
The Invisalign *It Starts with a Smile* National Survey

Prepared For:

Invisalign

Prepared By:

Harris Poll

INVISILIGN SURVEY: Research Method and Note about the Report

Research Method

This survey was conducted online by Harris Poll on behalf of Invisalign between March 28-30, 2016, among 2,008 adults ages 18+ in the U.S.

Results were weighted for age within gender, region, race/ethnicity, income, and education where necessary to align them with their actual proportions in the population. Propensity score weighting was also used to adjust for respondents' propensity to be online.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, Harris Poll avoids the words "margin of error" as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100% response rates. These are only theoretical because no published polls come close to this ideal.

Respondents for this survey were selected from among those who have agreed to participate in Harris Poll surveys. The data have been weighted to reflect the composition of U.S. adults. Because the sample is based on those who agreed to participate in the Harris Poll panel, no estimates of theoretical sampling error can be calculated.

A Note about Reading the Report

The percentage of respondents has been included for each item.

- An asterisk (*) signifies a value of less than one-half percent.
- A dash represents a value of zero.
- Percentages may not always add up to 100% because of computer rounding or the acceptance of multiple responses.

How to Read Data Tables: Key Terms & Statistical Significance Testing

Tab(s) or Cross-tab(s): This is short for cross-tabulations, or data tables. Raw survey data are tabulated to depict the results based on aggregate groups of respondents, typically, the “Total” sample, as well as subgroups that can be compared against one another to see if there are statistically significant differences among them (e.g., men vs. women).

Banner: A banner is essentially a set of cross-tabs.

Banner point: A banner point is a column in the data tables – a single banner, or page of cross-tabs, can typically include about 20 columns, or banner points (depends partly on the banner point titles/labels). Banner points enable us to compare two or more groups to one another to see if there are statistically significant differences among them (e.g., the data for “men” would be contained in one banner point and “women” in another, with the two columns stat-tested against one another to determine if the differences are statistically significant).

Statistical significance testing: Two or more banner points can be tested for significant differences based on a statistical formula called a t-test – whether or not a difference between 2 or more groups is significant depends not only on the magnitude of the difference, but also on the sizes of the samples being compared (i.e., the smaller the samples, the larger a difference would have to be in order to be considered statistically significant).

Significance testing is done at the 95% confidence level, and the test is performed on percentages as well as means. Each subgroup is contained in a banner point and assigned a letter. When the percentage of one subgroup is significantly different from the percentage of another subgroup, the letter representing one of the two samples appears next to the percentage (or mean) of the other sample.

For example, the proportion of males answering “yes” to a particular question may be compared to the percentage of females answering “yes” to the same question, as follows:

- In the table below, the male sample is assigned the letter B and the female sample is assigned the letter C.
- 67% of women said “yes” – a proportion that is significantly greater than the 57% of males who said “yes.”
- To indicate that women are significantly more likely to say “yes” than are men, the letter B (i.e., the letter assigned to the male subgroup) appears next to the “67%” in the female column.
- Similarly, the 37% of men who said “no” is significantly greater than the 29% of women who said “no,” so the letter C (i.e., the letter assigned to the female subgroup) appears next to the “37%” in the male column.
- It is these letters that indicate statistically significant differences among two or more subgroups – if there are no letters next to a percentage, then the differences are not statistically significant and may not be described as true differences in attitude or behavior among subgroups.

	Gender		
	Total	Male	Female
	(A)	(B)	(C)
Unweighted Total	977	488	489
Weighted Total	967	464	503
Yes	611 63%	274 57%	337 67%B
No	319 33%	171 37%C	148 29%
Don't Know	37 4%	18 4%	19 4%

IMPACT OF CONFIDENCE

Confidence Matters – for Appearance, Success and Especially Happiness

Stating the obvious, feeling confident is a good thing. According to the majority of Americans, on their more confident days, others view them more positively as generally happier people – and for about 4 in 10 U.S. adults, as more successful, smarter and more attractive. But, confidence not only impacts how others perceive them, but also how they see themselves. Over 1 in 3 Americans say that (lack of) confidence often serves as a barrier and holds them back from participating in important life events and activities.

- When U.S. adults feel confident, many say people perceive them as:
 - Happier (63%)
 - More attractive (44%)
 - More successful (43%)
 - Smarter (40%)
- Nearly 4 in 10 Americans (36%) say lack of confidence often holds them back from participating in important life activities (e.g., weddings, public speaking).

IMPACT OF PHYSICAL APPEARANCE

Insecurity about Appearance Abates Slightly with Age – but Less for Teeth than other Traits

As most adults age, their feelings of security about more cerebral or emotional traits (like personality, intelligence and sense of humor) grow. But for physical characteristics, especially weight and teeth, the majority of those who were insecure as teenagers remain self-conscious as grown-ups. Right now, nearly every adult who wants to make an improvement to their physical appearance is primarily driven by their health, but also have a desire to recapture their youth, look good for a certain event, or please another person. And, 7 in 10 adults believe that making even one improvement to their physical appearance would be enough to boost their confidence.

