



Targeting sensitivity and
other oral care needs

Submission Title
Sensodyne Complete Protection

Industry Sector
Consumer Goods –
Personal Products

Client Company
GSK

Design Consultancy
Interbrand

Submission Date
26th June 2015

For publication

“This launch really encapsulates the idea of a ‘Complete’ solution with everything you need from a sensitivity toothpaste in one. The creative approach has really exploded the idea and this has genuinely been a Complete 360 launch on a multi-national scale.”

Mick Cox (GSK Vice President & Global Business Lead for Sensitivity and Acid Erosion)



Executive Summary

from **7.7%** to



increase in global share



increase in sales call time

GSK approached Interbrand to create a compelling identity for a new premium range of Sensitivity oral care products, to sit within the 'Advanced' pillar of the existing Sensodyne portfolio – already the world's No. 1 Sensitivity Toothpaste Brand. The task was to position the range – amongst users who only tend to use the product 'in extremis' – as a complete oral care solution, offering superior cleaning AND sensitivity protection, suitable for everyday use.

In addition to firmly establishing the credentials of this new sub-brand, GSK were keen to grow the total Sensodyne brand (avoiding excessive cannibalisation) and market share, globally. Interbrand's dynamic "carousel" design solution succeeded in communicating the **7 product benefits** in a way that resonated semiotically with key consumer groups leading to impressive commercial success.

Since the global roll out of Sensodyne Complete Protection started in April 2013, Sensodyne's global share has risen from 7.7% to 9.4%.

Complete Protection delivers incremental Sensodyne total brand share in almost all markets.

After just 12 weeks sales, market share figures of Sensodyne Complete Protection are already approx 65% of the value of their established Repair & Protect brand.

New customers have been brought into the brand (50% lower cannibalisation figures than forecast) and the category.

Healthcare professionals are more engaged than ever, leading to the 25% increase in sales call time dedicated to Complete Protection.

Word count: 227

Project Overview

Design Challenges

- To position Sensodyne Complete Protection as a complete oral care solution offering superior cleaning and sensitivity protection.
- To shift the consumer's perception of Sensodyne from being a specialist sensitivity – relief product to a total oral care solution for everyday use.

To create a design language that illuminates the product's multiple benefits through visual cues our target audiences would understand and relate to.

- To make the brand more appealing and feel more premium to a wider audience.
- To create maximum on-shelf impact and stand apart from our competitors.

Commercial Challenges

- To grow total Sensodyne brand sales and market share.
- To bring new users to the brand and to the sensitive oral care category.
- To engage experts (oral healthcare professionals) in the brand.



Description

Glaxo Smithkline (GSK) are a science-led global healthcare company. They research and develop a broad range of innovative products in three primary areas of Pharmaceuticals, Vaccines and Consumer Healthcare. They have a significant global presence with commercial operations in more than 150 countries, a network of 84 manufacturing sites in 36 countries and large R&D centres in the UK, USA, Spain, Belgium and China. They are experts in oral care, combining a unique understanding of consumer needs with science.



Sensodyne is the world's No. 1 Sensitivity Toothpaste Brand, recommended by dentists across the world.

(value retail sales data, 12 months ending 31 Dec 2013)

Sensodyne offers a range of products specially formulated for the care and treatment of sensitive teeth.

Although one in three adults suffer from sensitive teeth, most don't reach for specialist toothpastes to treat or prevent pain. They think it will pass and that using products designed for sensitivity might compromise their daily teeth-cleaning routine.

To many, 'specialist' means crisis, not everyday oral care. This was a key issue for Sensodyne's brand reach. The consumers view of 'specialist' was being reinforced with clinical packaging and the use of the dentist as its spokesperson, which demonstrates Sensodyne's efficacy and expert credentials.

Sensodyne Complete Protection was formulated as the brand's superior solution for complete oral care.

Clinical trials proved that its exclusive proprietary technology, Novamin, would actively seek out and repair weakened areas of the tooth's surface, eliminating sensitivity in turn, by using the building blocks of teeth in the paste.

