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Submission title:
parodontax: Leave Bleeding Gums Behind

Client company:
GSK

Agency:
Interbrand

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November 2018

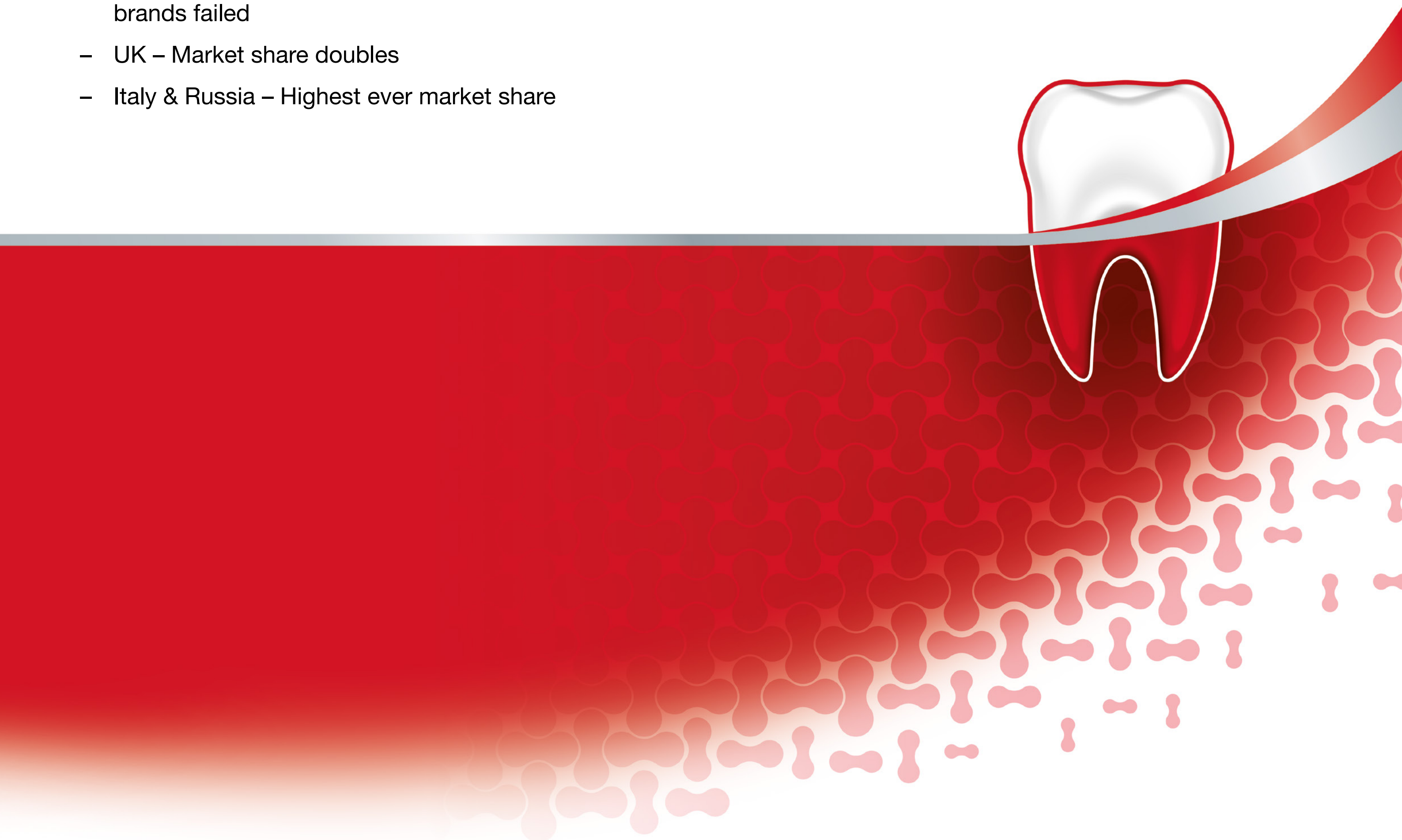
EXECUTIVE SUMMARY

Earmarked by GSK as one of seven global brands with strategic priority for the business, parodontax had to achieve some challenging commercial objectives, but most people either don't know or don't care about their gums.

