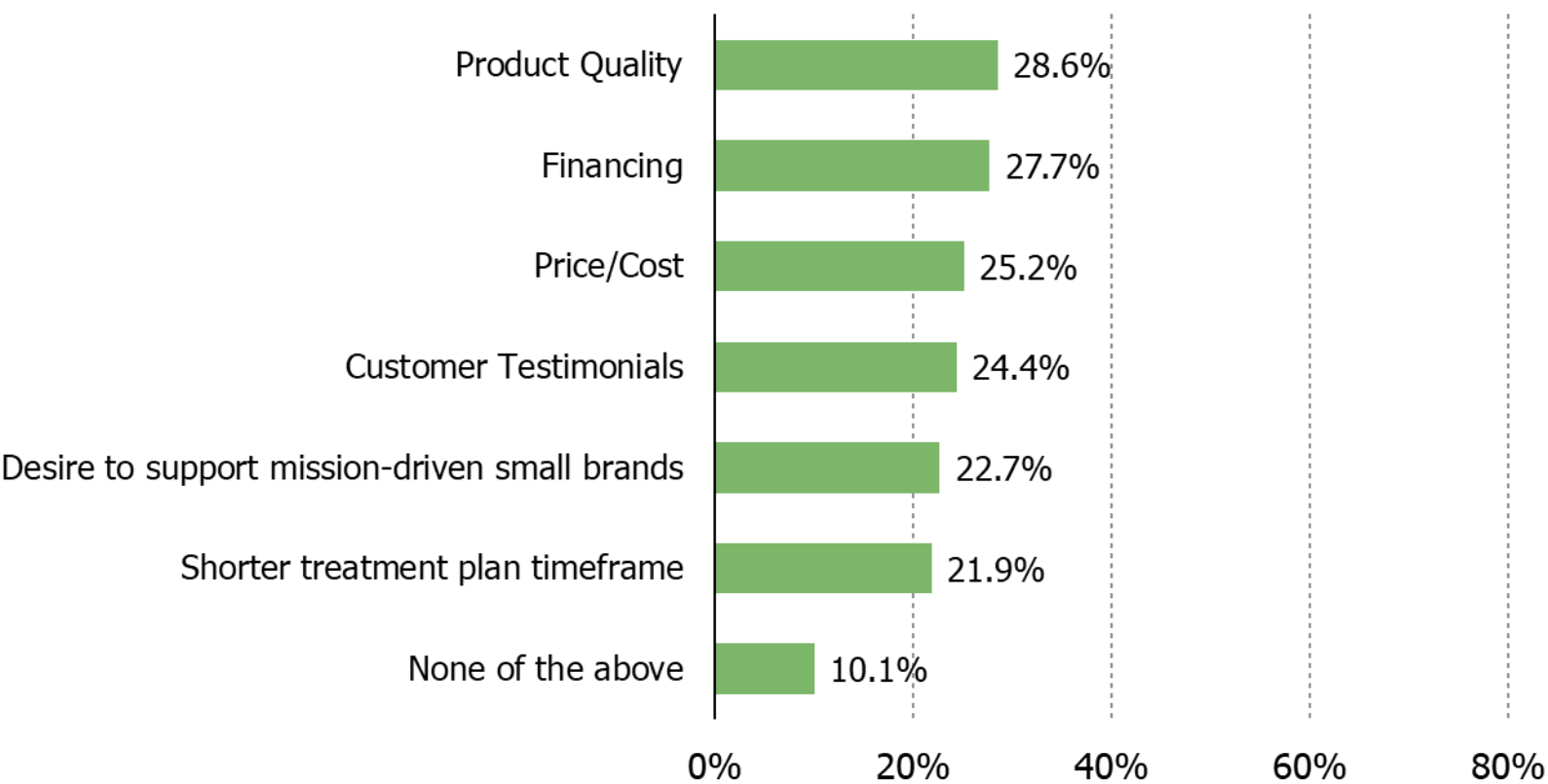
How did you first hear about SmileDirectClub?

Posed to all respondents who are former or current SDC customers.



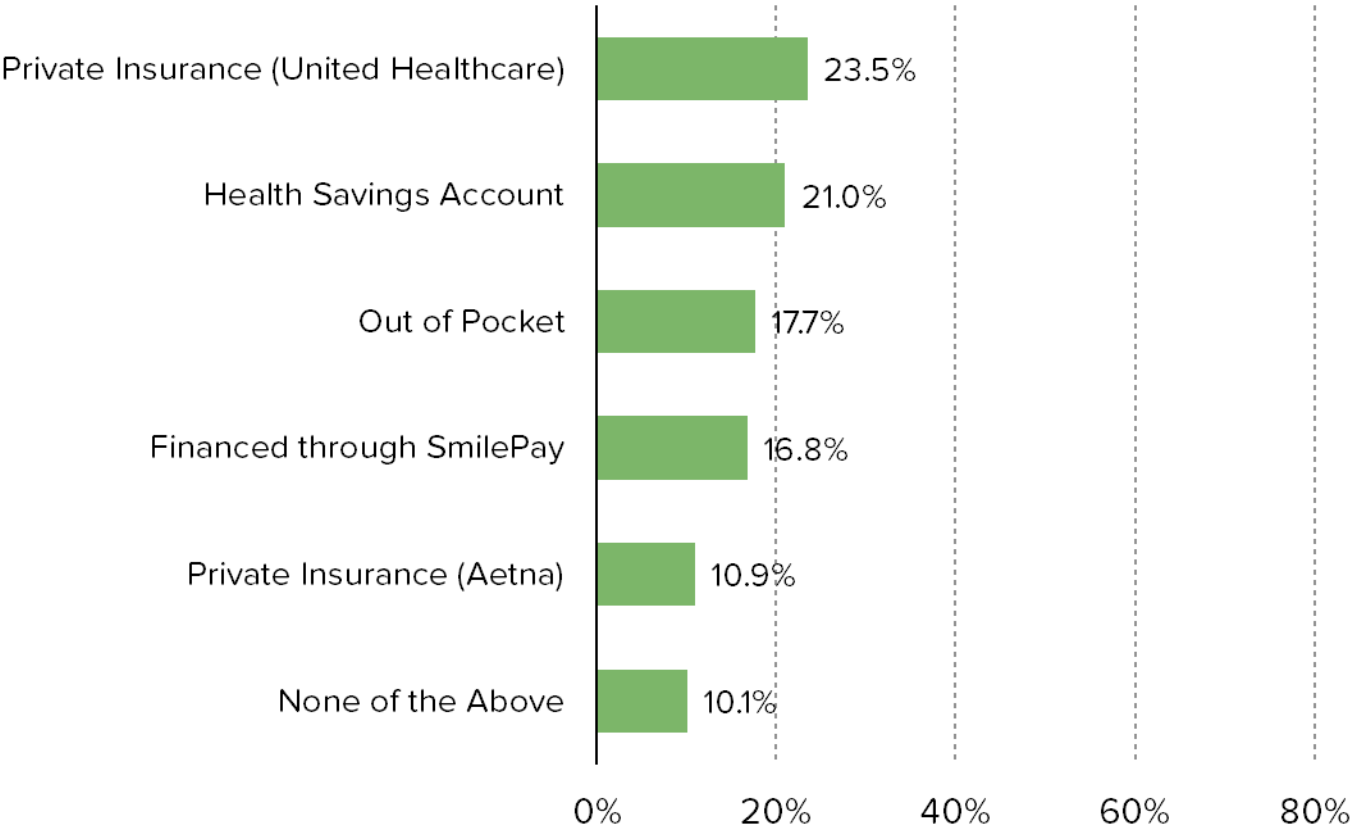
Why did you opt to become a SmileDirectClub customer/member (select ALL that apply)?

Posed to all respondents who are former or current SDC customers.



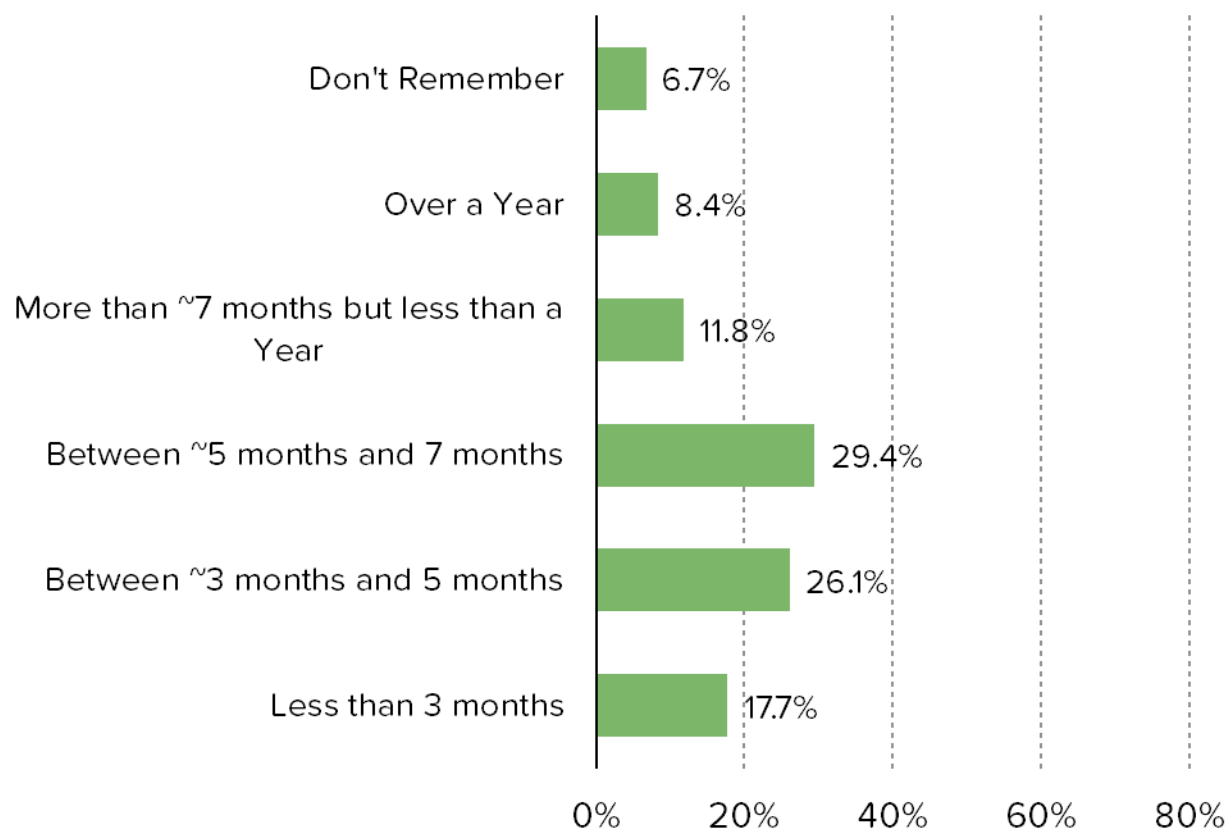
How did you finance your SmileDirectClub purchase? (Select ALL that apply)

Posed to all respondents who are former or current SDC customers.



Roughly how long did your treatment last from start to finish?

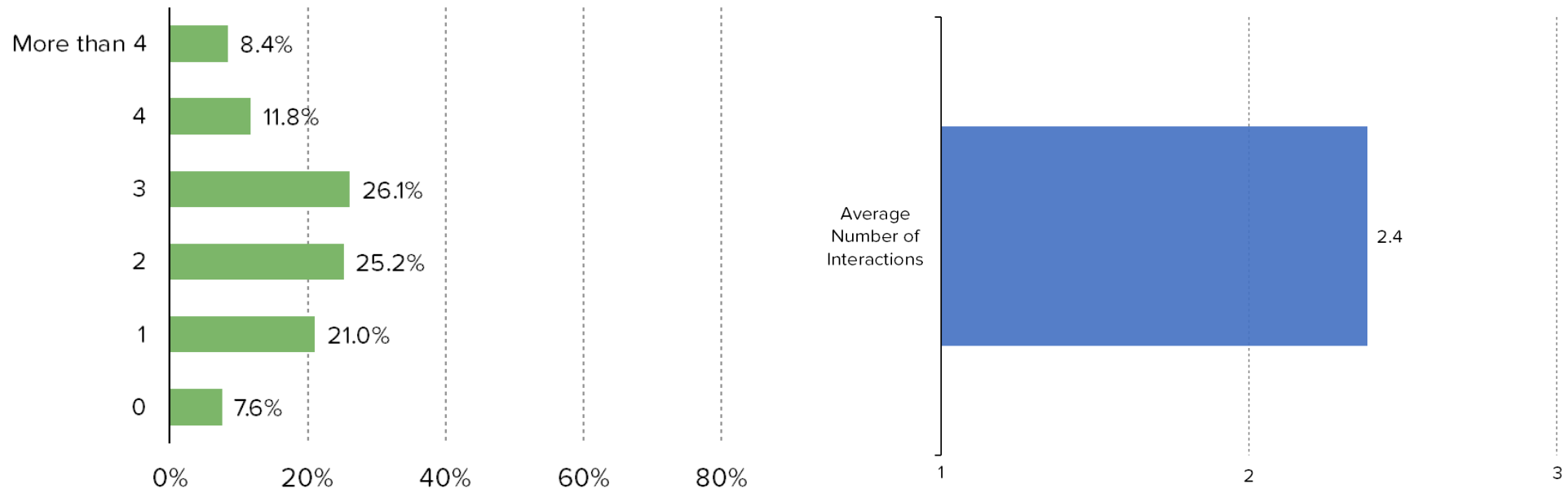
Posed to all respondents who are former or current SDC customers.



