

DCA



Sensodyne Daily Care Toothbrush
A Quality Toothbrush for 30 Rupees

Title: Sensodyne Daily Care Toothbrush
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Client: Sensodyne, GlaxoSmithKline
Design Consultancy: DCA Design
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Executive Summary

There are changes afoot in the Indian oral care market. More and more people are switching to toothpaste and toothbrushes after years of using traditional toothpowder. As a result, the market is growing at pace with significant opportunities for businesses to increase revenue. But there's a major barrier to it growing further – and that's the price of a toothbrush, which is expensive for huge swathes of the population living in poorer, more rural areas of the country.

In particular, sensitivity specialist/soft toothbrushes are even more expensive. Our Sensodyne Daily Care toothbrush, **specifically designed for the Indian market**, eliminates this barrier. Rural consumers can now walk into their neighbourhood store and buy a premium quality toothbrush for sensitive teeth, for as little as **30 rupees** (that's around 30 pence) – a first for the brand owner, GlaxoSmithKline (GSK), in the Indian market. A move that gives Sensodyne access to an entirely new market and **makes better oral hygiene more affordable** for millions more people in India.

We meticulously unpicked the entire process behind the design and manufacture of a toothbrush so we could create one cost effective enough for the thousands of small store owners, scattered across rural India, to sell.

The result is a design process that's **37% faster than a typical toothbrush production** cycle and a toothbrush that, despite being made using **45% less material**, still feels like a toothbrush should. The new Sensodyne Daily Care toothbrush is a featherweight – weighing in at just **9.4 grams, 7.6 grams less than the industry standard** and lighter than GSK's target weight for the design.

More efficient to produce and transport, our design has **delivered crucial cost savings** that GSK is passing on to the consumer at point-of-sale. In the first six months since its launch in November 2017, **an impressive (REDACTED CONFIDENTIAL DATA) million toothbrushes have been sold**, meaning **GSK has exceeded its initial business delivery forecasts four times over**. The new toothbrush is also driving wider distribution for Sensodyne – an important performance measure for the design – **increasing Sensodyne's toothbrush retail outlets by 17%**. Crucially, and as a direct result of the success of the new toothbrush, Sensodyne has increased its share of the toothbrush market, GSK's main business objective behind the project, beating gains made by Sensodyne's incumbent toothbrush range in India, over the same period.

30 Rupees

Retail price of just 30 rupees for the toothbrush

37% Faster

Than a typical toothbrush production cycle

“Feedback from our trade partners is that the product's value proposition – a quality Sensodyne toothbrush at such an affordable price – is attracting our target customers. The overall design package successfully communicates this and is a key driver of successfully helping millions of people manage their tooth sensitivity.”

Ankit Garg, Brand Manager, Sensodyne – India and James Houghton, Global Design Director, Sensodyne

Case Study Overview

Project Brief:

GlaxoSmithKline, owner of the Sensodyne oral care brand, asked us to design a new toothbrush specifically for India. GSK wanted to gain a larger market share in the Indian toothbrush market which is still underdeveloped. To do this, it needed to create a low-cost toothbrush that would attract a new rural and semi-urban consumer to the Sensodyne brand..

The design had to achieve the following:

Encourage the owners of a vast and diverse network of small, independent stores to stock the toothbrush.

These are the type of stores its target, rural consumers regularly shop at, and they only sell low-cost items.

Retain the brand's quality features and design cues, despite retailing at a much lower price than previous Sensodyne toothbrushes.

Persuade target consumers to trial the toothbrush and buy into the Sensodyne brand.

Project Description

Research shows that **37% of consumers in India see price as a barrier to trialling a sensitive toothbrush¹**. Designing a toothbrush to attract these consumers is a huge opportunity for GSK. That's why finding a low-cost way of designing and manufacturing a toothbrush defined our strategic approach to this project. GSK set us the challenge of creating a toothbrush that would

retail at no more than 30 rupees, considerably cheaper than any of its existing toothbrushes on the market. We worked closely with GSK's technical team to find as many efficiencies as possible in the design process so we could stick to this goal. Sensodyne is recognised in India as a quality brand and the design also had to support this positioning through its functionality and form. The aim was for it to be merchandised using a simple point-of-sale hanger, attached to an existing shelf in the store.

To deliver all this we had to consider the following:

It had to be lightweight, weighing no more than 9.5 grams, so we could benefit from the cost efficiencies that come from using less material and faster production.

It must be made of two materials using twin-shot injection moulding to speed up the production cycle and provide a quality hand-grip whilst brushing.

Although lightweight, the toothbrush still needed to look and feel like a recognisable toothbrush in both its length and proportion.

It must also have a 42 tuft-hole head, with 7mil thick bristles and utilise two colours, as expected of a premium toothbrush from GSK.