- Many Americans admit they were insecure about the following characteristics as a teenager and are still insecure about them now:

Trait	Insecure (as a Teenager)	Insecure (Today, of Those Insecure as a Teenager)
	%	%
Weight	39	60
Teeth	23	57
Personality	25	35
Nose	14	50
Intelligence	15	42
Height	17	27
Sense of Humor	7	40
Nothing	21	40

- Something motivates nearly all U.S. adults (91%) to make an improvement to their physical appearance, including:
 - Maintaining their health (66%)
 - Desire to have more confidence (38%)
 - Pleasing someone else (e.g., life partner/spouse) (34%)
 - A special event/moment in life (e.g., wedding, reunion) (28%)
 - Desire to look younger (28%)

- Seven in 10 Americans (70%) believe that making one simple improvement in their appearance would boost their confidence.

CURRENT STATE OF TEETH

Straight Teeth are a Priority – but not a Reality

More than 8 in 10 U.S. adults recognize at least some value in having straight teeth – and about 4 in 10 emphasize it strongly. That said, only a minority of adults (1 in 5) say that in actuality their teeth are completely straight, and only about one-quarter feel very satisfied with how their teeth look and feel right now. Around the same proportion (one-quarter) are not very or not at all satisfied.

A majority of U.S. adults currently have at least one tooth problem, primarily missing teeth, crooked teeth or issues with their bite. Younger and more affluent adults are more likely than their peers to experience bite problems in particular. Today, teeth is the #2 trait, behind only weight, about which Americans continue to feel insecure, far surpassing other physical and personal characteristics like nose, personality and height. In fact, more than half of those who were self-conscious about their teeth as teenagers still worry about their teeth today.

- More than 8 in 10 adults (82%) value having straight teeth at least somewhat. Over 4 in 10 value straight teeth very much.
- The majority of U.S. adults (64%) say their teeth currently have at least some problems, predominantly missing teeth, crooked teeth or bite problems.
 - 8 in 10 (80%) of U.S. adults, especially women and those ages 18-34, say their teeth are *not* completely straight.
- Certain demographic groups are more likely to express specific struggles with their teeth, for example:
 - 45+ year olds; those with HHI less than \$50K; and men are most likely to have *missing teeth*.
 - Northeasterners and those with \$100K+ are more likely to have *veneers*.
 - 18-44 year olds and those with HHI \$100K+ are more likely to say they have *bite problems*.
 - And not surprisingly older adults ages 55+ are more likely to have *dentures or implants*.
- Currently, only about one-quarter of U.S. adults (28%) are very satisfied with their teeth.
 - Around the same proportion (26%) or 60 million U.S. adults¹ are not very or not at all satisfied. Among those who don't have completely straight teeth, nearly a third (31%) are not very or not at all satisfied.

¹ 234,564,071 US adults according to 2010 census multiplied by 26% who are not at all or not very satisfied with teeth=60,986,658.46

- Of those who were insecure about certain traits as teenager, most (57%) remain insecure about their teeth today, more so than for other characteristics except weight, for example:
 - Weight (60%)
 - Nose (50%)
 - Intelligence (42%)
 - Sense of humor (40%)
 - Personality (35%)
 - Height (27%)

BENEFITS OF STRAIGHT TEETH

Impact of Straight Teeth Goes Well Beyond Appearance to Career, Health and Self-Esteem

More than 4 in 10 Americans (and far more, breaking a majority, of those ages 18-34 and 35-44) feel straighter teeth would positively impact their confidence. Of those who have actually had teeth straightening or braces as a grown-up, nearly everyone says straight teeth are crucial to confidence.

Moreover, Americans (especially those who have had their teeth straightened as an adult) cite many other benefits to straight teeth, beyond confidence. Most of this “experienced” cohort reinforces the importance of straight teeth for appearance, well-being, health and career, and three-quarters can personally attest to the positive influence that teeth straightening has had on their life. An overwhelming majority (almost 9 in 10) specifically mentions their straighter teeth causing them to feel more attractive and happier and giving them higher self-esteem. Nearly 8 in 10 say it’s one of the most important treatments they have ever done for themselves – and has granted them the courage to do something they never could have done before they fixed their teeth. Almost 3 in 10 credit teeth straightening with allowing them to conquer a personal goal, and nearly 1 in 5 say their straighter teeth has led to a career upgrade or promotion.

- Most U.S. adults (84%) believe that certain changes to their appearance would give a boost to their confidence including:
 - losing weight (51%)
 - increasing/toning muscle mass (42%)
 - whitening my teeth (31%)
 - new hair cut/style (21%)
 - straightening my teeth (18%), especially women ages 35-44 (31%); men ages 18-54 (22%); parents of children under 18 (24%) and those whose teeth aren’t completely straight (22%)
 - clearing my skin/skin rejuvenation (e.g., fillers, injections) (17%)
 - new make-up (10%)
 - getting a nose job (4%)
 - gaining weight (4%)

- Over 4 in 10 U.S. adults (44%), including over half those ages 35-44 (54%), say they would feel more confident if they had straighter teeth. Among those whose teeth aren't completely straight, nearly half (49%) feel this way.

