

# How Marketing Created a Billion Dollar Brand

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# Sensodyne: How marketing created a billion dollar brand

## Executive Summary:

This is the story of how a change in marketing strategy completely transformed the fortunes of Sensodyne.

Formerly a small player in a niche category, Sensodyne is now a \$1bn brand, in a category it has built into a significant 20% slice of all toothpaste. This stellar success was achieved by discovering a simple but important consumer insight.

28% of people suffer from sensitive teeth, but in 2000 Sensodyne had a penetration of only 5%. Most sensitivity sufferers weren't doing anything about it, and their need was unmet. The question was why?

Prior to its acquisition by GSK, Sensodyne's communications had made an assumption, which was stifling the opportunity. The assumption was that selling the benefit of Sensodyne would build the business.

GSK made a discovery: many people suffering sensitivity pain didn't know what it was, and certainly didn't associate its treatment with a toothpaste. The key to unlocking the opportunity was to let people know that their pain was a treatable condition, with a name, and then that Sensodyne was the answer.

By also ensuring that only Sensodyne owned the values of this newly built category, Sensodyne - not competitors - disproportionately benefitted from that improved consumer understanding.

Sensodyne is now the jewel in GSK's consumer healthcare crown, with double digit growth year on year. It commands a strong price premium, and is no:1 recommended brand by Dentists.

It is evidence of the power of marketing to unlock huge potential.

## In the beginning

In 2000 Sensodyne was a small toothpaste brand, distributed in pharmacies, with 5% penetration.\* It had been around for 30 years, and was quietly occupying a specialist corner of the toothpaste market, with barely any competitors.

In 2000 the company who owned Sensodyne came up for sale. GlaxoSmithKline (GSK) were interested enough to acquire the company, for the brand.

## GSK spotted an opportunity

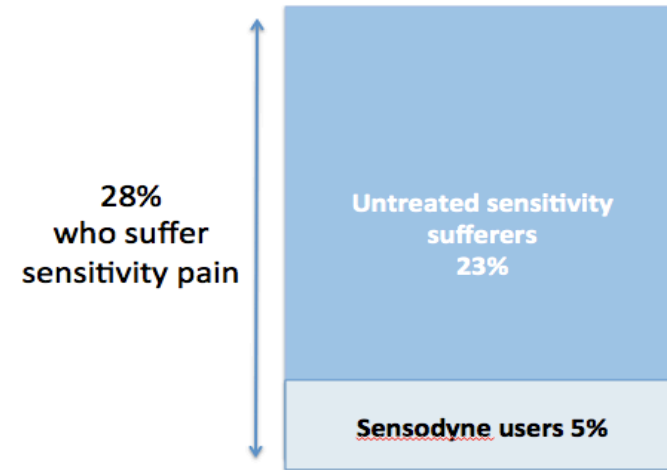
It might seem unlikely to be interested in such a small brand. But GSK had a good reason.

Although Sensodyne is a treatment for 28% of people\*\*, it had a penetration of only 5%.

It wasn't fulfilling its potential – leaving 23% of people with daily, significant pain.

A problem this big shouldn't be niche, it should be as mainstream as headache pills.

It was a classic unmet need.



## The nature of sensitivity pain

Sensitivity is caused by the exposure of microscopic holes (dentine) in your teeth normally protected by your gums or enamel. It means that when you eat or drink hot or cold things, typically, you get a sharp pain.

It can't be reversed, but the pain can be treated by sensitivity toothpaste – like Sensodyne.

