

Clear Orthodontic Aligners – United States

2019 Invisalign Outlook Moderates

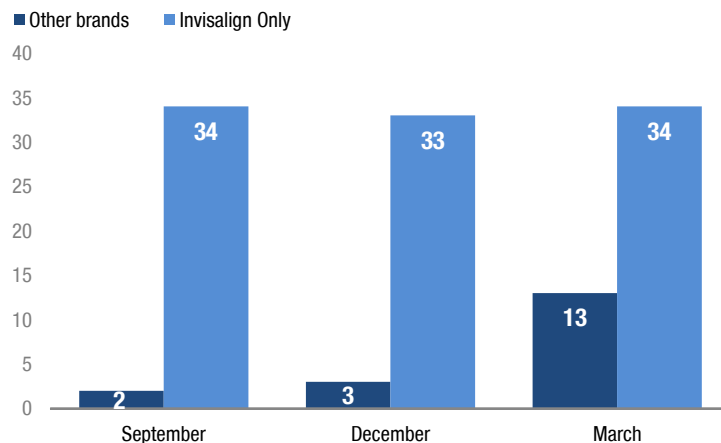
U.S. Invisalign providers' estimates for 2019 case starts have softened slightly since December because of growing competition from other aligner brands and other Invisalign providers.

- ALGN providers' 2019 case starts expected up 11%–16% yy (vs. December forecast of up 13%–18%); proportion of providers' teen cases using ALGN stable qq
- 13 of 47 providers offering competing aligner brands (vs. 3 of 36 in December), including 7 using competing aligners only in simple cases; 3 sources still satisfied with MMM
- ALGN discounting Express 5 aligners (used for simple cases); 5 sources increased their own discounting qq to compete with other ALGN providers
- Area to Watch: 17 of 29 providers neutral/mixed on ALGN store closures, but 8 positive because they perceive move as safeguarding provider margins, brand image

KEY DATA

Invisalign Providers Offering Competing Aligners

(number of mentions)



“Competition in the market is growing all the time, and [competitors] are advertising at a much lower price. These are obstacles to an increased Invisalign patient base.”

Treatment coordinator at U.S. orthodontic practice

BY SARA STAHL

SOURCES & BACKGROUND

47 U.S. providers of clear orthodontic aligners (45 Invisalign providers, 2 former Invisalign providers), comprising 28 orthodontic practices and 19 dental practices, representing nearly 5,000 Invisalign case starts in 2018

REPEAT SOURCES 20 from OTR Global's December report

INTERVIEWS Feb. 19 through March 8

AVERAGES Weighted where appropriate according to total Invisalign cases started in 2018

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Competition Weighs on 2019 Estimates

U.S. providers of **Align Technology Inc.**'s Invisalign expect their 2019 case starts to increase an average 11%–16% yy, moderating from OTR Global's December report growth forecast of 13%–18%. (Findings capture growth from providers who have been offering Invisalign for at least one year but do not capture growth from newly opened Invisalign practices.) Providers said Invisalign's brand reputation, advertising and benefits (such as aesthetics, efficacy and comfort) remain growth drivers. However, concerns about competition have jumped since OTR Global's December report and weighed on 2019 estimates. "The cost of corrections can be alarming to some patients. Competition in the market is growing all the time, and [competitors] are advertising at a much lower price. These are obstacles to an increased Invisalign patient base," said a treatment coordinator at an orthodontic practice.

Twelve of 47 sources said competition is affecting Invisalign demand (compared with two of 36 in December), including from brands as well as other Invisalign providers. "The cost of Invisalign is high compared to online companies like **SmileDirectClub [LLC]** and **Smilelove [LLC]**. We have noticed a drop in customer inquiries on Invisalign. When they do ask, they ask if SmileDirectClub is as good as Invisalign," said a dental practice treatment coordinator. A dental provider whose 2019 forecast had weakened during the past 90 days said, "Things are more competitive now with other Invisalign providers. It's so easy for a dentist to become an Invisalign provider, so a lot more are going that route, especially cosmetic dentists."