Most (of those who have had their teeth straightened as an adult or used adult braces) say that straight teeth are at important to:

- confidence (92%)
 - overall appearance (91%)
 - personal well being (83%)
 - success in the work place (76%)
 - overall health (76%)
- Three-quarters (of those who straightened their teeth/had braces as an adult) experienced at least some positive impact (75%) on their life due to the teeth straightening including:
 - caring more about their physical appearance (44%)
 - changing their physical appearance (33%)
 - upgrading their wardrobe (32%)
 - conquering a personal goal (29%)
 - losing weight (23%)
 - getting a career upgrade/promotion (17%)
 - Of those who have straightened their teeth or used braces as an adult, many cite the following benefits and say straightening their teeth:
 - has made them feel more attractive (89%)
 - has made them feel happier (88%)
 - has made them feel more confident in themselves (87%)
 - has made them more confident (86%)
 - is one of the most important treatments they have ever done for themselves (78%)
 - has given them the confidence to do something they never would've done before they fixed their teeth (e.g., smile without reservation, public speaking, dating) (78%)

EXPERIENCE WITH ADULT TEETH STRAIGHTENING/BRACES

Experience is not Widespread – and Doesn't Happen Overnight

Given the elevated concern and perceived benefits of having straighter teeth, there is an opportunity to enlighten Americans about the procedure. Today, about 1 in 10 or 28 million Americans² have actually pursued teeth straightening or braces as an adult, motivated primarily by financing, shame, or observing someone else's successful results.

Among this "experienced" cohort, the decision to straighten teeth is something that is not impulsive but rather takes quite a bit of consideration and is well-thought out. Most adults wait at least one year (on average, five) before going forward with the treatment. Of those who are "not experienced", most don't yet have any plans to pursue it in the near-term future. But, most of this group is open to the idea of teeth straightening and just appears not to have actively pursued it yet. Over a third see the benefits for themselves personally and/or have taken steps to do something about it, with nearly half of women aged 35-44 recognizing this, as well as over two-thirds of those unsatisfied with their teeth. About 1 in 5 say they are currently unhappy with their teeth and want to do something about it; about 1 in 8 see the benefits for them personally; and about 1 in 7 have already visited a specialist (dentist/orthodontist) to begin to address it.

- Most adults (72%) did not have their teeth straightened/braces as a child. But of those who did, there is a mix of results:
 - 4 in 10 say their teeth are exactly the same as in childhood, without the use of a retainer.
 - Over 1 in 3 (35%) say they have maintained straight teeth by wearing a retainer every night.
 - One-quarter (26%) say they did not properly wear a retainer and currently have crooked teeth, even after the use of braces as a child. Interestingly, over a third (35%) of teenage teeth straighteners whose teeth aren't completely straight say this.
- About 1 in 10 adults (12%) have had some experience with teeth straightening/braces as an adult, either previously or currently.
 - But of those who have not, most (55%) do not plan to straighten their teeth in the future. 14% plan to do it within the next year.
 - However, among those without prior adult teeth straightening experience, over half (54%) who are unsatisfied with the current state of their teeth say plan to pursue teeth straightening at some point.
- Among those who have had teeth straightening/braces as an adult, they typically waited an average of 5 years before deciding to straighten their teeth.
 - Most (73%) waited at least one year or longer.

² 234,564,071 US adults according to 2010 census multiplied by 12% who had braces/teeth straightening as an adult = 28,147,688.52

- For those that have had teeth straightening as an adult, most use or used:
 - traditional wire brackets (61%)
 - clear braces (26%)
 - clear aligners (e.g., Invisalign, ClearCorrect) (23%)
 - ceramic braces (22%)

- The key motivations (for those who have pursued adult teeth straightening or braces) include:
 - availability of financing (i.e. paying costs over time) (34%)
 - embarrassment because of their teeth (34%)
 - seeing someone else's results (32%)
 - change in financial situation (31%)

- Of those who have not had teeth straightening or braces as an adult, less than 4 in 10 (38%) say they don't see any need for the treatment, even though their teeth aren't perfect.
 - Only a very small proportion (4%) admit they are unhappy with their teeth, but don't care to do anything about it.
 - And, only a rare few (6%) are not bothered by their crooked teeth, and don't care to do anything about it.

- Of those who have not had teeth straightening or braces as an adult, over a third (36%) see the benefits for them personally and/or have taken steps to do something about it, specifically:
 - About 1 in 5 (19%) are unhappy with their teeth and want to do something about it, especially women aged 34-44 (34%) and those unsatisfied with the current state of their teeth (56%).
 - About 1 in 7 (14%) have seen a dentist or orthodontist recently to address their teeth.
 - About 1 in 8 (13%) say they believe they could benefit from teeth straightening as an adult, with a quarter (26%) of those unsatisfied with the current state of their teeth feeling this way.