\* Source: Kantar TGI

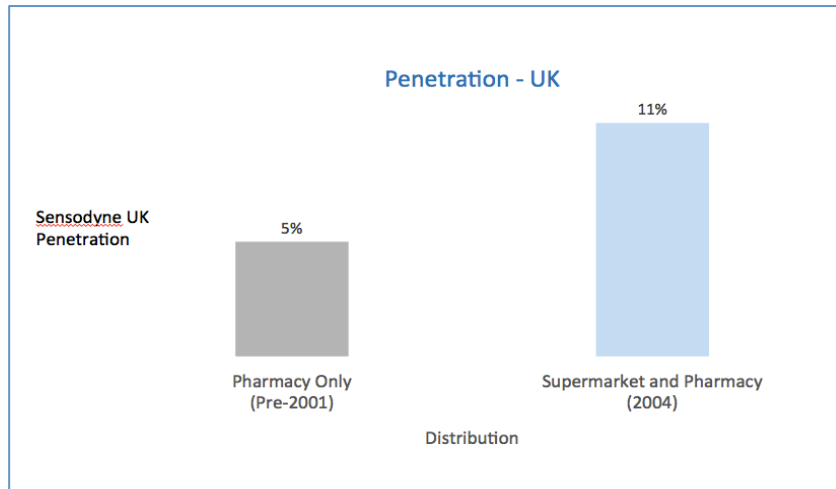
\*\*Source: Spleith & Tachou, Epidemiology of dentin hypersensitivity, Clinical Oral Investigations (2013) methodology, asked if people experienced the symptoms of hypersensitivity.

## First, distribution was improved

A product needed by nearly a third of the population deserves mainstream distribution. GSK added grocery to the brand's pharmacy distribution.

Sales responded, as people who knew they needed it, could now more easily find the product.

But the distribution-led gains plateaued in 2004, at 11% penetration.\* Still a long way short of the 28% who needed the product .



More needed to be done

\* Source: Kantar TGI

## It wasn't simply a question of raising brand awareness

Prior to 2000 and its acquisition by GSK, Sensodyne had run lifestyle ads, raising brand awareness.

'Why do I push for Sensodyne total care everyday?'

'It's got everything my regular toothpaste does.'

'And because it's Sensodyne...it helps stop the pain of sensitive teeth.'

'But if you stop using it...'  
(She turns on the hot tap)

(We see the silhouette of a man in a shower, he cries out in pain)

'...you can become sensitive to hot and cold again.'

'Use total care twice every day and you might not get a shock.'

'Sensodyne, total care for sensitive teeth'

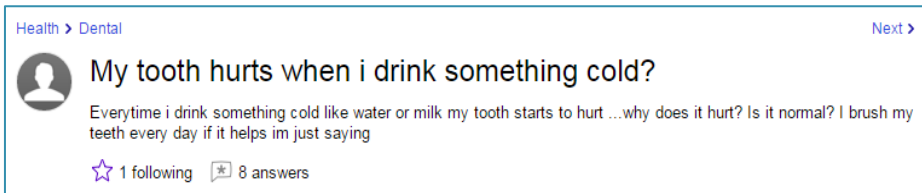
But GSK made an important discovery: it wasn't merely lack of brand awareness holding the brand back.

## Non users held the key

When people who were known to have the *symptoms* of sensitivity were interviewed, it transpired that many of them didn't know what the pain actually was.

Because it's not constant, and is triggered by food and drink, many of them were blaming what they'd just eaten. It wasn't evident to them that the problem was exposed dentine.

They thought it was a food problem, not a tooth problem.



They bore the pain and got on with life, albeit without the pleasure of a steaming hot coffee, or a scoop of ice cream, and in some cases, they took painkillers.

But the thing which didn't occur to them, was that a toothpaste might be the solution.

## Users had learned what the pain was

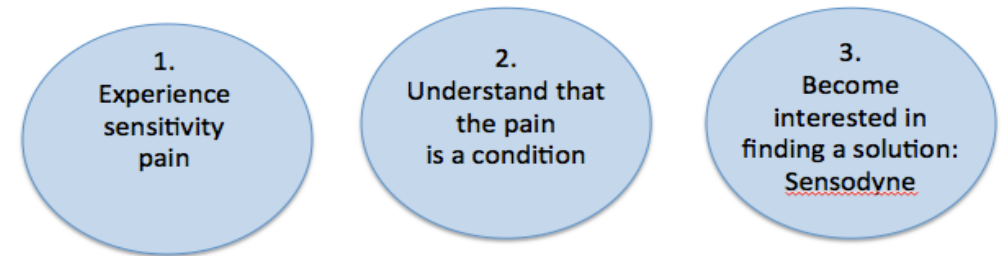
Those who had been using Sensodyne had found out – from their Dentist normally – that they had a condition, which could be treated with a toothpaste.

