

SUNSCREEN REPORT

Content

Sunscreen - executive summary	2
2009-2010	2
2013	10
2013 – Datamonitor report	11
Canada Market	11
Statista – sunscreen regarding stats	12
Interesting details – presentation from prezi.com	19
Winter Travel statistic	21
Sunscreen Cost	23
Assessing the Current Market of Sunscreen: A Cross-Sectional Study of Sunscreen Availability in Three Metropolitan Counties in the United States	29
Consumer Reports Rates Best Sunscreen Buys	31
Non-greasy vs non-drying natural sunscreen	33
Why You Should Only Use All Natural Sunscreen	34
Sun-Protective Behavior Rates	39
Sources	41
Appendix: Sunscreen Use: Surprising Statistics	42

Sunscreen - executive summary

2009-2010¹

Most consumers are reasonably well aware of the risks connected with sun exposure and sun care manufacturers are getting more creative and developing products boasting multifunctional benefits. Nadia Di Martino reports

In August 2010 while the US was dealing with a sluggish economy and fears of a double-dip recession overcast the global markets, clouds also made their appearance, with the UK for example apparently witnessing the coolest August since 1993. These constraints make last year's growth in the sun care category even more impressive. According to Mintel, savvy consumers were unwilling to trade in safety and continued to invest in sun care and sun protection. In Europe, France and Italy represented the largest markets, with estimated sales for 2010 standing at €389m and €374m respectively, according to the research analyst. In the UK total sales of sun care rose an estimated 4% to £284m. In Germany sales stood at around €239m while Spain recorded more modest results totalling €148m sales. In the US the sun protection and sunless tanning market was worth \$701m and was oriented towards 'ultra' and 'sport' protection that drove an increase of \$77m from 2009 to 2010.

Despite good results overall, the recession hindered sales of aftersun and self-tan products. Many consumers found aftersun products superfluous and instead just carried their regular skin care treatments to their holiday destinations, leaving the category down 3% in the UK. Globally, sunscreen and sunblock remained the most developed sub-segments, which shows increased awareness about skin cancer and skin ageing is further improving consumer attitudes towards tanning. In the last few years, education in this area has been widely promoted through cooperation between manufacturers and cancer organisations and it appears that safety messages are having an impact.

“Educating consumers is important as there are factors to be aware of such as sun protection factors, skin types, ensuring the right amount of product is used and then reapplied. This goes hand in hand with producing products that people want to use. If the formulation and format are well received by consumers, they are much more likely to use and then reapply, increasing the chances of adequate protection,” explains Richard Duplock, brand manager, Nivea Sun.

Category	2009	2010
Sun care total	7622.37	8182.31
Aftersun	600.59	617.68
Self-tanning	538.50	532.26
Sun protection	6438.28	7032.37
<i>*Preliminary</i>		<i>data</i>
<i>Source: Euromonitor International</i>		

¹ http://www.cosmeticsbusiness.com/technical/article_page/Sun_care__added_benefits/60853

Last year Cancer Research UK teamed up with Superdrug to set up the Safe in the Sun Campaign which provides consumers with in-store educational information and free samples of sun care products to promote sun protection.

In the US drugstore chain Rite Aid teamed up with Aveeno for The Skin Cancer Foundation's Road to Healthy Skin Tour while Neutrogena partnered with the American Society for Dermatologic Surgery to tell consumers to 'Choose Skin Health'. It is worth highlighting that sun care consumers are more often women as they are more likely to place a higher premium on protecting skin, particularly those aged 35-44.

"Women's magazines have done a great job of promoting sun awareness in recent years, however there is not really an equivalent source of information for men, and this may partly explain why men seem to be less likely to use sun protection," comments Nina Goad, communications manager for the British Association of Dermatologists (BAD). "Women are also more aware of the skin ageing effects of the sun and many women use sunscreen as a means of keeping wrinkles at bay. For men, this seems to be less of a concern and they often regard sunscreens as a beauty product."

In 2010, as part of its Sun Awareness Campaign in the UK, BAD devised a new skin cancer campaign called Ultimate Skincare, which borrows the terminology and imagery of the beauty industry to reach women. To create a buzz and draw consumers' attention to the importance of early detection of skin cancer, BAD designed a jar that resembles a high-end beauty cream but in fact contains a mirror with instructions on how to go about checking skin.

Spray factors on the up

According to a survey of 1,000 British women, 30% feel sticky and greasy at the end of the day because of the build-up of sun protection products; 30% avoid factors above SPF30 because they take too long to rub in and 34% look for a combination of looking stylish and having hydrated skin in the sun. With this in mind, Piz Buin launched the new collection In Sun Ultra Light Sun Spray. SPC spoke to Aurelie-Anne Gaillard, Johnson & Johnson research and development franchise leader about the brand's achievements

"There has been quite a lot of communication in recent years around the danger of sun exposure, so I think consumers are now more aware of them than before and in the UK Piz Buin has seen growth in higher SPF sun protection – SPF30-49 was up 8% and SPF50 was up by 10%. In 2010 the purchase frequency of sun care products was 1.3 times per year. "The major opportunity in the market now is to increase category penetration, which is currently 28% in the UK. This can be done by increasing the consumer's sun care awareness. "We use raw materials, and particularly sun filters, that are all authorised for use in cosmetics by the European Commission, which means that their safety has been reviewed and validated by experts at the European level. Moreover, all our finished products go through a strict safety testing procedure during their development to ensure their safety. "In parallel, our communication also educates consumers and reinforces the message around sun protection by making the link clear between enjoying the sun safely and applying sun protection.

"To give you an idea of Piz Buin's success, the UK is a good example. The total sun protection category here is impacted by British weather peaks plus summer holidaying trends, with sales peaking between May and July. "In the UK market Piz Buin has seen steady

growth continue with the sun preparation market growing by 4.2% to £218m. Meanwhile the sun protection market grew 4% to £143m. In terms of format growth, SPF factors 30-49 grew 8% and SPF50 10%. “We strive to create products that consumers will love to use without any compromise on efficacy.”

Added benefits

Consumers have become more demanding. Gone are the days when sun protection simply meant protection from sunburn. Manufacturers have responded to consumers’ needs by tapping into a variety of niche segments. In the US especially, where the sun protection and sunless tanning segments have increased by nearly 50% since 2005, manufacturers have focused on high protection, including SPF100+. Further innovation has come from new ingredients, high-tech products and environmentally friendly products. Spanish brand Denenes has had success in the US with its sunscreen Parafarma Solar SPF50+, which is claimed to protect against jellyfish stings. New possibilities for product development are also being developed for black and Hispanic skin concerns.

Additional benefits such as this anti-jelly fish sting formula from Denenes are popular developments. According to senior European beauty analyst at Mintel, Vivienne Rudd: “While UV protection is naturally the most important component of sun protection products, it would be hard to get consumers to use them regularly if they didn’t have cosmetic properties such as a pleasant texture and fragrance. However consumers are now looking for even more than this.” Rudd points to a new generation of sun protection products that also offer antioxidant, moisturising and nourishing ingredients. “Nivea, Ambre Solaire and Soltan are successful especially because they have managed to convey the dual message of effective protection and skin care. Other brands such as La Roche-Posay, Avène and RoC have more of a pharmacy image and play well with consumers who are looking for a sense of additional reassurance, particularly if they have sensitive skin.”

The crossover between sun protection and skin care has become a valuable marketing tool for manufacturers. Mintel estimates that 20% of all sun care launches in the prestige sector contained skin caring claims, with brands such as LVMH’s Dior and L’Oréal’s Lancôme basing their lines on protection against premature signs of ageing due to sun exposure. Half of sunscreen launches in 2010 featured moisturising and hydrating claims, a third were fortified with vitamins and minerals supporting the skin and a third were formulated for sensitive skin, according to Mintel.

St Tropez, recently bought by soap manufacturer PZ Cussons, entered the sun protection market with the launch of its first high-performance sun care line with skin care claims. The five sku line – two body products, two face products and an aftersun feature the ingredient Melanobronze, derived from the berries of monk’s pepper and said to stimulate melanin production. The brand deliberately chose high SPFs for the products (SPF20 is the minimum) for enhanced protection while muru muru butter, vitamin E and raspberry oil help moisturise and soothe.

The first foray in to sun care by St Tropez blends skin care benefits with high level sun protection Sally Lewis, head of product development comments: “The brand thought it was logical and natural to step into sun protection. We’ve spent three years in the laboratories developing our new SPF range and have worked with skin cancer charities included Sskin to ensure we communicate the correct message to the public.”

Swiss brand Juvena launched the Prevent & Optimize Top Protection SPF30, described as an anti-ageing sun care product with thorough UV protection. According to the company its light formula containing ultra-fine gold particles leaves the skin feeling soft and for this reason it can be used either alone as a day cream or on top of the usual face care product. “The fact that our products are mainly anti-ageing creams with the extra benefit of sun protection means they have been less hit by the recession,” says international brand director Inga Risop.

According to Juvena there are many opportunities for more expensive products to succeed as they deliver additional benefits to sun care consumers. Risop continues: “When it comes to sun care the mass market plays a major role as it offers good price value for consumers. But if a consumer needs special advice or is searching for an extraordinary combination of sun protection with anti-ageing features, you’d better search in the selective channels. One of the challenges is to build the sun care segment in the selective channel further and educate consumers about the differences vs the mass market.”

Hawaiian Tropic has marketed its new Shimmer Effect sun care range under the banner Skin Beauty. The three products – an SPF20 and SPF40 lotion and an aftersun lotion – contain mica pigments said to enhance and highlight skin tone, as well as a blend of antioxidants to protect skin against free radical damage.

The other side of the coin is that most facial moisturisers and anti-ageing products today incorporate an SPF of up to 15, with some going as high as 20 or 25; for instance Boots has recently relaunched its Protect & Perfect day creams with SPF15. Meanwhile colour cosmetics have also become increasingly involved, with foundations, face powders and lip products featuring high SPFs. Mineral make-up is even more competitive as products often contain titanium dioxide, a very common UV filter.

Table : Global sun care market value, 2010 (US\$M)*

Category	2009	2010
Australia	140.96	149.71
US	1390.51	1509.33
France	435.54	444.92
Germany	204.83	197.97
Italy	482.74	477.33
Spain	523.05	530.12
UK	442.42	455.29

**Preliminary data*
Source: Euromonitor International

Table: UK Retail Value Sun care sales by SPF, 2008-09, £m

	2009	2010*	%
<spf10< td=""></spf10<>	13	9	-50.0
SPF11-15	25	22	-12.0
SPF15-20	39	44	25.7
SPF30-50	65	72	9.1
SPF50+	66	73	43.1
Total	208	220	12.8

**Estimated* *Source: Mintel*

However this can all be confusing for consumers. BAD says if SPF used in moisturisers isn't tested to the same standard as sunscreens these formulas are less likely to be rub-resistant and water-resistant and most importantly they are likely to be applied a lot more thinly than sunscreens. "They are unlikely to offer the same level of protection. A moisturiser with an SPF will protect against small amounts of UV exposure, but sunscreen remains better suited for longer, more deliberate UV exposure. Consumers must also be aware that moisturisers containing an SPF may not contain any UVA protection," says Kimberley Carter, campaigns PR officer at BAD.

SkinCeuticals focused on mineral sunscreens and is launching Sheer Mineral UV Defense SPF50 for all skin types. The formulation uses mineral filters rather than chemical ones. It also features *Artemia salina*, plankton extract claimed to increase skin's natural defence to UV and heat stress. The lightweight formulation provides a mattifying, transparent finish.

Mass market brands such as Superdrug Solait are attracting consumers with price promotions, while ModelCo claims its Tan in a Can was a world first

Meanwhile the mass market is finding its own differentiation, offering affordable sun protection lines with added skin care properties.

This year Superdrug own brand Solait is gearing up launching the 'Buy 1 get 2 Free' promotion in spring in Superdrug stores in the UK and is also offering a flat pricing policy on sun care so that consumers can buy any SPF at the same cost. "We have teamed up with Cancer Research UK and they recommend using SPF15 as a minimum," says Martin Crisp, head of pharmacy for Superdrug. "The same-price-policy that Superdrug has implemented is meant to encourage consumers to use the correct SPF. Many people underestimate the power of the sun in the UK and assume they can get away with an SPF15 protection which is often not enough." The Solait Anti-ageing Facial Suncream SPF50+ is claimed to offer the highest protection and to protect skin better than any beautifying cream at a fraction of the price: it costs £5.99 for a 75ml pot.

Boots has repackaged its Soltan range with improved formulations. The Soltan Once collection has also been enhanced with a spray format. And a new aftersun product incorporates insect repellent.

Direct seller Avon is also following the anti-ageing/sun care trend in launching its Anew Solar Advance line. The result of ten years' research, the line includes Sunscreen Face Lotion SPF45, Sunscreen Body Lotion SPF30 and Sunscreen Body Mist SPF28. All products feature RepairShield Technology designed to protect skin by stimulating its natural antioxidant defence system to fight free radicals and repair skin from sun damage by activating its natural repair process.

What is revolutionary, according to the company, is that in vitro tests show that RepairShield Technology repairs 50% of skin cell damage in 24 hours.

Avon researchers examined new ways to enhance the repair of UV induced damage and discovered a blend of phytochemicals and extracts said to be ideal. These ingredients were also found to help stimulate the skin's own antioxidant enzymes thus promoting cell recovery. "Our patented RepairShield Technology is a great example of how we have applied our extensive anti-ageing expertise with profound understanding of sun care to deliver an effective product to help protect against and reverse sun induced damage to the skin," comments Anthony Gonzales, senior manager, Avon global research and development.

Do it yourself

The self-tan sector remains muddled with a plethora of rather unclear product launches that have tended to confuse consumers. As a result many at some point have given up. Others have gone for gradual tanning body lotions and some real tan aficionados have unfortunately returned to the sunbed, so sales of self-tan products have suffered.

“The tanning category is now very competitive with so many brands expanding their range each season,” explains Shelley Barretts, founder of Australian beauty brand ModelCo. “We launched the product Tan in a Can years ago – that was a world first. It created a whole beauty category and changed the way women self-tanned for ever. The main challenge now is that our competitors copy many of our first to market product creations.” But it’s not all gloom for the category. “Creating a fake tan allows women to have the option to have a flawless tan without ever having to expose to the sun and I consider this to be very safe,” adds Barretts.

Manufacturers are bringing out new self-tan brands including Makebelieve and recently Sinless Sun (United Beauty), a collection of seven new products including self-tanning mists, crèmes, body moisturiser and body scrub.

St Tropez is exploring the natural avenue, launching Naturals, a collection of self-tanning products claimed to be ideal for sensitive skin that feature Vegetan, a 100% naturally derived equivalent to DHA, the active ingredient in sunless or self-tanning skin care products. The line is Ecocert approved and is targeted to consumers who long for a natural self-tanning option and added skin care benefits. Products feature avocado butter said to soothe and moisturise skin while promoting a radiant complexion. St Tropez Naturals features Radiance Self Tan for Face, Self Tan Milk and Self Tan Lotion.

Lighten up

Lightweight is at the centre of many recent launches. Nivea Sun, which according to data from AC Neilson had the world’s largest market share value in 2009, has introduced the new Invisible Protection in SPF 50; the range launched in SPF 10, 20 and 30 in 2009. The transparent formulation promises a non-greasy texture.

Light lotions and spray formats are increasingly popular options for sun protection products

In the US, Neutrogena focused on ease of application with the launch of Wet Skin Sunblock Spray, designed to be sprayed onto wet skin for sun protection. The formula contains Helioplex, which cuts through water on the skin to form a protective barrier, says the company.

And Biotherm’s new Lait Solaire range claims to combine the light texture and moisturising properties of the brand’s existing Lait Corporel body lotion with broad-spectrum sun protection.

“Demystifying the category and ensuring consumers understand how to use the products correctly offers the biggest challenge and opportunity for the category,” believes Duplock.

“Research shows that consumers often don't apply enough product or reapply frequently enough which can reduce the level of protection.”