Clear Aligners Survey Results

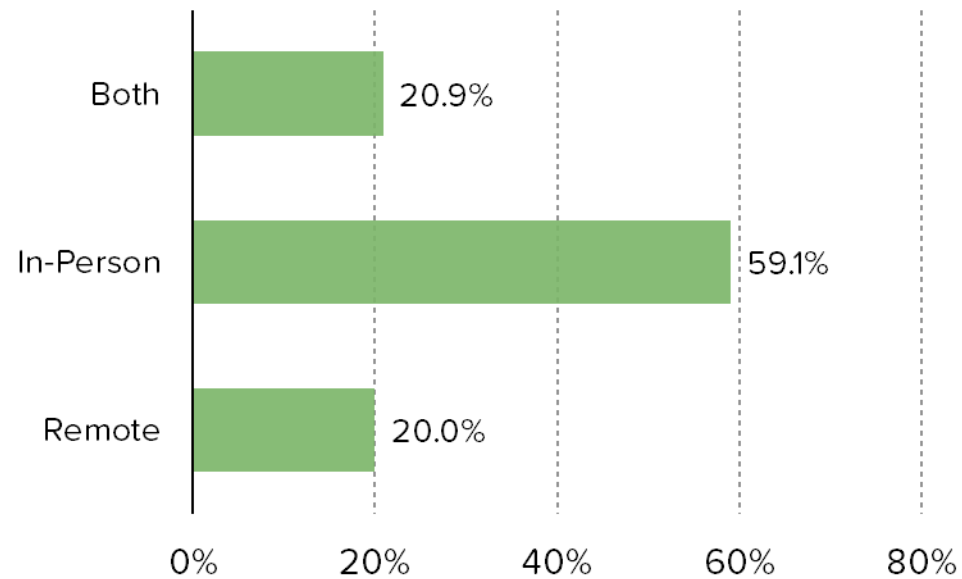
During your treatment, roughly how many interactions did you have with a duly licensed doctor/dentist/orthodontist?

Posed to all respondents who are former or current SDC customers.



If 1 or more interactions, were these interactions remote or in-person?

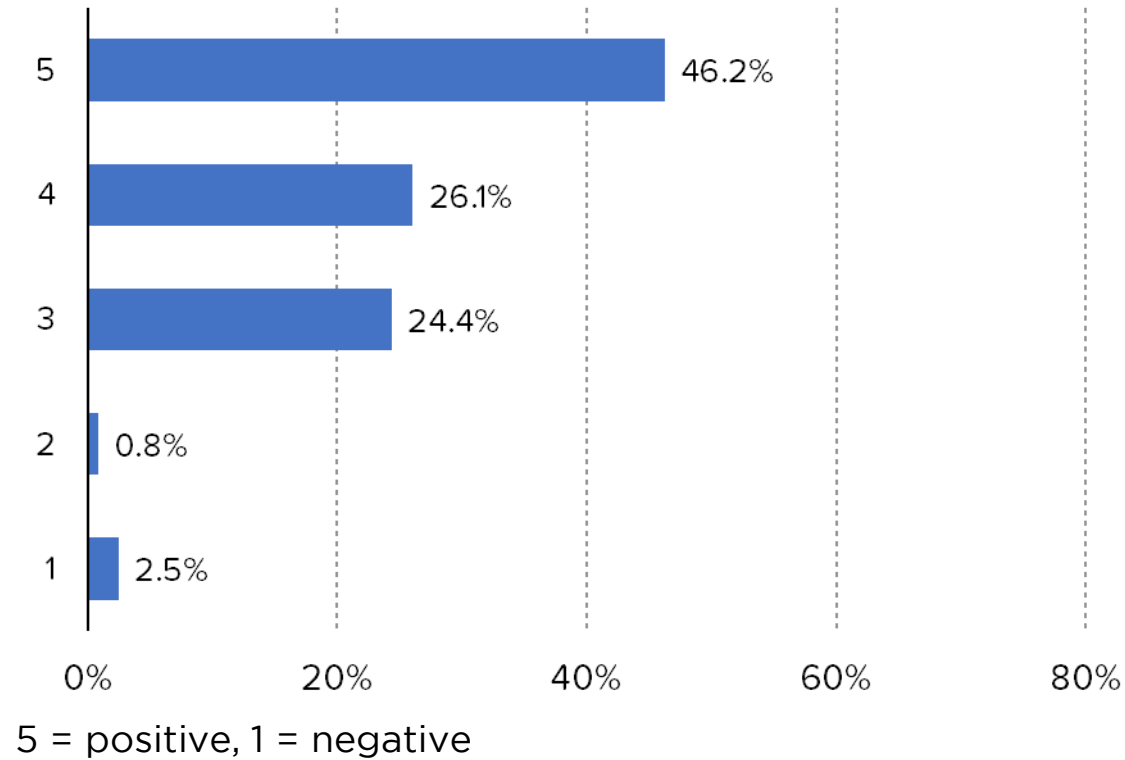
Posed to all respondents who are former or current SDC customers.



Clear Aligners Survey Results

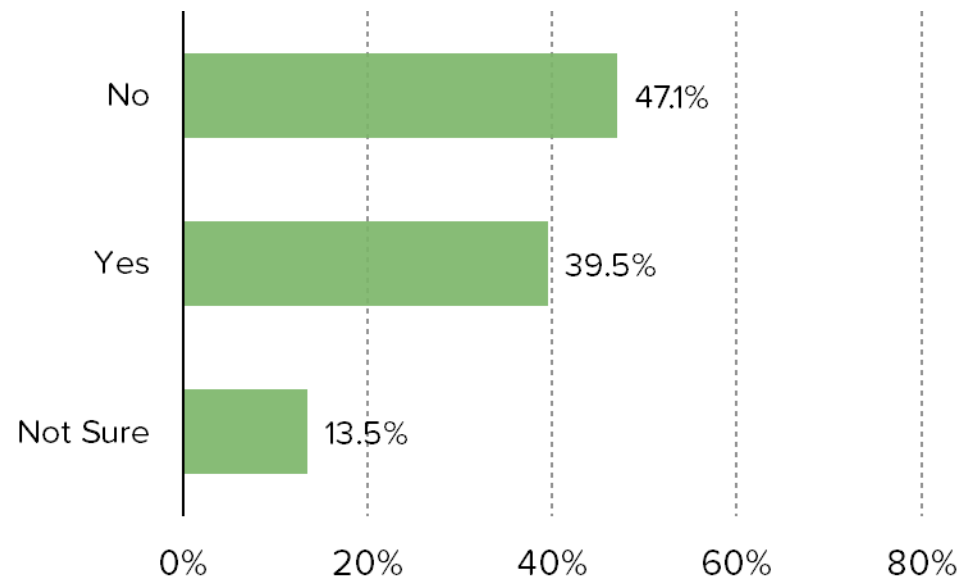
How would you rate your experience with SmileCheck (SmileDirectClub's consultation with a dentist/orthodontist via mobile app or video conferencing)?

Posed to all respondents who are former or current SDC customers.



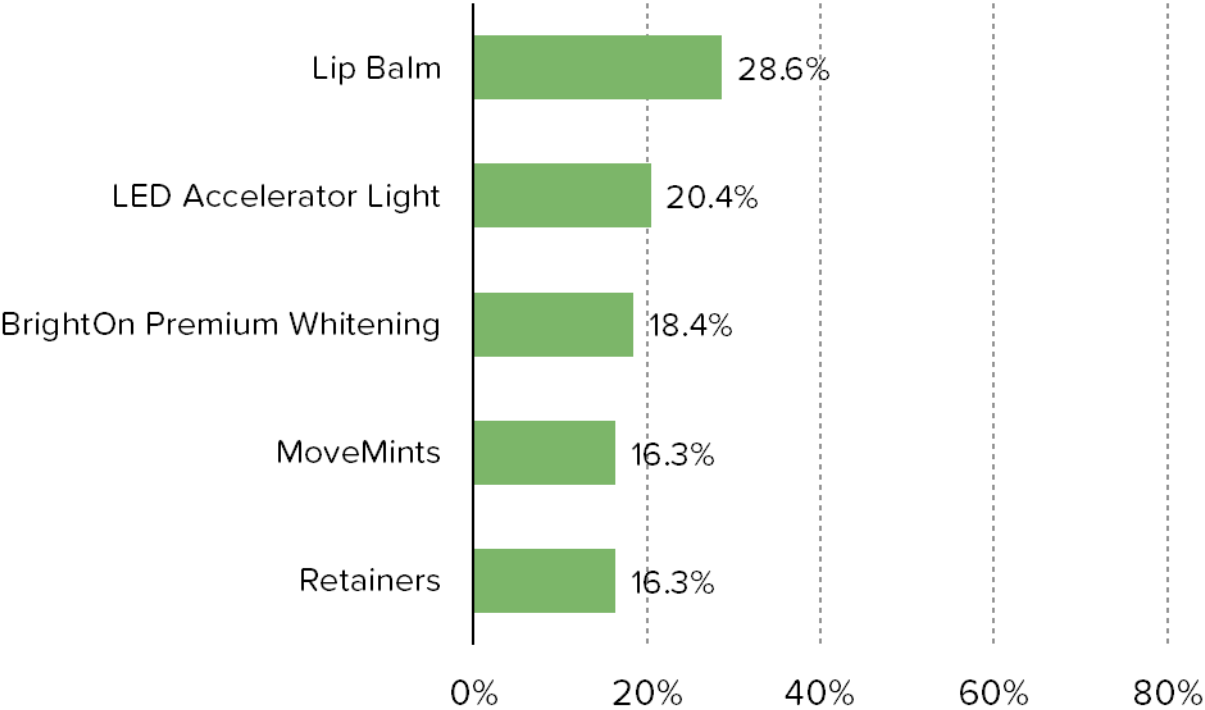
Outside of the aligners, did you purchase any additional products from SmileDirectClub?

Posed to all respondents who are former or current SDC customers.



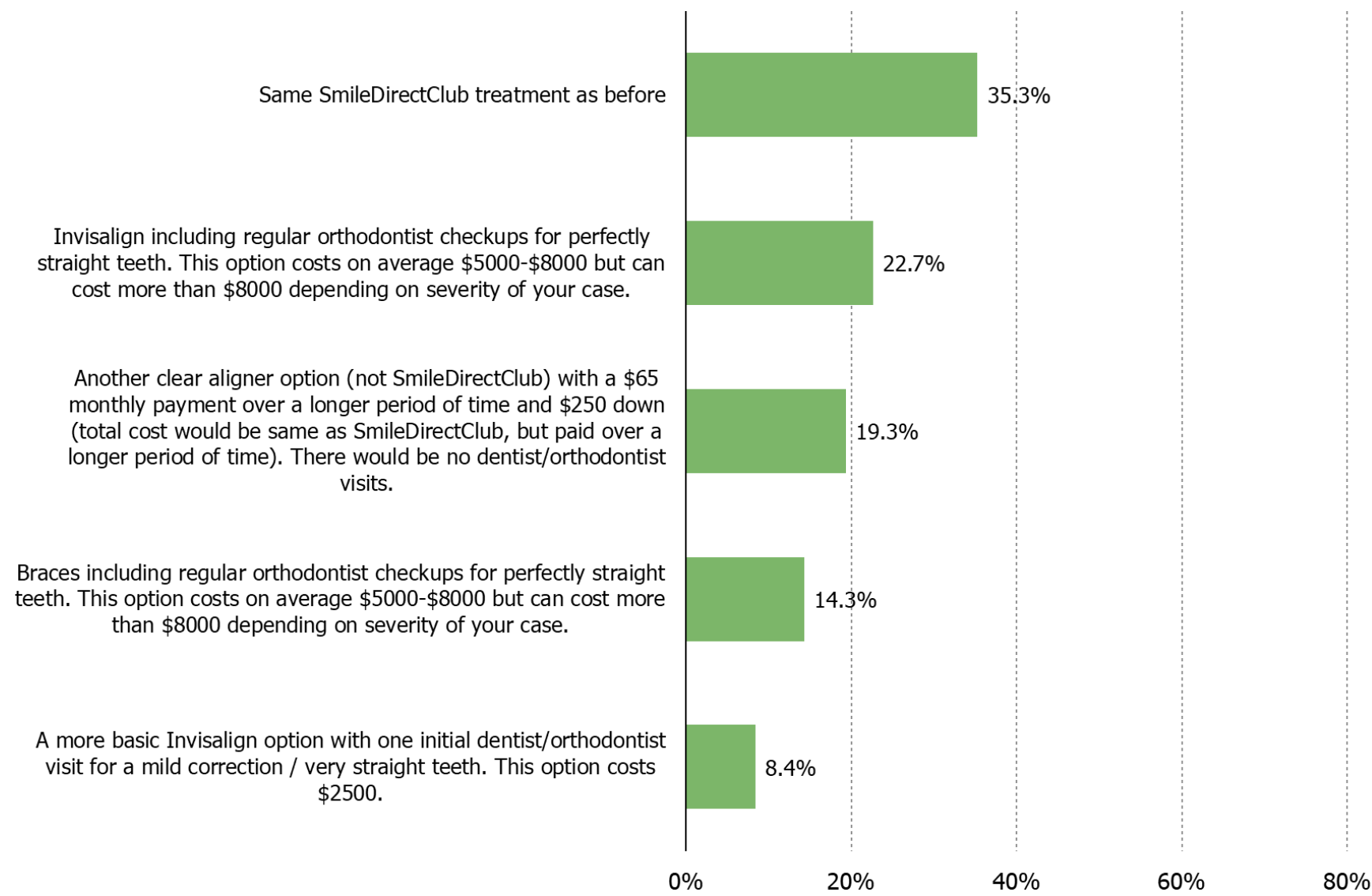
If yes, what products?

Posed to all respondents who are former or current SDC customers who purchased additional items from SDC.

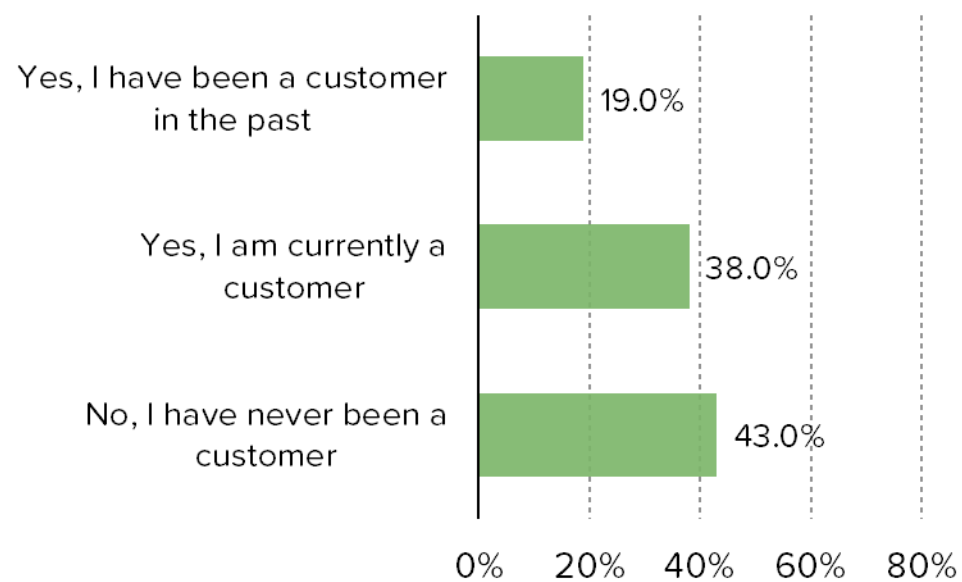


If you could redo your treatment, given the following options, which would you choose?

