

The Clash of Cultures: Probiotic Brands Compete for Dominance on the eCommerce Stage

A brief analysis of the Probiotic Supplements 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

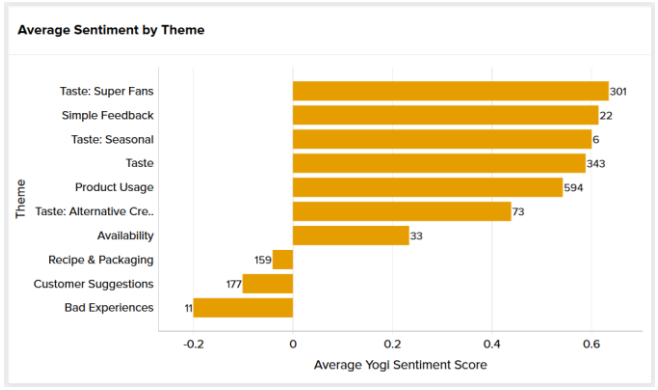
Centralize

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 12,400 Amazon reviews for 13 popular probiotic supplement brands across 12 parent companies

Products Analyzed



Research Questions

ECOMMERCE

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

AMAZON BRANDS

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

CORONAVIRUS

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

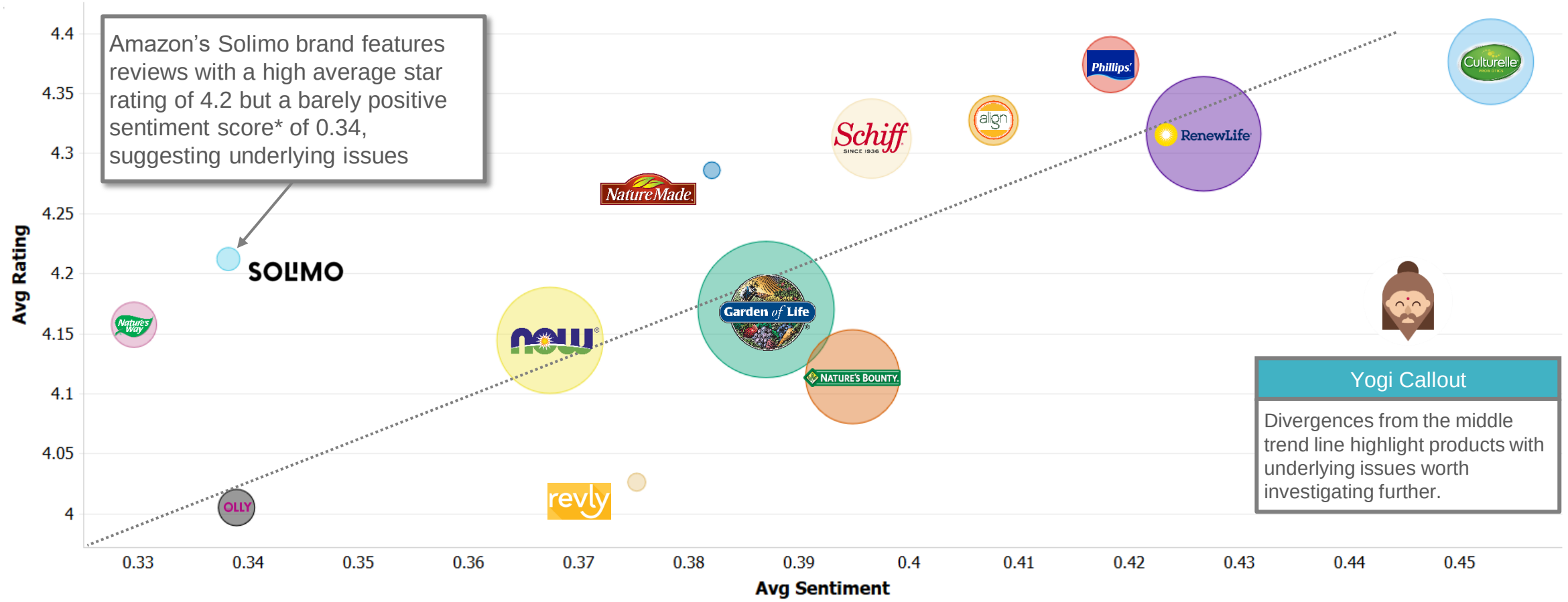
Yogi's use cases range from broad market research to more targeted competitive analysis. Below are summary findings from the probiotics market