Sources said Invisalign's provider incentive program, which discounts lab fees based on six-month volume targets, has made it difficult for mid- and low-volume providers to compete. "Increased competition in our area has customers searching for the best prices. [Lower] treatment prices from other practices limit our Invisalign growth because we cannot reduce our pricing [enough to compete]," said a low-volume Invisalign provider.

Alternative Brands Creep In

Thirty-four of 47 sources offer only Invisalign as their aligner brand, and most are not open to alternative products. "We only want to be associated with Invisalign because it's widely seen as the best in the field. We trust Invisalign and believe in their technology — things like SmartTrack [aligner material] and ClinCheck [software]. For us, it's a matter of trust," an orthodontist said.

However, 13 of 47 sources have incorporated alternative brands into their practices, up from three and two of 36 sources in OTR Global's December and September reports, respectively. Of the 13, five low- to mid-volume providers are supplementing Invisalign with cheaper options. "Small providers can't get the same prices as large providers. We're not able to compete, so my only choice is to go with [an Invisalign] competitor. [**Straumann Holding AG**'s] ClearCorrect has a lab fee of \$700, compared with \$1,900 for Invisalign, and that gets into your head," an orthodontist said.

In addition, six providers whose Invisalign volumes place them in the platinum provider tier (the second highest of the six main categories) have supplemented their Invisalign business with alternative brands. "I have the capacity to do more Invisalign, but I don't have the capacity to get to the next [provider] level. The jump between the tiers is too [great], so I'll do enough Invisalign cases [in 2019] to make sure I stay a platinum provider, but anything over that, I'll use **3M [Co.]**," one said.

Two other dental providers have replaced Invisalign with ClearCorrect after Invisalign stopped accepting oral scans from competing scanners such as **3Shape A/S**'s Trios early last year. "We completely stopped offering Invisalign because they refused to accept our scans. We now offer ClearCorrect with very satisfactory results, and our patients are happy with the lower price point," one said.

"The cost of Invisalign is high compared to online companies like SmileDirectClub and Smilelove. We have noticed a drop in customer inquiries on Invisalign."

Dental practice treatment coordinator

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Alternatives Most Suitable for Simple Cases

Of the 13 providers offering alternative products, seven are using them only for simple orthodontic corrections, which are considered better suited to these brands than are complex corrections. “Any company can come out with clear aligners because the patents for clear aligners have expired. But Invisalign still has the patents on the SmartTrack material and the attachments, and that’s the main difference between Invisalign and every other clear aligner,” said an orthodontic practice administrator.

Allesee Orthodontic Appliances Inc.’s Simpli5, **Dentsply Sirona Inc.**’s MTM, **Protec Dental Laboratories Ltd.**’s Clearline and **Specialty Appliances Inc.**’s Clear Image are among the alternatives being used to treat simple cases, and two of the seven providers are manufacturing simple aligners in-house. “We are treating very easy cases with an in-house 3D printer program for correction aligners. These cases fall somewhere between a reset retainer and a full-blown Invisalign case, and they are going very well. We hope to bridge the gap in aligner treatment with something that is effective, hands-on and affordable,” one said.

Major Players Moving Deliberately

Ten of 47 sources said competing aligner brands have become more aggressive in pursuing business during the past 90 days, a slightly higher proportion than the five of 34 sources who reported this in December. Many specified SmileDirectClub as aggressive, although few reported aggressive activity from the large dental supply companies entering the aligner market such as 3M, **Dentsply Sirona Inc.** and **Henry Schein Inc.**, who are expected to be best positioned to compete against Invisalign for complex orthodontic cases. “I think they’re taking it slow. There’s nothing worse than a company coming out with a product and not having it do what it’s expected to do. I have not had any direct contact from Schein yet, and my 3M rep is not aggressively pushing it. Dentsply Sirona bought SureSmile, and they’re probably pushing it the most,” an orthodontist said. Another said, “I don’t think 3M has opened [its Clarity brand] to all orthodontists yet.”

