



**Changing The World's Oral Health
By Thinking Outside The Box**



Selling toothpaste like technology

**A Submission for the Marketing Society
Excellence Awards 2018**

Category: Global Brand Marketing

Changing The World's Oral Health By Thinking Outside The Box

EXECUTIVE SUMMARY

parodontax (Corsodyl in the UK) is a brand specializing in gum disease; the world's biggest oral health issue. It's a nasty infection caused by bacteria build-up along the gum line that affects one in three adults globally and has been linked to systemic health issues like heart disease and diabetes.

But the challenge is no one cares about their gums.

Culturally teeth are the rock stars of oral care for the Instagram generation. The category is consolidating around generalists. And big brands have tried to crack the problem but failed.

In short toothpaste for gums is an oral care oxymoron.

To grab attention previous work had catastrophized the issue but this just drove a wedge between the consumer experience and the brand.

In 2015 GSK decided parodontax needed a global re-set to reconnect the consumer with the brand.

A small brand globally we needed to think outside the box and therefore turned to a framework for driving behaviour change in technology.

The global marketing programme focused on 5 levers to increase motivation and make the brand more accessible.

Evidence suggests this is changing category behavior, making the need for a specialist toothpaste for gums, compelling.

Today we are growing at +35%, 7x faster than the market globally¹³.

We are the fastest growing global toothpaste, well on our way to doubling sales by 2021.

We think the story of how we are changing the world's oral health and lessons learnt along the way is worth sharing with the wider marketing community.

A Big Issue No One Cares About

parodontax is a specialist oral care brand, dedicated to gum health.

Primarily a toothpaste it is known in the UK as Corsodyl.

In early 2015 GSK earmarked parodontax as a global strategic priority.

The global business plan was aggressive:

- CAGR of +15% (previous year growth was +4%¹)
- Grow market share
- Double sales value by 2021.

The world's biggest oral health issue

1 in 3 adults globally suffer from gum disease², an infection caused by bacteria build-up along the gum line.

The consequences can be nasty: patients develop gingivitis (a key sign is bleeding from your gums), advanced gum recession called periodontitis and eventually tooth loss.

In developed countries more teeth are lost from gum disease than cavities or tooth decay combined.

And scientists have established a causal link it to systemic health problems like heart disease, diabetes and cancer³.

Examples of mild to advanced gum disease ...



But...no one cares about gums.

Teeth are the rock stars

Culturally teeth dominate oral care - particularly for the selfie generation. Even those with gum disease are more worried about looking after their teeth.

It's all about their teeth, even for those with bleeding gums

Rank order of drivers of oral care
(Aggregated scores across US, DE & RO)

| | Ignorers Experienced some bleeding in the last 6 mths but don't believe it's a problem | Copers Experienced some bleeding in the last 6 mths & know it's a gum problem |
|--------------------------------------|--|---|
| All round oral care | 1 | 1 |
| Treatment of tooth sensitivity | 6 | 2 |
| Long lasting protection for my teeth | 2 | 3 |
| Prevents cavities and tooth decay | 3 | 4 |
| Cleans teeth effectively | 4 | 8 |
| Helps stop bleeding gums | Not in top 10 needs | Not in top 10 needs |

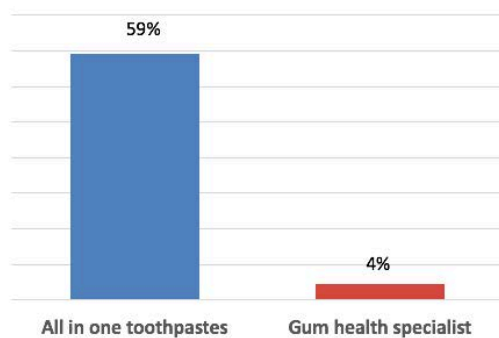
Source: Ipsos Gum Health Needs & Barriers – Nov 2015

Market going the wrong way

Growth is largely in all-in-one formats like Colgate Total and Crest Complete – 59% of value in 2013¹.

Generalist Toothpastes Dominate

Oral Care Need States - share of global sales value - 2013



Source: Nielsen

Major brands have tried...and failed

Colgate Pro-Gum Health launched in 2012 with heavy A&P investment.

By 2015 they had pulled investment in US and were being de-listed.

Similarly Crest Pro-Health has a gum variant with very small share in the US.

