

# PULSAR\*



Applying audience  
intelligence to Sunscreen

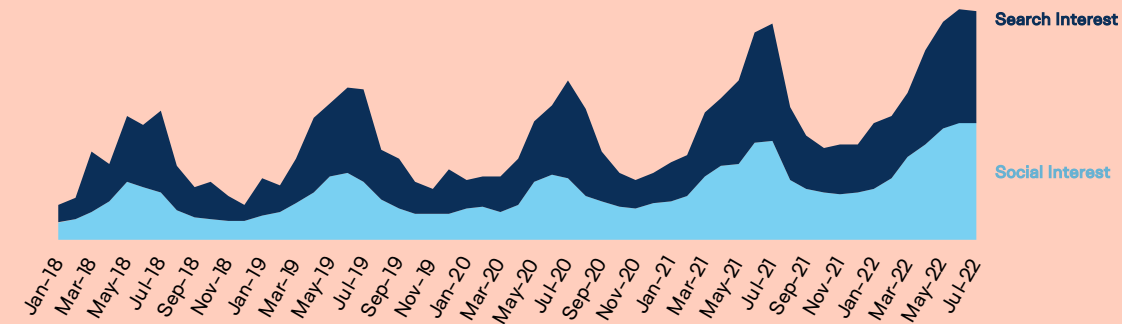
The essential product on a heating planet

Conversation around sunscreen continues to evolve and grow online, reflecting changes in climate, more proactive attitudes toward cancer protection, and the inconstant nature of beauty trends.

As both search and social data indicate, it's a topic that attracts increasing interest year on year. Audiences look to share perspectives, information, humor and even strong anti-sunscreen opinion across a range of different platforms.

To better understand the conversations and audiences found within this category, and how these differ across the world, we analyzed almost 1.2 million English-language posts made between March 18 – August 11 2022, across the USA, UK, Australia and South-East Asia region (including Singapore, Malaysia, Indonesia, Vietnam, Thailand, and the Philippines).

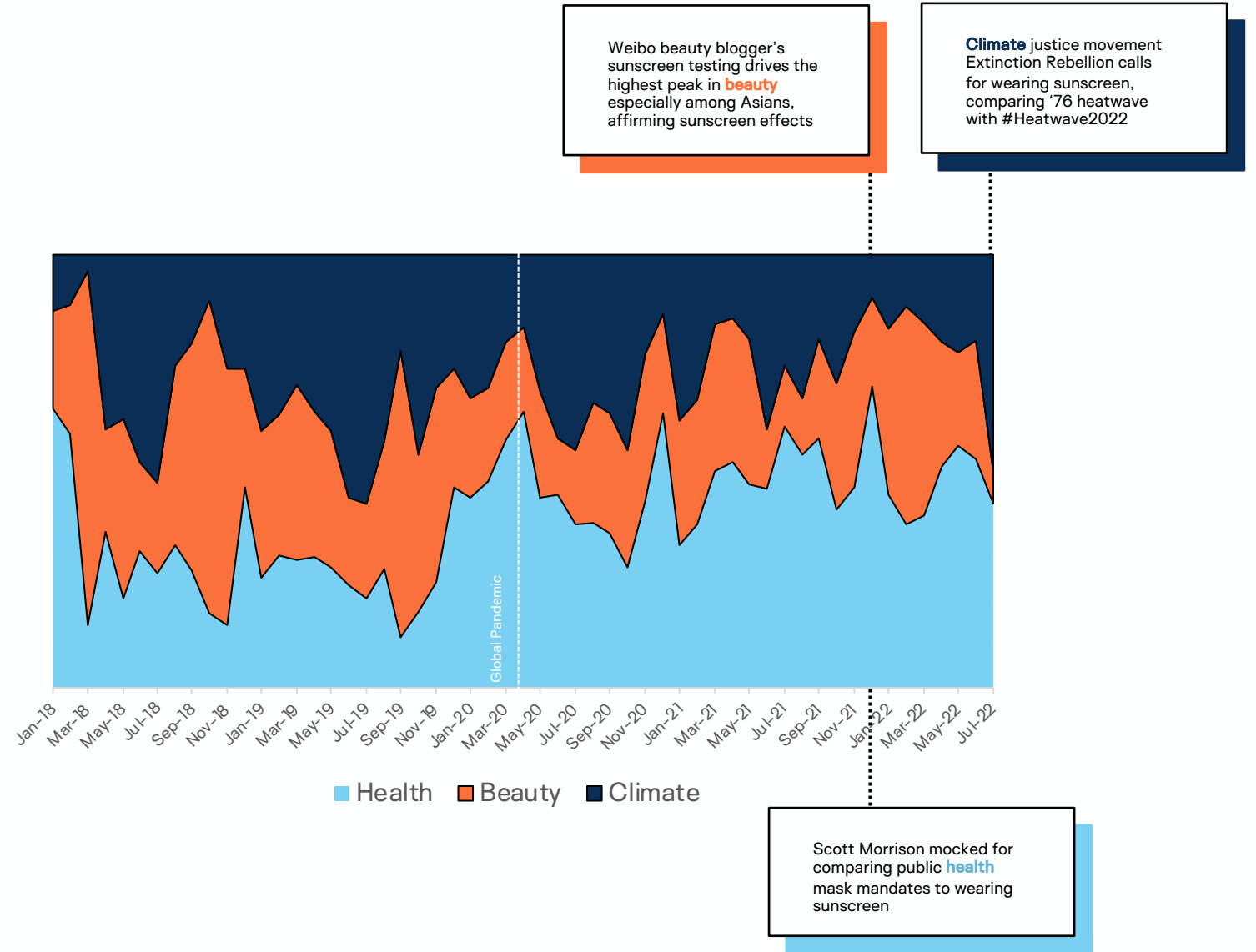
This data incorporates posts & conversations from Twitter, TikTok, Facebook, Instagram, Pinterest, Reddit, Tumblr, YouTube, Amazon, Blogs, Forums and online news.