## A communications step had been missed

GSK realised that three steps were important.

- First someone needed to feel sensitivity pain.
- Next they needed to understand that the pain is caused by a condition.
- Then, and only then, would someone become interested in finding a solution.

Until now, communication had not tackled the second, crucial step. .



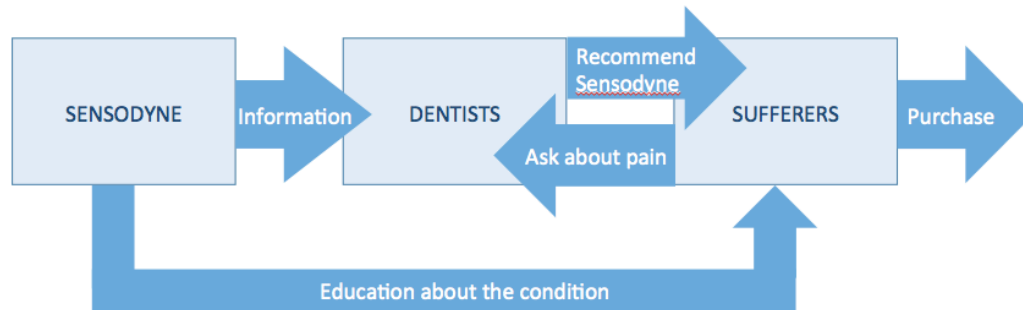
## The ‘Dentist effect’ needed boosting

Dentists were doing a good job of letting people know they had sensitivity pain. It just wasn’t happening very much.

Sufferers were blaming food and drink, not teeth, so weren’t mentioning it to their Dentist.

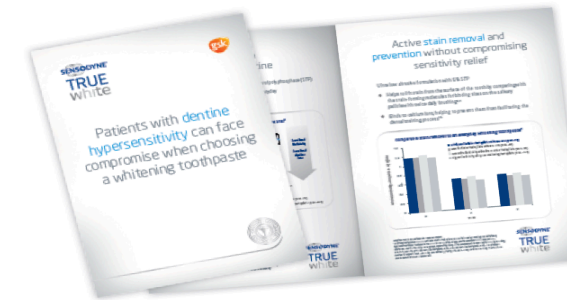
And so Dentists weren’t aware that so many people suffered.

Sensodyne needed to target both Dentists and sufferers, to create a two-way environment of better awareness of this oral health condition.



## Engaging Dentists

Sensodyne started a programme of education to Dentists. This programme let Dentists know how widespread sensitivity pain actually is. It also told them about Sensodyne’s product range, so they knew there was an effective solution they could recommend.



Example of Sensodyne materials shared with Dentists

Dentists will only recommend products they believe in. So Sensodyne deploys its GSK science heritage to find better proven ways to treat sensitivity, to build credibility with this expert audience. Significant investment in R&D, has resulted in an active NPD programme.

- |                       |                       |
|-----------------------|-----------------------|
| 2004 Gentle Whitening | 2009 Repair & Protect |
| 2006 Rapid Relief     | 2011 Complete         |
| 2007 Pronamel         | 2014 True White       |

**Consumer solution: bring the Dentist out of the surgery.**

People only go to their Dentist every 6 to 12 months, or less. We couldn't rely on Dentists to do the whole education job, especially when they might have other pressing oral health issues to solve in a consultation, such as cavities.

To speed up the process, and create a better aware cohort of sensitivity sufferers, consumer communication recreated a Dentist intervention.

We created a unifying global creative vehicle using real Dentists (not actors) to explain sensitivity authentically, in their own words. Where possible, they are filmed at their own practices, documentary style.

