Buying behavior of toothpaste in Urban India: A study on Pune city

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Toothpaste industry is a big market in India. Toothpastes form an important item in the monthly grocery shopping of most of the urban households. In earlier times, consumers especially in India relied on using the traditional substances like Neem twigs or Mishri (Tobacco containing teeth cleaning powder) for keeping their teeth clean and healthy. But slowly international brands started replacing the older methods of maintaining oral hygiene. Earlier consumers were negligent of their oral hygiene and even didn't care to see a dentist for their oral health problems. However, the trend is changing and now a day's dental advice is also considered an important factor while making a purchase decision of the toothpaste brand, at least in urban markets. Today's consumer has a wide variety of choice in terms of toothpaste brands. Toothpastes from paste form, to gel and powder form are present in the market catering to needs of all the segments. Also a lot of herbal and medicated toothpastes having natural and anti –sensitivity properties are creating niches for themselves in the market space. This descriptive study mainly focuses on understanding the external factors like demographic, social, product attributes and other external influencers which impact consumer decision making process for buying toothpaste. The method adopted for conducting survey is questionnaire; using non probability convenience sampling technique for gathering information from consumers.

Keywords: Toothpaste, Neem, Consumers, Oral, Purchase, Niches, Demographic

Introduction

Marketers had long back noted that consumer did not always act or react, as marketing theory would suggest. Consumer behavior emerged as a stream of management which dealt with the way a consumer goes about making a decision to purchase various products. Selection of an action from two or more alternative choices is termed as a decision. "Consumer purchase decision" involves decision to purchase the goods from the available alternative choice. The various available options to the consumer can be classified into five main types of decisions. They are what to buy, how much to buy, where to buy, when to buy, how to buy. The people who impact the buying decisions may be classified as the initiator, influencer, decider, buyer and users. The size of the consumer market in the country was vast and constantly expanding with 27millions of dollars being spent on goods and services by millions of people. Consumer preferences are changing and becoming highly diversified. The needs of the consumer which have to be fulfilled, the alternatives existing, the product and brand choices they have and the post buying behavior of the consumers need to be studied for an effective marketing strategy.

The Indian Fast Moving Consumer Goods (FMCG) industry began to shape during the last fifty odd years. The FMCG sector is a cornerstone of the Indian economy. This sector touches every aspect of human life. Indian FMCG market has been divided for a long time between the organized sector and the unorganized sector. Unlike the US market for FMCG which is dominated by a handful of global players, India's Rs. 460 billion FMCG market remains highly fragmented with roughly half the market going to unbranded , unpackaged home made products. This presents a tremendous opportunity for makers of branded products who can convert consumers to buy branded products.

Toothpaste forms a regular item in the grocery shopping list for monthly or bi-monthly purchases; the price forms an important factor. A lot of options are available to the consumers today in terms of the toothpastes brands ranging from different variants of Colgate which is designed to cater to the needs of all the segments from youths to the older generation, Pepsodent, Close-up which comes in a gel form used by youngsters to give a long lasting freshness, Anchor which claims itself to be the 1st vegetarian toothpaste ,Dabur, which comes in a powder form Sensodyne and other fluoridated toothpastes which are basically used for anti sensitivity purposes.

Urban India is, in itself, on the way to becoming a major world market. Many companies are focusing their activities in India specifically on urban areas because of the greater accessibility of those markets. Thus urban consumption growth rather than overall growth is, for many companies, the most significant measure of the future Indian consumer opportunity. Over the

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past decade aggregate urban consumption has grown by 6.2 percent, outpacing GDP growth. According to Mckinsey report of 2007, it is expected that urban consumption would accelerate and continue to grow faster than the overall economy, and forecast a compound annual growth of 9.4 percent over the next 20 years. If incomes follow this growth path, then average annual spending per urban Indian household will more than triple from 115,620 Indian rupees annually today to 378,170 Indian rupees in 2025. As household spending rises, the urban market will expand from 7,208 billion Indian rupees ($158 billion) to 43,120 billion Indian rupees ($944 billion) by 2025. At that point, the urban Indian market will exceed the size of France's total consumer market today.