¹ GSK's own research

Design Solution

The result is a toothbrush that meets all its design criteria: **ergonomic, with a high-quality look and feel** that's tuned for the Indian market and retails at an affordable 30 rupees.

The new toothbrush weighs just 9.4 grams, that's 7.6 grams less than a normal toothbrush and a smidgen lighter than GSK's target weight. We achieved this by **reducing the materials used in construction by 45%**, without compromising on the quality feel of the toothbrush. A scooped-out area on the back of the toothbrush cleverly reduces the material volume without effecting its strength. We used just the right amount of soft touch TPE – the most expensive material commonly used in premium toothbrush design – to give a quality

feel to the handle, but **reduced it by as much as 64%** compared to a typical premium design. Finally, the toothbrush is designed specifically to deliver an **exceptionally rapid manufacturing cycle that's 37% faster than standard**.

The toothbrush comes in four vibrant colours which are relevant to the market and deliver the standout needed in a visually cluttered, grocery retail environment. Sensodyne's visual brand language is clearly communicated, making it a natural extension of the family. The carefully considered material and weight distribution mean the toothbrush is a pleasure to use, providing a reassuring clean that's effective for sensitive teeth.



Four vibrant colours are available

Overview of the Market

Although lifestyle changes are boosting sales of more premium oral care products in urban areas, their penetration in poorer, rural areas remains low. **Only 55% of the Indian population use toothpaste and just 15% brush twice daily**². As awareness of oral health continues to grow, people are looking for alternatives to the less effective toothpowder that they have always used. As a result, sales of toothbrushes are increasing, up by 11% across India and worth approximately £275mn in 2018, as consumers make the switch from traditional products.

Rural India presents a big opportunity for oral care brands. It's relatively underdeveloped but where just over two-thirds of the Indian population live. The challenge comes from persuading rural dwellers to change their oral care habits and trial a more premium product, such as one aimed at sensitive teeth. **A third of people in India suffer with sensitivity**, but only a third of these sufferers do anything about it. **Price is a major barrier** as incomes are low, with 3 out of 4 households earning less than 5000 rupees a month³. Gaining early access to this market could potentially deliver significant market share growth for GSK. Competition at this price point is increasing, and comes from other major global players in oral care such as Colgate and Oral B as well as local brands, Ajay and Patajali.

Influencing Factors

There was no advertising to promote the launch of the new toothbrushes. The toothbrush design had to work hard by itself to catch shopper's attention. A new shelf-ready point-of-sale hanger was created by the GSK Global Design team and the Indian Market team to help shopkeepers display the toothbrushes where ever they wanted to in their stores and clearly signpost the low price. GSK's sales teams also worked hard to sell the new toothbrush into rural stores. The bright colours and premium cues of the toothbrush design mean these wall hangers have worked well, helping store owners to accept the new toothbrush and encouraging customers to trial it. Together, the toothbrushes displayed in the shelf hanger create a simple, distinctive display in the store, which stops them getting lost amongst a cluttered store environment.

Launch

Launch: The Sensodyne Daily Care toothbrush launched in India in November 2017.

Design Fees: (REDACTED CONFIDENTIAL DATA)

² <https://www.forbes.com/site/greastspeculations/2012/06/26/colgate-palmolives-indian-expansion-takes-advantage-of-pgs-pause/#794f9e6681b5>

³ <https://www.indiatoday.in/india/story/india-rural-household-650-millions-live-on-rs-33-per-day-282195-2015-07-13>



Results

A premium toothbrush for 30 rupees.

A key success factor for this project was to produce a lightweight toothbrush with premium features, synonymous with the Sensodyne brand, for just 30 rupees. Through the smart use of materials and innovative design we have hit this target for GSK:

As a direct result of it's more efficient, lightweight design, the Sensodyne Daily Care Toothbrush has far exceeded its launch targets and business objectives. We believe the evidence below helps to prove that we've created a great value toothbrush that's encouraging people to change their oral hygiene routine. It's succeeded in opening a whole new market for GSK and establishing the Sensodyne brand with a new segment of consumers in India.