BARRIERS TO ADULT TEETH STRAIGHTENING/BRACES

Cost Is the Major Barrier Standing in the Way of Straight Teeth

By far, the overriding obstacle to getting teeth straightened (or braces) as an adult is cost, both for those who have not yet gone forward with it and for those who have. There is no close second choice for the inexperienced group; cost is the overwhelming barrier, followed as a distant second and third by embarrassment and lack of motivation respectively. For the “experienced” group, cost is also the top obstacle but fear, time and embarrassment rise up as slightly larger hurdles to overcome. That said, most of this cohort alleviated these issues with tangible changes to their financial situation/insurance and/or being fed up with their perceived embarrassment or unattractiveness.

- For those that have not had teeth straightening as an adult but still don’t have straight teeth, the biggest barrier by far to straightening their teeth now is cost (57%), followed far behind by embarrassment of wearing traditional wire and bracket braces (15%) and lack of motivation (14%).
- Cost (57%) was also the top obstacle for those who have had teeth straightening as an adult, followed by:
 - fear (31%)
 - lack of time (29%)
 - embarrassment of wearing traditional wire and bracket braces (24%)
 - don’t have a dentist or orthodontist to go to (22%)

Barrier	“Inexperienced”	“Experienced”
	%	%
Cost	57	57
Embarrassment of wearing traditional wire and bracket braces	15	24
Lack of motivation	14	16
Lack of time	9	29
Fear	8	31
Don’t have a dentist or orthodontist to go to	8	22

- Those who had teeth straightening as an adult successfully resolved any obstacles they faced in doing the procedure because they:
 - no longer wanted to be embarrassed by their teeth/smile (38%)
 - changed their insurance (36%)
 - saw unflattering photos of their smile (31%)
 - experienced a change in their financial situation (31%)

GENDER

Women Care More about Appearance – but Men Are More Likely to Do Something about Teeth

Women are more likely to make a positive connection between perceived confidence and other traits like appearance and happiness. And they are more likely to say the inverse that even one small physical change can have a big impact on their confidence. Many (more than men) cite teeth, weight, hair and skin as all being impactful.

Women are more likely than men to have felt insecure both as teenagers and grown-ups about key physical traits like weight and teeth. So it is not surprising that women (in particular those ages 35-44) are more likely than men to say they are motivated by something (whether it’s health, social stigma or a special event in their lives) to improve their appearance.

When thinking about their teeth specifically, women are more likely than men to recognize the value of straight teeth (notably, those ages 35-44 express the most unhappiness about the current state of their teeth and say they are most driven to do something about it). But interestingly men are the gender that is much more likely to pursue teeth straightening/braces as an adult (despite using them equally often as children).

	Men (906)	Women (1102)
	%	%
Making one simple improvement in my appearance would boost my confidence	62	77
Very much/Somewhat value straight teeth	77	87
Have/had had teeth straightening/braces as adult	15	9

AGE

Insecurity Fades with Age – along with Need to Change Appearance and Teeth

The younger cohorts (Millenials ages 18-34 and Gen Xers ages 35-44) are by far the most likely to emphasize the importance of appearance and make an association between confidence – and happiness, looks, wealth, and success. The youngest group of Millenials (and declining with age) are also more likely to say confidence (or lack of) has a big impact on their participation in life activities.

Not surprisingly, therefore, given the relevance and pressure connected to appearance by the younger cohorts, 18-44 year olds are more likely to have felt insecure about a variety of traits as a teenager (weight in particular rises to the top). And even as grown-ups, older adults above 45 (men more than women) tend to be more confident across the board and less inclined to believe that one single improvement will boost their self-esteem.

On teeth specifically, younger adults (ages 18-44, and especially women) are more likely to value straight teeth and to say they would gain more confidence with straighter teeth. Perhaps a generational priority, 18-34 year olds (and declining with age) are the most likely to say they had some experience getting their teeth straightened as a child and as an adult. Of those without teeth straightening experience, this younger cohort (ages 18-44) also appears the most open to doing it in the future – but they are more likely to flag the barriers, including price, embarrassment, time and fear. With age, this changes, as seniors (who haven't had any experience with teeth straightening as an adult) are less inclined to see any obstacles but also less inclined to see the benefits of treatment and the need to take any steps to proactively change their teeth.

	18-34 (389)	35-44 (98*)	45-54 (145)	55-64 (277)	65+ (255)
	%	%	%	%	%
I would feel more confident in myself if I had straighter teeth.	56	54	42	38	23
My lack of confidence often holds me back from participating in important life activities (e.g., weddings, public speaking).	49	47	40	26	16
Very much/Somewhat value straight teeth	87	88	81	78	74
Plan to straighten teeth (among those who have not had teeth straightening/braces as adult)	36	36	26	20	7

SURVEY DATA

BASE: U.S. RESPONDENTS

Q1005 How much do you agree or disagree with each of the following statements?

Making one simple improvement in my appearance would boost my confidence.

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Strongly/Somewhat Agree	70%	84%	73%
Strongly Agree	26%	36%	30%
Somewhat Agree	44%	48%	42%
Strongly/Somewhat Disagree	30%	16%	27%
Strongly Disagree	16%	10%	11%
Somewhat Disagree	14%	7%	17%

I would feel more confident in myself if I had straighter teeth.