According to Mike Brown, senior scientist/advisor at Boots, manufacturers are aware they have to take part of the responsibility for this. “Heavy greasy formulations have, for many years, been a deterrent for many,” he says. “Lighter feeling formulations are proving very popular, however to attain high factors with high UV protection is technically very difficult. Boots continues to deliver on its promise and offers maximum UVB and UVA protection on even its sheerest formulations.”

While not burning remains the main priority, manufacturers are aware their task is to develop multidimensional products that will interest consumers beyond the practicalities. If the industry keeps focused on education and practical formats and adds a point of difference, a globally winning category that has defied recession and bad weather can only shine brighter in the future.

2013²

Trends

2013 marked the first year that sun care value sales declined in the last decade. Sun protection, which accounts for 86% of overall value sales, was the determining factor, with a current value decline of 2%, falling to US\$1.4 billion. Self-tanning and aftersun, which accounted for the remaining 10% and 4% shares respectively, both saw modest gains. Self-tanning grew by 2% in current value terms to reach US\$171 million, and aftersun grew by 3% to reach US\$64 million.

Competitive landscape

In 2013, Energizer Holdings, Merck & Co and Johnson & Johnson Consumer Products continued to account for the majority of value share in sun care in the US. Energizer Holdings led with a 22% value share and sales of US\$376 million, followed by Merck & Co with 20% and US\$331 million and Johnson & Johnson with 18% and US\$295 million. Energizer Holdings has continued to generate the most retail value sales of all companies since its acquisition of Banana Boat and Hawaiian Tropic in 2007.

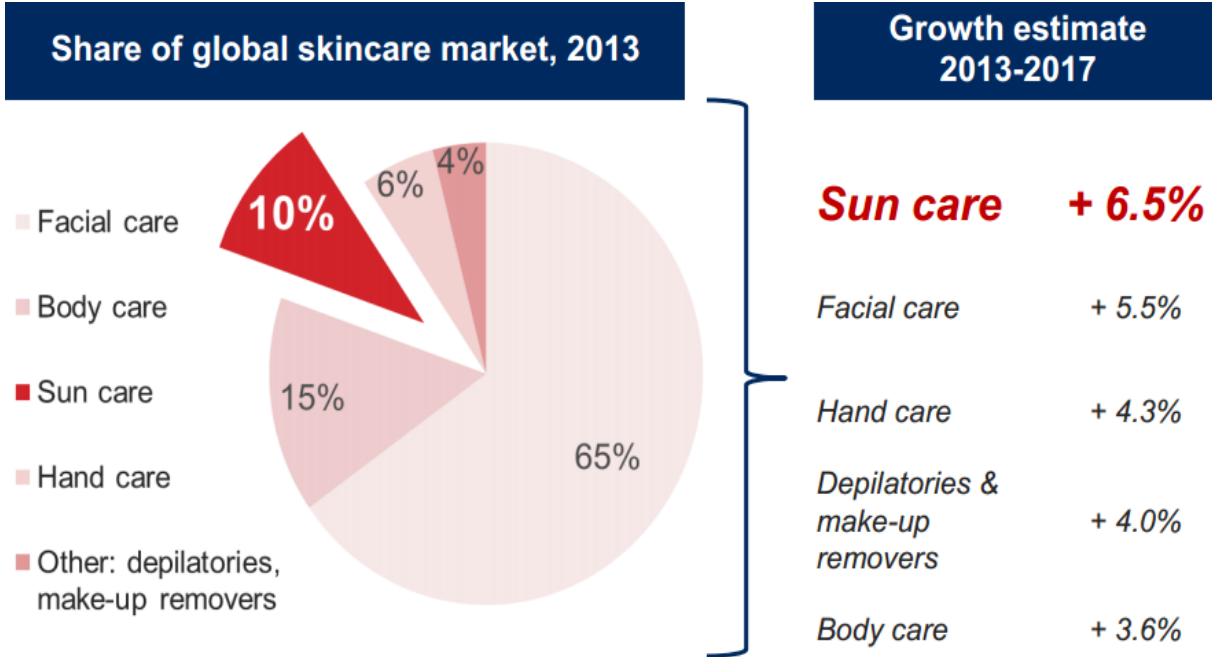
Prospects

Sun care in the US is projected to increase by 9% over the forecast period in value terms at constant 2013 prices, to reach US\$1.8 billion in 2018. The CAGR over the forecast period is expected to be 2% in value terms at constant 2013 prices, which is equal to the performance in the review period. Mass sun protection, which accounted for an 82% share of value sales in 2013, will be the primary driver of sales in sun care. Despite a decline in 2013, mass sun protection is predicted to rebound and drive future growth, although at a decreasing rate. As a result of numerous awareness campaigns, consumers are more informed than ever about the effects of sun exposure and the risk of skin cancer and accelerated skin ageing. This has been

² <http://www.euromonitor.com/sun-care-in-the-us/report>

a notable factor in sales growth in mass sun protection. Moving forward, however, it will be increasingly difficult to educate the remaining population. Campaigns are progressively more focused on the demographics that historically exhibited lower use of sun protection, such as males, African Americans and Hispanics. These demographics pose a large opportunity for sun protection, but also the most challenging to reach and influence behaviour.

2013 – Datamonitor report



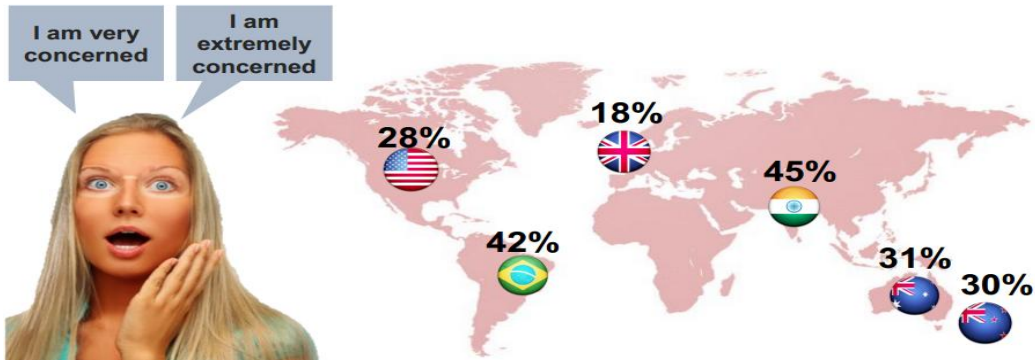
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Global value of sun-care market was \$8.7bn in 2013

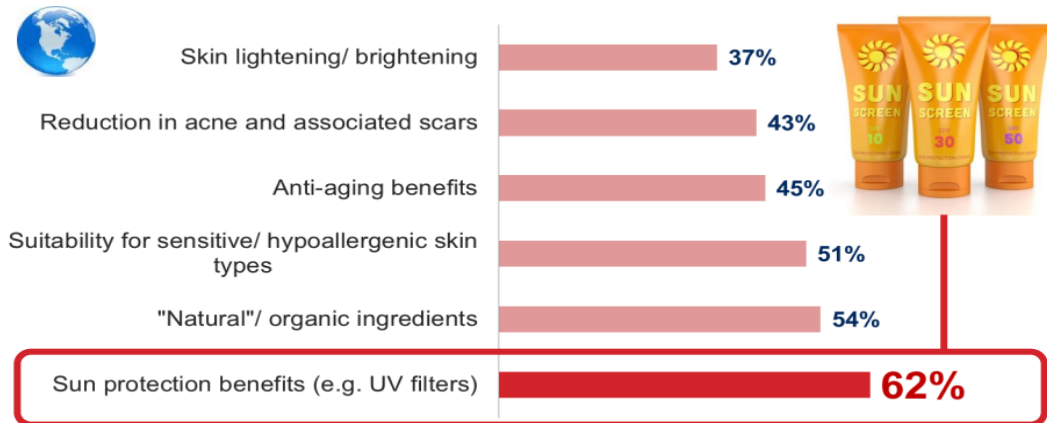


http://www.reedexpomobile.com/RXUK/RXUK_InCosmetics/2014-website/Marketingtrends/2April_1245-1330_Suncare%20Innovation%20Trends_Datamonitor_V2.pdf?v=635326494112650090

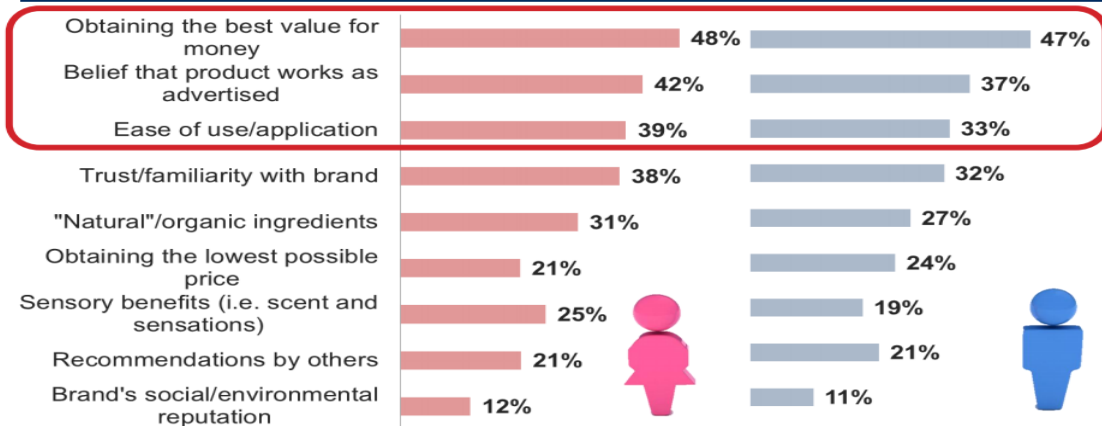
2014: Consumers who say they are highly concerned about sun damage



2013: Skincare shoppers who say the following product benefits in skincare products i.e. body creams/ facial creams, are essential or high priority



2013: Factors that have a high influence on sun-care product choice



http://www.reedexpomobile.com/RXUK/RXUK_InCosmetics/2014-website/Marketingtrends/2April_1245-1330_Suncare%20Innovation%20Trends_Datamonitor_V2.pdf?v=635326494112650090

According to the *Journal of Cosmetic Dermatology*, there are over 200 sunscreen manufacturers in the U.S. currently making over 4000 different sunscreen products.

<https://www.futurederm.com/2012/07/06/should-you-buy-sunscreen-from-europe-or-japan-instead/>

Canada Market³

While overall sales in sun care may be lagging in Canada, some segments within the category are showing double-digit growth. Mass-market face products, for example, jumped 32% in dollars and 25% in units sold, according to Nielsen data provided by Ombrelle. Considering that exposure to UVA rays is linked to premature aging, it's no surprise that facial products with sun protection are getting popular. In response, manufacturers are developing sunscreens with added anti-aging components.

But a lot of the innovation lately is aimed at making it easier for consumers to use the products, whether they're outside for fun or for work. Simply put, people want sunscreens that are waterproof, or non-greasy, or fast absorbing, or that offer moisturizers. Over the last couple of years, for example, sun-care manufacturers have introduced continuous sprays that are easier to apply and have a lighter and less greasy texture compared to traditional lotions. "Consumers with busy lifestyles are continuously seeking convenient and efficient ways of putting on sun protection," says Desroches.

Also gaining popularity are products with an SPF of 30 or more. Last year, dollar sales of sunscreens with an SPF of 60-plus grew more than 200%, says Desroches; however, a consumer study conducted by L'Oréal Canada found an interesting insight regarding SPF levels. On average, users think that the maximum level at which it would not be worth using a higher level of SPF is 48. Clearly, consumers have a preconceived notion of how much protection they need.

Are they wrong? Not really, says Rivers. Consumers have it just about right while being a bit on the safe side. "I recommend that people use a product with SPF 30 or higher. But there is no benefit to going above 50 SPF. [Anything] higher than that is more about marketing," says Rivers, who is developing a combination sunscreen and moisturizer for his own high-end skin-care line, called Riversol.

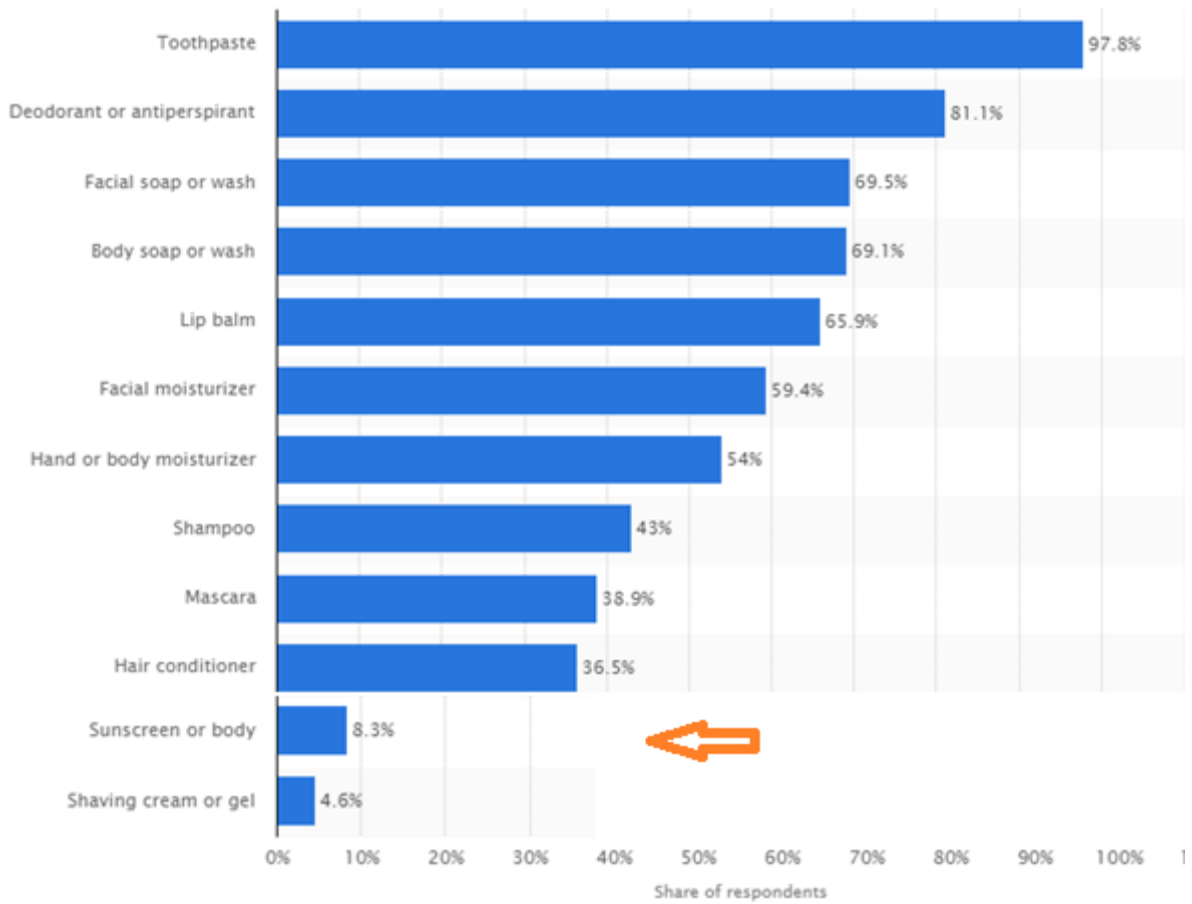
Consumers who still want a tan without the risk of sun exposure can always turn to sunless tanners, a segment now worth about \$8.6 million in all channel sales. Launched with great fanfare a few years ago, sunless tanners have been going through a period of "right-sizing" after explosive growth, says Wendy Montgomery, a brand manager for Jergens, which launched the Natural Glow line of products in 2005. Nielsen MarketTrack data shows stagnant dollar and unit growth for the pre/instant-tan segment in all channel sales. Grocery is the hardest hit with sales dropping 18% in dollars and 25% in units last year.

