

# **BracesBracesBraces:** 2017 Louisville Consumer Perception Survey

August 2017

This Presentation Will Cover...

agenda

Top Takeaways  
Survey Tool  
Results

# Top Takeaways

# Existing approach has led to BracesBracesBraces dominance in Louisville market

## DENTIST RECOMMENDATION MATTERS TO MOST, BUT SIZABLE GROUP RESEARCHES INDEPENDENTLY

45% of respondents said their child's dentist's recommendation mattered significantly, compared to 26% who said the dentist's recommendation had little to no influence. This suggests that while many patients are likely to follow the dentist's recommendation, some are willing to shop around on their own. Accordingly, BBB should continue growing relationships with dentists as well as promoting itself via direct-to-consumer communication.

## BEING KID-FRIENDLY IS KEY TO PARENTS' DECISION

As opposed to choosing a dental provider based on price and location, parents say that a kid-friendly orthodontist is more important than anything else when choosing where their child will get braces. BBB can capitalize on this by continuing to promote how it makes children feel comfortable, stay patient, and reduce discomfort as much as possible. This is particularly important for the 26% who tend to disregard their child's dentist's recommendation and do their own research to find an orthodontist for their child.

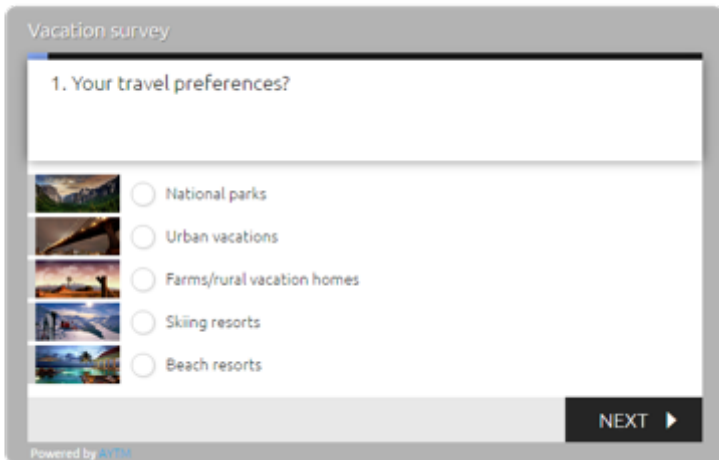
# Survey Tool



# Louisville Orthodontics Survey

NOTE: This survey was hosted on SurveyMonkey and AYTM.com. For AYTM.com, we had respondents delivered via Lightspeed. Respondents were already pre-screened to be parents living in the Louisville metro area. We then had a screening question that asked if their children had braces. Only those respondents who passed the screening test were included in the cost. All responses were combined for the final report.

[\[See how survey takers saw this survey\]](#)



Vacation survey

1. Your travel preferences?

- ☐ National parks
- ☐ Urban vacations
- ☐ Farms/rural vacation homes
- ☐ Skiing resorts
- ☐ Beach resorts

