

Oral Healthcare - UK - January 2011

Report Price: £1500 / \$2310 / €1793



What is this report about?

While the market has reached close to 100% penetration for basic items (eg toothpaste and toothbrushes) and is serviced by a comprehensive and wide-ranging product offer, there is still room for growth. There is an opportunity to upgrade the basic one-step brushing regimen to include a mouthwash and, for more sophisticated shoppers, interdental items, which are relatively uncommon features of bathroom cabinets in the UK.

What have we found out?

- According to research commissioned for this report, worries about yellowing or stained teeth prey on the minds of four in ten adults, making cosmetic issues the most prevalent oral health concern.
- Sensitivity is also a concern for almost four in ten adults and around a third of the population are concerned about plaque build up, cavities and gum problems, in that order. Today's diets - whether fruit filled and healthy or more indulgent and peppered with sweet treats - damage teeth.
- Dentists' recommendations are persuasive for three in ten adults when buying toothpaste or toothbrushes, although brand reputation is a more important driver of toothpaste choice for four in ten.
- Research also shows that one in five adults only change their toothbrush when absolutely necessary, when its bristles are bent for example. Encouraging more frequent replacement of brushes is one growth opportunity for manufacturers therefore.
- Representing a relatively small proportion of sales, ancillaries also offer significant opportunities for growth. Steadily increasing sales of mouthwash suggest consumers are widening their personal oral care product portfolios so it is possible that additional care steps - such as flossing- could be added on a more regular basis.
- Traditional advertising, promotional activities and low prices have little impact on consumer purchasing choices; just over one in ten are influenced by cheap prices. Hygienists recommendations influence a similar proportion.

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