



Sunscreen Competition Heats Up As Consumers Stay Indoors

A brief analysis of the sunscreen market,
powered by Yogi

The Yogi Platform helps companies centralize, organize, and analyze consumer feedback data spread across reviews, surveys, emails, and more

Introduction

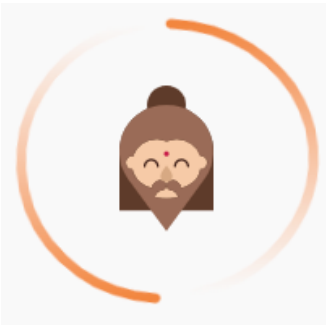


Centralize



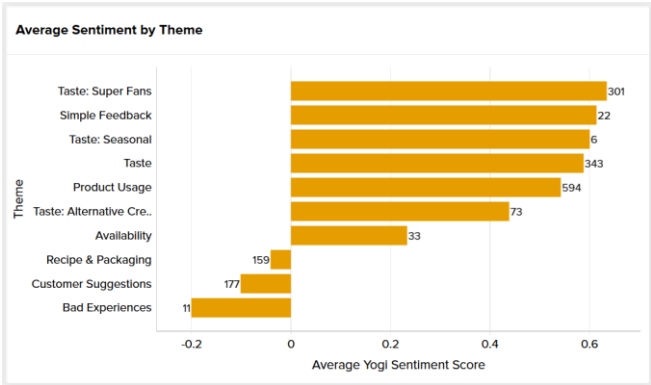
Yogi pulls from *both* public and private sources to build a centralized feedback repository that can be searched and filtered.

Organize



Yogi uses advanced AI and Natural Language Processing technology to read through and organize the data based on sentiment, keywords, topics and more.

Analyze



Yogi's intuitive interface makes it easy for users to sift through data and reach granular insights that lead to tangible business improvements.

Yogi follows the strictest security standards including encryption, 3rd party audits, and SOC-II compliance.

Yogi analyzed 11,525 product reviews for 16 popular sunscreen brands across 14 parent companies

Introduction

Products Analyzed



Research Questions

ECOMMERCE

What can we learn about the eCommerce market for sun protection products? Which brands are doing better than others and why?

PRIVATE LABEL BRANDS

How are private label brands performing compared to branded offerings? How are they differentiating?

CORONAVIRUS

What changes has Covid-19 caused in the sunscreen market? How has it impacted consumer preferences and shopping habits?

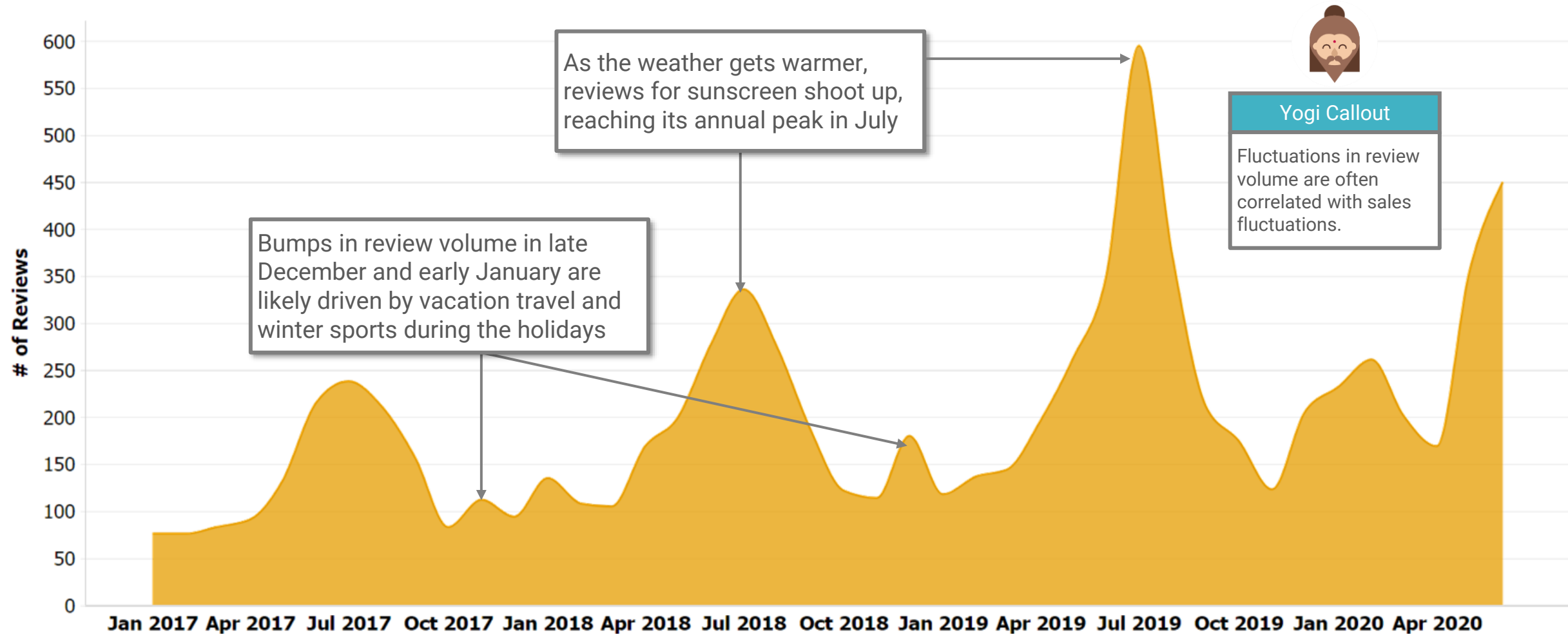
Yogi's use cases range from broad market research to more targeted competitive analysis. Below are summary findings on the sunscreen market

