

Submission title: Sensodyne True White
Industry sector: Personal Goods
Client company: GSK
Design consultancy: Interbrand
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'For Publication'



Sensodyne is the market leader in toothpaste for sensitive teeth. The challenge for GSK is that customers switch to more cosmetic brands when sensitivity passes, even though high-abrasive whitening products lead to sensitivity.

In 2013, a new break-through low-abrasive formulation enabled the creation of a dual-action product for sensitivity and whitening – with no compromise. The opportunity was to develop a ‘super-premium’ brand that could compete as a whitening toothpaste while leveraging Sensodyne’s credentials in sensitivity: a brand to which episodic customers would stay loyal. The aim was to increase **frequency** of usage and **margin** compared to other Sensodyne products and increase the value of Sensodyne’s total sales and **market share**.

The product was named **True White**. The minimal design dramatized the whitening proposition. Critically, it ensured that True White would stand apart from other products, establishing a new ‘super-premium’ tier in

the range. The design was elegant with a tactile box and vertical format tube inspired by skincare. Messaging was minimal and emphasis was on the dentist recommendation stamp, unique to the product.

Following successful launches in several territories from 2014, True White launched in its biggest market, the US, in January 2016. **Retailing at \$6 it was the highest priced toothpaste on the shelf.**

It became a bestseller. **Sales surpassed \$25 million in the first year**, the best performance for a new Sensodyne product ever. Crucially, it has a strong repeat rate with **2.2 repeats per repeater**. All this with a **high margin** equating to over **£19m in profit**.

Sensodyne’s **US market share increased by one percentage point from 16.7% to 17.7%**. And the sparkling success of True White has inspired GSK to think more creatively about further product developments.

\$25m

Sales of over \$25 million
in first year, exceeding the
target by 10%

2.2

2.2 repeat purchases per
repeat customer

“The design enabled us to make the most of a gap in the market. Its strength is in its clear strategic focus and beautifully crafted execution.”

Ana Saba,
Global Marketing Director, GSK

Outline of project brief

GSK knew that Sensodyne customers switch to more cosmetic brands when the sensitivity passes even though high-abrasive whitening products lead to sensitivity.

In 2013, a new break-through low-abrasive formulation enabled the creation of a dual-action product for sensitivity and whitening. The opportunity was to develop a 'super-premium' brand that could compete as a whitening toothpaste while leveraging Sensodyne's credentials in sensitivity. A brand to which episodic customers would stay loyal.

The new product would reinforce Sensodyne's positioning as the expert in sensitivity while at the same time building a more contemporary and innovative image for the whole brand.

The aim was to achieve higher **frequency** and **margin** compared to other lines. Avoiding cannibalisation, it would need to drive the value of Sensodyne's total **market share**. Targets were set high, using Sensodyne's successful flagship product Repair & Protect as a benchmark.

