

Wiping Away The Competition: Clorox Disinfectant Wipes Dominate the eCommerce Channel

A brief analysis of the Disinfectant Wipes market, powered by Yogi

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

YOGI WORKS IN THREE PHASES

Centralize

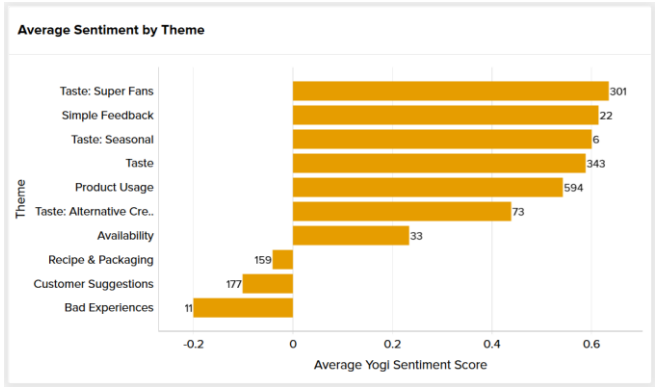
qualtrics, zendesk, SurveyMonkey, salesforce, Walmart.com, INTERCOM, bazaarvoice, influenster, CSV

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 5,107 product reviews for 9 popular disinfectant wipes products from 5 brands

Products Analyzed

CLOROX



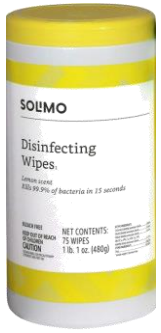
Lysol



seventh GENERATION



SOLIMO



amazon

Great Value



Walmart
Save money. Live better.

Research Questions

ECOMMERCE

What can we learn about the eCommerce market for disinfectant wipes? Which brands are doing better than others and why?

CORONAVIRUS

What changes has COVID-19 caused in the disinfectant wipes market? How has it impacted consumer preferences and shopping habits?

LYSOL BRAND ANALYSIS

How is Lysol performing compared to competitors? What are Lysol's competitive advantages and weaknesses?

Yogi is used by CPG companies for broad market research as well as more targeted competitive analysis

Summary



- The U.S. disinfectant wipes market is largely dominated by two recognizable name brands: Clorox and Lysol. A distant third brand, Seventh Generation, is strongly associated with “chemical-free” products
- Most brand’s products average **over 4 out of 5 stars** and have **positive sentiment scores* over 0.47**
  - Seventh Generation is the one exception with an average **3.6 star rating** and a **neutral sentiment score** on average
  - **Clorox Scentiva Disinfecting Wipes** and **Lysol Dual Action Wipes With Scrubbing Texture** outperformed other products with the highest average sentiment score and lowest standard deviation of sentiment score, suggesting consistently good customer experiences
  - **Solimo**, Amazon private label offering, is a **top-rated performer** despite having only been launched in November 2018
- The disinfectant wipes market has been hugely impacted by COVID-19. Review volume for disinfectant wipes grew at **94% CAGR** from **Q1 2018** to **Q4 2019**, but the growth rate **surged to 225%** during the pandemic period
  - “Chemical-free” wipes showed modest traction before ***and*** during the pandemic suggesting that this product category is saturated and has little room for further growth

**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)*

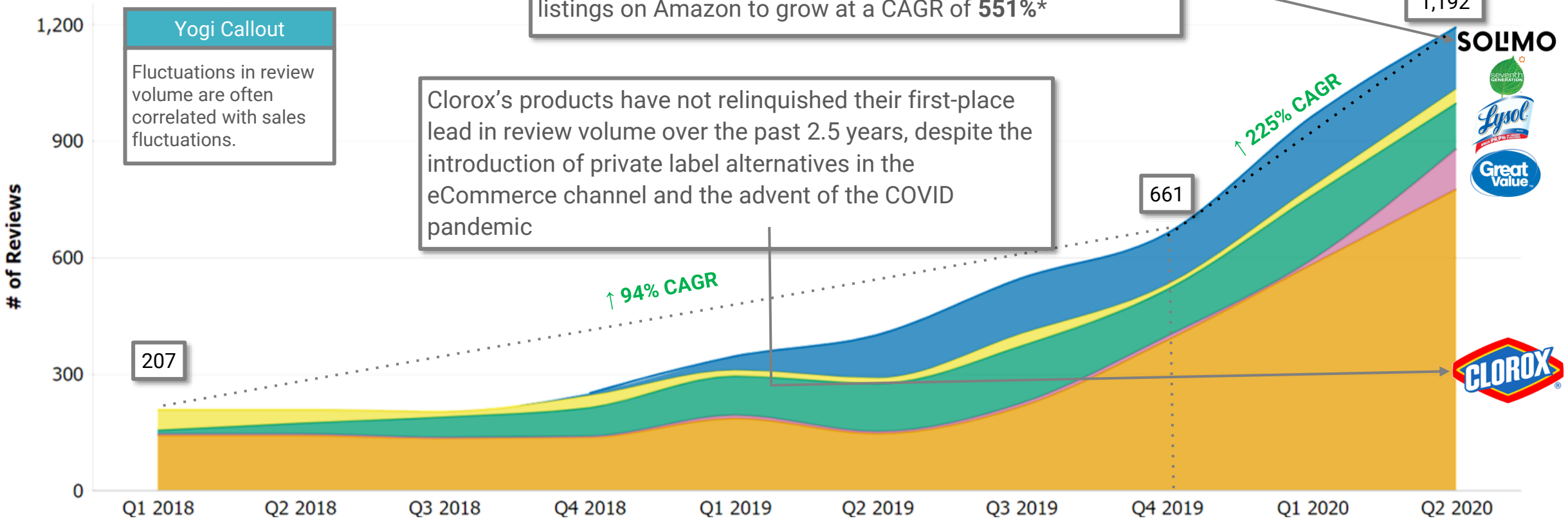
Looking at review volume over time, we see remarkable growth of **94%** over the 7 quarters prior to Q4 2019, which skyrocketed to **225%** during the first half of 2020