We are small

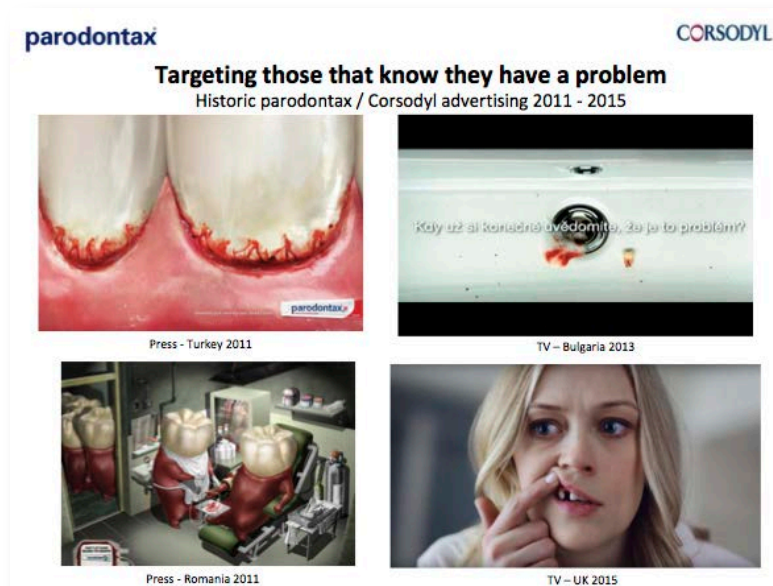
Despite selling in 60+ markets, parodontax has only 1.1% global share of toothpaste¹.

Gum health in total represents only 4% of oral care¹.

If Colgate and P&G with their marketing muscle and nearly 50%¹ of the £36bn⁴ market between them had failed to unlock gum health, what chance had we?

A Perceptual Gap

Historic communications catastrophized bleeding gums, dramatising tooth-loss.



Yet most consumers with early gum disease see only a little blood when they brush. Unless advised by a dentist, they don't know they have gum disease. Many consider blood as a sign of vigorous brushing, therefore positive. Dramatizing lots of blood made lighter sufferers believe *their* experience was probably normal.

Similarly tooth loss is the ultimate impact but for most dentist intervention makes it unlikely. Focusing on it positioned parodontax as a niche highly medicalised solution.



In essence the brand and consumer were pulling in different directions. To bring them together we needed to change category behavior...we needed people to understand and care about gums.

Thinking outside the box: a framework for changing category behaviour

To change a category you need to think outside it.

B.J. Fogg is the founder of the Stanford Persuasive Technology Lab.

He's also a psychologist specialising in behavior change; principally around technology but his thinking has been adopted in other circles.

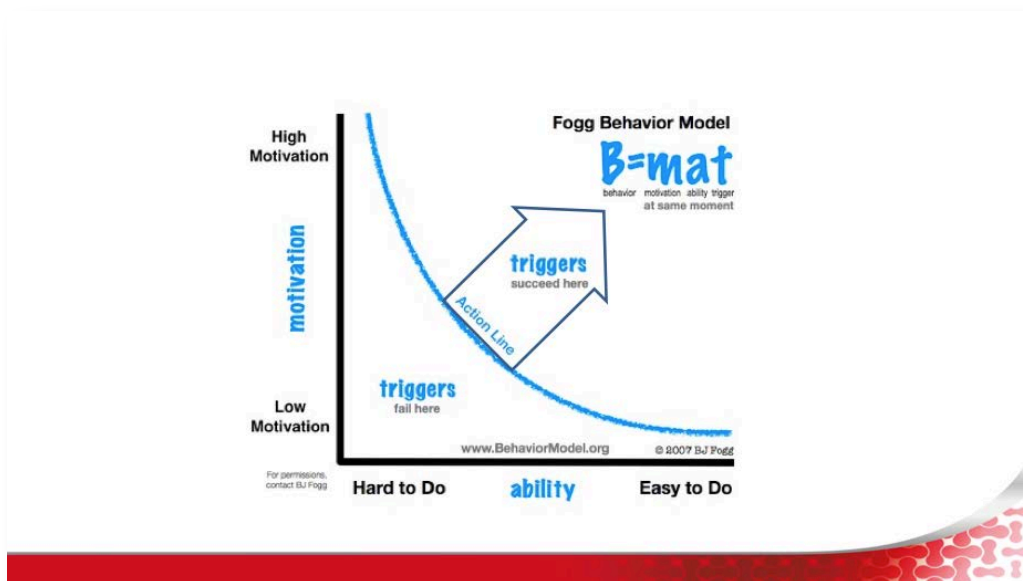
In 2011, the World Economic Forum's Wellness Workplace Alliance selected the Fogg Behavior Model as their framework for health behavior change.

The model suggests to secure change you need:

Trigger + Motivation + Ability

We already had a clear (if currently inert) trigger – blood in the sink. What we needed was motivation and an easily accessible solution.

That's what we focused our marketing on.



Our Global Strategy

To build motivation and make the brand accessible we concentrated on five levers:



The Brand Idea

With health and well-being there's a gap between intentions and behaviour.

With busy lives consumers prevaricate and trade-off issues that don't feel a priority – bleeding gums is one of these. It isn't a big deal because it feels the consequences are a long way off.

To motivate we needed an immediate need to act.

Gum disease is embarrassing⁵

The issues sufferers describe in most detail are social side effects of the early symptoms – the embarrassment they feel from bad breath and bleeding.