1

To achieve US sales of \$22.7m in year one with a high margin

Benchmark: Repair & Protect achieved \$24.5m

2

To achieve 1.9 repeat purchases in the US in one year

Benchmark: Repair & Protect achieved 1.9

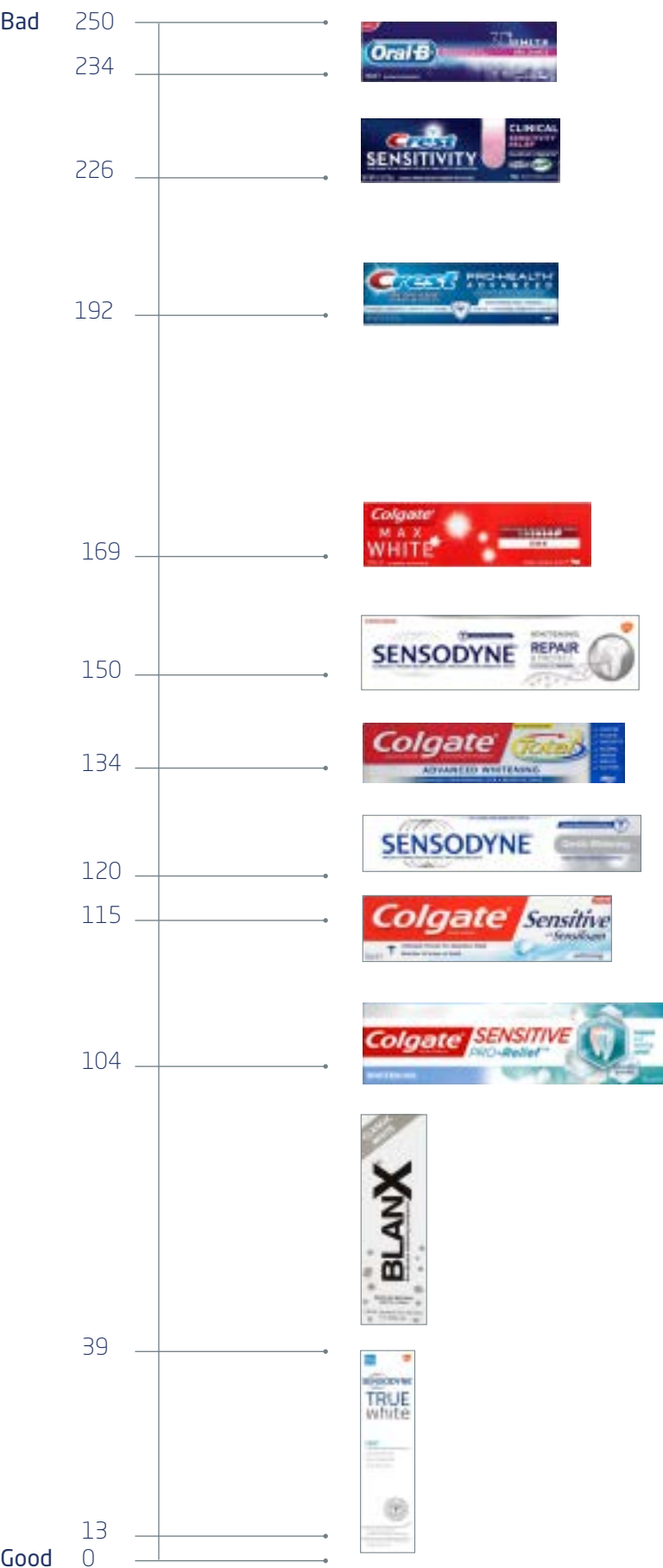
3

To drive overall market share for the Sensodyne range



3: PROJECT OVERVIEW

Relative Dentine Abrasivity (RDA)



(Source: GSK)

Description

Owned by GSK, Sensodyne is the world’s No.1 sensitivity toothpaste brand (Sensodyne research 2013). It offers a range of products specifically formulated for the care and treatment of sensitive teeth.

Whitening treatments are known for causing sensitivity because most are very abrasive. Some dentists recommend use of Sensodyne before and after whitening treatments. Relative Dentine Abrasivity (RDA) is a measure of abrasivity. True White’s non-abrasive patented technology is different from other whitening toothpastes because it does not use abrasive silicas. **It is ten times less abrasive than many whitening toothpastes.**

The creation of this new formulation backed up by research meant that Sensodyne could launch the first whitening and sensitivity toothpaste that would be recommended by dentists. **The design needed to communicate the breakthrough proposition and make it stand out in the category.**

Ten times less abrasive than many whitening toothpastes

3: PROJECT OVERVIEW (CONT)

Overview of market

The value of the oral care market in the US grew by just 2.2% in 2016 (Mintel). Products from Colgate-Palmolive and Proctor and Gamble dominate the category representing 73% of sales.

Over the last ten years the trend for personal grooming has increased in a context of social media selfies and celebrity culture. In 2015, the whitening toothpaste segment was valued at \$2bn globally, led by premium propositions Colgate Optic White (Colgate-Palmolive) and Crest 3D White (Proctor and Gamble). These would be True White’s main competition.

In the last year, the whitening market grew in value by 6.7% in the US. There has also been an increase in awareness around sensitivity and tooth health. The sensitivity category grew by 6%.

