



Maximising Poligrip's Global Power with dazzling golden re-stage

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Client company:
HALEON
Formerly GSK

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Interbrand

Executive Summary

Maximising Poligrip's power

In a global denture fixative market worth [redacted confidential data], Poligrip (represented by local brand names in different markets across the world) accounts for [redacted confidential data], a 44.9% share, and is market leader in many countries (MAT, 2022). In the US, however – the brand's largest market, accounting for 20% of global sales – it ranks #2 behind market leader. The pandemic drove a 20% reduction in consumption (GSK data on file, 2020) in this market, as consumers no longer needed a denture fixative, and this kickstarted a desire to reignite Poligrip's superiority as a brand, starting at shelf. Although the product itself is loved by consumers, and scores highly on all consumer product attributes, the existing packaging was not representing the brand's credentials and lacked shelf stand out.

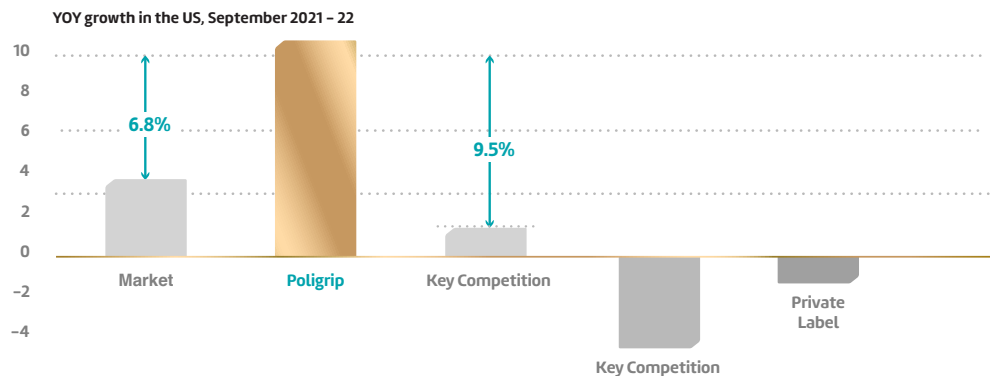
A radical redesign saw a new Power Max Hold + range, with four key variants developed. The design emphasises the four key consumer need states, leading with a secure 12 hr Max/Power Hold, plus one additional benefit of food seal, comfort and freshness. It was rigorously tested across several markets, with two products from the range launching in February 2022, initially in the US, followed by an exceptional global launch across Europe, Russia, Middle East & Africa, Australia and Latin America.

The results have exceeded targets globally and outperformed against Haleon's objectives. Our focus here is predominantly on the US as the first and largest market to launch, with six months' data (February–September 2022). Figures are all YTD.

Objective 1

To grow sales by 4.7%, by creating distinctiveness, greater stand out and driving superiority on shelf

- In the US Poligrip grew by **10.6%** vs category growth of 3.8%, and key competitor growth of 1.1%
- US sales have exceeded the original target by **71%** and a new higher target by 19%
- Globally the brand grew by **11.8%** vs market growth of 7.4%



Objective 2

To protect the brand's market share, increasing penetration and repeat purchase

- Brand share grew by **2.2%** in the US whilst market leader and other brands lost market share
- Brand share also grew **1.8%** globally
- In the US penetration was **double target** and repeat purchase was **5.3% above plan**

Objective 3

To justify a price premium without compromising sales by driving brand superiority

- The new packaging achieved a **10% price premium**

Objective 4

To emphasise the product's performance and attributes, which customers love

- In research, the new US pack scored better than competition on all key attributes

Context & Overview

A market badly affected by Covid-19

When Covid hit the world in March 2020, it confined everyone to their homes and drove changes to the way the whole world socialised. This shift was significant for dental appliance wearers and impacted how and when they used products. People didn't go out socialising, so had no need to wear their dentures, and even if they did go out, they wore a mask. This resulted in a 20% reduction in consumption (GSK data on file, 2020). The pandemic thus had the potential to result in a devastating and long-term impact on the market and all its main players.