The Social Impact of Gum Disease

"When I go to kiss my wife on the mouth, I get cold feet – I'm worried there'll be blood on her lips."

– Onur, Coper

"When I get my eyebrows done, I try not to exhale – I close my mouth. It's a nuisance, a shame, an embarrassment."

– Özlem, Ignorer

'I never floss in front of my husband, because it is a bloody mess and it's embarrassing. I don't want to spit in front of anyone. Maybe that is why I brush really fast– to get it over with and get rid of the blood.'

Maria, Coper, US

'It's embarrassing hygiene-wise for anyone to be able to see that your mouth is bleeding. It makes it look like you don't brush often enough and that you're not worried about how you look - in a bad way.'

Christopher, Coper, US

*'Image that comes to mind when I think of bleeding gums –
Ewww, bro, do you even brush?!'*

Anthony E., Coper, US

Source: Gum Disease in Turkey – Firefish Research, Gum Health Target Illumination – Egg Strategy

But while fresh breath and confidence are drivers of oral care behaviour⁶ they're also owned by mainstream brands: Colgate Total⁶ etc. If we focused on these we'd be unlikely to support our 200% price premium¹.

Our opportunity: Link the immediate to the long-term

If we reframed the superficial but compelling mainstream oral care concerns of bad breath and avoiding embarrassment as indicative of the onset of a much bigger more devastating problem this would:

- Increase immediate motivation to act and de-normalise bleeding gums
- Increase accessibility by broadening parodontax's relevance

The strategic idea

Gum disease is a journey not a destination. It starts off with embarrassing symptoms and over time just gets progressively more devastating.

Brand Re-set

Our new strategic idea was the fulcrum for a global marketing programme:

1. Pack First

With the belief that the pack is the brand distilled in the hand we started with our pack.

parodontax retails at an average of 200% the category price and 42% of decisions in the category are made in-store⁶. Our identity didn't support this premium or reflect our specialism.

It was replaced with a new core range, producing +25% purchase intent in research⁷.

The design elements were then used as the visual springboard for the new communications programme – encapsulated in our consistent brand promise *'Leave Bleeding Gums Behind'* which means the pack itself becomes a consistent reminder of what the brand stands for.



2. Connecting With Consumers

Received wisdom was that the threat of tooth loss was the best way to create cut-through.

But our instinct was threat as a tactic while undoubtedly dramatic could leave consumers feeling hectorred and angry at being sold to through scare-mongering.

We felt we needed to shift the tone of the advertising, have an adult to adult conversation to educate consumers about gum disease. More like Home Office or Public Health communications than toothpaste advertising.

The agency creative team bought the idea alive using the metaphor of an everyday train journey going inexorably in the wrong direction.

It was a simple construct, globally universal and it resonated with non treaters⁸.

Qualitative reactions to Journey advertising

"This fits with what I need. It shows me the consequence at each station and it goes on and on but it's easy for you to make it stop."

Male Ignorer – Thailand

"This is a problem I shouldn't ignore. It's not a big deal but it will become something to worry about. It's a warning sign it can creep up on you."

Female Coper – Japan

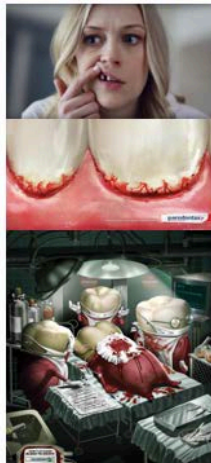
"I can see myself in there – I'm at the early stages"

Male Ignorer, Germany

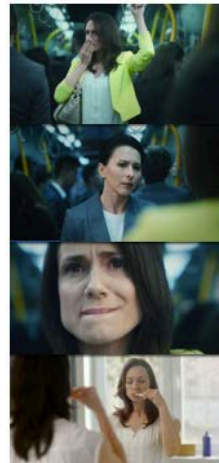
Source: Spinach Creative Development Research; DE, Ro, Th, UK, Jap

The Comms Creative Shift

From: the threat of a serious health condition with extreme symptoms



To: education about an issue that needs to be dealt with to avoid it getting worse