NEXT ►

Powered by AYTM

**ORDER DETAILS:**

**RESPONSES:** 91

**DATES IN FIELD:** JULY 7 TO AUGUST 5, 2017

**TARGET MARKET:**

**COUNTRY:** UNITED STATES

**LANGUAGE:** ENGLISH

**GENDER:** MALES AND FEMALES

**AGE RANGE:** 18 - 65+ YEARS OLD

**EDUCATION:** ANY

**RELATIONSHIP:** ANY

**PARENTAL STATUS:** PARENT OF AT LEAST ONE CHILD

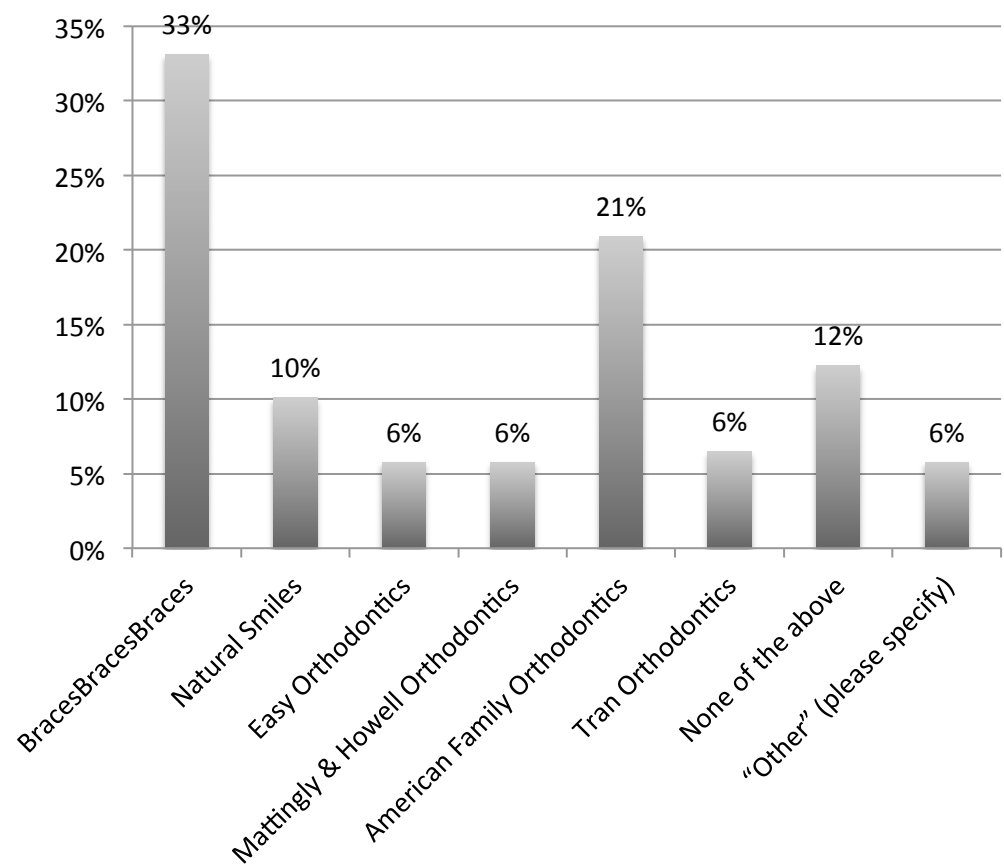
**LOCATION:** METRO AREAS (CSA/MSAS/μSA)