Many skin-care manufacturers quickly jumped into the sunless tanning market during the early boom, but significant declines occurred when smaller players exited the market, says Montgomery. Now that the glow moisturizer market has settled, she predicts that ever-increasing media attention to the dangers of sun exposure and indoor tanning will keep sunless tanning top-of-mind as a safe way to achieve a natural-looking tan without the risk. And that may mean even brighter days ahead for sun care.

³ <http://www.canadiangrocer.com/categories/here-comes-the-sun-368>

Statista – sunscreen regarding stats⁴

What type of personal care product do you use on a daily basis?

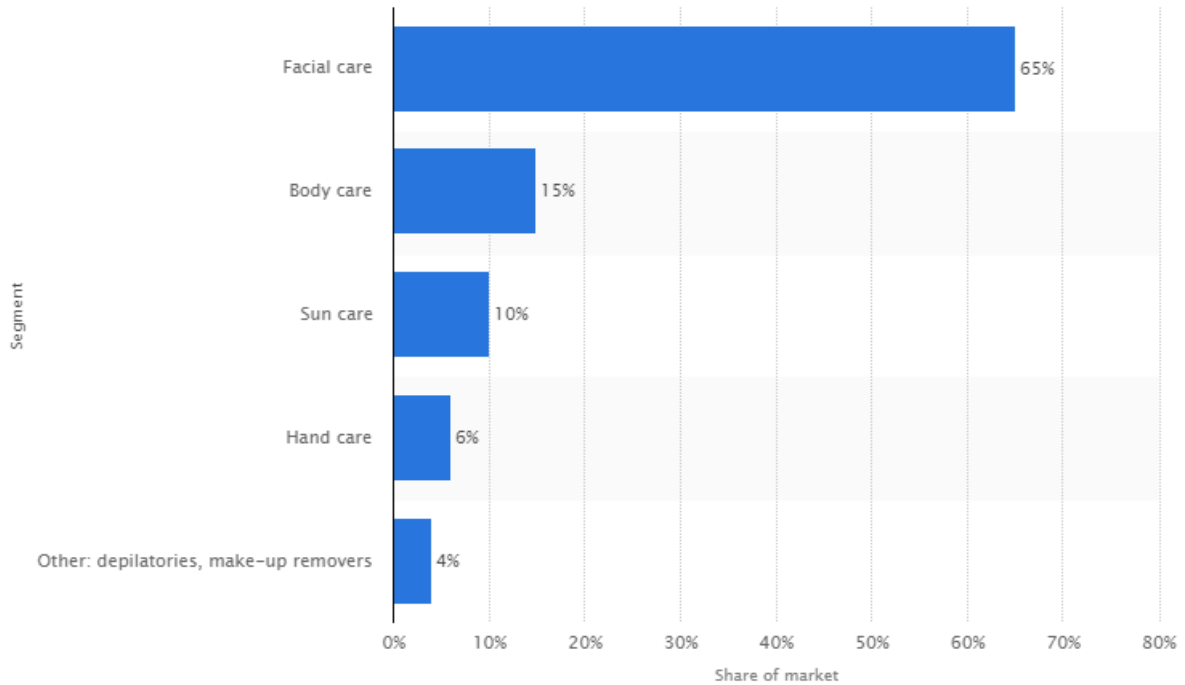


This statistic provides information regarding the personal care products most frequently used by college students in the United States in 2011. The survey revealed that 97.8 percent of the respondents claimed that they used toothpaste on a daily basis.

⁴ <http://www.statista.com>

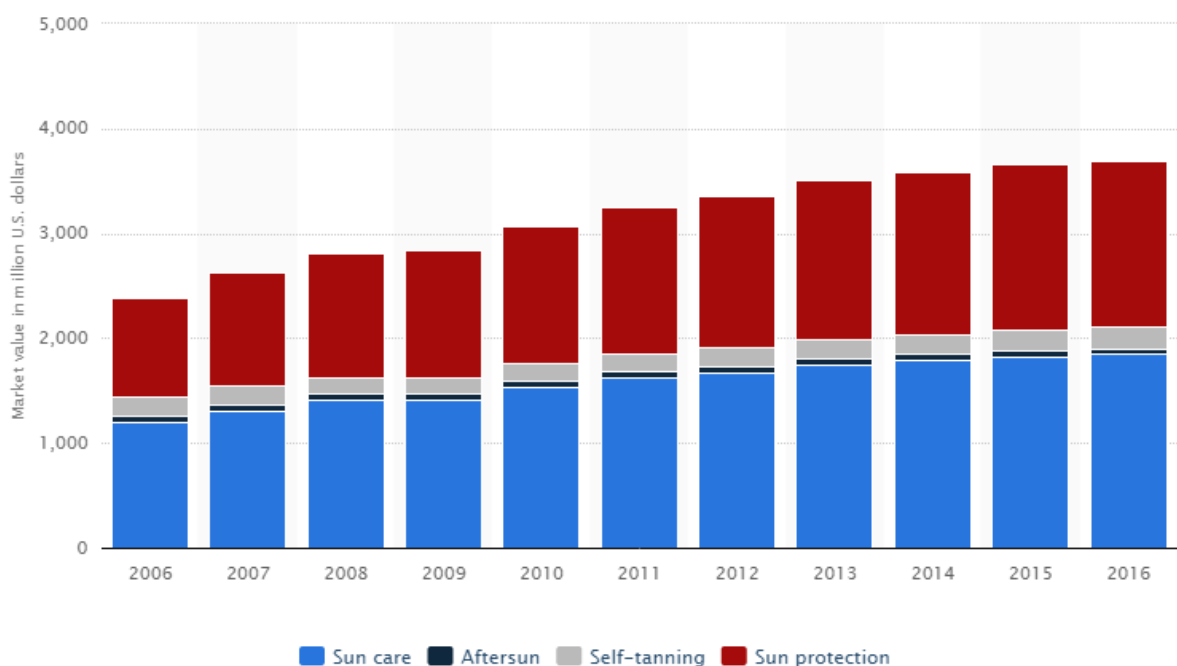
Share of the global skin care market in 2013, by segment

This statistic depicts the share of the global skin care market in 2013, by segment. In that year, the sun care segment made up ten percent of the global skin care market.



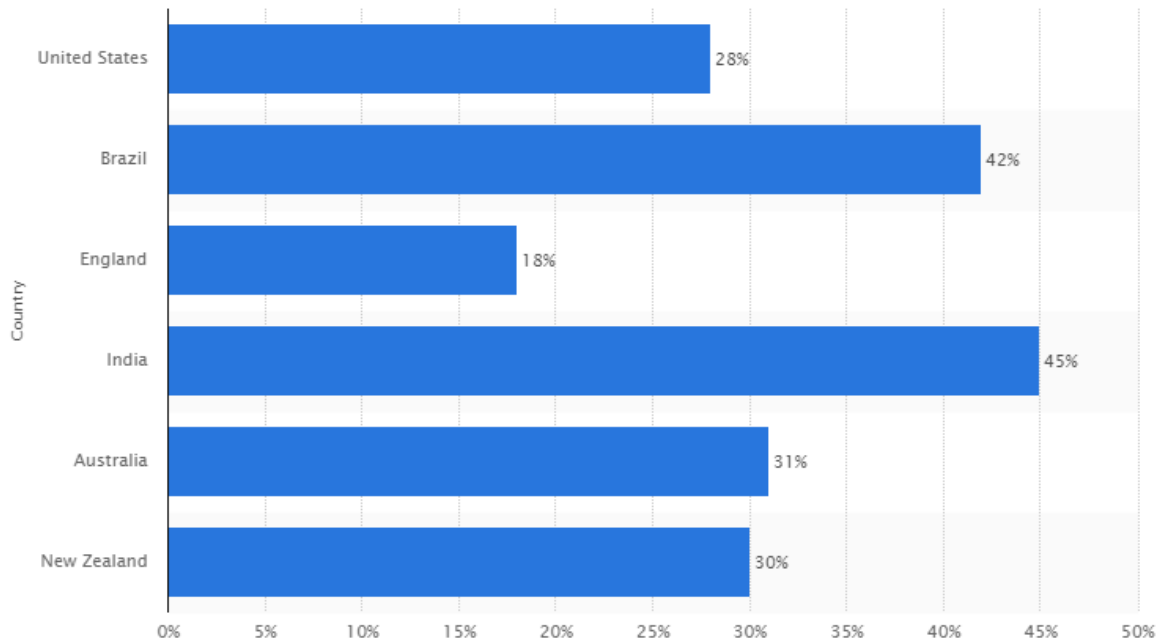
Value of the sun care market in the United States from 2006 to 2016, by segment (in million U.S. dollars)

This statistic depicts the value of the sun care market in the United States from 2006 to 2016, by segment. In 2012, the aftersun segment of the sun care market had a retail value of about 60.2 million U.S. dollars.



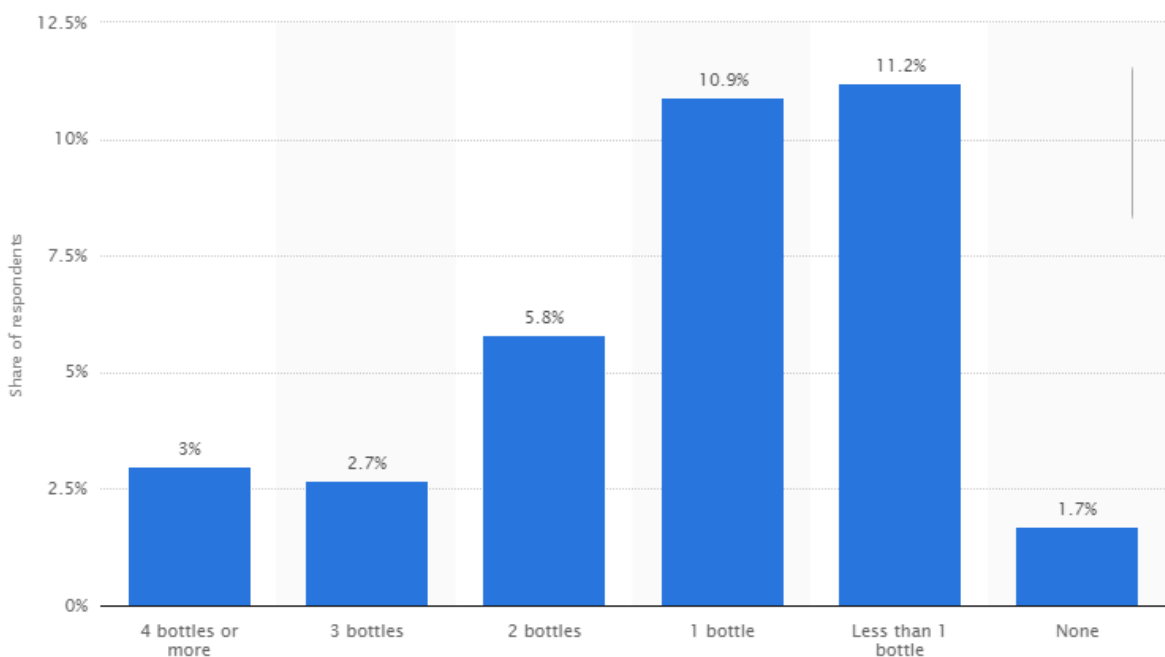
Are you highly concerned about sun damage?

This statistic depicts the share of consumers who are highly concerned about sun damage in 2013, by country. The survey revealed that 28 percent of Americans are concerned about sun damage.



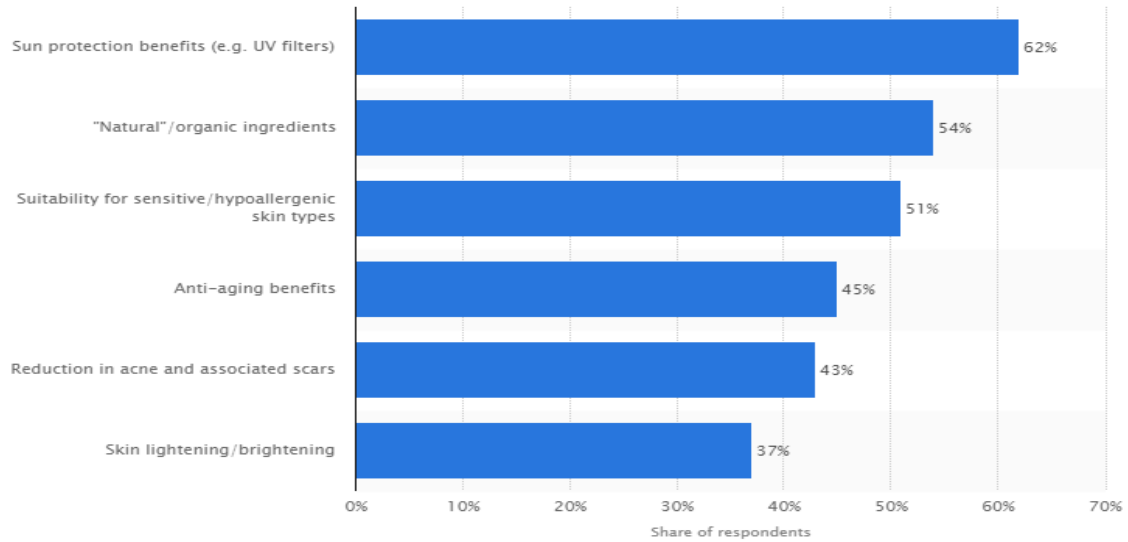
U.S. households: How many bottles of suntan / sunscreen and sunless tanning products for your face did you use in the last 12 months?

This statistic shows the results of a survey conducted from January 2013 to March 2014 among approximately 24,000 American adults about the amount of bottles of suntan / sunscreen and sunless tanning products they have used in the last 12 months. Approximately 3 percent of the respondents used 4 bottles or more during the last year.

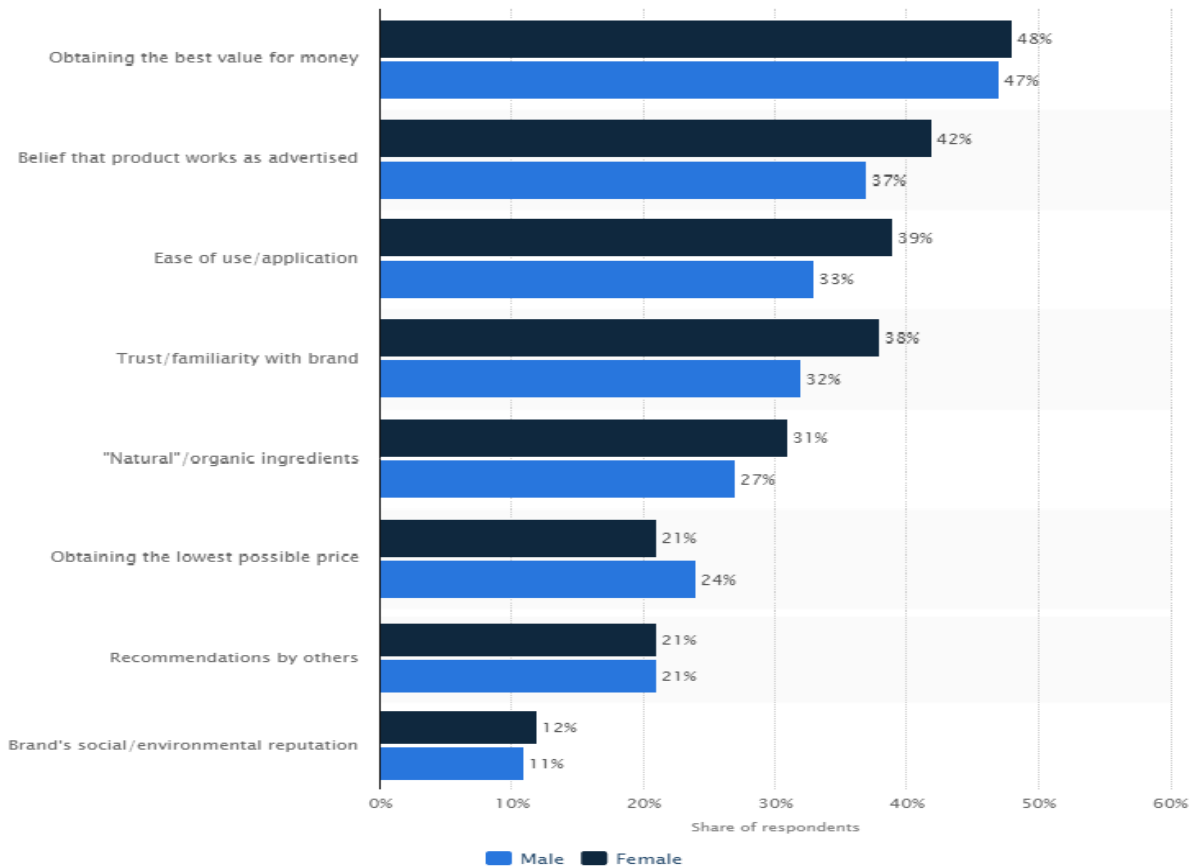


What product benefits are essential when shopping for skin care products?