3M Users Satisfied: All three orthodontic providers who were using or trialing 3M’s Clarity in December are satisfied with the brand. “We prefer to use 3M now, although we will continue to offer Invisalign to patients that request it. 3M is more comfortable for our patients, it costs us less, and our 3M rep is proactive and available whenever we have a question,” one said. Another said, “We’re still in sort of a beta stage with 3M. I’m offering it to about one in 10 patients. I was afraid Invisalign would have such a hold on people that they would only want to go with Invisalign, but what I’m starting to realize is they don’t care what you use as long as their teeth get straight.” The third provider is trialing 3M with one patient and said, “Everything is going well with our [3M] trial case — no complaints at all. If it ends with impressive results, as we expect it will, we’ll encourage patients to use 3M as our recommended option, although we’ll still offer Invisalign, too.”

Invisalign Discounts Quiet Except for Express 5

Most sources said Invisalign still is not offering discounts beyond its standard volume discounts for provider tiers. However, five said Invisalign has lowered the lab fee of its Express 5 aligners — used to treat simple cases — from \$435 to \$349 for single-arch treatment and from \$575 to \$399 for double-arch treatment through March 31. Sources said Express 5 is not a major product in Invisalign’s lineup because it targets minor tooth movement rather than complex cases, and they had mixed opinions about whether the Express 5 discount is in response to the multitude of simple aligner products hitting the market. “This price cut is probably due to competition with other aligner companies and the likes of

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Orthodontic provider

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SmileDirectClub,” an orthodontist said. On the other hand, the manager of an orthodontic practice said, “Invisalign has a discount for Express 5, but it’s a common discount they offer regularly.”

One orthodontist said the discount has him reconsidering his use of a competing brand to treat simple cases. “I use Clear Image aligners in cases with really minor issues. However, I have been thinking I should use Invisalign Express for these cases because [Invisalign Express 5] costs are now below or at least even with [Clear Image’s],” he said.

Pricing Structure Forces Some Provider Discounts

Sources’ Invisalign patients paid an average \$5,311 per case during the past 90 days, with high-volume providers generally charging less than mid- to small-volume providers. “We get good volume pricing from Invisalign. We pass those savings on to customers, so our fee for an 18-month run of Invisalign is \$4,200, and for 24 months it’s \$5,200,” a high-volume provider said. Overall, average per-case fees sources paid Align were stable during the past 90 days because most sources did not move up or down Invisalign provider tiers.

Most sources are still not offering their own Invisalign discounts or are discounting the product only mildly. However, five low- to mid-volume providers increased their Invisalign discounting during the past 90 days, and, in contrast to OTR Global’s 2018 research, this was in response to lower prices from other Invisalign providers. “No one is in a position where they can turn patients away. In the past, I was more rigid about not matching a competitor’s prices, but it’s harder and harder to do that. The market is getting bifurcated between large and small [Invisalign providers], and Invisalign created this beast,” a low-volume provider said. In addition, several sources said competition from other Invisalign providers has prompted them to increase their marketing and advertising spending. “It used to be word-of-mouth and dentist referrals that brought in patients, but we’ve had to include other forms of advertising — social media, community event sponsorships, billboards — because it is a different industry now. There is more competition,” an orthodontic provider said.

Teen Adoption Positive but Stable QQ

Fourteen of 26 orthodontic providers said teen Invisalign adoption is on the rise as Invisalign continues to chip away at parents’ concerns about kids wearing their aligners. “Little by little, parents are getting more comfortable letting their kids get Invisalign, or maybe kids are just getting more persuasive. Either way, more kids are getting Invisalign than last year,” one said.