Apart from dramatic income growth, one of the main drivers of the rising urban market is the rapid growth in urban population. Nearly two-thirds of the total increase in population in India over the next two decades will occur in urban India. In addition, continued internal migration into urban areas will mean that the share of the country's population in urban areas will rise from 29 percent today to 37 percent in 2025. The combination of births and migration will raise the urban population from 318 million today to 523 million by 2025. Urban India today is already more populous than the entire United States; by 2025, it will exceed the current population of the EU. Rich urban households in India will have spending habits similar to those of their developed-country counterparts—branded apparel, vacations abroad, electronics, and cars will all be high-priority purchases. Finally, another attractive aspect of this target segment will be its geographical concentration. Today 60 percent of urban global households live in the top eight cities of the country (Delhi, Mumbai, Kolkata, Chennai, Bangalore, Hyderabad, Ahmadabad and Pune), making them a relatively more visible and easily targeted segment than the other income bands. Consumers in India are set to drive growth, thanks to rising awareness of the importance of oral hygiene and improving income levels. Consumers are switching from traditional, homemade solutions such as datum, mishri and neem leaves to using toothbrushes and toothpaste.

Urban consumers are changing their toothbrushes more regularly than before, in line with dentists' recommendations, due to rising oral hygiene awareness. Consumers became increasingly willing to spend money on ensuring dental health, with many seeking toothpaste that, in addition to cleansing and freshening, offers health benefits. A notable trend in 2010 was the increasing preference of consumers in India for herbal and ayurvedic-based toothpastes. These are perceived to be more “natural” than standard products, and herbal and ayurvedic-based toothpastes saw increasing traction in 2010, as consumers veered toward oral care alternatives perceived as more natural or healthy.

Rationale

According to Euromonitor International, the global oral care market experienced stable growth from 2005 to 2010, with a value compound annual growth rate of 4.6%, using current/nominal prices and fixed exchange rates. Up until 2010, the category had survived the global economic downturn, and as the global economy slowly recovers, growth of the oral care category is expected to increase to 5.2% and remain close to that over the forecast period through 2015. This growth will be driven by product innovations, value-added products and the strong growth of markets in developing countries—as well as the fact that oral care, by nature, is one of the most essential beauty and personal care categories.

Looking for Innovations in the global oral care market, regions with developed and saturated markets (i.e. the U.S., Japan, Germany and the U.K.) are expected to show little growth, and those with unsaturated markets and growing populations (such as China, Brazil and India) have clear growth potential. Increasing frequency of usage, especially for toothpaste and toothbrushes, is driving this growth. Stronger hygiene awareness, pushed by major brands and many governments, is encouraging more frequent brushing of teeth, the usage of toothpaste when brushing and also the frequency of toothbrush replacement. In addition, growing middle-class consumer bases in all these countries are further driving demand for oral care products. Growth opportunities in these two general types of markets will be realized in different ways: In the developed markets, consumers look for innovations, while developing market consumers trade up to better products.

Brand owners are focusing on ways to stand out against the competition by providing newer and better products with new product formulations, “innovations” and marketing campaigns. In developing markets, brand owners focus their efforts on educating consumers on the benefits of traditional oral health and the products to support that. As a result, places such as India are seeing dramatic growth in the penetration of oral care as more consumers trade up from toothpowder to toothpaste and expand their oral care regimens to include mouthwashes/dental rinses.

In India, oral care market offers huge potential as penetration and per capita consumption of oral care products is very low. However, rising per capita income and increasing awareness is driving demand of oral care products. Consumers have started switching to value-added toothpastes like gels, mouth washes, and teeth whitening products. In rural areas, consumers are switching from toothpowders to toothpastes. A key industry trend is the move towards natural products comprising of herbs, vitamins and minerals.

Oral care market in India which accounts for about 16% of the overall personal care market is witnessing growth with a fair share of national and regional players. Value-added products are gaining popularity especially in the urban areas.