This statistic depicts highly beneficial product benefits in skin care products among global consumers in 2013. The survey revealed that 62 percent of the respondents said that sun protection is an essential benefit when purchasing skin care products.



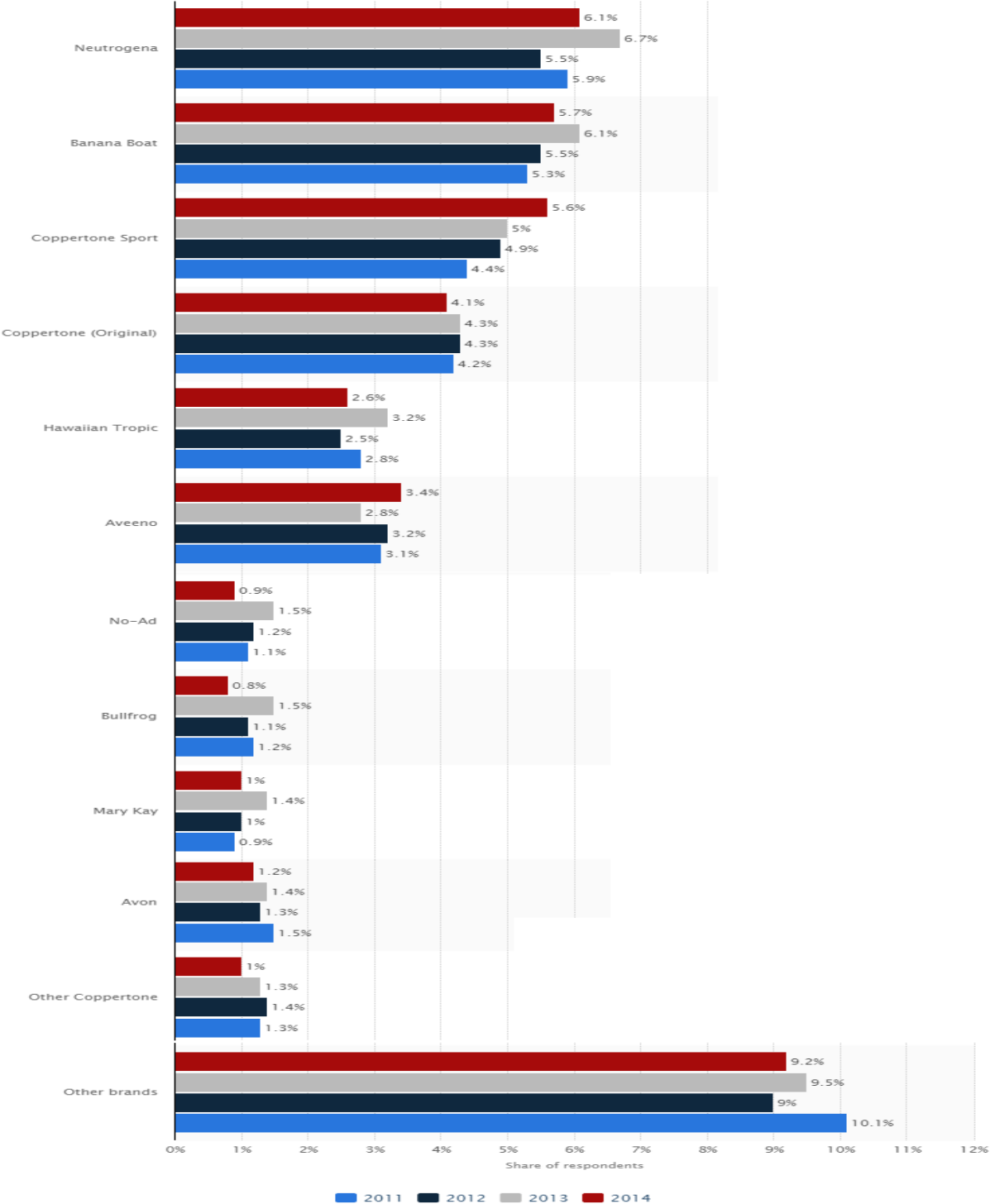
What factors influence you when purchasing sun care products?



This statistic depicts the factors that have a high influence on sun care products choice worldwide in 2013, by gender. The survey revealed that 47 percent of men are highly influenced by obtaining the best value for money when purchasing sun care products.

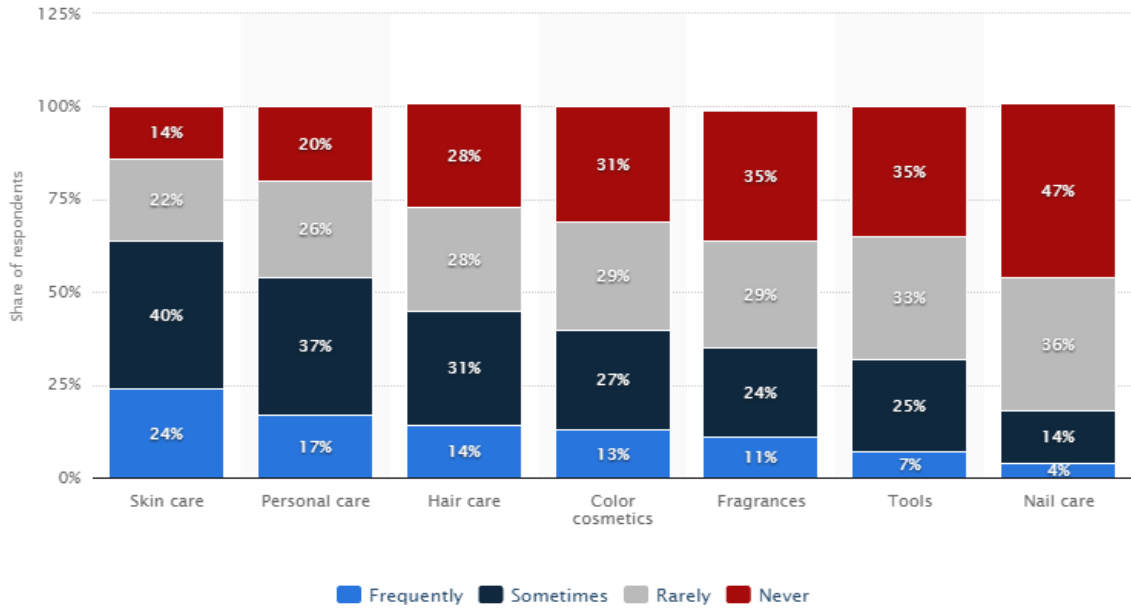
U.S. households: Brands of face suntan / sunscreen, after sun and sunless tanning products from 2011 to 2014

This statistic shows the results of a survey conducted from February 2010 to March 2014 among approximately 24,000 American adults each year on the most used brands of face suntan / sunscreen, after sun and sunless tanning products by the people living in their household. According to this survey, around 6 percent of American households indicated to use Neutrogena face tanning products most often in 2012.



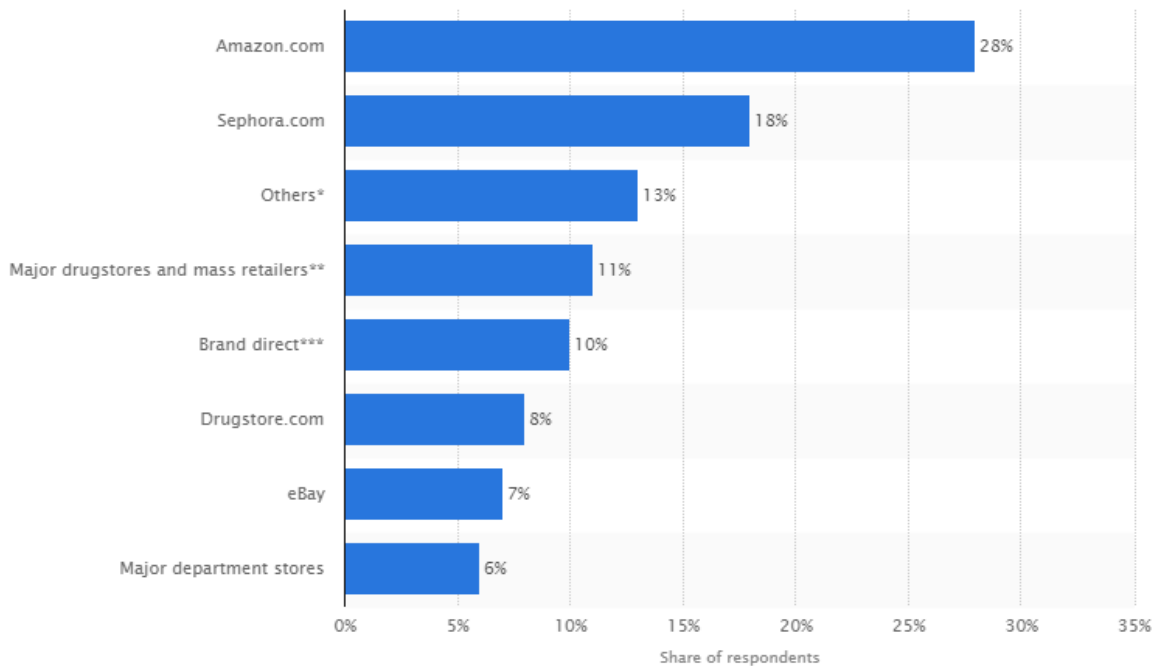
How often do you purchase various personal care products online?

This statistic provides information regarding the frequency of purchasing various personal care products online by U.S. consumers. The survey revealed that 22 percent of the respondents rarely purchase skin care products online.



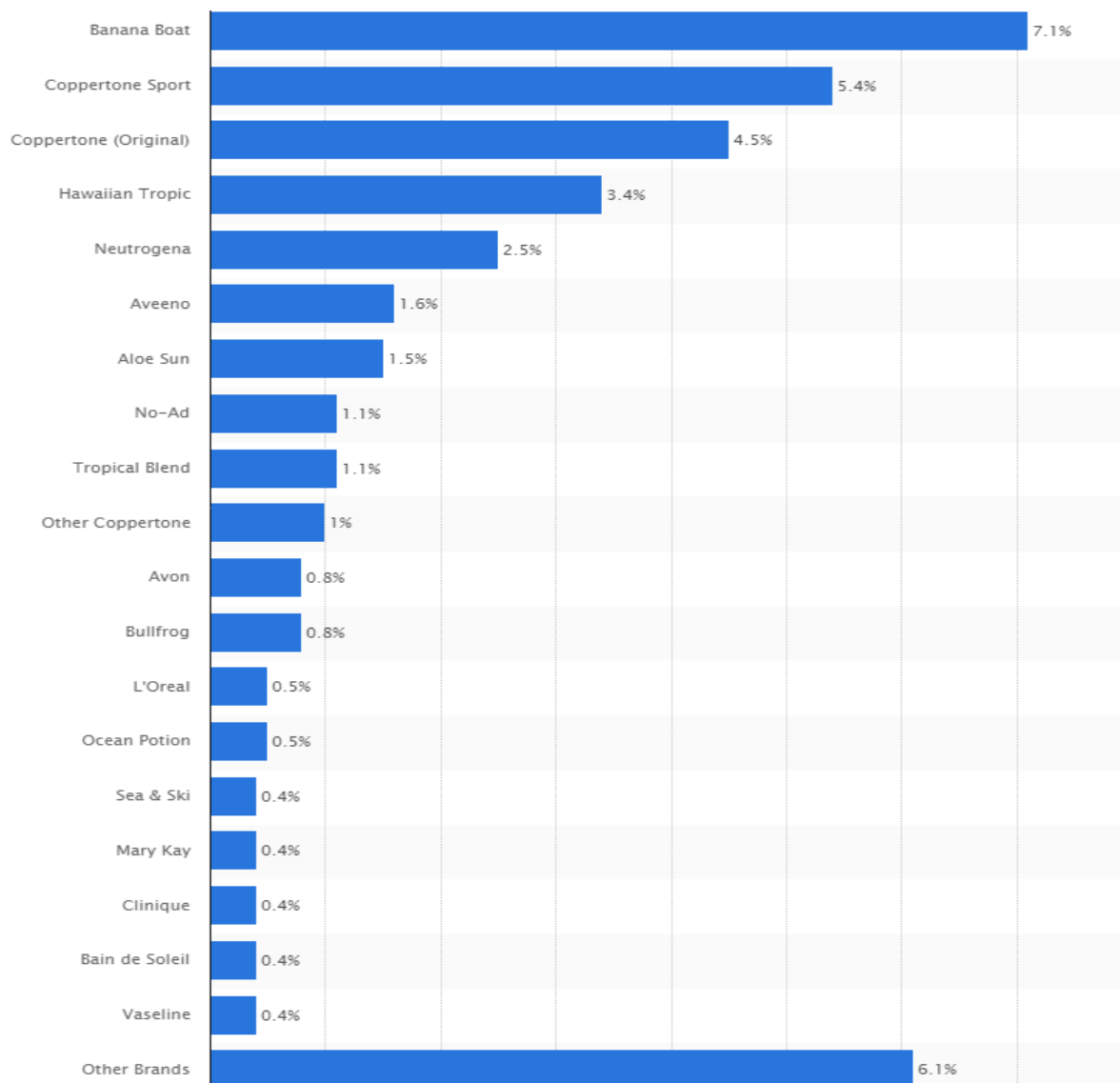
What are your favorite online destinations to shop for beauty and personal care products?

This statistic provides information regarding the leading online destinations for U.S. beauty and personal care shoppers in 2012. The survey revealed that 28 percent of the survey respondents rated Amazon.com as their favorite online destination for purchasing beauty and personal care products.



U.S. households: Which brands of suntan / sunscreen and sunless tanning products for your body do you use most often?

This statistic shows the results of a survey conducted from January 2013 to March 2014 among approximately 24,000 American adults about the brands of suntan / sunscreen and sunless tanning products for their body they prefer. Approximately 7 percent of the respondents prefer Banana Boat.



Interesting details – presentation from prezi.com

SunScreen Market

Currently, the sunscreen market generates \$686.2 million in annual revenue

Sunscreen accounts for 59.4% of the entire sun care market

In the US, 2.3% annual growth is predicted until 2015

The US accounts for 15.8% of the Global Suncare Market

Demographic profile:

Women

Fair-skinned (whites, Asians)

35-44

Sunscreen brands are beginning to cater to more specific demographics as the health care trend rises

Who buys sunscreen?

SunScreen Competitors

Coppertone 4.99% (\$57.4 mil)

Coppertone Sport 4.99% (\$57.1 mil)

Banana Boat 3.36%

Neutrogena Ultra Sheer 3.02%

Hawaiian Tropic 2.82%

Banana Boat Sport 2.63%

SunScreen Competitors

Competing brands position themselves as a health product, a beauty product, or sometimes both

The longest protection for your skin



vs.