Summary



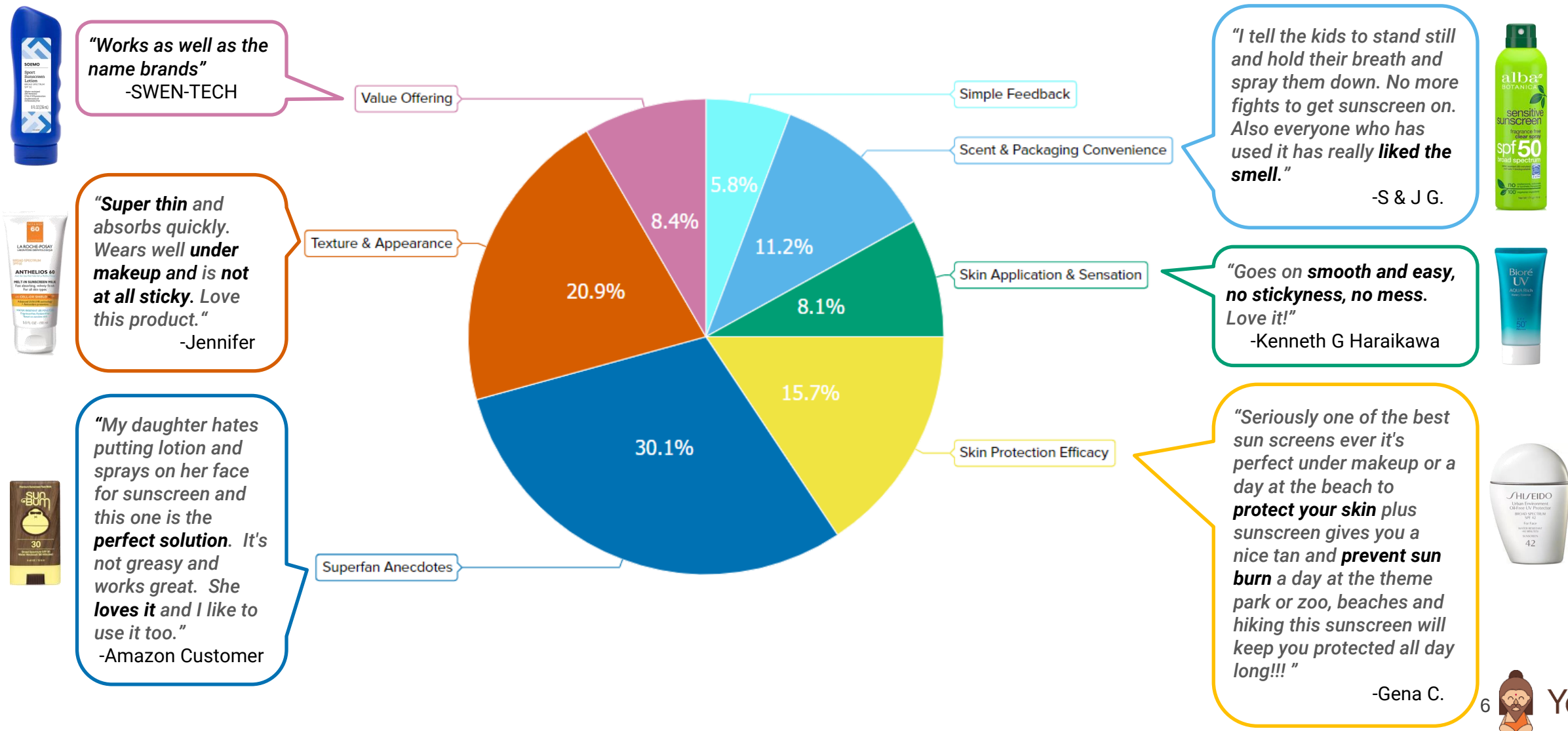
- The U.S. sunscreen market is **crowded and fragmented** with numerous brands and private label offerings produced by CPG, cosmetics and healthcare companies
- We found that all sunscreen brands are **performing well on average** with ratings **over 4 stars** and **positive sentiment scores**. Bioré and Shiseido products lead the pack with Target's private label brand, Up & Up, hot on their heels
 - Up & Up's sunscreen spray **outperformed other name brands' sprays**, winning over hearts of consumers with great *Value Offering*, ideal *Skin Protection & Efficacy*, strong *Superfan Anecdotes*, and nice *Scent & Packaging Convenience*
 - Amazon's private label, Solimo, was reviewed well for "*Skin Protection and Efficacy*" and "*Value Offering*", but it has not gained significant review share against other mass market lotions since its launch in April 2019, suggesting mass market sunscreen consumers are **not extremely price sensitive** and may weigh cheaper prices against their loyalty to brands that they know and trust
- As expected, review volume for sunscreens is **highly seasonal**, with a **3-month summer spike** across June, July and August, and a nadir in November. Interestingly, we discovered off-season bumps in volume in late December, due to holiday travel
- The outset of the **Covid-19 pandemic** had a **significant negative impact** on the sunscreen market, as reviews dropped **8.4% YoY from 2019 to 2020** for the 4-month period from **March to June**
 - As Stay-At-Home Orders were carried out, customers' preferences shifted towards **lower SPF products** at the cost of high SPF (50+) products