Yogi Callout

Fluctuations in review volume are often correlated with sales fluctuations.

Launched in November 2018, Amazon's private label brand, Solimo, took advantage of its value pricing and prominent listings on Amazon to grow at a CAGR of **551%***

Clorox's products have not relinquished their first-place lead in review volume over the past 2.5 years, despite the introduction of private label alternatives in the eCommerce channel and the advent of the COVID pandemic



*2018 Q3 to 2020 Q2

Using its advanced Natural Language Processing algorithms, Yogi automatically detected 10 unique themes within these reviews



"I buy these ***for my daughter's elementary classroom.*** *Great value and keep the kids from getting germier than they already are.* ***The teacher likes them.****"*

- Missie



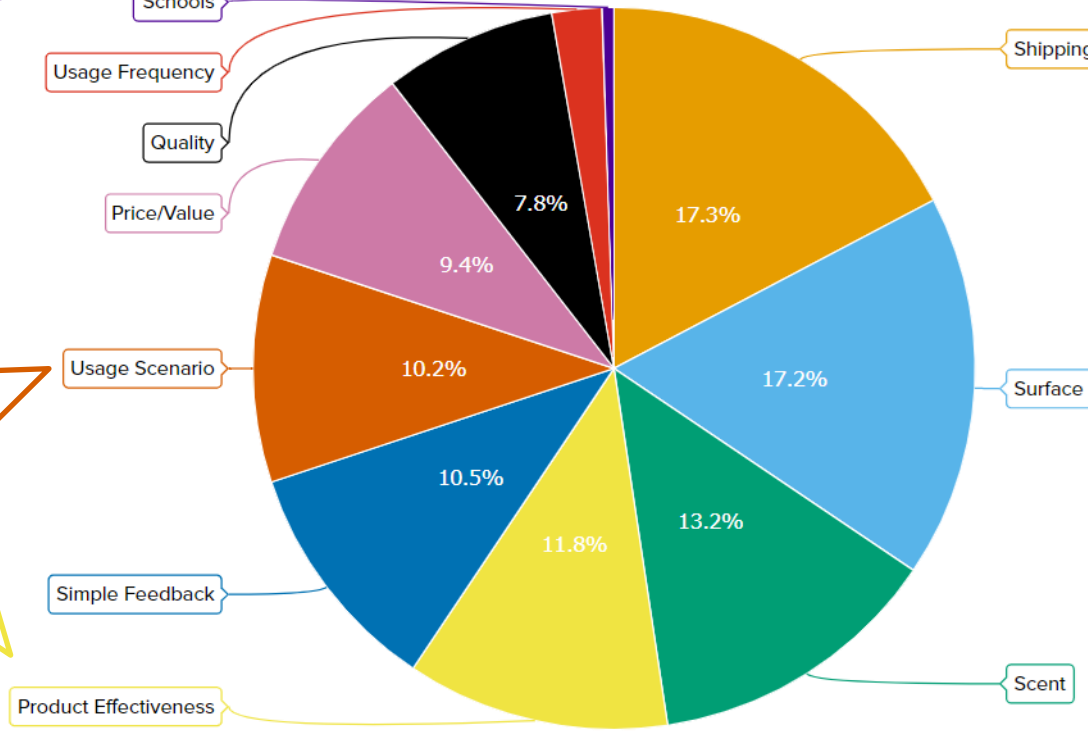
"I like these wipes because they are safe to use around children. ***We use them for tables and toys****... Very pleased."*

- Joanie A.