Driven by the belief that the pack is the brand distilled in the hand, a new visual identity and packaging design needed to communicate the brand's new proposition, make it stand out in the category, and provide the visual springboard for a new communications programme. A tall order, especially under the context that competitors were failing in the USA market, there was minimal market growth globally in gum care, and parodontax cost around double the category price.

To say that the redesign has been successful is an understatement. Not only did it exceed all one-year objectives, but parodontax is almost single-handedly driving growth of the entire gum health sector.

- New design route had (redacted confidential data) purchase intent in research versus original design
- Fastest growing global toothpaste brand in the world
- Sales increase where design relaunched versus (redacted confidential data)
- (Redacted confidential data) CAGR doubles objective
- USA – Massive success where other major brands failed
- UK – Market share doubles
- Italy & Russia – Highest ever market share



Outline of project brief

GSK's global brand parodontax (aka Corsodyl in the UK) is primarily sold as a toothpaste that's proven to stop and reverse early gum disease. In 2015, GSK earmarked parodontax as one of seven global brands with strategic priority for the business. It retails at an average of double the category price and 42% of decisions in the category are made in-store, but the identity and packaging didn't support this at all. Combine this with planned USA market entry and ambitious growth plans, and it was clear that change was needed.

Cue to GSK partnering with Interbrand to redesign parodontax' visual identity and packaging. The designs needed to communicate the brand's new proposition, make it stand out in the category, and provide the visual springboard for a new communications programme.

Ultimately, the redesign needed to be the driving force to achieve several key commercial objectives one-year post-redesign:

- (Redacted confidential data) compound annual growth rate (CAGR) globally
- Outpace the global market by (redacted confidential data)
- US: succeed where Colgate & P&G had failed
- UK: grow toothpaste sales and build incremental market share
- Italy & Russia: grow market share

Description

Poor gum health is the world's biggest oral issue, yet no one cares. One in three adults suffer from gum disease globally and consequences can be severe – the patient develops gingivitis, advanced gum recession called periodontitis, and eventually tooth loss. In developed countries, more teeth are lost from gum disease than cavities or tooth decay.

Trials demonstrated that parodontax is four times more effective than regular toothpaste. However, changing perceptions amongst consumers wasn't going to be easy for parodontax – even with three to four variants available in 60 markets.

Change category behaviour...make people care about gums

Historical positioning, design and communications targeted a niche audience of people with a problem looking for a treatment. Heavy gum bleeding was dramatised, positioning parodontax as a specialist solution. A much larger potential consumer base was needed to meet the brand's aggressive business plan.

A new audience: sufferers who don't treat

A global omnibus suggested 24% of adults suffer symptoms but don't treat, while 11% do treat their symptoms. By targeting non-treaters, parodontax would probably still pick up treaters – and therefore be relevant to more than a third of the global population.

Ignorant and unconcerned

Half of non-treaters see blood when they brush their teeth, but don't believe it's a problem. The other half know they have a problem, but haven't bothered to do anything about it. Leveraging design to motivate people to treat their gums was all-important.

Collaboration

GSK operated an integrated all-agency team, with regular collective creative review sessions. Everyone worked from one communications brief, with tasks adjusted to align with particular channel disciplines. Interbrand spent a lot of time assessing the visual assets in terms of elasticity across the marketing mix because GSK viewed the design as integral to the development of all other communications. A lot of effort was placed on consistent usage of visual assets across all media, with Visual Brand Language guidelines forming a key part of that.

The opportunity and brand promise: Link the immediate to the long-term

Summed up as the brand promise 'Leave Bleeding Gums Behind', the opportunity was to reframe bad breath (and its social embarrassment) into an indicator of a bigger, more devastating problem in order to increase immediate motivation to act and denormalise bleeding gums, and to increase accessibility by broadening the brand's relevance.