On average, 37%–42% of orthodontic providers’ teen patients (including preteens) who started correction during the past 90 days were treated with Invisalign, similar to the December findings. Some sources said this is explained by seasonality. “The teen trend is increasing [yy], but there’s no notable change during the past 90 days. Summer will be the next season to note more substantial changes in the rate of teen Invisalign adoption,” one said. Still, just one source mentioned Invisalign’s new aligners for Class II corrections in teens and preteens as a potential growth driver, and one source said disappointing uptake of the product has reduced his 2019 Invisalign growth forecast. “We have a few Class II treatment cases, but for now, the majority of Class II patients prefer braces for cost and efficacy,” he said. Meanwhile, no source cited the new Invisalign First aligners for kids as a growth driver.

Scanner Purchases Continue

Similar to December, 34 of 44 providers own at least one Invisalign iTero scanner, including 14 who made an iTero purchase within the last year. Users reiterated that the scanners improve productiv-

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Low-volume provider

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ity and customer service. “We have had the iTero scanner for less than a year, and it has really helped reduce the time it takes for the staff to treat patients. It is a big factor in increasing our case starts,” said a dental treatment coordinator. A dental practice manager said, “We just purchased [an iTero] at the end of December. It lets [patients] see a simulation of what their teeth will look like at the end of treatment. That tends to get the patient excited about getting started with Invisalign.”

In line with December, four sources have plans to purchase an iTero within the next 12 months and two more have plans further out. Sources without iTero purchase plans cited recent purchases, the scanner’s high cost and limited enthusiasm for the two new iTero models launched earlier this year (one offers enhanced speed, the other enhanced portability).

New iTero 5D Scanner: One orthodontist expressed enthusiasm for Align’s new iTero Element 5D scanner, which was recently launched outside the United States. “It’s the same as the [previous-generation] iTero, but it has near-infrared imaging, which lets dentists detect cavities above the gum line without x-rays. That’s big news because 90%–95% of cavities are above the gum line. This will allow every dentist in the world to stop taking x-rays except for cases with really bad decay,” the source said and noted Dentsply Sirona and other dental suppliers of x-ray equipment could be hurt by the 5D.

Opinions on Invisalign Store Closures

Twenty-nine providers addressed Align’s March 5 announcement that it will close its 12 Invisalign stores because of the outcome of arbitration with SmileDirectClub. Eight sources responded to the news positively. “We were concerned about the retail stores because they changed the customer’s perception from Invisalign being a medical procedure to it being a process like LensCrafters, where it is really about selling a product,” an orthodontic treatment coordinator said. An orthodontist said, “I never thought the stores were going to help me. I figured all their [patient] referrals were going to go to larger-volume providers. If they helped one large provider in an area, they were likely to make another 25 providers angry because they weren’t getting referrals, so this might actually be good for Invisalign.” Four sources were disappointed by the store closure announcement. “I’m sorry to hear the retail stores are closing. We were open to [get] referrals from that structure,” a dental provider said.

Seventeen sources had neutral opinions, citing a mix of positive and negative factors. “I’d have to say my reaction is mixed. I think the storefronts had a positive role to play in raising the profile of the Invisalign brand, but the compensation they were offering providers was very unfair,” a high-volume orthodontic provider said. Other sources with neutral opinions were located too far from an Invisalign retail location to be affected.

A few providers expressed negative opinions about Invisalign’s plans to create doctor-owned Invisalign Experience branded practices, which have not been derailed by the SmileDirectClub arbitration. “I’m negative on this franchising thing because [branded practices’] price point will be lower than mine, and they’ll get free advertising. If someone down the street from me were doing it, that would affect me,” one said.

Contributors: Elise Arena, Belinda Bynum, Matthew Clinton, Jennine Fellmer, Jody Goldman, Kimi Green, Kenneth Hardin, Wallace Moody, Nicole Romero and Jason Tremble

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Orthodontist

Reactions to Announced Closure of Invisalign Stores

(number of sources)

Positive	8
Neutral/Mixed	17
Negative	4

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ON DEMAND

“People don’t want to wear braces anymore, and Invisalign has very strong brand recognition. People come in and ask for it.”

“Invisalign has a huge advantage over braces with oral hygiene. That’s almost as important a factor as appearance when it comes to patients deciding which treatment is the best fit for them, especially for teens.”