" I love Clorox but these were dry. I had to wet it a little in water to use. And yes it a bit pricey. The only good thing is the ***scrubbing side is useful****."*

- Amina



"...I also received it ***earlier than expected****.. However, it is slightly disappointing as the* ***packaging was not the type that I get previously****..."*

- Toh



"I got these at the beginning of pandemic. I left one bottle in the office to ***wipe on the door knobs*** *or where ever I needed..."*

- Amazon Customer



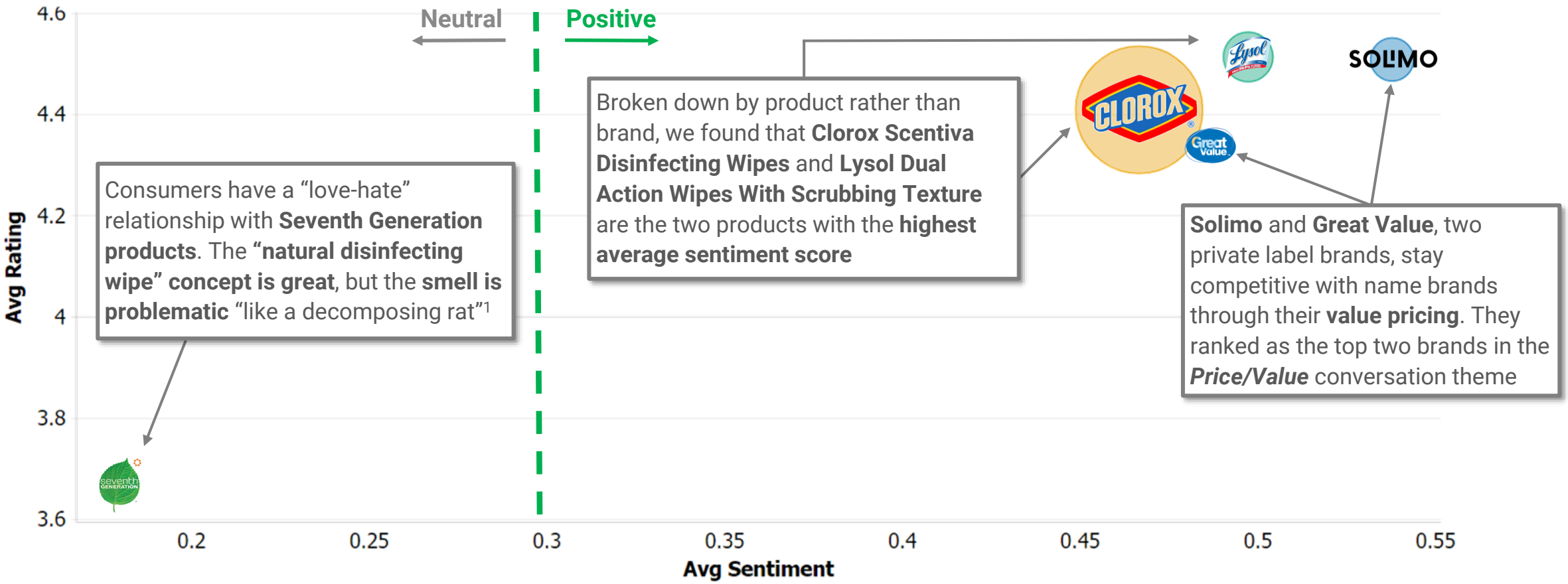
*"Smells great..****coconut smell****..I feel like I'm on a tropical beach lol and it disinfects plus durable enough to scrub some too if need be! Win win!!"*

- Stephanie



When looking at rating and sentiment*, we see that most brands are generally performing well except for Seventh Generation, which lags behind