Poligrip (represented by local brand names in some markets) is Haleon's denture fixative brand, worth [redacted confidential data] – a 44.9% share of the [redacted confidential data] global market. The US is one of Haleon's largest markets (alongside Japan), and accounts for 20% of the overall fixative category, with approximately 46m people in the US wearing either full or partial dentures (Usage and Attitude Study, USA, 2022). In this market Poligrip is No 2, behind the market leader, averaging a share of 34% against market leader's 56%. With strong competitive pressure, and some recent Haleon innovation challenges, the brand team decided it was time for Poligrip to stamp its authority as a strong fixative contender within the US market.

Leveraging the opportunity post-Covid

Despite the challenges, there remained huge potential. Only 19% of the 700m denture wearers worldwide (38% in the US) use a fixative, and there was an opportunity to not only attract non-users, but also bring back lapsed users and encourage trade-up.

In December 2020, the brand team decided it was time to act – and leverage the momentum of the category bounce back post Covid, when the world opened up and consumers started to buy denture fixatives again. The company was aware that change was required, with its Poligrip packaging no longer working hard enough on shelf to communicate the product's strength. There followed a clear ambition to be bolder on shelf, drive superiority with consumers and activate stronger, bolder claims that had proven better than the competition in 2020 Ipsos consumer validation studies.

Early in 2021 we were therefore briefed to redesign the packaging, following a global competitive deep dive. There were four key business objectives:

1 To grow sales by 4.7%, by creating distinctiveness, greater stand out and driving superiority on shelf

2 To protect the brand's market share, increasing penetration and repeat purchase

3 To justify a price premium without compromising sales

4 To emphasise the product's performance and attributes, which customers love

Context & Overview



Description

The packaging needed greater shelf stand out, reinforcing the key features that are purchase triggers for consumers in this category – security of hold, food seal, daily comfort, and freshness.

Several options were tested in qualitative research with consumers, including gold and platinum colourways, security devices such as padlocks, chains and clocks, and various ways of highlighting the product’s key attributes. Two options – one gold, one platinum – were then put through quantitative testing. Both performed extremely well, with the gold option slightly ahead on consumer preference.

The chosen pack design retained the Poligrip branding and overall layout of the old design but introduced gold and purple globally and gold and red in the US to elevate its presence on shelf. Gold was partnered with other distinct and ownable colours to achieve range differentiation. The nozzle feature, now well-known in the market, was retained and moved to the bottom of the pack to convey the precise nature of the application. A 12-hour padlock (clock device in the US) reflected the clinically proven ‘hold’ claim and ‘Power Max’ became a sub-range name for four ‘Hold +’ variants: Hold + Seal (original flavour), Hold + Fresh, Hold + Seal Mint, and Hold + Comfort. In the US ‘POWER’ was also used as the variant name (POWER HOLD +).

Two packs from the range currently in the US market (Hold + Fresh a Walmart exclusive)



Context & Overview

Key Facts

Launch dates:

- The core US product started arriving in stores in February 2022.
- The Fresh variant was a US exclusive in Walmart from February 2022.
- The core global product was launched into Europe, Russia and Latin America from March/April onwards.
- The Comfort variant will launch from Q4 2022, 2023, 2024 across different markets.

Design fees:

[redacted confidential data]



