

A top-down view of various cosmetic and skincare products arranged on a dark green background. The products include a white tube, a white pump bottle, a clear bottle with yellow liquid, a white box, a copper-colored tube, a black compact with two shades of powder, a brush, several small jars of cream or powder in various shades of red, orange, and yellow, a large round jar of white cream, and a pink and blue packet. The Navigo Marketing logo is in the bottom left corner.

Key Takeaways

Performance Trends

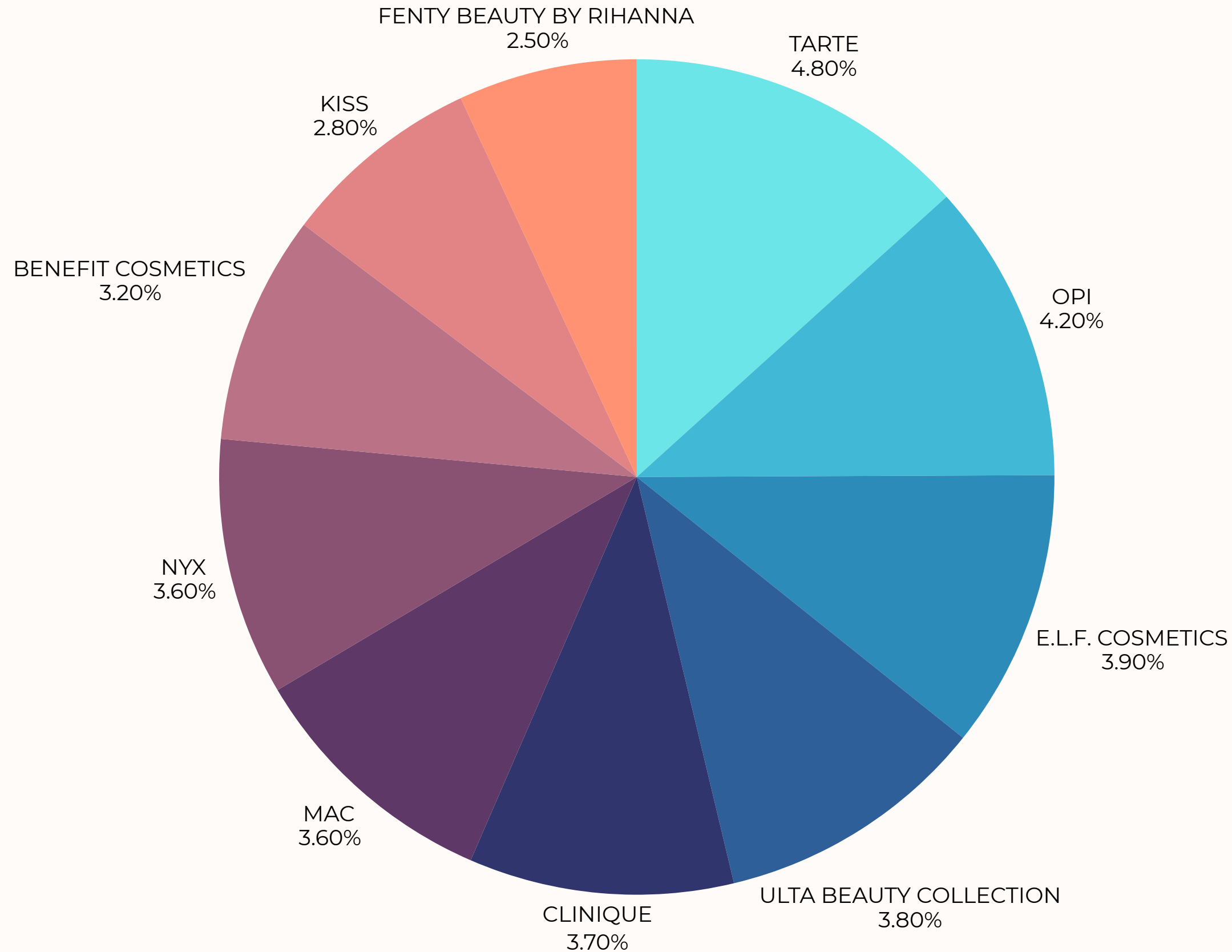
- **Concentration = Opportunity:** The event rewards scale, but smaller challengers can win by finding white space in under-leveraged subcategories.
- **Margin Over Volume:** Growth isn't equal across categories—premium categories like fragrance and skincare drive higher profitability potential.
- **Investment Imperative:** Success isn't organic, brands that dominate also spend. Strategic ad dollars are non-negotiable.
- **Unify Your Channels:** Treat Ulta's event as part of a full-funnel strategy, not a silo. Without integrated data, you're underestimating true ROI.
- **CEO Action Point:** To unlock share, simplify your partner ecosystem, align investments across retail + DTC, and insist on measurable, unified results.