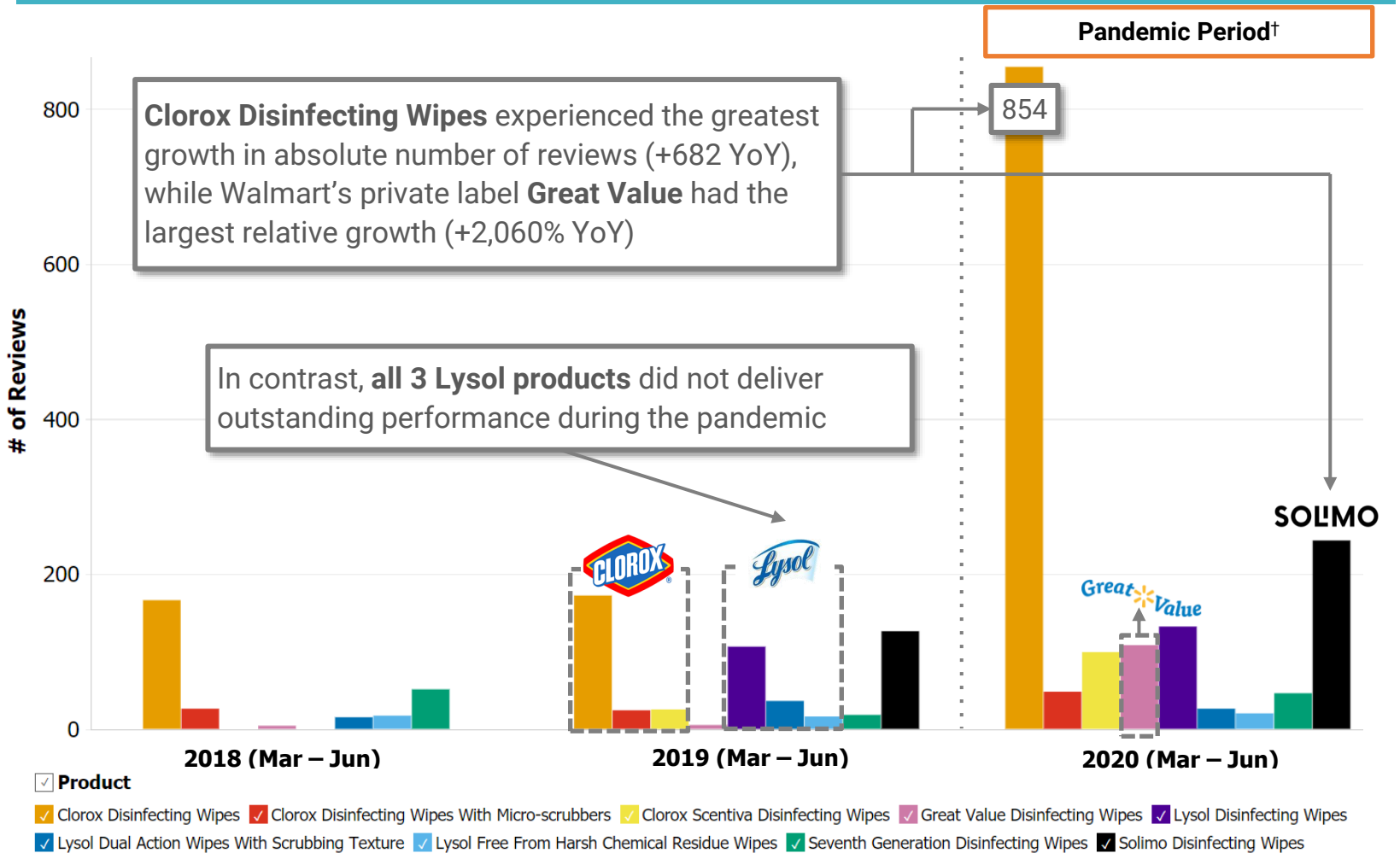
Average Rating and Sentiment Performance by Brand (Bubble Size Represents # of Reviews)



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[1]Selected Quote from Irina R.

The massive gains in disinfectant wipe review volume during the pandemic have not been shared equally

All Brands Review Volume Comparative Period Analysis – 2018-2020 (Mar – Jun)



Pre and During Covid-19 Relative Periods

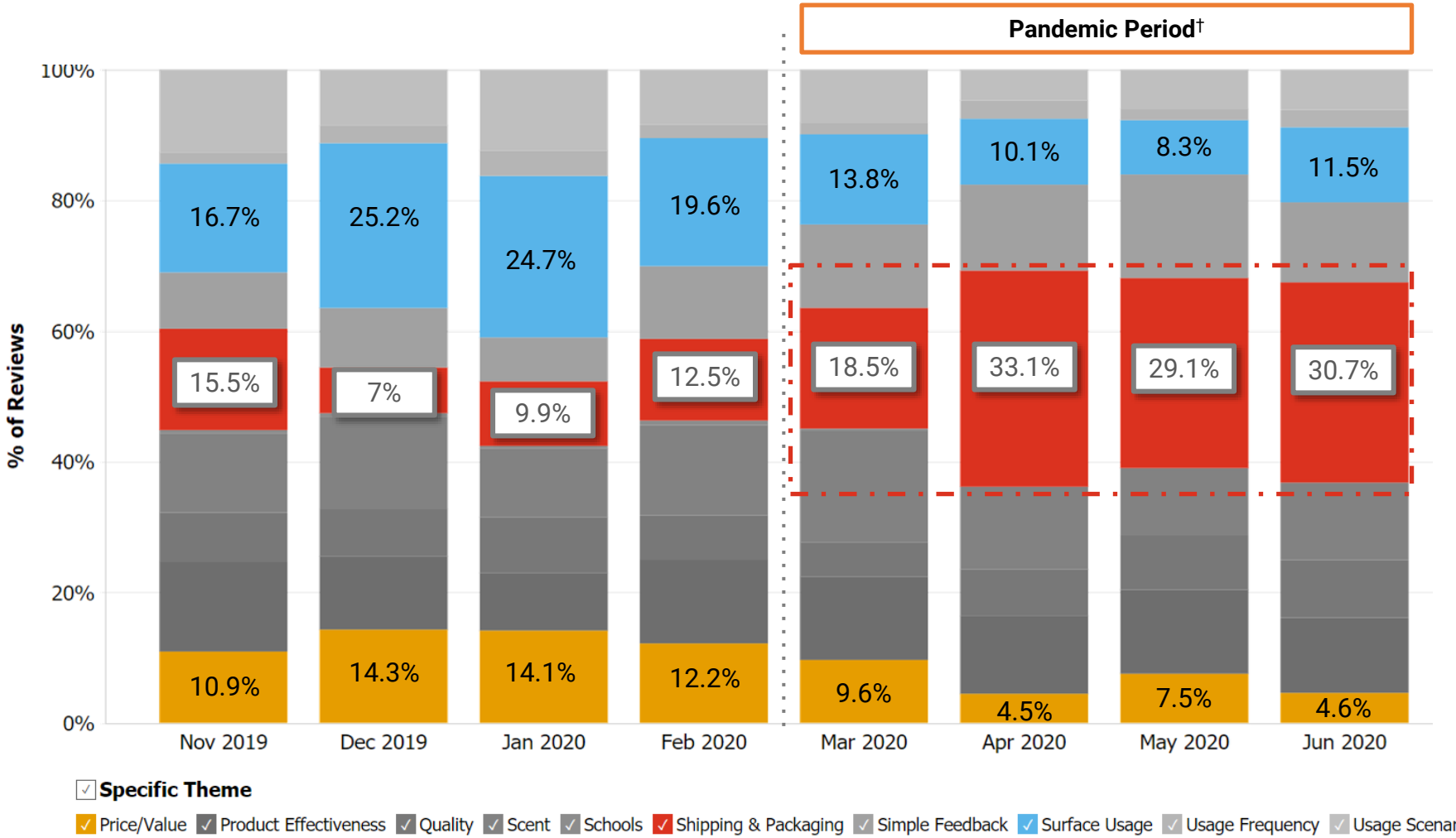
Product	Mar – Jun 2019	Mar – Jun 2020	Δ
	5	108	*2,060%*
	172	854	*397%*
	126	243	*93%*
	106	132	*25%*