Posed to all respondents who are former or current SDC customers.

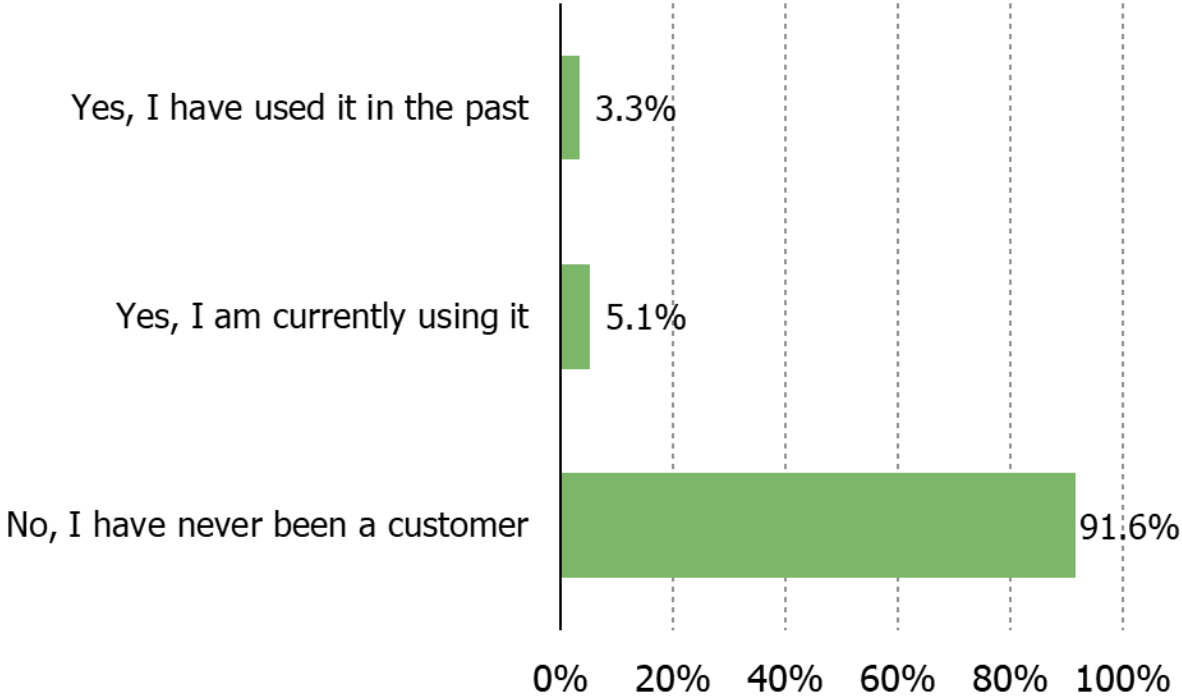


Invisalign Users (current and former) | Experience with SmileDirectClub.



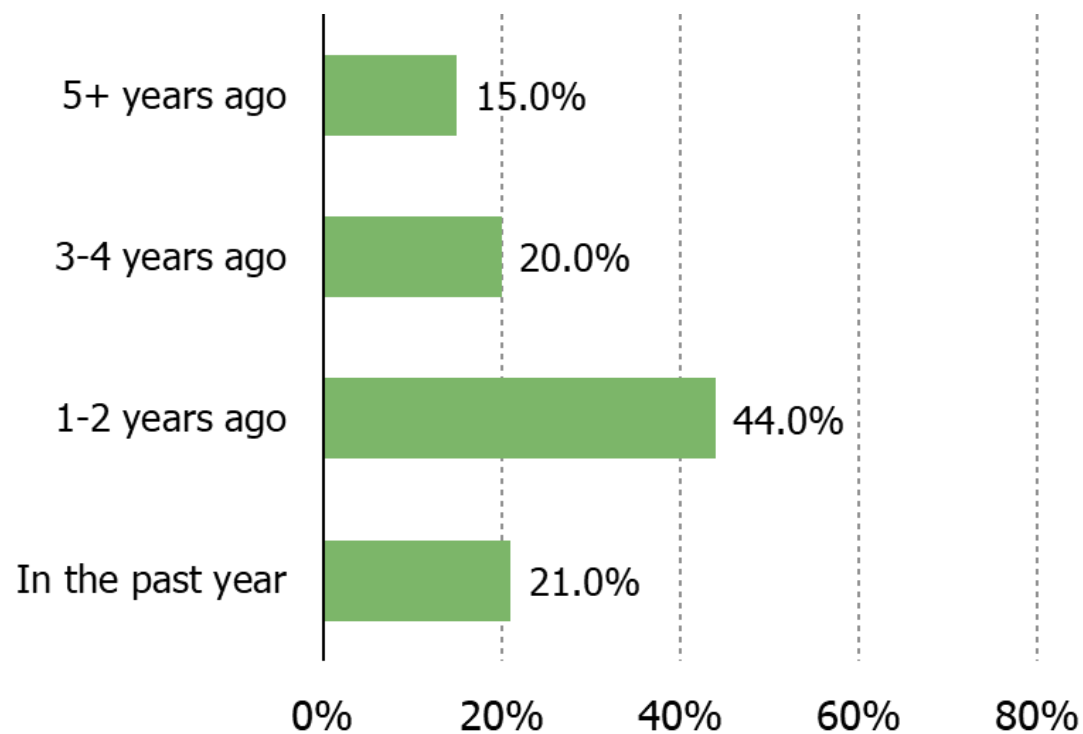
Have you ever been a customer of Invisalign?

Posed to all respondents.



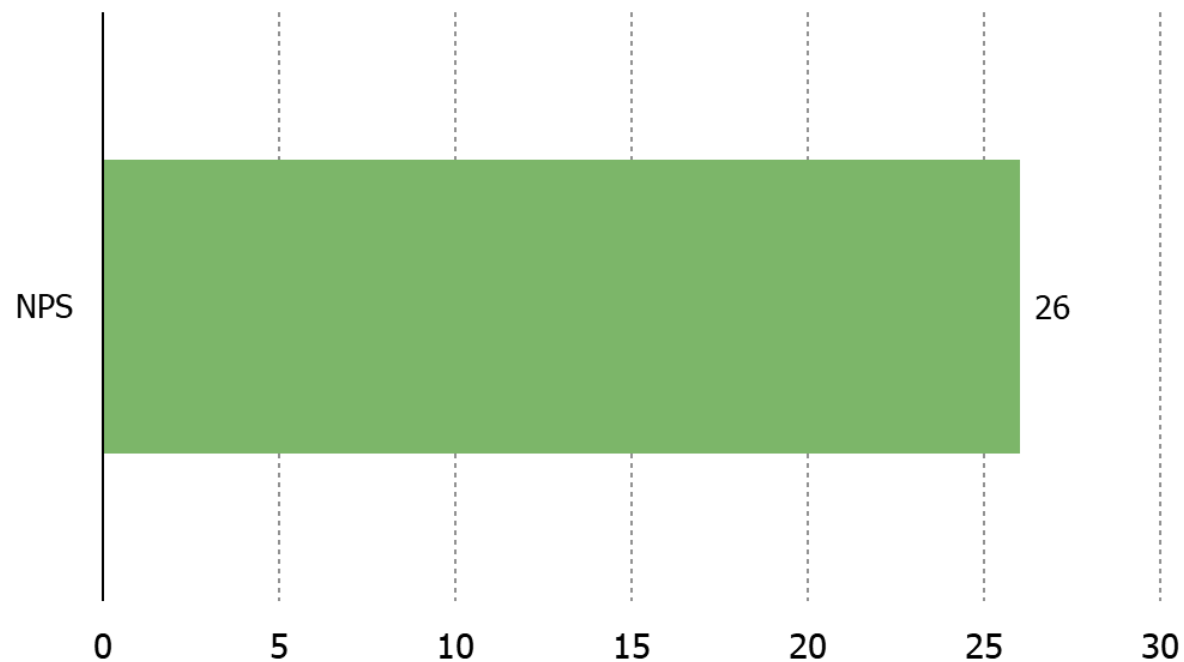
When were you a customer of Invisalign?

Posed to all respondents who confirmed they had used Invisalign.



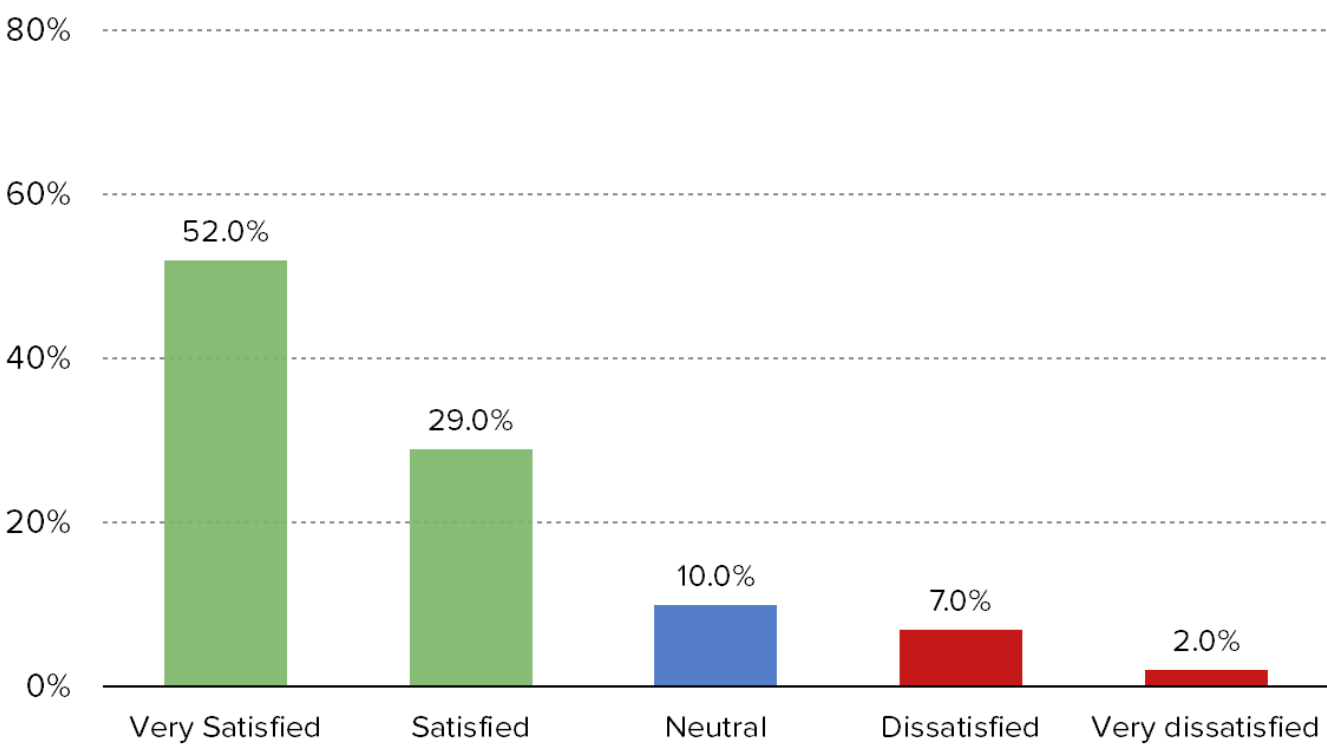
How likely is it that you would recommend Invisalign to a friend or colleague?

Posed to all respondents who confirmed they had used Invisalign.



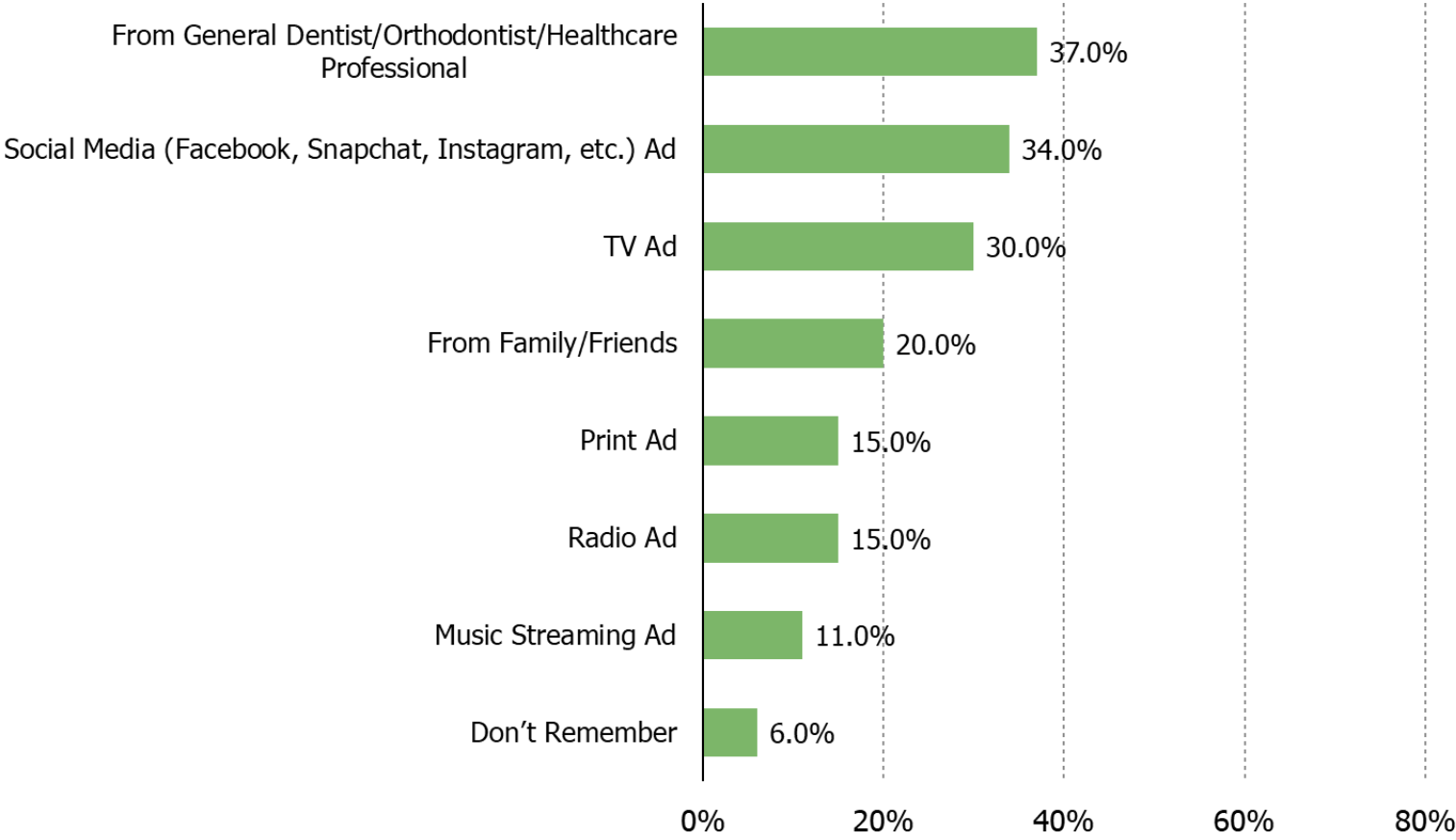
How satisfied are/were you with your Invisalign experience?

