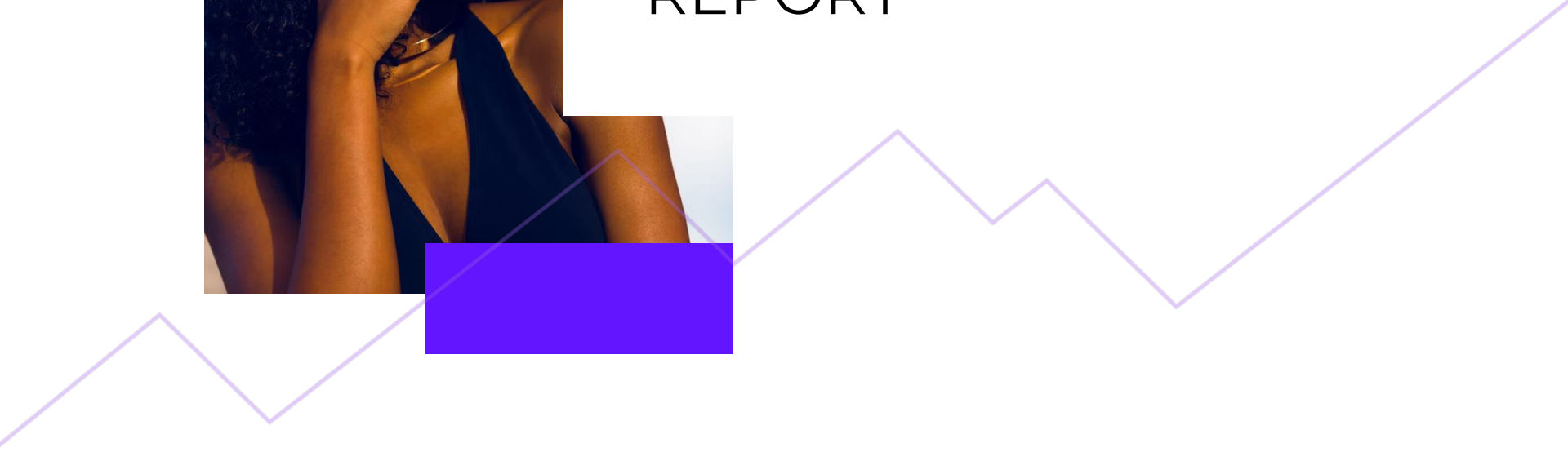
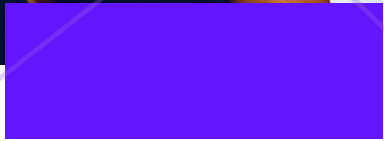


SPATE

APRIL 2022

SUN CARE TRENDS REPORT



SUN-STOPPABLE

With winter behind us, we have spring to look forward to with the promise of better weather awaiting us. As consumers shed their layers and seek out the sunshine, an increased need for sun protection and tanning alternatives arises. The sun care category keeps evolving as the knowledge-hungry, ingredient-driven skincare consumer asks for more from their SPF. Today's sun care consumer craves "super" products with multiple benefits and various formats catered to specific use cases.

This report dives into the sun care space and focuses on the top products and brands to follow across the sunscreen and tanning categories. Consider applying the insights from this presentation to your brand's strategies as we approach the warmer months ahead.

Have questions? Sign up for a [free trial](#) to get your questions answered.

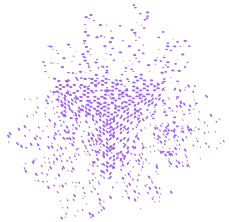
Thank you,

Olivier and Yarden, co-founders of Spate

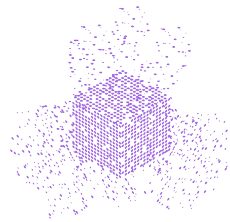
METHODOLOGY

At Spate, we analyze over 20 billion search signals to identify which beauty products are most top of mind for consumers.

