

Market Research - Electric Toothbrush Usage

dentistry.com - Electric Brushes Will Dominate the Future

There are several types of electric toothbrushes.

Even though manufacturers introduce new manual brushes at a dizzying rate, improved electric toothbrushes make new converts each year.

"The best guesses put electric toothbrush users at about 20 percent, maybe as high as 25 percent of the market," says Alexandra Artisuk, D.D.S., a general dentist. "Each year, I see more and more of my patients using electric brushes."

If more people are making the switch to electric, why do companies bother to develop new manual brushes?

"Mostly because electric toothbrushes are more expensive than manual brushes, which you can easily purchase for less than \$2," says Kathy Hettrich, professional marketing manager for Bausch & Lomb. Her company revolutionized the electric toothbrush industry when it produced the Interplak® toothbrush three decades ago.

"We think more and more people will switch to electric but we don't see a time when manual toothbrushes will be a thing of the past," she says. "It is logical to believe that electric brushes could eventually take over more than half of the market because they are superior plaque removing devices."

Indeed, numerous studies confirm that electric brushes are superior plaque removing devices and are extremely effective in stimulating gums. But consumers like them for another reason: They are simply easier to use, especially for older people who may have dexterity problems.

"You often hear dentists say they don't care whether their patients use a \$2 brush or a \$100 electric-powered brush, just as long as they use it correctly to remove plaque," says David Engel, D.D.S., Ph.D., director of research and regulatory affairs for the Bellevue, WA-based Optiva Company, maker of Sonicare®. "However, electric brushes have been proven much more effective than manual brushes in many studies."

Another myth, he says, is that electric toothbrushes are nothing more than fancy toys that people use for a while, then stash under the sink. "People use them and keep using them and usually find it hard to return to manual brushes," he says. "The market for electric brushes is increasing because people find them effective."

Some electric models include interchangeable color-coded brush heads, so one power handle can serve a family of brushers. Others have built-in timers. Travelers can find models that go for two weeks without a recharge. The following models represent a new generation of brushes that collect energy from a power base overnight, then operate cordlessly.

Braun Oral-B® Plaque Remover Deluxe. The stripe on the bristle fades, letting users know when the brush head needs replacing. The handle light blinks when the recommended brushing time--two minutes--expires.

Oral Ease Automatic Flosser and Power Brush. This brush contains a floss-wrapped flywheel that rotates at 35 revolutions per second, providing users with an automatic flosser.

Oralgene®. Multiple brush heads surround teeth and gums, a sensation similar to sending teeth through a car wash.

Panasonic® Power Floss and Brush. This tool has two brushing motions, three speeds and four color-coded brushes and flossing stems, sized differently for kids and adults. The horizontal and vertical brushing motions combine to mount a multifaceted attack.

Rota-dent®. Offered only through dentists who personally instruct patients how to use the brush, this implement offers interchangeable brush tips that offer different tools for specific tooth types.

Sonicare®. Delivers 31,000 strokes per minute; a built-in timer signals an end to brushing after two minutes.

The future, says Dr. Engel, belongs with electric brushes. "The manual brushes really can't go much further," he says. You can make slight adjustments but I think the real advances of the future will come with the electric models."

Or perhaps with models that use other forms of energy, such as ultrasound. The Ultra-Sonex® toothbrush system, manufactured by Sonex International is a manual brush with a transducer embedded in the brush head. Theoretically, the ultrasonic waves are transmitted from the transducer to the brush head and the bristles.

"In many ways, this brush is very similar to a manual model because you brush your teeth just like you would with a manual toothbrush," says Mark Mintzer, DMD, vice president and director of dental professional marketing for Ultra-Sonex. Dr. Mintzer says that sales of the brush have increased dramatically as more dentists become aware of the product and how it works. "You have to convince them this is a legitimate, viable product, because they are skeptical."

The first task, says Dr. Artisuk, is to convince patients to brush, but she agrees there is a certain appeal with electric brushes.

"People are more and more attracted to electric brushes and I've seen more patients cross over and leave their manual brushes behind," she says. "The electric brushes clearly are the ones to watch in the future. They're getting better and better and my guess is that there will come a day when more people have electric brushes than manual ones."

Consumer Goods – May 22, 2013

Electric toothbrush units recorded the strongest growth within the German personal care appliances market during 2012, in spite of the relatively high average unit price in the category. Electric toothbrush units are benefiting from government information and education campaigns which are promoting the message that maintaining good dental hygiene is vitally important due to the major health benefits which maintaining good oral and dental hygiene can provide.

BeamToothbrush.com

U.S. Sales of Oral Care Products Are Nearing \$5 Billion

Posted May 24th, 2013.

Filed under Bluetooth Toothbrush, Oral Care, Teeth, Teeth Brushing, Teeth Hygiene, Toothbrush, Toothpaste.