Mentions of sunscreen on Twitter, normalized, Jan 2018 – Jul 2022. Source: Pulsar TRENDS & Google Trends

## Post-pandemic sunscreen trend is evolving towards health and skin beauty

Pre-pandemic sunscreen perception has been shaped around sun *protection*, which appears to be more tied to a seasonal definition and climate. Since the pandemic, however, the perception of sunscreen has shifted from periodic protection toward essential, and regularly sustained, health. This also has impacted on the relationship between sunscreen and beauty, which has not grown at the same pace as the health conversation post-pandemic, but nonetheless remains a key driver of both conversation and individual moments – this is typified by a viral Weibo post, in which a beauty influencer tested the efficacy of different skincare sunscreens. More recently, the July 2022 European heatwave throws climate change to the forefront of sunscreen conversation.

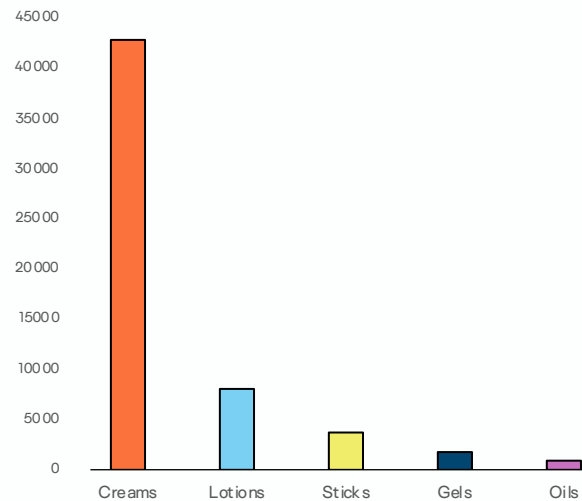


# What is it people are putting on their skin, exactly?

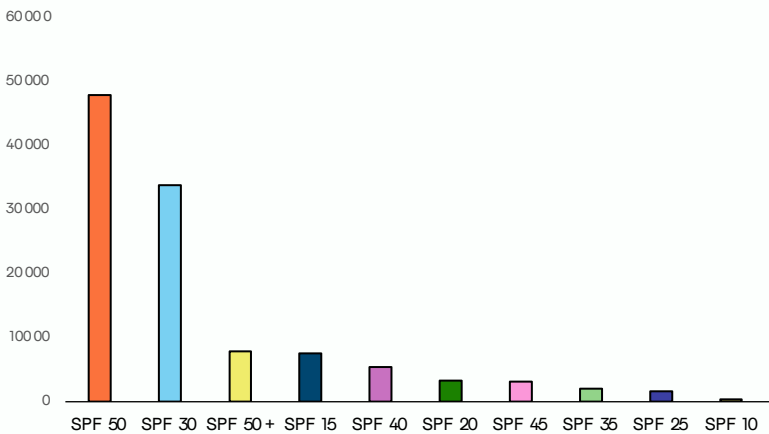
Globally, cream is by far the most mentioned formula-type. Differences in language and culture impact how these products are spoken about, however, with 'lotion' used interchangeably, and to differing extents across the anglophone world.

At the same time, we see a great degree of curiosity and confusion around different SPF levels, as individuals both questions its definition, and also the actual difference between SPF 50 and SPF 30.

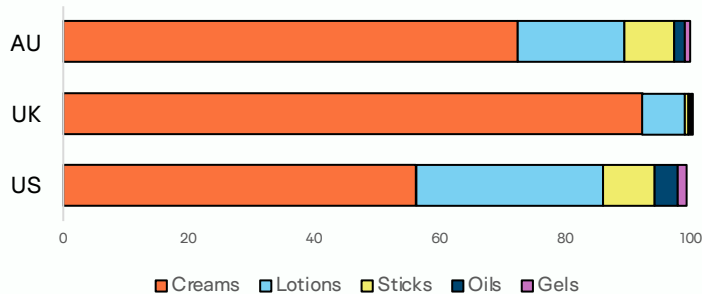
Sun cream: the most popular form of sunscreen by far



SPF 50 vs SPF 30: where the protection conversation lies



Sunscreen types by country



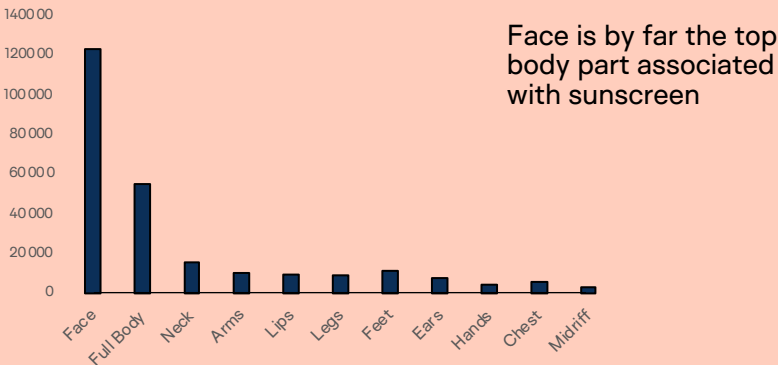
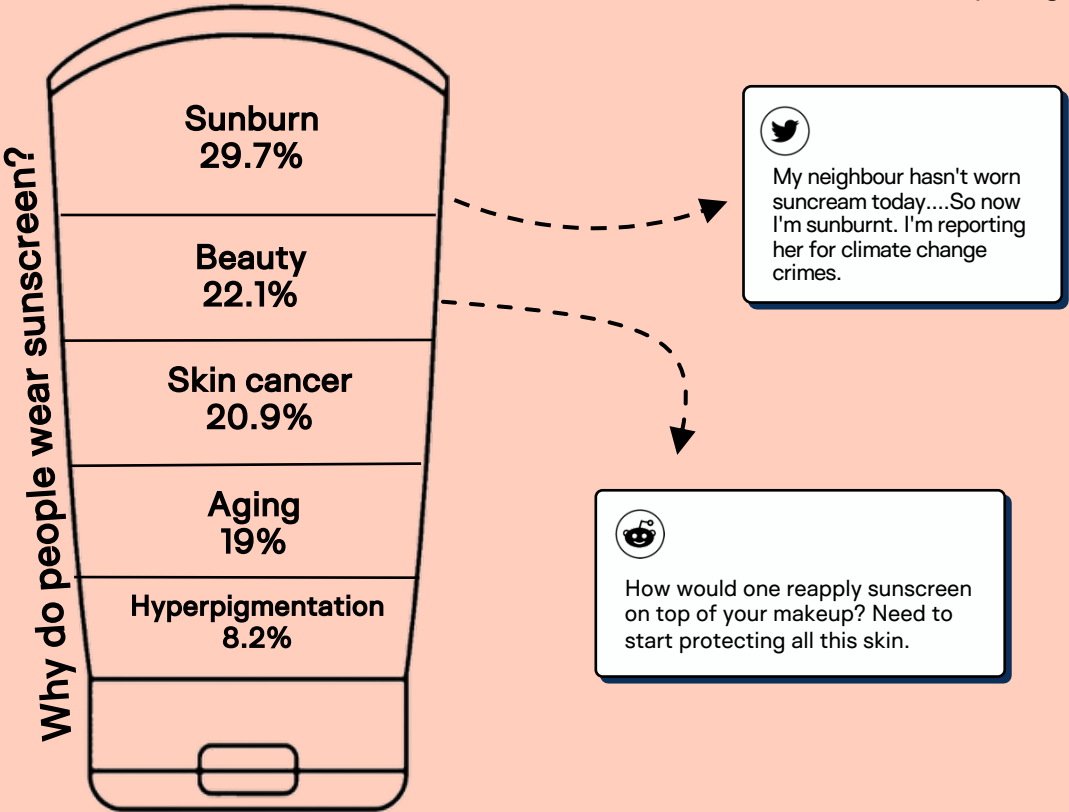
I was today years old when I realized that the difference in protection between SPF 30 and SPF 50 is only around 1%

