Colgate toothbrushes show mass appeal while Oral B brushes attract a wealthier buyer

Roy Morgan Research

The latest Roy Morgan Research reveals that 80% of toothbrush users brush more often with a manual toothbrush, 17% opt for a battery or electric powered model most often, with 3% using both. Colgate dominates the manual toothbrush segment while Oral B leads the battery operated/electric toothbrush segment. Roy Morgan Single Source data provides an insight into how Australians approach what most of us see as a necessary twice daily task. For example, the majority of toothbrush users (83%) replace their toothbrush or brush head at least every 6 months and of those who purchased a toothbrush in the last six months, 84% purchased from a supermarket, 7% from a chemist and 6% a discount store (such as Big W).Brands of Toothbrush Used Most OftenSource: Roy Morgan Single Source, April 2010 March 2011, n = 15,120.Colgate is the clear market leader for manual toothbrushes, with 36% of users using Colgate manual toothbrushes most often, Oral-B and Supermarket Brands follow, with 17% and 11% respectively. However Oral-B dominates the battery/electric toothbrush segment, with 17% of toothbrush users using Oral-B battery/electric toothbrushes most often.Whilst Colgate and Oral-B are clearly the most popular brands of toothbrush, they attract different users. Colgates strongest appeal is amongst younger users (51% are aged under 40 years compared to 42% of the population), while Oral B users tend to be older (64% are 40+ compared to 58% of the population) and from a high socio-economic background (28% from the upper AB quintile). People who use Supermarket brand toothbrushes are more likely than average to be living in older households and from the lower socio-economic quintiles (51% are from the E and FG quintiles).Over the last three years, there has been little movement in the popularity of brands, although both Colgate and Oral B have had limited success (used by 2.1% and 1.9% more users respectively), while Supermarket Brands remained stable. Oral B also strengthened its appeal amongst in the Battery / Electric toothbrush users (the brand was up from 82% to 84% of users in this segment).Users of each brand of toothbrush appear to be more loyal to the respective brand of toothpaste if its available. Whilst Colgate toothpaste is by far the most popular across the board (67% of toothbrush users use Colgate toothpaste most often), users of Colgate manual toothbrushes are more likely than any other brand users to use Colgate toothpaste (80% use Colgate toothpaste); likewise those who use Macleans manual toothbrushes are more likely to use Macleans toothpaste (31% vs. 11%) and users of Supermarket brands of toothbrushes are more likely to use Supermarket brands of toothpaste (16% vs. 3%).Norman Morris, Industry Communications Director at Roy Morgan Research, says:

Roy Morgan Single Source data confirms that Colgate and Oral B are the dominant brands in the toothbrush space. The data also reveals that little has been done over the last three years by the private label offerings to challenge their dominance. Supermarket brand toothbrushes are more popular among those groups who are typically more price sensitive (young parents and older households); it may be that the private label brands have yet to convince users that their offering will do the job as well as the leading brands.With users displaying loyalty in terms of which toothpaste they buy this may be one lever marketers can use in designing promotions to attract greater value for their brands within either category.

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