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Strongly/Somewhat Agree	44%	52%	37%
Strongly Agree	18%	19%	13%
Somewhat Agree	26%	33%	24%
Strongly/Somewhat Disagree	56%	48%	63%
Strongly Disagree	24%	14%	27%
Somewhat Disagree	32%	34%	36%

My lack of confidence often holds me back from participating in important life activities (e.g., weddings, public speaking).

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Strongly/Somewhat Agree	36%	45%	47%
Strongly Agree	14%	18%	13%
Somewhat Agree	22%	27%	34%
Strongly/Somewhat Disagree	64%	55%	53%
Strongly Disagree	27%	25%	26%
Somewhat Disagree	36%	30%	27%

BASE: U.S. RESPONDENTS

Q1010 Which of the following completes this sentence for you? Please select all that apply.

When I feel confident, people are more likely to perceive me as...

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Happier	63%	71%	57%
More attractive	44%	59%	41%
More successful	43%	34%	38%
Smarter	40%	33%	38%
Kinder	24%	21%	22%
Wealthier	12%	13%	11%
Available/Single	9%	11%	7%
Something else	3%	2%	5%
None	9%	4%	11%

BASE: U.S. RESPONDENTS

Q1015 Which of the following, if any, motivates you to make an improvement in your physical appearance?

Please select all that apply.

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Something Motivates Change (Net)	91%	96%	94%
Maintaining my health	66%	69%	66%
The desire to have more confidence	38%	56%	44%
Pleasing someone else (e.g., life partner/spouse)	34%	32%	34%
Desire to look younger	28%	41%	44%
A special event/moment in life (e.g., wedding, reunion)	28%	32%	36%
Having the money/financial ability	25%	29%	30%
My children	18%	26%	27%
New job or career	15%	23%	15%
Something else	3%	6%	1%
Nothing	9%	4%	6%

BASE: U.S. RESPONDENTS

Q1020 Which of the following of your personal characteristics, if any, were you insecure about as a teenager?
Please select all that apply.

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Anything (Net)	79%	88%	80%
Weight	39%	47%	36%
Personality	25%	27%	14%
Teeth	23%	32%	21%
Height	17%	14%	18%
Intelligence	15%	12%	14%
Nose	14%	20%	18%
Sense of humor	7%	8%	4%
Other personal characteristic	9%	14%	10%
Nothing	21%	12%	20%

BASE: U.S. RESPONDENTS (VARIABLE BASES)

Q1025 And which of the following of your personal characteristics, if any, are you still insecure about now?
Please select all that apply.

	Total	Women 35-44	Women 45-54
Anything (Net)	60%	69%	70%
Weight	60%	72%	80%
Teeth	57%	60%	44%
Nose	50%	51%	51%
Intelligence	42%	43%	43%
Sense of humor	40%	47%	57%
Personality	35%	16%	28%
Height	27%	28%	28%
Other personal characteristic	43%	52%	67%
Nothing	40%	31%	30%

BASE: U.S. RESPONDENTS**Q1030** Which of the following changes in your physical appearance, if any, would boost your confidence?

Please select all that apply.

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Any (Net)	84%	96%	89%
Losing weight	51%	68%	60%
Increasing/toning muscle mass	42%	56%	42%
Whitening my teeth	31%	38%	21%
New hair cut/style	21%	36%	27%
Straightening my teeth	18%	31%	12%
Clearing my skin/skin rejuvenation (e.g., fillers, injections)	17%	33%	12%
New make-up	10%	25%	18%
Getting a nose job	4%	8%	3%
Gaining weight	4%	2%	2%
Other change in my physical appearance	5%	4%	5%
None	16%	4%	11%

BASE: U.S. RESPONDENTS**Q1035** Which of the following, if any, describes the current state of your teeth? Please select all that apply.

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Teeth (Net)	48%	49%	44%
I am missing a tooth/teeth.	23%	23%	22%
I have crooked teeth.	18%	17%	13%
I have crowding in my teeth.	14%	11%	15%
I have gaps/spaces between my teeth.	13%	15%	10%
All my teeth are completely straight	20%	24%	15%
Bite (Net)	17%	12%	13%
I have an overbite.	12%	8%	11%
I have a cross bite.	2%	2%	2%
Open bite	2%	2%	1%
Missing under bite	2%	-	-
Dentures/Implants/Veneers (Net)	16%	9%	14%
I wear dentures.	8%	4%	7%
I have implant(s).	5%	4%	1%
I have veneers.	4%	3%	6%
I have teeth straightening/braces.	2%	1%	3%
None of these	20%	22%	29%

BASE: U.S. RESPONDENTS

Q1040 How much, if at all, do you value having straight teeth?

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Very Much/Somewhat	82%	93%	84%
Very Much	41%	54%	45%
Somewhat	41%	39%	39%
Not At All/Not Very	18%	7%	16%
Not Very	13%	4%	12%
Not At All	5%	2%	4%

BASE: U.S. RESPONDENTS

Q1045 In general, how satisfied, if at all, are you with your teeth?