Looking at review volume over time, we see clear seasonal spikes in summer and minor resurgences in winter during the holiday season



Using its advanced Natural Language Processing algorithms, Yogi automatically detected 7 unique themes within these reviews

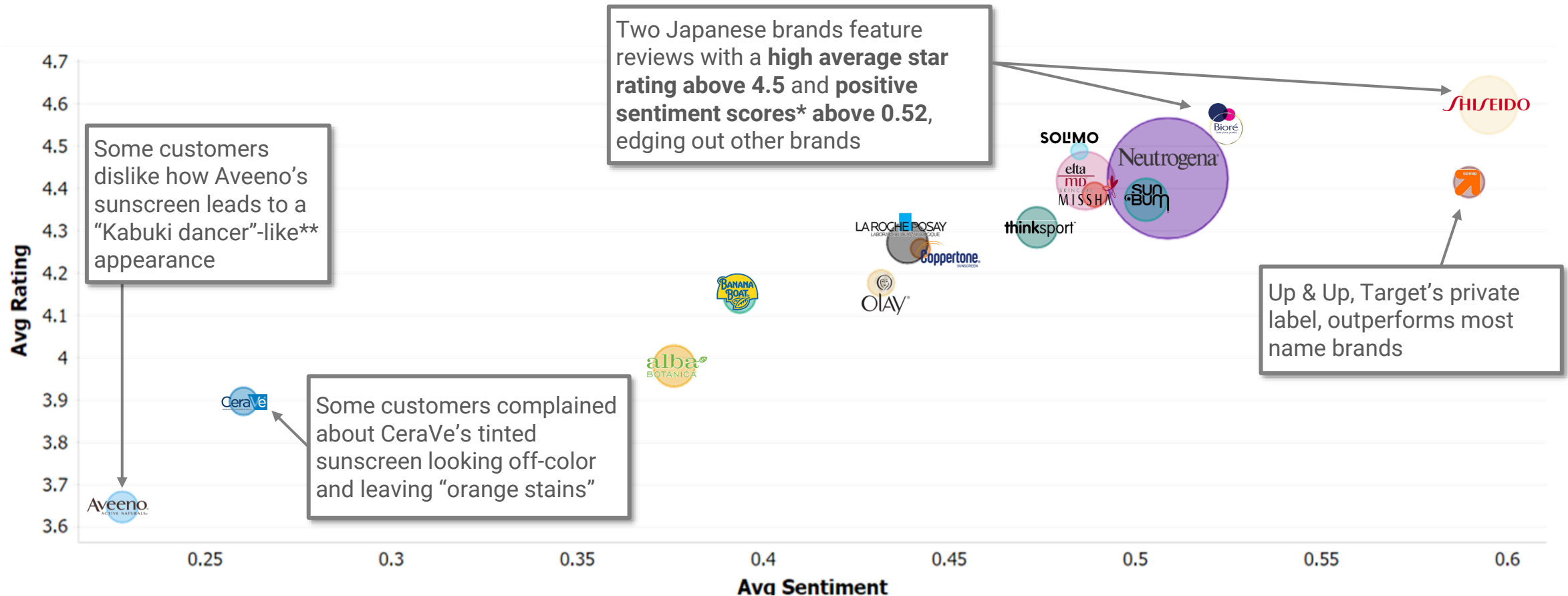
eCommerce Analysis



When looking at ratings and sentiment*, we see that Shiseido and Bioré, two Japanese brands, are leading the pack, while Aveeno and CeraVe are lagging

eCommerce Analysis

Average Rating and Sentiment Performance by Brand (Bubble Size Represents # of Reviews)