Results

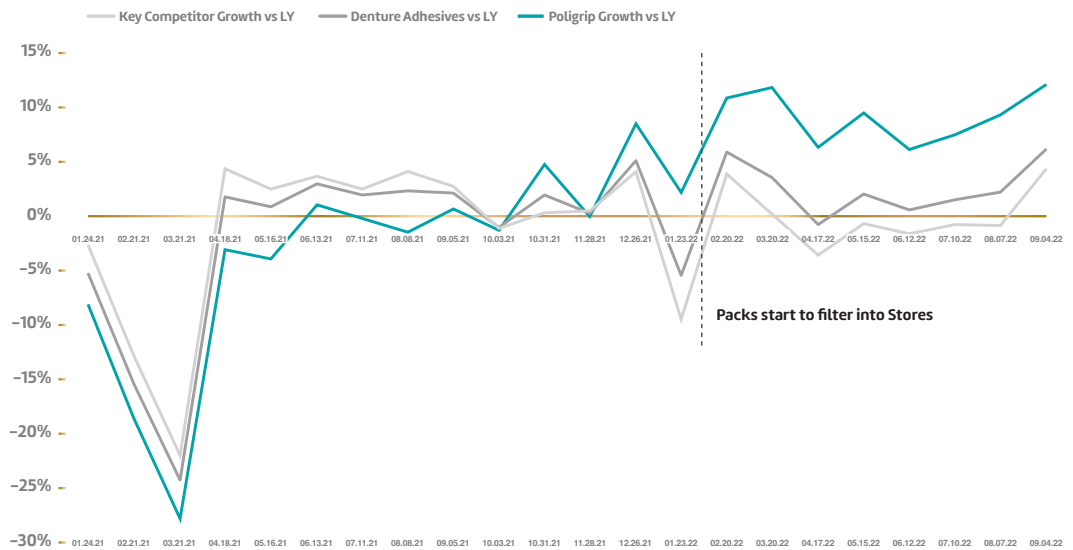
The new packaging launched initially in the US (February 2022), then across individual European markets, Russia and Latin America from March/April 2022 onwards. In the US Hold + Fresh is a Walmart exclusive for 12 months.

Objective 1

Growing sales, through shelf standout and superiority versus competitors

The graph below shows the market decline during Q1 2021 as Covid hit, followed by a slow recovery until Q1 2022 when the new packs started to filter into store. The growth of Poligrip since February/March 2022 is significantly above both the category and the competition.

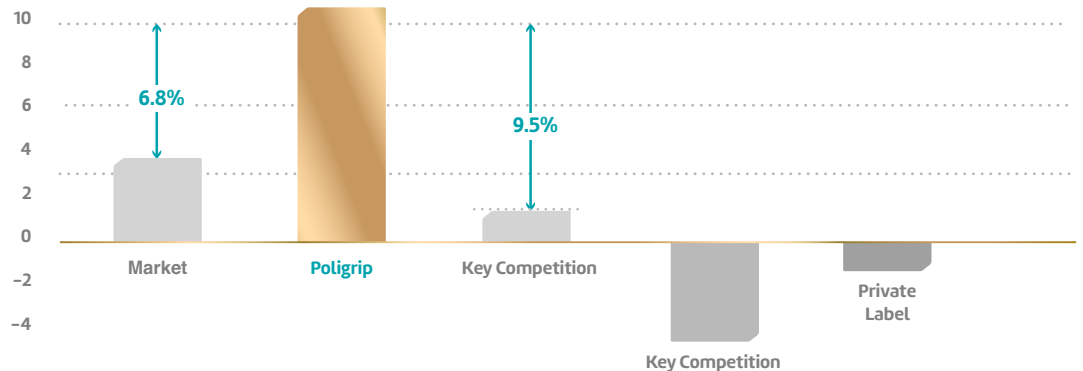
Poligrip & Key Competition Consumption



YOY growth in the US

By September 2022, seven months post-launch in the US, YOY growth was **10.6%** higher than YTD vs last year, **2.8 x** category growth of 3.8% and **nearly 10 x more** than market leader's 1.1% growth.

YOY growth in the US, September 2021 - 22



Results

Walmart accounts for 44% of all denture fixative sales in the US, so Haleon offered the Hold + Fresh variant as an exclusive prior to its wider launch, alongside some bespoke promotions and digital activation, all of which featured the pack centre stage.