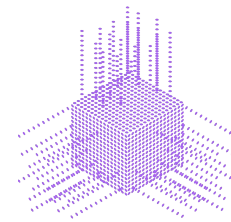
Why search data? Every time a user types a query into the search bar, they are sharing what is top of mind for them — often including concerns, questions, and context they might not share elsewhere. Spate captures billions of queries that project an unbiased lens on *real* consumer behaviors and needs.



+20B beauty related
search signals in the US



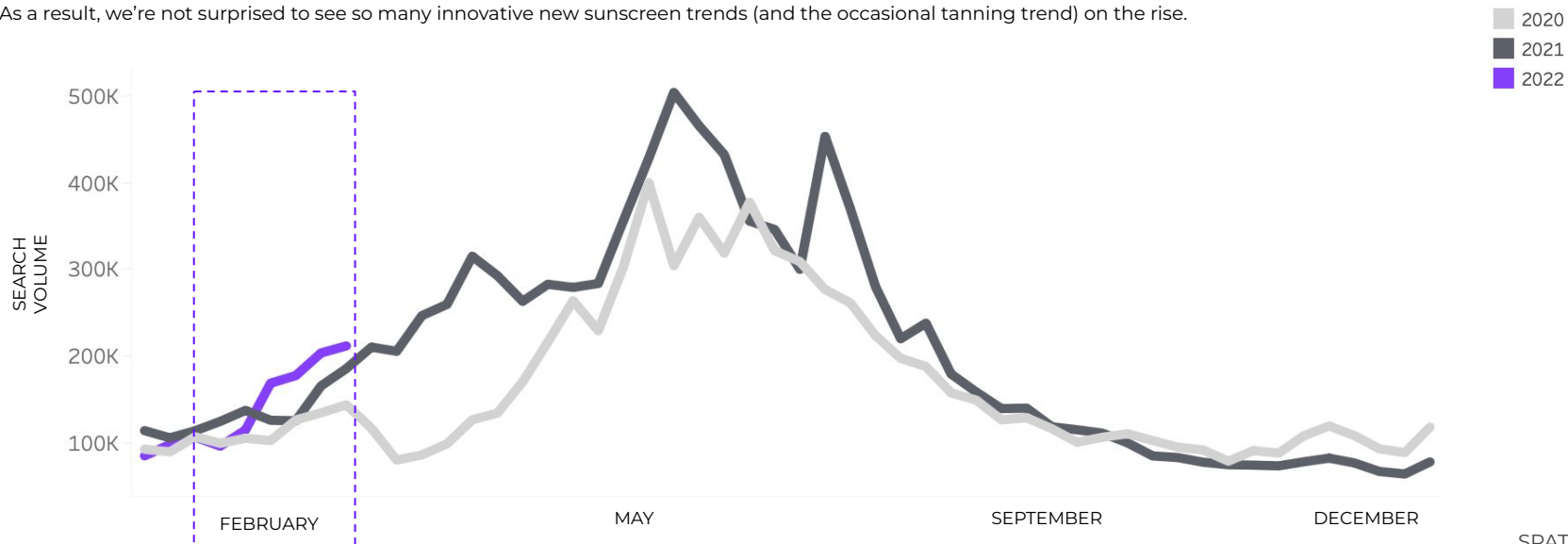
Unsupervised machine
learning to identify clusters



Trends classification for
insights and implications

SUNSCREEN PRODUCTS

Following the skincare boom of 2020 when consumers were searching for and learning about skincare, many learned that sun exposure is one of the key contributors to aging. In the subsequent months, searches for sun protection have risen and sustained growth — even beyond the typical seasonal peaks. As a result, we're not surprised to see so many innovative new sunscreen trends (and the occasional tanning trend) on the rise.



Source: Google Search data - 2020, 2021, and 2022.