**AMARILLO-BORGER, TX:** ANY

**LOUISVILLE DMA KY-IN:** ALL

# Results

# 1: Have you ever heard of the following orthodontists before?

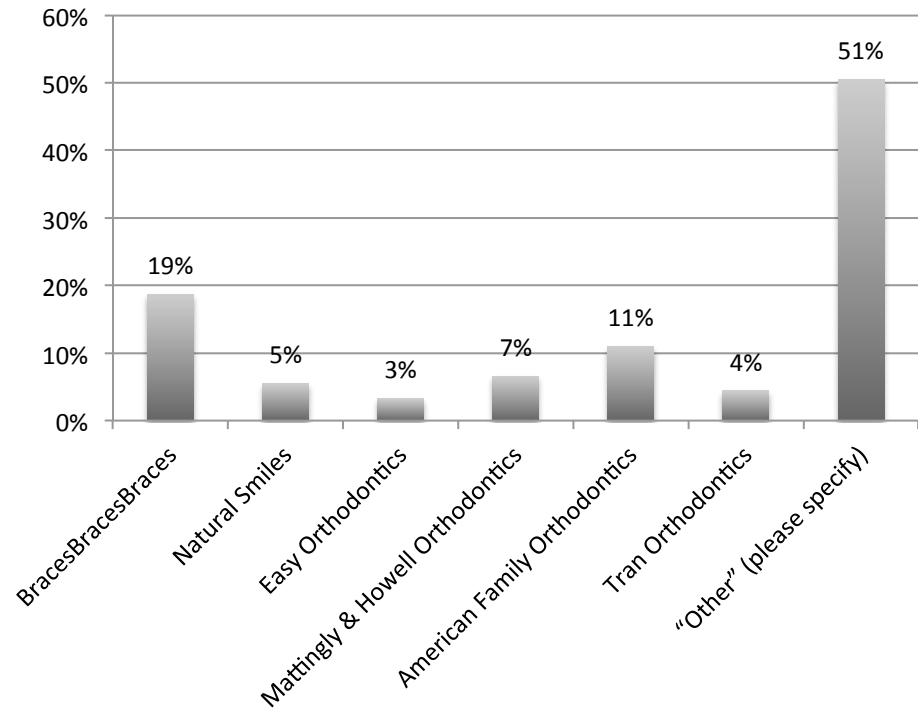


Answer	Percent	Number
BracesBracesBraces	33%	46
Natural Smiles	10%	14
Easy Orthodontics	6%	8
Mattingly & Howell Orthodontics	6%	8
American Family Orthodontics	21%	29
Tran Orthodontics	6%	9
None of the above	12%	17
"Other" (please specify)	6%	8

BBB is the clear mindshare leader with about 33% awareness. No other orthodontist in Louisville comes within 10 points, indicating that BBB has a very strong lead. That being said, American Family is second with 21% and represents the largest single competitor.



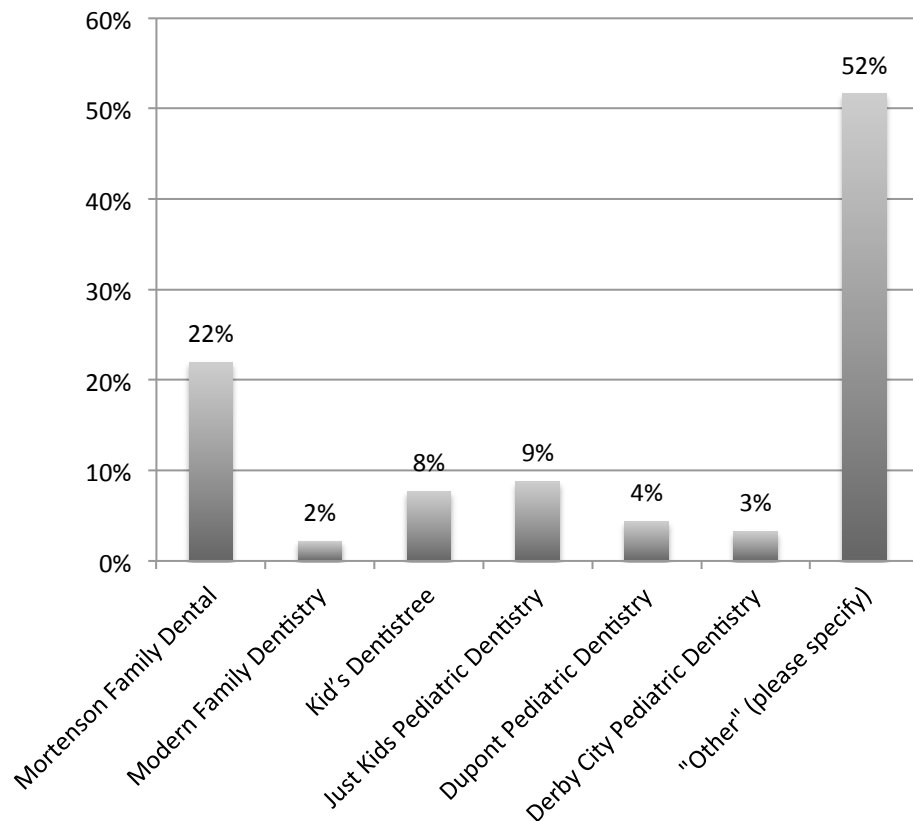
2: Select which orthodontic office you took your child to for braces.