Future trend:

Specialty dental clinics and pharmacies that cater specifically for dental requirements are set to become more popular in the coming years

Value-added oral care products like mouthwash, dental floss, teeth whiteners are expected to drive the oral care market

Objectives

a. To study the factors that influences the buyers to buy different toothpaste(s).

b. To examine the brand awareness for various brands and the attributes and influencers impacting purchase decision.

c. To study the impact of consumer promotions and factors influencing switching behavior.

Literature review

Consumer Personality Factors

There are two factors mainly influencing the consumers for decision making: Risk aversion and innovativeness. Risk aversion is a measure of how much consumers need to be certain and sure of what they are purchasing (Donthu and Gilliland, 1996).Highly risk adverse consumers need to be very certain about what they are buying. Whereas less risk adverse consumers can tolerate some risk and uncertainty in their purchases. The second variable, innovativeness, is a global measure which captures the degree to which consumers are willing to take chances and experiment with new ways of doing things (Donthu and Gilliand, 1996).The shopping motivation literature is abound with various measures of individual characteristics (e.g., innovative, venturesome, cosmopolitan, variety seeking), therefore, innovativeness and risk aversion were included in this study to capture several of these traits. Measures by Donthu and Gilliland (1996) were used to measure innovativeness and risk aversion.

Product type

Past research indicates that consumers purchase and channel decisions might be influenced by the type of product being investigated (Cox and Rich 1964:Lumpkin and Hawes 1985;Morrison and Roberts 1998:Papadopoulos 1980:Prasad 1975:Sheth 1983: Thompson 1971).In particular ,these authors stated certain products might be more appropriate for one channel or another, which ultimately influences consumers channel preference and choice.

Product Class knowledge

Product class knowledge is a measure of consumers perceptions of how much they know about a specific class of products (eg. cars)This type of measure is consistent with what Brucks(1985) called subjective knowledge, that is, consumers self-perceptions of knowledge levels. This is often contrasted with objective knowledge, which is what consumers actually know. Park and Lessing (1981) proposed that subjective knowledge provides a better understanding of consumers decision making processes because consumers level of confidence in their search and decision making behavior, independent of their objective knowledge.

Quality

It is our aim to provide the best product for the consumer and we believe that if the products have quality the consumer will pay the price, says Amal pramanic, regional business director Oral-B

Perception

Perception is a mental process, whereby an individual selects data or information from the environment, organizes it and then draws significance or meaning from it. Perceived fit is an attitudinal measure of how appropriate a certain channel of distribution is for a specific product .Morrison and Roberts (1998) found that consumer's perception of the fit between a service/product and a channel is very influential in determining whether they will consider using that channel for a specific service. In fact, perceived fit was found to be more important than consumer's preferences for the distribution method or service.

Packaging

Packaging establishes a direct link with the consumers at the point of purchase as it can very well change the perceptions they have for a particular brand. A product has to draw the attention of the consumers through an outstanding packaging design. Earlier packaging was considered only a container to put a product in, but today, research in to the right packaging is beginning at the product development stage itself. Packaging innovation has been at the heart of Dabur's attempt to rap with the urban consumers. It spends large sums annually on packaging research.-"We have been laying emphasis on aesthetics, shelf appeal and convenience for consumer'" says Deepak Manchandra, manager packaging development

Familiarity with a channel

Consumer's familiarity with a channel is a measure of the general experience they have with purchasing products through specific channels (i.e.. catalog, internet, and bricks-and-mortar retailer). Through frequent use consumers should become accustomed to using the channel, which reduces their apprehension and anxiety in purchasing products through the channel.

Brand Awareness

According to Rossiter and Prey (1987), brand awareness precedes all other steps in the buying process. A brand attitude cannot be performed, unless a consumer is aware of the brand. In memory theory, brand awareness is positioned as a vital first step in building the bundle of associations which are attached to the brand in memory (Stokes, 1985).