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Very/Somewhat Satisfied	74%	68%	69%
Very Satisfied	28%	22%	29%
Somewhat Satisfied	46%	46%	40%
Not At All/Not Very Satisfied	26%	32%	31%
Not Very Satisfied	18%	22%	21%
Not At All Satisfied	7%	10%	10%

BASE: U.S. RESPONDENTS

Q1047 Which of the following, if any, describe your experience with teeth straightening/braces as a child/teenager?

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
I had teeth straightening/braces as a child/teenager and my teeth are exactly the same (straight) as they were in my childhood/teenage years without the use of a retainer.	11%	12%	16%
I had teeth straightening/braces as a child/teenager and I have maintained my straight teeth by wearing a retainer every night.	10%	6%	4%
I had teeth straightening/braces as a child/teenager and I did not properly wear my retainer and currently have crooked teeth, even after having braces as a child/teenager.	7%	13%	5%
None of these	72%	68%	76%

BASE: U.S. RESPONDENTS

Q1050 Which of the following, if any, describe your experience with teeth straightening/braces as an adult?

	Total	Women 35-44	Women 45-54
<i>n=</i>	2008	162	183
Have/Had Had Teeth Straightening/Braces As Adult (Net)	12%	15%	9%
I have previously had teeth straightening/braces as an adult.	11%	15%	9%
I currently have teeth straightening/braces.	2%	1%	3%
None	89%	85%	91%
Have Not Had Teeth Straightening/Braces As Adult (Net)	88%	85%	91%

BASE: HAVE NOT HAD TEETH STAIGHTENING/BRACES AS ADULT

Q1055 Which of the following, if any, are true for your teeth? Please select all that apply.

	Total	Women 35-44	Women 45-54
<i>n=</i>	1835	141	164
While my teeth aren't perfect, I don't see a need for teeth straightening as an adult.	38%	38%	35%
I am unhappy with my teeth and want to do something about it.	19%	34%	23%
I have seen a dentist or orthodontist recently to address my teeth.	14%	13%	15%
I believe I could benefit from teeth straightening as an adult.	13%	15%	14%
My crooked teeth don't bother me, so I don't care to do anything about it.	6%	5%	6%
I am unhappy with my teeth, but I don't care to do anything about it.	4%	5%	2%
None of these	28%	21%	33%

BASE: HAVE NOT HAD TEETH STAIGHTENING/BRACES AS ADULT

Q1060 When, if at all, do you plan to/would you like to straighten your teeth in the future?

	Total	Women 35-44	Women 45-54
<i>n=</i>	1835	141	164
Ever (Net)	25%	34%	23%
Within the next 6 months	4%	5%	7%
Within the next year	10%	12%	6%
2-4 years from now	7%	11%	6%
5 years or more years from now	4%	6%	4%
Never	55%	46%	64%
N/A - All my teeth are completely straight.	20%	20%	14%

BASE: HAVE NOT HAD TEETH STAIGHTENING/BRACES AS ADULT AND TEETH AREN'T ALL COMPLETELY STRAIGHT

Q1065 Which of the following, if any, are/would be barriers to straightening your teeth? Please select all that apply.

	Total	Women 35-44	Women 45-54
<i>n=</i>	1482	107	134
Anything (Net)	69%	78%	67%
Cost	57%	69%	52%
Embarrassment of wearing traditional wire and bracket braces	15%	17%	3%
Lack of motivation	14%	12%	10%
Lack of time	9%	12%	4%
Fear	8%	15%	3%
Don't have a dentist or orthodontist to go to	8%	7%	7%
Other	8%	2%	12%
None	31%	22%	33%

BASE: HAVE HAD TEETH STAIGHTENING/BRACES AS ADULT

Q1070 Which of the following did you use for teeth straightening as an adult? Please select all that apply.

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Traditional wire brackets	61%	41%	74%
Clear braces	26%	26%	15%
Clear aligners (e.g., Invisalign, ClearCorrect)	23%	15%	21%
Ceramic braces	22%	8%	3%
Other	7%	19%	3%

BASE: HAVE HAD TEETH STAIGHTENING/BRACES AS ADULT

Q1075 How important, if at all, would you say straight teeth are to each of the following?

Confidence

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Very/Somewhat Important	92%	99%	95%
Very Important	59%	66%	53%
Somewhat Important	33%	33%	42%
Not At All/Not Very Important	8%	1%	5%
Not Very Important	4%	1%	5%
Not At All Important	4%	-	-

Overall appearance

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Very/Somewhat Important	91%	99%	100%
Very Important	59%	71%	70%
Somewhat Important	33%	27%	30%
Not At All/Not Very Important	9%	1%	-
Not Very Important	4%	1%	-
Not At All Important	4%	-	-

Personal well being

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Very/Somewhat Important	83%	92%	92%
Very Important	42%	31%	54%
Somewhat Important	40%	61%	38%
Not At All/Not Very Important	17%	8%	8%
Not Very Important	11%	8%	5%
Not At All Important	6%	-	3%

Success in the work place

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Very/Somewhat Important	76%	89%	71%
Very Important	39%	38%	27%
Somewhat Important	37%	51%	44%
Not At All/Not Very Important	24%	11%	29%
Not Very Important	17%	11%	13%
Not At All Important	7%	-	16%

Overall health

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Very/Somewhat Important	76%	92%	98%
Very Important	43%	29%	48%
Somewhat Important	33%	62%	50%
Not At All/Not Very Important	24%	8%	2%
Not Very Important	18%	8%	2%
Not At All Important	6%	-	-

BASE: HAVE HAD TEETH STAIGHTENING/BRACES AS ADULT

Q1080 Which of the following, if any, motivated you to have adult teeth straightening/braces? Please select all that apply.

