



## The State of Oral Health Report for South Africa

Oral-B has been a familiar brand for generations thanks to its efforts to improve oral health the world over. The scientists behind the brand are responsible for many advances in the field of oral health, including the introduction of sodium fluoride in toothpaste and the development of the world's leading range of toothbrushes.

The brand's ethos, and to a large extent its success, is grounded in its thorough understanding and appreciation of the consumers it serves: their needs, attitudes and behaviours. The following report, conducted with global research partner TNS, is one example of such activity.

Oral-B's aim in conducting this report was to garner a deeper understanding of the true state of oral health in South Africa from three perspectives: how important oral health is to South Africans, the personal and economic implications of poor oral health, and whether current behaviours and levels of personal care are proportionally sufficient.

Anecdotal evidence and testimonies offered in focus groups suggest that although South Africans believe that good oral health is both important and an attractive trait in others, current levels of care are insufficient. This report aims to shine a light on that disparity in order to shake complacency and inspire better self-care, but also to congratulate and encourage the population in the esteem in which they hold good oral health and help find relevant ways to assist them in their goals.

### Key Findings

- **Oral Health is important to South Africans but engagement in the category is low:** Despite 98% of South Africans claiming their oral health is important, almost two thirds (64%) choose a toothpaste without researching the benefits. Habit, not research, dictates their toothpaste purchasing
- **The prevalence of oral health issues among South Africans is high and the resultant implications are not limited to the patient's mouth:** An astonishing 94% of South Africans have suffered from an oral health problem at some point and they could spend R13,375 over the course of their lifetime resolving preventable oral health problems and missing work hours
- **The majority would be willing to spend more money on a toothpaste that was scientifically proven to be better than what they currently use:** While the majority of consumers (59%) believe they are using the best product for their oral care needs, the prevalence of oral care issues leaves most South Africans open to trying something new should it be proven to be better or recommended by their dentist.



## Executive Summary

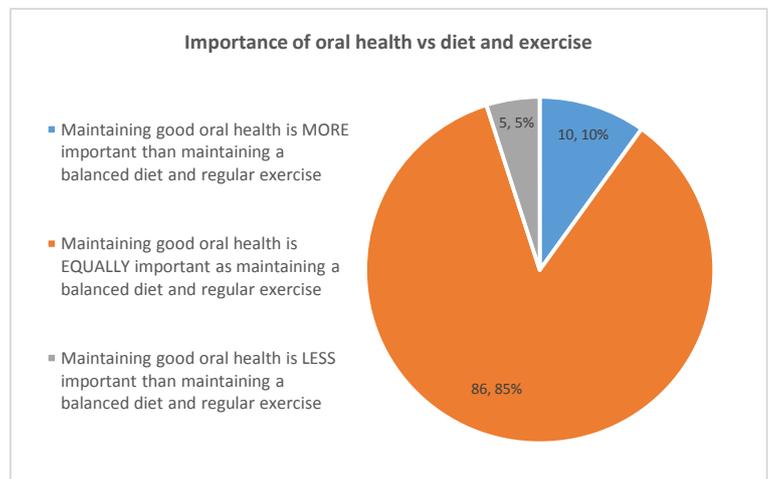
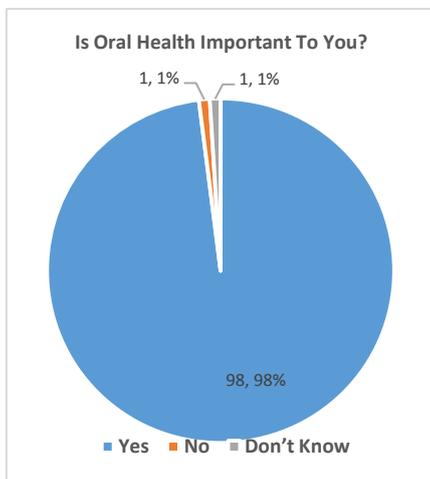
- South Africans highly value their oral health and perceive the maintenance of good oral health to be as important as diet and exercise.
  - 98% of South Africans say they value good oral health highly
  - 96% of South Africans say that maintaining good oral health is as important as maintaining a balanced diet and taking regular exercise
- The data shows that South Africans could be doing more to improve and protect the health of their mouth and that poor oral health has implications beyond the conditions of their mouth
  - 69% of South Africans have suffered a preventable oral health problem in the last year
  - 39% of South Africans have taken time off work in the past year for preventable oral care issues
  - The average South African will spend R13,375.50 in their lifetime resolving preventable oral health problems
  - South African women spend 3x longer researching a face cream than researching the toothpaste that is best for their families' health
- South Africans are prepared to spend more for better oral health
  - Choice of toothpaste is most frequently based on habit versus recommendation or research yet the majority of consumers believe they are using the best product on the market
  - In spite of this, 88% would be prepared to spend more money on a toothpaste that was scientifically proven to protect our family's oral health better than our current toothpaste