Posed to all respondents who confirmed they had used Invisalign.



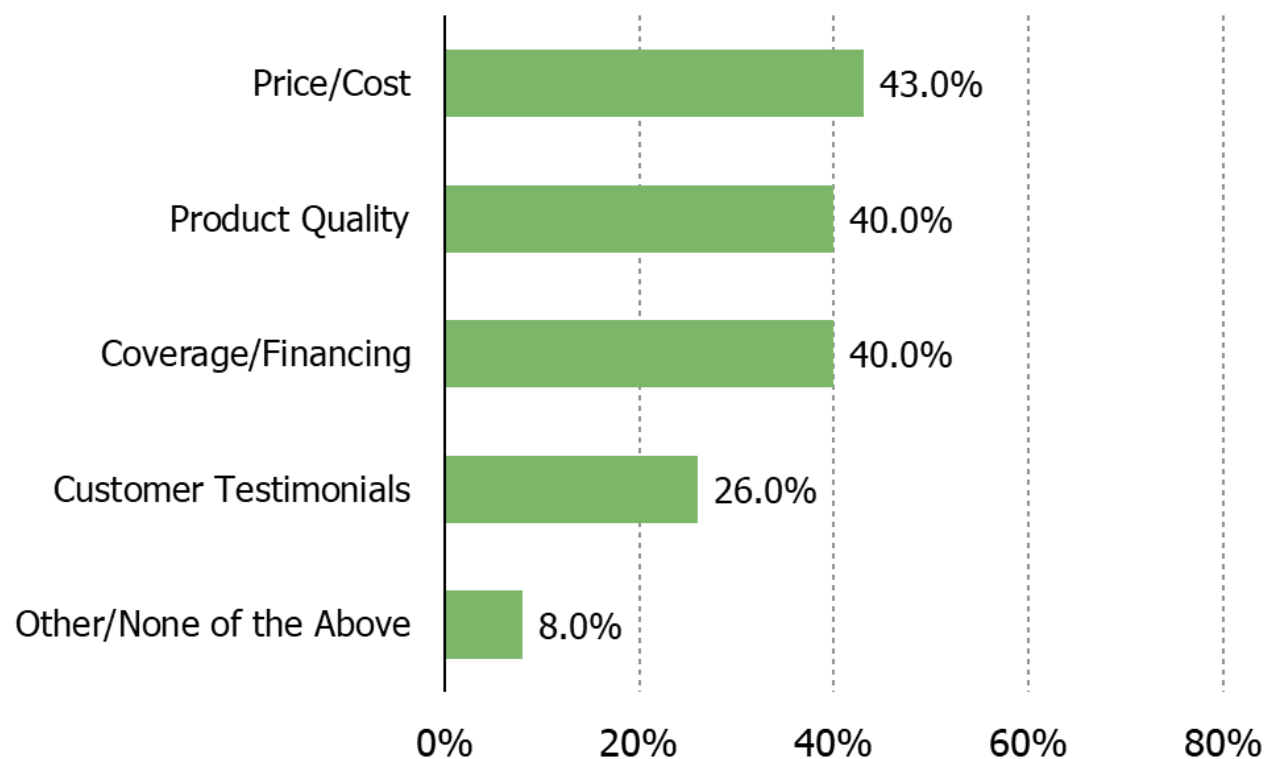
How did you first hear about Invisalign?

Posed to all respondents who confirmed they had used Invisalign.



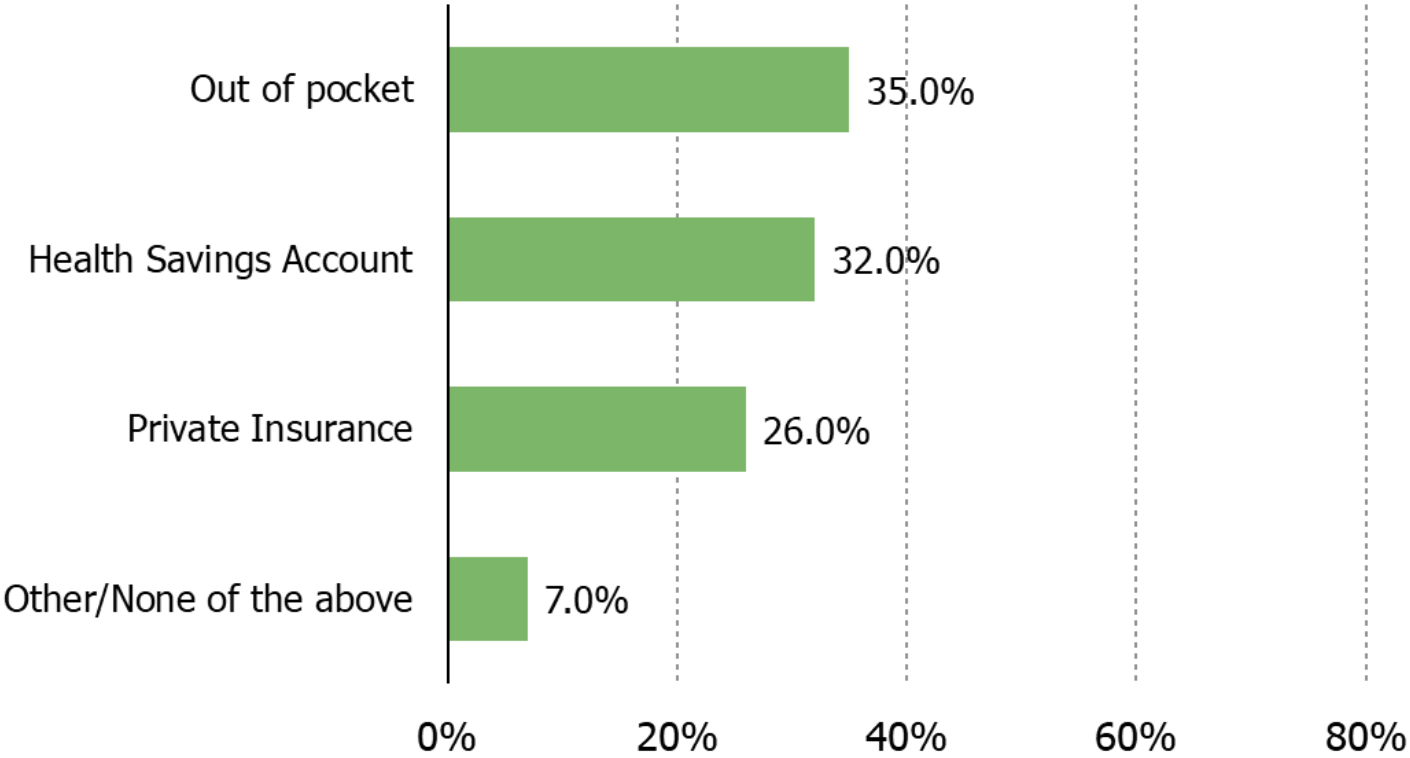
Why did you opt to become an Invisalign user (select ALL that apply)?

Posed to all respondents who confirmed they had used Invisalign.



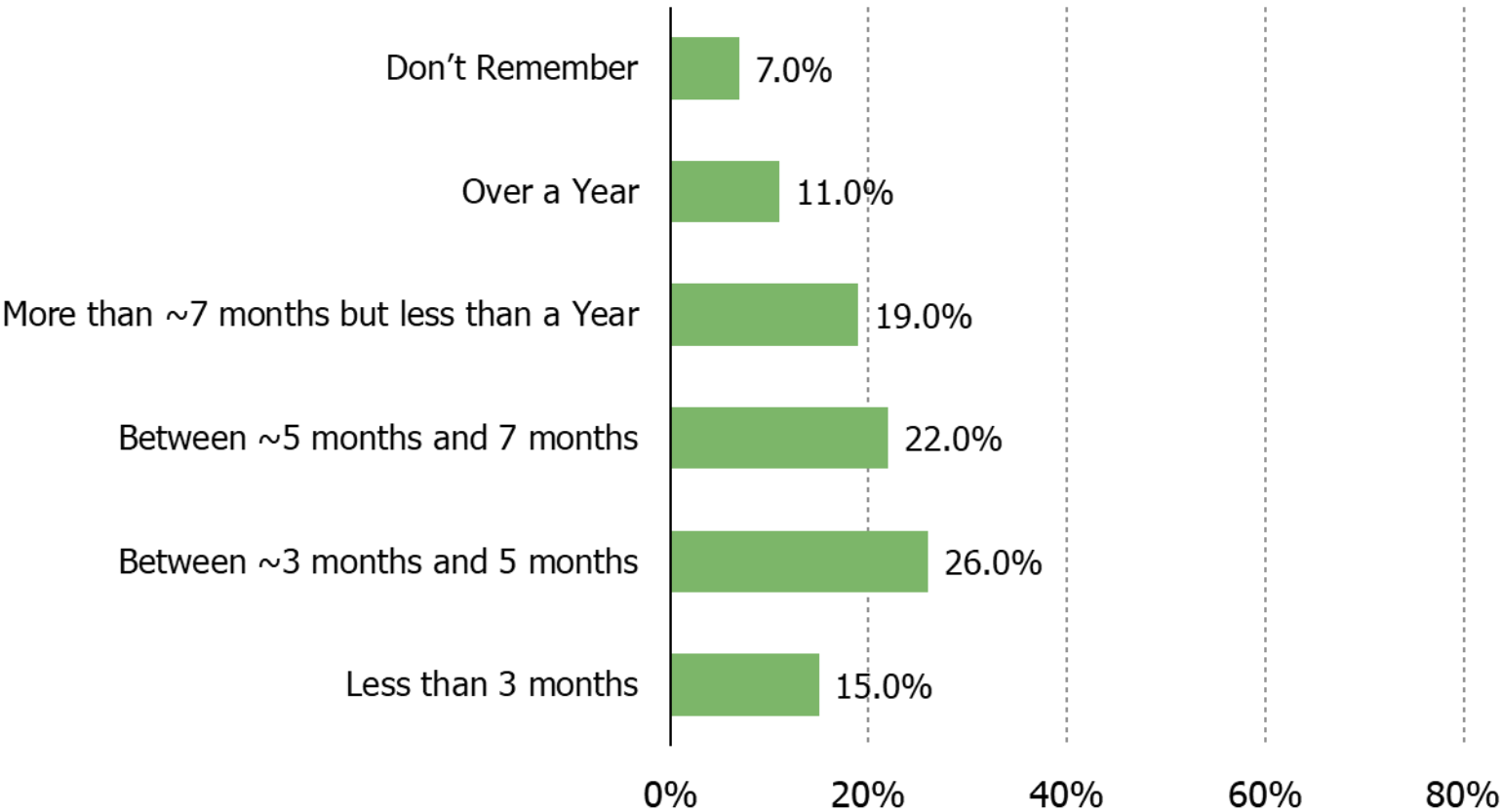
How did you finance your Invisalign purchase?

Posed to all respondents who confirmed they had used Invisalign.



Roughly how long did your treatment plan last from start to finish?

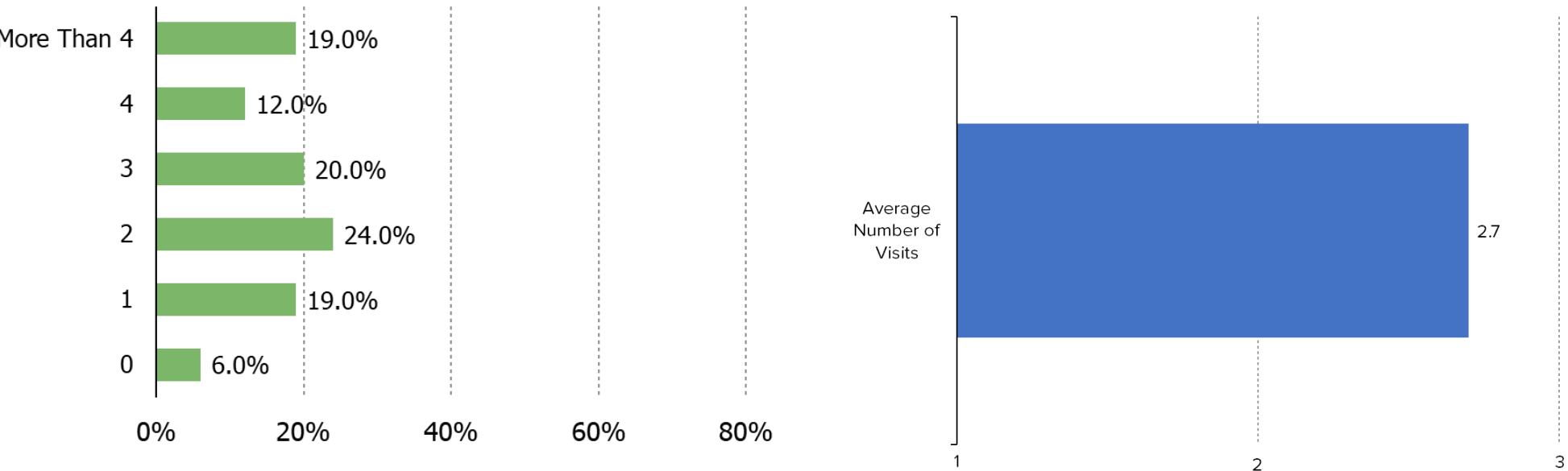
Posed to all respondents who confirmed they had used Invisalign.



