

# Project Sunshine – Consumer Sentiment

BCN PEG | December 2023

---

**DRAFT**

**BAIN & COMPANY** 

## A G E N D A

### **Consumer sentiment - Amazon**

---

Sentiment - Social media

---

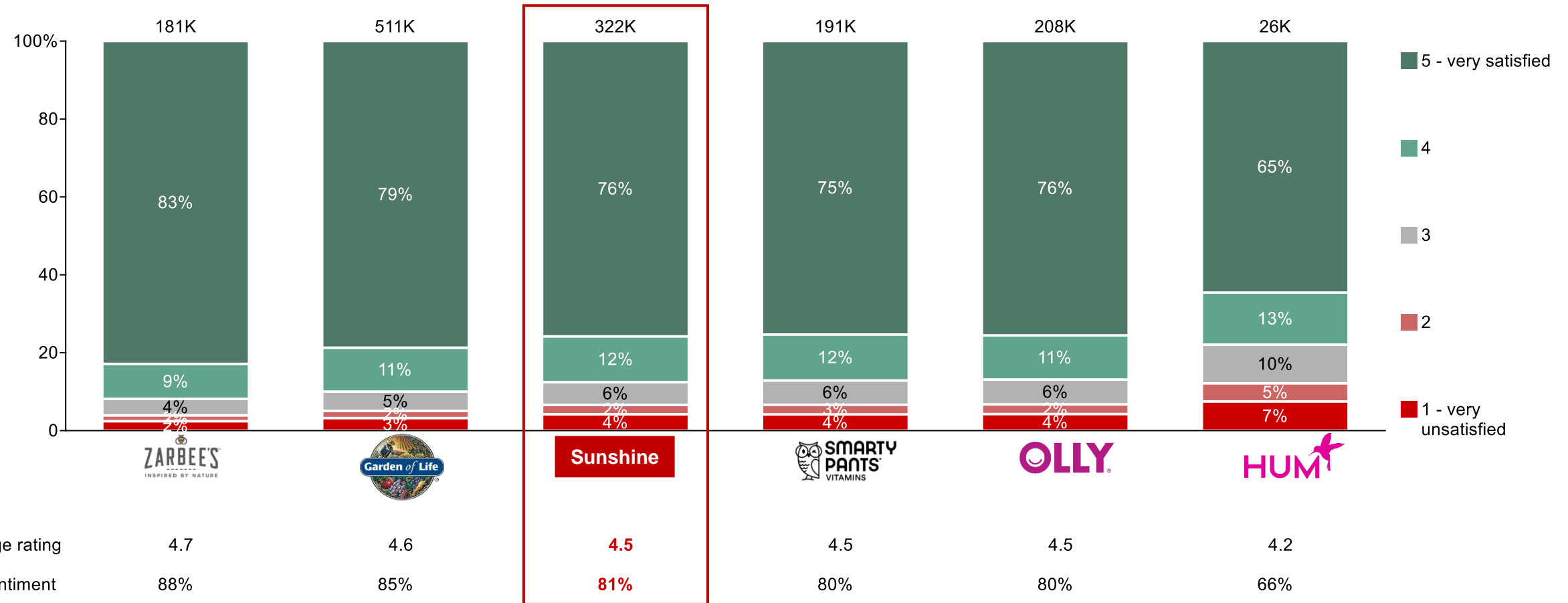
Positioning/ optimization - Amazon

# Overall ratings: On Amazon, Sunshine has a strong customer advocacy with >80% NPS; Garden of Life and Zarbee's slightly ahead

## CONSUMER SENTIMENT

/ AMAZON

# of ratings - all-time, as of Nov 30, 2023



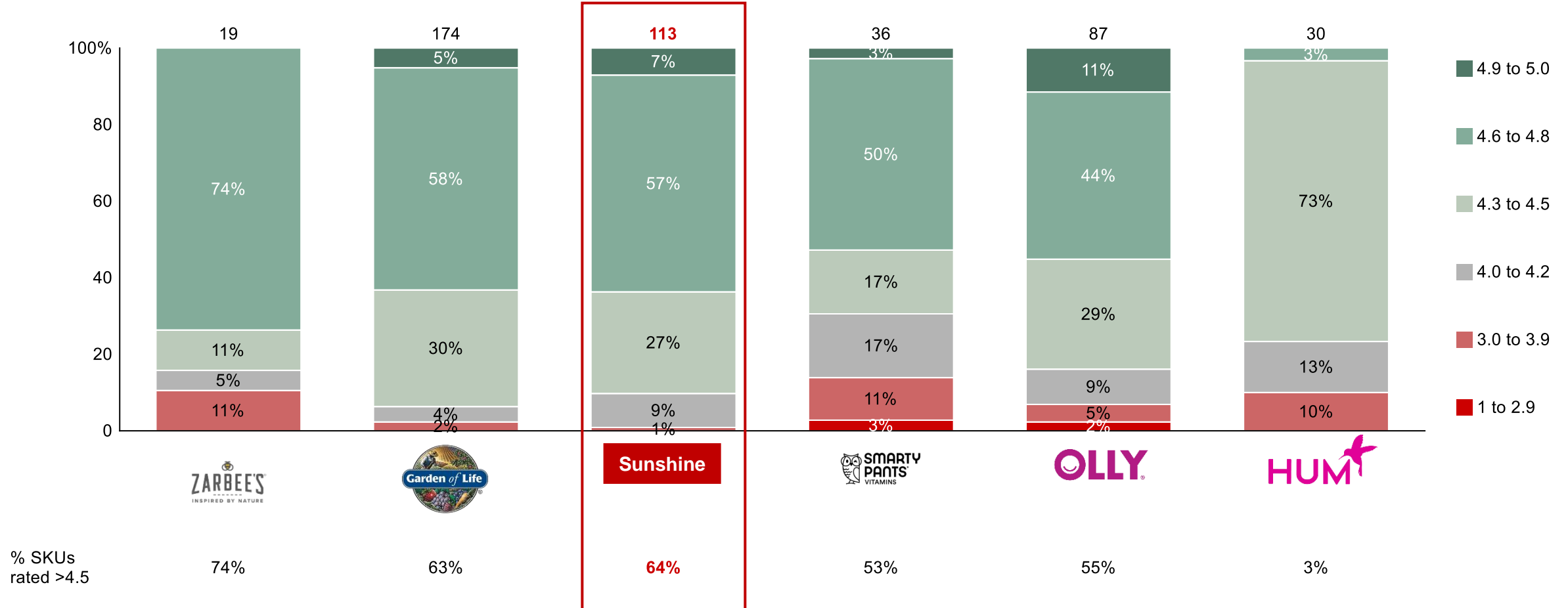
Note: Net sentiment = % 4-5 ratings minus % 1-2 ratings  
Source: Amazon.com