Nourishes your skin the best



Family branding is also very common in lip care, burn relief or after sun care

Prices can vary slightly due to form (lotion or spray) or level of SPF

Similar products are generally priced competitively between brands

There are many generic brands, which are priced lower than the brand name sunscreens but contain the same ingredients

Advertising is the most common promotion of SunScreen

With the rising concern with skin cancer protection, sunscreen brands are advertising the health benefits of using their product



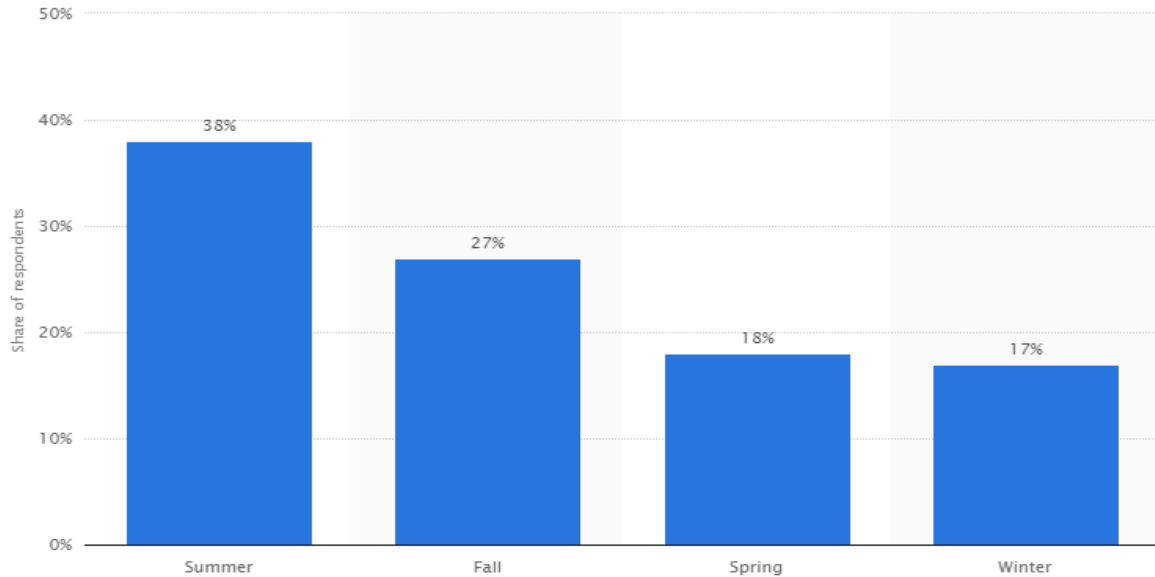
Some brands also offer discount coupons or sunscreen education materials as a promotion

Source: <https://prezi.com/-u8rsry5h57w/sunscreen-market-presentation/>

Winter Travel statistic

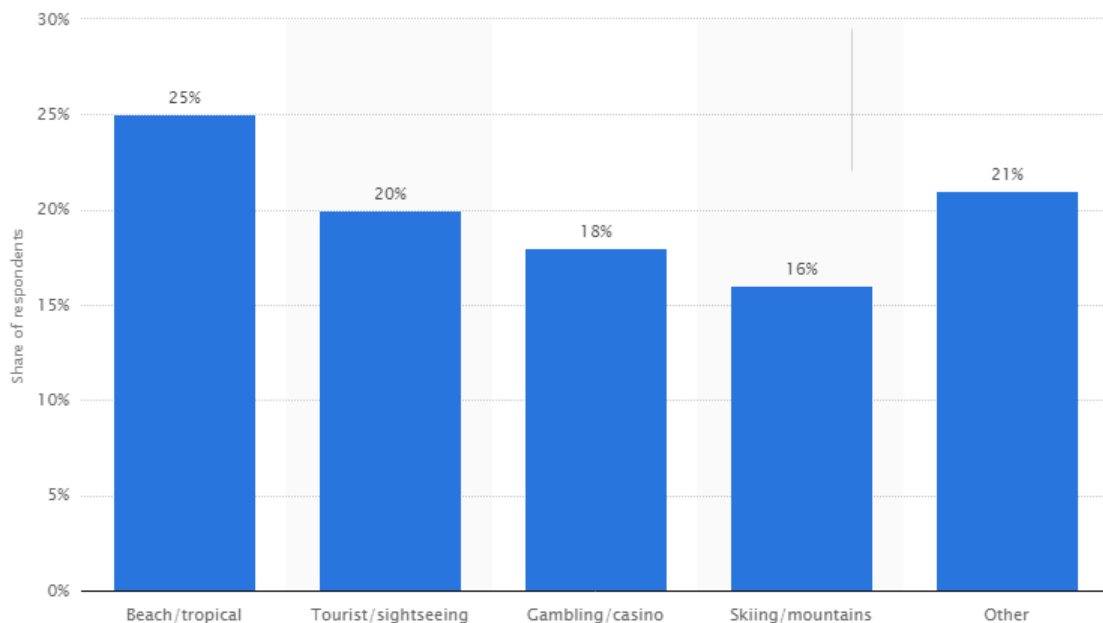
If you could take only one vacation a year, what time of the year would you prefer to take your vacation?

The statistic shows which season is most popular for taking a vacation among employees in the United States. In 2012, 18 percent of respondents stated that if they could only take one vacation per year, they would prefer taking it in spring.



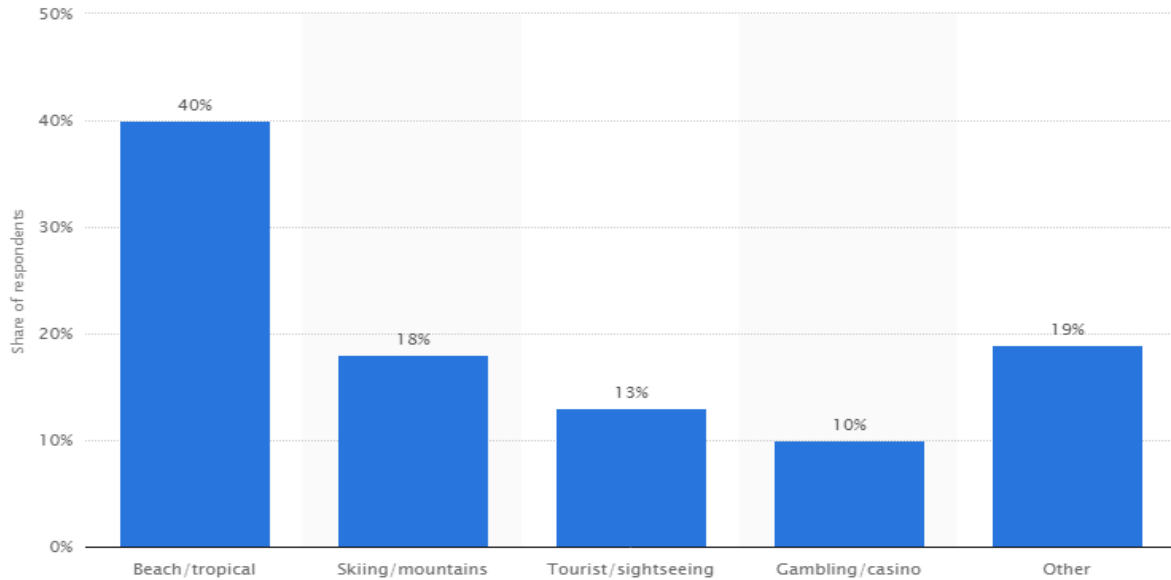
What type of winter travel are you planning?

This statistic shows the type of winter travel planned in the US as of October 2013. During the survey, 20 percent of respondents stated that they planned tourist or sightseeing winter travel and 18 percent said they planned a gambling or casino holiday.



What type of winter travel are you planning?

This statistic shows the type of winter travel planned in the United Kingdom as of October 2013. During the survey, 18 percent of respondents stated that they planned skiing or mountain holidays and 13 percent planned tourist or sightseeing winter travel.



It's no secret that regular use of sun protection not only exponentially decreases your risk for skin cancer, but will also keep your skin smoother, healthier and younger-looking over time. Yet one of the biggest misconceptions about sunscreen is that it isn't necessary aside from, say, the beach or pool. When patients ask me whether they need to wear sunscreen during the winter, I always respond with an emphatic "yes."⁵

First, it's important to understand the difference between UVA and UVB rays. UVA rays—the kind that penetrate the skin and promote collagen breakdown—remain just as strong throughout the winter months (and even on cloudy days), so they can still cause photodamage and an increased risk of skin cancer. This means that daily use of sunscreen is a must to protect against UVA rays.

Though UVB rays, known as the "burning rays," tend to be stronger during the hot days of summer, they are capable of causing sunburn any time of year. In fact, the sun's rays can be up to 80 percent stronger when reflected, and because snow causes a reflection, skiing or sledding—or even being around glass buildings in a metropolitan area—can lead to a sunburn without proper protection.

I recommend a sunscreen with an SPF of at least 30 for daily use and one with SPF 30 to 50 if you'll be outdoors. I tell my patients not to be overconfident when using a high SPF and to reapply frequently, especially if the skin gets wet. Since the skin tends to be dryer in the winter (think less humidity and buildings with cranked-up heat that dries out the skin), it's also important to moisturize regularly, drink lots of water, and invest in a humidifier to keep skin moisturized. Taking an omega-3 supplement daily is also a smart way to keep skin supple.

⁵ <http://www.skinmedica.com/beautytalk/sunscreen-in-the-winter-why-you-still-need-it>

Windburn can also wreak havoc on already-dry winter skin, as exposure to strong, cold winds can strip the skin of its natural oils and protective moisture barrier. Look for products that contain aloe or hyaluronic acid, which draws moisture to the skin to help restore the lipid barrier.

My best advice: When it comes to sun protection, treat every day like a sunny day. Think of sunscreen as a 365-day-a-year requirement. Your skin—and your health—will thank you.

Sunscreen Cost⁶

To best mimic how most people purchase their sunscreen, prices were obtained from local retail stores. The data was collected from five different widely prevalent retail store branches in the greater Sacramento area. For each store branch, three locations in Sacramento, Woodland, Davis, and Dixon were studied for a total of 12 stores in each branch. The sunscreens that we evaluated ranged from SPF of 30 to 100 and data was only collected on sunscreens that were labeled with SPF of exactly 30, 50, 70, or 100 to allow for comparisons. For each type of sunscreen, the size and price of the bottle were recorded. The data was used to calculate a normalized price that was reported as price per ounce.

Cost of Sunscreen Based on Sun Protection Factor

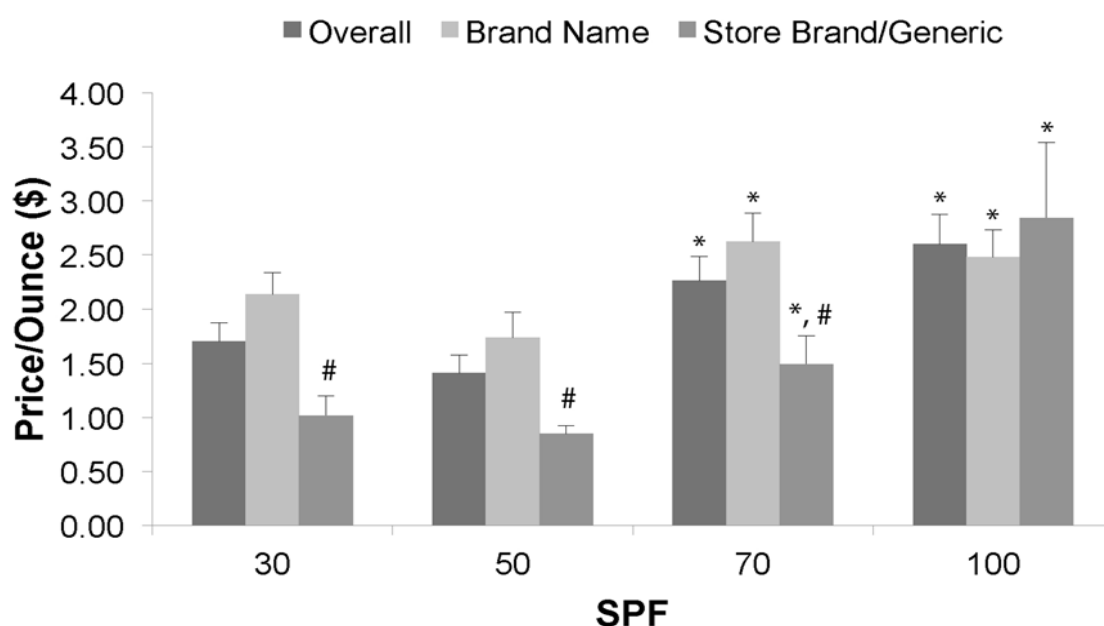


Figure 1. Prices of sunscreen. Sunscreen prices were stratified by SPF and by whether they were brand name or store brand sunscreens. Prices were normalized as dollars per ounce of sunscreen. * = $p < 0.05$ in comparison to the respective SPF 30 sunscreen estimate; # = $p < 0.05$ in comparison of store brand (generic) sunscreen with name brand sunscreen. N = 39, 41, 25, and 15 distinct sunscreens with averaged prices of pricing from at least six different stores for each particular sunscreen.

<https://escholarship.org/uc/item/6v0352fw.pdf>

⁶ The economic burden of sunscreen usage <https://escholarship.org/uc/item/6v0352fw.pdf>

Overall, the cost of sunscreens typically increased with SPF (Figure 1). SPF 30 sunscreen prices were not statistically different from SPF 50 sunscreens.

Store brand/generic sunscreens were considerably less expensive compared to name brand sunscreens. This relationship held true at SPF 30, 50, and 70. However at SPF 100, there was no statistical difference in the pricing of name brand and store brand/generic sunscreens.

Annual Economic Cost for Sunscreen Use

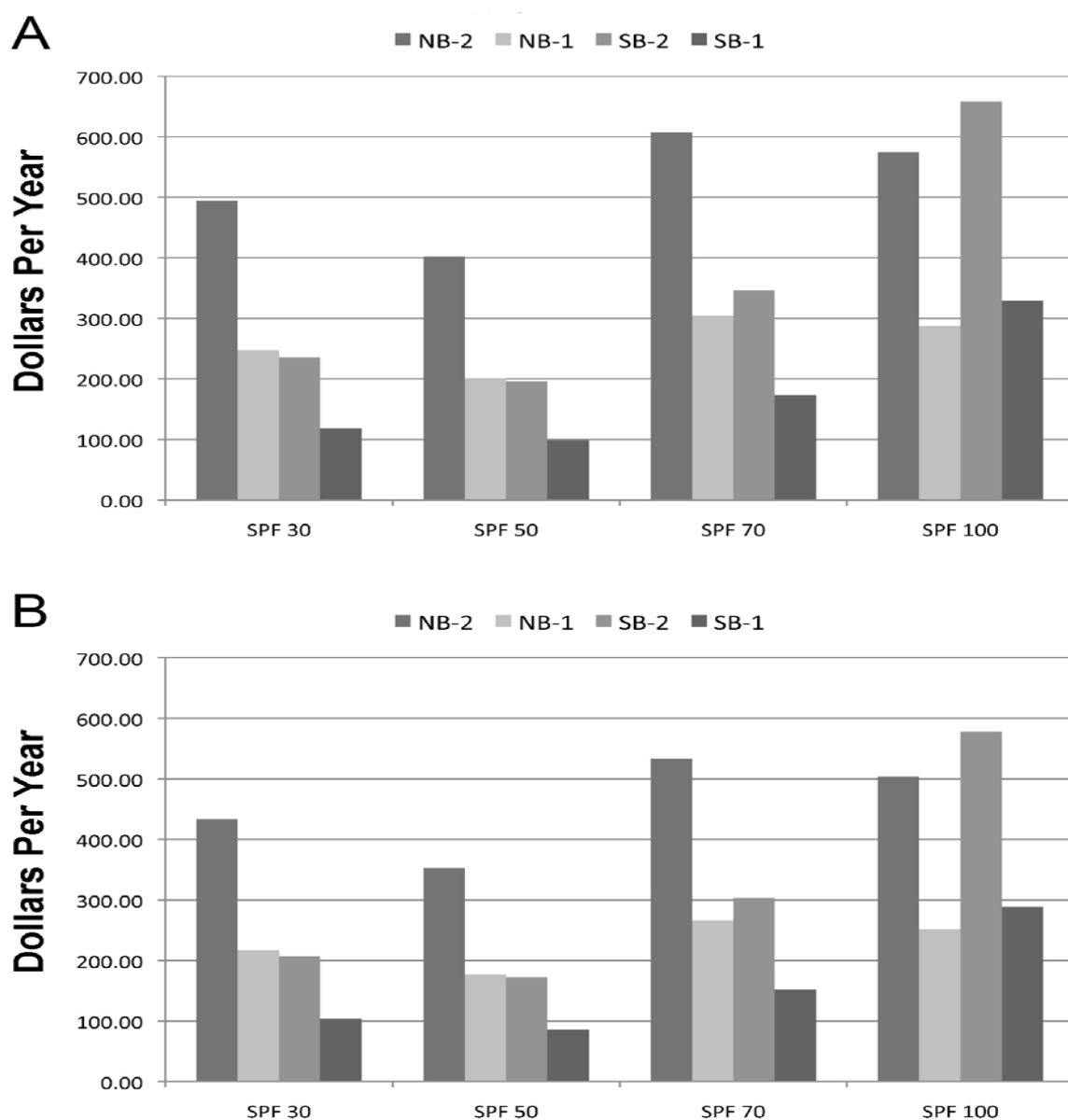


Figure 2: Annual Cost for Moderate Sunscreen Use. The yearly cost of applying sunscreens for an average adult man (A) and average adult woman (B): NB-2 = name brand sunscreen at 2 mg/cm², NB-1 = name brand sunscreen at 1 mg/cm², SB-2 = store brand/generic sunscreen at 2 mg/cm², SB-1 = store brand/generic sunscreen at 1 mg/cm².