- The probiotic supplement market is **fragmented** with many well-rated and reviewed branded and private label options for customers
- We found that all probiotic brands are **performing well on average** with ratings **over 4 stars** and **positive sentiment**. Culturelle, RenewLife and Phillips' products lead the pack with Olly and Amazon's private label brands, Revly and Solimo, bringing up the rear
    - Both of Amazon's private label offerings are eschewed by consumers with more *Severe Digestive Issues*, suggesting they are not *as* trusted by consumers with conditions like IBS compared to other brands
- Overall review volume for probiotic supplements was **flat most of 2019**, with two spikes in January and July. In contrast, the **4-month pandemic period of Feb – May 2020**, experienced a **43% increase** in reviews vs the comparable period in 2019.
    - This growth in overall review volume has *not* favorably impacted the two of Amazon brands, Revly and Solimo. In fact, their Q1 2020 YoY growth was **8%** vs a **whopping 69% increase for all brands** during the same period
- The only conversation theme that **drove negative reviews for all brands** was *Packaging and Labeling*, driven by issues such as problematic packaging materials, refrigeration requirements, faulty shipping and expiration labeling

When looking at rating and sentiment*, we see that premium brands are generally performing well while Amazon brands, Revly and Solimo, are lagging

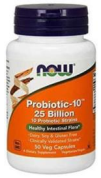
Average Rating and Sentiment Performance by Brand (Bubble Size Represents # of Reviews)



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)

Yogi

Using its advanced Natural Language Processing algorithms, Yogi automatically detected 8 unique themes within these reviews



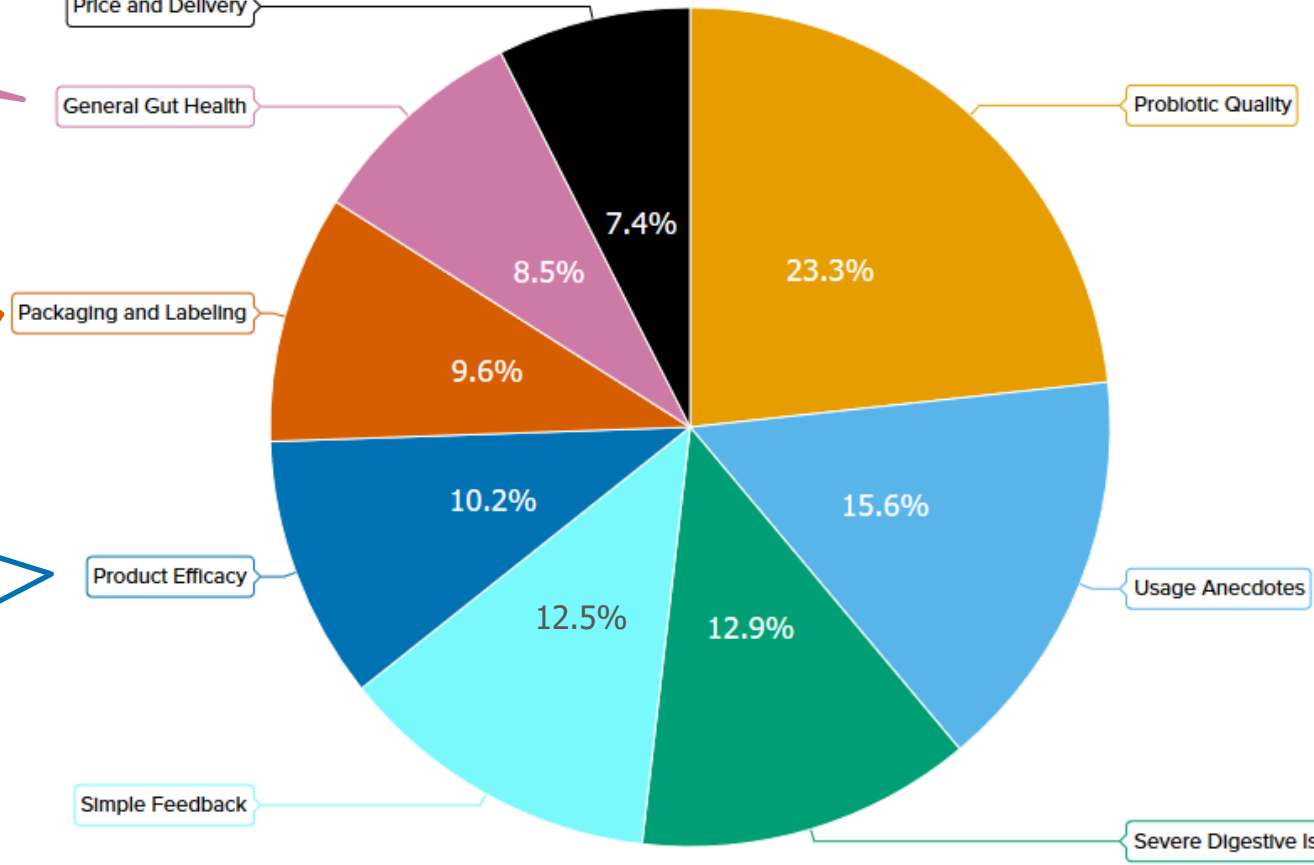
"Worked really well, helps you to digest your food better"
-EJ