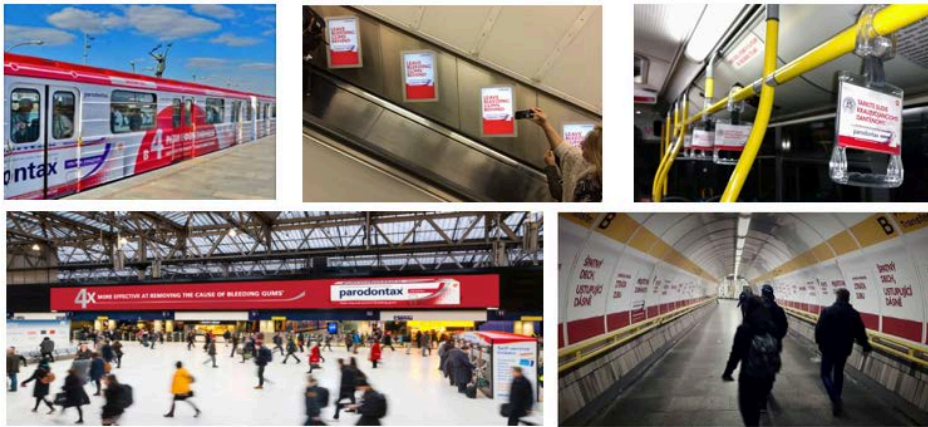


This wasn't an issue our audience were seeking out. Our channel strategy reflected this. We had to interrupt them and grab attention – TV and ivideo did the heavy lifting on this.

Transport media and morning day parting allowed us to get close to the moment of truth - brushing and seeing blood.

Markets really got on-board. They wrapped trains, buses and even a Tuk Tuk. We dominated the UK's busiest train station, Waterloo. And branded tram grab rails, sequential escalator panels, cross track posters and transport tunnels.

Transport Media: Close To The Moment of Truth



3. Digital driving understanding

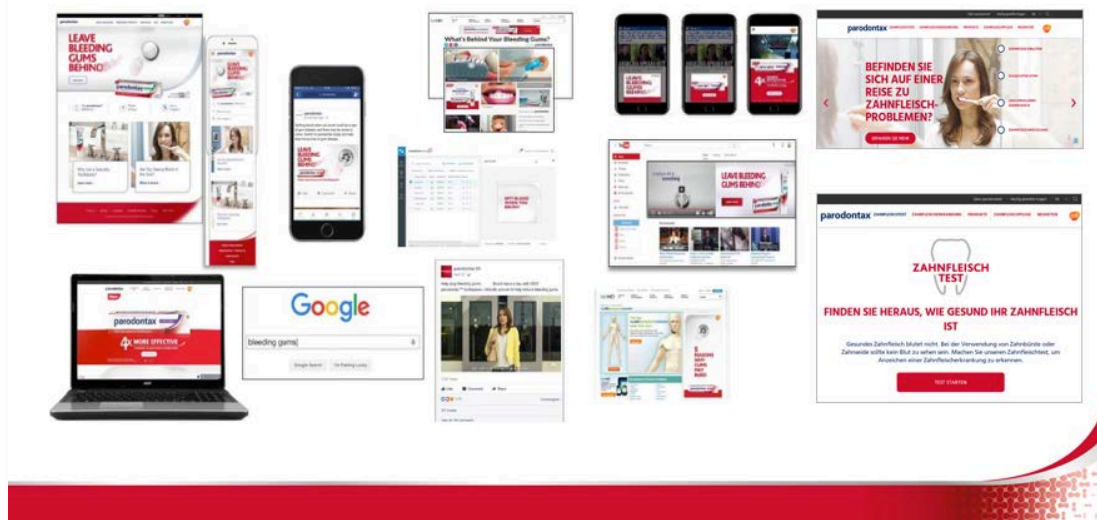
Having secured attention we needed to maximize motivation by helping people understand what causes gum disease and the options to treat.

We developed a master website with content about the condition, FAQs and an online diagnosis tool. To date we have built over 20 local market sites.

For those worried and seeking information we dominate relevant search terms.

Programmatic display targets consumers in at risk groups. Dedicated iVideo and display retargets consumers who had engaged in content but not purchased.

Driving Condition Understanding



4. Profile with professionals

Dentists stimulate 1 in 3 first time purchases⁹ but our issue is exposure - dedicated sales teams visit once a year only spending a few minutes talking about the brand.

It's easy to forget experts are consumers too – they see our advertising on their way to work, on their TV, in their social media feeds.

So we took the consumer idea and interpreted it for experts – ***The Journey Towards Healthy Gums***, creating dedicated materials, diagnosis tools and sampling units.

Consumer advertising doubles up as year round salience for experts, step-changing our return on expert investment.

Upping Our Profile In The Expert Channel



Expert Advertising



E-detailing tool



Expert Events

5. Unlocking Innovation

Journey gave us a strategic platform for NPD with a clear pipeline of new products tailored to different stages and needs of consumers as gum disease progresses.

The first of these; *Complete Protection* from parodontax, has improved brand purchase intent by +28%¹⁰ and is on shelf in markets from January 2018.

Our intensive treatment products previously treated separately (even with its own brand heart) has been brought into the brand family.

Our modelling indicates this is already working for us commercially with a halo effect from toothpaste to mouthwash in the UK¹¹.

Bringing Intensive Treatment Into The Brand Platform



The re-set rolled out in September 2016.

Japan was the first market to go live – to date 42 markets around the world have relaunched.

Overleaf we detail our results to date globally and across our commercially key markets.