Clear Aligners Survey Results

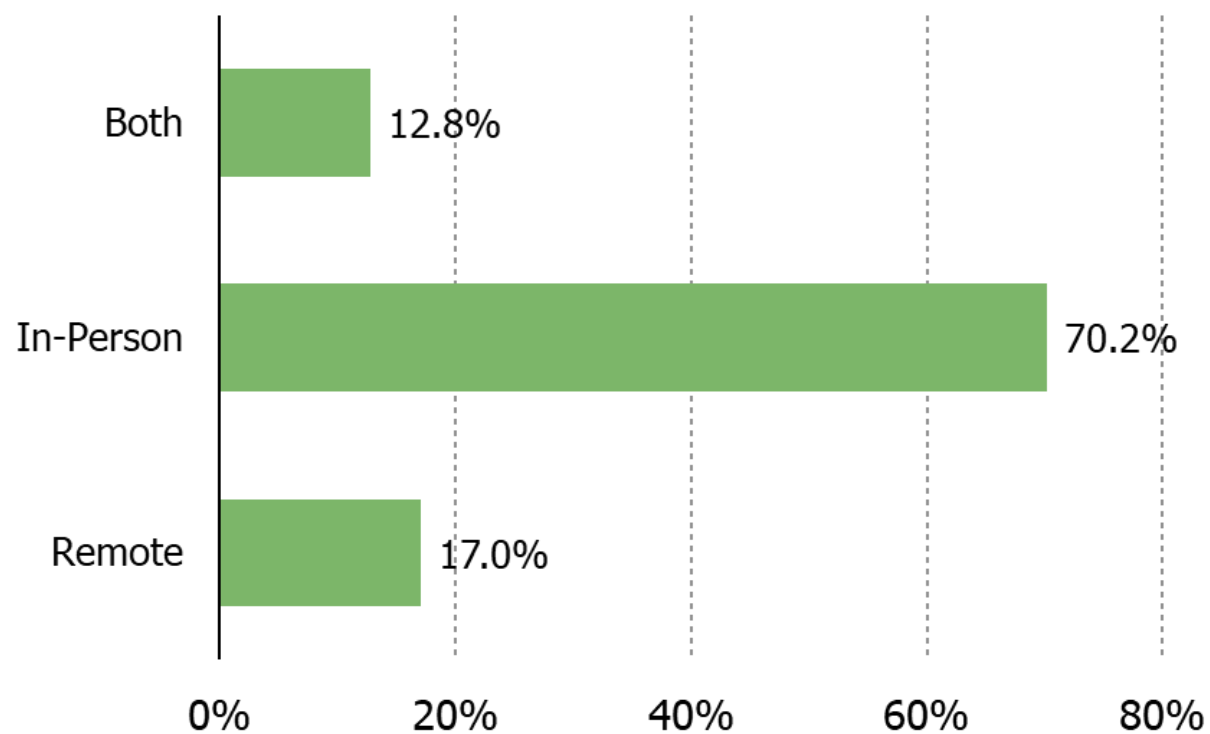
During your treatment, roughly how many interactions did you have with a duly licensed doctor/dentist/orthodontist?

Posed to all respondents who confirmed they had used Invisalign.



If 1 or more interactions, were these interactions remote or in-person?

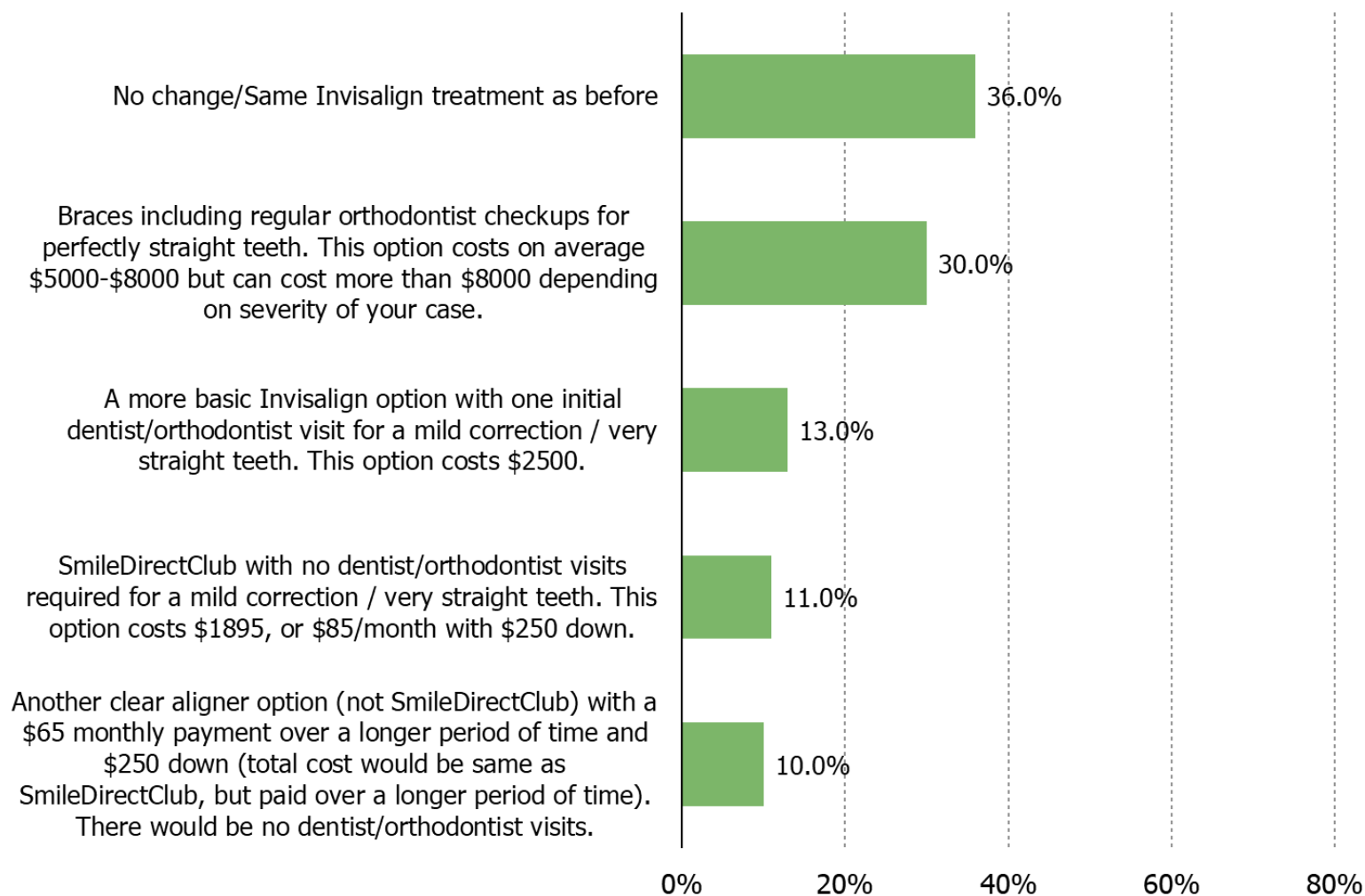
Posed to all respondents who confirmed they had used Invisalign.



Clear Aligners Survey Results

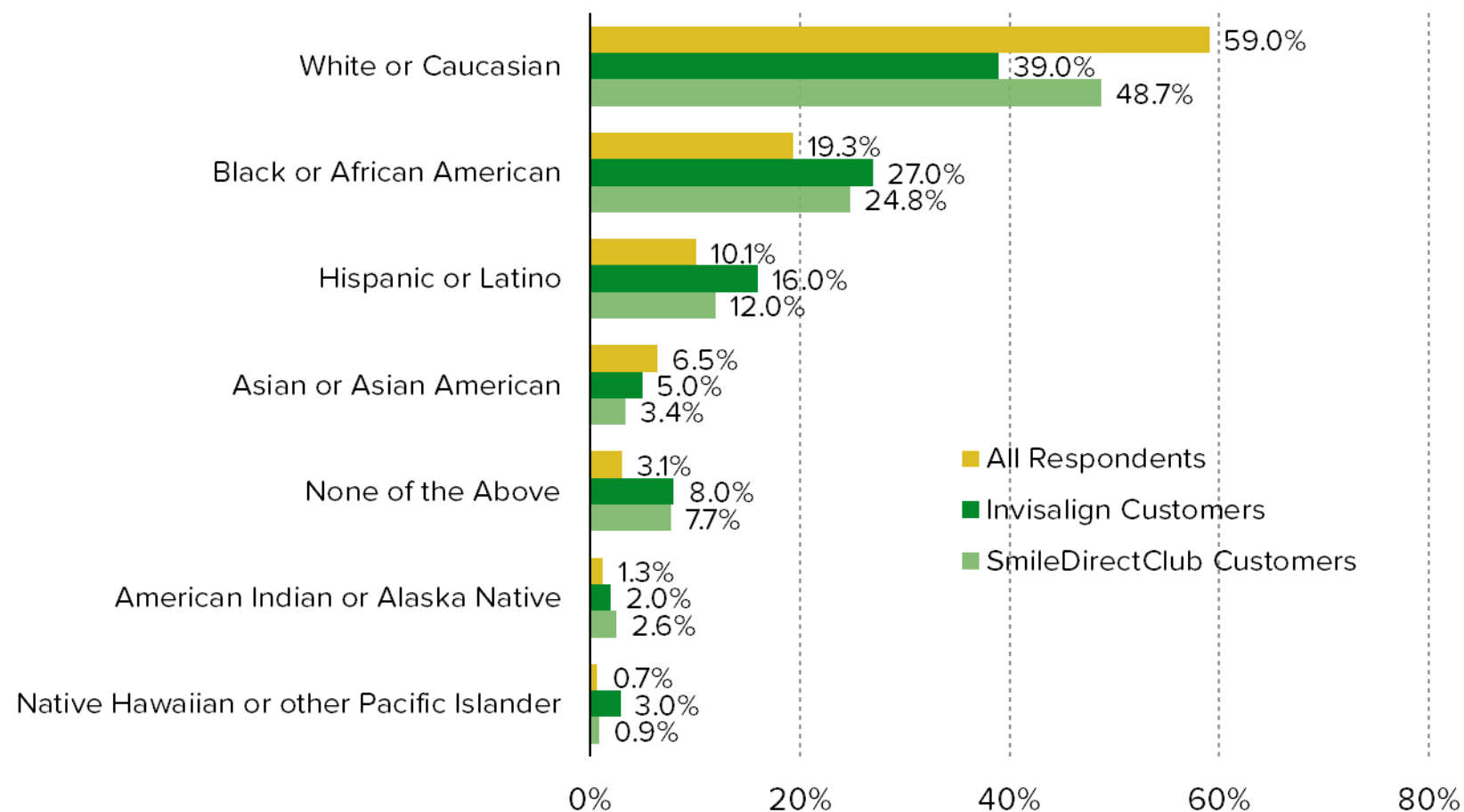
If you could redo your treatment, given the following options, which would you most likely choose?

Posed to all respondents who confirmed they had used Invisalign.



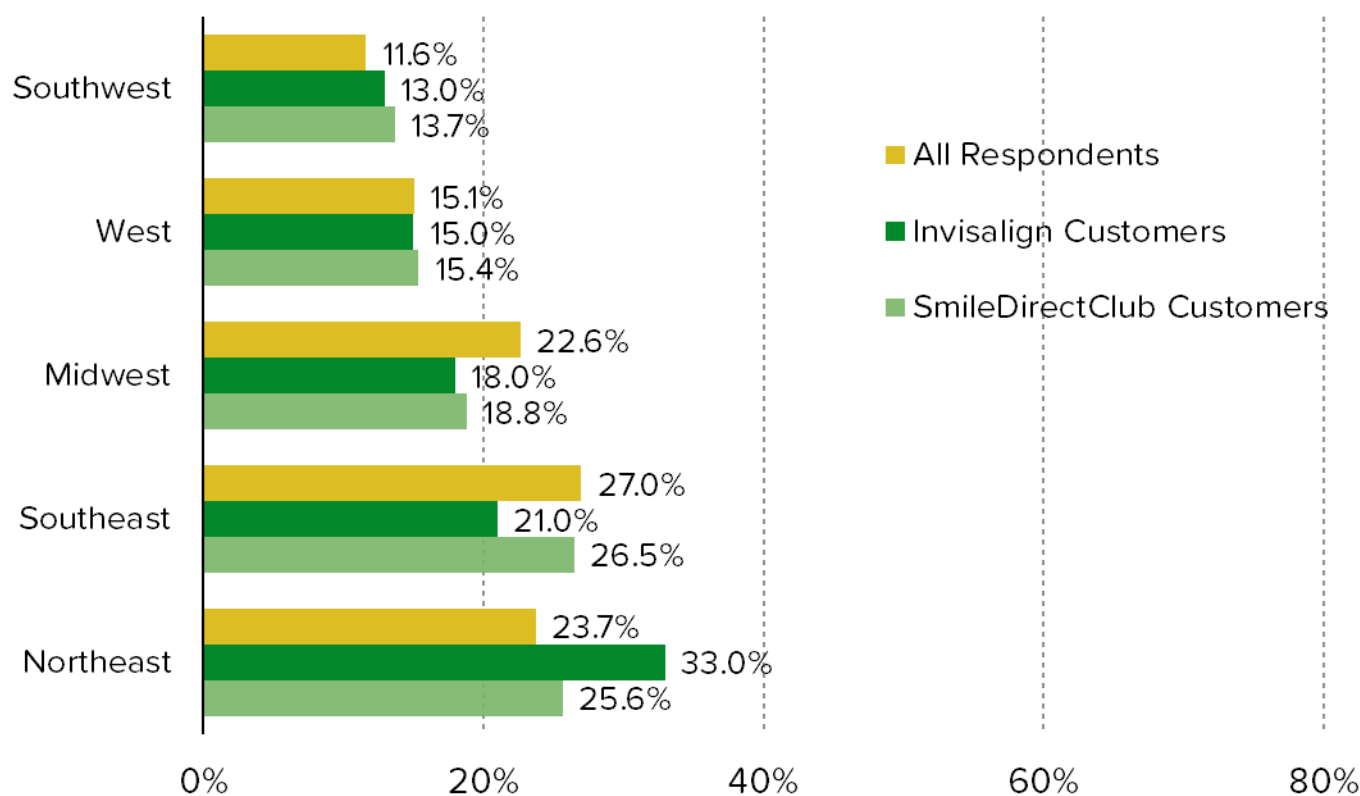
What is your ethnicity?

Posed to all respondents.