"…They are great pills but it is never 30 in the bottle and amazon shouldn't accept this!."
-jynne rob



"Well worth the purchase I have noticed this product works great for me and I highly recommend it."
-Amazon Customer



"I have bought many brands of probiotics to find the right one, and this is it. Comparable in cost and CFU count to others of it's type, this does the job great…"
-M.D.



"This product left me feeling extremely wired and unable to fall asleep. I have never had insomnia in my entire life until I started taking this probiotic…"
-Ari



"No more nausea! I really recommend this product to anyone who has problems with nausea, indigestion, gas pains and bloating."
-DeeDee

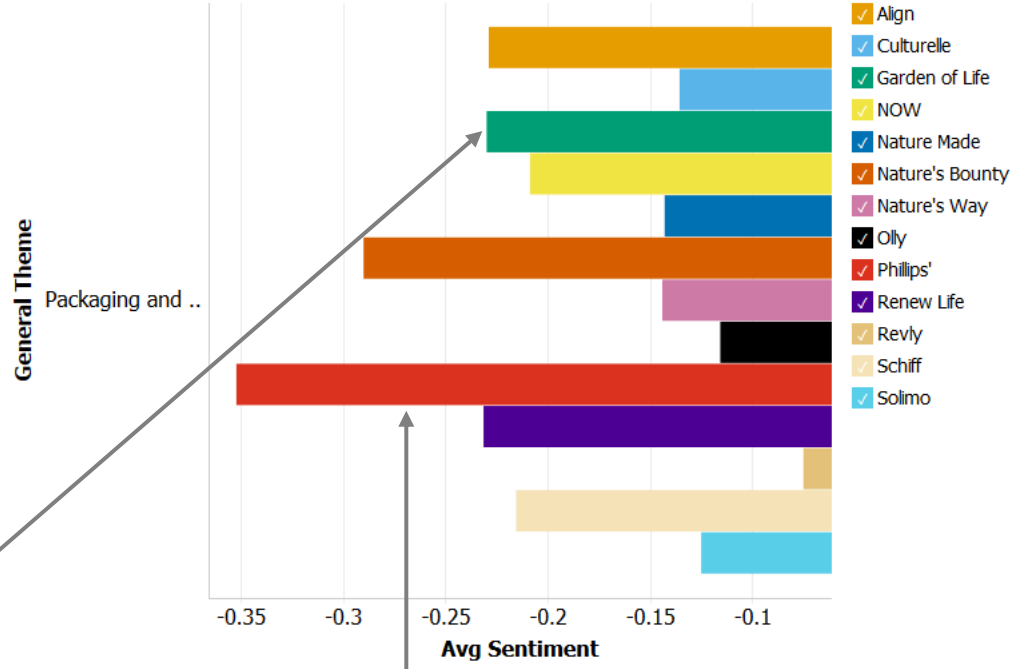


Layering on sentiment score to the themes, we find that *Packaging and Labeling* is driving poor reviews for all brands