# SKU-level sentiment distribution: Just ~1% of Sunshine's 100+ SKUs rated <4.0; ~65% rated 4.5+

## CONSUMER SENTIMENT

/AMAZON

# SKUs by average rating



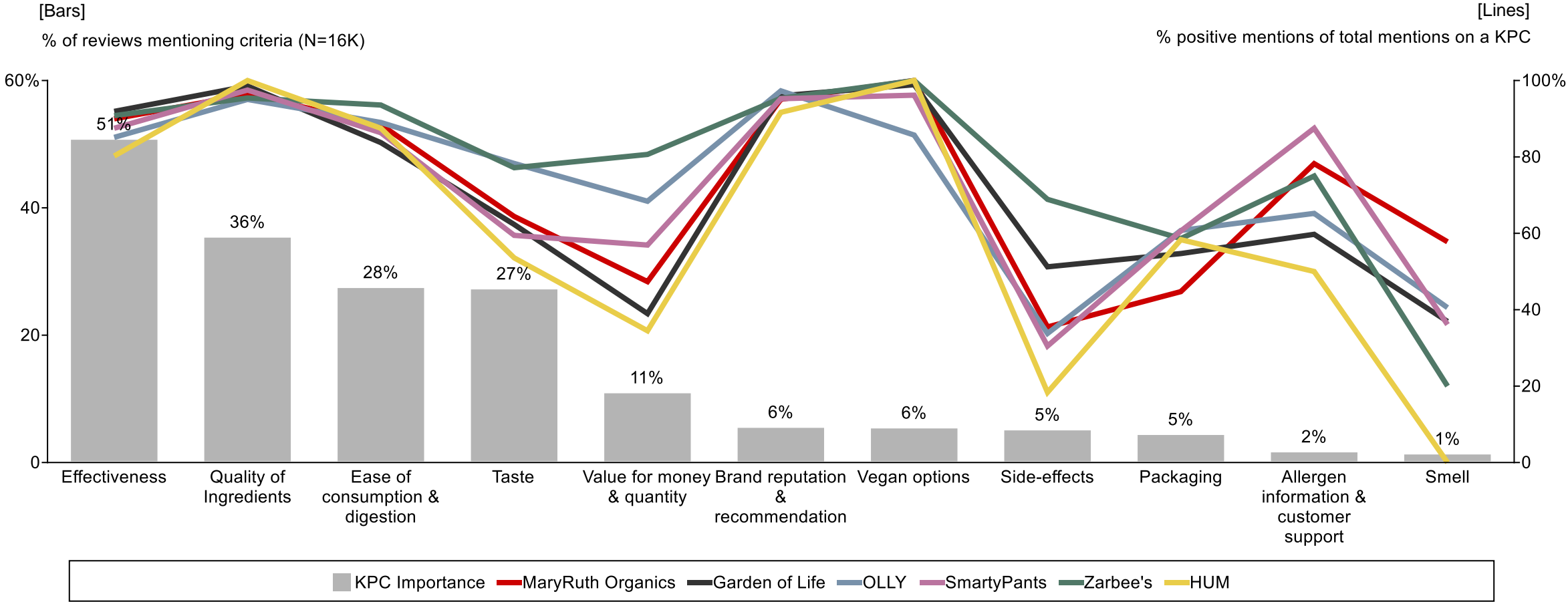
Source: Amazon.com

This information is confidential and was prepared by Bain & Company solely for the use of our client; it is not to be relied on by any 3rd party without Bain's prior written consent

# Sentiment drivers: Effectiveness, quality of ingredients, ease of consumption/ digestion, and taste are the top-4 most-cited aspects in consumer reviews

CONSUMER SENTIMENT

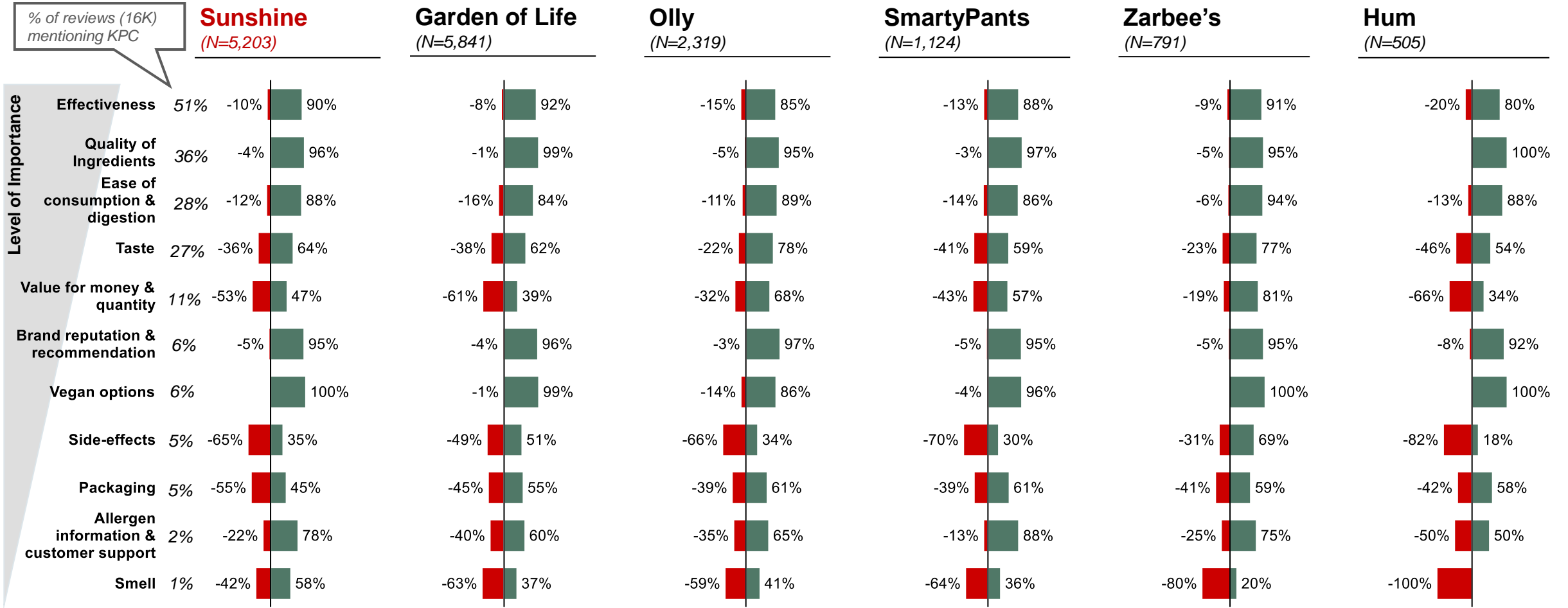
/AMAZON / AI-ANALYSIS, DIRECTIONAL



# Sentiment Drivers: Effectiveness, Ingredients' quality, ease of consumption, vegan options are Sunshine's strongholds; taste, value for money present a mixed bag

