

The Future of Oral Hygiene: Capitalizing On Emerging Trends and Changing Preferences

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Abstracts

Introduction

Oral hygiene consumers deem value-for-money to be the main consideration when purchasing category products, but many factors impact choice. Brand is generally not as important to oral hygiene consumers as either teeth whitening benefits or overall product efficacy. Yet consumers are clearly quality conscious

Scope

Detailed insights and analysis documenting consumers' attitudes towards oral hygiene and the drivers and inhibitors of consumption habits

Data highlighting the importance consumers place on different oral care product features and the frequency of using these products

Strategic conclusions combined with actionable recommendations for all industry players looking to fully capitalize on this category

Covers: France, Germany, Italy, Netherlands, Spain, Sweden, UK, US, Australia, Japan, S. Korea, China, India, Brazil, Russia, UAE and Saudi Arabia

Highlights

A very high level of basic awareness exists about the significance of maintaining good

oral health with 82% of global respondents regarding it as either 'important' or 'very important'. This positive attitude was particularly evident in Brazil

Consumer lifestyles are leading to a plethora of oral health problems. Diets, in particular, are often not conducive to strong teeth given the increasing prevalence of acidic drinks and sugary foods. Gaps in knowledge and understanding are exacerbating the problem, with several falling short in terms of thorough brushing and regular dentist visits

It is apparent that majorities of consumers globally are concerned by differing oral hygiene issues covered in Datamonitor's research. In particular, the build up of plaque and bad breath were issues of concern; more than half of respondents claimed to be both concerned about these issues AND actively using oral care products to address the issue

Reasons to Purchase

Consumer understanding: obtain a detailed understanding of consumer attitudes and behaviors towards oral hygiene products by accessing unique data

Market understanding: identify the key markets and product innovation trends in 17 countries across five geographic territories

Ideation: find inspiration for innovative oral care formulations and product positioning which cater to the overwhelming consumer emphasis on value

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THE FUTURE DECODED

INTRODUCTION: Oral hygiene is a major component of the overall personal care market

This report is one in a series of five category focused reports outlining personal care trends

The value of the oral hygiene market is currently being eclipsed by that of the personal care market overall

Today's oral hygiene market is subject to a number of drivers and inhibitors

TREND: 'Visual Culture' and an associated pre-occupation with appearance is the defining trend in the personal care space across product categories

Image is important to consumers even if they do not significantly feel societal pressure to look good (at least consciously that is)

There is scope for consumers to feel happier about their appearance, given the pressure to conform to demanding beauty ideals associated with contemporary society
Visual Culture reflects the reality that people tend to gain status and value through their appearance

Key takeouts and implications: Visual Culture is the core macro-trend influencing personal care habits, including oral care

TREND: Sales of oral hygiene products have proven steady, driven by innovation that increasingly defies the commodity status often bestowed upon the category

The market value of oral hygiene products has grown at a consistent rate

However, the recession has undoubtedly had an impact consumer behavior

Key takeouts and implications: the high functionality focus of oral hygiene products means that they are recession-resistant, but branded players are vulnerable to cheaper private label alternatives

INSIGHT: Consumers' widespread concern about oral hygiene is somewhat undermined by knowledge gaps and motivation to maintain good habits

Consumers generally understand the importance of maintaining good oral hygiene, but oral health problems are prevalent nevertheless

Despite placing high importance attributed to the maintenance of good oral hygiene, evidence indicates that consumers are less satisfied with the results of their oral care regimes

Consumers are generally concerned by a broad range of issues associated with oral hygiene, ranging from plaque to the need to floss

Key takeouts and implications: industry players must capitalize on the high importance attached to good oral hygiene with engagement driven marketing activity

INSIGHT: Oral hygiene consumers deem value-for-money to be the main consideration when purchasing category products, but many factors impact choice

Value-for-money considerations heavily influence oral hygiene product choices across regions

The high costs associated with poor oral hygiene have potentially added commercial leverage with consumers being so heavily value-orientated

Key takeouts and implications: oral care players must embrace value-led marketing tactics

INSIGHT: Brand loyalty is not as important to oral hygiene consumers as either teeth whitening benefits or overall product efficacy

Being both quality and brand conscious typically characterizes oral hygiene consumers, but there are notable variations by country and gender

Key takeouts and implications: branding is not as important to consumers in the oral hygiene category as it is in other 'fashionable' categories such as make-up or fragrances, but efficacy-led quality is

INSIGHT: Consumers are becoming increasingly interested in oral hygiene products containing natural or organic ingredients and which exude ethicality

Key takeouts and implications: the natural and organic oral care market is set to outgrow the standard market, but such benefits are still secondary for most consumers

INSIGHT: Customization benefits in products such as toothbrushes and toothpastes are a mid-ranking consideration for consumers

Gene-based research may represent the future of personalized offerings in oral care

Key takeouts and implications: product customization/personalization has become a more attractive proposition to consumers who want to feel that their specific oral care requirements are being met rather than using something more generic

INSIGHT: Wider marketing influences are not deemed to be significantly important to consumers' oral care product choices

Key takeouts and implications: consumers trust the recommendations of people they know, so focusing on efficacy is a must so that satisfied consumers are encouraged to advocate brands to others

INSIGHT: Consumption and lifestyle habits, allied with demographic influences, affect oral health in society

Age can have a significant bearing on oral health

Groups said to be at-risk of oral health problems include diabetics and smokers

Key takeouts and implications: oral health problems plague a number of consumer groups, and many aspects of modern lifestyles exacerbate the problem

ACTION POINTS

ACTION: Ensure that value, efficacy, brand-led quality and unique sensory benefits are the core components of oral hygiene brands

Use Datamonitor's Product Launch Analytics (PLA) database to stay abreast of the most prominent product formulation trends both in and outside of the oral care category

ACTION: Adopt a more holistic, longer term approach to driving occasion growth by emphasizing the wider health implications of optimal oral care

Embrace the ideology of 'social marketing' and focus on vulnerable and 'at-risk' consumers in both education initiatives and consumer need-led innovation

Engagement led social marketing is strongly recommended

Ensure that products are marketed as being effective facilitators of improved health and appearance

Consider partnering with providers that deliver wider oral health benefits or embracing similar approaches to innovation to offer a more complete oral health portfolio

ACTION: Promote oral hygiene products as a route to enhanced confidence

Ethical/sustainability led consumption behavior increasingly has status value

ACTION: Combine natural and ethicality credentials for a more compelling, augmented selling proposition

Stay abreast of developments in the natural/ethical oral care segment with a view to capitalizing

Take inspiration from the household cleaning category by helping consumers to understand what ingredients are used and why

Cause related marketing is an effective way of complimenting social marketing and re-enforcing ethicality

ACTION: Continue to help simplify, yet enhance the user experience by delivering more effective oral hygiene solutions

Deliver multi-functionality to exude the convenience and efficacy that consumers want from what is typically a functional-led purchase

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