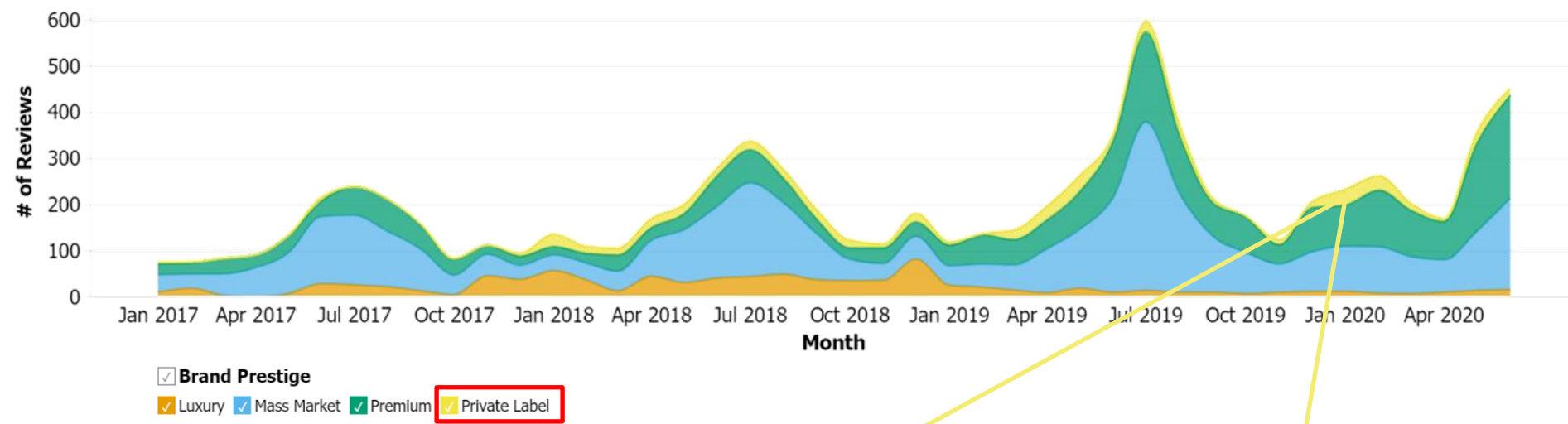


*Yogi's proprietary sentiment analysis algorithms scores overall tone of each review from a range of -1.0 to 1.0 (≥ 0.3 = positive, 0 = neutral, ≤ -0.3 = negative)

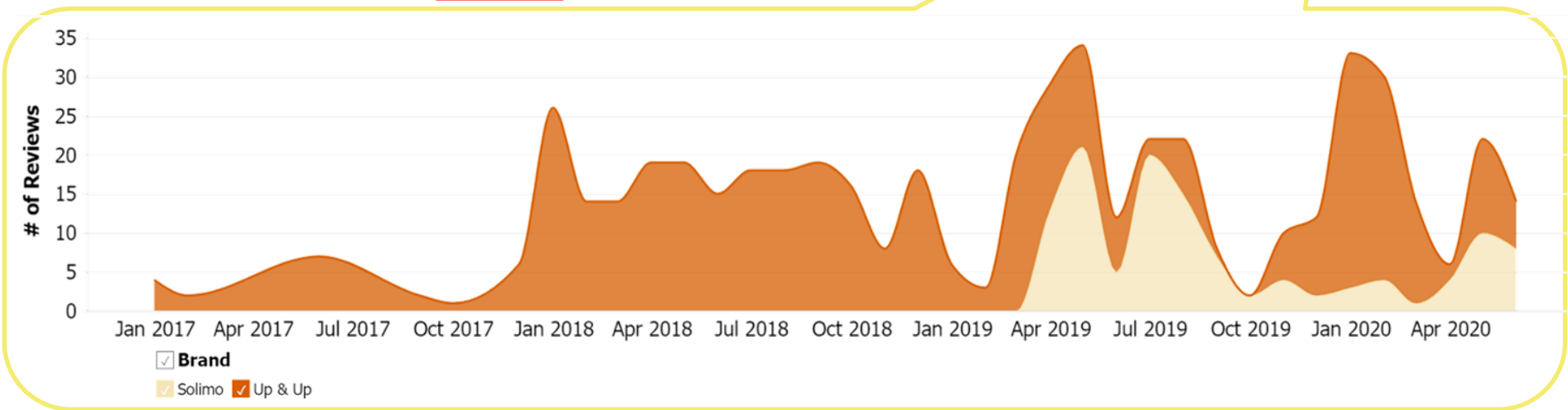
** Selected quote from Marie K

Despite high average sentiment scores, Amazon and Target’s private label sunscreens have *not* gained large review volume share, suggesting consumers have strong brand loyalty

Private Label Analysis



Newly launched in April 2019, Solimo sunscreen has **not accumulated many reviews nor has it grown in review share**, despite Amazon’s advantages in placing their results above competing products



Yogi Callout

Fluctuations in review volume are often correlated with sales fluctuations.

*Yogi’s proprietary sentiment analysis algorithms scores overall tone of each review from a range of -1.0 to 1.0 (≥0.3 = positive, 0 = neutral, ≤-0.3 = negative); Q2 2020 has partial data

Up & Up outperformed competing name brand sunscreen sprays in 4 out of 7 customer conversation themes

Private Label Analysis

Average Sentiment By Theme – Spray Product



Clogged nozzles are major complaint about all spray bottle offerings. Spray products have an **average sentiment of 0.09** in **Skin Application & Sensation**, while lotion and stick products **average 0.18 and 0.34**, correspondingly.

Unlock Competitive Advantage



1. 100% Satisfaction* in Value Offering
"I purchased 6 bottle @ 6.19 at my local target there was a sale ... which brought it down (after giftcards) to \$1.24 per can."
-Aliya S.



2. Loyal Customers
"I have used this for close to 5 years and am very pleased with the quantity that comes in the can, as well as its effectiveness."
-Amanda Q.



3. Nice Smell and Evenly Dispersing Nozzle
"Sprays whether its right side up or upside down. Easily reach the hard to get areas with this spray... Has a pleasant sent and works great."
- Pamela H.