CONSUMER SENTIMENT

/ AMAZON / AI-ANALYSIS, DIRECTIONAL



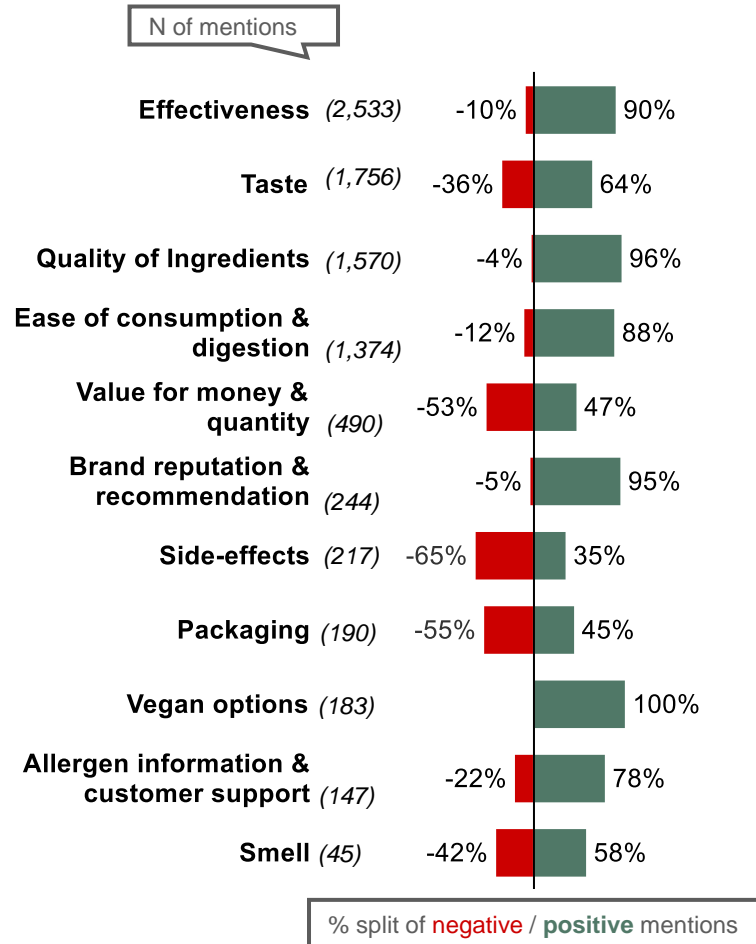
Note: Based on sample of reviews between Jan 2023 and Nov 2023, sampled such that avg. rating of the sample is in line with overall avg. rating for the brand; negative signs for representation purpose only  
Source: Amazon.com Reviews, OpenAI analysis

# Sentiment drivers | Sunshine: Consumers appreciate the effectiveness and quality

CONSUMER SENTIMENT

/ AMAZON / AI-ANALYSIS, DIRECTIONAL

## Sunshine (N=5,203)



## Commentary

### Effectiveness

"I'm thrilled with the **positive impact** Sunshine's Adrenal Focus has had on both myself and my 13-year-old. After using it, I noticed a significant improvement in my teen's concentration at school. The **product is effective**"

"**Helps** the littles **relax and sleep soundly**"

"It's thick, but **very good and effective!**"

"**Didn't work** for my kids"

### Taste

"**Great taste!**"

"The **taste is really delightful**"

"This product **tastes awful**. I tried it the first time by itself. Then next time I tried with juice. I am unable to take it because of the taste. I'm disappointed because I believe it has great benefits."

"**Doesn't taste good** and there was something I couldn't finish chewing in one of the gummies"

### Quality of Ingredients

"Great **Melatonin-free** and **Sugar-free** options"

"Tasty gummy with **max amount of D3**, meant for older kids"

"Organic vitamins **all natural ingredients**"

"Toddler approved, **clean ingredients**"

### Ease of consumption & digestion

"The supplement is **easy to take** and has a pleasant, mild taste."

"I love these **easy to digest enzymes**. They have definitely helped with the bloating and allows faster digestion."

"Love these for the whole family. **Easy to digest** and easy for the whole family to take daily"

"While I like the brand and ingredients, **the format is a tough sell** to our kids. You can't compete with gummies these days and asking them to drink something viscous and somewhat intense... it just isn't going to happen."

Note: Based on sample of reviews between Jan 2023 and Nov 2023, sampled such that avg. rating of the sample is in line with overall avg. rating for the brand; negative signs for representation purpose only  
Source: Amazon.com Reviews, OpenAI analysis