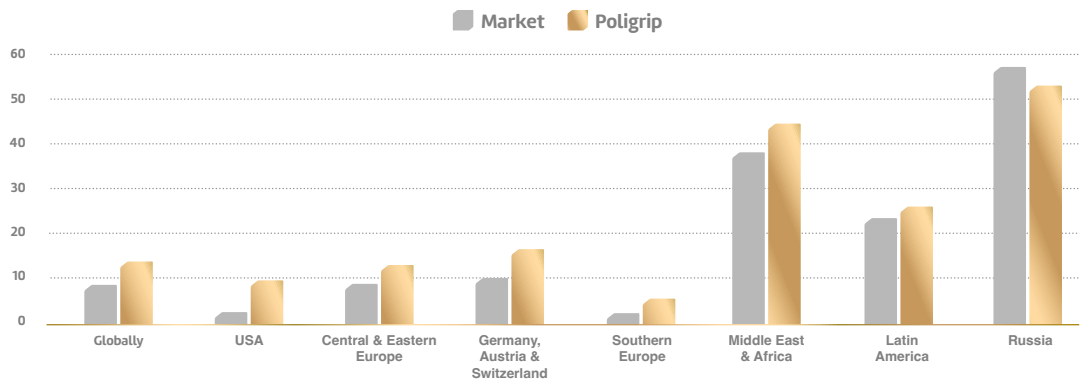
This resulted in:

- Double digit growth between Jan–July 2022, at **13.7%** against category growth of 3.5% (nearly **4x**)
- An **additional shelf listing** (from 4 to 5 shelves, the 5th at eye level)
- Growth of **15.6%** over the same period in 2021, when the category grew by just 4.4%
- **Four incremental listings**, including an additional twin-pack listing
- **Permanent shelf-tray inclusion** for 12 months

Global sales also outgrew the category by 59%

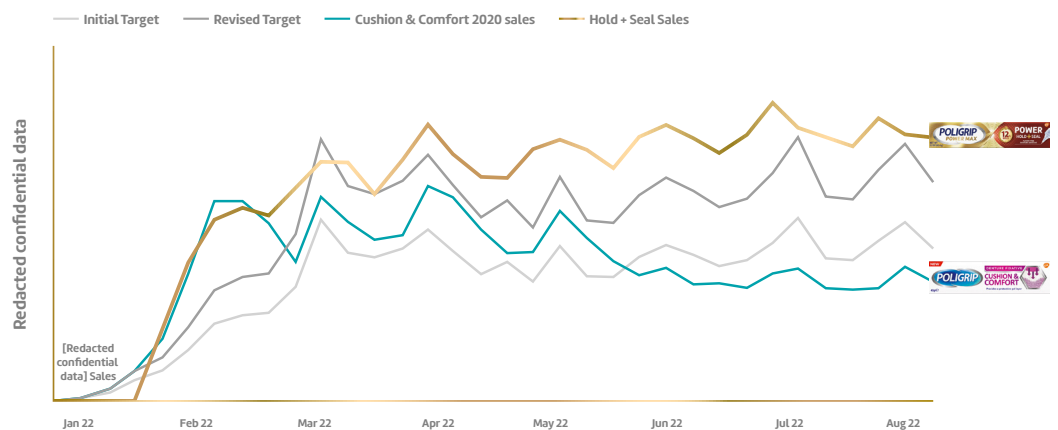
In other geographical markets products only started filtering onto shelves at the end of Q1 2022 and sales data often lags by up to 8 weeks. However, globally Poligrip grew **11.8%** against a category growth of **7.4%** in the year (Compass, July, YTD 2022). Specific markets have seen extraordinary growth: in Austria and Italy the brand **grew by 8.3% (Austria) and 1.5% (Italy) in a declining market**. The performance is accelerating in the L3M, with +14.1% vs category growth of +8.6% – truly exceptional results.

% Growth YTD (Sept 2022)



Sales exceeded both original and revised targets

In the US, sales have exceeded the original target by **71%** and a new higher target by **19%**.



Results

Objective 2

Brand share growth exceeded category and market leader

In the US, the brand grew its share by **2.2%** when all other brands lost share. Globally the brand has gained **1.8%** share YTD.

Penetration and trial were **double** Haleon's target with repeat purchase **5.3%** above plan.