## Chapter 1 - Importance of Oral Health

Having good oral health is overwhelmingly important to South Africans. Almost all (98%) respondents said that oral health is important to them. Furthermore, 96% said that maintaining good oral health is at least, if not more, important than maintaining a balanced diet and regular exercise.

Oral health also plays an important part in one's self-confidence as the majority (74%) of respondents said they believed that improving their oral health would make them feel much more self-confident. In fact, tooth loss is second only to weight gain in consumers' concerns about their own appearance

Similar attitudes were expressed towards others with oral health issues. South Africans are more likely to notice and are more likely to be attracted to a new person's smile than any other attribute and 17% believe that tooth loss is the biggest sign that a person is neglecting their wellbeing.



## Chapter 2 – Current State of Oral Health

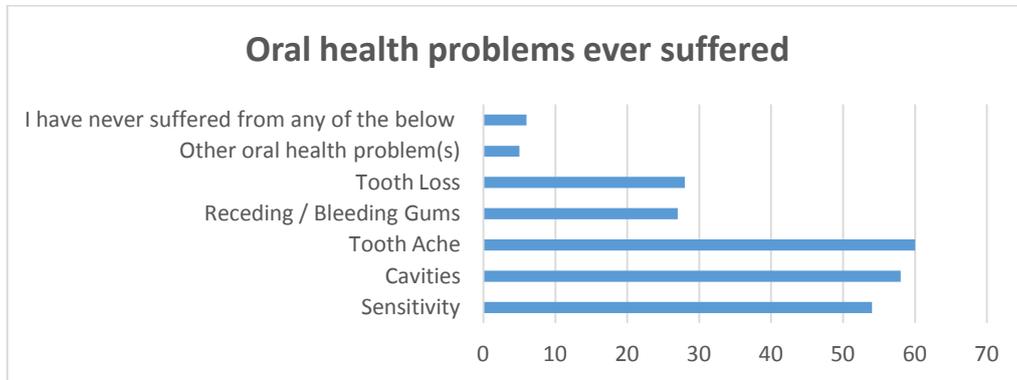
When asked if they had ever suffered from any common oral health problems, nearly all respondents (94%) have indeed experienced these issues. From a list including sensitivity, cavities, tooth ache, receding or bleeding gums, tooth loss or other issues, only 6% answered that they had not, with 69% saying that they had experienced at least one of the listed issues in the last 12 months. The most common issues experienced in the last year were sensitivity (25%), tooth ache (19%) and cavities (15%). Even with such a prevalence of oral care issues, only 56% of South Africans have visited their dentist in the past year.

The cost of putting right such oral health problems can be significant, as the average sum paid in the last year to resolve these largely preventable issues was R339 per person. Over a course of a lifetime, this equates to R13,375 spent reversing issues which could be avoided through better care. In the past year alone, close to 20% of South Africans have paid in excess of R1000 to address their oral care issues.

Preventable oral health issues do not just have an impact on the individual's finances. More than two thirds of respondents have taken off work in the past 12 months due to the symptoms of oral health issues, or to receive treatment, which has implications to employers the economy as a whole.



And although many admit to not brushing or visiting the dentist as frequently as they should, South Africans seem confident that they are taking the best possible care of their teeth, with a majority (88%) claiming they are confident that they are taking the best possible care of their teeth.