## A G E N D A

Consumer sentiment - Amazon

---

**Sentiment - Social media**

---

Positioning/ optimization - Amazon

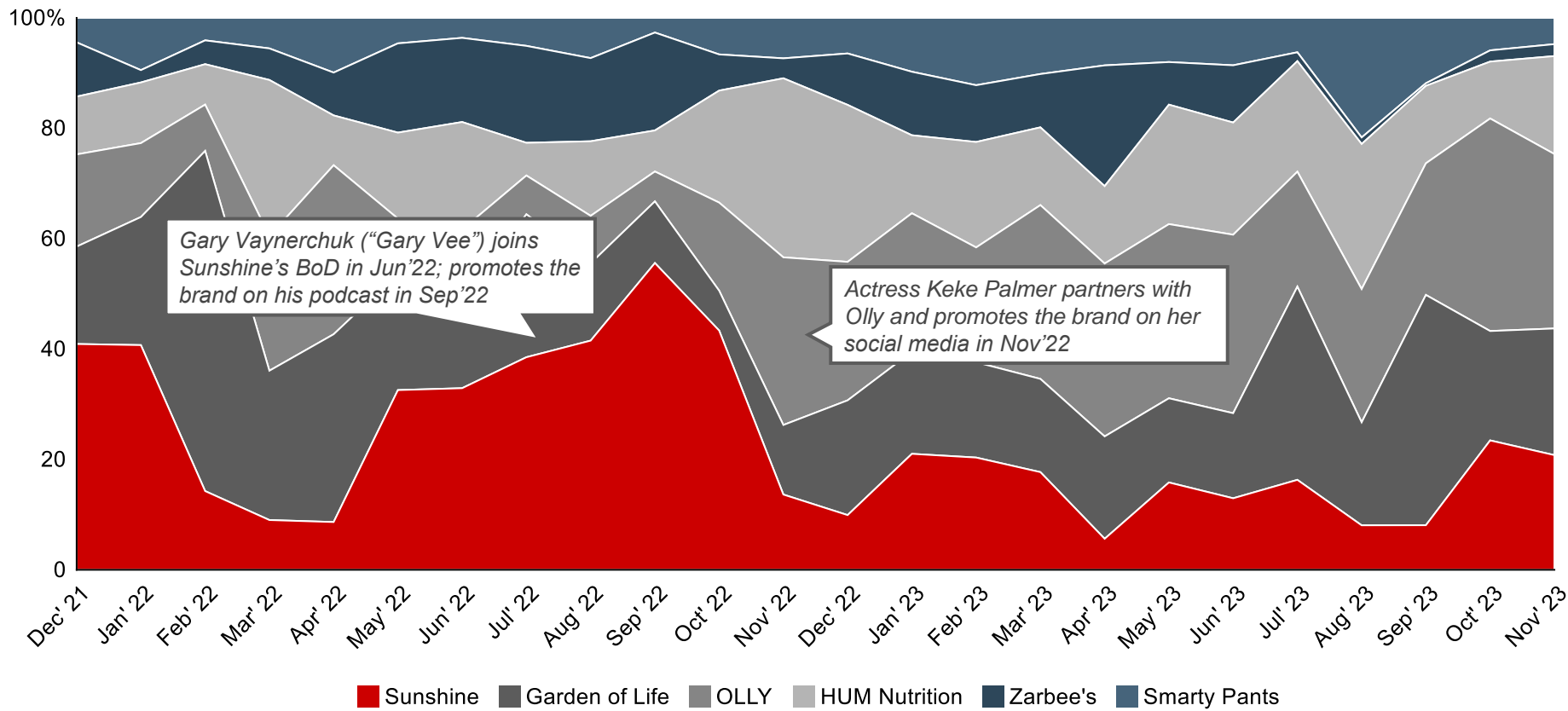


# Share of Voice: Sunshine, Garden of Life, and Olly command the mentions % share on social media and blogs/ forums

BRAND - SHARE OF VOICE

/ DIRECTIONAL

Share of Voice (Dec'21 - Nov'23)



Competitor	Avg. share of voice (Dec'21-Nov'23)
Sunshine	23%
Garden of Life	22%
OLLY	22%
HUM Nutrition	17%
Zarbee's	9%
Smarty Pants	8%

Note: Includes brand-name mentions on social media platforms including Facebook, Instagram, X/Twitter, in addition to online blogs and forums  
Source: NetBase scrape

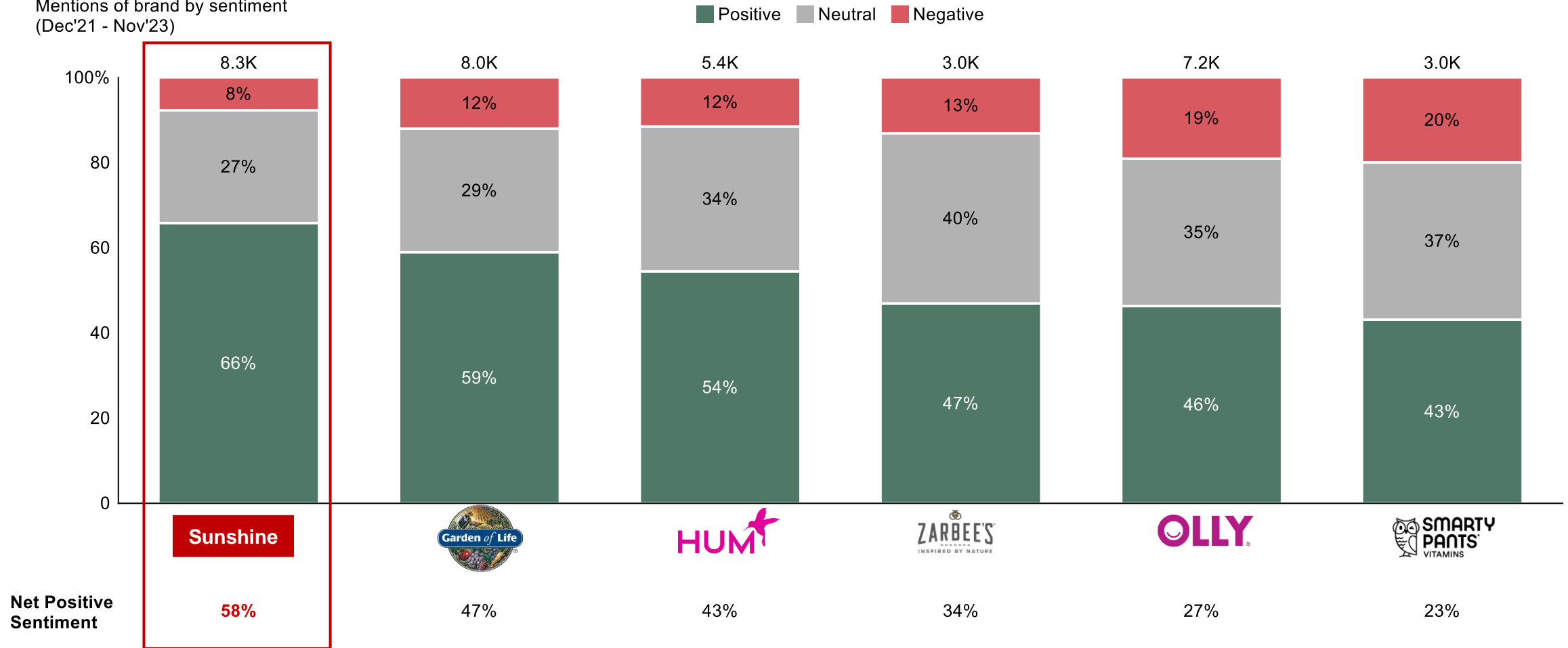
# Sentiment: Sunshine ahead of the competition with a ~60% net positive score; Garden of Life follows in #2

SOCIAL MEDIA

SENTIMENT

/ AI-ANALYSIS, DIRECTIONAL

Mentions of brand by sentiment  
(Dec'21 - Nov'23)



Note: Includes brand-name mentions on social media platforms including Facebook, Instagram, X/Twitter, in addition to online blogs and forums; Sentiment tagging by Netbase AI  
Source: NetBase scrape