Only few sensitivity buyers buy exclusively sensitivity toothpaste. The opportunity is in encouraging episodic users to be loyal. The challenge for Sensodyne was in how to respond to the demand for whitening while staying true to its dedication to sensitivity-free teeth and clinically proven efficacy.

The opportunity was to establish a ‘super-premium’ brand for a whitening product that would not compromise sensitivity. At \$6, it was to be priced higher than anything else on shelf at the mainstream retailers and twice the price of Crest 3D White. The price set it apart in the market but presented a significant challenge to sales. **The design would need to work hard to present a credible whitening proposition from a brand known for sensitivity and justify the price.**

Sensodyne True White	\$6.03
Sensodyne Complete Protection	\$5.16
Sensodyne Repair & Protect	\$5.13
Colgate Optic White	\$3.96
Colgate Enamel Health	\$3.44
Crest 3D White	\$2.97

(Source: GSK)

2016

Project launch date

True White launched in the US in January 2016.

£100k

Size of design budget and production costs

The design fee was £100k.



4: OUTLINE OF DESIGN SOLUTION

(376 WORDS)

Interbrand worked with the client team to develop the product branding prior to the launch of True White in its first territory in 2014, for the US. The design in the US has remained true to the initial concept.

The creative was driven by a strategic review in which the team considered the brand positioning, range hierarchy and competitor set. The design needed to present a credible whitening product from a brand known for sensitivity and introduce a new 'super-premium' tier in the Sensodyne range. **The design solution came in the concept of 'less is more', a brave minimal approach that would complement the whitening proposition, exude integrity, and sit apart from noisy competitor packs on shelf.**

All aspects of the branding and packaging design, from name through to materials, finishes, graphics and messaging were carefully crafted to deliver the proposition with confidence.

A name with integrity

The name True White embodies the honesty and credibility central to the Sensodyne brand. It does not over-promise, instead it is associated with a natural and pure whiteness.



"It says 'True'... it's more natural whitening rather than cosmetic"

Female Whitening competitor user
(GSK commissioned market research)

Enhancing the Sensodyne brand

The True White name is locked up with the Sensodyne brand mark to reinforce the closeness of the proposition to the core Sensodyne brand values and maximise reciprocal associations around innovation and contemporaneity.



"The brave design made what could have been a confusing proposition into something that made sense for consumers."

Ana Saba,
Global Marketing Director, GSK



Less is more

White dominates all design applications. It is the consistent design concept. The minimal appearance of the pack helps it to stand out from other busy packaging with multiple flashes and messages. Borrowing from the vernacular of cosmetics and skincare, attention is on detail and elegance. Silver foiling is used in the logo and soft touch varnish aligns with the low abrasivity proposition. Embossed and debossed details elevate the product and brand experience.

Disruptive vertical pack

The vertical pack structure is used to differentiate the product from other Sensodyne products and other brands on shelf, establishing its 'super premium' positioning. The tube has a premium soft touch substrate which retains its structural integrity during usage and allows the product to stand-up with the aid of its bespoke silver cap. Again, borrowing from skincare formats, this lends it a more cosmetic association.

Emphasis on dentist validation

As one of few graphical elements on pack, emphasis is given to the unique dentist recommended stamp.



5: SUMMARY OF RESULTS

The strategy was to develop a 'super-premium' brand that could compete as a whitening toothpaste while leveraging Sensodyne's credentials in sensitivity – a brand to which episodic customers would stay loyal. The aim was to achieve higher **frequency** and **margin** compared to other product lines. Avoiding cannibalisation, it would need to drive Sensodyne's total **market share**. Targets were set high, using Sensodyne's successful flagship product Repair & Protect, Sensodyne's flagship product launched in 2013, as a benchmark.