SUNSCREEN PRODUCTS RANKED BY INCREASE

Sunscreen product trends driving the biggest positive change in search volume within the category:

Trend	Avg Monthly Search Volume	Increase in Avg. Monthly Search Volume ↓	YOY Growth
mineral sunscreen	64.5K	+16.1K	+33.3%
tinted sunscreen	32.9K	+8.6K	+35.2%
baby sunscreen	42.7K	+8.0K	+23.2%
zinc sunscreen	47.1K	+6.9K	+17.3%
spf tinted moisturizer	22.5K	+5.8K	+34.5%
sunscreen stick	9.5K	+3.5K	+59.0%
powder sunscreen	10.4K	+2.8K	+36.2%
travel size sunscreen	4.5K	+2.5K	+120.5%
sunscreen mist	3.5K	+1.5K	+75.0%
scalp sunscreen	4.5K	+1.4K	+42.9%

Source: Google Search data, average monthly search volume, average monthly search volume increase, and year-over-year growth comparing the past 12 months ending February 2022 vs the 12 months prior (US).

SUNSCREEN PRODUCTS RANKED BY GROWTH

Sunscreen product trends experiencing the strongest growth over the last 12 months, compared to the 12 months prior:

Trend	Avg Monthly Search Volume	Increase in Avg. Monthly Search Volume	YOY Growth ↓
travel size sunscreen	4.5K	+2.5K	+120.5%
sunscreen mist	3.5K	+1.5K	+75.0%
sunscreen stick	9.5K	+3.5K	+59.0%
sunscreen body lotion	2.9K	+1.0K	+55.8%
scalp sunscreen	4.5K	+1.4K	+42.9%
spf foundation	4.0K	+1.1K	+36.4%
powder sunscreen	10.4K	+2.8K	+36.2%
tinted sunscreen	32.9K	+8.6K	+35.2%
spf face spray	2.6K	+658	+34.6%
spf tinted moisturizer	22.5K	+5.8K	+34.5%

Source: Google Search data, average monthly search volume, average monthly search volume increase, and year-over-year growth comparing the past 12 months ending February 2022 vs the 12 months prior (US).

TANNING PRODUCTS RANKED BY GROWTH

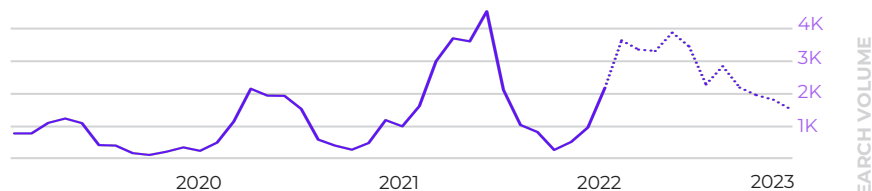
Tanning product trends experiencing the strongest growth over the last 12 months, compared to the 12 months prior:

Trend	Avg Monthly Search Volume	Increase in Avg. Monthly Search Volume	YOY Growth ↓
tanning nasal spray	720	+612	+566.2%
airbrush spray tan	4.9K	+3.1K	+163.9%
spray tan	333.4K	+154.9K	+86.8%
tan accelerator	6.1K	+1.9K	+43.4%
indoor tanning lotion	14.3K	+3.1K	+27.5%
bronzing lotion	14.1K	+2.8K	+25.1%
tanning glove	2.2K	+288	+14.9%
sunless tanner	24.9K	+2.6K	+11.7%
tanning lotion	210.6K	+14.0K	+7.1%
self tanner	270.1K	+15.3K	+6.0%

Source: Google Search data, average monthly search volume, average monthly search volume increase, and year-over-year growth comparing the past 12 months ending February 2022 vs the 12 months prior (US).