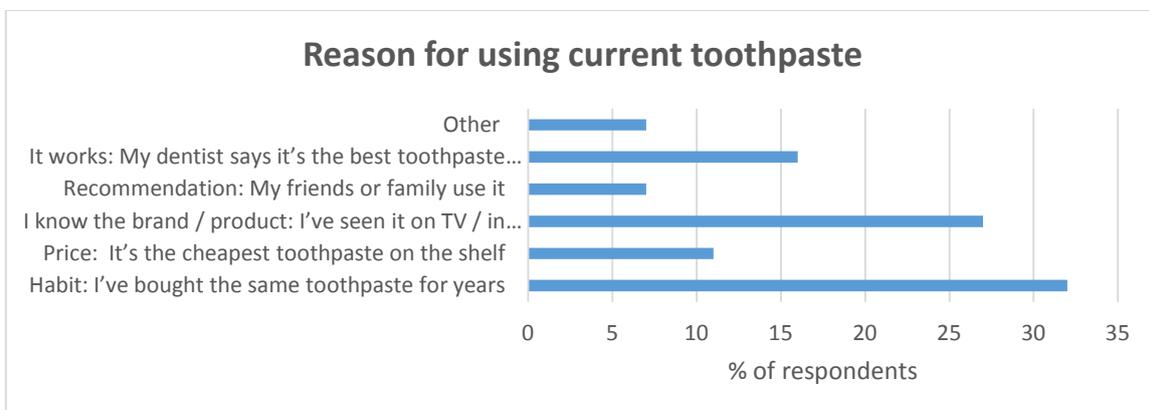


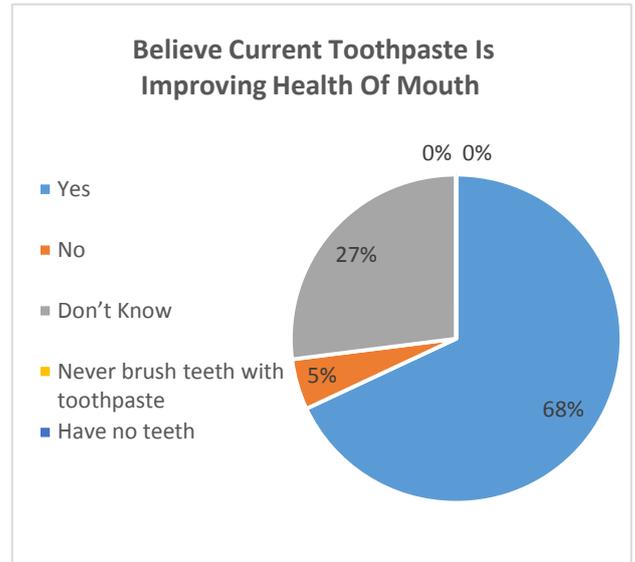
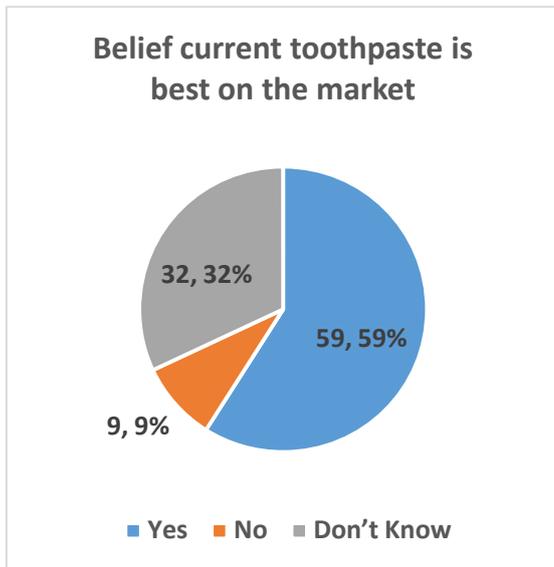
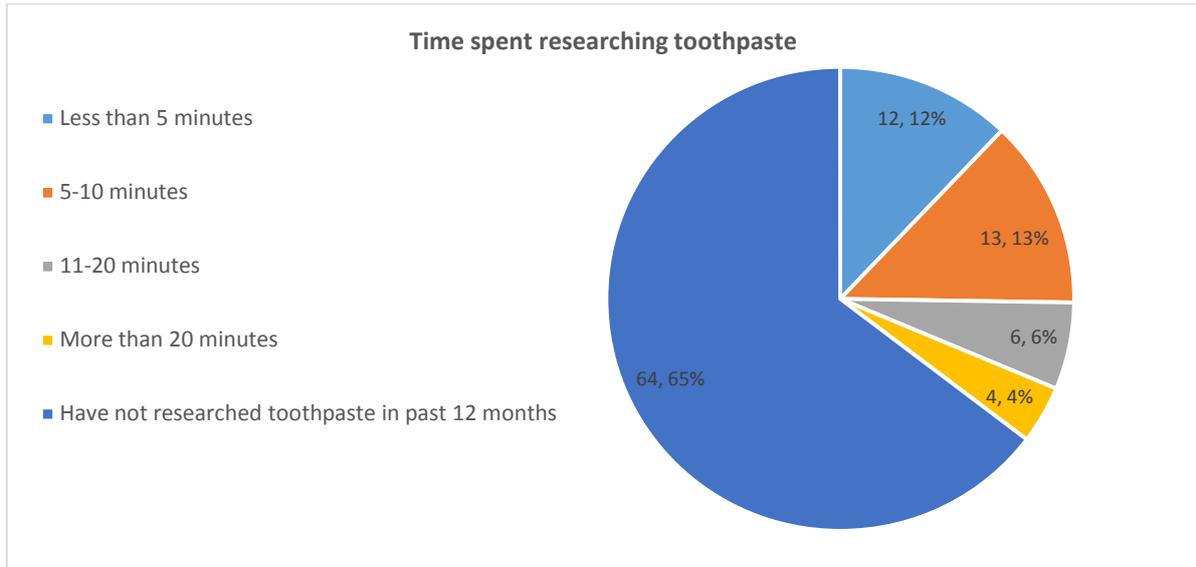
### Chapter 3 - Attitudes and Motivations