Results of Objective 1

To achieve US sales of \$22.7m in year one with a high margin

True White was not expected to meet the performance of flagship product Repair & Protect which achieved sales of \$24.5m in its first year. The target for True White was \$22.7m. In fact, **it exceeded its target by 10%** and surpassed Repair & Protect too by **reaching sales of over \$25m**. Sales have been driven by a high level of repeat purchase. True White's premium packaging and emphasis on added-value resonated with affluent consumers and successfully commanded its high shelf price of \$6. **True White delivers the highest margin in the Sensodyne portfolio.**

- Sales of \$25m in one year, exceeding target by 10%
- Outperformed Repair & Protect
- Highest shelf price at \$6 with a high margin
- Over \$19m profit

Results of Objective 2

To achieve 1.9 repeat purchases in the US in year one

Repair & Protect had achieved a rate of 1.9 repeat purchases per repeat customer in its first year. True White's repeat rate surpassed this achieving **2.2 repeats per repeat customer in the first year**. 40% of customers who tried it bought it again. This is hugely significant as the intention was to build loyalty, something that had always been a challenge. (See chart A overleaf)

Research showed that repeaters were triggered by the dual-action benefits, but also, importantly for the design story, by 'brand' and 'quality'. (See chart B overleaf)

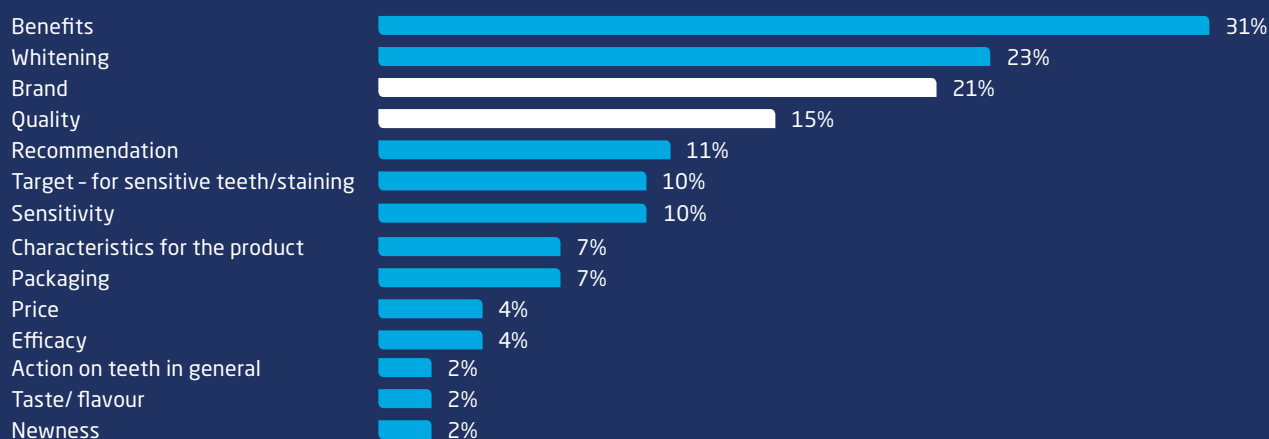
- 2.2 repeat purchases per repeat customer
- 40% of customers repeated their purchase, 5% more than any other Sensodyne product
- 26% of repeaters purchased on more than four occasions in one year
- 'Brand' and 'Quality' cited as triggers for repeat purchase

5: SUMMARY OF RESULTS

Chart A: Surpassed target by attaining 2.2 repeats per repeater in one year



Chart B: Triggers to buy, repeat customers - importance of 'brand' and 'quality'