Answer	Percent	Number
BracesBracesBraces	19%	17
Natural Smiles	5%	5
Easy Orthodontics	3%	3
Mattingly & Howell Orthodontics	7%	6
American Family Orthodontics	11%	10
Tran Orthodontics	4%	4
"Other" (please specify)	51%	46

Aside from smaller ortho practices that make up the majority of the market share (51%), BBB is the market share leader in Louisville. This indicates that while a significant minority of patients are going to smaller practices, BBB has the largest share of its similar competitors.

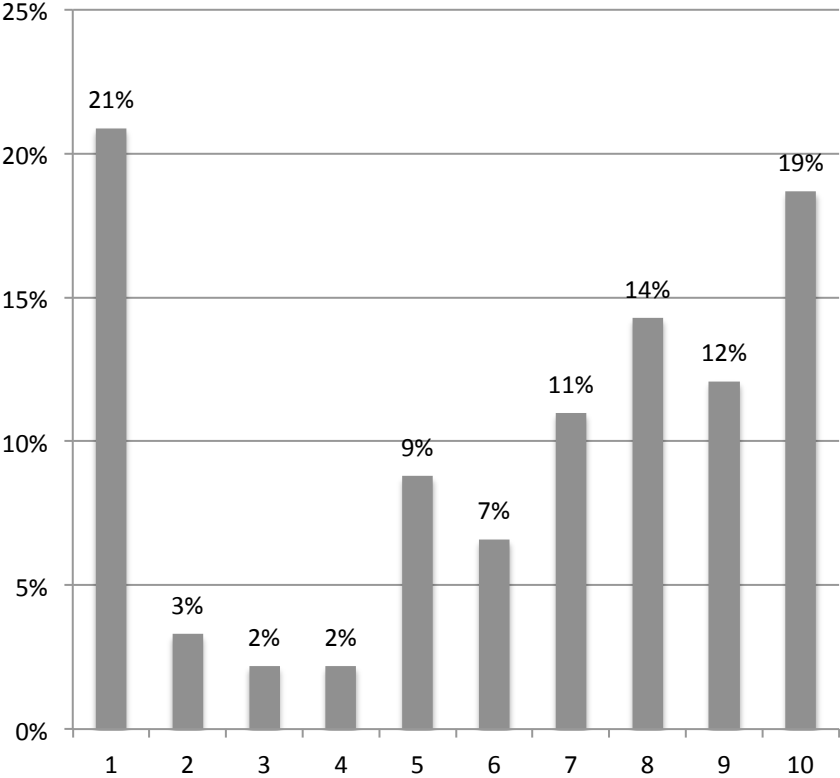
### 3: What dentist did your child go to?



Answer	Percent	Number
Mortenson Family Dental	22%	20
Modern Family Dentistry	2%	2
Kid's Dentistree	8%	7
Just Kids Pediatric Dentistry	9%	8
Dupont Pediatric Dentistry	4%	4
Derby City Pediatric Dentistry	3%	3
"Other" (please specify)	52%	47

A majority of children go to a smaller dental office for care. Of those who go to larger or chain offices, MDP leads with Mortenson and KDT holding 30% of market share.

