

# ORAL CARE – INDIAN CONSUMER – 2019

Upgrade oral care regimes to move beyond just brushing. Promote breath-freshening as a primary claim alongside functional claims like whitening and sensitivity.



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# Report Content

## EXECUTIVE SUMMARY

- What you need to know – Summary
- Guide consumers to consider oral care regimes beyond brushing; promote breath-freshening and whitening benefits along with functional claims
- Draw inspiration from dental ancillary product formats for the Indian market
  - Graph 1: Top 5 countries by sub-category, Jan 2017-Dec 2018
- Create awareness of oral hygiene to increase usage
- Educate consumers about the various oral care issues
- Swaachh Mukh Abhiyaan (Clean Mouth Mission)
- Colgate reaches out to Mumbai's taxi drivers through oral health program
- 'Say Ahh' announced as World Oral Health Day 2018-20 theme
- Promote the emotional connection between a healthy smile and strong teeth
- Promote mouthwash by linking it to oil pulling/squishing
- Educate consumers on the link between oral care and overall health
- Promote breath-freshening benefits in natural toothpastes
- What it means

## KEY TRENDS

- What you need to know

### Key drivers

- Support the government initiative to create awareness about oral hygiene
- Communicate natural ingredients in oral care
- One fifth of oral care product launches in India carry the botanical/herbal claim
  - Graph 2: Oral care launches by claim, 2017-18
- Amway brings Glister to India with a herbal variant
- Extend the benefits of the GST rate cut to consumers

### Global trends and how they are playing out in India

- Position oral care to offer a morning boost
- Transform the act of brushing to offer energy and freshness
- Offer sustainable oral care products to engage younger consumers
- Earth-friendly bamboo toothbrush
- The Humble Co. not only provides sustainable products but also gives back to society by providing oral care to underprivileged children

## CONSUMER INSIGHTS

- What you need to know

### Oral care regimes are very basic

- Brush up the basics in oral hygiene
- Communicate the healthcare benefits that can be obtained from a complete oral hygiene routine
- Focus on gum health by promoting flossing
- Make mouthwash and tongue cleaner more convenient and simple to use
- Emphasise importance of whiter teeth as a factor of appearance
- Use whitening toothpaste to address sensitivity concerns
  - Graph 3: Types of toothpastes used, May 2018
- Give out free mini samples at dental clinics

### Natural/Ayurvedic toothpaste user behaviour

- Target the more evolved natural toothpaste user
- Mention health claims on natural toothpaste packs
- Bundle breath-freshening dental ancillary products
- Promote the breath-freshening benefits in natural oral care products
- Promote Ayurvedic products using offers/trials/discounts

### Demographic behaviour

- Expand appearance-enhancing benefits to oral care in the North; explore various online channels to launch new products
- Boost importance of fresh breath to younger consumers
- Help younger consumers keep up their self-esteem to better interact in social situations
- Address specific concerns of older consumers
- Address the concerns of each member in the household differently
- Venture into electric toothbrushes in the South and West

## MARKET APPLICATIONS

- Opportunity: Key areas of focus

### Opportunities

- Introduce day and night variant regimes
- Explore the idea of travel-size oral care products
- Make a 'chore' activity more fun for kids

### Who's innovating?

- Connect with kids using special characters
- Engage consumers with colourful and designed toothbrushes
- KCK offers one-stop online store for all oral needs
- Personalised new year resolution printed on the pack
- On-the-go breath strips, toothbrushes for smokers and natural ingredients in mouthwash

### Global innovations

- Make a commodity product more fun and engaging
- Subscribe to a healthier oral care regime
- A smart musical toothbrush that tracks brushing habits
- Offer oral checkups at workplaces
- Offer a concierge experience to make dentist visits more relaxing
- Offer on-the-go format innovations for swishing benefits
- Format innovations in oral care and the entrance of micellar technology for pulling out food particles

### APPENDIX

- Consumer survey methodology

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