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Healthcare



Recent/Current Healthcare Case Study: Invisalign U.S.

- 100 U.S. orthodontists and general dentists who use orthodontic treatment solutions
- Roughly quarterly to semi-annual deployment schedule (began Nov '17)
- Key takeaways
 - In terms of clear aligners, Invisalign continues to dominate all other brands, i.e., the largest majority of dentists and orthodontists still regularly use Invisalign
 - ClearCorrect is a distant second option
 - Multiple direct-to-consumer (DTC) brands have entered the space including SmileDirectClub, Candid and SmileLove
 - Most of and an increasing number of dentists/orthodontists view DTC options as a different market segment and a majority of them report no impact to their orthodontic case volumes or pricing as a result of DTC brands.