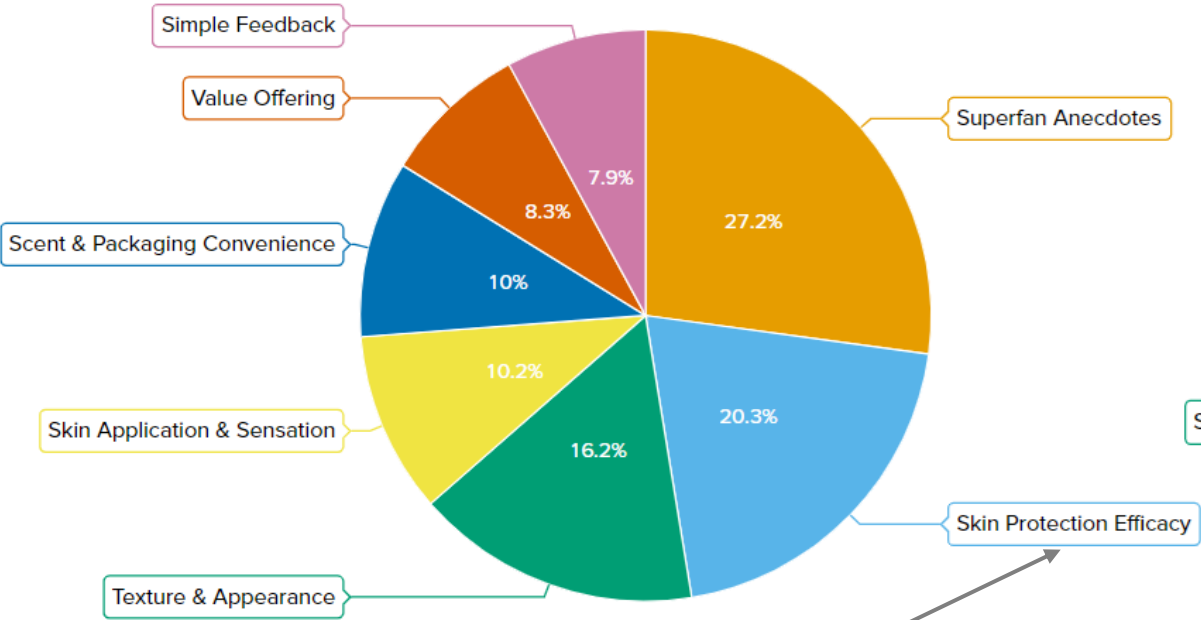
4. Guaranteed Sun Protection
"...This is a great value for hard working sunblock! Keeps the kids and I safe swimming, at the park, or just living our daily life!"
- Tianna G.

*100% of Up & Up reviews in the "Value Offering" theme scored at or above a positive sentiment score of 0.4

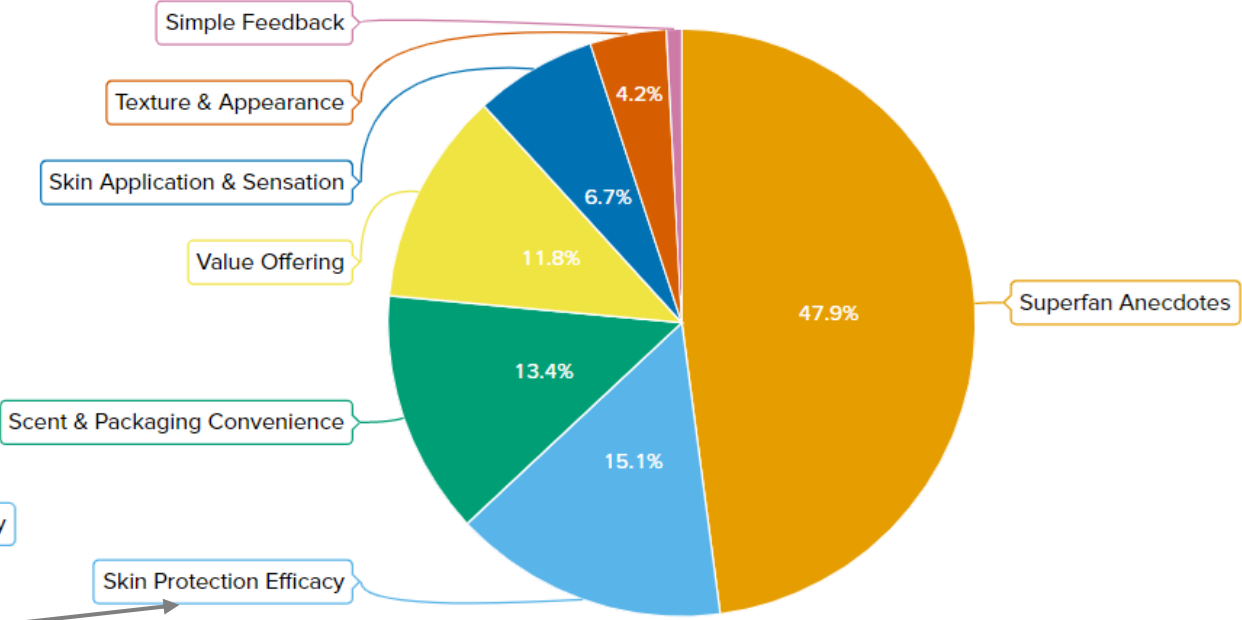
Amazon’s private label Solimo stays competitive in the mass market due to its non-greasy texture, low price, and good protection