Average Sentiment By Theme



Brand Sentiment For *Packaging And Labeling* Theme Only



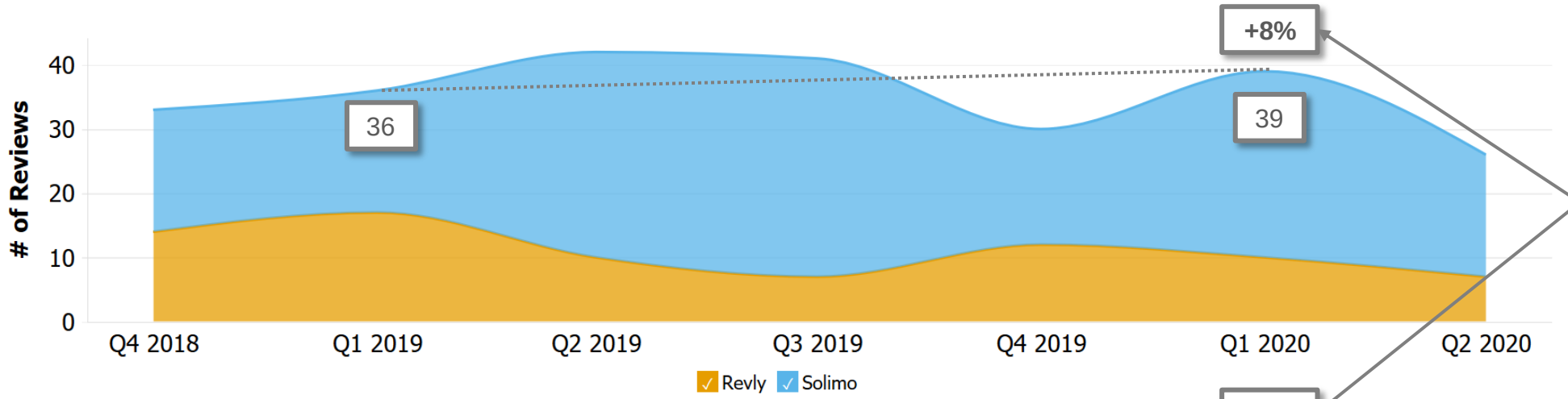
Over 35%* of all **Garden of Life** *Packaging and Labeling* reviews complain about a **toxic chemical smell** coming from the #7 plastic bottles (potential source of BPA)