“I am not sure we will see a large increase in case starts this year because of competition from [Invisalign] dentists and companies offering clear corrections on the internet.”

“This year has been slower than I thought, but I just hired a marketing coordinator to help.”

“Teen usage is increasing at a very slow pace. Compliance and lost trays are still major obstacles.”

“I’m interested in Invisalign First [for kids], but you have to time it perfectly. If [the child] already has a couple of loose teeth, you have to do new scans when the new teeth come in. I haven’t found much use for it yet.”

ON COMPETITION

“We are receiving a lot of catalogs and inquiries regarding other products, but we are clear Invisalign has been a highly effective treatment for our patients and we are not planning to change treatment protocol any time soon.”

“We invested in an iTero scanner and will not look elsewhere for clear aligner products. We are locked into Invisalign. That is the idea of the scanner — to create exclusive loyalty to their brand.”

“ClearCorrect is a lot cheaper than Invisalign, but we’ve had really good experience with Invisalign, so why change?”

“Since Invisalign’s patents have expired, everyone is suddenly raring to go with their version of aligners.”

“Competition in the clear orthodontics market is constantly growing. They cannot reinvent the process, so pricing is the only way to get new business.”

“Someone recommended MTM, so we checked into it. It costs less than Invisalign. We are more open to hearing about other clear aligner brands because we have to be able to compete with pricing.”

“My thoughts have changed. If another company came around with a lower price point, now I’d be tempted to try it. With the cheap lab fees the big [Invisalign providers] get, it’s not worth my while to do cases at prices that compete with theirs.”

“We just started using a product called Clearline, but just for minor adjustments.”

“Other Invisalign providers are our biggest competition. Some do a lot of cases, so they get big discounts and can charge less.”

“We are getting a lot more competition in the area. There is a dental practice within 30 minutes that has 10 dentists that offer Invisalign, so we will now match any discount they offer.”

“Dentists are sucking away all our Invisalign. They are doing a ton of it.” *Orthodontist*

“[Invisalign’s] patent on ClinCheck is the one everyone is waiting for to expire because it makes a huge difference for treatment planning. Everyone is chomping at the bit to roll out software similar to ClinCheck.”

ON PRICES

“We only get a volume discount from Invisalign.”

“[Invisalign] is offering some discounts for some cases. For the Invisalign Express 5, they are offering single-arch lab fees for \$349 and \$399 for double arch.”

“[Invisalign] mostly discounts based on the tier level, which is determined by the number of cases you submit, but I’m thinking [they’re offering the Express 5 discount] because they are feeling some price pressure from newly available aligner providers. In my opinion, competition is always a good thing.”

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“We never have discounted Invisalign, and we never will. Invisalign costs us enough that if we are going to make any money, we can't discount our prices.”

“We have advertised an Invisalign day at a reduced price to get a boost to our case starts.”

“It seems like 3M is trying to be 10%–15% cheaper than Invisalign.”

“[Dentsply Sirona's] SureSmile is a lot more work for the doctor than Invisalign, but the lab fee is \$1,000 max, so you can do a case for \$3,500–\$3,900 and justify it.”

“We charge patients the same amount for ClearCorrect as we did for Invisalign, but our cost is less.”

ON SCANNERS

“I broke down and got an iTero scanner. I didn't want to be the last orthodontist to do impressions, and it really has made a difference to be able to do scans quickly with little setup.”

“We last purchased [an iTero] scanner over two years ago. We looked at purchasing another one, but there was really not enough difference with the last model to justify the cost.”

ON INVISALIGN STORE CLOSURES

“Wow, unexpected news.”

“I'm glad Invisalign is closing their retail stores. I always thought they were a bad idea and confusing for patients. There was a lot of misperception out there about what services were provided by the retail stores. Patients thought they were basically the same thing as SmileDirectClub [stores].”