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

Yogi

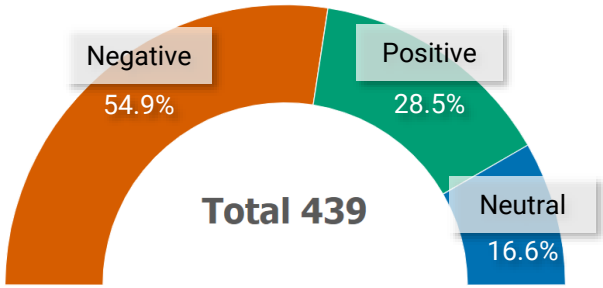
Customer priorities have shifted dramatically during the pandemic: ***Shipping & Packaging*** experience is the front and center concern while ***Price/Value*** has been de-emphasized

Conversation Theme Distribution Over Time (Nov 2019 – Jun 2020)



Sentiment Distribution

This significant change in conversation theme distribution was primarily driven by negative experiences. In fact, **54.9%** of consumers were **not satisfied with *Shipping & Packaging*** during the pandemic period



Sentiment Distribution of *Shipping & Packaging* (Mar 2020 – Jun 2020)

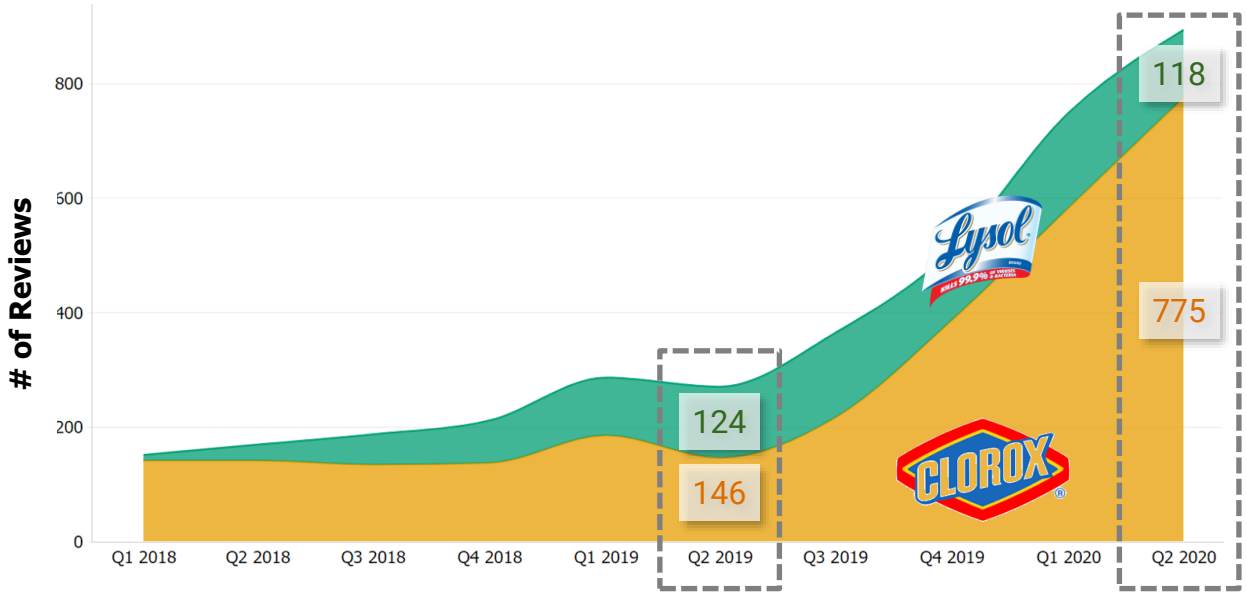
"Lid of items doesn't fit. They are delivered open and leak. Box is also wet." - Star