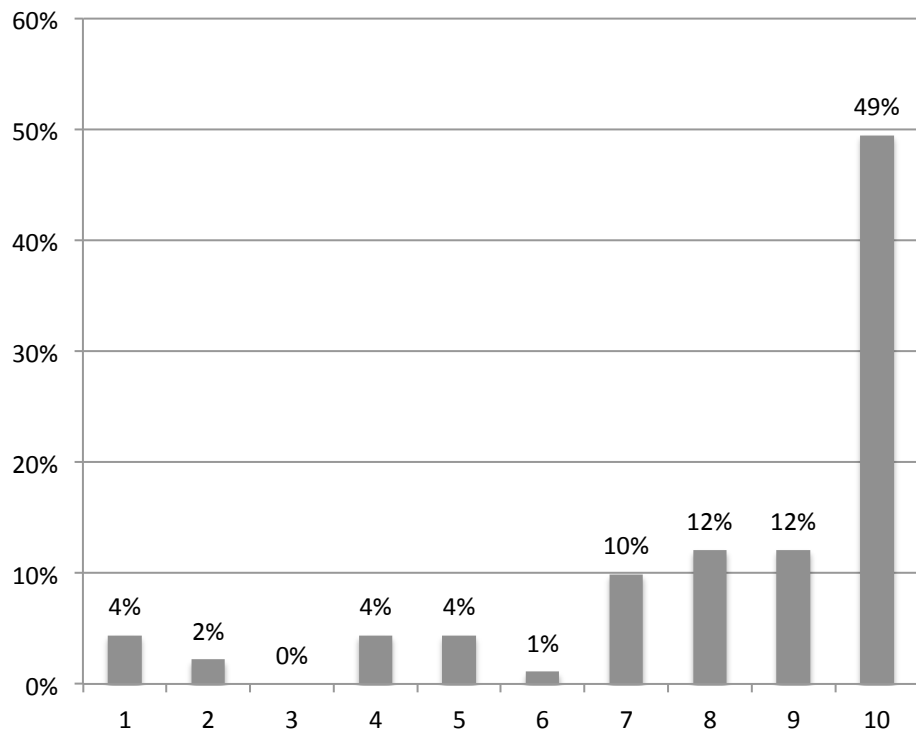
4: How much influence did your child’s dentist have on where you took them to get braces? (1=None, 10=Complete)



Answer	Percent	Number
1	21%	19
2	3%	3
3	2%	2
4	2%	2
5	9%	8
6	7%	6
7	11%	10
8	14%	13
9	12%	11
10	19%	17

26% of respondents said their dentist had little to no influence (3 or less) on where they took their children to get braces, whereas 45% said the influence was significant to complete (8 or greater). This suggests that dentist referrals are important, but not necessarily the only thing that matters.

## 5: Overall, how likely are you to recommend your child's orthodontist to friends or family members? (1=Not at all, 10=Definitely)



Answer	Percent	Number
1	4%	4
2	2%	2
3	0%	0
4	4%	4
5	4%	4
6	1%	1
7	10%	9
8	12%	11
9	12%	11
10	49%	45

83% of respondents were likely to recommend their child's orthodontist (rating their likelihood at 8 or more). This indicates the importance of a positive office experience as people do rely on the other factors other than a dental referral.

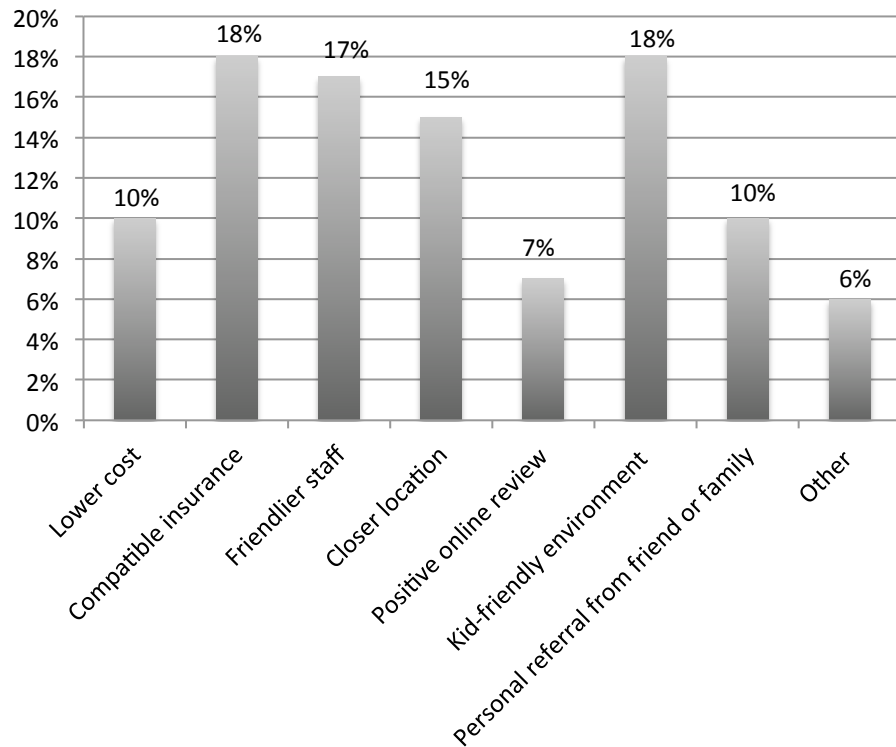
## 6: Why or why not would you recommend your child's orthodontist?