Results

Comms a catalyst

Our pre-testing metrics were outstanding¹² giving us confidence we were on track.

The comms created:

✓ **A compelling reason to act**

Consumers took-out that bleeding gums are a sign of worse to come, well above norm.

✓ **A specialist positioning**

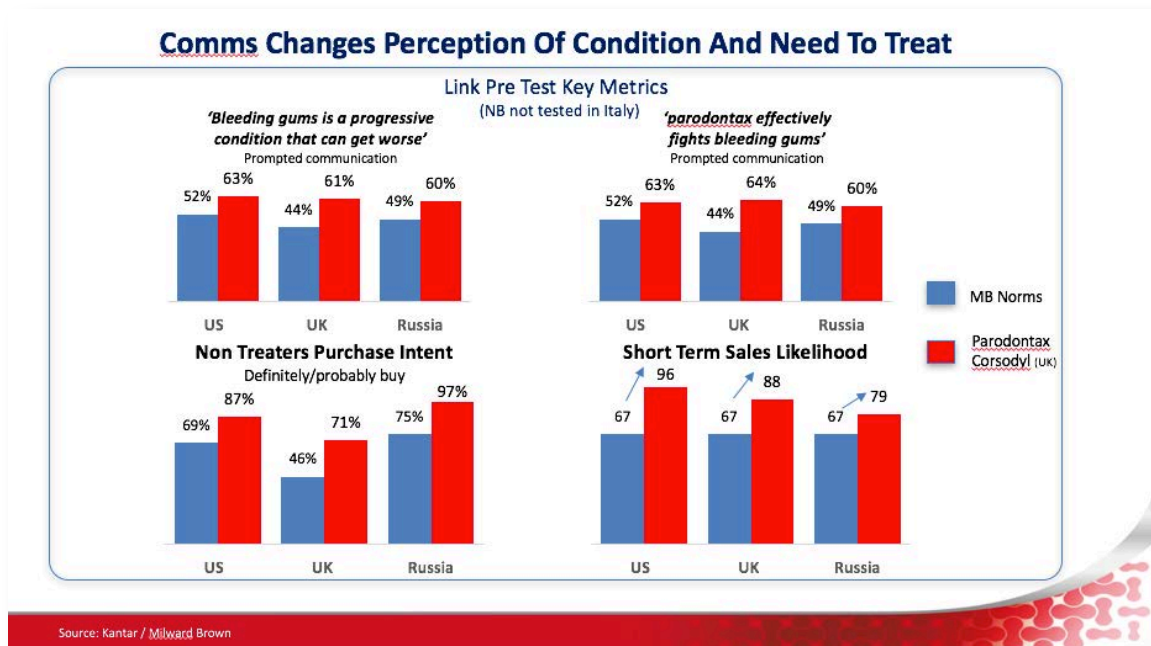
parodontax is acknowledged to effectively fight bleeding gums

✓ **Intent to treat**

In a category about teeth, consumers started to consider a toothpaste for their gums.

✓ **A new pre-testing benchmark for impact**

Only 33% of ads globally hit the Millward Brown benchmark of 67+. We comfortably exceeded this and the STSL of 96 in the US is the highest ever for GSK.



Marketing programme starts to change behaviour

✓ Consumers are buying a toothpaste for gums

As the re-launch rolled out sales soared.



✓ Share is growing

In our key markets

US - Success where other brands failed

We've launched, creating a £12mn business claiming 1.2% share in the world's most competitive oral market in just 9 months¹³. We are already in 2% of all American homes and have repeat rates of 35%¹⁴.

UK - Incremental business

We've doubled our market share (2.4% vs 1.2% last year), building a business worth £8mn in toothpaste whilst maintaining core mouthwash sales¹³.

Italian Market leadership

In Italy we've overtaken our nearest competitor to be number 1 in pharmacy and attain our highest ever market share – 4.4%¹³.

Highest ever market share in Russia

We've hit and sustained our highest ever market share – 3% of the toothpaste market¹³.

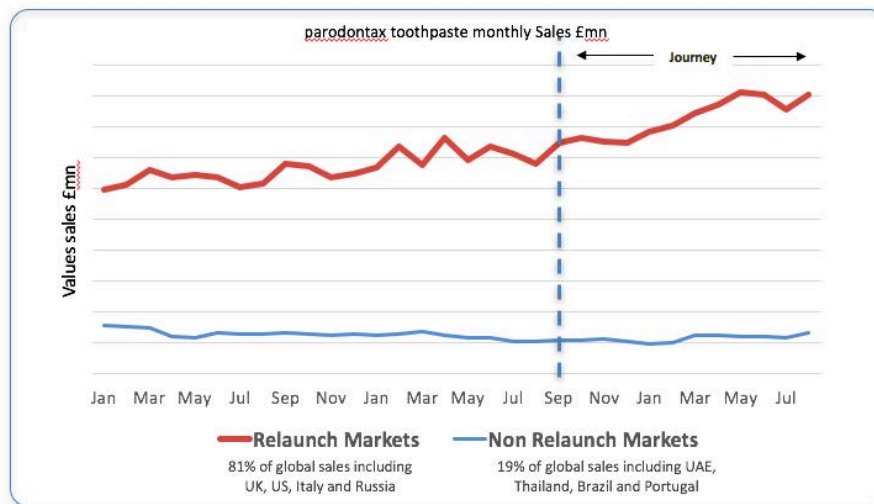
✓ **Marketing driving growth**

Where we've re-launched there's a marked sales increase.