In spite of the high frequency of oral health symptoms amongst the population, 59% believe that they are currently using the toothpaste on the market. When asked why they use their current toothpaste the majority state “Habit; I’ve bought the same toothpaste for years”.

Recommendations from friends and family were the least frequented source of information which diverges from the trends seen in other toiletries and personal items where such peer to peer recommendations are common. This perhaps suggests that oral health and oral care in particular are not topics regularly discussed socially in spite of their apparent importance to the sample.

While a majority of consumers are at least somewhat confident that they doing what’s best for their oral health, almost a third of consumers are unsure if their current toothpaste is improving their oral health. A significant 9% said that they were not confident that their toothpaste is the best available, yet continue to use it regardless. Despite this uncertainty, South Africans do not seem to invest a proportionate amount of additional time researching the most appropriate product for their needs. On average, those surveyed spent just 2.32 minutes choosing which toothpaste they should use and 64% say that they have not researched toothpaste at all in the last 12 months.





#### Chapter 4 – Ability to Influence Habits

Despite a low level of engagement in the category, the majority (81%) were at least moderately likely to change brands if dental professional recommended an alternative. And if scientific proof was offered, the majority (88%) would not only be willing to switch products but also to spend more on a toothpaste that was shown to protect their family’s oral health better than their current product.

When asked how much they would be prepared to spend on a tube of toothpaste that was scientifically proven to make their teeth healthier the average price stated was R32.98, compared with the average R23.7 currently spent on toothpaste; a 39% increase.

There is reason to believe that South Africans would be willing to spend more on their oral care products given that 66% of South Africans spend over R50 per month on health supplements, compared to an average spend of just R36 on oral care, even though 41% do not feel any difference with supplement usage.