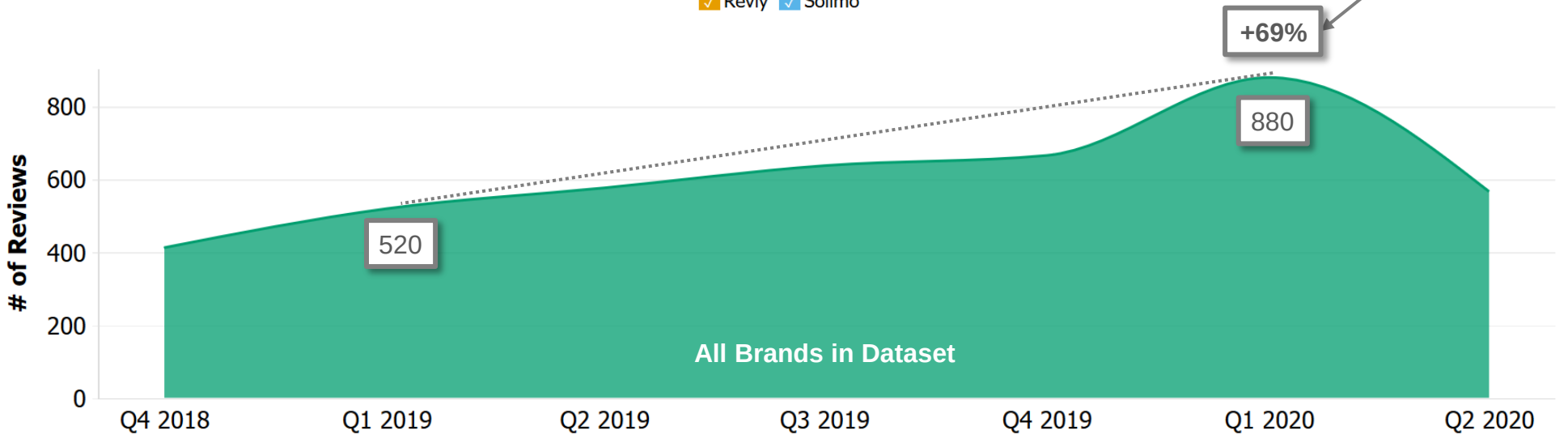
Most of **Phillips'** poor reviews were due to **mismatched expectations of the format** of the packaging – for example, receiving "60 count bottle" as 4 boxes of 15 blister-packed pills, which were difficult for some consumers to open

**97 of 275 reviews mentioned keywords such as "chemical" , "smell", "odor" and "toxic"*

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Review volume and average sentiment score for Amazon's private label probiotic offerings have *not* grown significantly since their launch last year





From **Q1 2019** to **Q1 2020**, total quarterly reviews posted for both Amazon brands only increased by **8%** vs the whopping **69%** increase in reviews for all products in the dataset.

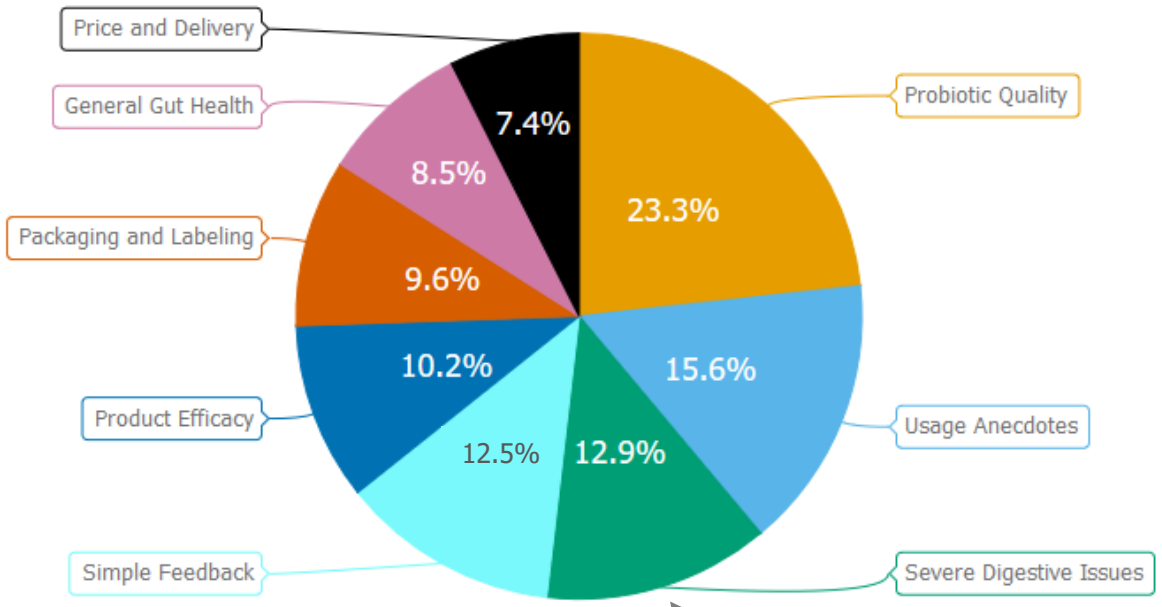
Yogi Callout

Fluctuations in review volume are often correlated with sales fluctuations.