Private Label Analysis

Theme Distribution – Mass Market Lotion Product*



Theme Distribution – amazon Brand Only



Solimo beats other 3 products in “Skin Protection and Efficacy” with the highest sentiment score of 0.38. Some Thinksport and Aveeno customers complained about being “burned to crisp”, while others break out after using Neutrogena

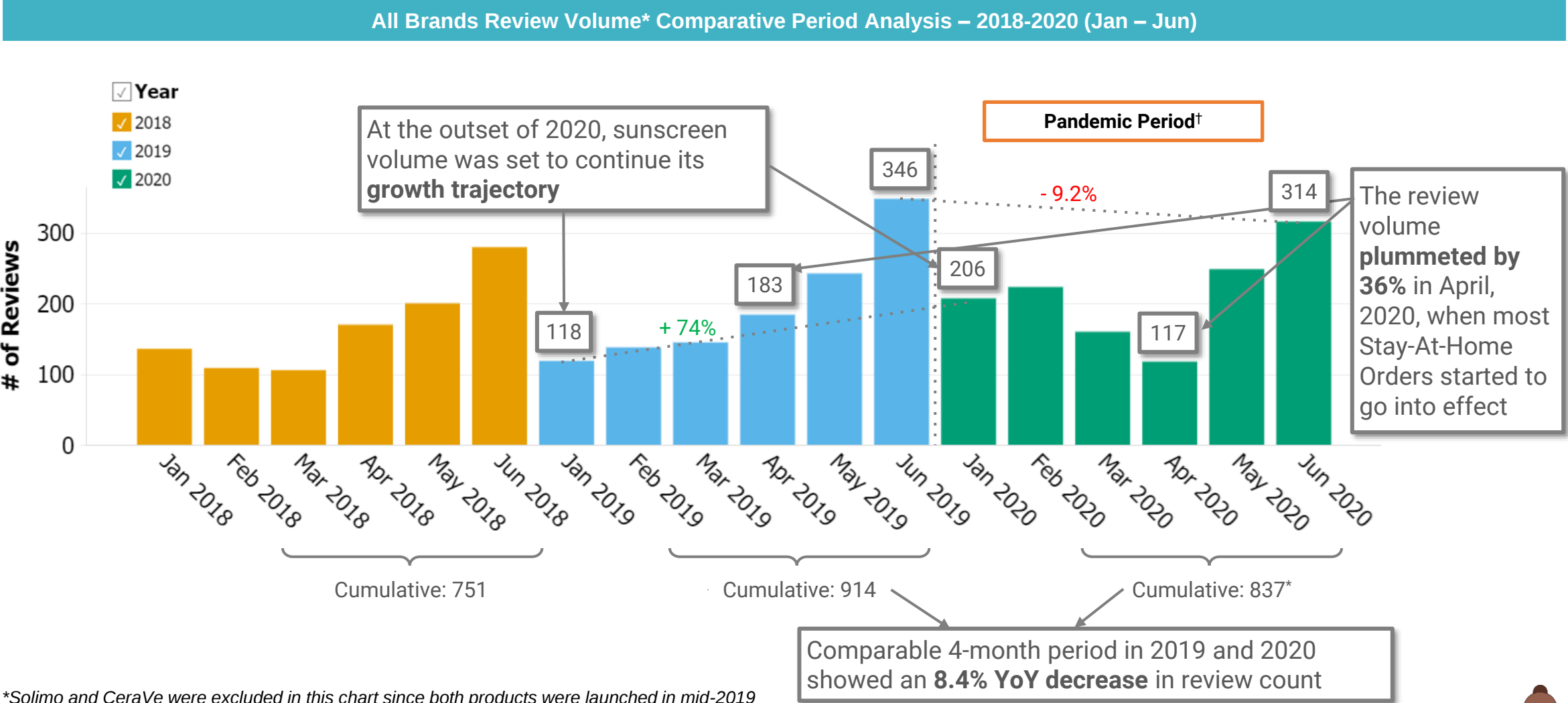
“... We have been using this all summer long for my daughter's outdoor swim lessons. I tend to burn easy and haven't had any issues with sunburn all summer. ... I enjoy the nice clean scent and it doesn't leave a greasy residue like other brands have. I will continue to buy this item.” - Kindle Customer



*Mass Market lotion products include: Aveeno, Neutrogena and Thinksport

COVID-19's arrival had a dramatic and swift impact on the sunscreen market as fewer consumers ventured outside. As it got warmer, volume picked up but not to 2019 levels