Results of Objective 3

To drive overall market share for the Sensodyne range

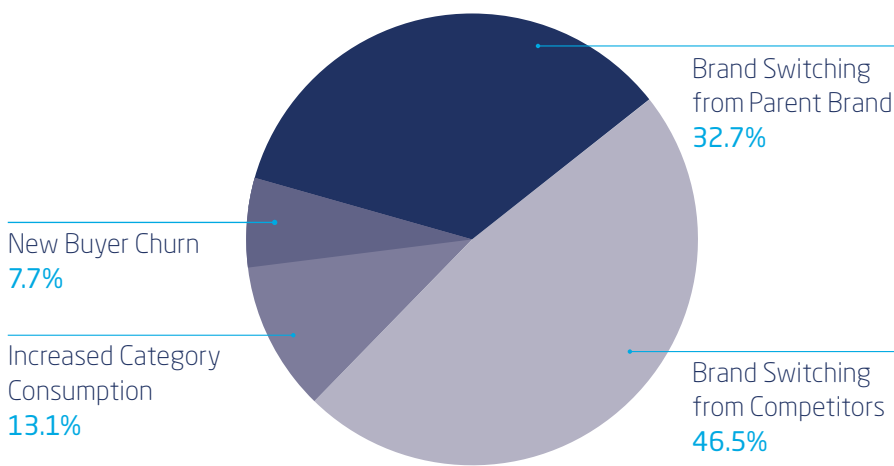
For GSK, it is important that True White sales do not cannibalise the rest of the range. In fact, True White successfully competed as a 'cosmetic' toothpaste, with sales coming from increased penetration and new customers. Almost half the sales came from competitor brands. No other new Sensodyne products launched or significantly changed during the period, but a positive halo effect for the brand enhanced sales of other Sensodyne products too. The result is that that **Sensodyne's total US toothpaste market share increased by one percentage point from 16.7% to 17.7%.**

- US market share increased by one percentage point to 17.7%
- Global market share increased by 10.2%

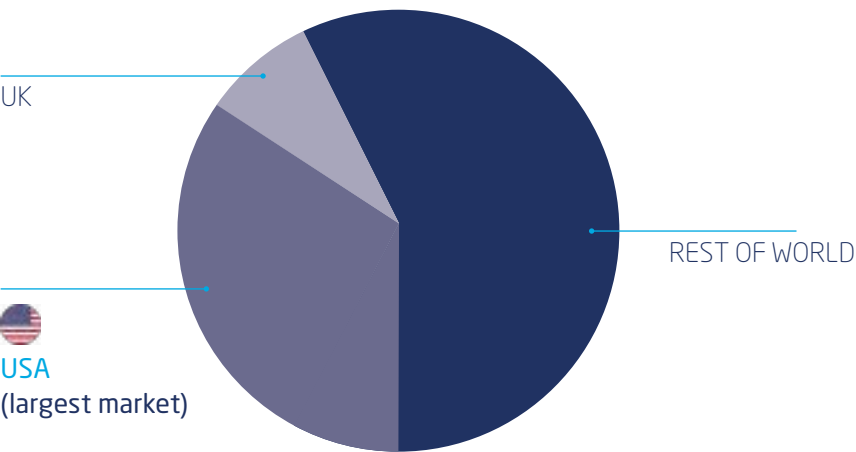
5: SUMMARY OF RESULTS (CONT)

True White volume is helping to drive the whole category

13% incremental to the category (non users)