**The new formula: Sensodyne TV ad**

<p>Why do cold drinks hurt my teeth?</p>	<p>'A lot of people say they can't have cold drinks anymore because they don't want to feel that sensation'</p>		<p>It works by calming the nerve at the centre of the tooth'</p>
<p>Dr. Ateska Khanna, dentist, MSc, Vireo, London</p>	<p>'If the taste of ice cream or a sip of coffee causes a short sharp pain sensation then you may have a common problem called sensitivity' <i>Dr Ateska Khanna, dentist, UK</i></p>	<p>That's why dentists <b>RECOMMEND SENSODYNE</b></p>	<p>'A lot of people have come back and said...'</p>
	<p>'I say there is something simple that you can do to change this, try changing your toothpaste'  I recommend <u>Sensodyne</u> toothpaste</p>	<p>BY DENTIST RECOMMENDED BRAND FOR SENSITIVE TEETH</p>	<p>'...this works for me I don't want to use any other toothpaste.'</p>



The ‘Dentist’ creative vehicle runs in over 100 countries.

As ads are all local language, huge numbers of executions are continually created.

The grand total at the last count was over 4000.



### Creating and claiming category values

With this creative vehicle Sensodyne has defined and claimed the category’s values.

The brand is typically personified as a consultant in a white coat, and is associated with brand values such as expertise and authority.

### This has elevated the brand above Colgate in the sensitivity category

In most cases the ‘normal’ toothpaste Sensodyne would replace, was Colgate - much used and much loved family favourite. Colgate is a giant brand Kantar Worldpanel’s Brand Footprint study shows 65% of the world buys Colgate. The #2 brand, Coke, is bought by only 43%.

Colgate, however, remains associated with family and smiles, even in the sensitivity category. It is Sensodyne which conveys the trust and expertise consumers prefer for the treatment of a condition.

This has allowed Sensodyne to deflect a recent attack, when Colgate doubled their efforts behind Pro Relief in 2012. As a response Sensodyne launched Sensodyne Complete, and modernised the look and feel of the existing vehicle. Sensodyne’s share continued to rise in the UK, whilst Colgate’s fell.

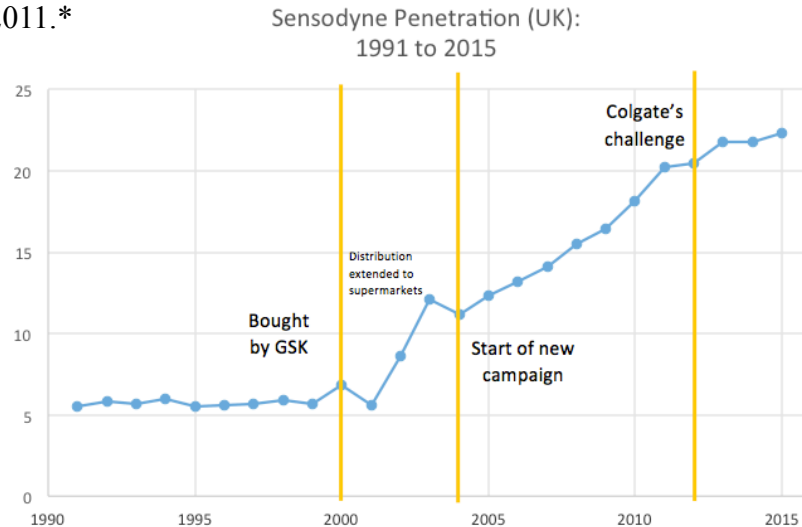


### Business results: stellar growth of category, and brand

Sensodyne's value has grown double digits every year, from niche in 2000 to over \$1bn globally today.

This makes it GSK's biggest brand not just in oral health, but amongst all its consumer healthcare portfolio.