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Availability of financing (i.e. paying costs over time)	34%	37%	37%
Embarrassment because of my teeth	34%	41%	44%
Seeing someone else's results	32%	19%	23%
Change in financial situation	31%	34%	16%
Life event (e.g., wedding, new job, dating)	25%	9%	21%
Found a dentist or orthodontist I liked	24%	19%	26%
Seeing unflattering photos of my smile	22%	17%	11%
Insurance coverage	21%	21%	39%
Promotion/Discount offer	11%	12%	12%
Other	15%	17%	17%

BASE: HAVE HAD TEETH STAIGHTENING/BRACES AS ADULT

Q1085 Which of the following, if any, were once barriers to straightening your teeth? Please select all that apply.

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Experienced Barriers (Net)	87%	87%	91%
Cost	57%	51%	80%
Fear	31%	5%	18%
Lack of time	29%	13%	23%
Embarrassment of wearing traditional wire and bracket braces	24%	26%	17%
Didn't have a dentist or orthodontist to go to	22%	7%	8%
Lack of motivation	16%	3%	2%
Other	3%	9%	5%
None	13%	13%	9%

BASE: EXPERIENCED BARRIERS

Q1090 Which of the following encouraged you to overcome the barriers you faced to straighten your teeth?
Please select all that apply.

	Total	Women 35-44	Women 45-54
n=	145	18	15
No longer wanted to be embarrassed by my teeth/smile	38%	46%	51%
Change in insurance	36%	27%	34%
Seeing unflattering photos of my smile	31%	11%	30%
Change in financial situation	31%	47%	56%
Found a dentist or orthodontist I like	27%	19%	14%
Ability to finance (i.e. paying costs over time)	26%	13%	35%
Seeing someone else's results	18%	6%	6%
Life event (e.g., wedding, new job, dating)	15%	6%	9%
Other	6%	2%	6%

BASE: HAVE HAD TEETH STAIGHTENING/BRACES AS ADULT

Q1095 Before you decided to pursue teeth straightening, how long had you wanted to straighten your teeth?
If less than 1 year, please enter "0."

	Total	Women 35-44	Women 45-54
n=	173	21	19
Less than 1 year	27%	31%	31%
1 year	17%	14%	18%
2 year	14%	12%	-
3-5 years	18%	17%	6%
6-10 years	11%	15%	34%
More than 10 years	13%	12%	11%
Mean (in years)	5.2	4.8	5.3

BASE: HAVE HAD TEETH STAIGHTENING/BRACES AS ADULT

Q1105 How much do you agree or disagree with each of the following statements about straightening your teeth?

I feel more attractive because I straightened my teeth.

	Total	Women 35-44	Women 45-54
n=	173	21	19
Strongly/Somewhat Agree	89%	98%	80%
Strongly Agree	51%	38%	35%
Somewhat Agree	38%	60%	45%
Strongly/Somewhat Disagree	11%	2%	20%
Strongly Disagree	11%	2%	20%
Somewhat Disagree	*	-	-

I am happier because I straightened my teeth.

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Strongly/Somewhat Agree	88%	92%	92%
Strongly Agree	50%	43%	51%
Somewhat Agree	39%	50%	40%
Strongly/Somewhat Disagree	12%	8%	8%
Strongly Disagree	8%	8%	8%
Somewhat Disagree	3%	-	-

I feel more confident in myself now that I have straight teeth.

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Strongly/Somewhat Agree	87%	89%	87%
Strongly Agree	51%	40%	52%
Somewhat Agree	36%	49%	35%
Strongly/Somewhat Disagree	13%	11%	13%
Strongly Disagree	13%	11%	13%
Somewhat Disagree	1%	-	-

I am more confident because I straightened my teeth.

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Strongly/Somewhat Agree	86%	89%	85%
Strongly Agree	52%	49%	22%
Somewhat Agree	34%	40%	63%
Strongly/Somewhat Disagree	14%	11%	15%
Strongly Disagree	11%	11%	15%
Somewhat Disagree	3%	-	-

Straightening my teeth was one of the most important treatments I've ever done for myself.