Markets that have yet to launch are flat.

Local GSK markets believe in the model and are diverting resources from other brands.

Markets that have rolled out the relaunch programme are growing, those that haven't are flat

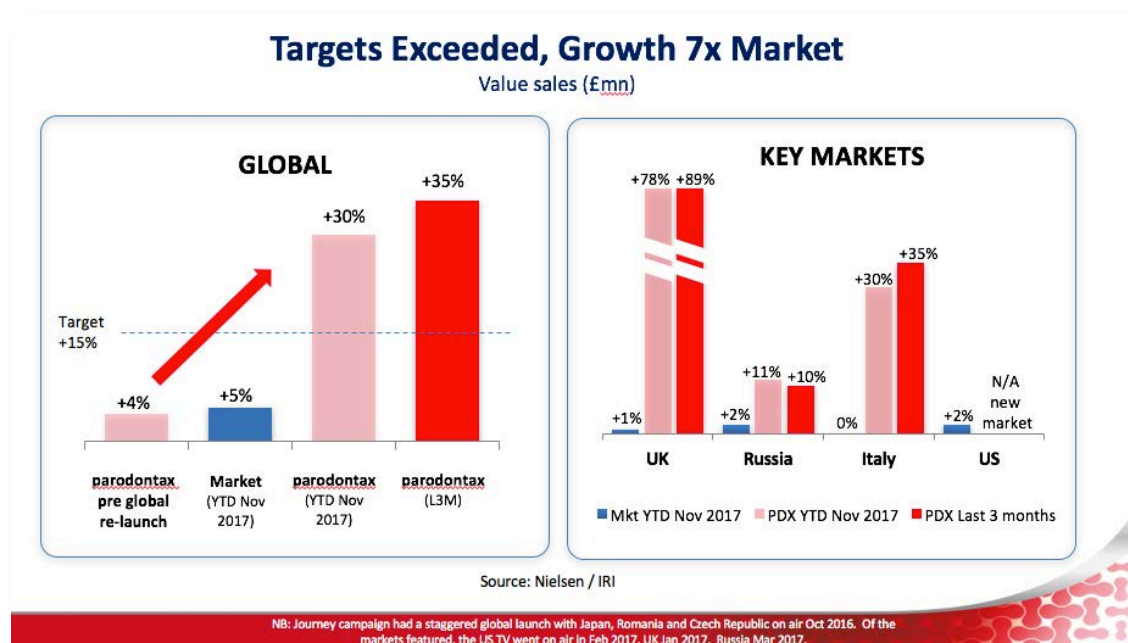


Source: Nielsen

Commercial step change:

✓ Targets exceeded

In 2015 parodontax global value growth was just 4%. CAGR target is +15%. Since the global re-set value sales are +30.4%¹³.



✓ Growth is accelerating

Last 3 months is +35%¹³. 9 markets are growing at over 50% yoy, many more enjoying their highest ever market share¹³.

Globally the brand is growing at 7x the market¹³. In fact parodontax is the fastest growing global toothpaste brand¹³.

✓ On-Track Long Term

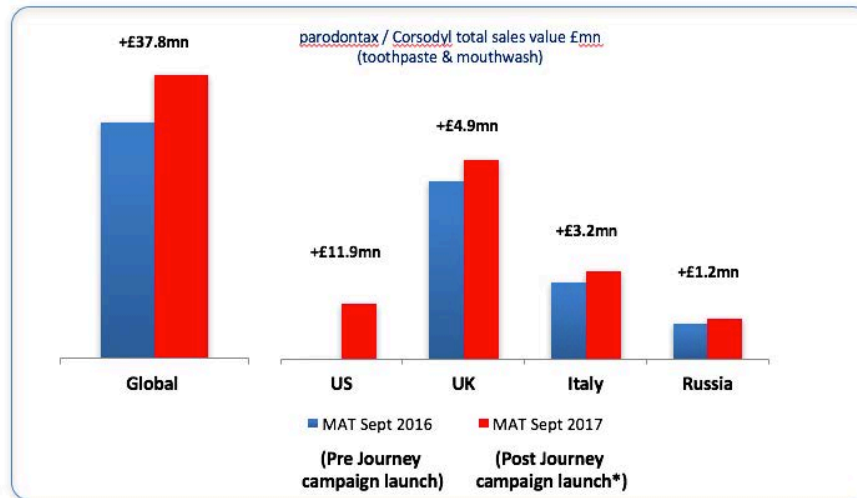
The business is worth an extra £40mn year one¹³.