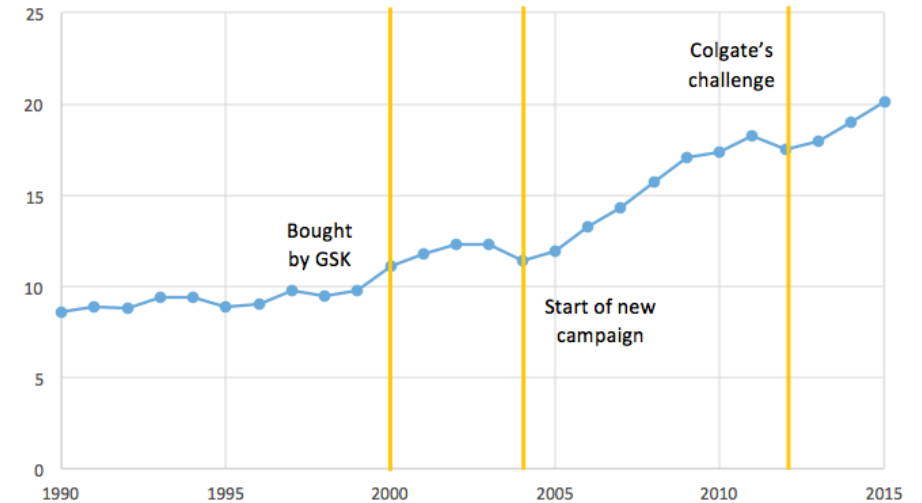
In the UK, where we have the longest running data, dramatic growth in penetration is evident. Distribution improvements led to one period of uplift, and the Dentist campaign ushered in a further period of growth, despite the attack by Colgate in 2011.\*



\* Source: Kantar TGI

Inexorable growth in share of the toothpaste market in the UK, mirrors growth we have seen in other markets globally .

Annual share of UK toothpaste market value: Sensodyne, 1990 - 2015

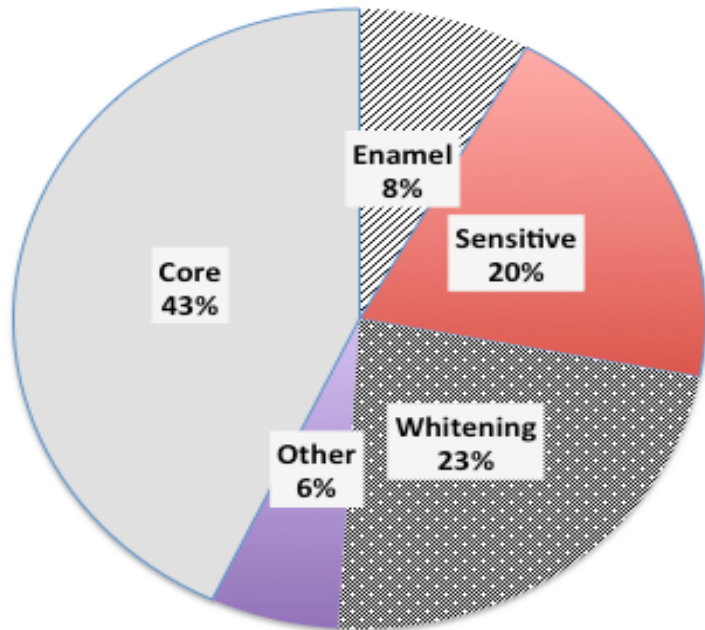


Source: Nielsen

### Category growth

The sensitivity category has grown from a niche to 20% of the toothpaste market in the UK\* one of Sensodyne's key markets.

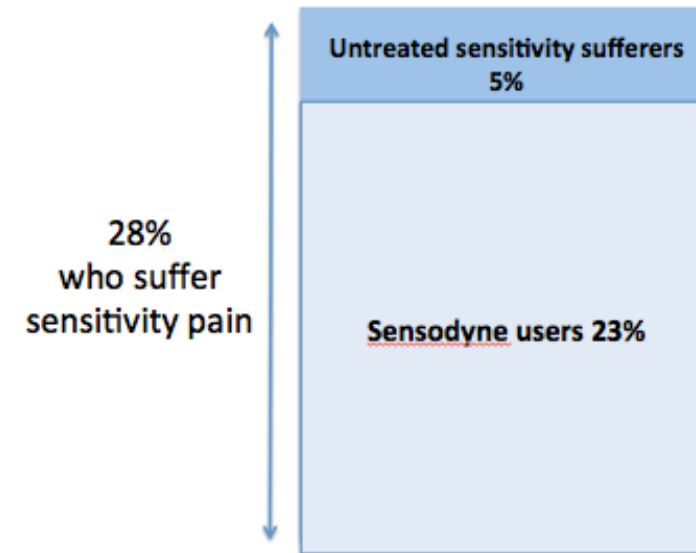
And within this category, it is leader, with 65% value share\*\*



\*Source: Nielsen  
\*\*Source: Nielsen

The growth in UK penetration from 5% to 23%\* is a reversal of the picture before GSK bought the brand.