Covid-19 Analysis

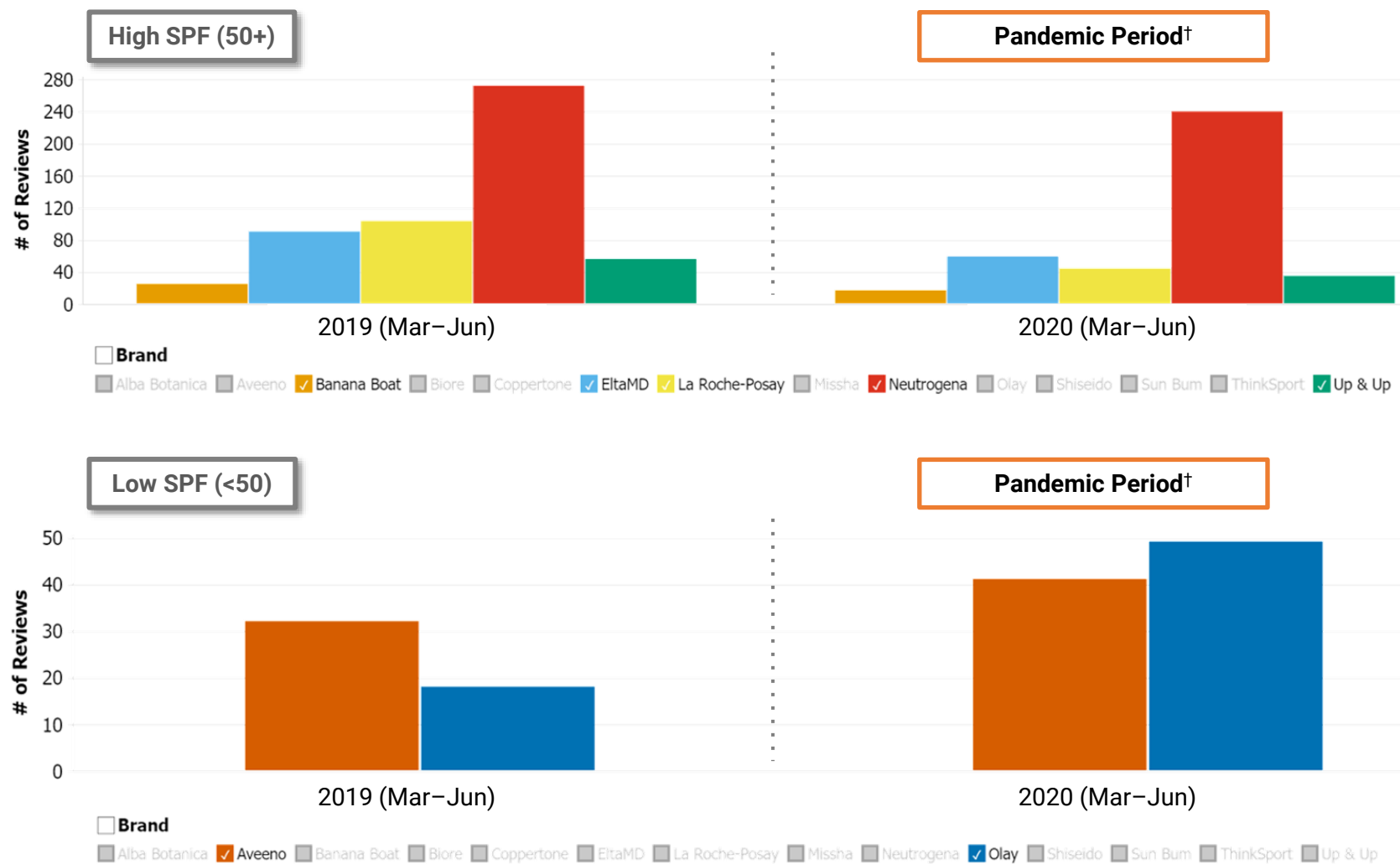


*Solimo and CeraVe were excluded in this chart since both products were launched in mid-2019

† On Feb 29th, the first reported coronavirus death was reported in the US. By March 26th, the US led the world in confirmed cases.

Digging deeper, we see that lower SPF products experienced review growth at the expense of most SPF 50+ products during the pandemic...