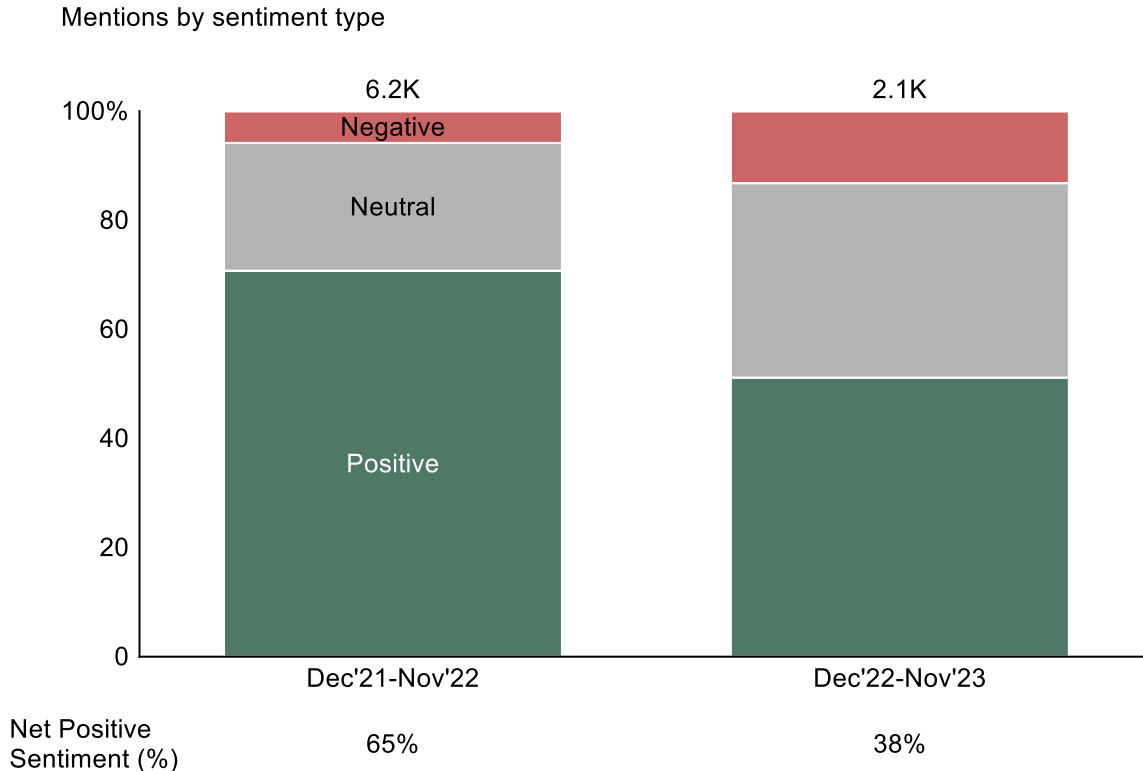
# Sentiment | Sunshine: Promoters cite satisfaction with effectiveness, quality, and ease of consumption; taste and value for money cited more by detractors

SOCIAL MEDIA

SENTIMENT

/ AI-ANALYSIS, DIRECTIONAL

## Sentiment evolution



Note: Includes brand-name mentions on social media platforms including Facebook, Instagram, X/Twitter, in addition to online blogs and forums; Sentiment tagging by Netbase AI  
Source: NetBase scrape

## Commentary

### Taste

"Customer service is awful; the **taste is worse than awful**- I was very excited about the vitamins and bought a wide variety- **each was worse than the other.....**"

"I want to like the **taste, but it doesn't do it for me !** Please make a chew ,spray or gummy with magnesium!."

### Value for Money

"They **are ok** for what they are but **not worth the price.**"

"This product is ok, but it is **expensive** and there are not as many servings as u would think for such a large bottle. .... It's ok if you need this sort of product, but I **don't see enough benefit** to warrant buying it again"

### Effectiveness

"This is a great women's daily. I **notice a difference when I am taking these versus when I am not!** I recommend these!"

"These gummies are a **terrific way to boost your collagen consumption** if you're looking for a simple and scrumptious way to do so"

### Quality of ingredients

"what I like about the product: - **less sugar** than other gummy vitamins - **Good quality ingredients and non-gmo.....** "

"Fantastic products, pure, high quality, **no fillers or Toxic ingredients.** Excellent company."

### Ease of consumption

"This is a good brand. They are **easy to swallow** with no taste or aftertaste. I can't always tell if/when a probiotic is working but I've used other supplements in this brand before and **I trust it.**"

"Sunshine's vitamins are the best choice for my family..... **The liquid vitamins are really easy to consume!....**"