There are now far fewer people who leave their sensitivity untreated.

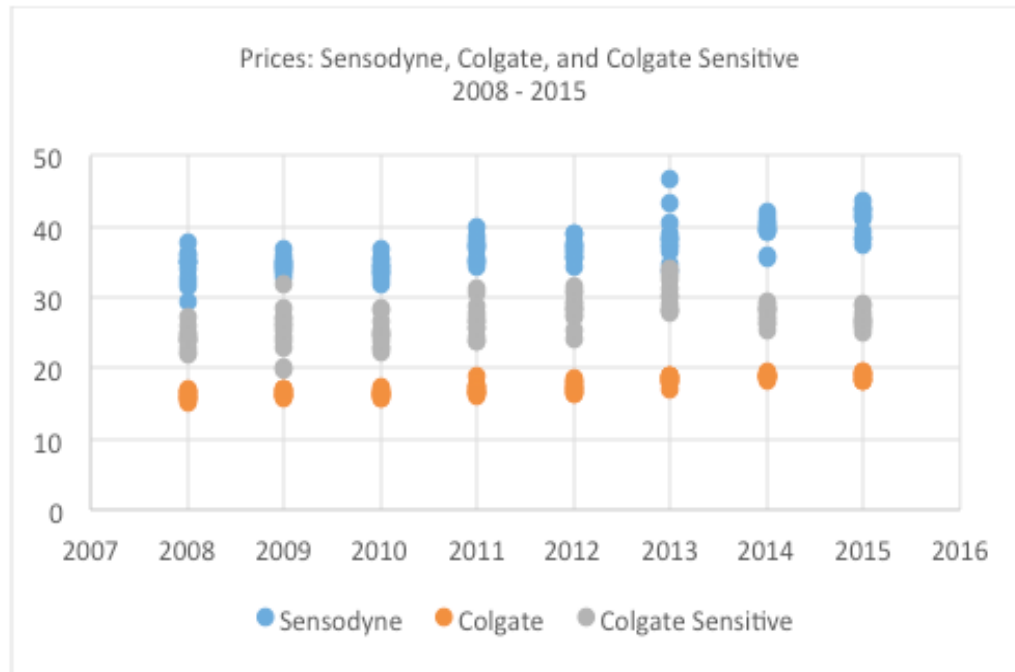


\*Source: Kantar TGI

Sensodyne is the leading brand of sensitivity toothpaste in the world, and no:1 Dentist recommended in many markets.

And the brand sustains a price premium vs Colgate in the sensitivity category.\*

Retail price at counter (normalised)



### Marketing created the success

Sensodyne’s impressive sales trajectory can only be explained by the shift in marketing strategy.

Penetration growth wasn’t created by price cuts – price is at a premium. Brand growth wasn’t explained by a sudden surge in sensitivity cases - condition prevalence is constant. And the drip feed of innovations were developed to the new brand strategy.

\*Source: Nielsen

# Conclusions

To grow from niche to a brand worth more than \$1bn, with constant year on year growth, demonstrates the power of Sensodyne's shift in marketing strategy.

Sensodyne identified and overcame its real enemy – lack of awareness of the condition – and put in place a communications step which had previously been missing: education that the pain is an oral health condition.

It deployed a communications model to engage both consumers and Dentists. By bringing the Dentist out of the surgery and into an advertising campaign, Sensodyne captured the core category values of expertise and authority.

The communications model has been strong enough to withstand attack by one the world's most popular brands - Colgate – and the brand looks set to continue to grow round the world.

And thankfully now many more people can enjoy their ice cream and hot coffee unimpeded!

1390 words