The Sensodyne Complete Protection range comprises just 4 lines – 2 toothpastes (Original, Extra Fresh) and 2 toothbrushes (soft, medium). The pastes have 7 product benefits; sensitivity, enamel protection, cleaning, gum health, breath freshness, plaque and whitening.



A blue rounded rectangle containing the text '£719 million' in white, bold, sans-serif font.

total sensitivity toothpaste
global market share

A dark blue rounded rectangle containing the text '9.4%' in white, bold, sans-serif font, followed by a white globe icon.

Sensodyne's share of
global market

A teal rounded rectangle containing the text '61%' in white, bold, sans-serif font, followed by a white pie chart icon showing a small slice.

Sensodyne's share of total
sensitivity market

Overview of the Market

The total value of the global oral care market is £7.2 billion, with global toothpaste at £4.3 billion. Sensodyne, the World's No.1 Sensitivity Toothpaste Brand has a global share of the oral care market of 9.4%.

The sensitivity toothpaste market is worth £719 million; of that Sensodyne has 61% share.

Sensodyne's portfolio falls into 3 pillars, or tiers; It is Essential Care, Advanced Care and Specialist. The Essential Care range of products drives approximately 70% of their volume and the rest is split between the 2 more premium products. The premium pillars are strategically important to drive incremental growth by encouraging consumers to trade up to higher value products. Sensodyne Complete Protection was launched to sit within the Advanced Care pillar, alongside their existing Repair and Protect brand.

Over the past 5 years GSK have seen big generalist brands enter their specialist area such as Colgate, Oral B and Arm & Hammer, all which have brought sensitivity pastes to the market.

Project launch date: April 2013

Word count: 633

Design Solution

1. To position Sensodyne Complete Protection as a complete oral care solution offering superior cleaning and sensitivity protection.



Key to this first task was to ensure that the “completeness” of the solution was communicated – to achieve this we employed an easy to navigate check list of everyday oral care benefits on the front of the pack; tied up to the more indepth explanation on the back of pack.

The carousel was also specifically and carefully developed – as described below – to visually articulate the 7 product benefits.

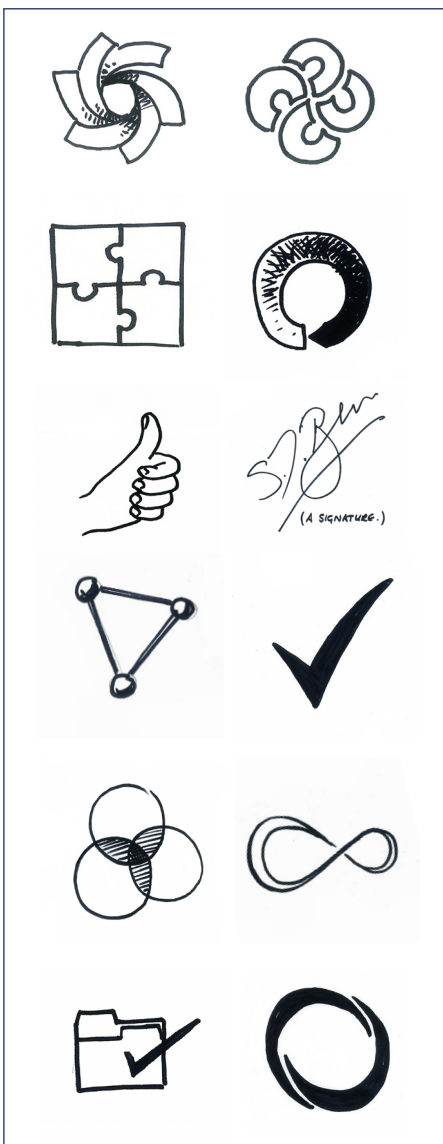
2. To shift the consumer’s perception of Sensodyne from being a specialist sensitivity-relief product to a total oral care solution for everyday use.