<https://escholarship.org/uc/item/6v0352fw.pdf>

For the average man under ideal conditions (2 mg/cm²), the annual economic burden is depicted in Figure 2A. The economic burden of using SPF 50 sunscreens ranged from \$196.36 to \$402.61 depending on name brand or store brand use, respectively.

However, under actual use conditions (1 mg/cm²), this burden is halved and ranges from \$98.18 to \$201.30. For the average woman under ideal conditions (2 mg/cm²), the annual economic burden is depicted in Figure 2B. The economic burden of using SPF 50 sunscreens ranged from \$172.16 to \$352.99 depending on name brand versus store brand use, respectively. However, under actual use conditions (1 mg/cm²), this burden is halved and ranges from \$86.08 to \$176.49.

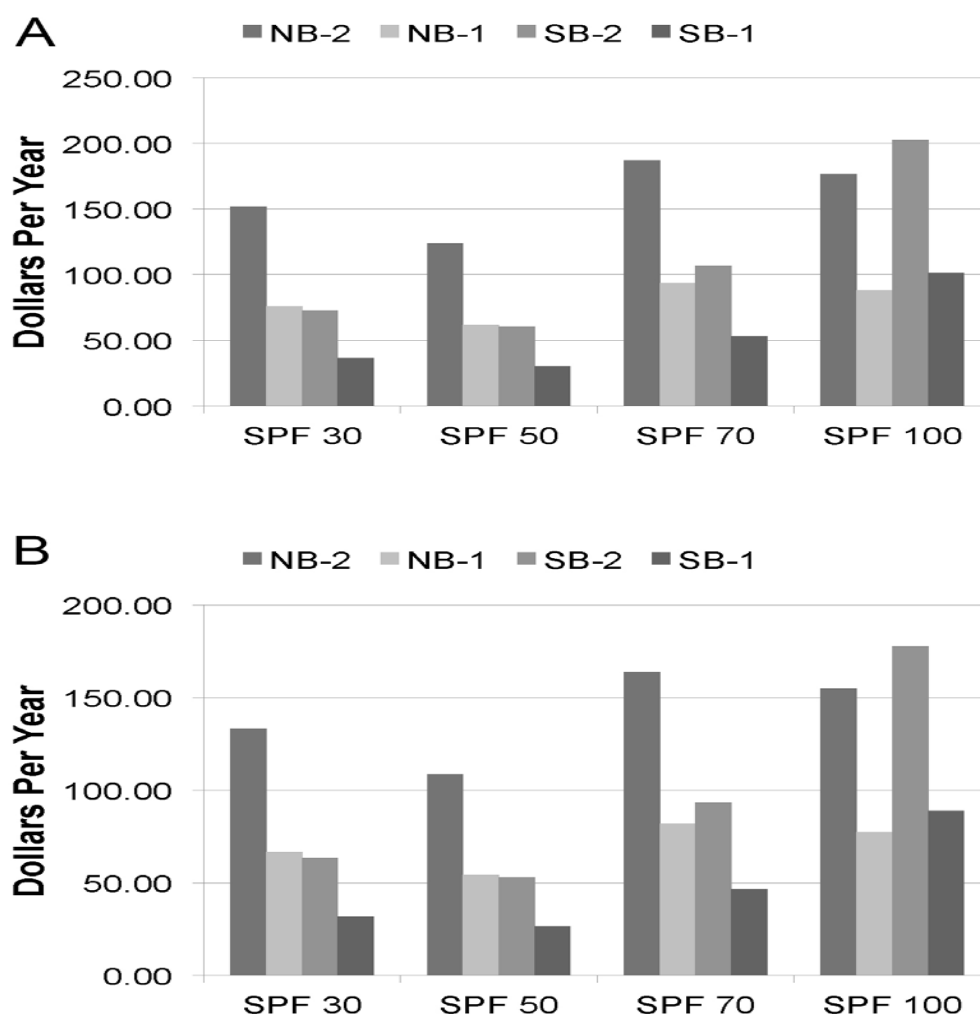


Figure 3. Annual Cost for Minimal Sunscreen Use. The yearly cost of applying sunscreens for an average adult man (A) and average adult woman (B). NB-2 = name brand sunscreen at 2 mg/cm², NB-1 = name brand sunscreen at 1 mg/cm², SB-2 = store brand/generic sunscreen at 2 mg/cm², SB-1 = store brand/generic sunscreen at 1 mg/cm²

<https://escholarship.org/uc/item/6v0352fw.pdf>

For the average man under ideal conditions (2 mg/cm²), the annual economic burden is depicted in Figure 3A. The economic burden of using SPF 50 sunscreens ranged from \$60.42 to \$123.88 depending on name brand vs store brand use, respectively. However, under actual use conditions (1 mg/cm²), this burden is halved and ranges from \$30.21 to \$61.94. For the average woman under ideal condition (2 mg/cm²), the annual economic burden is depicted in Figure 3B. The economic burden of using SPF 50 sunscreens ranged from \$52.97 to \$108.61 depending on name brand versus store brand use, respectively. However, under actual use conditions (1 mg/cm²), this burden is halved and ranges from \$26.49 to \$54.31.

In this study we collected our data from local retail stores to mimic how consumers typically purchase their sunscreens. Our estimates at an application density of 1 mg/cm² are likely to be more accurate than the estimates at 2 mg/cm². Our study reveals several interesting patterns.

Not surprisingly, store brand/generic sunscreens were found to be cheaper than name brand products. However it was surprising that the savings were between 40 to 50% in purchasing a store brand/generic sunscreen.

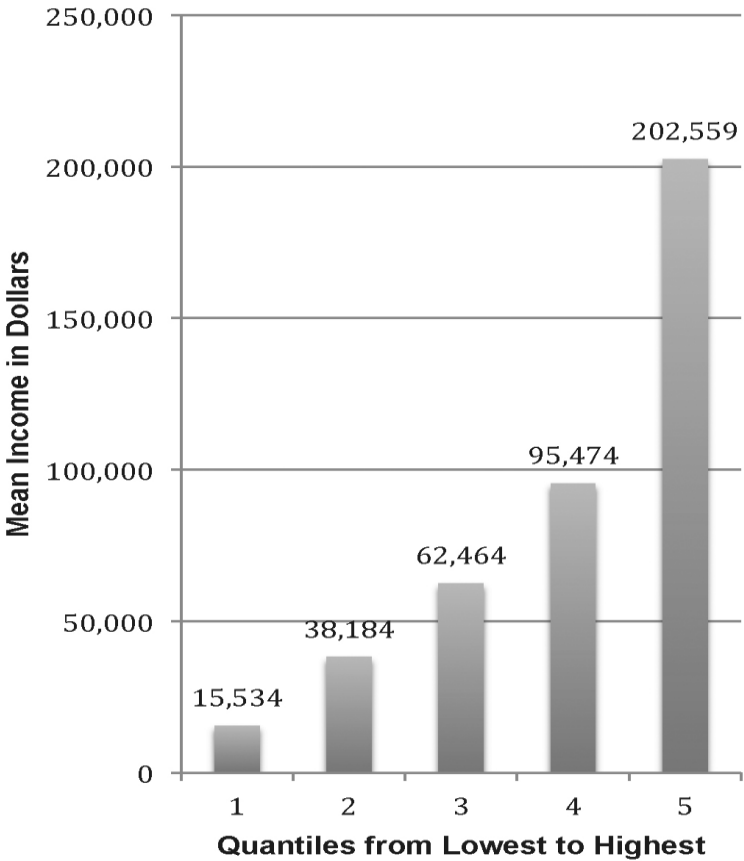


Figure 4. 2012 U.S. Mean household Income in Dollars Divided into Quantiles

<https://escholarship.org/uc/item/6v0352fw.pdf>

Table 1: Annual Cost of Sunscreen

	Man				Woman			
	Name Brand		Store Brand		Name Brand		Store Brand	
	Ideal Use (2 mg/cm ²)	Actual Use (1 mg/cm ²)	Ideal Use (2 mg/cm ²)	Actual Use (1 mg/cm ²)	Ideal Use (2 mg/cm ²)	Actual Use (1 mg/cm ²)	Ideal Use (2 mg/cm ²)	Actual Use (1 mg/cm ²)
SPF 30	\$494.21	\$247.10	\$235.96	\$117.98	\$433.30	\$216.65	\$206.88	\$103.44
SPF 50	\$402.61	\$201.30	\$196.36	\$98.18	\$352.99	\$176.49	\$172.16	\$86.08
SPF 70	\$607.64	\$303.82	\$346.27	\$173.13	\$532.76	\$266.38	\$303.59	\$151.80
SPF100	\$574.38	\$287.19	\$658.79	\$329.39	\$503.59	\$251.80	\$577.60	\$288.80

<https://escholarship.org/uc/item/6v0352fw.pdf>

The sunscreens became more expensive as SPF increased to 50, 70, and 100. What was surprising is that SPF 30 sunscreens were as expensive as SPF 50 sunscreens. This may reflect a greater demand for SPF 30 sunscreens that may be driven by current position statements from the American Academy of Dermatology, which recommends the use of at least SPF 30 sunscreens, among other recommendations. With the new labeling changes adopted by the Food and Drug Administration (FDA), sunscreen in the United States can only be labeled as 50+ and SPF 70 and SPF 100 labels will cease to exist. It will be interesting if this will ultimately drive up the cost of SPF 50+ sunscreens in comparison to SPF 40 sunscreens.

Our estimates for economic burden reveal that sunscreens are affordable. The median household income in the United States is \$51,371 in 2012. Therefore for a couple consisting of two male or female adults, the relative economical burden approximately ranges from .0012% to .0024% of their income under minimal application density depending on store brand or name brand use.

Figure 4 shows the average household income in quantiles. Patients without much reserve income should be encouraged to purchase generic sunscreens and at least use it to their face, forearm, hands, and neck, because the cost of this is less than \$40 per year.

The findings presented here are in agreement with the pricing found in a previous study of the economic burden of sunscreen. However, this study differs and complements the previous study in several ways. Firstly, this study focused on pricing in retail stores rather than online stores and may more closely mimic how sunscreens are purchased by the average consumer.

Secondly, the pricing presented in this study is stratified along SPF and store brand vs name brand. Finally, we estimate the economic burden under both 2 mg/cm² and 1 mg/cm². Interestingly, the yearly economic burden estimated here for name brand and store brand sunscreens are higher and lower, respectively, than the estimate provided in the previous study, further supporting the agreement between the two studies.

Our study has several limitations. All of our data collection was focused in the Sacramento, CA area and the prices may vary by state, region, and country. However, skin cancer rates are high in California and in Sacramento, CA with melanoma incidence rates of 17.6-21.0 per 100,000 people, which may be related to more frequent outdoor sun exposure and the fact that

there 188 sunny days per year, making this region suitable for estimating annual economic burden. Therefore, our estimates may be an overestimate, but is unlikely to be an underestimate of the economic burden. Secondly, our study does not take into account that SPF values greater than 50 will no longer be allowed. As mentioned before, this may change the pricing of SPF 50 sunscreens in the future.

Thirdly, our study was focused on the most popular brands that were available over the counter at local retail stores and we selected brands that had a store brand/generic alternative that is typically marketed right next to the brand name sunscreen on the shelves. This allowed for controlled pairing of the store brand/generic sunscreens to the name brands. However, our study does not include brands that would only be available through online purchases, at health food stores, or only over the counter in physician offices.

4 Reasons You're Paying Too Much for Sunscreen

Even though dermatologists say we should be slathering the stuff on all year long, summer is when many of us remember we should be using sunscreen. Increased awareness about the danger of [skin cancer](#) has made sunscreen a \$1.3 billion industry, according to market research company IBISWorld. But it's also made it easy to convince [consumers](#) to spend much more than necessary to protect themselves.

For sunscreen to be effective, experts say, it needs to be applied an ounce at a time and reapplied every two hours or after being in the water. In warm weather, that can mean a lot of sunscreen — but it doesn't have to mean a huge outlay of cash. Here are the reasons many consumers burn too quickly through their sunscreen budget.

They pick top brands. For its July issue, *Consumer Reports* magazine studied 12 mass-market sunscreen brands and found out that when it comes to SPF, price doesn't always equal quality. In fact, the house brands from Target (Up & Up) and Wal-Mart (Equate) topped its list, although they also were the two cheapest evaluated. They lived up to their stated SPF claims, held up to scrutiny when it came to their protection against UVA rays (SPF is just a measure of protection against UVB rays, even though both UVA and UVB rays damage skin) and survived 80 minutes underwater. The underachievers turned out to be the pricey potions: The last two contenders were among the most expensive sunscreens on the list.

They grab the highest SPF on the shelf. Sunscreens with SPF of greater than 50 aren't significantly more effective, but they are usually more expensive. Save your money: SPF 30 blocks 97% of UVB rays, while SPF 50 blocks 98%. Two years ago, the FDA laid out some new regulations pertaining to sunscreen labeling, but it dropped a proposal to cap SPF labeling at 50. Consumer advocacy groups blamed industry influence, noting that the FDA had previously come out against higher SPFs: "There is not sufficient data to show that products with SPF values higher than 50 provide greater protection for users," [the agency said](#) in 2011.

They pay extra for certification. As the *New York Times'* [health blog Well](#) points out, the Skin Cancer Foundation's seal of recommendation is actually a pay-for-play endorsement. "The Seal is a symbol of safe and effective sun protection," the Skin Cancer Foundation says on its website. But if you go looking a little further, it also says this: "Eligibility for the Seal program is a benefit of membership in our Corporate Council, which carries annual dues of \$10,000." This doesn't mean you should avoid sunscreens endorsed by the group, but don't be swayed into paying extra for them.

They don't buy it with pre-tax dollars. Though company benefit plans and insurance companies vary, many allow participants to use pretax FSA contributions to buy sunscreens labeled SPF 30 or higher. Check with your insurer to make sure your purchases qualify, and remember that lower SPF sunscreens and tanning oils don't count.

<http://business.time.com/2013/05/30/5-reasons-youre-paying-too-much-for-sunscreen/>

Assessing the Current Market of Sunscreen: A Cross-Sectional Study of Sunscreen Availability in Three Metropolitan Counties in the United States⁷

TABLE 1: Demographics of selected zip codes.