The oral health products industry is growing, and growing fast. In fact, it's going to (almost) hit \$5 billion this year, and Beam Toothbrush gets to be a small part of that.

There are two major contributing factors that have come into play, resulting in the \$4.9 billion annual sales of over-the-counter oral care products.

The 1950s: The Oral Care Tipping Point

From the Baby Boomers through Generation X and now Generation Y and their kids, they have all grown up with the idea that dental care isn't an elitist offering, but rather, something that is a part of everyday healthcare, like vision care.

Before that, dentists were the place you went to have a painful tooth removed, and that was it. They were pullers, not fixers and cleaners. But seeing the dentist at least once a year has been the norm for most Americans since the 1950s, as has daily oral health care practices.

That's when we started becoming educated on proper health care, brushing, flossing, and rinsing.

It's interesting how in the last 60 years, we've gone from teaching people how to brush to using Bluetooth toothbrushes to sync up with our iPhones. When you think of industries and trends that have grown explosively in a relatively short time, oral care is not the first thing that comes to mind.

SKUs Skew Oral Care Profitability

The number of product offerings in the oral care market is astounding. What once used to be basic offerings of toothpaste separated by brand is now a complex decision tree. Which flavor do you want to buy? With or without sparkles in the gel? Gel or paste? Whitening, normal or for sensitive teeth? The licensed characters version or plain? Even dental floss requires decision-making – “Do I want cinnamon or mint flavor, or just plain? Waxed or unwaxed?”

We remember the days when you bought one toothpaste, one toothbrush, and that was it. We didn't have all these choices. But more products lead to more sales.

In short, the oral care market has matured, and this has resulted in this explosion of oral care product sales.

One research company, Packaged Facts, believes that oral care products will reach \$6 billion annually in sales by 2017, which is an increase of 4% yearly. If you're interested in trends, watch for more unique offerings, such as dental care products targeted specifically for diabetics, a market that is unfortunately a growing part of the U.S. population.

Euromonitor International

TRENDS

In total, oral care grew 2% in current value terms in 2012 to achieve retail sales of US\$6.9 billion. This growth was driven by consumers who were willing to trade up to purchase more advanced oral care offerings. Trading up cannot happen without abandoning old buying habits, limiting total growth potential and resulting in the downfall of certain subcategories at the hands of newer, better products. Mouth fresheners continued its fall at a rate of 6% as people turned to mouthwashes/dental rinses. Manual and battery toothbrushes both fell at a rate of 1% as people decided to upgrade to electric toothbrushes, and tooth whitener value sales dropped by 8% as whitening benefits came to the fore in other staple subcategories.

COMPETITIVE LANDSCAPE

Oral care in the US continued to be closely contested by three major players in 2012, namely Procter & Gamble, Colgate-Palmolive and Johnson & Johnson, which together accounted for a retail value share of 64% of the market. Procter & Gamble, with its Crest, Oral-B, Fixodent and Scope brands maintained its position as the leading player, accounting for a 33% value share.

PROSPECTS

Oral care in the US is predicted to rise 10% in constant value terms over the forecast period to achieve retail sales of US \$7.6 billion in 2017. An inclination to trade up to more premium-positioned products and ever-increasing levels of disposable income to enable this point towards an increasingly positive market for oral care. Should the public's desire to maintain a better level of overall health intensify, it is also possible that innovative products such as Orabrush's tongue brush will see more mainstream adoption, driving growth even more.

USA Population

People QuickFacts

USA

Population, 2012 estimate	313,914,040
Population, 2010 (April 1) estimates base	308,747,508
Population, percent change, April 1, 2010 to July 1, 2012	1.7%
Population, 2010	308,745,538
Persons under 5 years, percent, 2012	6.4%
Persons under 18 years, percent, 2012	23.5%
Persons 65 years and over, percent, 2012	13.7%
Female persons, percent, 2012	50.8%

US Population: 2012 Estimate - 313,914,040

Assumption: Those under 5 years old and those over 75 years old do not use toothbrushes.

Population under 5 years of age – 6.4% - 20,090,498

Population over 75 years of age – 5.9% - 18,520,928

Total population under 5 years and over 75 years - 38,611,426

Remaining population – 275,302,614

Estimated electric toothbrush users @ 20% (Artisuk estimate) - **55,060,522**

Electric Toothbrush Market

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Dr. Artisuk's usage figure may be low based on the following.

Chain Drug Review / August 17, 2009

"USA power toothbrush unit sales in 2009 alone (during the height of the recession) was **23.8 million** (Total of drug stores and discount stores including Wal-Mart Stores, Inc.)"

Euromonitor International

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Conclusion

There is a very large target audience here in the US, probably well over **55 million**. Add the foreign market, and that audience becomes much bigger.