Family influence

A family exerts a complex influence on the behaviors of its members. Prior family influence research has focused on intergenerational rather than intergenerational influence in consumer generationalisation. As has been compellingly demonstrated, parents influence children (Moore, Wilkie, and Lutz2002; Moschis 1987).Yet, consumption domains clearly exist where sibling efforts may also be exerted.

Research methodology

The descriptive study was carried out by interviewing 250 consumers spread across various parts of Pune city based on non-probability convenience sampling method using online survey instrument over the period of two months. The prime objective of the study was to understand the buying behavior in choosing toothpaste and demographic factors which influence these behavior(s). The respondents selected for the study were chosen on the basis of demographic variables like age, income, profession, gender and education (refer table 1). The main reason for choosing these variables was to get overall representation of the population. Among the 250 consumers, 125 were male and 125 were female. These were further classified into four groups based on their profession into Student, Professional, Businessmen and Housewives. The age of these four groups ranged between 18 – 30> years. Data was transferred to excel for analysis. The tools used for data analysis include, Cross Tabulation and Chi Square.

Data Analysis

Hypothesis

Ho: Educational background impacts usage rate of toothpaste.

Conclusion and analysis: The chi-square test revealed the significant association between the educational background of respondents and their usage of toothpaste. From the Chi-square output we see that a significance level of 0.0878(Pearson's) has been achieved. This means that Chi-square test is showing significant association between the above two variables at 91.22% confidence level (100-8.78). Thus we conclude that at 90% confidence level, Educational background impacts usage rate of toothpaste.

Ho: There is a relationship between gender (independent variable) and choice of a toothpaste brand (dependent variable).

Conclusion and analysis: The chi-square test revealed that there is no significant relationship between gender of the respondents and their choice of brand. From the Chi-square output we see that a significance level of 0.020(Pearson's) has been achieved. This means that Chi-square test is showing insignificant association between the above two variables at 90% confidence level (100-2.00). Thus we conclude that at 90% confidence level, gender does not impact choice of a toothpaste brand.

Table no.1

Age (Years)	Number of respondents	Percentage
<18yrs	50	20
18-25	80	32
25-30	50	20
30 and above	70	28
Total	250	100
Gender		
Male	125	50
Female	125	50
Total	250	100
Education		
Up to 10th	55	22
Up to 12th	65	26
Graduation	80	32
Post graduation	50	20
Total	250	100
Profession		
Student	70	28
Professional	75	30
Businessman	45	18
Housewife	60	24
Total	250	100
Income(INR)		
<5000	70	28
5000-10000	55	22
10000-15000	60	24
15000-20000	40	16
>20000	25	10
Total	250	100

Source: Field survey

The respondents selected for the study were chosen on the basis of demographic variables like age, income, profession, gender and education (refer table 1). The main reason for choosing these variables was to get overall representation of the population.

Table no.2 Toothpaste usage rate

Usage rate	Number of Respondents	Percentage
Yes	230	92
No	20	08
Total	250	100

Source: Field survey

From the above data given in table no. 2, it has been found that 92% of the respondents in Pune city use toothpaste in various available forms while 8% of respondents use toothpowder and other traditional methods of oral care.

Table no.3 Consumer brushing pattern

Brushing frequency/day	Number of Respondents	Percentage
Once	180	72
Twice	60	24
Thrice	10	04
Total	250	100

Source: Field survey

After analyzing the consumer brushing frequency/day the data given in table no.3 reveals that 72% of the respondents prefer to brush only once, 24% of the respondents brush twice, and 4%brush thrice in a day. So the frequency of brushing was less, while ideally consumers should be brushing 2 times daily for avoiding dental problems. It has been found that relatively Indian people do not give as much importance to oral care, so the share of oral care industry is less in India when compared to other developing countries. However, we see a lot of changing perception on importance of oral hygiene among younger generation.

Table no.4 Quantity of Purchase

Per Month Quantity	Number of Respondents	Percentage
50gms	35	14
100gms	85	34
250gms	110	44
500gms	20	08
Total	250	100

Source: Field survey

From the table no.4 we can infer that 44% of respondents preferred to buy 250gms pack for their family consumption while 34% respondents preferred 100gms pack. The preference for 50gms and 500gms was 14% and 8% respectively. Thus we can conclude that 250gms packs are most preferred packaging among respondents followed by 100gms package.