	Total	Women 35-44	Women 45-54
<i>n=</i>	173	21	19
Strongly/Somewhat Agree	78%	94%	67%
Strongly Agree	46%	46%	40%
Somewhat Agree	32%	48%	26%
Strongly/Somewhat Disagree	22%	6%	33%
Strongly Disagree	18%	6%	28%
Somewhat Disagree	4%	-	5%

Straightening my teeth gave me the confidence to do something I never would've done before I fixed my teeth (e.g., smile without reservation, public speaking, dating).

	Total	Women 35-44	Women 45-54
<i>n</i> =	173	21	19
Strongly/Somewhat Agree	78%	77%	80%
Strongly Agree	48%	49%	38%
Somewhat Agree	30%	28%	42%
Strongly/Somewhat Disagree	22%	23%	20%
Strongly Disagree	17%	8%	15%
Somewhat Disagree	5%	15%	5%

BASE: HAVE HAD TEETH STRAIGHTENING/BRACES AS ADULT

Q1110 Which of the following positive effects did you experience in another part of your life, if any, as a result of straightening your teeth? Please select all that apply.

	Total	Women 35-44	Women 45-54
<i>n</i> =	173	21	19
Any (Net)	75%	54%	81%
Started caring more about my physical appearance	44%	26%	51%
Changed my physical appearance	33%	26%	54%
Upgraded my wardrobe	32%	9%	18%
Conquered a personal goal	29%	11%	5%
Lost weight	23%	7%	33%
Career upgrade/Promotion	17%	8%	6%
Other	2%	-	2%
None	25%	46%	19%

DEMOGRAPHICS**BASE: U.S. RESPONDENTS****Q4005** Gender

	Total
<i>n=</i>	2008
Male	48%
Female	52%

BASE: U.S. RESPONDENTS**Q4007** Age

	Total
<i>n=</i>	2008
18-34	29%
35-44	17%
45-54	15%
55-64	20%
65+	19%
MEAN	47.2

BASE: U.S. RESPONDENTS**Q2102** Parent/Legal Guardian of child/children living at home

	Total
<i>n=</i>	2008
Parent/Legal Guardian Of Child Under 18 Years (Net)	24%
2 years old or younger	5%
3-5 years old	7%
6-9 years old	9%
10-12 years old	5%
13-17 years old	10%
I am not the parent/legal guardian of any child under 18 years old who is living at home with me.	76%

BASE: U.S. RESPONDENTS

Q2164 Region

	Total
<i>n=</i>	2008
Northeast	21%
Midwest	22%
South	34%
West	23%

BASE: U.S. RESPONDENTS

Q2146 Education

	Total
<i>n=</i>	
HIGH SCHOOL OR LESS (NET)	31%
Less than high school	-
Completed some high school	3%
Completed high school	28%
ATTENDED COLLEGE OR COLLEGE DEGREE (NET)	49%
Some college, but no degree	20%
Associate Degree	10%
College (such as B.A., B.S.)	19%
ATTENDED GRADUATE SCHOOL OR GRADUATE DEGREE (NET)	11%
Some graduate school, but no degree	3%
Graduate degree (such as MBA, MS, M.D., Ph.D.)	8%
Job-specific training program(s) after high school	10%

BASE: U.S. RESPONDENTS

Q2149 Employment Status

	Total
<i>n=</i>	
Employed full time	36%
Employed part time	11%
Homemaker	9%
Retired	24%
Not employed, unable to work due to a disability or illness	6%
Self-employed	6%
Not employed, but looking for work	6%
Not employed and not looking for work	2%
Student	8%

BASE: U.S. RESPONDENTS

Q2135 Marital Status

	Total
<i>n=</i>	2008
Married or civil union	52%
Divorced	8%
Single, never married	28%
Living with partner	7%
Widow/Widower	5%
Separated	-

BASE: U.S. RESPONDENTS

Q2175 Race/Ethnicity

	Total
<i>n=</i>	2008
Hispanic	14%
Not Hispanic	83%
Decline to Answer	3%

BASE: U.S. RESPONDENTS

Q2178 Race/Ethnicity

	Total
<i>n=</i>	2008
White	77%
Black/African American	13%
Asian or Pacific Islander	2%
Native American or Alaskan Native	1%
Some other race	4%
Decline to Answer	3%

BASE: U.S. RESPONDENTS

Q2157 Annual Household Income (2015)

	Total
<i>n=</i>	<i>2008</i>
Less than \$15,000	8%
\$15,000 to \$24,999	8%
\$25,000 to \$34,999	8%
\$35,000 to \$49,999	12%
\$50,000 to \$74,999	16%
\$75,000 to \$99,999	11%
\$100,000 to \$124,999	8%
\$125,000 to \$149,999	6%
\$150,000 to \$199,999	4%
\$200,000 to \$249,999	2%
\$250,000 or more	2%
Decline to answer	14%

BASE: U.S. RESPONDENTS
Q2145 Current Primary Residence

	Total
<i>n=</i>	<i>2008</i>
Own (Net)	65%
A house that I/we own	58%
An apartment or condominium that I/we own	4%
Another type of home that I/we own	2%
Rent (Net)	32%
A house that I/we rent or lease	15%
An apartment or condominium that I/we rent or lease	15%
Another type of home that I/we rent or lease	1%
None of these	3%