	Cook County		San Diego County		Miami-Dade County	
	60611	60622	92127	92025	33156	33189
Zip code	60611	60622	92127	92025	33156	33189
Median household income	\$85,583	\$64,037	\$117,016	\$45,998	\$94,399	\$51,677
Population	28,718	52,548	39,337	49,978	31,315	23,828
Median age	39.5	31.0	35.2	31.1	41.3	36.0
High school graduate or higher	99.5%	86.9%	96.6%	70.3%	93%	84%
Unemployed	6.7%	5.3%	5.4%	8.1%	5.4%	10.4%
Hispanic or Latino	4.9%	29.1%	9.5%	55.3%	47.9%	56.9%

www.hindawi.com/journals/jsc/2014/285357/

TABLE 2: Melanoma incidence and demographic information of Miami-Dade, Cook, and San Diego Counties.

County	Melanoma incidence	Median household income ²²	High school degree or higher in 25+ year olds ²²	% White non-Hispanic ²²
	2006–2010	2007–2011	2007–2011	2012
Miami-Dade	8.7 per 100,000	\$43,957	77.6%	16.3%
Cook	12.6 per 100,000	\$54,598	83.7%	43.4%
San Diego	26.9 per 100,000	\$63,857	85.3%	47.6%

www.hindawi.com/journals/jsc/2014/285357/

⁷ www.hindawi.com/journals/jsc/2014/285357/



FIGURE 1: Selected zip codes in (a) Cook County, (b) Miami-Dade County, and (c) San Diego County.

www.hindawi.com/journals/jsc/2014/285357/

TABLE 3: Makeup of the sampled sunscreen isles with comparisons between the price per ounce, corrected for SPF, of physical versus chemical sunscreens and spray versus lotion sunscreens.

Sunscreens sampled $n = 1,660$	
% Tanning oils	11.0%
% SPF < 15	14.9%
% SPF > 15	65.4%
% Physical sunscreens	3.4%
	Price per ounce · SPF physical = \$0.10
	Price per ounce · SPF chemical = \$0.07
	$P < 0.01$
% Spray sunscreens	46.2%
	Price per ounce · SPF lotion = \$0.08
	Price per ounce · SPF spray = \$0.03
	$P < 0.01$
Mean price per Oz.	\$2.10
Mean corrected SPF	34.3

www.hindawi.com/journals/jsc/2014/285357/

TABLE 4: Available sun products by zip code with comparisons between high and low income zip codes. "High income" zip codes represent the aggregates 92127, 33156, and 60611. "Low income" zip codes represent the aggregates 92025, 33189, and 60622.

	Zip code	Number of sunscreens sampled	Tanning oils %	SPF < 15%	SPF > 15%	Physical sunscreen %	Price per ounce	Spray %	Mean corrected SPF
Region	High income	552	16.3%	19.7%	59.6%	3.9%	1.97	40.3	30.8
	Lower income	1108	8.3%	12.2%	68.3%	3.1%	2.17	49.2	36.1
	<i>P</i> value		<i>P</i> < 0.01	<i>P</i> < 0.01	<i>P</i> < 0.01	<i>P</i> = 0.40	<i>P</i> = 0.03	<i>P</i> < 0.01	<i>P</i> < 0.01
San Diego County	92127	171	10.5%	20.5%	43.9%	4.6%	\$2.12	40.5%	33.4
	92025	475	3.6%	15.4%	55.4%	3.3%	\$2.25	48.7%	37.6
	<i>P</i> value		<i>P</i> < 0.01	<i>P</i> = 0.15	<i>P</i> = 0.01	<i>P</i> = 0.62	<i>P</i> = 0.03	<i>P</i> = 0.10	<i>P</i> < 0.01
Miami-Dade County	33156	259	23.9%	25.1%	59.5%	0.5%	\$1.87	39.6%	26.3
	33189	404	15.1%	11.9%	71.8%	0.6%	\$1.94	55.1%	32.6
	<i>P</i> value		<i>P</i> < 0.01	<i>P</i> < 0.01	<i>P</i> < 0.01	<i>P</i> = 0.70*	<i>P</i> = 0.01	<i>P</i> < 0.01	<i>P</i> < 0.01
Cook County	60611	122	8.2%	7.4%	82.0%	8.9%	\$2.03	41.1%	36.6
	60622	229	6.1%	6.1%	89.1%	6.5%	\$2.19	40.9%	39.3
	<i>P</i> value		<i>P</i> = 0.61	<i>P</i> = 0.82	<i>P</i> = 0.90	<i>P</i> = 0.53	<i>P</i> = 0.18	<i>P</i> = 0.92	<i>P</i> = 0.10

*Fischer-exact test used in place of χ^2 .

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More details: www.hindawi.com/journals/jsc/2014/285357/

Consumer Reports Rates Best Sunscreen Buys⁸

May 25, 2012 -- With any luck, the Memorial Day weekend will bring weather good enough to be slathering on the sunscreen at least every two hours when outdoors.

And to know which are the best products to put on your skin during the unofficial start of summer, the May issue of *Consumer Reports* rated 18 top-selling sunscreens. The products ranged from SPF 30 to SPF 75+ and were lotions, sprays, or a spray foam. They varied in price from a low of \$.59 an ounce to a high of \$20.59 per ounce.

To judge the performance of each product, sunscreens were tested on people, and the ultraviolet B (UVB) radiation protection was rated before and after swimming in fresh water for up to 80 minutes. Testers also checked whether the product stained clothing.

In addition, they did a new "critical wavelength" test required by the FDA to see if the sunscreen truly offered broad-spectrum UVA and UVB protection. UVB radiation is the main cause of sunburn, while UVA rays penetrate deeper, where they can cause long-term damage and age skin.

Top 7 Sunscreens

Most products offered good UVB protection, while many helped block UVA rays.

The cheapest sunscreen outscored the most expensive product in the test, leading researchers to conclude that "price had nothing to do with performance."

After testing, *Consumer Reports* named three of its highest-rated sunscreens as "Best Buys," while four other top-scoring products were "Recommended."

⁸ <http://www.webmd.com/beauty/sun/20120525/consumer-reports-best-sunscreen-buys>

Best Buys

- No-Ad lotion with aloe & vitamin E, SPF 45, \$.59/ounce
- Walgreens continuous spray sport, SPF 50, \$1.30/ounce
- Coppertone oil-free foaming spray, SPF 75+, \$1.67/ounce

Recommended

- All Terrain Aqua Sport lotion, SPF 30, \$4/ounce
- Banana Boat clear ultra-mist sports performance active dry protect spray, SPF 30, \$1.63/ounce
- Coppertone sport high performance ultra sweat-proof spray, SPF 30, \$1.67/ounce
- Eco all natural sunscreen body lotion, SPF 30, \$4.72/ounce
- Two sunscreens flunked the "broad spectrum" test:
- Alba Botanical natural very emollient sunblock sport, SPF 45
- Banana Boat Kids tear-free, sting-free, SPF 50+

No matter which product you put on, *Consumer Reports* offered these tips to help stay safe in the sun:

- Choose a waterproof sunscreen with at least an SPF of 30. Above 30 provided little extra protection.
- Use 2 to 3 tablespoons of sunscreen; reapply every two hours and after swimming or sweating.
- Wear a hat and protective clothing in addition to using sunscreen.

The FDA is looking into possible risks of inhaling spray sunscreens. *Consumer Reports* recommends avoiding using sprays on kids. If used, spray on hands first before applying to the face. The group also recommends that pregnant women may want to avoid products with retinyl palmitate.

Read labels and ingredients carefully. New FDA requirements for sunscreens and other cosmetic products containing an SPF value will soon make it easier for consumers to understand the labels and what claims, such as "broad spectrum" or "water-resistance," really mean.

Which Sunscreen Is Best?⁹

No perfect sunscreen exists. "The best sunscreen is the sunscreen you like well enough that you'll use it regularly," says John E. Wolf, Jr., MD, MA and Professor and Chairman of the Department of Dermatology at the Baylor College of Medicine in Houston.

While UVB rays affect skin primarily between 10am and 2-4 pm, UVA rays (which can penetrate skin more deeply and cause it to age it without you feeling its effects) work on your skin during all daylight hours. Accordingly, Dr. Wolf tells REI that he applies a broad-spectrum SPF 30 (or higher) sunscreen to his exposed skin daily.

"A sunburn is the first acute thing you're trying to prevent, then aging of the skin, then pre-cancers and skin cancers," Dr. Wolf says. "The areas where we see the worst results of pre-aging and pre-cancers are the head, neck and the back of the hands. I recommend putting sunscreen on every day."

⁹ <http://www.rei.com/learn/expert-advice/sunscreen.html>

Non-greasy vs non-drying natural sunscreen¹⁰

When formulating a natural sunscreen with zinc, there's a really fine line between formulating the product to be ultra-hydrating vs a dryer formula that's super quick and easy to apply. At Shop Naturally, we know our products so well, especially in this category, that we can make sure you get the right mineral sunscreen for your skin type and your needs – ie: beach vs every day use.

We get two common questions when people are shopping for natural and organic sunscreen in our store.

1) I don't want my skin drying out, which brand should I pick?

and -

2) I don't want a natural sunscreen that's too oily, which brand should I pick?

Our three biggest sellers are the Eco Sunscreen range, the new Eco Tan Coconut Sunscreen and the Wotnot Sunscreen. Here's a run down on the consistency of each and what skin type and usage type we think they're best suited to.

Wotnot Sunscreen consistency

This is the most nourishing / oily consistency of the three. We have customers who just LOVE this and won't use anything else. It doesn't make you look white and pasty when you apply, but it is oilier than the others. If you have really dry skin and you're outdoors and at the beach a lot, this sunscreen is your pick. Mum's love it for their kids and beach goers love it too. If you're wearing sunscreen all day but you're not in bathers and swimming, there's a reasonable chance you may find it just a little too heavy for your needs. By all means, give it a try, but it may end up in your beach bag.

Eco Sunscreen consistency

At the other end of the spectrum is the Eco Sunscreen brand. They have a body sunscreen, a face sunscreen and a baby sunscreen. All three are really easy to apply but they are white and can leave you looking just a little bit pasty. If you're at the beach and swimming and out in the sun, it's a small price to pay for the coverage. If you have dry skin and you wear this every day, there's a chance your skin may start to feel a little dry. A quick coat of coconut oil in the shower at the end of the day will ease this and is a budget friendly way to rehydrate your skin. Your favourite moisturiser will do the trick too, but the oil in the shower is quicker. If you do find your skin dries too easily, take a look at the Wotnot or the Eco Tan. The Eco Sunscreen Face is a lot more moisturising than the body version, and if you can afford it, use it over your whole body, otherwise, it's a great product to use for your face. Just pop a little powder foundation over the top if you're at all concerned about looking pasty and you're set. Mineral foundation usually has some SPF protection in it too. Jump over to our natural and organic makeup section for a selection of mineral powders. You can even mix it with the sunscreen before you apply if you want to. A light dusting over the top with a kabuki brush works just as well as mixing it and is a lot easier to do.

Eco Tan Sunscreen consistency

The new Eco Tan Coconut Sunscreen sits somewhere in the middle of both of these and is new to the market for the Summer 2014/2105 season. I suspect it's going to end up our top seller. Why? It seems to be the perfect balance between the Wotnot and the Eco Sunscreen. It

¹⁰ <http://www.shopnaturally.com.au/healthy-households/non-greasy-non-drying-natural-sunscreen/>

does have a really strong coconut smell, so this can be mildly off putting for those who are wearing it without swimming, or if the smell of coconut makes you hungry! In all seriousness though, it's quite hydrating without being too oily. It doesn't rub in and vanish quite as much as the Eco Sunscreen does, but it comes close. It is water resistant, so it does need to leave a bit of a coating on the skin to perform that trick. Unlike the Eco Sunscreen which can leave you looking a little pasty, this one is skin toned. It's not tinted enough to give you a tinted tanned look, just enough so it doesn't look white when applied to the skin. It's suitable for the body and the face, but for an every day face sunscreen is not quite as moisturising as the dedicated Face Sunscreen from Eco Sunscreen but it comes really really close.

Consistency out of the tube

There is one thing I need to mention about all of these sunscreens, and that's the fact that they can separate a little in the tube, especially in really hot weather. This happens more so with the Wotnot and the Eco Tan Sunscreen than the Eco Sunscreen, but it's worth noting and to be prepared. We recommend you squeeze the tube for a few seconds to mix up anything that may have separated before you apply, otherwise, you can get a little bit of oily liquid come out of the tube first and you don't want to lose the oil that gives the lotion its moisture and nourishment. This is perfectly normal and happens because of the natural formulation. We hope you have found our comparison useful.

Why You Should Only Use All Natural Sunscreen

People are becoming more aware of what they are putting on their skin and because of this awareness the use of natural products are becoming more popular. This is also the case when it comes to sunscreens. Many people opt for natural sunscreens because they do not contain harmful chemicals. They have also been proven to reduce the effects of sun damage, preserve the skin keeping us looking younger, and helping in the fight against skin conditions and disease. There are countless reasons why you should consider making the change to natural sunscreens, read on to discover just how much better they are for you.

Natural sunscreens contain the beneficial minerals titanium and zinc, these minerals act as a barrier blocking UV rays. Whereas chemical sunscreens actually absorb these rays and then neutralize once in the skin.

Natural sunscreens do not require re-application as they sit on top of the skin rather than being absorbed. However chemical sunscreens utilize chemical ingredients which need to be reapplied because these ingredients become dormant.

Natural sunscreens contain less allergenic ingredients and therefore cause less irritation. Because of the toxic ingredients in chemical sunscreens irritation to the skin is more likely.

Natural sunscreens help to protect the skin while soothing and nourishing at the same time whereas the pores of the skin are prone to clogging with the use of chemical sunscreens.

The natural minerals found in natural sunscreens contain beneficial properties which ultimately preserve and protect the skin. The UV ray blocking agent titanium acts as a shield without being absorbed into the skin. Zinc contains healing, anti viral, anti-bacterial, and anti-inflammatory properties providing overall protection for all skin types including acne-prone and sensitive skin.

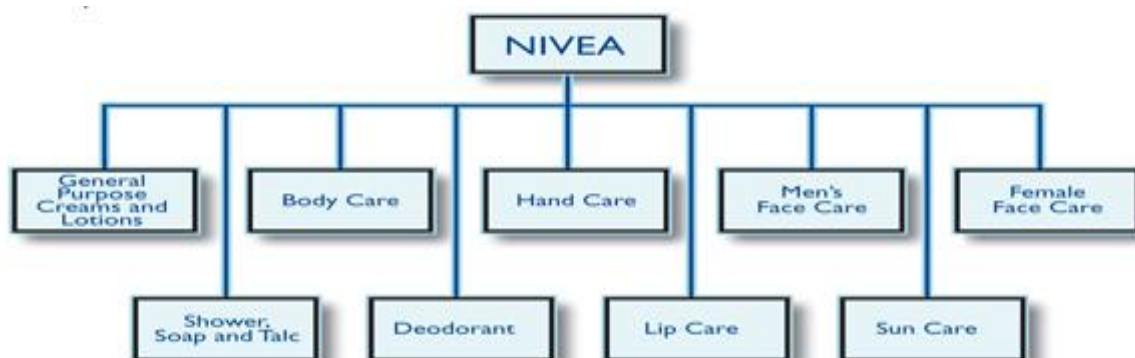
Chemical sunscreens contain many harmful ingredients which put our bodies at risk making them susceptible to permanent damage. The UV neutralising agents can ultimately become carcinogenic and therefore increase the risk of developing cancer as well as altering hormone levels by disrupting the endocrine system.

There are a wide variety of natural sunscreens available which contain varying ingredients and natural beneficial products. Look out for the following natural ingredients:

- Avocado oil helps to protect and soothe the skin
- Sesame oil features a high UV ray resistance of 30%
- Cocoa butter keeps the skin from drying out while keeping it moisturised and soft
- Vitamin E prevents sun damage while fighting off free radicals
- Aloe Vera features soothing and healing qualities as well as promoting the growth of new cells by stimulating the skin
- Tea tree oil acts as an antiseptic germicide providing damaged skin with essential nutrients and stimulating blood flow to the capillaries
- Green tea and grape seed oil are rich in antioxidants which help to protect skin cells
- Tocopheryl acetate is a source of vitamin E and is a natural alternative to harmful parabens. Parabens are preservatives which have been associated with breast cancer, skin allergies, and irritations.