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Lysol is struggling to match Clorox's popularity on Amazon; it could leverage its historical strength in the education market gain some competitive ground

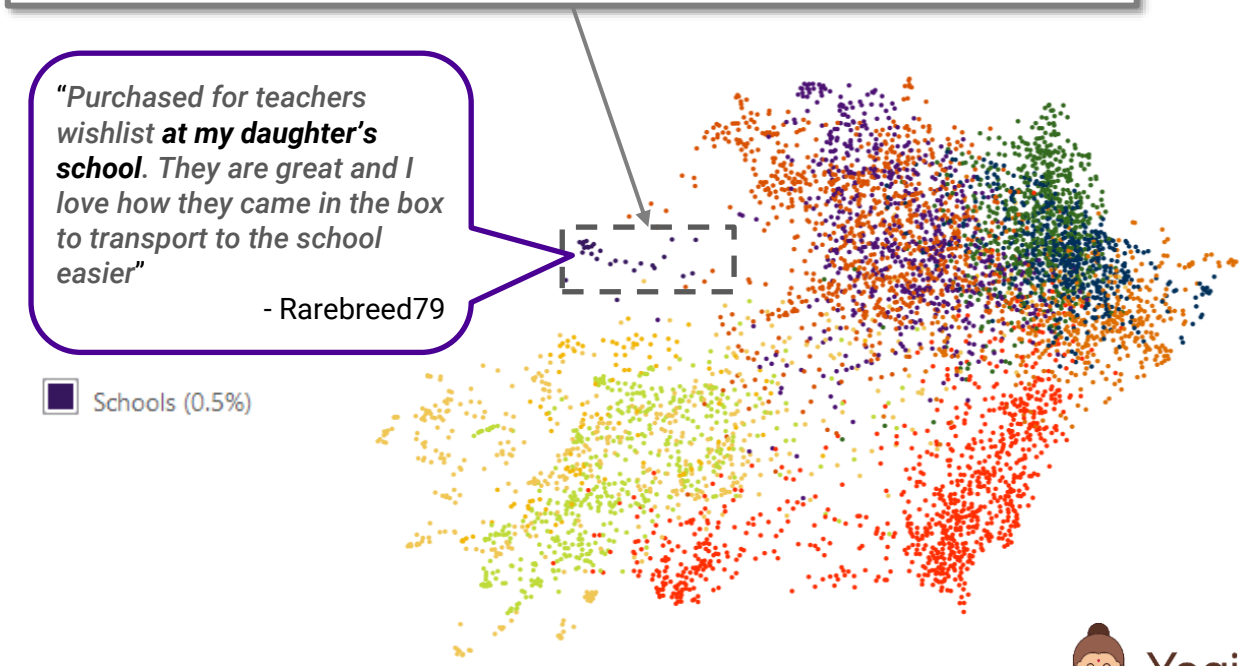
of Reviews Over Time – Lysol vs. Clorox

During **Q2 2019**, Lysol had grown to be nearly at par with Clorox's eCommerce presence in terms of reviews. However, their products were unable to maintain the competitive pressure and a year later, during the midst of the COVID-19 pandemic, Clorox had widened their volume lead over Lysol by more than sixfold