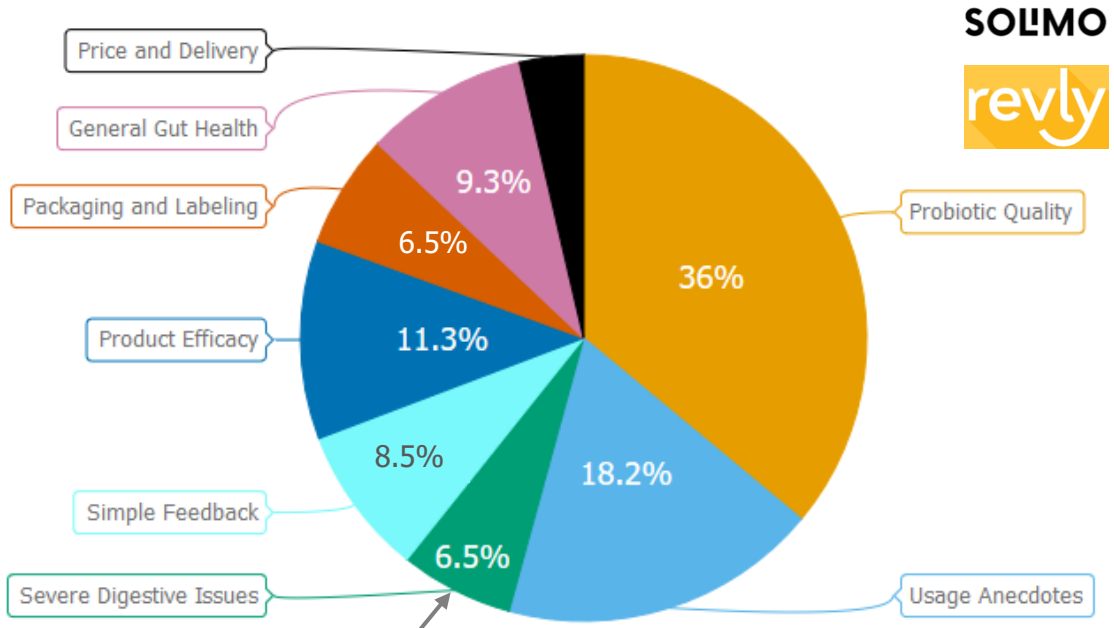
**Yogi's proprietary sentiment analysis algorithms scores overall tone of each review from a range of -1.0 to 1.0 (≥0.3 = positive, 0 = neutral, ≤-0.3 = negative); Q2 2020 has partial data*

Both of Amazon's private label offering are eschewed by consumers with more severe digestive issues