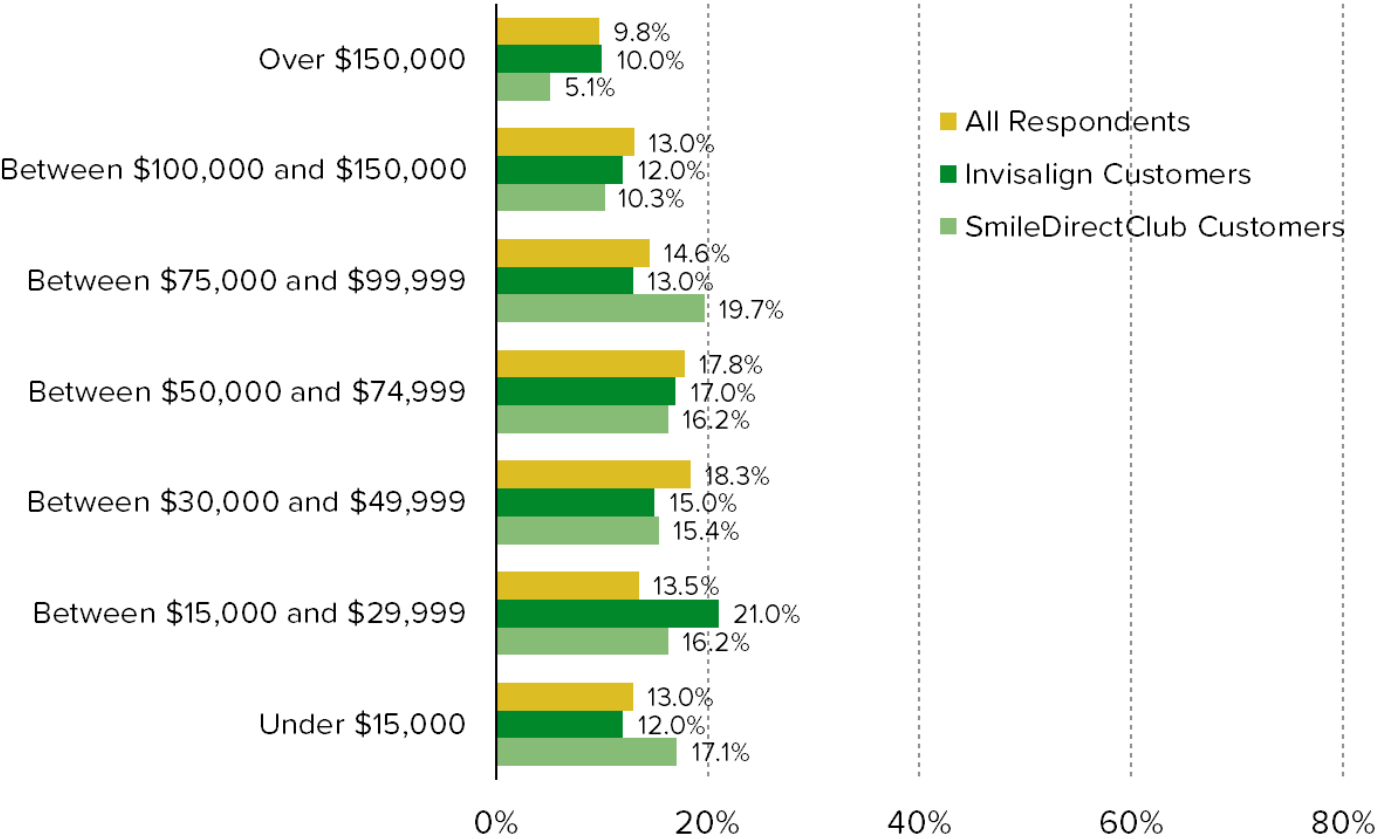
In what region of the country do you currently reside?

Posed to all respondents.



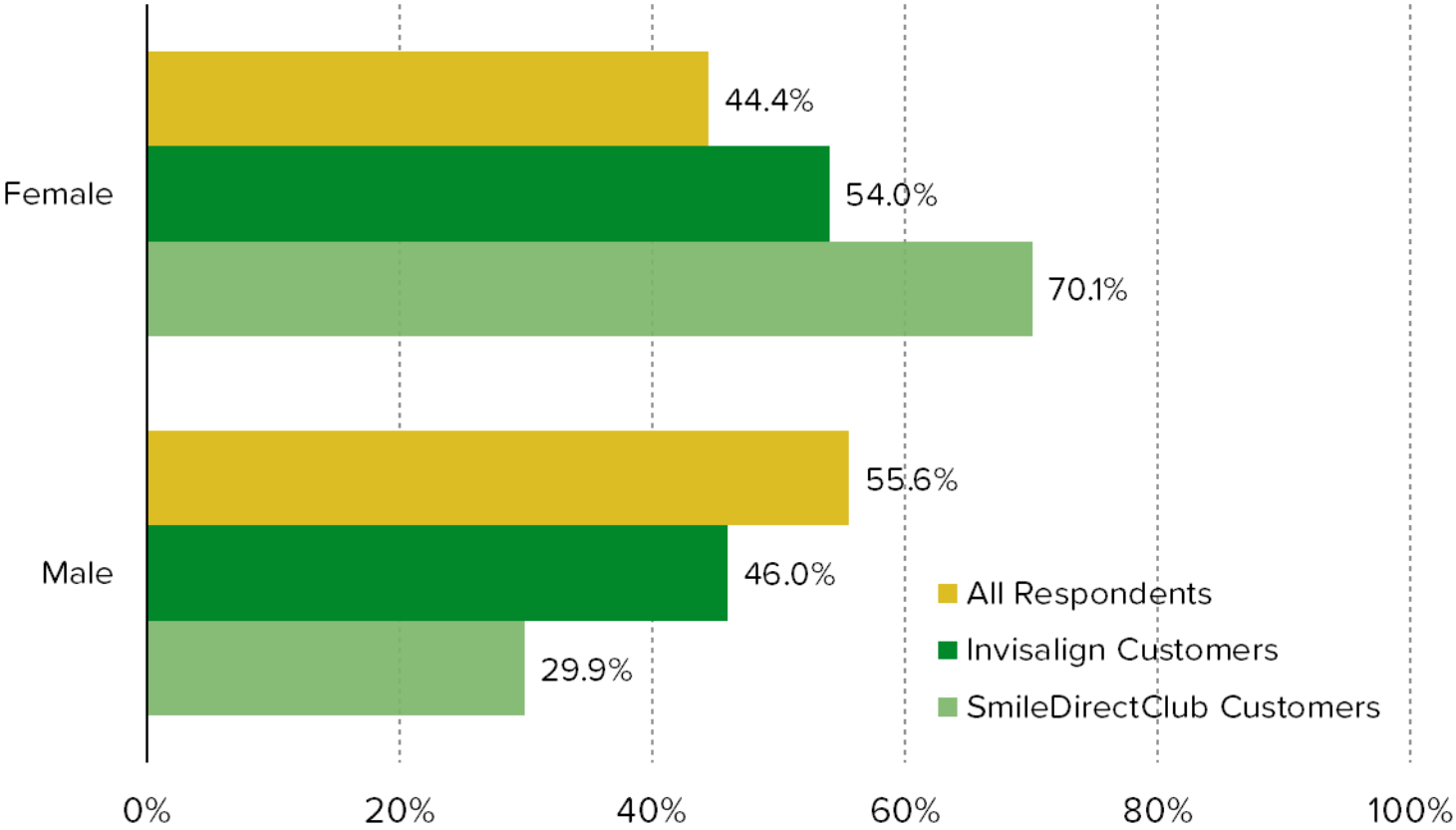
What is your annual household income?

Posed to all respondents.



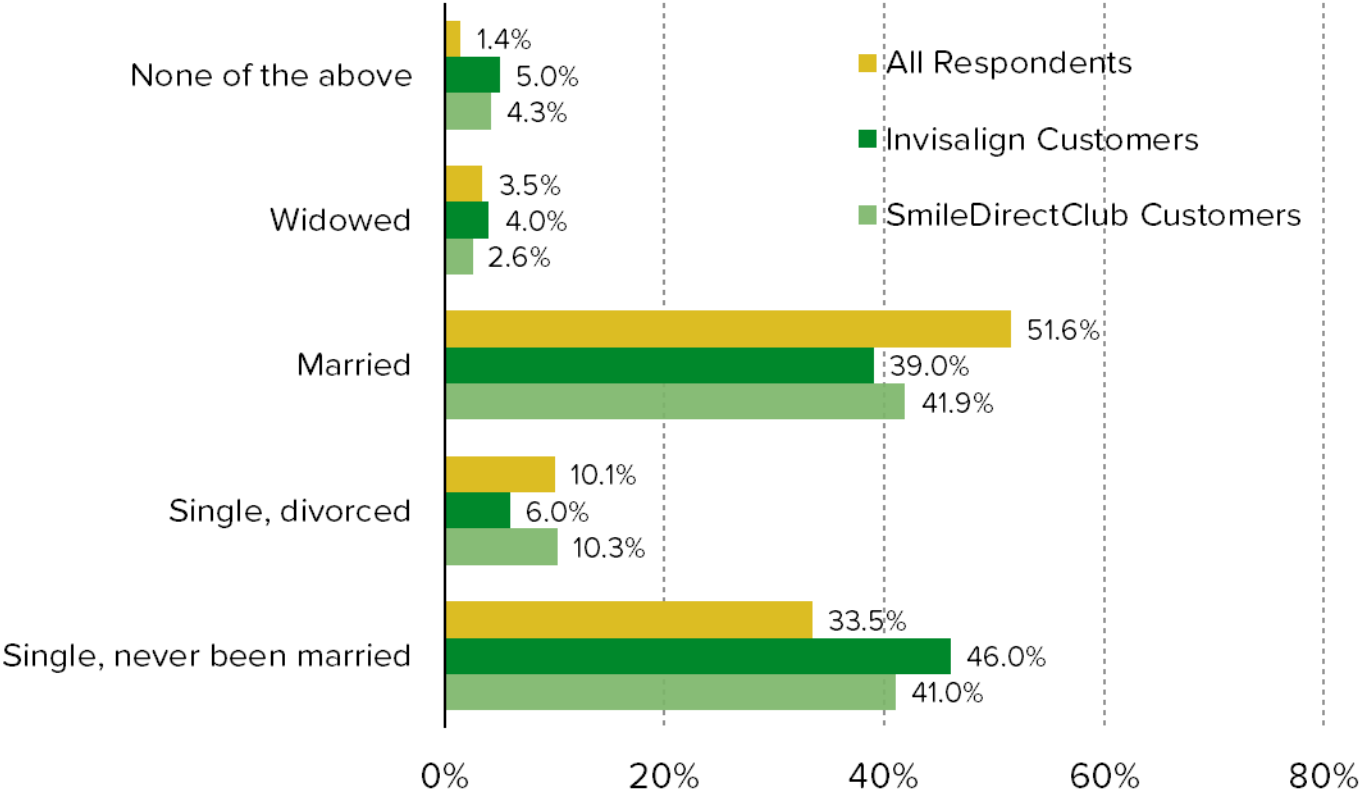
What is your gender?

Posed to all respondents.



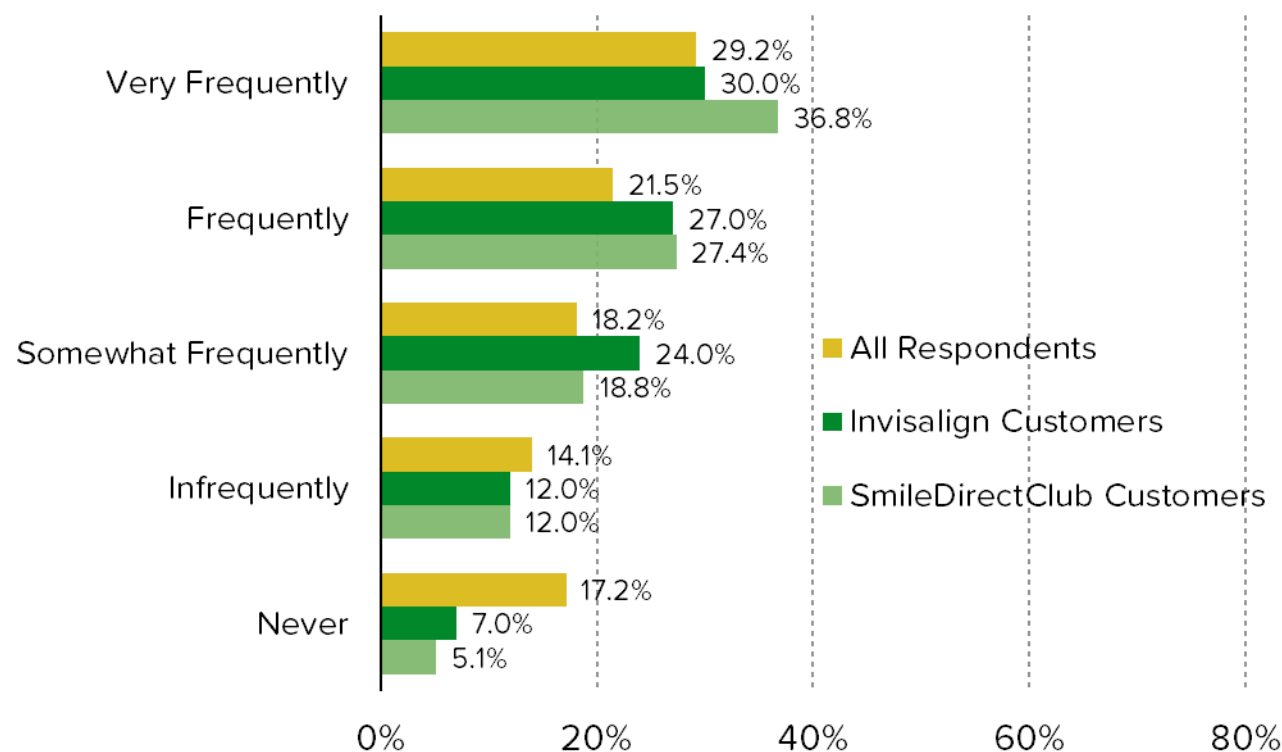
What is your marital status?

Posed to all respondents.