SUNSCREEN MIST



STATS:

+75.0%

YEAR-OVER-YEAR
GROWTH

RELATED SEARCHES:

Benefits	Search Volume↓ (Average Monthly)
sheer	1.5K
antioxidant	410
tinted	40
cooling	20

Ingredients	Search Volume↓ (Average Monthly)
mineral	210
vitamin c	90

Body Parts	Search Volume↓ (Average Monthly)
face	1.7K
body	1.3K

Brands	Search Volume↓ (Average Monthly)
Neutrogena	2.1K
Hawaiian Tropic	250
Supergoop!	160

SPATE POV

Sunscreen mist is a quick and easy way to apply sunscreen. While it can be applied all over, this format is most searched alongside the term “face”. Search further demonstrates that consumers are seeking both skincare and makeup benefits within this trend, from antioxidant to tinted. For example, vitamin C is searched for its additional shielding benefits on top of sun protection, and searches for tinted show that consumers are also looking for perfected and protected skin. Sun care brands should take note of the influence sunscreen has in the face category and consider positioning sunscreen mists as double-duty setting sprays.

HOW BIG IS THIS TREND

Very Low Volume
3.5K avg total monthly searches

HOW COMPETITIVE IS THE SPACE?

Medium Competition
2.9K average brand searches

WHO OWNS THE MARKET SHARE?

Few Market Leaders
2 market leaders

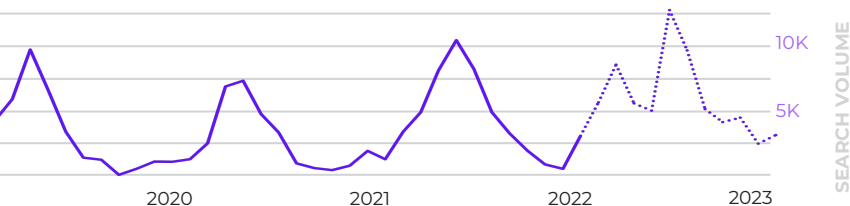
SUNSCREEN STICK



STATS:

+58.4%

YEAR-OVER-YEAR
GROWTH



RELATED SEARCHES:

Benefits	Search Volume↓ (Average Monthly)
glowing	2.5K
sheer	330
tinted	230
shimmer	90

Concerns	Search Volume↓ (Average Monthly)
sensitive	100
pores	70
aging	30
greasy	20

Ingredients	Search Volume↓ (Average Monthly)
mineral	920
zinc	740

Brands	Search Volume↓ (Average Monthly)
Supergoop!	2.7K
Neutrogena	1.5K
Sun Bum	1.2K

SPATE POV

Sunscreen sticks offer a straightforward, easy-to-apply way to protect your skin from sun damage. Consumers are searching for sticks that help create glowing, shimmering skin and have a sheer or tinted application. Searches for mineral and zinc show that consumer preference leans towards the physical sunscreen variety for this product. In a highly competitive space, set yourself apart by differentiating with a multi-tasking sun stick suitable for skin types like sensitive, mature, or oily skin. When promoting sun care products in messaging, consider a theme of radiance with consumers leaning towards a glowy (not greasy) finish to emulate the look of healthy skin.

HOW BIG IS THIS TREND

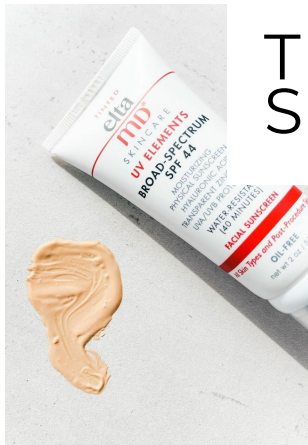
High Volume
9.5K avg total monthly searches

HOW COMPETITIVE IS THE SPACE?

High Competition
11.2K average brand searches

WHO OWNS THE MARKET SHARE?

Few Market Leaders
13 market leaders



TINTED SUNSCREEN

STATS:

+35.2%

YEAR-OVER-YEAR
GROWTH

HOW BIG IS THIS TREND

High Volume
32.9K avg total monthly searches

HOW COMPETITIVE IS THE SPACE?