This was a subtle balancing act of using the everyday freshness cues of the blue and green colour palette to prompt cleaning reassurance – along with the roundness of the carousel to semiotically cue both continuity of use and protection – with a dash of silver foil to signify premium.

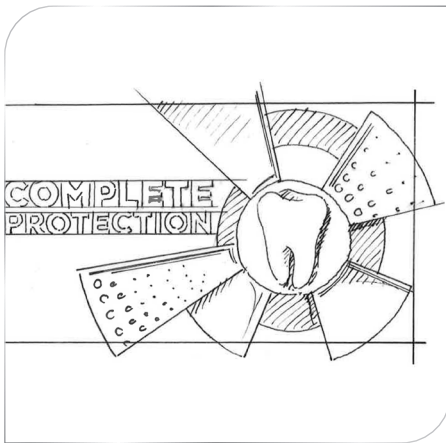
3. To create a design language that illuminates the product’s multiple benefits through visual cues our target audiences would understand and relate to.

To make the new product’s complete and multi-benefit oral care solution shine clearly and compellingly on shelf, we had to understand how ‘complete care’ translated into semiotics for the brand’s target audiences. GSK identified two ‘interested’ consumer groups – different groups, different motivations. **‘Life controllers’** like structure and straight lines while **‘Healthy Balancers’** favour curves and rounded shapes. It was essential to identify the visual cues, and ultimately an icon, would instantly say ‘complete care’ to both groups.

Our design solution had to inspire these two groups of consumers; whilst conveying ‘complete’ and ‘multi-benefit’ alongside superior sensitivity protection.



Psycho-drawings that helped participants draw or communicate how they saw Completeness in their minds



The result of this was the 'Carousel' icon, a layered form that amalgamated translucent straight-sided segments with rounded corners and bevelled edges unified in a circular, dynamic form.

The Carousel icon unites the seven product benefits of Sensodyne Complete Protection which surround and shield the tooth. On the front of pack, they form a complete circle – a powerful symbol of complete care. On the back of pack, the benefits explode out, so that each is clearly identified – and consumers can easily spot the ones that matter the most to them.



Essentially visual shorthand for complete care, the Carousel is a flexible asset that works across touch points, from in-store displays to digital.

4. To make the brand more appealing and feel more premium to a wider audience.

The quality and finish of the pack was important here – the foil and embossing – to cue premium, whilst using a clean, simple design aesthetic ensures it doesn't look "special occasion" – with the hard-working carousel showcasing the 7 benefits of this specialist, yet everyday paste.

5. To create maximum on-shelf impact and stand apart from our competitors.

The simplicity of the design goes against the category norms, (most competitors have solid or bright coloured packs) creating a clean white space within the competitor set.