We reduced the amount of material used by 45% compared to a typical toothbrush;

It's widened Sensodyne's toothbrush distribution outlets by 17%

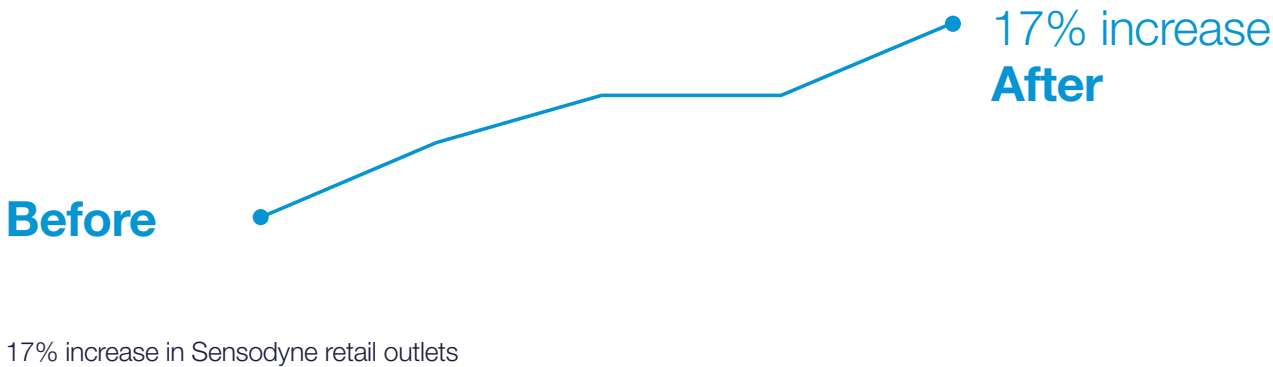
We created a toothbrush that's 37% faster than the standard toothbrush cycle;

Getting owners of small stores to stock the toothbrush was crucial to success. This is where rural consumers regularly shop. For them to agree to sell the toothbrush it needed to be both attractive and affordable. Data shows the design has more than met this objective, driving wider distribution for the Sensodyne brand. Since its launch in November 2017, (REDACTED CONFIDENTIAL DATA) retailers in India now stock the new Sensodyne Daily Care toothbrush. Half of these outlets are new to Sensodyne; smaller stores, selling the toothbrush for the first time on the strength of its design and lower price point.

We created a toothbrush that's nearly half the weight of a normal toothbrush - lighter than its target weight of 9.5 grams.

Gains in Distribution for Sensodyne Toothbrush Portfolio in India

Number of new outlets added since launch of new Daily Care Toothbrush.



Source: GSK Internal Sales LE 2018, A.C Nielsen

Results

Encouraging millions of consumers to trial the toothbrush

Persuading people to spend a portion of their weekly household income on a toothbrush in rural India was always going to be a challenge. It's one that the new design has met head on. Sales figures show that just in the first six months since launch, an impressive (REDACTED CONFIDENTIAL DATA) million toothbrushes were sold. For the whole of 2018, GSK is on track to sell (REDACTED CONFIDENTIAL DATA) million Daily Care toothbrushes. That's half as many as Sensodyne Sensitive, Sensodyne's largest toothbrush by volume sales in India, launched in 2012. **It means that Daily Care has sold 50% of the volume of a six-year-old, well established product**, in just one year. This has smashed GSK's delivery forecast for the new toothbrush, with **the value of actual deliveries 4 times higher than estimated for the year to date**.

And increasing market share for Sensodyne in India

Because of the new toothbrush, **Sensodyne has increased its share of the toothbrush market in**