Distribution of Themes – All Brands



Distribution of Themes – amazon Brands Only



SOLIMO

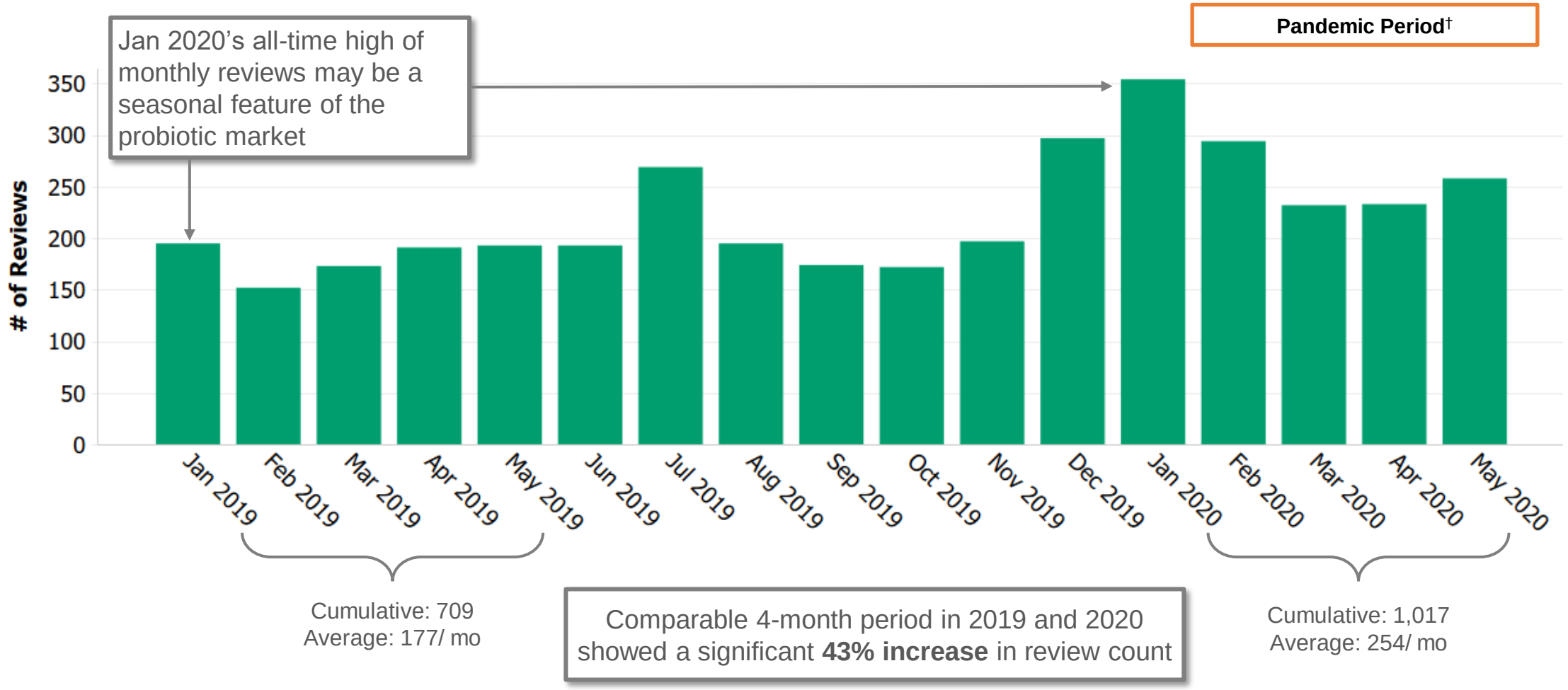
revly

Half as many Amazon brand customers referenced *Severe Digestive Issues* suggesting that their private label is not yet trusted for major issues

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Overall review volume for probiotics had been increasing prior to the pandemic and continued that trend over the last 3 months

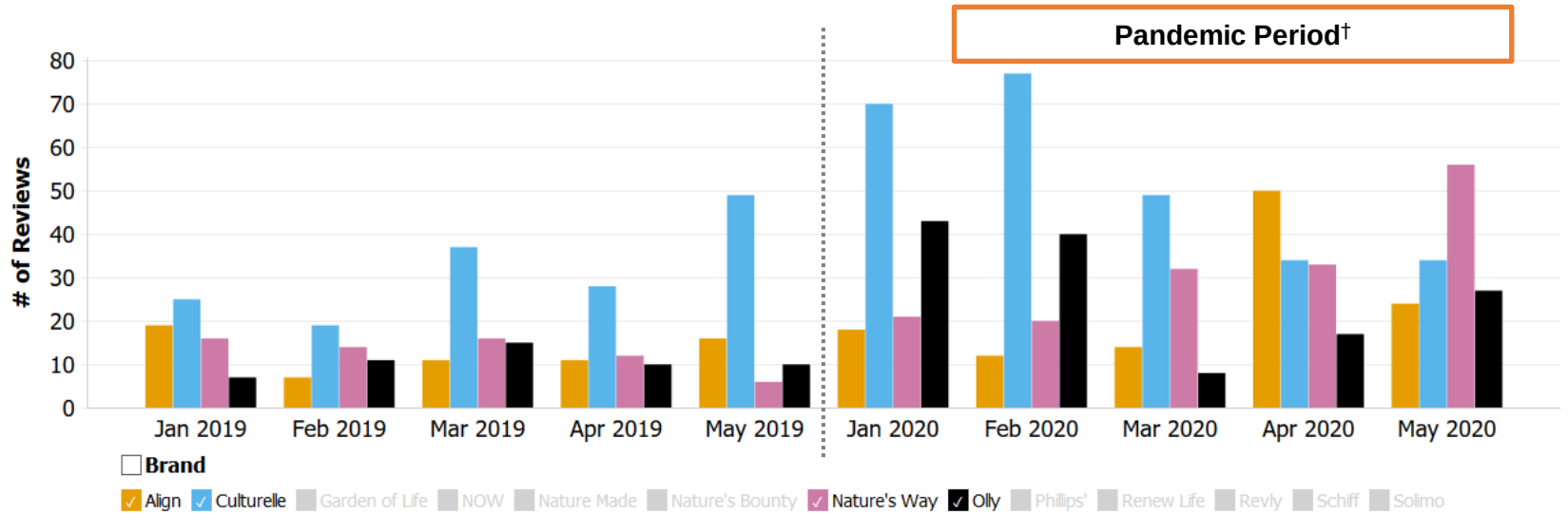
All Brands Review Volume – Jan 2019 to May 2020