## A G E N D A

Consumer sentiment - Amazon

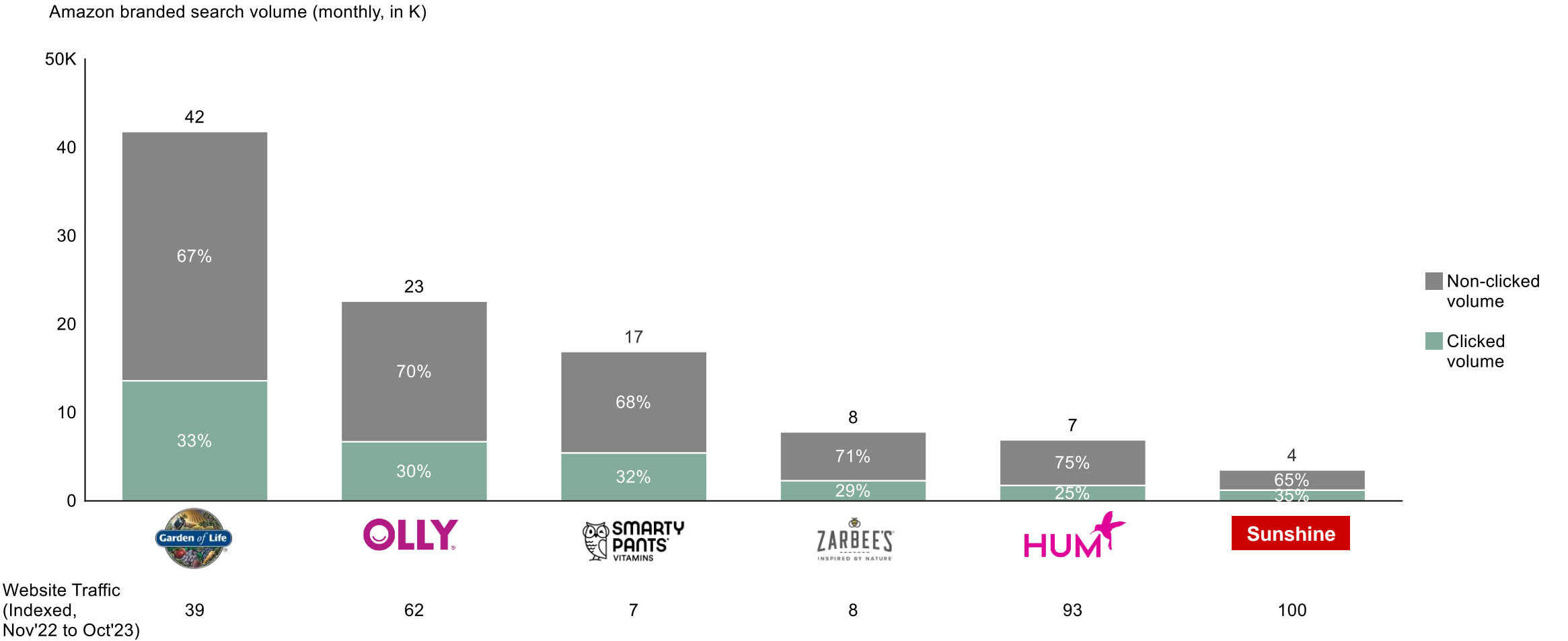
---

Sentiment - Social media

---

**Positioning/ optimization - Amazon**

# Amazon – brand search: Sunshine lags competition on brand-intent search; Garden of Life leads



Note: Amazon search volume is an estimation of the average monthly number of searches for a keyword; Clicks refer to the number of clicks on the search results; Total search volume for a brand is a sum of top 3 keywords by search volume containing the brand's name (standalone brand name (accounted for spelling variations) + top 2 VMS category related brand keywords) | Source: Ahrefs

# Amazon search: Sunshine is middle of the pack on unbranded VMS industry keywords; scope to invest in sponsored listings; Garden of Life leads <sup>(1/2)</sup>



AMAZON SEARCH

/ DIRECTIONAL

Keyword	Est. monthly search volume on Amazon US	Sunshine	Garden of Life	OLLY	SMARTY PANTS VITAMINS	ZARBEES INSPIRED BY NATURE	HUM
<b>multivitamin for men</b> <small>Other brands making an appearance: Centrum &amp; Naturelo</small>	46,000	-	5	-	1	-	-
<b>multivitamin</b>	39,000	1	1	2	4	-	-
<b>calcium supplement</b> <small>21st Century &amp; Pure Encapsulations</small>	38,000	-	2	-	-	-	-
<b>multivitamin for women</b> <small>Nature Made &amp; One Day</small>	24,000	1	5	2	3	-	-
<b>liposomal vitamin c</b>	21,000	1	2	-	-	-	-
<b>womens multivitamin</b>	11,000	1	3	2	2	-	-
<b>biotin gummies</b>	7,400	1	-	-	-	-	2
<b>probiotic gummies</b>	7,100	-	1	4	-	-	-
<b>vegan multivitamin</b>	4,900	2	1	-	2	-	-
<b>biotin supplement</b> <small>Nature Made &amp; Nature's Bounty</small>	4,500	-	-	-	-	-	-
<b>womens probiotic</b>	3,700	1	4	-	-	-	-
<b>multivitamin gummies</b>	3,600	-	1	1	-	-	-
<b>vitamin d gummies</b> <small>Nordic Naturals &amp; Vitafusion</small>	3,600	1	-	-	-	-	-
<b>liquid multivitamin</b> <small>Nature's Way &amp; Pure Encapsulations</small>	2,900	3	-	-	-	-	-
<b>kids multivitamin</b>	2,700	1	2	2	2	1	-

Numbers represent the N of SKU listings on 1<sup>st</sup> page of Amazon results for the respective search term.

Highest N >1 N

1 or more listings (organic or sponsored) with these badges  
 Sponsored Amazon Choice Best Seller

Note: '-' = no listing on 1<sup>st</sup> page for the respective keyword; Page 1 has ~50 product listings.; Location: NYC; Date: Dec 04, 2023 | Source: Amazon.com, Ahrefs

# Amazon search: Sunshine is middle of the pack on unbranded VMS industry keywords; scope to invest in sponsored listings; Garden of Life leads <sup>(2/2)</sup>



/ DIRECTIONAL

Keyword	Est. monthly search volume on Amazon US	Sunshine	Garden of Life	OLLY	SMARTY PANTS VITAMINS	ZARBEES	HUM
<b>chewable multivitamin</b> <small>Fusion, Nature's Way</small>	2,400	-	2	1	-	-	-
<b>mens multivitamin 50 plus</b>	2,300	-	1	-	-	-	-
<b>probiotic supplement</b> <small>Physician's choice, Renew Life</small>	2,200	-	5	1	-	-	-
<b>sleep gummies</b>	2,200	-	-	6	1	2	-
<b>multivitamin for women 50 plus</b>	1,600	-	1	-	1	-	-
<b>collagen supplement</b> <small>Centrum, Youtheory, Vital Proteins</small>	1,600	-	1	-	-	-	-
<b>multivitamin for kids</b>	1,500	2	5	2	5	1	-
<b>womens multivitamin gummies</b>	1,500	-	1	1	3	-	-
<b>probiotic for women</b>	1,500	-	7	1	-	-	-
<b>organic multivitamin</b>	1,000	2	7	-	1	-	-
<b>daily multivitamin</b> <small>Amazon basics, Naturelo, One a Day</small>	1,000	-	2	-	-	-	-
<b>organic multivitamin for women</b>	900	2	7	-	5	-	-
<b>prenatal multivitamin</b>	900	-	2	2	3	-	-
<b>liquid multivitamin for women</b> <small>Nature's way, Tropical Oasis</small>	900	3	-	-	-	-	-
<b>toddler multivitamin</b>	600	3	2	1	9	1	-

Numbers represent the N of SKU listings on 1<sup>st</sup> page of Amazon results for the respective search term.

Highest N >1 N

1 or more listings (organic or sponsored) with these badges  
 Sponsored Amazon Choice Best Seller



























































































Note: '-' = no listing on 1<sup>st</sup> page for the respective keyword; Page 1 has ~50 product listings.; Location: NYC; Date: Dec 04, 2023 | Source: Amazon.com, Ahrefs

# Sunshine is strong on product/ purchase-stage metrics; scope to improve discoverability via sponsored ads & better organic positioning on industry keywords