Internally there's confidence we will comfortably reach our 2021 target of doubling sales.

'We've had impressive commercial results from our brand re-set due in large part to an outstanding marketing and comms model. We're very ambitious for this brand and have plans in place to accelerate our commercial momentum.'

Tom Nester-Smith – Global Business Lead Gum Health

Global Value On Course To Double By 2021



Source: Nielsen / IRI (US)

NB: Journey campaign had a staggered global launch with Japan, Romania and Czech Republic on air Oct 2016. Of the markets featured, the US TV went on air in Feb 2017, UK Jan 2017, Russia Mar 2017.

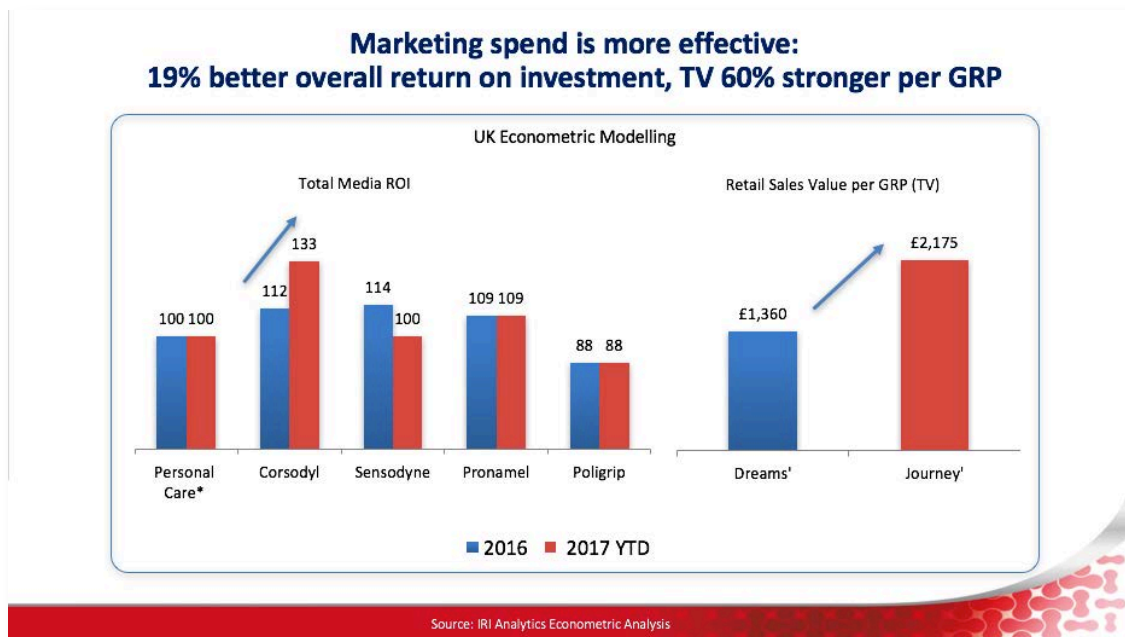
Is This Really Marketing Excellence?

Are the results we've shown just due to:

Spend?

parodontax has enjoyed extra spend but this has largely been invested in geo-expansion.

Econometric modeling in the UK, an existing market with a flat budget, demonstrates the marketing model is working much harder. TV generates 60% more sales value per GRP and the overall ROI is 19% higher¹¹.



Distribution?

Distribution in the UK and Russia is flat. Italy is +7% but sales are +35%¹³. In the US, sales per point of distribution have accelerated - 41% higher in August 2017 vs April¹³.

Price?

Pricing is flat 2016 – 2017 and remains 2x the market average¹³.

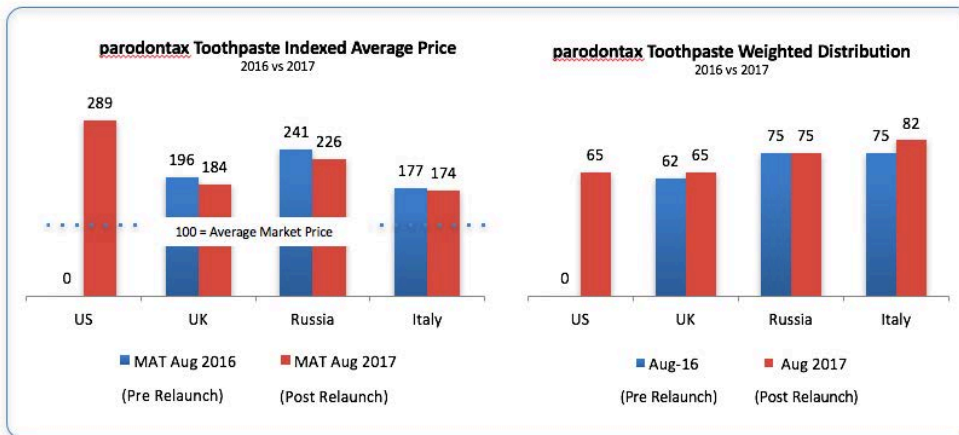
New markets?