The top application types (left), the country split (bottom left) and different SPF levels (right) in the sunscreen conversation across Twitter, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, normalized, Mar 18 – Aug 8 2022. Source: Pulsar TRAC

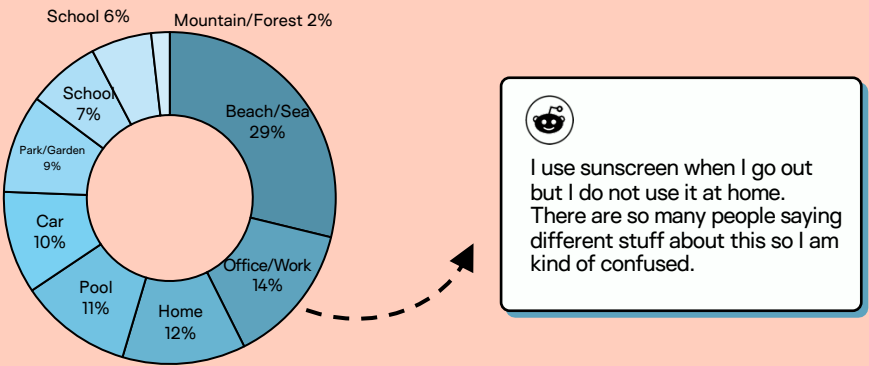
# Health concerns see sunscreen application become a daily behavior

As our planet continues to break temperature records, solar exposure is increasingly understood to be an ongoing threat to public health. Health concerns such as sunburn and skin cancer account for almost half of the stated reasons why people wear sunscreen, with cosmetic reasons comprising the other half.

We're also seeing various behaviors becoming more entrenched in the public consciousness, from beauty hacks which outline how to reapply formulas under make-up, to the importance of wearing it indoors as part of a settled routine, rather than simply outdoors on particular occasions.



Sunscreen occasions are moving toward daily routine



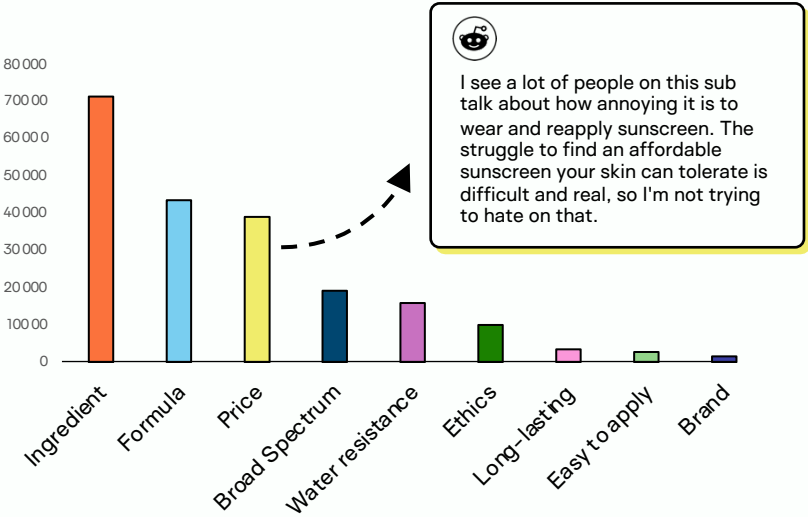
# What makes people buy sunscreen?

As the importance of wearing sunscreen on a daily basis is increasingly emphasised, healthy ingredients & formulas tailored for different skin types play a key role in purchasing decisions. Being able to match up your SPF product against a wider skincare routine is also a popular consideration, and goes some way to explaining the prevalence in the market of tinted moisturisers. Naturally, price also emerges as a top concern. High-quality sunscreen often comes with a high cost, providing an access barrier to sun protection.

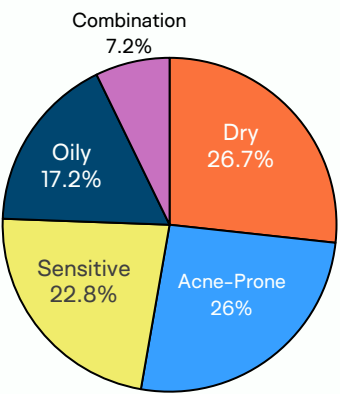
And where are people buying it from? When looking at the top sunscreen retailers mentioned in online conversation, we can see that ecommerce giants like Amazon and eBay are out-performing even the largest conglomerates such as Walmart and Sephora.