A NIVEA case study¹¹

Beiersdorf is the international skin care company behind the leading brands NIVEA, ELASTOPLAST, ATRIXO and EUCERIN. Over the past 10 years the company has grown rapidly in the UK by developing a balanced and well managed **portfolio** of brands. A brand portfolio should consist of a range of products which support each other, irrespective of which categories they operate in.



The NIVEA range includes product types ranging from female face and body products to men's shaving gels, through to deodorants and sun care products.

NIVEA identifies market **segments** that meet individual consumer needs. Segmentation occurs when a market is split into sub-markets (segments) which can respond in similar ways to different marketing activities. Each segment:

- contains consumers with similar needs or tastes
- is best satisfied by products targeted to meet their specific needs.

¹¹ <http://businesscasestudies.co.uk/nivea/segmentation/conclusion.html#axzz3J7cc6kya>



This can be at a macro level (e.g. total health and beauty market) and at a micro level (i.e. within a specific category). NIVEA Sun is a major international sun care brand, recognised worldwide as a leader in sun care research and development. The UK market is worth £173.6m with an overall category **purchase penetration** of 33% (**usage penetration** is higher).

Protection	Moisturising Sun Lotions SPF4, 8, 12, 15, 20, 30, 40, 50+	Moisturising Sun Sprays SPF6, 10, 15, 20, 30, 50+	Firming Sun Lotion SPF6, 15 Satin Sheen Sun Lotion SPF8, 15 Sun Oil SPF4	Sensitive Sun Lotion SPF30, 50+	Pampering Protection Mousse SPF 8, 15	Children's Sun Lotion SPF25, 40, 50+ Sun Spray SPF20, 30, 40, 50+ Baby Sun Lotion SPF50+
After Sun	Moisturising After Sun Lotion 200/400ml	Cooling After Sun Spray	After Sun Tan Prolonger	Regenerating After Sun Balm		
Self Tan	Sun Touch Lotion Normal to Dark or Fair Skin	Sun Touch Caring Spray	Sun Touch Face Cream Normal to Dark or Fair Skin	Sun Touch Aerosol Spray Normal to Dark or Fair Skin	Sun Touch Wipes	

Sun care is a serious issue for all and the protection message is key to the NIVEA Sun brand proposition. NIVEA Sun appeals to, and is used by men, women and children with quality products to meet all needs. The brand also aims to bring fun to the market through recognising situations when sun care products are applied.

The three main product segments

Skin Type	Moderate Temperature	Hot Temperature	Very Hot Temperature
Very Light	SPF 30	SPF 40	SPF 50+
Fair	SPF 20	SPF 30	SPF 40
Normal	SPF 15	SPF 20	SPF 30
Dark	SPF 15	SPF 15	SPF 30
Children's	SPF 30	SPF 50+	SPF 50+

The diagram above shows the three main product segments that make up the NIVEA Sun range. As you will see, there are a variety of products in each, which can also be segmented as shown.

1. Protection

It is vital that skin is adequately protected against the sun's harmful effects (although no sunscreen can provide total protection). NIVEA Sun provides products that enable people to be as safe as possible. NIVEA Sun also encourages the use of other forms of protection (e.g. wearing a sun hat and avoiding midday sun). Protection is the largest segment in the sun care market with a purchase penetration of 28%. NIVEA Sun is the protection segment market leader by value (i.e. more money is spent on NIVEA Sun protection products than any other sun care brand in the UK).

- skin type

The chart below shows segmentation by skin type. The level of protection required for each segment will vary according to generalised skin types (as seen below):

Skin Type	Very Light	Fair	Normal	Dark
Hair Colour	Reddish	Blonde	Dark Blonde	Brown
Freckles	Many	Some	Few	None
Sunburn	Very Quickly	Quickly	Regular	Slow
Tanning	Slowly	Slowly	Quickly	Very Quickly

Skin type applies to children, as well as adults. Children's skin is thinner and its repair mechanism is not yet fully developed. As a result they require extra protection and sun screens that are specifically developed for their skin.

- location

NIVEA Sun provides a range of lotions and sprays targeted at different climates and to users with different skin types. Someone with fair skin may be well protected with a SPF 20 product when in England, but if they were in Barbados they would need SPF 40.

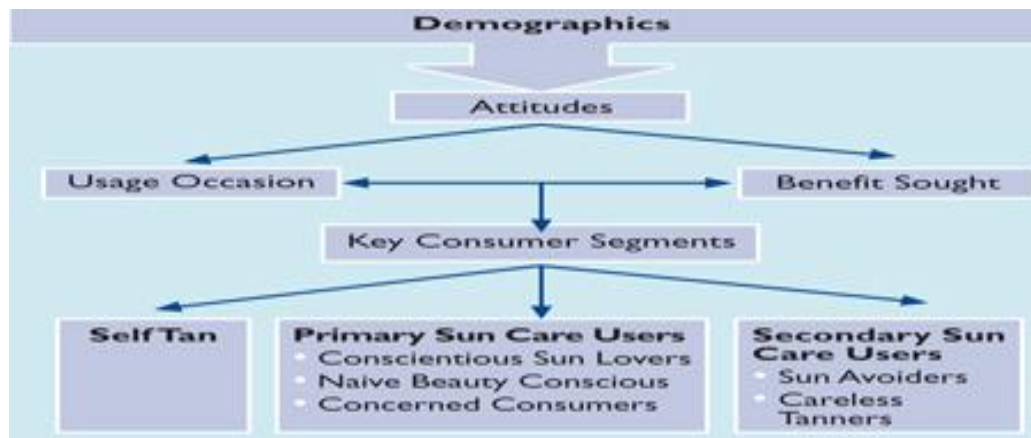
2. After Sun

NIVEA Sun is the market leader within this segment in the UK, which has been growing rapidly.

3. Self-tan

In contrast to protection and after sun, the self-tan category is concerned mostly with cosmetic appeal. Many adults use self-tan to have an all year round sun kissed glow.

Consumer segmentation



Segmentation has been vital to the success of NIVEA Sun and allowed the brand portfolio to grow to over 40 products, all meeting clear consumer needs. The following factors are used to develop and define the sun care segments:

Demographics - different groups of consumers behave differently (factors relate to age, gender, etc). **Demographic** differences relevant to NIVEA Sun include different buying behaviours between men/women and adults with children. There is a stark contrast between awareness and usage of sun care products between men (who prefer convenience) and women (who enjoy more luxurious sun care products). Similarly, adults with children are another broad segment with differing needs.

Demographic segments are broad. As research shows, the level of awareness of sun care transcends income and social class.

Attitudinal this is the most important segmentation variable. Consumers' attitudes towards sun care influences their purchases. NIVEA Sun conducts market research to understand user attitudes. This involves questionnaires using a nationally representative sample, and more intensive research with small groups, to discuss individual skin protection habits and preferences. This has identified 5 distinct groups for protection and after sun:

- Concerned Consumers 'a good tan is not important'. These consumers are conscious of the harmful effects of the sun and purchase sun protection products that are most likely to offer high sun protection factors
- Sun Avoiders - avoid sunbathing and using sun protection when in the sun - it is seen as a chore. These are unlikely to purchase a sun care product. Through education, this segment may be convinced to protect using more easy-to apply products such as sprays.
- Conscientious Sun Lovers - adore sunshine and like to use a trustworthy brand with suitable protection factors. They know about sun care and use this knowledge to purchase suitable products for their skin.
- Careless Tanners - adore the sun but don't protect against harmful dangers. Tanning is important to this group, not protection. They don't worry about the long-term damage to their skin and may purchase a low SPF product, if any at all.
- Naive Beauty Conscious - like to have a good sun tan. They recognise that sun protection is important but fail to understand about Sun Protection Factors (SPFs). These consumers may still be interested in the core features of a sun protection

product (e.g. SPF) and be more inclined to purchase an added-value offering such as a mousse.

Consumer segments were identified by analysing answers to questions about attitudes.

The two main aspects of attitudes relate to:

- Usage occasion (when) e.g. holiday, outdoor sports, gardening, working etc. This relates to the Sun Protection Factor (SPF) required, e.g. the SPF required for a holiday in Egypt differs greatly to outdoor work in the UK. This is one of the reasons why NIVEA Sun produce a wide range of sun protection from SPF 4 to 50 . Research has shown that consumers often purchase a variety of SPF's for differing needs and occasions. This factor alone however is not an accurate means of segmenting markets.
- Benefit sought - protection is the primary benefit but the preference by which this is delivered will vary by segment, e.g. convenience is important to men (so they choose spray applicators). Parents want to provide maximum protection for children (high SPFs and coloured products are therefore important).

The benefit sought differs across the attitudinal segments. Whilst 'Concerned Consumers' want a very functional product providing 'adequate protection' (e.g. SPF 30), 'Naive Beauty Conscious' may want a more luxurious sun protection product (e.g. mousse). This also applies to consumers with special skin types, who require a more specialised product. Recognising that this is a separate segment, NIVEA Sun has formulated sensitive skin products.

Segmentation is the tool that enables NIVEA Sun to identify different groups of customers, and provide the best possible products to meet individual requirements. The sun care market consists of different consumers with differing needs. The UK has the biggest sales of NIVEA Sun across Beiersdorf within Europe. Understanding segmentation enables NIVEA Sun to maintain a Number 1 value position in protection and after sun in the UK.

Sun-Protective Behavior Rates¹²

National surveys supported by CDC indicate that U.S. youth and adults are being exposed to ultraviolet (UV) radiation and can do more to protect themselves. More than one-third of the U.S. population reported a sunburn in the previous year, with rates higher among men and the non-Hispanic white population.

Adults

- In 2008, only 58% of adults said they usually practice at least one of the three sun-protective behaviors (use sunscreen, wear sun-protective clothing, or seek shade).²
- 32% reported usually applying sunscreen (30% applied sunscreen with an SPF of 15 or higher).
- 41% reported usually wearing some type of fully sun-protective clothing.
- 32% usually sought shade.
- Only 45% of young adults aged 18–24 used one or more sun protective methods, while 60% of those 25 years of age and older reported using one or more methods. Among men 18 and older, only 48% reported usually using one or more methods of sun protection, in contrast to 68% of women 18 and older.

¹² <http://www.cdc.gov/cancer/skin/statistics/behavior.htm>

Teens

- Among high school students, when they were outside for more than an hour on a sunny day, 14.4% of girls and 7.3% of boys reported they routinely used a sunscreen with an SPF of 15 or higher.
- More than 13% of high school students said they had used an indoor tanning device one or more times in the past year. Indoor tanning device use was higher among female students (21%) than male students (6%).
- About one-third of U.S. teens aged 14–17 years had a sunburn during the past year. About half of non-Hispanic white teens, 22% of Hispanic teens, 18% of non-Hispanic Asian teens, and 7% of non-Hispanic black teens had a sunburn during the past year.

Sources:

- The economic burden of sunscreen usage
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- Assessing the Current Market of Sunscreen: A Cross-Sectional Study of Sunscreen Availability in Three Metropolitan Counties in the United States
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- <http://businesscasestudies.co.uk/nivea/segmentation/conclusion.html#axzz3J7cc6kya>
- <http://www.skinmedica.com/beautytalk/sunscreen-in-the-winter-why-you-still-need-it>

Appendix: Sunscreen Use: Surprising Statistics

YONKERS, NY - Thirty-one percent of Americans polled by the Consumer Reports National Research Center said they never wear sunscreen. But consumers aren't oblivious to the sun's risks: 22 percent of those polled said they'd been examined by a doctor for something they thought might be skin cancer. The July issue of Consumer Reports rates ten top selling sunscreens to slather on, noting that there's plenty of variation among the brands tested. Consumers should choose carefully. The report will be available online at www.ConsumerReportsHealth.org.

45 percent of sunscreen users said they were "especially bothered" by getting sunscreen in their eyes

41 percent were bothered by sand sticking to their skin.

Another issue was cost, which 40 percent of respondents cited as bothersome.

About one third of respondents were bothered by stains and smells that wouldn't wash out and not being able to wash sunscreen off their hands.

"But with the official launch of summer [upon us] consumers should make sure they don't forget sunscreen. There are plenty of options-creams, lotions, different scents-to suit every preference,"said Jamie Hirsh, associate editor, Consumer Reports. Forty-eight percent of sunscreen users who'd had a sunburn in the past two years said it happened during their first time out in the sun after months of little to no sun.

Other Survey Highlights

While the likelihood that both men and women wearing sunscreen seems to increase the longer they plan to be in the sun, women are significantly more likely to be frequent sunscreen users. When planning to spend 2 to 4 hours in the sun, 48 percent of women versus 27 percent of men are likely to wear sunscreen.

Twenty-seven percent of parents with kids under twelve years old say they never or only sometimes apply sunscreen on their kids when they're outside for 2 to 4 hours. And 14 percent say they don't even apply sunscreen on their kids when they're outside for more than four hours.

Only one-third of sunscreen users are brand-loyal when it comes to sunscreens. Thirty-three percent like a particular brand and tend to stick with it, while 62 percent say they use "whatever they have."

Twenty-two percent of respondents say they've been examined by a doctor for something they thought might be skin cancer. And 14 percent said they'd been told by a doctor they were at risk of skin cancer.

Best Sunscreens, Plus Tips for Sunscreen Use

Consumer Reports assessed each sunscreen's ability to protect against ultraviolet A and ultraviolet B radiation. Many products now claim protection against both, though SPF accounts for ultraviolet B rays only. CR's tests also measured the sunscreens' protection after volunteers soaked in a tub for at least 40 minutes.

Consumer Reports found that most sunscreens protected well, identifying three Consumer Reports Best Buys: Walgreens Continuous Spray Sport SPF 50; Coppertone Water Babies SPF 50 (lotion); and Target Sport Continuous Spray SPF 30, whose brand name has since changed to Up & Up. Consumer Reports notes that spray sunscreens can be tricky to apply if it's windy.

Consumer Reports recommends the following tips for sunscreen use:

Consumers should pay attention to the expiration dates on their sunscreens. If their sunscreen lists no expiration date, they should write the purchase date on the bottle with a marker. Discard a sunscreen that's more than two years old.

Apply sunscreen at least 15 to 30 minutes before going outside to allow for absorption.

Don't rely on sunscreen alone to protect your skin. Wear tightly woven clothing and a broad-brimmed hat, limit sun time, and seek shade during the hottest hours of the day.

Don't make purchases based on brand alone. Past tests have shown that different formulas or SPF's within the same brand may not rate the same.

Look to Consumer Reports' sunscreen Ratings for excellent or very good choices. High-rated products from Consumer Reports' 2007 tests that are still available include Blue Lizard Regular Australian SPF 30+, Mustela Bébé/Enfant High Protection SPF 50, Lancôme Paris Sôlail Ultra Expert Sun Care for Sensitive Skin SPF 50, and Fallene Cotz SPF 58. These sunscreens are more expensive on average than the current batch, which includes only drugstore-available brands.

Concerns About Ingredient Safety

Consumer Reports notes that nanoparticles, manufactured microscopic materials that might behave differently from regular-sized particles, are sometimes used in sunscreens. Scientific studies have raised concerns about the adverse potential effects of nanoscale ingredients in sunscreens and other products on human health.

In sunscreens, zinc oxide and titanium dioxide, both mineral-based, are often used nano-sized, in part to make them look clearer on the skin. Manufacturers aren't required to disclose the use of nanoparticles, but if a sunscreen ingredient label mentions either of those minerals, it could mean the presence of nanoparticles. More information about nanotechnology can be found at www.ConsumerReportsHealth.org.

Poll Methodology

The Consumer Reports National Research Center conducted a telephone survey of a nationally representative probability sample of telephone households. A total of 1,000 interviews were completed among adults ages 18+ and interviewing took place April 9th to April 13th, 2009. The margin of error is +/-3 % points.

Source: Consumer Reports

<http://www.momsteam.com/health-safety/consumer-reports-poll-27-parents-kids-under-12-apply-sunscreen-rarely-never#ixzz3J95lqhNj>