“We were not affected by the retail store closures for April 2019, but overall we agree it is a better move to build on the medical technology and state-of-the-art treatment reputation of Invisalign rather than become a strip mall competitor with SmileDirectClub.”

“Although we think it is better for Invisalign to close its retail stores, we are not convinced it will last because Invisalign will need to compete with other brands that already exist in the retail market space.”

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1. Approximately how many total Invisalign cases did your practice start during 2018?

	ORTHODONTISTS	GP DENTISTS	TOTAL
451–500:	2	-	2
401–450:	1	-	1
151–200:	5	-	5
101–150:	9	1	10
51–100:	5	6	11
1–50:	6	10	16
0:	-	2	2
Total:	4,072	882	4,954

2. How many years have you been offering clear orthodontic aligners from Invisalign?

	ORTHODONTISTS	GP DENTISTS	TOTAL
19–20:	3	-	3
17–18:	3	-	3
15–16:	3	-	3
13–14:	1	1	2
11–12:	2	-	2
9–10:	5	3	8
7–8:	4	3	7
5–6:	3	7	10
3–4:	2	2	4
1–2:	2	2	4
Don't know:	-	1	1
Average:	10.8 years	6.5 years	9.1 years

3. What factors are influencing demand for Invisalign aligners?

POSITIVE

	ORTHODONTISTS	GP DENTISTS	TOTAL
Appearance:	21	15	36
Brand reputation:	9	8	17
Advertising:	10	2	12
Efficacy:	10	2	12
Comfort:	7	3	10
Dental health/hygiene:	6	3	9
Easy to use:	3	6	9
Fewer/shorter patient visits:	4	2	6
No food restrictions:	5	1	6
Removable:	3	2	5
Cost:	1	1	2
Ease of use for provider:	2	-	2
Other:	1	2	3

NEGATIVE

	ORTHODONTISTS	GP DENTISTS	TOTAL
Compliance:	17	6	23
Cost:	12	11	23
Competition:	4	8	12
Not for difficult cases:	7	4	11
Insurance coverage:	2	2	4
Colored braces preferred:	3	-	3
iTero scanner incompatible:	-	2	2
Other:	2	2	4

Note: Some sources gave more than one answer while others did not respond.

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4a. Do you expect your 2019 Invisalign case starts to increase, remain the same or decrease yy?

	ORTHODONTISTS	GP DENTISTS	TOTAL
Up 101% or more:	-	1*	1
Up 91%–100%:	-	1*	1
Up 41%–50%:	-	1	1
Up 31%–40%:	3	1	4
Up 26%–30%:	1	-	1
Up 21%–25%:	2	-	2
Up 16%–20%:	2	2	4
Up 11%–15%:	3	1	4
Up 6%–10%:	7	3	10
Up 1%–5%:	3	2	5
Flat:	5	3	8
Down 1%–5%:	1	-	1
Down 16%–20%:	-	1	1
Down 21%–25%:	-	1	1
Down 81%–90%:	1*	-	1
Not applicable:	-	2	2
Weighted average:	Up 13%–18%	Up 2%–7%	Up 11%–16%
December average:	Up 13%–18%	Not averaged	Up 13%–18%

*Three outliers excluded from averages

4b. Has your outlook on 2019 Invisalign case starts improved, remained the same or worsened during the past 90 days?

Improved:	7	10	17
Remained the same:	15	4	19
Worsened:	6	3	9
Not applicable:	-	2	2

5a. What clear orthodontic aligner brands do you offer in addition to Invisalign?

3M:	3*	-	3
ClearCorrect:	1	2**	3
Dentsply Sirona's MTM:	-	2†	2
In-house brand:	2	-	2
AOA Simpli5:	-	1	1
Dentsply Sirona's SureSmile:1	-	1	1
Protec Dental:	1	-	1
Specialty Appliances:	1	-	1
No other brands:	20	14	34

Note: One source gave more than one answer.

* One source offering 3M is still trialing the product.

**Two sources offering ClearCorrect stopped using Invisalign in early 2018.

†One of two sources offering Dentsply Sirona's MTM plans to discontinue the product.