Mentions of purchasing factors (top left) and skin types (top right) in association with sunscreen and the most shared retail websites (bottom left) in the sunscreen conversation across Twitter, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, normalized, Mar 18 – Aug 8 2022. Source: Pulsar TRAC

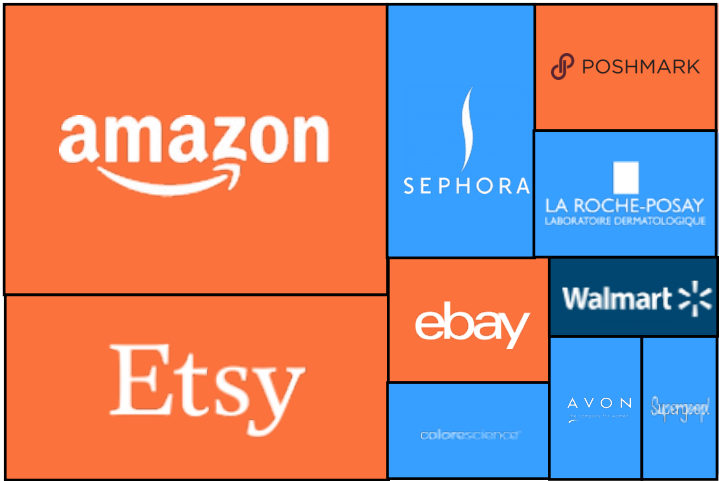
The recipe behind purchasing decisions



Skin type mentions in relation to sunscreen



**Reddit Comment:** I have oily skin and a lot of acne too. Most of the sunscreens are just not affordable 🥲 The ones that are affordable mostly have bad reviews.



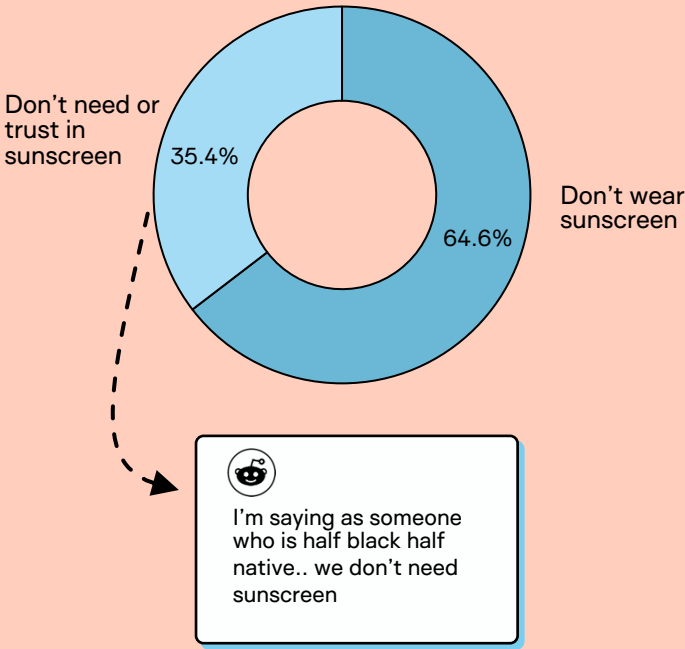
Most mentioned retailers: Ecommerce outnumbers brand outlets

- E-commerce
- Brand Outlets
- Retailers

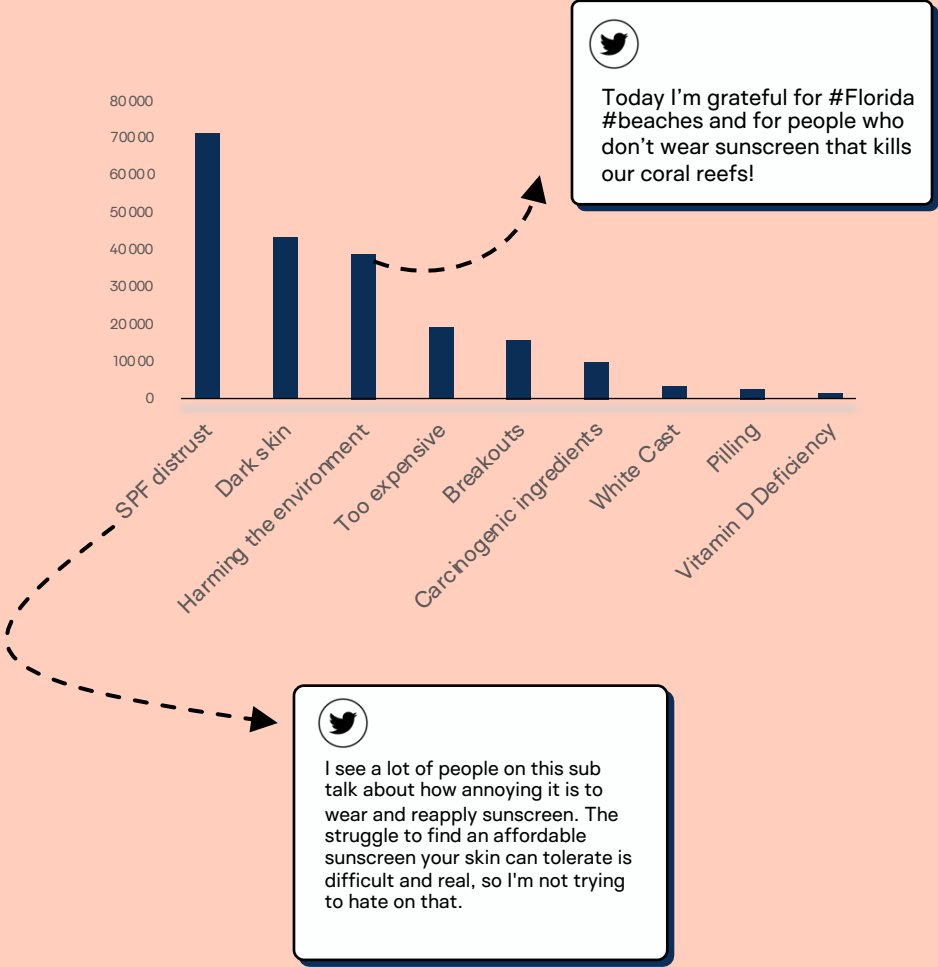
# Attitudes towards sunscreen: is sunscreen a scam, or worse?

The main topics driving anti-sunscreen conversations can be divided between three distinct strands. One is more passive, and rooted in inaccurate claims that people with darker skin tones don't need to use skin protection. The other frames sunscreen as a deeply harmful substance in its own right, suggesting that the product causes, rather than protects from, harmful cancers. This overlaps with the third point, which again details the specific carcinogenic chemicals being used in sunscreen, but emphasises the destruction this delivers to coral reefs, and nature more broadly.

Over half of the conversation about sunscreen application behavior mentions not wearing sunscreen



Why aren't some people wearing sunscreen?