The US launch has been important (31% of incremental value) but even stripping out its effect the brand is still up 20%¹³.

Claims?

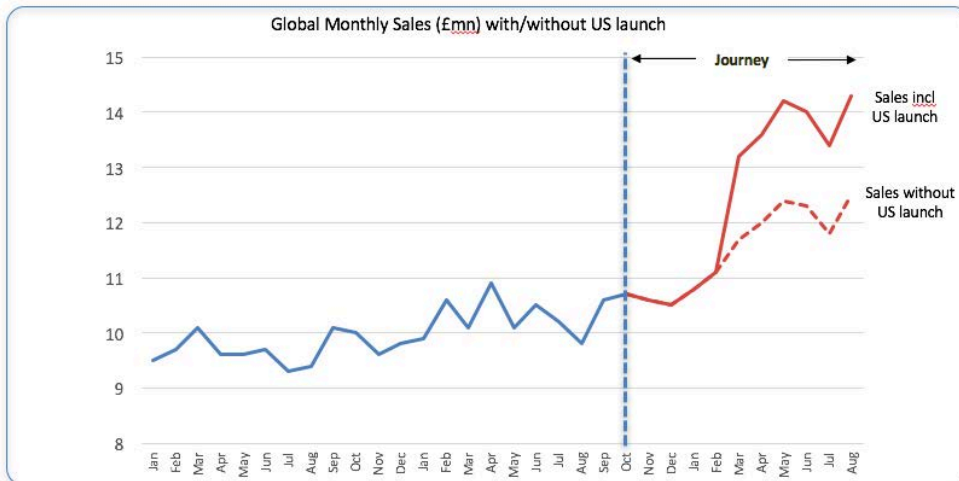
No regulatory change 2016/17

parodontax price & distribution



Source: Nielsen/IRI

parodontax / Corsodyl



* Journey campaign had a staggered global launch with Japan, Romania and Czech Republic on air Oct 2016. The US TV went on air in Feb 2017, UK March 2017, Italy April 2017, Russia March 2017.

Source: Nielsen / IRI

In conclusion

The brand re-set has given us real momentum within the business and in the category. There's clear evidence that we are getting consumers to buy toothpaste for gums.

It shows the value of thinking outside the box, using learning from technology to change the world's oral health.

Word count: 1991
(excluding tables and charts)

Sources:

- 1 – Nielsen – multi-market retail audit data for GSK
- 2 - Omnibus covering 19 markets, sample of 1000+ adults 18+ in each market – Dec 2014 Ipsos
- 3 - <https://www.perio.org/consumer/gum-disease-and-other-diseases>
- 4 - Euromonitor Global Oral Care Report – 2013
- 5 - Qualitative research in Turkey & the US with gum disease sufferers - Firefish Qual - Nov 2015 / Egg Strategy - Jan 2016
- 6 - Oral Care global consumer segmentation (sample 1000 18+ adults in each of UK, US, Germany, Brazil, China, India, Saudi) fieldwork Jan/Feb 2011 - Added Value
- 7 - Pack Express research in Germany and Poland - Join The Dots, Apr 2016
- 8 - Qualitative research amongst a sample of gum symptom sufferer non-treaters (seen blood when they brushed in the last 6 months but not bought a dedicated product to address), 15 groups across Germany, Romania, Thailand and Japan, fieldwork February 2015 - Spinach research
- 9 - Usage and Attitude study in Hungary conducted in June 2014 among a sample of gum disease sufferers indicated 1 in 3 first time purchases of paradontax are stimulated by dentist recommendation - Ipsos Research
- 10 – Complete Protection concept test in Italy – Ipsos Research Dec 2016
- 11 - Econometric modelling using UK national sales data from Asda, Coop, Sainsburys, Tesco, Morrisons, Waitress, Boots, Superdrug, based on analysis of sales and influencing variables covering 104 weeks ending 17th June 2017 - IRI Analytics
- 12 - Quantitative research using Link test methodology. UK - online research, sample 150 adults 25-70yrs with bleeding gums, fieldwork September 2016. US - online research, sample 150 adults 25-65yrs with bleeding gums, fieldwork October 2016. Russia - face-to-face research in Moscow, sample 150 adults 25-65yrs with bleeding gums, fieldwork February 2017. Millward Brown
- 13 - Retail audit data, continuously collected from a representative sample of supermarket and pharmacies - Nielsen/IRI
- 14 – IRI Panel - Total US All Outlets 44 Weeks Ending 12/31/17