5b. Are you more or less open to offering other aligner brands than you were 90 days ago?

More:	3	3	6
No change:	24	14	38
Less:	1	2	3

6. Have competing aligner brands become more or less aggressive in pursuing business during the past 90 days?

More:	8	2	10
Same:	20	15	35
Less:	-	2	2

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7. As an Invisalign provider, what is your main source of competition?

	ORTHODONTISTS	GP DENTISTS	TOTAL
Other Invisalign providers:	22	13	35
SmileDirectClub:	4	2	6
3M:	1	-	1
No one:	-	2	2
Don't know:	1	-	1
Not applicable:	-	2	2

8. Has the average per-case price you pay Align increased, remained the same or decreased during the past 90 days?

Increased:	3	1	4
Remained the same:	19	14	33
Decreased:	4	2	6
No response:	2	-	2
Not applicable:	-	2	2

9. Is Invisalign offering discounts (beyond its standard volume discounts for provider tiers)?

Yes:	6	1	7*
No:	22	16	38
Not applicable:	-	2	2

* Five sources cited a discount on Invisalign's Express 5 aligners for minor tooth movement.

10a. Is your practice offering its own Invisalign discounts or promotions?

Yes:	8	4	12
No:	20	13	33
Not applicable:	-	2	2

Note: Some sources gave more than one answer.

10b. Is your practice discounting Invisalign more, the same or less than 90 days ago?

More:	3	2	5
Same:	25	13	38
Less:	-	2	2
Not applicable:	-	2	2

Note: Some sources gave more than one answer while others did not respond.

11. Among your Invisalign case starts during the past 90 days, what is the average price your patients pay after any discounts?

\$7,000–\$7,999:	1	-	1
\$6,000–\$6,999:	4	2	6
\$5,000–\$5,999:	18	9	27
\$4,500–\$4,999:	3	2	5
\$4,000–\$4,499:	-	2	2
\$3,500–\$3,999:	-	1	1
Don't know:	1	-	1
No response:	1	1	2
Not applicable:	-	2	2
Average:	\$5,499	\$5,006	\$5,311

12. What is your reaction to the announced closure of the Invisalign stores?

Positive:	6	2	8
Neutral:	8	9	17
Negative:	3	1	4
No response:	11	7	18*

* Interviewed prior to the March 5 announcement Invisalign will be closing its stores.

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13. When did your practice purchase its last iTero scanner? When do you expect your practice to purchase its next iTero scanner?

LAST ITERO PURCHASE	ORTHODONTISTS	GP DENTISTS	TOTAL
3 years ago or more:	4	1	5
Less than 3 years ago:	5	1	6
Less than 2 years ago:	5	3	8
Less than 12 months ago:	6	3	9
Less than 6 months ago:	2	1	3
Less than 3 months ago:	1	1	2
Have not purchased:	2	8	10
Don't know:	1	-	1
No response:	2	1	3
NEXT ITERO PURCHASE			
Next 30 days:	1	-	1
Next 6 months:	1	-	1
Next 12 months:	2	-	2
Beyond 12 months:	2	-	2
Not on horizon:	19	15	34
Never:	-	3	3
No response:	2	1	3
Don't know:	1	-	1

Orthodontists

14. What percentage of your teen patients (including preteens) who started orthodontic correction during the past three months was treated with Invisalign?

71%–80%:	3
51%–60%:	4
41%–50%:	2
31%–40%:	3
26%–30%:	2
21%–25%:	1
16%–20%:	3
11%–15%:	1
6%–10%:	1
1%–5%:	3
Less than 1%:	1
0%:	2
No response:	1
Not applicable:	1
Weighted average:	37%–42%
December average:	39%–44%

15. Is Invisalign adoption by teens (including preteens) increasing, remaining the same or decreasing at your practice?

Increasing:	14
Remaining the same:	10
Decreasing:	2
No response:	1
Not applicable:	1

Clear Orthodontic Aligners – United States

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