Attitudes towards sunscreen (left) and reasons not to wear sunscreen (right) in the sunscreen conversation across Twitter, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, normalized, Mar 18 – Aug 8 2022. Source: Pulsar TRAC



# Different communities talk sunscreen differently

The US & UK wrangle with distrust in sunscreen as cancer concerns dominate Australia

By clustering the communities taking part in the sunscreen conversation, according to their shared online behaviors and affinities, we see Australia emerge as an outlier compared to the USA and UK. Beauty Gurus and Black Sunscreen Advocates reflect the nation's concerns with beauty, darker skin and health. In Australia, by contrast, the conversation is more politicised, and dominated by mainstream news aficionados, expressing concerns about cancer, product recalls and carcinogens.

## Black sunscreen Advocates

Young people of color are stressing the importance of wearing sunscreen for darker skin and are likely to share viral posts underlining this fact. Black Girl Sunscreen is regularly mentioned as a community favorite.

## Health Pros

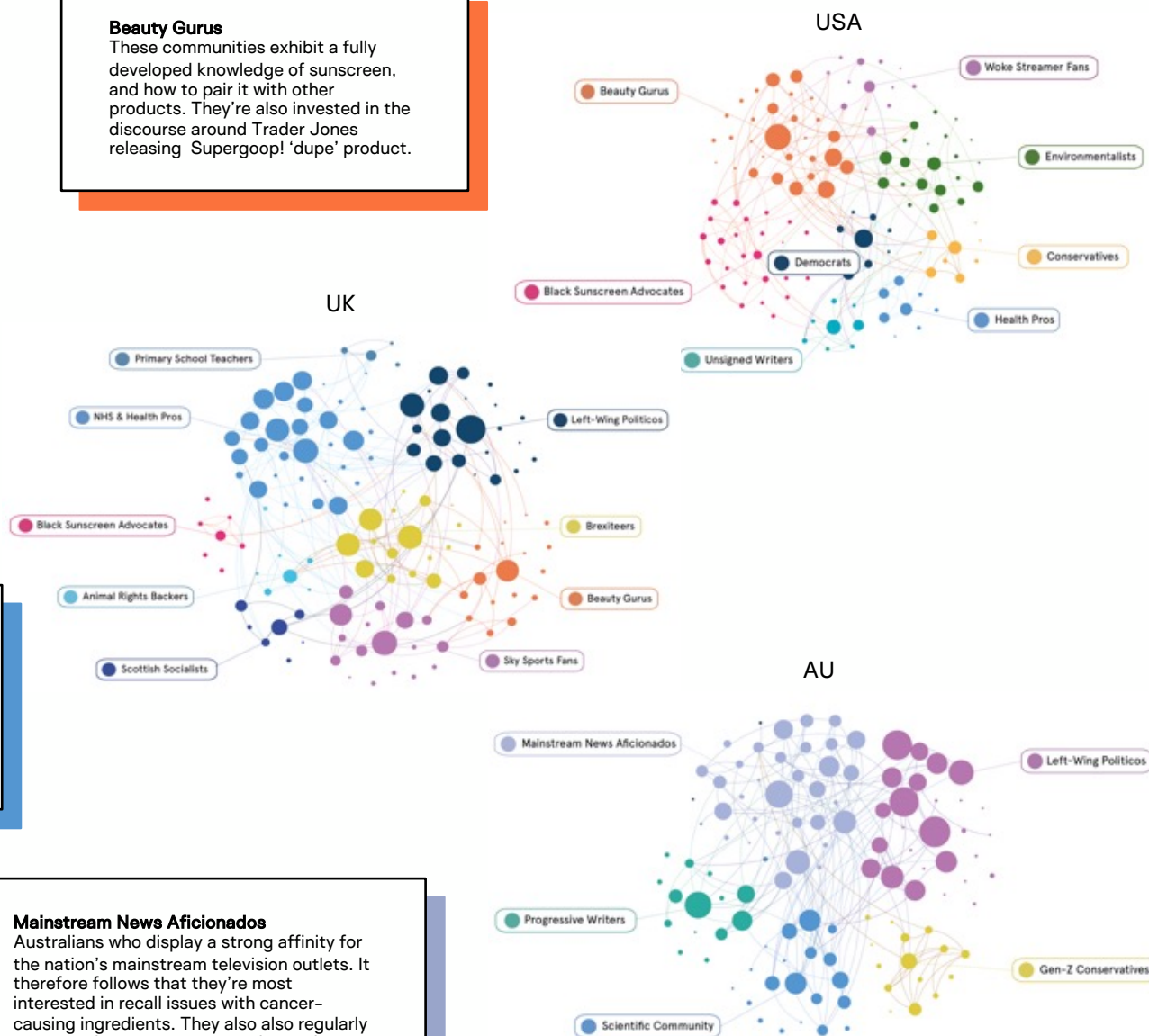
#Heatwave is the main concern among this community. They share information over how to brace for the hot weather. There are comparisons within this group between the kind of mask use mandated over the pandemic, and a hypothetical mandate for wearing sunscreen.

## Mainstream News Aficionados

Australians who display a strong affinity for the nation's mainstream television outlets. It therefore follows that they're most interested in recall issues with cancer-causing ingredients. They also regularly urge people to use sunscreen, in another indication that regular sunscreen application has become fully mainstream.

## Beauty Gurus

These communities exhibit a fully developed knowledge of sunscreen, and how to pair it with other products. They're also invested in the discourse around Trader Jones releasing Supergoop! 'dupe' product.