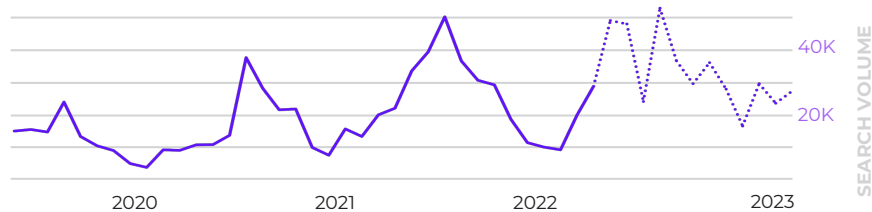
Very High Competition
74.1K average brand searches

WHO OWNS THE MARKET SHARE?

Very Few Market Leaders
4 market leaders

SPATE POV

Tinted sunscreen allows consumers to even their complexions while protecting their skin from sun exposure. Searches reveal that consumers are interested in applying tinted sunscreen in various formats, from moisturizers to sticks. In addition, searches for hydrating and unscented indicate tinted sunscreen is also being searched to address skincare concerns like dry and sensitive skin. Unlike the previous two trends, this trend is retailer-driven, with consumers searching for a place to buy their favorite brands of tinted sunscreen. Tinted sunscreen is more mainstream than the previous trends, and consumers are prioritizing accessibility. Distribution will be key in competing within the tinted sunscreen space.



RELATED SEARCHES:

Product Format	Search Volume↓ (Average Monthly)
moisturizer	2.3K
lotion	940
cream	140
stick	140

Benefits	Search Volume↓ (Average Monthly)
hydrating	460
sheer	70
unscented	70
water resistant	50

Retailers	Search Volume↓ (Average Monthly)
Target	370
Walmart	240
Sephora	140

Brands	Search Volume↓ (Average Monthly)
EltaMD	24.4K
CeraVe	20.2K
Australian Gold	9.9K

TOP INCREASE BRANDS IN SUN CARE

The sun care brands driving the most increase in search within the category are St. Tropez, Supergoop!, and La Roche-Posay:

Brand	Avg Monthly Search Volume	Increase in Avg. Monthly Search Volume ↓	YoY Growth
st tropez	122.3K	+42.3K	+52.9%
supergoop!	203.6K	+38.3K	+23.1%
la roche-posay	100.4K	+34.2K	+51.7%
eltamd	158.6K	+28.6K	+22.0%
bondi sands	78.8K	+26.9K	+51.8%
black girl sunscreen	66.4K	+25.6K	+62.7%
tanologist	52.2K	+19.9K	+61.6%
cetaphil	24.6K	+12.2K	+97.9%
cerave	89.8K	+8.0K	+9.7%
eucerin	12.9K	+6.8K	+112.1%

Source: Google Search data, average monthly search volume, average monthly search volume increase, and year-over-year growth comparing the past 12 months ending February 2022 vs the 12 months prior (US).

TOP GROWTH BRANDS IN SUN CARE

Greatest growth in the sun care products category is being driven by brands such as Bliss, Garnier, and Thank You Farmer:

Brand	Avg Monthly Search Volume	Increase in Avg. Monthly Search Volume	YoY Growth ↓
bliss	2.6K	+2.4K	+897.4%
garnier	5.1K	+4.2K	+496.4%
thank you farmer	3.2K	+1.8K	+126.2%
ultra violette	3.3K	+1.8K	+114.0%
eucerin	12.9K	+6.8K	+112.1%
solar recover	2.8K	+1.5K	+111.9%
solara	1.0K	+500	+109.1%
cocokind	9.9K	+5.1K	+107.6%
isdin	8.8K	+4.4K	+102.1%
cetaphil	24.6K	+12.2K	+97.9%

Source: Google Search data, average monthly search volume, average monthly search volume increase, and year-over-year growth comparing the past 12 months ending February 2022 vs the 12 months prior (US).