## Chapter 5 - Comparative Habits

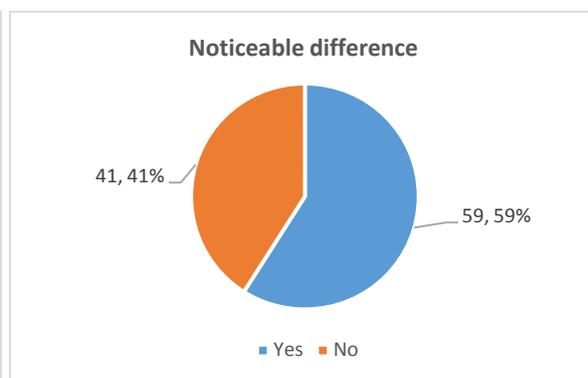
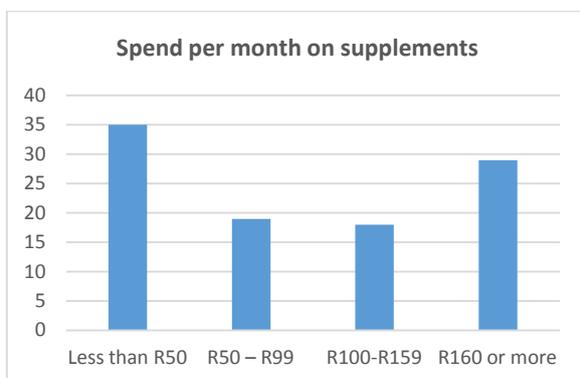
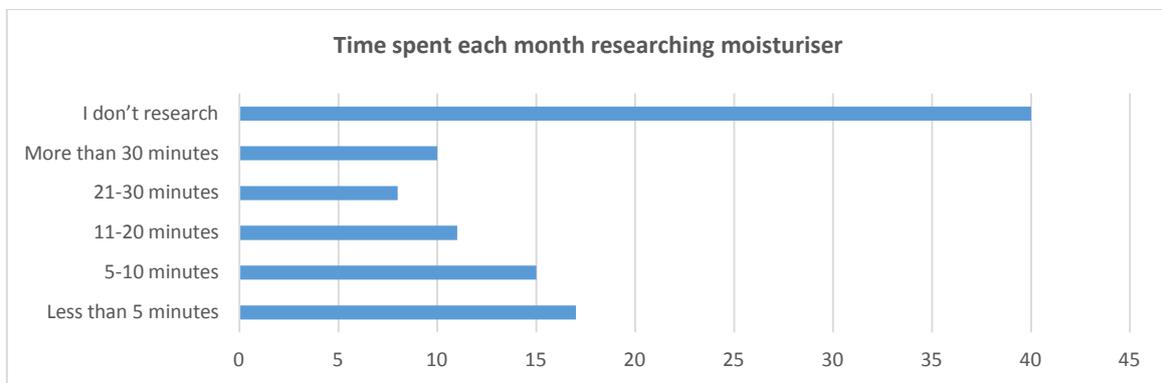
There seems to be an inconsistency between the time and money invested in oral health and the importance South African's claim it plays in their lives. This disparity is most starkly seen when comparing oral health to other areas of consumer health and fitness.

Even though consumers state how important their oral health is to them, and in spite of the impact of a smile in making first impressions, South African women will still spend considerably more on their cosmetics than they do on protecting and maintaining their oral health. 40% of women spend more than R100 each month on make-up products and yet the average total spend on oral care products is just R36.

And although a person's smile seems to have greater significance in attracting a mate than physique, South Africans spend almost five times more on maintaining their personal fitness than they do on their oral care. The average spend on personal fitness is R164.50, a figure which includes all of those who are not members of a gym.

Two thirds of South Africans spend over R50 each month on supplements (compared to an average spend of R36 on oral care) even though only 41% said they felt a noticeable difference after taking these supplements.

Perhaps most significant is the difference between time spent researching the most appropriate face cream compared to the best toothpaste. On average, consumers (including the men) spend 6.81 minutes each month deciding which face cream to buy compared to 2.32 minutes on toothpaste. That is almost three times as long. When looking at the most engaged in each category, one in five women spend more than 20 minutes researching their face cream but only 4% do the same for their toothpaste.





## **Chapter 6: Current Oral Care Habits & Practices**

In one section of the study, participants were asked a series of questions about their current oral health habits, including home care and visits to professionals.

### **Product Usage**

The research suggests that across the demographic groups the importance of brushing teeth regularly with toothpaste is widely understood. 74% of those surveyed adhered to the general recommendation of brushing teeth with toothpaste at least twice a day.

While manual brushes are the most common choice by a significant margin, almost a quarter of the respondents use an electric toothbrush at least some of the time.

### **Visits to the dentist**

While the vast majority say that their oral health is important to them the frequency of dental check-ups is comparatively low. 42% said that they had not visited a dentist in the past 12 months, and furthermore, half of those who did visit a dentist did so because of a specific problem, rather than for a regular check-up.

### **Spend**

On average the participants estimated that they spend R36 each month on their total oral care, including toothpaste, mouthwash, floss and toothbrushes. When asked about individual categories spending averaged at R23.7 on toothpaste, R20.65 on toothbrushes, R10.84 on floss.

### **Survey Method**

**Sample:** This report presents the findings of a nationally representative survey of 1,000 male & female South Africans who live in South Africa & are the primary oral care shoppers, aged 18+.

**Questionnaire dates, method and timing:** All surveys were conducted online & administered by TNS in April 2014.

For more information please contact:

Hannah Robbins [Hannah.robbins@msslgroup.com](mailto:Hannah.robbins@msslgroup.com)