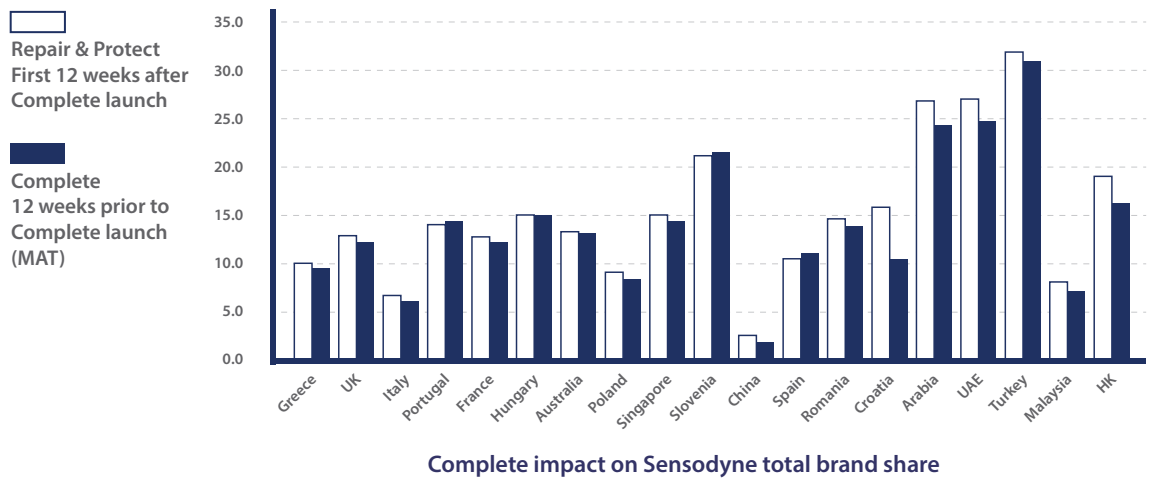
Word count: 497

Summary of Results

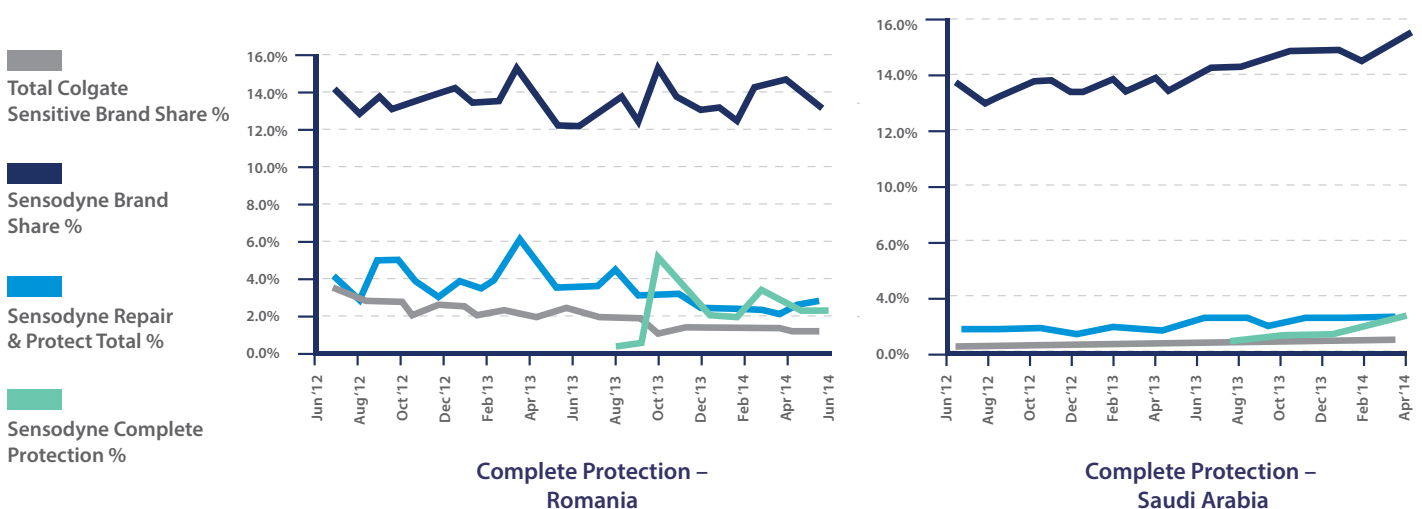
Growth in total Sensodyne brand sales and market share.

Already launched in 40 markets, and with another 4 launches in the pipeline this year, Sensodyne Complete Protection has bolstered Sensodyne's total brand sales by 15% since April 2013 leading to above expectation brand share figures.