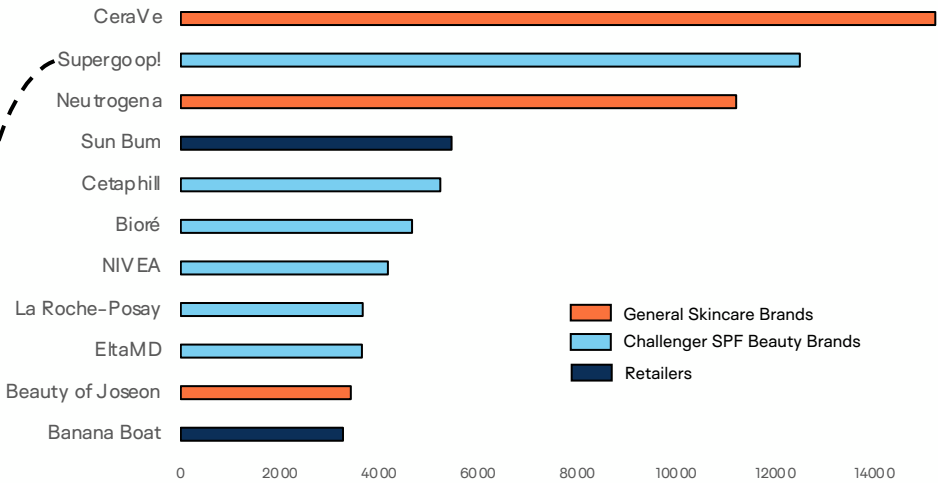
# Get the glow! From primer to hair protection, sun care has come to resemble skincare

Beauty gurus are crucial to shifting the perception of SPF from tanning to skincare

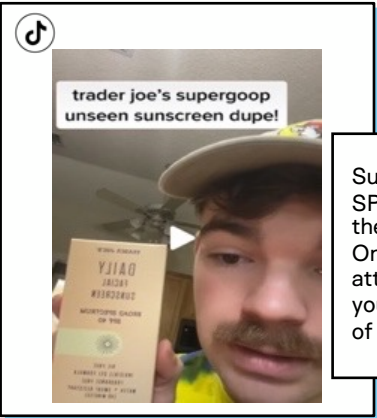
Backed by beauty influencers on social media, the burgeoning SPF beauty trend is becoming more tied to daily skincare routines and less associated with seasonal tanning. SPF makeup products such as moisturizers, foundations and lipsticks are leading this beauty trend. A number of brands with product ranges beyond sun protection look to have benefited from this more holistic viewpoint, as brands such as Supergoop! or Beauty of Joseon usurping more established sun protection names like Banana Boat.

The most-mentioned brands (left) and SPF beauty products (right) in the sunscreen conversation across Twitter, Reddit, Blogs and Forums, normalized, Mar 18 – Aug 8 2022. Source: Pulsar TRAC

SPF Skincare brands edge out tanning brands

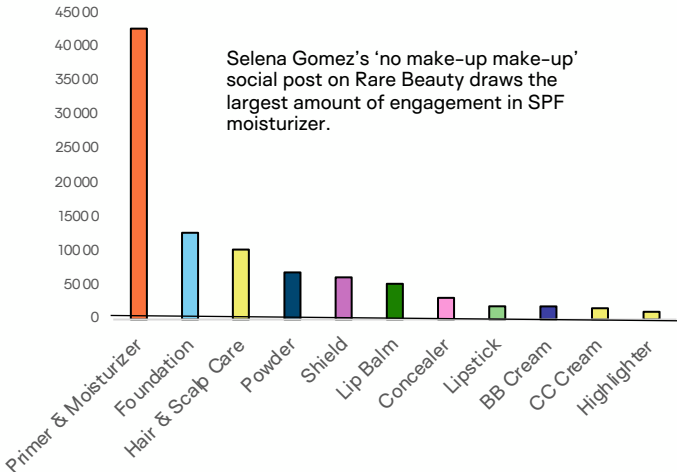


From reviews to viral moments, TikTok beauty gurus are ensuring SPF remains a trending topic



Supergoop! gained a huge fan base during the pandemic. Its SPF skincare products went viral thanks to their inclusion in the daily routines of TikTok beauty gurus. One TikTok went viral, meanwhile, when the poster drew attention to a Supergoop! 'dupe' at Trader Joe's. For younger audiences in particular, a trusted influencer's stamp of approval appears to remain a hugely important factor.

The most-talked SPF beauty products



Selena Gomez's 'no make-up make-up' social post on Rare Beauty draws the largest amount of engagement in SPF moisturizer.

My new Rare Beauty Positive Light Tinted Moisturizer Broad Spectrum SPF 20 has arrived in 24 flexible shades only SEPHORA It's "no-makeup" makeup in a bottle that lets the real you shine with smooth glowy, skin and sun protection in one. What I love most, is that it feels good to wear Can't wait for you guys to try! <https://www.sephora.com/.../rare-beauty-by-selena-gomez...> @Selena Gomez

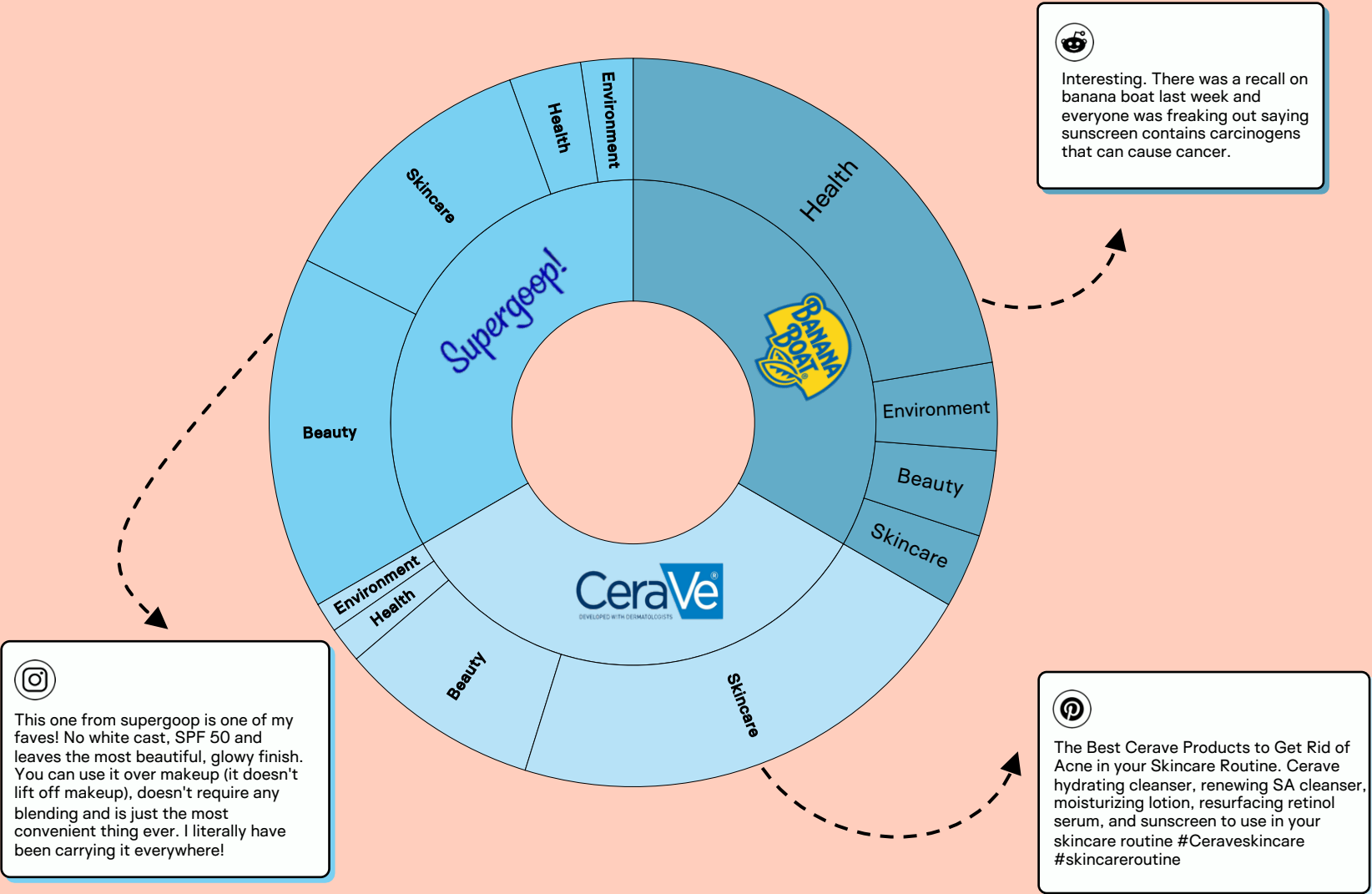
# Brand spotlight: the cult-favorites vs the traditional brand