## FUNNEL / OPTIMIZATION

## AMAZON



	Metric	Sunshine	Garden of Life	OLLY	SMARTY PANTS VITAMINS	ZARBEE'S INSPIRED BY NATURE	HUM	Explanation
SEE (off-site)	Product Listing Ads (leading to Amazon)							For brand-name search on Google, Sunshine has 2 PLAs (Google Shopping Ads) that link to the product page on Amazon. Smarty Pants and Zarbee's also have 2 each, while HUM & GoL have 1 such ad each.
	Social media campaigns (Amazon co-branded)							No brand has its product advertised as a co-branding with Amazon on Facebook & Instagram ads in the last 12 months
	Google search result leading to Amazon page of brand							For brand-name search on Google, Sunshine has a search result in top 10 that leads to its listings page on Amazon. No other brand has such a result, organic or paid.
SEE (on-site)	Brand Hub/Store							All brands have a dedicated store on Amazon. It helps a brand showcase all its hero products and highlight promotions, benefits, etc.
	Display and video ads							Based on a sample of ~15 high-volume keywords, Sunshine has no media ads, while Olly and Smarty Pants lead with 3 each. Display and video ads capture immediate attention, help drive awareness & sales.
FIND (on-site)	Sponsored listings							Sunshine has no sponsored SKU on any of the 30 industry keywords analysed. Garden of Life and Smarty Pants have sponsored listings on ~10 keywords each.
	Appearance in featured brands							Based on a sample of 15 high-volume keywords, Sunshine makes an appearance in the list of brand filter ~85% of the times, similar to Garden of Life, Olly, and Smarty Pants.
	Total listings and Amazon badges							Sunshine has ~25 listings (cumulative) on top 30 VMS industry keywords, while Garden of Life leads with over 70. Sunshine is strong on "liquid", "vegan" and "organic" multivitamin keywords (2 or more listings – all organic) but has a single or no listing for other more generic VMS keywords and no Amazon badges.
	% Appearance in top-20 spots							Based on a sample of 15 keywords, Sunshine has a presence in top results (first 4 rows) for ~50% of them, similar to Garden of Life, Olly, and Smarty Pants.
BUY (on-site)	Product title & description*							Sunshine's hero SKUs have detailed product titles (using high-volume SEO keywords) and detailed product description bullet points.
	Product images and videos*							Good use of multiple high-quality images and videos by Sunshine. Pictures clearly specify supplement facts, suggested use, and benefits
	Price range distribution							On the first page results for a brand (VMS category), Garden of Life and Olly have the widest range available (~\$5 to ~\$200 for bundle/ pack SKUs). Sunshine has SKUs ranging from ~\$10 to ~\$75.
	Subscribe & Save option							~80% of the listings of Sunshine have the option to "subscribe & save" – helpful for retaining customers and building brand loyalty.
	Stock availability							~90% of Sunshine's SKU listings have no low stock or out of stock issues.
	Ratings & Reviews							Sunshine has strong customer advocacy with – 80% NPS/ 4.5 overall avg. rating across its SKUs

Note: \*Product-level metrics evaluated for top 5 'hero SKUs' of brands, in terms of their # of ratings on Amazon | Source: Amazon.com (ZIP Code of NYC), Ahrefs, Facebook Ads Library

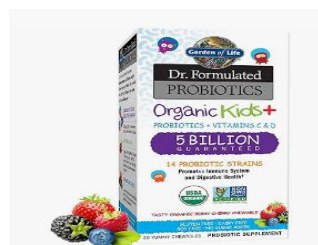


# Sunshine has scope to invest in sponsored listings and display/ video ads

## FUNNEL / OPTIMIZATION

## AMAZON

### Sponsored listings



Sponsored  
Garden of Life Dr. Formulated Probiotics for Kids, Organic Kids+ - Berry Cherry, 5 Billion CFU Chewable Probiotic Plus...



Sponsored  
OLLY Ultra Women's Multi Softgels, Overall Health and Immune Support, Omega-3s, ...



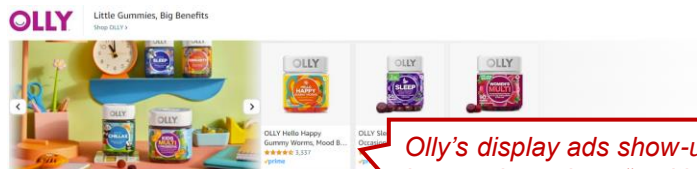
Sponsored  
SmartyPants Kids Multi & Fiber Vitamins: Daily Kids Multivitamin Gummy for...

Sunshine does not have sponsored listings on any of the high-volume industry keywords, while competitors, esp. Garden of Life and Smarty Pants, are actively investing in sponsored search ads for popular keywords



Sponsored  
Garden of Life Multivitamin for Women, Vitamin Code Women's Multi, Whole Food...

### Display and video ads



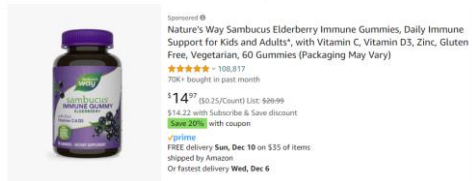
OLLY's display ads show-up for keywords such as "multivitamin gummies," "probiotic gummies," "vitamin d gummies"



Smarty Pants has ads on highly relevant keywords of "multivitamin for women," "womens multivitamin," "kids multivitamin"



Brands like Naturelo and Nature's Way show up on high-search volume keywords like "multivitamin for men," "calcium supplement", etc.



### Featured brands filter/ list

- ☐ Digestive Advantage
- ☒ OLLY
- ☐ Amazon Basics
- ☐ Nature's Bounty
- ☐ Align
- ☐ Vitafusion
- ☐ Force Factor
- ☐ New Chapter
- ☐ Physician's CHOICE
- ☐ Garden of Life
- ☐ SmartyPants
- ☒ MaryRuth Organics
- ☐ Nature's Way
- ☐ Viteey
- ☐ Lil Critters
- ☐ Nature's Nutrition
- ☐ Jarrow Formulas

Sunshine appears in featured brands list for a good number of keywords – "liquid multivitamin", "multivitamin", "probiotic gummies", "multivitamin for women" etc.

#### Featured Brands

- ☐ Nature Made
- ☐ Nature's Bounty
- ☐ Amazon Elements
- ☐ Sports Research
- ☐ Natrol
- ☐ NOW
- ☒ OLLY
- ☒ MaryRuth Organics
- ☐ Vitafusion

#### Featured Brands

- ☒ MaryRuth Organics
  - ☐ Nature's Way
  - ☐ Centrum
  - ☐ TROPICAL OASIS
  - ☐ Nature's Plus
  - ☐ LIQUIDHEALTH
  - ☐ NutraChamps
  - ☐ Floradix
  - ☐ Eniva Health
  - ☐ Garden of Life
  - ☐ Bluebonnet
  - ☐ Century Systems
  - ☐ Manna Vitamins Evolved
- See Less

Sunshine makes good use of high-quality pictures and videos, rich in useful information; product titles also descriptive

FUNNEL / OPTIMIZATIONAMAZON

Product pictures and videos



Sunshine provides multiple high-quality pictures and videos of product, above the fold. Text with features & benefits clearly visible.