Most of the comments related to why someone would recommend an orthodontist are personal (great, nice, patient) but none stand out as much as **child-friendly**.



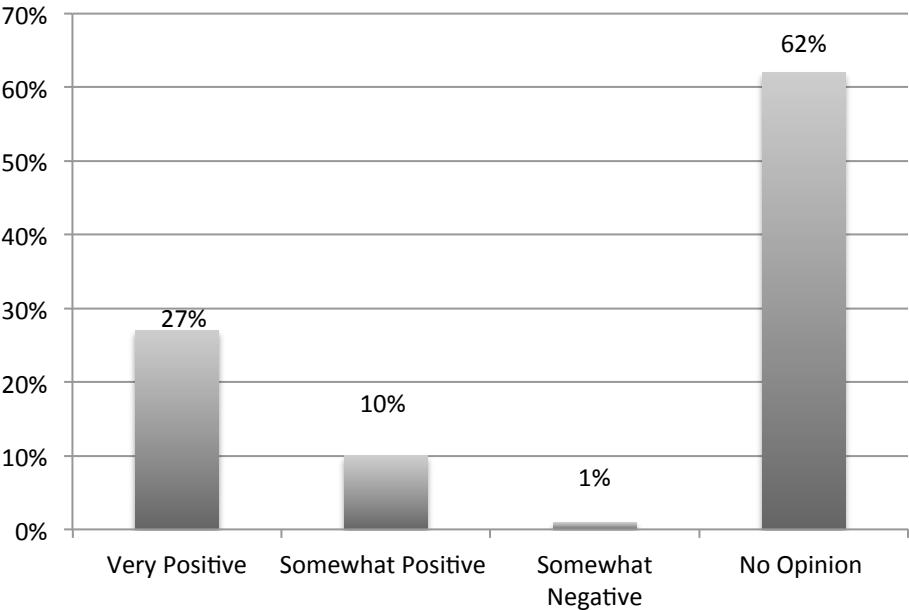
## 7: What factors were most important to you when choosing an orthodontic office for your child?



Answer	Percent	Number
Kid-friendly environment	18%	45
Compatible insurance	18%	45
Friendlier staff	17%	42
Closer location	15%	37
Lower cost	10%	25
Personal referral from friend or family	10%	24
Positive online review	7%	17
Other	6%	15

Staff friendliness, both to children and parents, is a key factor when parents choose an orthodontist for their children. Insurance, however, is equally important, and is likely a disqualifying factor if a particular office doesn't take their insurance.

# 8: What is your opinion of BracesBracesBraces?



Answer	Percent	Number
Very Positive	27%	25
Somewhat Positive	10%	9
Somewhat Negative	1%	1
No Opinion	62%	56
Very Positive	27%	25

A majority of parents whose children have had braces offered no opinion about BBB. Of those who have an opinion, most are Very Positive. This suggests that those who have had experiences (or know someone who has) with BBB have positive brand sentiment—a desired outcome for delivering positive patient care.

# Thank You

@Scoppechio