Yogi Network View Color Coded by Conversation Theme

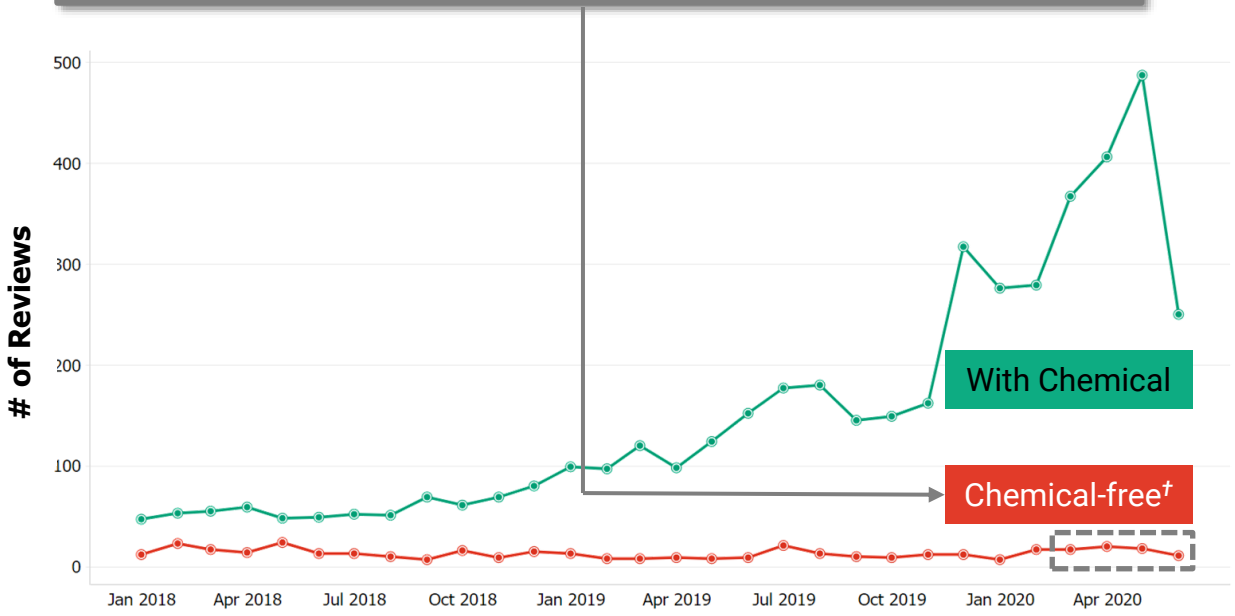
Using Yogi's proprietary **Network View**, we spotted a distinct cluster of customers talking about **buying disinfectant wipes specifically for teachers and classrooms**. Although plans to reopen schools are still in flux across the country, another **"back-to-school" marketing campaign with promotions for education stakeholders** could be a way to stand out and attract new customers that persist post-pandemic



“Chemical-free” wipes showed modest traction before ***and*** during the pandemic; a strong preference for disinfecting efficacy make it more important than ever for Lysol to avoid labeling missteps

of Reviews Over Time

Surprisingly, **“chemical-free” product reviews remained flat** from 2018 to the present. Even the advent of a global pandemic that drove historic demand for cleaning products failed to boost customer interest, suggesting that the “chemical-free” disinfecting wipes market has matured and may be in decline.



Reactions Towards Missing “Kills 99.99%” Labels

1. Misleading Labeling

*“**Useless!** Thought these were antibacterial wipes. **Was mislead and they were price gouged!!** Shame on you!!!!”*

- Stacey A C.

2. Fake Products

*“**These are fake,** I have the ones I bought from target the red strip on the front says (kills 99.99% germs) this 3 pack Is not real the red strip on front of label is blank. Don’t waste your money.“*

- Rebecca L.

3. Concerns about Product Efficacy

*“…I asked a question a month ago that where the package was now where **it used to say it killed 99.9% of bacteria**… But … I've found the exact product with the package says it kills 99.9% of bacteria. So, I am asking the manufacturer again, "**Does this product kill bacteria**?“...”*

- Mustlovecats

4. Looking for New Substitute

*“…It is not for sanitizing , as I was purchasing the items bellow were described as 99 per cent germ killer and assumed that it was this items description. It is basically wet wipes with no harsh chemicals. **Could of just bought baby wipes for a better price**”* *- G. F. G.*

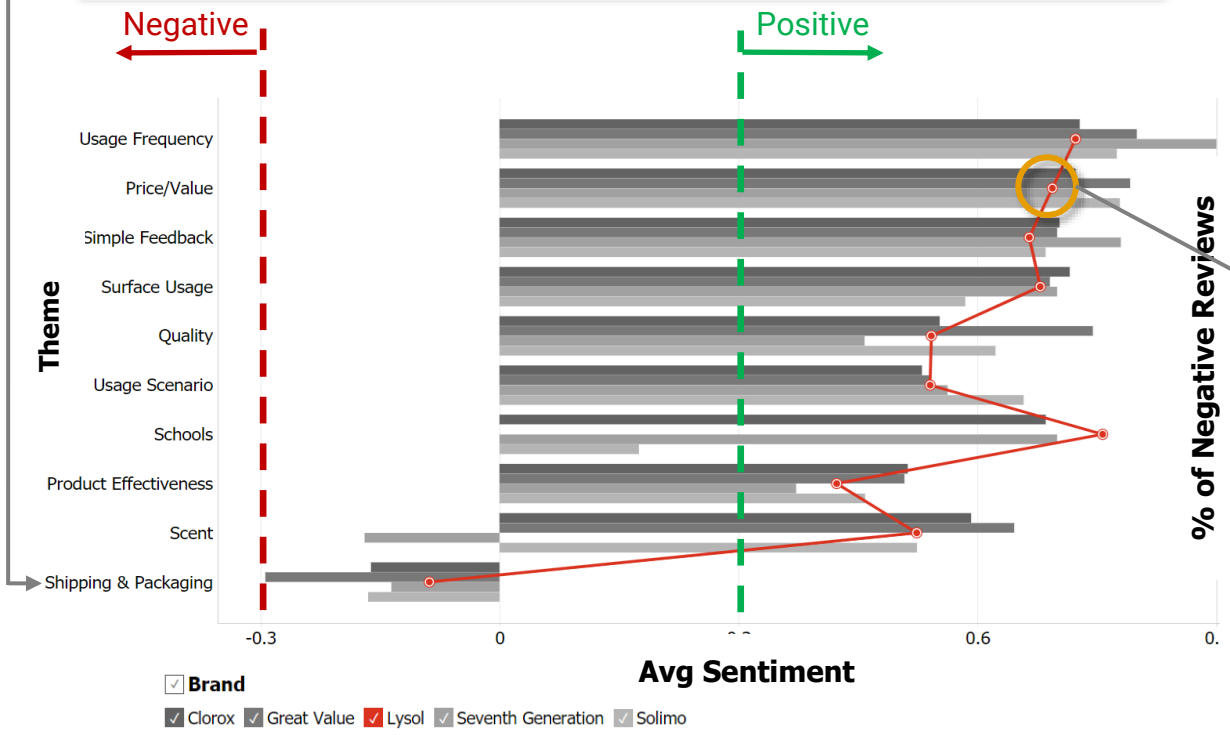
†Two “chemical-free” products are included in the dataset: Lysol Free From Harsh Chemical Residue Wipes and Seventh Generation Disinfecting Wipes