Objective 3

A price premium of 10% has been achieved

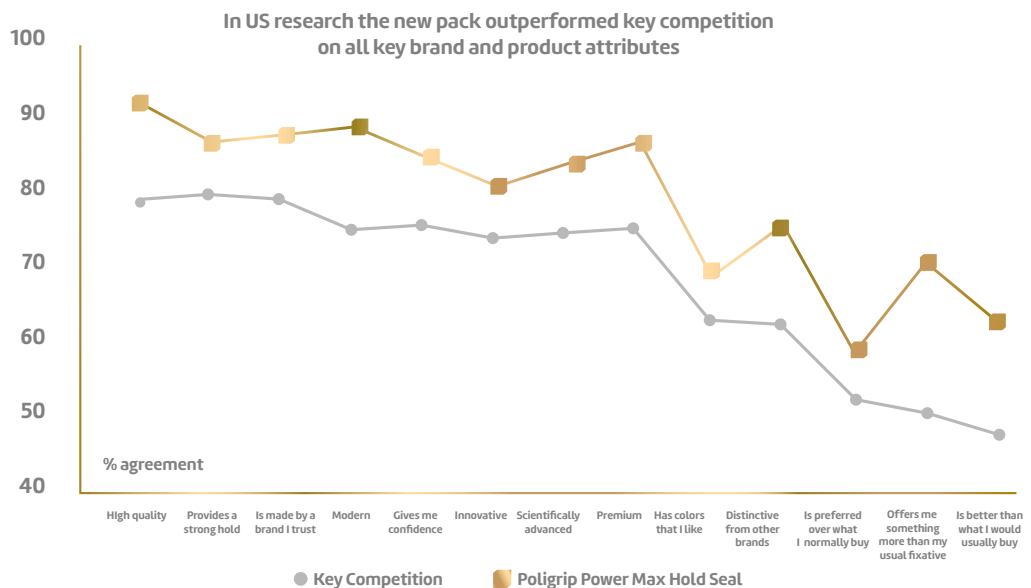
In pre-launch research, 73% of existing users agreed that they would pay a 15% premium for the new design. We therefore made sure that we maximised the elements of the pack design that were giving consumers these cues by prioritising the gold visual brand language, giving more weight to the secure hold icon, and retaining the superior precision nozzle on front of pack.

Once launched, the superior look and feel of the new packaging enabled a price increase of at least **10%**, whilst still encouraging growth (in sales and brand share).

Objective 4

The packaging scores highly against all consumer metrics & highlights the product attributes

Pre-launch research (IPSOS IQ pack test) put the new pack design ahead on all key variables. When tested head-on against key competitors in the US, the pack design came out in front on every key brand and product attribute. It also came out ahead of the old pack on several key metrics such as visibility, time to find and relevance, in the US, Spain and Russia.



Results

There has been no formal consumer research post-launch, but consumer reviews on Amazon and Walmart in the US have been extremely positive.

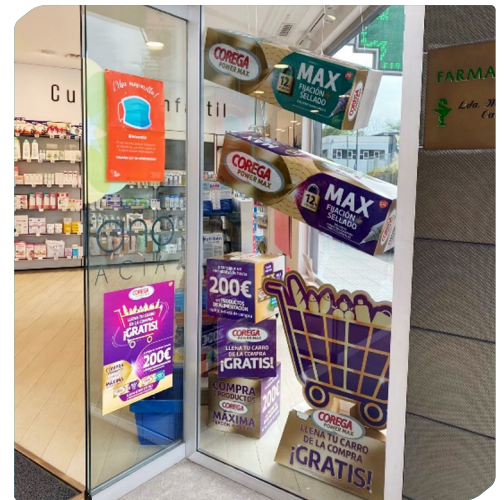
“I really like this packaging. The words POWER MAX grabs your attention and also the 12h Hold ... makes me think that this will hold my dentures in place for the whole day plus some”

Consumer in research

Influencing factors

Whilst it is true that Haleon invest in all the usual marcomms including in-store promotions and TV advertising, in this case the hero of all activity is the new pack design.

It was also several weeks before this activity began in the US, yet sales had already shown an uplift as stock built in the five weeks between 06/02 – 13/03. It was therefore evident that even without in-store promotions and TV advertising, the new packaging was already delivering against objectives.



Hold + Seal US sales