Covid-19 Analysis



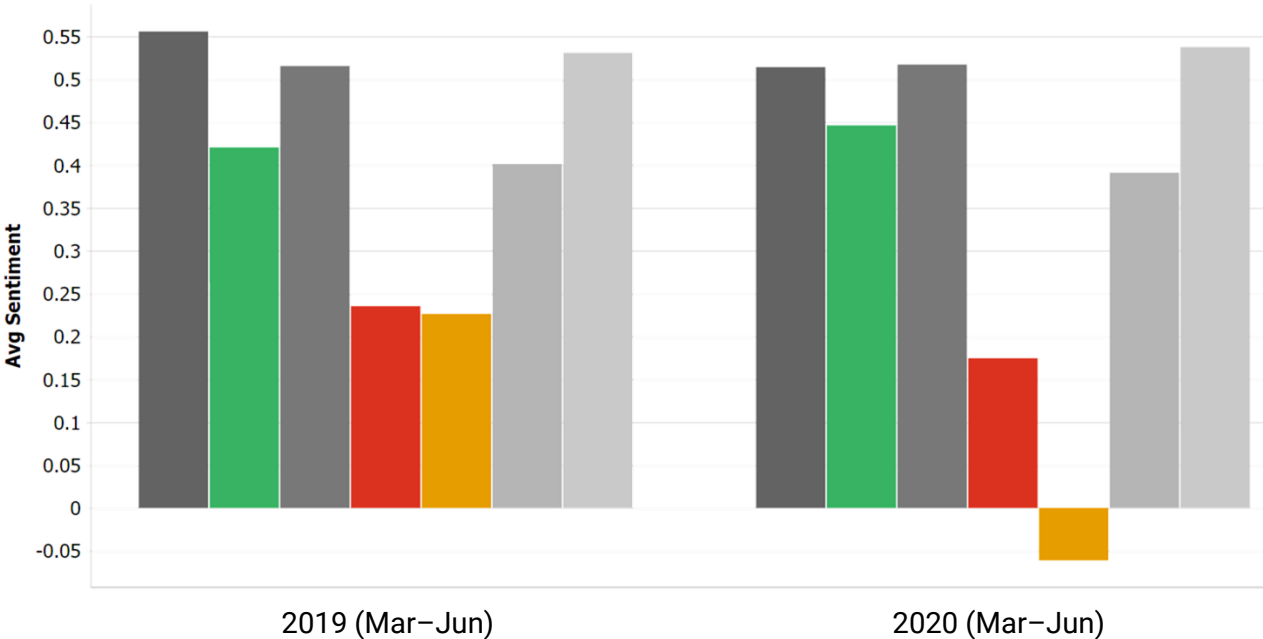
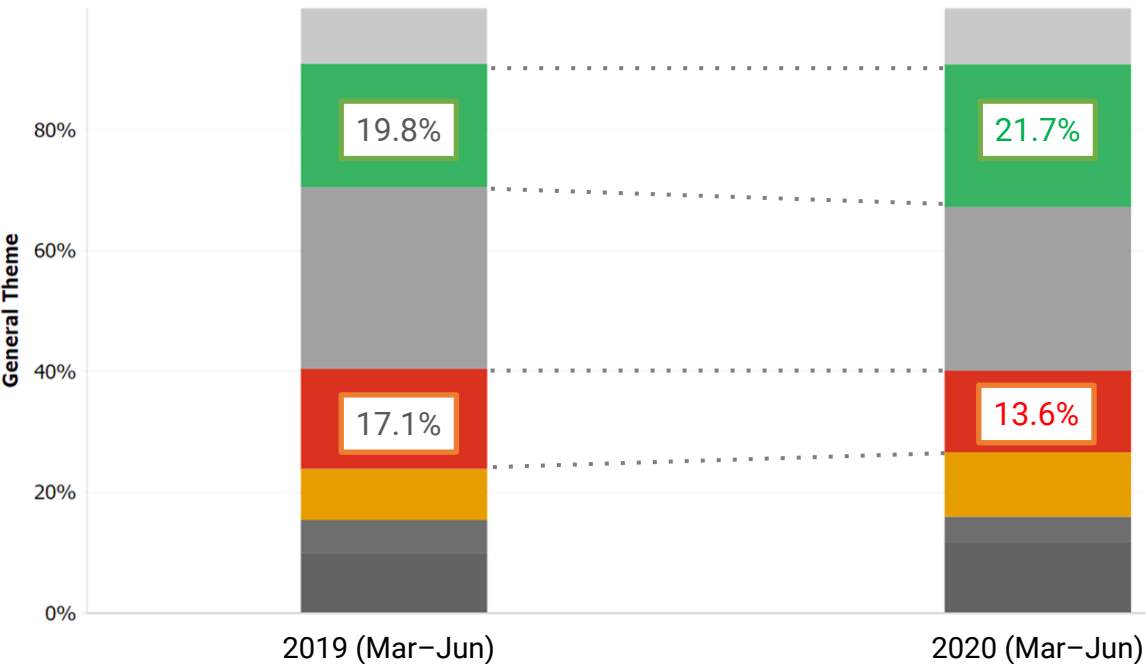
Pre and During Covid-19 Relative Periods				
Brand	SPF	Mar – Jun 2019	Mar – Jun 2020	Δ
 Olay	40	18	39	117%
 Aveeno	30	32	41	28%
 Neutrogena	70+	271	239	-12%
 Banana Boat	100	25	17	-32%
 eltaMD	50	90	59	-34%
 up & up	50	56	35	-38%
 LA ROCHE-POSAY	60	103	44	-57%

† On Feb 29th, the first reported coronavirus death was reported in the US. By March 26th, the US led the world in confirmed cases.

...the drop in high SPF product was caused by shifting consumers' needs from Protection Efficacy to Texture and Sensation during the pandemic period†

After Stay-At-Home Orders were instituted, consumers cared **more** about **Texture & Appearance**, but **less** about **Protection Efficacy**

Though most of other themes remain at the same sentiment score, reviews about **Skin Application & Sensation** fell off a cliff – from **0.3** in 2019 down to **-0.6** in 2020



General Theme

✓ Scent & Packaging Convenience ✓ Skin Application & Sensation ✓ Skin Protection Efficacy ✓ Superfan Anecdotes ✓ Texture & Appearance ✓ Value Offering

† On Feb 29th, the first reported coronavirus death was reported in the US. By March 26th, the US led the world in confirmed cases.



Want to see the full analysis?

[Reach out for a demo today.](#)



Yogi

Understand your customers, **like never before**

Yogi is a cloud-based software company headquartered in New York. It provides feedback analytics solutions and business intelligence dashboards to customer-focused businesses.

Our Mission

Yogi aims to usher in a new age of excellent customer experience by better integrating the downstream stakeholders of products to the upstream developers, marketers and executives through AI-assisted data-driven decision making.