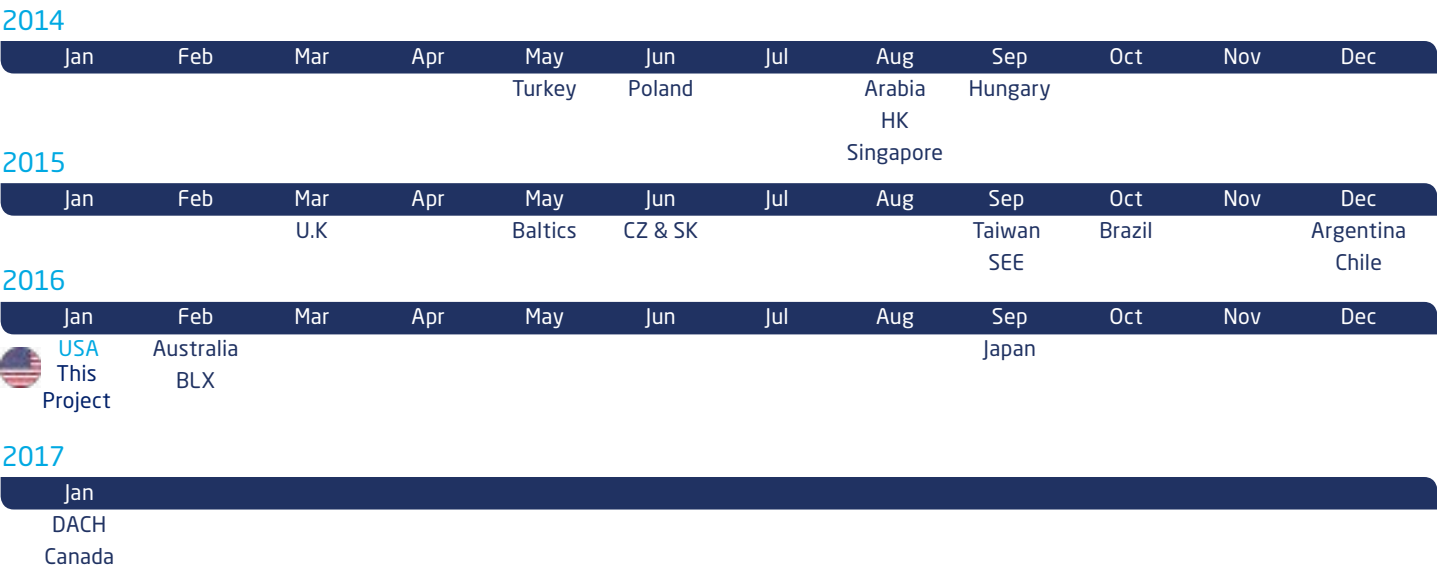


True White global retail sales



The global picture
The results presented here relate to the **US market only**. This is Sensodyne’s largest market which represents one third of its turnover. However, Sensodyne global market share has increased by 10.2% in the last year, demonstrating the overall success of the brand, driven by the True White launch. True White has been a true success.
(Source: GSK)

True White Global Roll-out



- Truly differentiated
- Truly relevant
- Truly massive
- Truly premium
- Truly profitable
- Truly incremental
- Truly global



6: OTHER INFLUENCING FACTORS

Did True White do any better than other Sensodyne launches?

The performance of True White has been benchmarked against that of recent flagship product Repair & Protect. It has been even more successful despite the higher price point, beating targets for sales and repeat purchase.

Whitening and sensitivity categories have both seen growth. How is True White special?

Both Whitening and Sensitivity categories have experienced growth at 6.7% and 6% in the last year. The achievement here was in crafting a credible whitening product brand from a brand known for sensitivity. The strategy was to create a 'super premium' proposition that stood apart in the existing market and commanded the highest price on shelf. Design was critical in establishing this premium positioning, justifying the price and making sense of the dual benefit of the product. True White had to compete with Colgate and Procter and Gamble brands that dominate the cosmetic toothpaste category and managed to steal market share from these lower priced competitors. The carefully thought-through design enabled the impressive turnover of over \$25m in the US in one year and increase in US Sensodyne market share of one percentage point to 17.7%.

Could the sales have been driven by price promotions?

Price promotions and dentist recommended trials were lower for True White than for Repair & Protect. Data shows that the price paid for True White averaged at over \$6.

Could the sales be driven by advertising?

The product branding and packaging was designed with advertising and POS in mind. Advertising uses the True White visual language with the pack featured as the hero and the minimal look and feel carried through. Investment in advertising was in line with previous launches and there was considerably less above-the-line activity compared to competitors Colgate and Crest.

Is it simply an amazing product?

True White is the first whitening toothpaste to be recommended by dentists. The team knew this was the USP. Cultivating a premium positioning, the design worked hard to emphasise this advantage and establish True White as a trust-worthy sensitivity product and a credible whitening product. In a noisy aisle, the team had the insight and confidence to launch with a stand-out minimal look and low volume messaging. The brave design made what could have been a confusing proposition into something that made sense for consumers.

Was it just a success in the US?

We have based the case study on the US story for clarity. The product was successful in numerous other territories too.



7: RESEARCH RESOURCES

Sensodyne financial data
GSK commissioned research
GSK internal presentations
Mintel