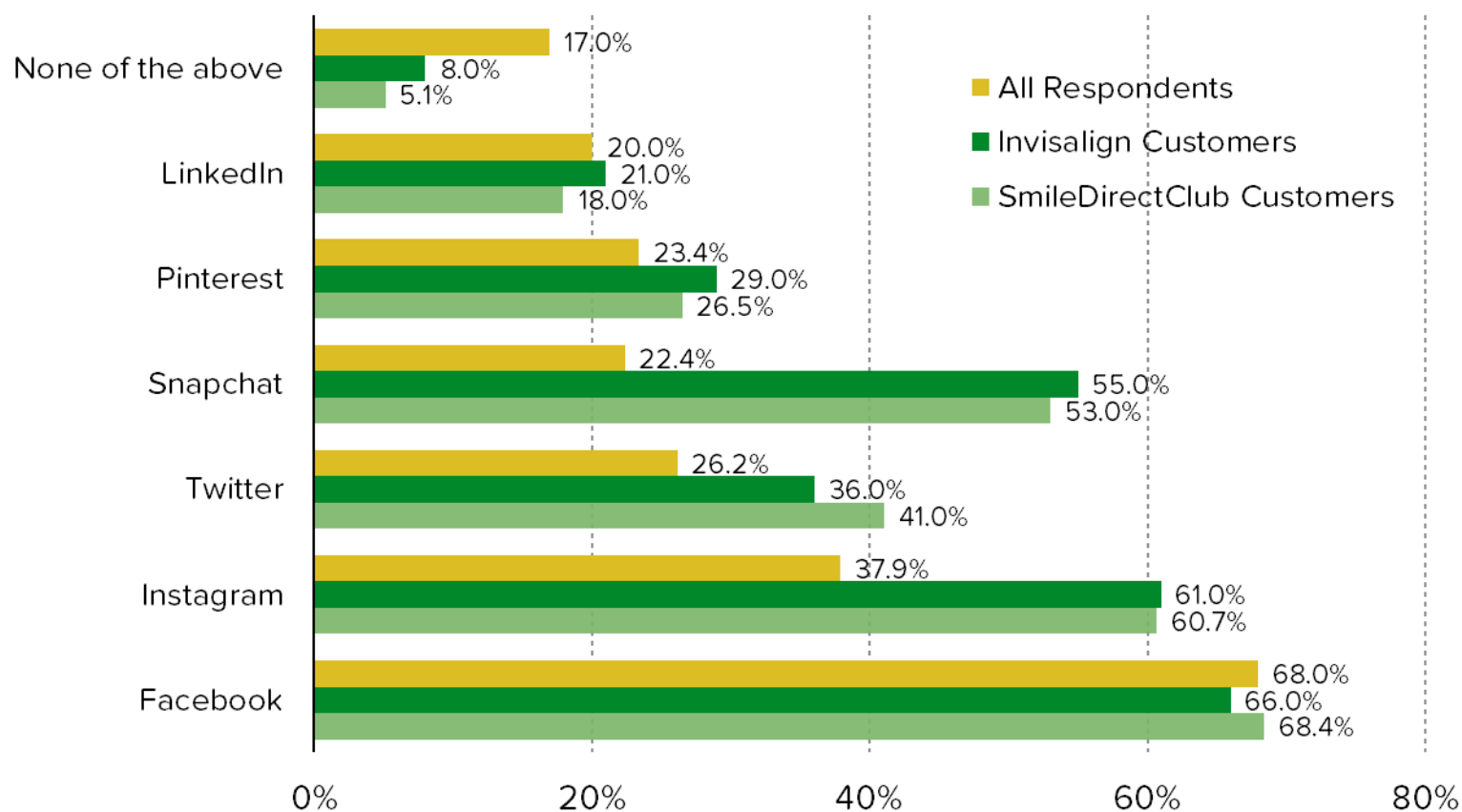
How often do you use social media websites/apps?

Posed to all respondents.



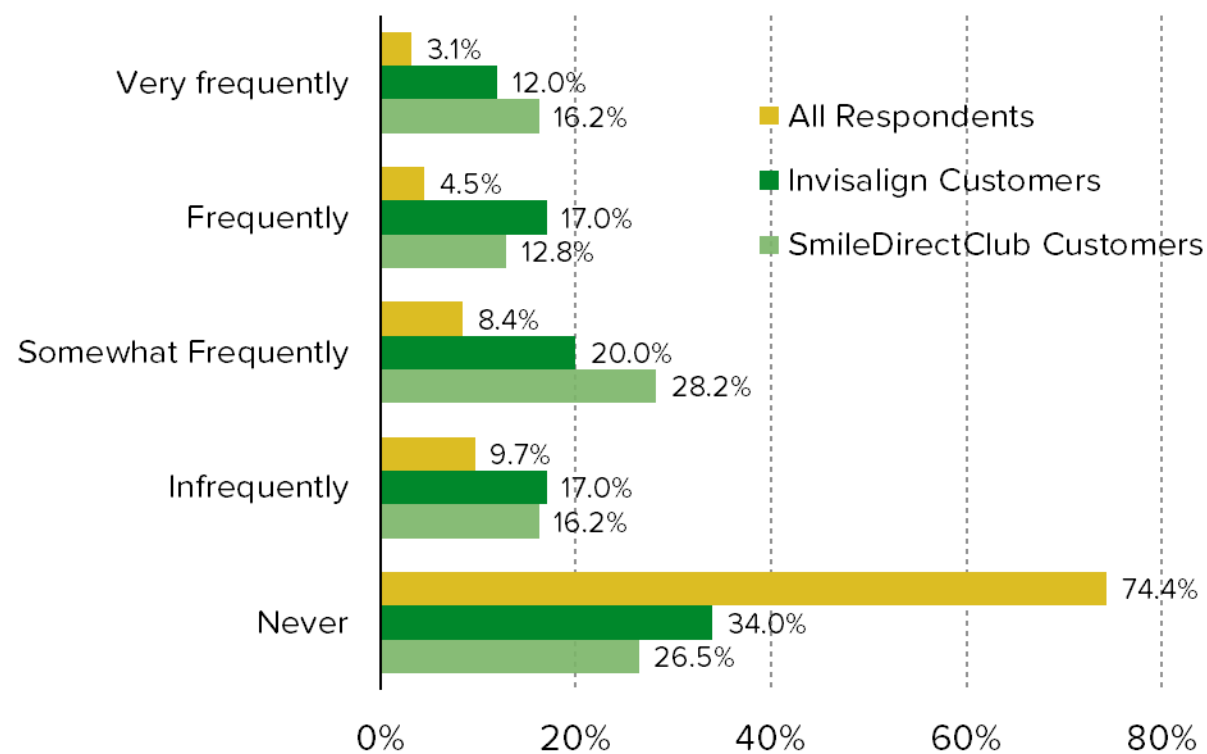
Which of the following do you use regularly or occasionally? (select ALL that apply)

Posed to all respondents.



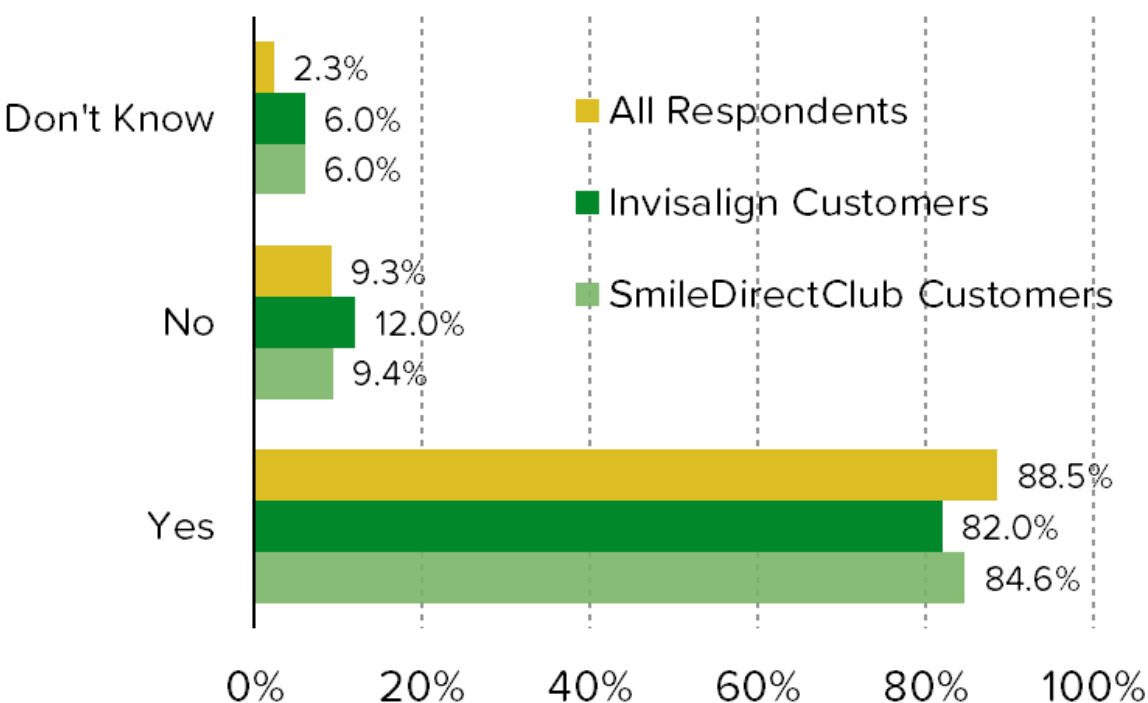
Do you ever use online dating services?

Posed to all respondents.



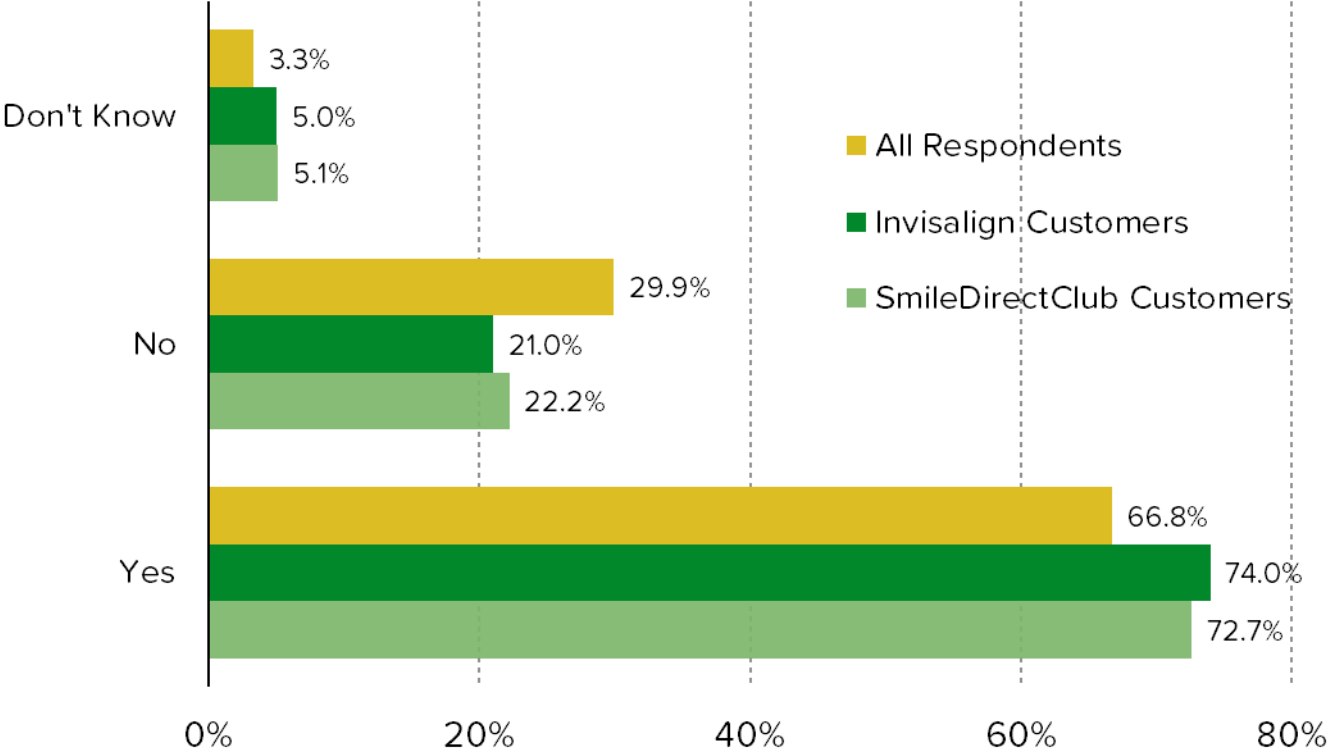
Do you have health insurance coverage?

Posed to all respondents.



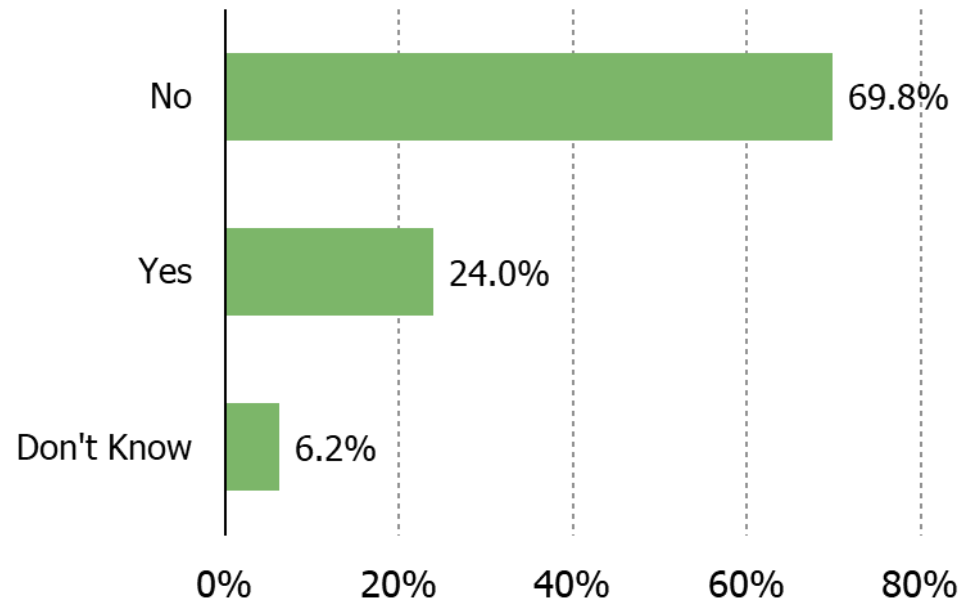
Do you have dental insurance coverage?

