Upgrade oral care regimes to move beyond just brushing. Promote breath-freshening as a primary claim alongside functional claims like whitening and sensitivity.
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
  • Colgate reaches out to Mumbai’s taxi drivers through oral health program
  • 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
• 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

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

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
• Make mouthwash and tongue cleaner more convenient and simple to use
• Emphasise importance of whiter teeth as a factor of appearance
  - 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
• 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
• 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
• On-the-go breath strips, toothbrushes for smokers and natural ingredients in mouthwash

**Global innovations**
• 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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