Supergoop!'s education campaign has changed consumer behavior + boosted a fan-based community

Behind the hypes and trends of sunscreen, there are three brands that demand particular attention, as each reflects a main concern amongst consumers. Traditional mainstay Banana Boat has, following a product recall, become the focus of conversation that frames its impact on both human health and the environment in a negative fashion.

CeraVe and Supergoop! have both attracted colossal interest as either part of a skincare routine, or else as a make-up 'hack'. CeraVe is more affiliated with skincare, particularly acne solutions, while Supergoop!'s education-based campaigns, backed by skincare beauty influencers on Instagram and TikTok, doubles down on the importance of 'reapply' and 'everyday' sunscreen.

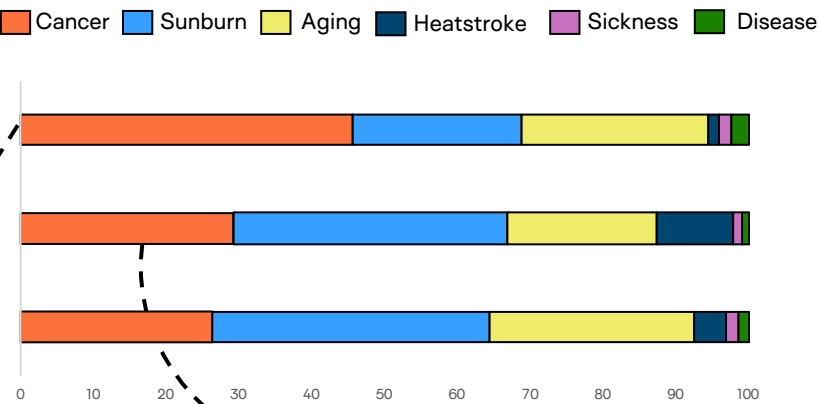
Becoming identified with the beauty or skincare scenes, in which individuals openly share their advice and recommendations, appears to be a powerful engine for driving either very public conversations on Image-based social platforms, or more confidential, lengthy advice across anonymised platforms like Pinterest or Reddit. Alternatively, as an incumbent largely focused on preserving it's reputation as healthy, Banana Boat appears in a much more vulnerable position.





# Cancer and sunburn top list of health concerns in association with sunscreen

Sunburn is the most mentioned health concern mentioned in the US and UK, while cancer is the most mentioned within Australia. Cancer conversation is split, with users claiming sunscreen either causes or prevent skin cancer and melanomas.

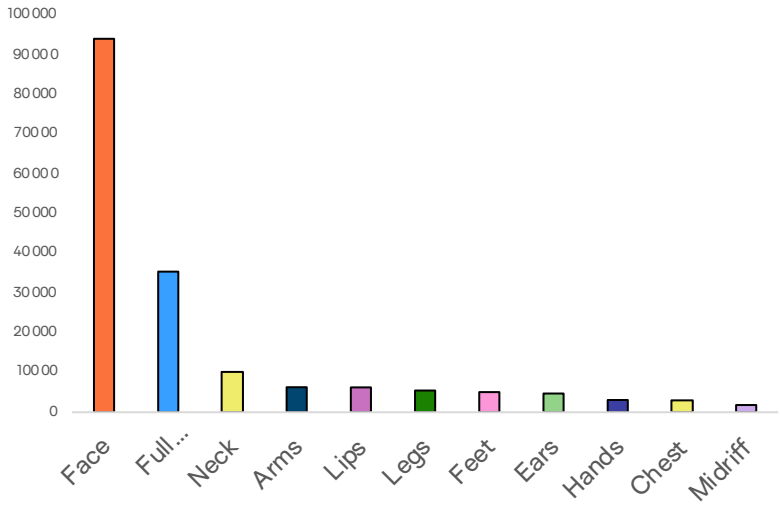
The most-mentioned health concerns by country



 sunscreen users have a higher rate of melanoma. sunscreen is a massive scam.

 Important tip for early career Biologists: wear sunscreen every day during field work. Skin cancer is really common in our field.