Design solution

The springboard for all other communications, the visual identity and packaging design encapsulate the brand promise, and the pack itself is a consistent reminder of what the brand stands for, both on and off-shelf.

Central to this is the dissipation graphic device, which reinforces the product story. The solid, tessellated pattern breaks up as the swoosh lifts away from the tooth, tinting down from red to pink. This visually represents the reduction of bleeding gums and the colour gradation signifies the transition to healthy gums. The graphic device is accompanied by other key identity assets: redrawn logo, colours (and balance of these), typography, tone of voice, infographics and iconography.

So that people don't feel like they're compromising, the packaging leverages the claim 'help stop and prevent bleeding gums' as well as the fact that this is a daily fluoride toothpaste for healthy gums and strong teeth.


TEETH
tax®
EXTRA FRESH
gums
gsk
TEETH
tax®
ORIGINAL
gums
gsk
TEETH
tax®
ULTRA CLEAN
gums
gsk

And by putting a tooth on the pack, people understand that this about both the tooth and the gum.

Consumers associate the visual assets with parodontax, increasing memory recall and connecting the story told across different channels. A simple and elegant solution that befits paradontax' premium price.

Overview of market

Establishing a compelling design that persuades consumers to choose gum specialist parodontax – sold at a 200% price premium – would be tough, given the following market and consumer challenges.

Small and low growth
Toothpaste is perceived to be for teeth not gums. parodontax sells in 60+ markets, yet has only 1.1% global share of toothpaste. Gum health in total represents only 4% of oral care. In 2015, parodontax' value growth was +4%, in line with the market.

Market going the wrong way
Growth is in all-in-one formats like Colgate Total and Crest Complete – these formats had 59% of value versus 4% for gum health specialist toothpaste.

Major brands tried USA market...and failed
Colgate Pro-Gum Health launched in 2012 with heavy advertising and promotional investment. By 2015, they pulled investment in the USA and were being de-listed. P&G's Crest Pro-Health gum variant had very small share. If Colgate and P&G – with nearly 50% of the £36bn oral care market between them – had failed to unlock gum health, what chance had GSK with parodontax?

A new demographic and their beliefs
Non-treaters are a lot younger than the 45+ year olds previously targeted. Along with youth comes a belief of being bulletproof to long-term health conditions. Bleeding gums were easy to ignore because the consequences, if known, felt a very long way off. Plus:

- For the selfie generation, how one's teeth look drives oral care choices – even if they know they have gum disease
- Many consider blood when they brush as a sign of vigorous brushing – and therefore positive.
- The reason all-in-one formats take almost 60% of the market is because they meet the number 1 consumer need: all-round oral care.

Project launch date:
January-March 2017 (depending on market)

Design fees: (Redacted confidential data)

RESULTS

Competitors were failing in the USA market and there was minimal market growth globally in gum care, but parodontax' business plan was still hugely ambitious. To say that the redesign has been successful is an understatement. Not only did it exceed all one-year objectives by end December 2017, but parodontax is almost single-handedly driving growth of the entire gum health sector.

New design route had (redacted confidential data) purchase intent in research versus original design
Most design research is set as flat on this measure, because the expectation is that it's very hard for design alone to influence purchase significantly. So this prelaunch research result was absolutely massive for GSK – a major indication that the brand's new design was on the right track and the single biggest contributing factor to go ahead with this design route.

Fastest growing global toothpaste brand in the world
Parodontax is growing (redacted confidential data) faster than the global market to become the fastest growing global toothpaste brand. This is especially remarkable given the original objective was to outpace the market by (redacted confidential data).

Sales increase where design relaunched versus (redacted confidential data) in other markets
Markets that introduced the redesign saw a marked sales increase whilst those that hadn't relaunched (redacted confidential data).

(Redacted confidential data) CAGR doubles objective
Before the rebrand, parodontax' global value growth was just (redacted confidential data), but by the end of 2017 CAGR was up (redacted confidential data), doubling the already ambitious target of (redacted confidential data) and against 2017 market growth of just (redacted confidential data).