Yogi

Shipping & Packaging is the common problem that troubles all brands. Aside from that, Lysol is also facing with the *Price/Value* challenge from private label brands

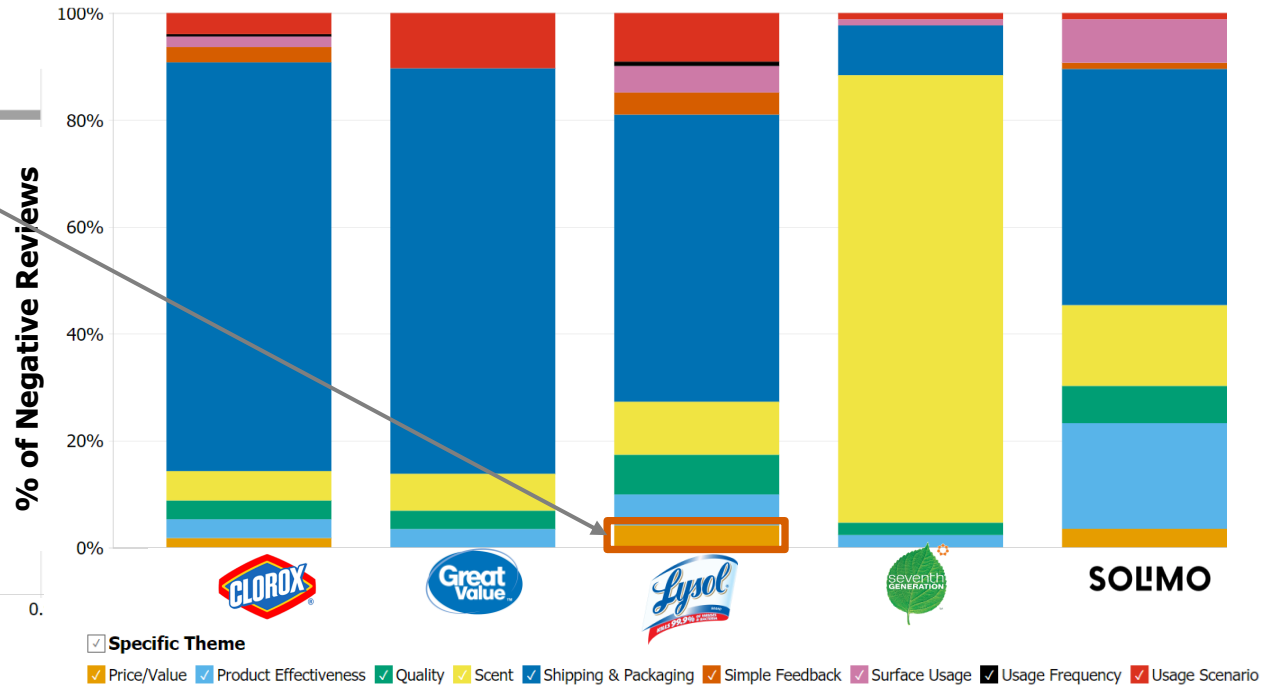
Average Sentiment by Theme*

Shipping & Packaging stood out as the customer conversation theme with the most negative language. **43.8%** of all Lysol's negative reviews mentioned at least one of the following keywords: "leak", "dry", "open", "damage", "crush", "broke" , "dent"



Negative Feedback Only - Distribution by Theme and Brand

In contrast with Lysol, 100% of the ***Price/Value*** reviews of **Great Value** are positive. As private labels continue to raise the bar on value offered, how will name brands like Lysol stand out?



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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.