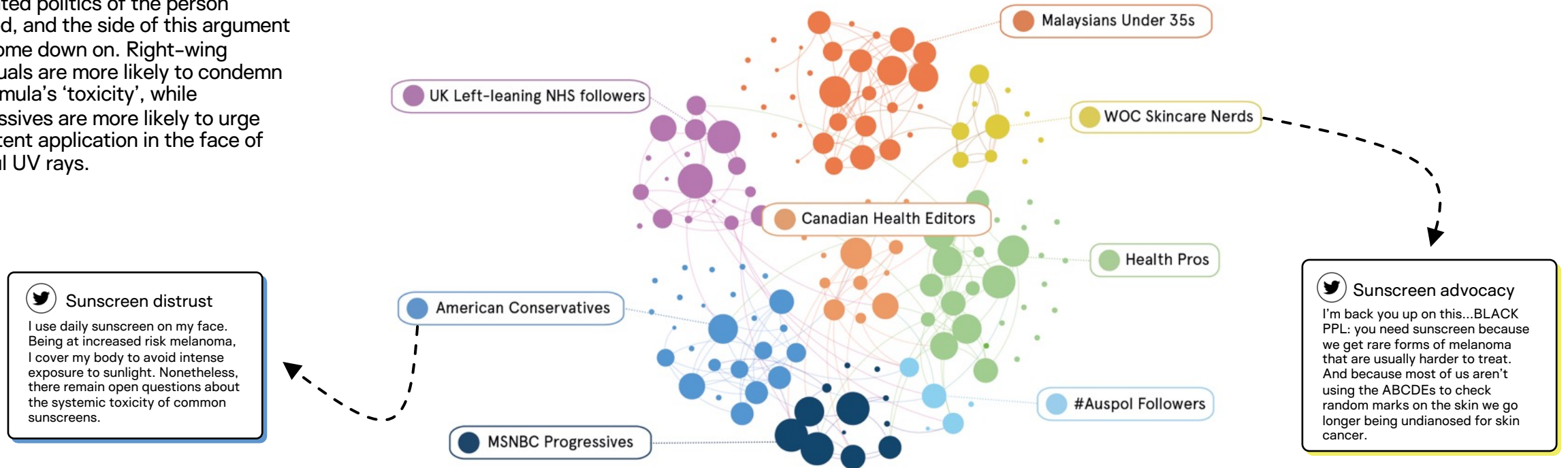
Face is the body part most associated with skin cancer



The most-mentioned health concerns (left), the body parts associated with cancer (right) in the Sunscreen conversation across Twitter, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more. normalized, Mar 18 – Aug 8 2022. Source: Pulsar TRAC

## Which communities engage with sunscreen and cancer as topics?

There is a strong correlation between the stated politics of the person involved, and the side of this argument they come down on. Right-wing individuals are more likely to condemn the formula's 'toxicity', while progressives are more likely to urge consistent application in the face of harmful UV rays.

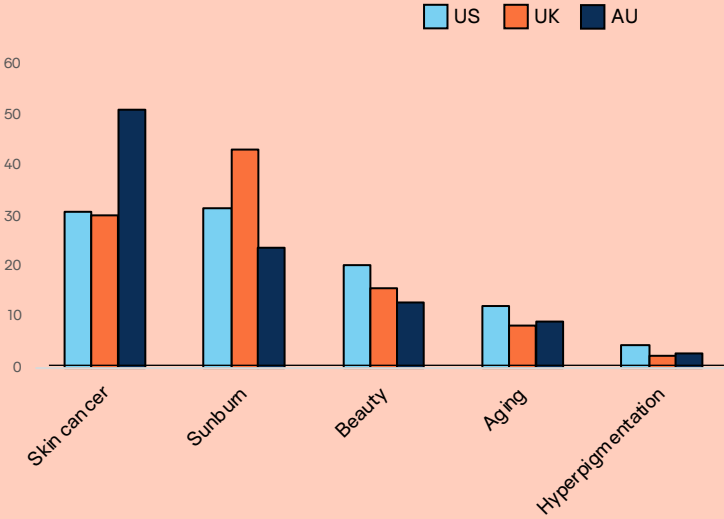


# Australia can give us a glimpse into the future of sunscreen

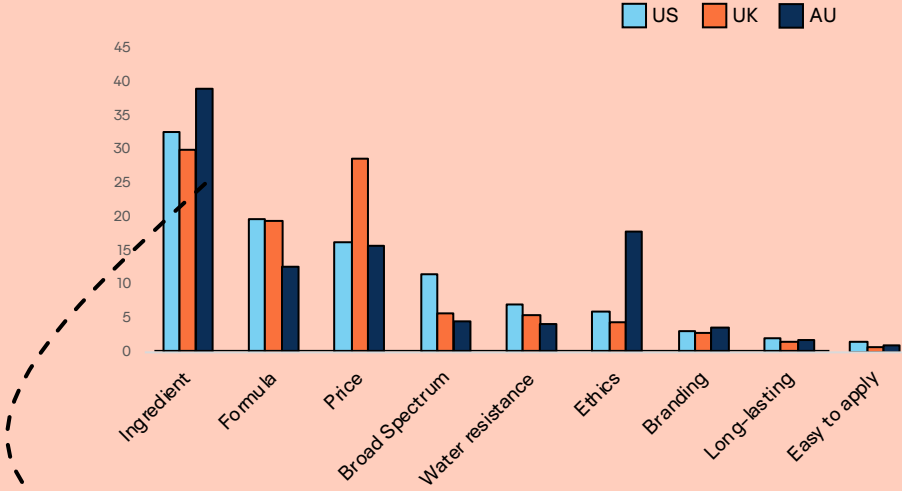
Australia can provide an indicator of the future, given that it's average national temperature has long been greater than the more distributed USA or euphemistically 'temperate' UK. As such, Australia acts as an outlier when asking either why people wear sunscreen, or why they pick particular brands.


Australian audiences are more likely to talk about the long-term impact on sun health such as skin cancer and aging, while the USA and UK conversation skews to the more immediate impact of sun damage through sunburn. At the same time, Australians also exhibit a greater interest in understanding what ingredients make up a product, as well as the ethics behind its production. Conversely, they're also slightly more likely to take the branding of a particular brand into account.

Stay protected... from what?  
Reasons for wearing sunscreen by region



Why do people wear sunscreen?



 I see a lot of people on this sub talk about how annoying it is to wear and reapply sunscreen. The struggle to find an affordable sunscreen your skin can tolerate is difficult and real, so I'm not trying to hate on that.

Mentions of reasons (left) and buying factors (right) by region in the Sunscreen conversation across Twitter, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, Mar 18 – July 5 2022. Source: Pulsar TRAC

# PULSAR\*

Pulsar is the leading AI-powered audience intelligence platform, combining conversational and behavioral signals from the world's leading digital sources to help organizations understand their audiences and create messages that matter to them.

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