Complete delivers incremental share in almost all markets



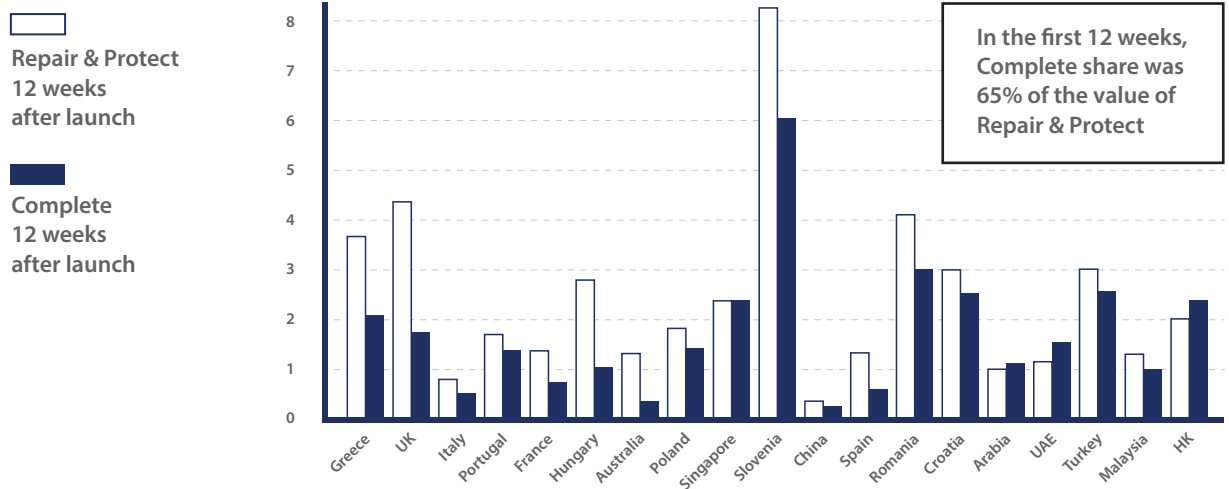
There are many examples of growth in markets, but here are a few examples:



Also worthy of note

Complete Protection is chasing Sensodyne's established brand

After just 12 weeks of sales, the sales of Complete Protection are already achieving market share figures equivalent to approx 65% of the value of Repair & Protect – which has been in market since 2011! This is way beyond forecast and even the most optimistic of expectations!



Complete share vs. Repair & Protect by market. (First 12 weeks)

65%



Complete Protection
market share of
Repair & Protect

To bring new users to the brand and to the sensitive dental care category

New customers to the brand

2/3rds of the sales of Sensodyne Complete Protection are new sales, from new users to Sensodyne – incremental sales for the brand. This means that just 1/3 of volume sales are due to cannibalisation of other products in the Sensodyne range – this was 50% lower than the figure built into GSK KPIs; and 50% lower than that they would usually expect with such new product launches.

Highlights

Bulgaria

8.5%

brand share increase (+1.5% pts)
via launch of Complete.

Saudi Arabia

+3%

gain in market share points
via launch of Complete.

Hong Kong

4%

share for Complete.

Romania

3%

share in first quarter
of Complete launch.

**Belgium and Netherlands
continue to perform fantastically
with incremental brand share
and a halo on Repair & Protect.**

To engage experts (oral healthcare professionals) in the brand.

The level of engagement of 'experts' in the oral hygiene is measured by what is called "expert detailing time". This literally means the amount of time that busy healthcare professionals are willing to spend in the company of GSK Sales Reps.

In the markets where Sensodyne Complete Protection was launched, 70% of expert detailing time is being dedicated to Complete leading to GSK reps having to increase their sales call time by +25%. This is unprecedented.

Other influencing factors

Launch Package

UK: To support the launch of Sensodyne Complete Protection, a communications campaign entitled 'The Great Sensitivity Test' launched in August 2013. 'The Great Sensitivity Test' encouraged product trial by initiating the conversation and encouraging the nation to re-evaluate their experiences with tooth sensitivity. This was a UK only event.

Global: Romanian launch was supported by an in-store merchandising package and a digital campaign. This was a standard package with spend equating to that for the Repair & Protect launch in 2011.

No other significant influencing factors have been identified.

Sources

Nielsen	April 2014
Kantar Worldpanel Total sensitive toothpaste	March 2014
Kantar Worldpanel Total toothpaste	March 2014
eSalesAid Analytics date	01.11.2013
Sensodyne Complete Global Launch Update, www.gsk.com	September 2014 – GSK