Growth is accelerating
In the last 3 months of 2017 growth accelerated to (redacted confidential data), 9 markets grew at over (redacted confidential data) YoY, and many more enjoyed their highest ever market share.

USA – Massive success where other major brands failed
In just 9 months, parodontax has done what neither Colgate nor P&G could do in the USA, the world's most competitive oral care market:

- £(redacted confidential data) gum health brand is (redacted confidential data) versus £(redacted confidential data) target
- (Redacted confidential data) market share is (redacted confidential data) versus (redacted confidential data) objective
- Already in (redacted confidential data) of all American homes, doubling (redacted confidential data) goal
- (redacted confidential data) repeat rates almost doubles (redacted confidential data) objective

UK – Incremental business
Already a £(redacted confidential data) mouthwash business in the UK (as Corsodyl), only £(redacted confidential data) sales were in toothpaste before the redesign, but by the end of 2017 market share and toothpaste sales skyrocketed. Importantly, this was incremental as (redacted confidential data):

- GSK doubled its UK market share from (redacted confidential data) to (redacted confidential data) against the target of (redacted confidential data)
- Toothpaste worth £(redacted confidential data) – four times more than before the redesign and (redacted confidential data) versus the £(redacted confidential data) goal

Italy – Market leadership
parodontax overtook its nearest competitor to be number 1 in pharmacy and attain its highest ever market share of (redacted confidential data).

Russia – Highest ever market share
The brand hit and sustained its highest ever market share with (redacted confidential data) of the toothpaste market.

Other influencing factors

This was a global rebrand, with considerable investment in marketing communications to support it in all markets. However, it could be argued that the design work influenced the brand's positioning and that the design was the central visual unifying force for all other communications.

Was it new markets?
The USA launch was important with (redacted confidential data) of incremental value, but even stripping out its effect the brand is still up (redacted confidential data).

Was it other marketing communications?
A single global solution and suite of marketing communications assets were created by global partner agencies, centred mostly on TV, out of home, and shopper activation. These were deployed largely unchanged in the UK, and transcreated for Italy, Russia and most of the other 60+ markets. With the knowledge of Colgate and P&G's prior failures, a separate social media campaign was conducted in the USA.

Despite this, YoY marketing communications investment in all markets (except USA) remained consistent between 2016 and 2017. Not only this, but the visual identity and packaging were purposely designed to be the visual springboard for all marketing communications. So without the redesign, parodontax may not have been as successful as it has been. Plus growth accelerated in the last three months of 2017, many months after campaigns had been fully activated.

Was it distribution?
Distribution in the UK and Russia was (redacted confidential data). Italy was (redacted confidential data) but sales were (redacted confidential data). In the US, sales per point of distribution accelerated and were (redacted confidential data) higher in August 2017 vs April 2017, so it was more about more sales per shop than additional shops.

Was it pricing?
Pricing was flat in 2017 versus 2016 and remains 2x the market average.

Was it changes to claims?
There were no regulatory changes.

Research/data sources

- GSK Internal Data for Parodontax: 2015-2018
- Multi-market retail audit data for GSK: Nielsen
- Omnibus covering 19 markets, sample of 1000+ adults in each market: Ipsos, Dec 2014
- Global Oral Care Report: Euromonitor 2013
- Qualitative research in Turkey & US with gum disease sufferers: Firefish Qual, Nov 2015 and Egg Strategy, Jan 2016
- Oral Care global consumer segmentation (sample 1000 18+ adults in each of UK, US, Germany, Brazil, China, India, Saudi) fieldwork: Added Value, Jan/Feb 2011
- Pack Express research in Germany and Poland: Join The Dots, Apr 2016
- Retail audit data, continuously collected from a representative sample of supermarket and pharmacies: Nielsen/IRI
- Total US All Outlets 44 Weeks Ending 31 Dec 17: IRI Panel