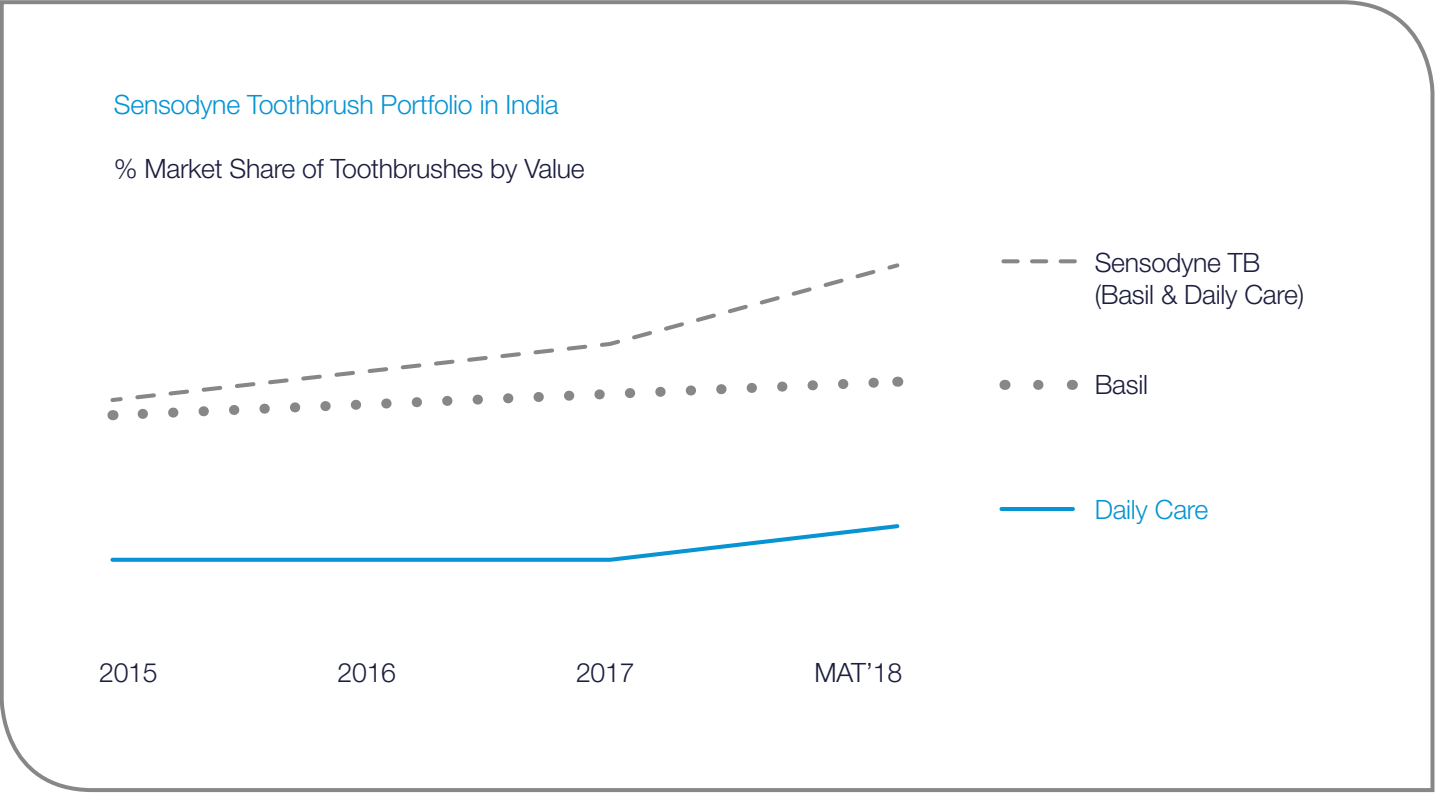
India, a main business objective for GSK through this particular project.

Since the launch of Sensodyne Daily Care Toothbrush in November 2017, Sensodyne's portfolio gain has been (REDACTED CONFIDENTIAL DATA) but Daily Care has gained (REDACTED CONFIDENTIAL DATA). There were no other product launches in 2018 to drive market share.

This is significantly more than the market share gain of Sensodyne Sensitive, Sensodyne's biggest and most established toothbrush in India, over the same period.

It's also twice the gain made by Sensodyne's portfolio in the year prior to the launch of the Sensodyne Daily Care toothbrush, when its share of the market grew by 0.5%.

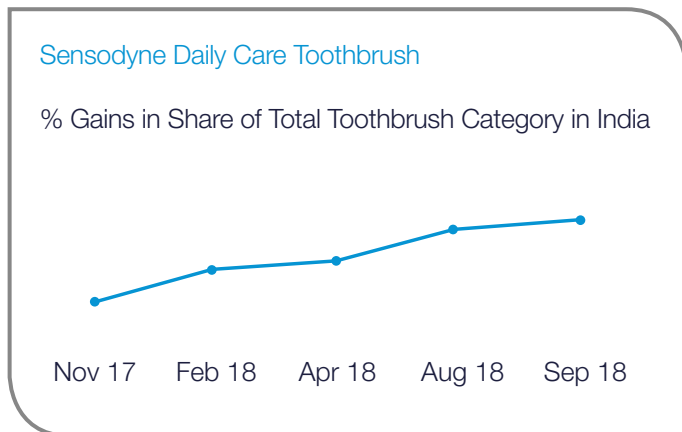
Sensodyne's new Daily Care toothbrush, by itself, has claimed (REDACTED CONFIDENTIAL DATA) of the market in its first year, in a fragmented category where several economy products from both global and local brands are now vying for market share.



Source: GSK Internal Sales LE 2018, A.C Nielsen

Results

Each month since launch, Sensodyne's new Daily Care toothbrush has been going from strength-to-strength, with market share gains gradually improving. GSK's internal sales figures show that in November 2017, the just launched toothbrush made a (REDACTED CONFIDENTIAL DATA) gain in market share of the total toothbrush category. By September 2018, its market share had jumped by (REDACTED CONFIDENTIAL DATA).



Source: GSK Internal Sales LE 2018, A.C Nielsen

GSK and the Sensodyne team are very happy with the results, giving credit to the low-cost, lightweight, premium-looking design as a main driver of the toothbrush's success.

“Feedback from our trade partners is that the product’s value proposition – a quality Sensodyne toothbrush at such an affordable price – is attracting our target customers. The overall design package successfully communicates this and is a key driver of successfully helping millions of people manage their tooth sensitivity.”

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