Table no.5 Frequency of Purchase

Purchase per Month	Number of Respondents	Percentage
Once	210	84
Twice	35	14
Thrice	05	02
Total	250	100

Source: Field survey

The data pertaining to frequency of purchase is presented in the table no.5. On examining the table the data reveals that 84% of the respondents prefer to buy toothpaste once a month, 14% prefer to buy twice a month, and only 2% prefer to buy thrice a month.

Table no.6 Brand Awareness

Brands	Number of Respondents	Percentage
Colgate	85	34
Pepsodent	65	26
Close-up	40	16
Dabur	15	06
Anchor	18	7.2
Babool	15	06
Others	12	4.8
Total	250	100

Source: Field survey

With a view to find that awareness of toothpaste brand, the data pertaining to this is presented in table no.6. An examination of the above data reveals that most of the people are aware of Colgate, Pepsodent, Close-up, Anchor, Dabur and Babool. Before some time back Colgate was considered as a generic name for toothpaste, this was the main reason for most of the respondents (34%) to be aware of Colgate. While 26% respondents were aware of Pepsodent followed by 16% awareness for Close-up, Anchor, Dabur and Babool are Indian based brands having awareness level of 7.2%, 6%, and 6% respectively. Respondents being aware of traditional substances are less with 4.8% indicating increasing awareness in toothpaste category is always for a heavily advertised toothpaste brands.

Table no.7 Parameters for selection of brands

Selection	Number of Respondents	Percentage
Brand	70	28
Quality	50	20
Price	45	18
Freshness	40	16
Flavor	10	04
Offers	30	12
Style of Packing	05	02
Total	250	100

Source: Field survey

The data pertaining to selection of brands is presented in the above table no.7. The data reveals that, 28% of respondents selected toothpaste on the basis of brand name, 20% on the basis of quality, 18% on the basis of price, 16% on freshness, 12% on the basis of sales offers and remaining 4% and 2% on the basis of flavor and packaging. Brand name and perceived quality played a vital role in selection of toothpaste in Pune.

Table no.8 Major Influencers while making purchase

Factors	Percentage
Family	20
Friends	25
Advertisements	25
Dentist	12
Self-experience	13
Schemes	05
Total	100

Source: Field survey

The data pertaining to major influencers while making purchase decision is presented above in table no.8, regular exposure to advertisements and peer pressure of using the product was major influencers while indulging in the purchase. Apart from this, influence of the family, self-experience and advise of the dentist played role while buying their preferred brand.

Table no.9 Attributes preferred in toothpaste

Attribute	Number of Respondents	Percentage
Cleansing	40	16
Herbal ingredients	35	14
Freshness	25	10
Prevention of tooth decay	55	22
Foam	10	04
Health benefits	85	34
Total	250	100

Source: Field survey

The data from the above table no.9 clearly reveals that health benefits and prevention of tooth decay are the major attributes preferred while buying a toothpaste brand. Cleansing, herbal ingredients and freshness are other attributes preferred. Foaming was the least expected attribute for toothpaste.

Table no.10 Promotion tools which impact buying

Promotion tools	Number of Respondents	Percentage
Samples	76	30.4
Coupons	44	17.6
Gifts	10	4.0
Price-offs	52	20.8
Bonus packs	68	27.2
Total	250	100

Source: Field survey

The data from the table no.10 reveals the importance of consumer promotion tools especially while promoting a FMCG product like toothpaste. Samples and bonus pack were the most preferred promotion tools offered by companies. Price-offs and coupons and gifts were other tools preferred by respondents.