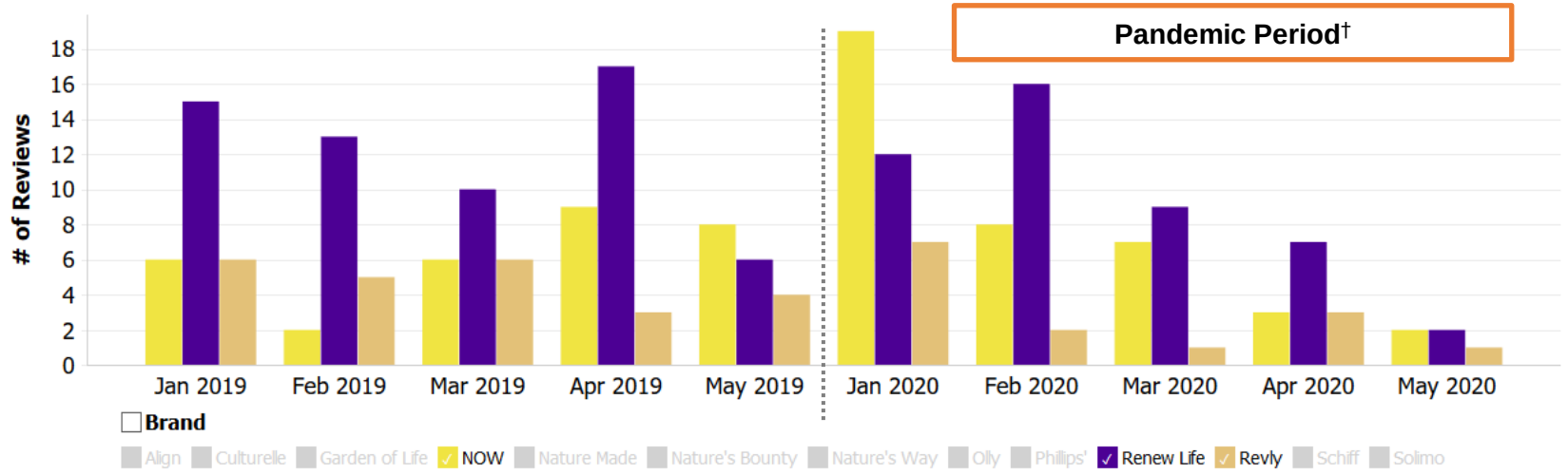


† On Feb 29th, the first reported coronavirus death was reported in the US. By March 26th, the US led the world in confirmed cases.

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Digging deeper, we see that some brands experienced review growth at the expense of other brands during the pandemic





Pre and Post Covid-19 Relative Periods

Brand	Feb – May 2019	Feb – May 2020	Δ
Nature's Way	48	141	*194%*
align	45	100	*122%*
OLLY	46	92	*100%*
Culturelle	133	194	*46%*
now	25	20	*-20%*
RenewLife	46	34	*-26%*
revly	18	7	*-61%*

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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.