Posed to all respondents.



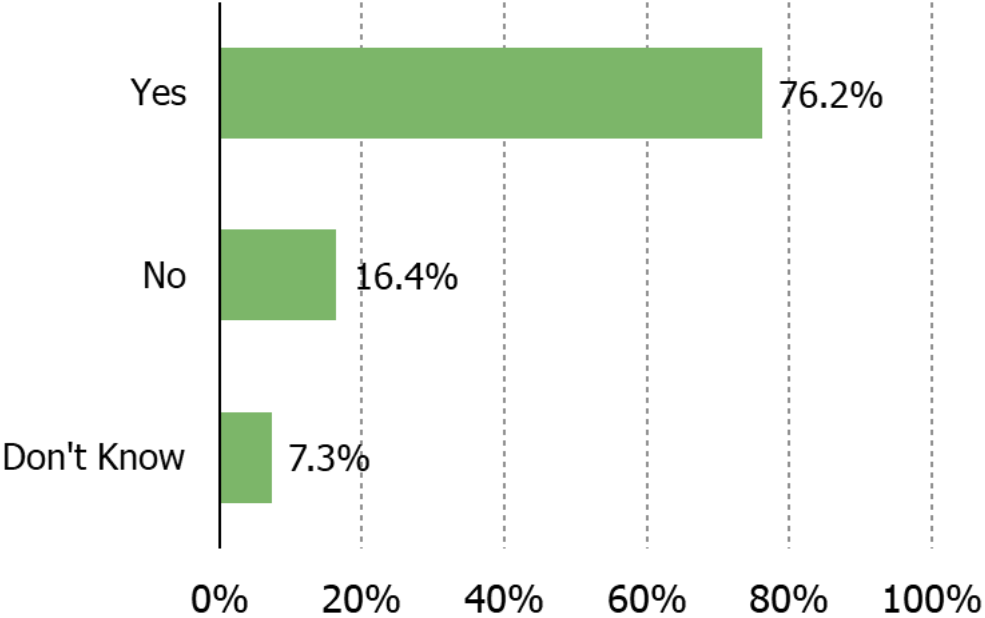
Do you have a health savings account (HSA)?

Posed to all respondents.



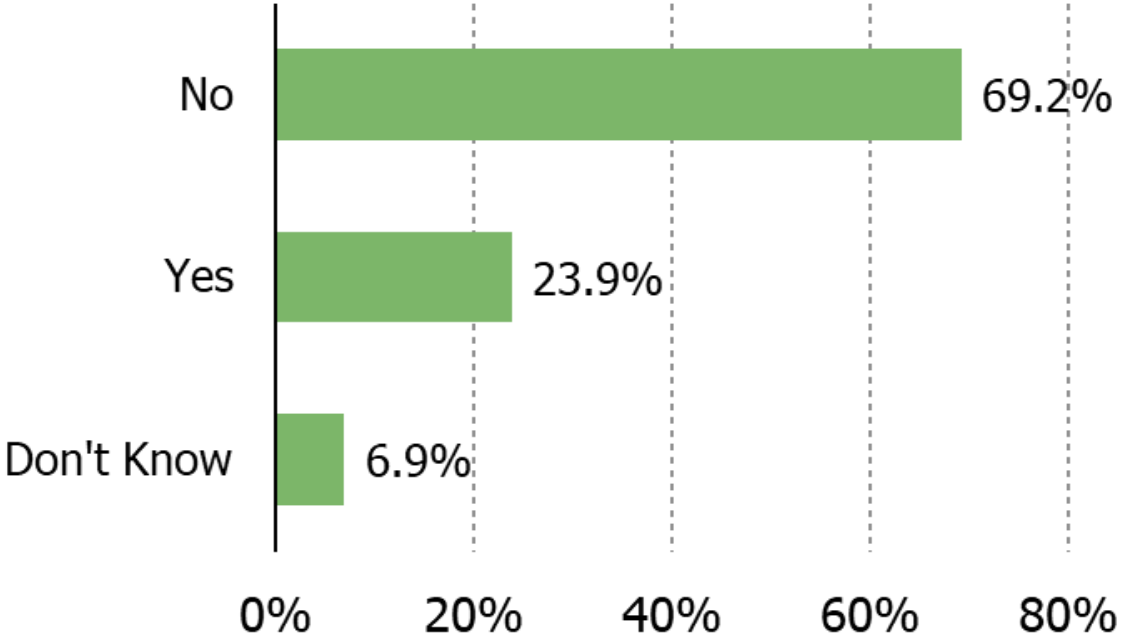
Is your health savings account (HSA) funded?

Posed to all respondents who have a HSA.



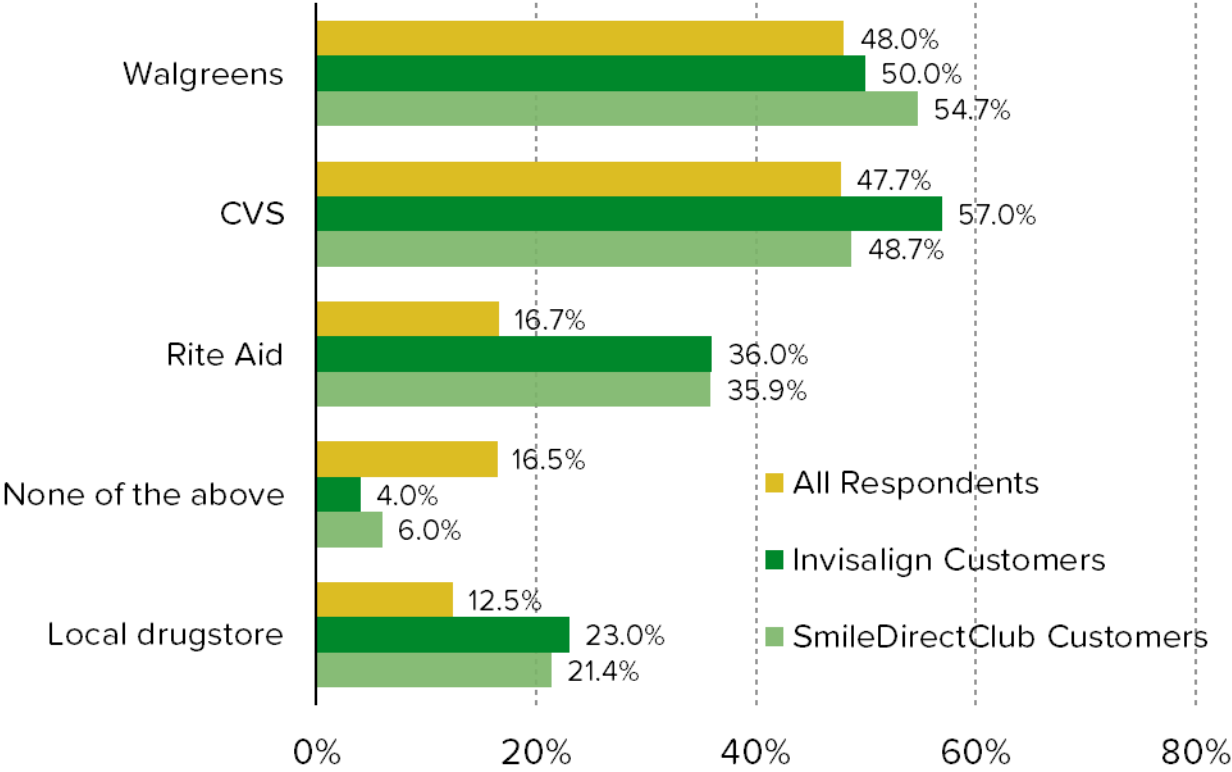
Do you have a flexible spending account?

Posed to all respondents.



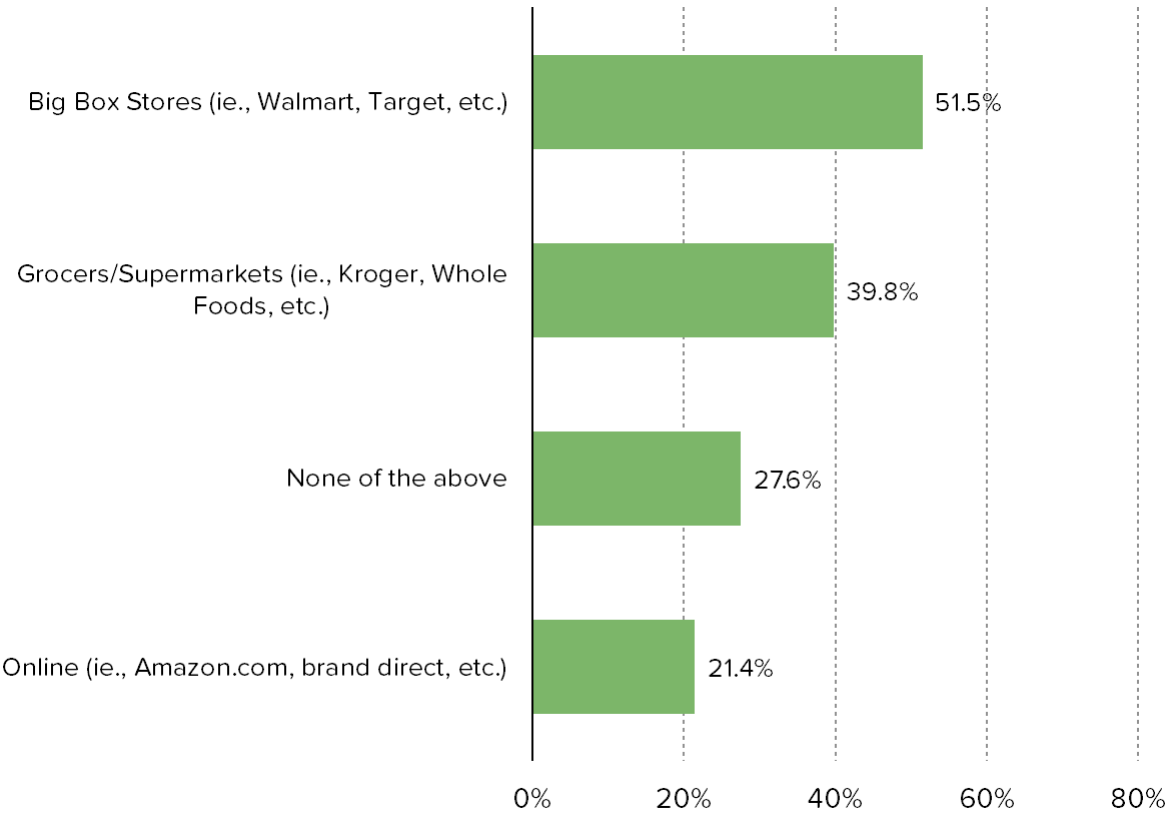
What drug stores do you regularly visit? (Select ALL that apply)

Posed to all respondents.



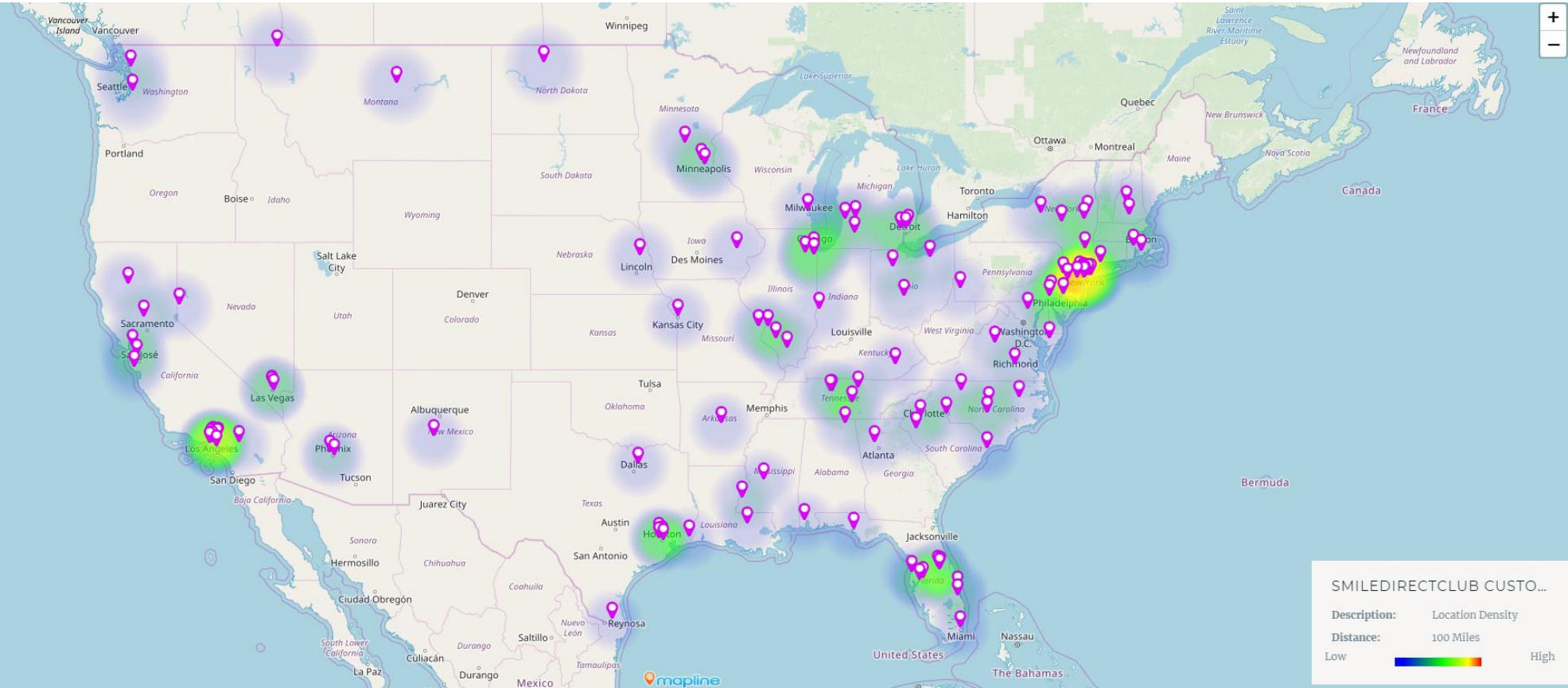
If you don't frequent drugstores, where do you typically shop for products?

Posed to all respondents who don't regularly frequent drug stores.



Clear Aligners Survey Results

SmileDirectClub Customers (Zip Code)



Clear Aligners Survey Results

Invisalign Customers (Zip Code)