Table no.11 marketing elements which attract toothpaste buying

Marketing elements	Number of Respondents	Percentage
Celebrity endorsements	86	34.4
Advertisement	57	22.8
Sales promotions	53	21.2
Recommendation of professional bodies	30	12.0
Pricing	24	9.6
Total	250	100

Source: Field survey

The date from the table no.11 above was captured to understand marketing elements which are critical while using marketing strategy for selling FMCG product like toothpaste to consumers. Celebrity endorsement was the most impactful mode of attracting consumers to buy or try a toothpaste brand. Advertisement, sales promotion and recommendations of professional bodies are other marketing elements which impact toothpaste buying. Pricing in spite of being an important marketing mix, is not a major selection criteria in an urban city.

Table no.12 switching behavior

Reason for changing brands	Number of Respondents	Percentage
Promotional offers	87	34.8
Increase in price	17	6.8
Like switching brands	15	6.0
Short supply of brand	10	4.0
Advertisement	47	18.8
Retailer influence	53	21.2
vegetarian toothpaste	35	14.0
Total	250	100

Source: Field survey

The data from the above table no.12 was meant for capturing information on switching behavior and reasons for change of existing brand. Promotional offers and retailer influence was the main reason for switching behavior seen for change in toothpaste brand. Advertisement and vegetarian toothpaste were other reasons for change in brands. Price rise, switching brands occasionally and short supply were the least preferred reasons for change of brands.

Limitations of Study

The limitation contained in the primary data was that of limited sample size used for study, thus sample cannot be correct representation of the target. Moreover consumer buying is a complex process in which number of factors like economic factors, social status and psychographic factors influence the buying of the consumer, those are not considered for the study.

Conclusion

It is very difficult to predict consumer behavior. Consumer research can to some extent solve this problem. Normally, companies concentrate on only analyzing the requirements of consumers and also strategies to retain them. This study was conducted to understand behavior and motives of consumers in India for buying toothpaste.

There is a huge potential for Oral care market in India as penetration and per capita consumption of oral care product is very low. With rising per capita income and better awareness there is an increasing demand seen for oral care products. Many people in India still clean their teeth with traditional products like Neem twigs, salt, ash, tobacco or other traditional substances. The average all India per capita consumption of toothpaste stands at dismal 82gms.The dentist to population ratio is an abysmally low at 1:35000 in the country. All this has contributed to low oral hygiene consciousness and widespread dental diseases. Less than 15% of the Indian toothpaste users brush twice a day.

Government of India has taken initiatives like conducting dental health camps for promoting the product consumption and creating awareness among common people on benefits of maintaining oral hygiene. Toothpaste manufactures use advertising campaigns to promote higher consumption of toothpaste. Brand image, advertising, and sales promotions play an important role in purchasing toothpaste while helping the consumers in comparing with competitor product and selecting the best one. Product attributes are also analyzed by the consumer for zeroing down on specific brand. Consumers switch from one product to other product based on advertisement, brand name, packaging availability, and price changes, etc. Moreover, Indian consumers have high degree of family orientation, which extends to even extended family and friends. Brands with identities which support family values tend to be popular and accepted easily in Indian market. Therefore companies need to analyze all these factors and find out the best suitable tools and cultural orientations for promoting their toothpaste brands in India.

After economic liberalization of 1990s, Indian markets have borne witness to dramatic shifts in the structures triggered by sharp changes in the lifestyle patterns impacted by technology. Time tested concepts like mass marketing and brand loyalty, are being tested as they fail to gauge the behavior of new generation customers. The behavior has been characterized by the uniqueness of individual expectations, preference for multiple options, increasing propensity to abandon loyalty and switch to competitive brands that have higher (perceived) value. The new generation consumers don't mind buying imported products that can satisfy their specific requirement. In such a scenario, it has become difficult to classify the consumers by conventional demographic factors.

On the other hand, unless their thinking process and buying behavior are fully understood, decisions on packaging and product designs, branding and distribution channels are likely to be misplaced. Indian companies must learn from other developed markets; not only to identify the sources, timing and direction of the changes likely to affect them, but also the new competencies and perspective that will enable them to respond to these changes, comprehensively and effectively. In order to survive, companies offering product(s) or services will need to understand this new paradigm of changing consumers.

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