Provides separate pictures for supplement facts and suggested use

### Supplement Facts

Serving Size	1-3 Years	4-13 Years	14+ Years			
Servings Per Container	1/2 tsp (2.5 mL)	1 tsp (5 mL)	2 tsp (10 mL)			
<b>Amount Per Serving</b>	<b>% DV for 1-3 Years</b>	<b>% DV for 4-13 Years</b>	<b>% DV for 14+ Years</b>			
<b>Total Carbohydrate</b>	1 g	4 g	8 g			
<b>Vitamin A (as Beta Carotene)</b>	80 mcg	28%	100 mcg	20%	1000 mcg	111%
<b>Vitamin C (Ascorbic Acid)</b>	8 mg	50%	45 mg	50%	90 mg	100%
<b>Vitamin D</b>	1.7 mcg (68 IU)	11%	15 mcg (600 IU)	30%	30 mcg (1200 IU)	100%
<b>Vitamin E</b>	1.5 mg	25%	9 mg	80%	18 mg	100%
<b>(as D-Alpha Tocopherol Acetate)</b>						
<b>Thiamin</b>	0.5 mg	100%	3 mg	250%	6 mg	500%
<b>(as Thiamine Hydrochloride)</b>						
<b>Riboflavin</b>	0.54 mg	108%	3.25 mg	250%	6.5 mg	500%
<b>Niacin (as Nicotinamide)</b>	2.7 mg	44%	16 mg	100%	32 mg	200%
<b>Vitamin B6</b>	0.71 mg	142%	4.25 mg	250%	8.5 mg	500%
<b>(as Pyridoxine Hydrochloride)</b>						
<b>Folate</b>	15 mcg DFE	28%	250 mcg DFE	64%	510 mcg DFE	128%
<b>(as Calcium L-5-Methyltetrahydrofolate)</b>						
<b>Vitamin B12</b>	1 mcg	111%	6 mcg	250%	12 mcg	500%
<b>(as Methylcobalamin)</b>						
<b>Biotin (as D-Biotin)</b>	25 mcg	833%	100 mcg	500%	300 mcg	1000%
<b>Pantothenic Acid</b>	0.8 mg	42%	5 mg	100%	10 mg	200%
<b>(as D-Calcium Pantothenate)</b>						
<b>Choline (as Choline Bitartrate)</b>	10 mg	2%	25 mg	5%	50 mg	10%
<b>(as L-Ascorbic Acid)</b>	0.1 mg	3%	0.5 mg	1%	1 mg	2%
<b>Chromium</b>	1.5 mcg	14%	8 mcg	20%	18 mcg	51%
<b>(as Chromium Picolinate)</b>						
<b>Iodine</b>	4.2 mcg	1%	25 mcg	1%	50 mcg	1%
<b>Methylsulfonylmethane</b>	2.5 mg	1%	15 mg	1%	30 mg	1%
<b>Proprietary Blend</b>	2.1 mg	1%	13 mg	1%	25 mg	1%
<b>Chain Amino Acid Complex</b>						
<b>L-Leucine, L-Isoleucine, L-Valine</b>						
<b>Iron</b>	0.8 mg	1%	5 mg	1%	10 mg	1%
<b>Neem</b>	0.4 mg	1%	3 mg	1%	6 mg	1%

Other Ingredients: Purified Water, Vegetable Glycerin, Natural Flavor, Xanthan Gum, Evaporated Sea Water, Cranberry Fruit Powder, Organic Aloe Vera Inner Leaf Extract, Organic Noni Fruit Powder, and Potassium Sorbate (to preserve freshness).

### SUGGESTED USE:

Shake well before use. Take once daily or as recommended by a physician or healthcare professional. Take in the morning either with food, juice or on an empty stomach. Do not exceed the recommended dose.

1-3 Years: 1/2 Teaspoon (2.5mL)  
4-13 Years: 1 Teaspoon (5mL)  
14 Years+: 2 Teaspoons (10mL)

SKU title and description

Multivitamin Multimineral for Women Men & Kids by MaryRuth's | No Added Sugar | Vegan Liquid Vitamins for Adults & Kids | Mens, Womens Multivitamin | Energy & Beauty Booster | Non-GMO | 32 Fl Oz

Visit the MaryRuth Organics Store

4.5 ★★★★★ 37,507 ratings | 788 answered questions

Infant Liquid Ionic Zinc with Organic Glycerin by MaryRuth's, Zinc Sulfate for Immune Support, Vegan, Formulated for Ages 0-12 Months, 1 Month Supply, 2 Fl Oz

Visit the MaryRuth Organics Store

4.7 ★★★★★ 15,008 ratings | 100 answered questions

MaryRuth's Elderberry Syrup | USDA Organic Elderberry | Sugar Free Adults & Kids Immune Support Supplement for Ages 1+ | Clean Label Project Verified®, Vegan, Non-GMO, Gluten Free | 1 Fl Oz

Visit the MaryRuth Organics Store

4.7 ★★★★★ 14,391 ratings

Sunshine has detailed product titles containing keywords such as "vegan," "Non-GMO," "Gluten free," "no added sugar", etc. which help with the product SEO as well as build confidence among potential/ first-time buyers.

Item Form	Syrup
Brand	MaryRuth Organics
Age Range (Description)	Child, Adult
Diet Type	Gluten Free
Material Feature	USDA Organic   Non-GMO   Vegan   Made in a GMP Facility

- About this item
- Elderberry Syrup: Elderberries, the fruit of Elder shrubs, have been used for generations to support the immune system.\* Even Hippocrates of ancient Greece touted its healthful benefits! Enjoy our delicious organic elderberry in liquid form.
  - Ultimate Immune Support Supplement: Receive the benefits of elderberry extract by easily taking it by mouth or adding it to your favorite beverage. You can even add it to our MaryRuth liquid morning multivitamin or your favorite herbal tea!
  - A Formula You Can Trust: MaryRuth's is B Corp Certified and Clean Label Project Verified! Our elderberry immune boosters for adults and immune support for kids are made with Organic European Elder Berry Extract.
  - Easy-to-Take Liquid Drops: Dosage chart: 1 - 3 years: Up to 7 drops (35 mg), 4 - 13 years: 15 drops or 1/2 dropper (75 mg), 14 years and up: Up to 30 drops or 1/2 dropper (150 mg), For Intensive Use: Up to 4 times daily.
  - For Most Lifestyles: Maryruth's Elderberry Syrup is USDA Organic, Non-GMO, Vegan, Made in a GMP Facility, Dairy Free, Nut Free, Gluten & Wheat Free, Soy Corn Free, Sugar Free. Safe for ages one and up. Each bottle contains 30-120 servings.

Example of product description from Sunshine: Detailed text-based explanation with ingredients and dosage

Source: Amazon.com (ZIP Code of NYC)