SPATE POV

Nearly two years after the early pandemic skincare boom, sun care has become ubiquitous across the beauty and personal care categories. Within the category itself, searches for anti-aging and healthy skin prevail. Take into account these updates on the growth of the category to anticipate the summer months ahead:

Multi-tasking SPF over regular sunscreen. From vitamin C-boosted to tinted SPF, consumers are searching for sunscreens with a little something extra — whether this be skincare ingredients that provide more protection or skin-perfecting benefits. With sunscreen products no longer being exclusively sought for sun defense, explore the different opportunities to enter the sun care market and capitalize on its growth.

Differentiated formats are the way to go. Consumers are searching various product formats within sun care. Consider this and figure out which sunscreen and tanner formats work best for different benefits. Whether consumers are seeking a shimmering, protective on-the-go stick for a music festival or a bronze glow that won't transfer color to their clothing, optimize your products for hassle-free application and, ultimately, cult status.

Tanning has made a noteworthy comeback. Consumers are interested in tanning and tan-supporting products that offer a flawless finish with a quick turnaround time. High growth, breakout products like tanning nasal spray also demonstrate consumers' willingness to experiment. This is a signal for sun care brands to think about extending their product offering to include tanning and for brands, in general, to prepare for the potential impact it could have on other categories.

SPATE: MACHINE INTELLIGENCE FOR THE BEAUTY INDUSTRY.

What's The Next Big Trend?

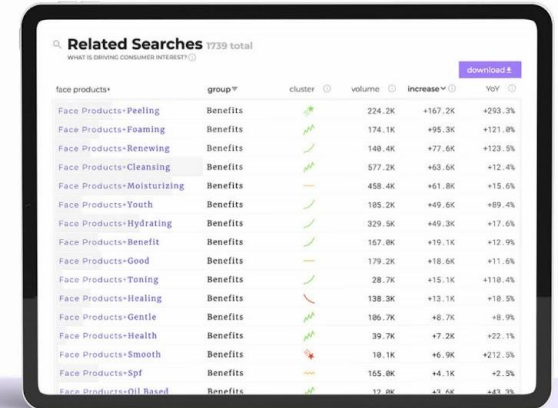
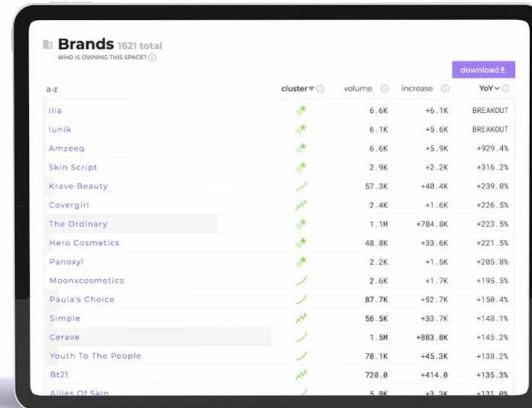
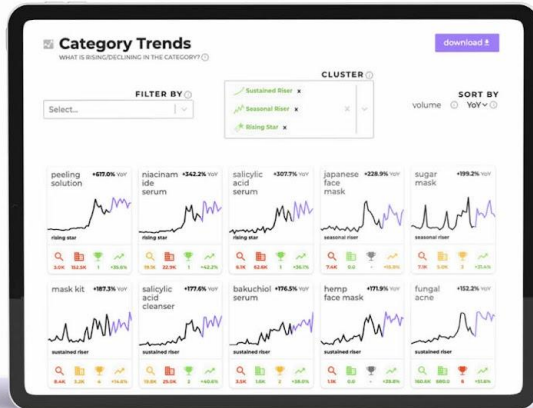
20+ billion signals in beauty and wellness to spot and predict which trends are here to stay.

Which brands are owning the space?

Measure level of competition within a space. Compare consumer interest across brands, including DTC.

How To Position A Product?

Contextual data to identify consumer needs (claims, concerns, ingredients) for messaging.



Explore the dashboard for
more sun care data:

www.spate.nyc

SPATE