Makeup

Top Brands in the Makeup Category



Makeup Share of Sales



Top Movers

Increases

- Ulta Beauty: +1.2%
- Morphe: +0.7%
- Dibs Beauty: +0.6%
- Benefit: +0.5%
- Loreal: +0.5%

Decreases

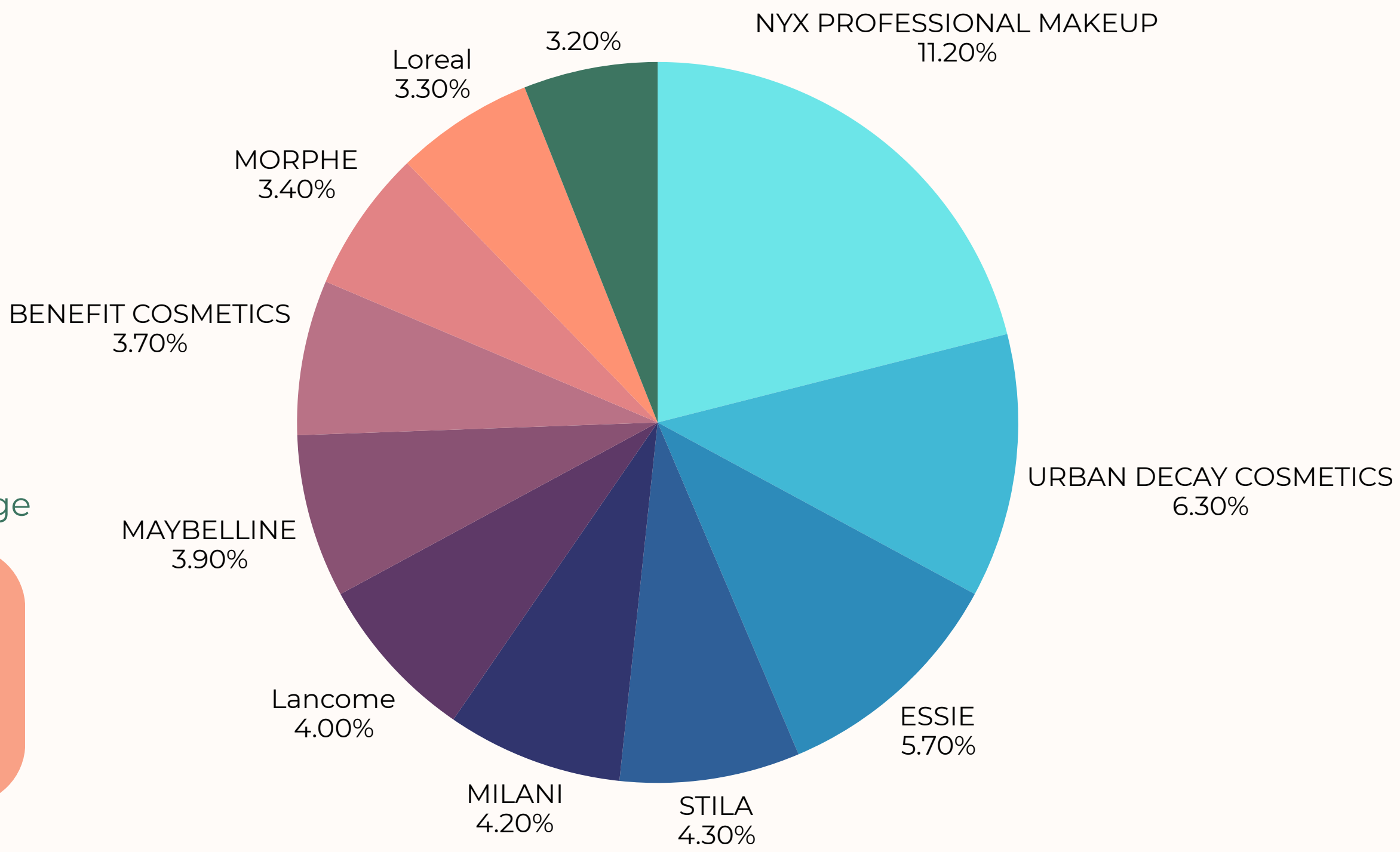
- Dashing Diva: -0.8%
- Urban Decay: -0.7%
- Sally Hansen: -0.6%
- Anastasia BH: -0.6%
- Essie: -0.6%

Makeup Advertising Activity

Top 10 Brands Share

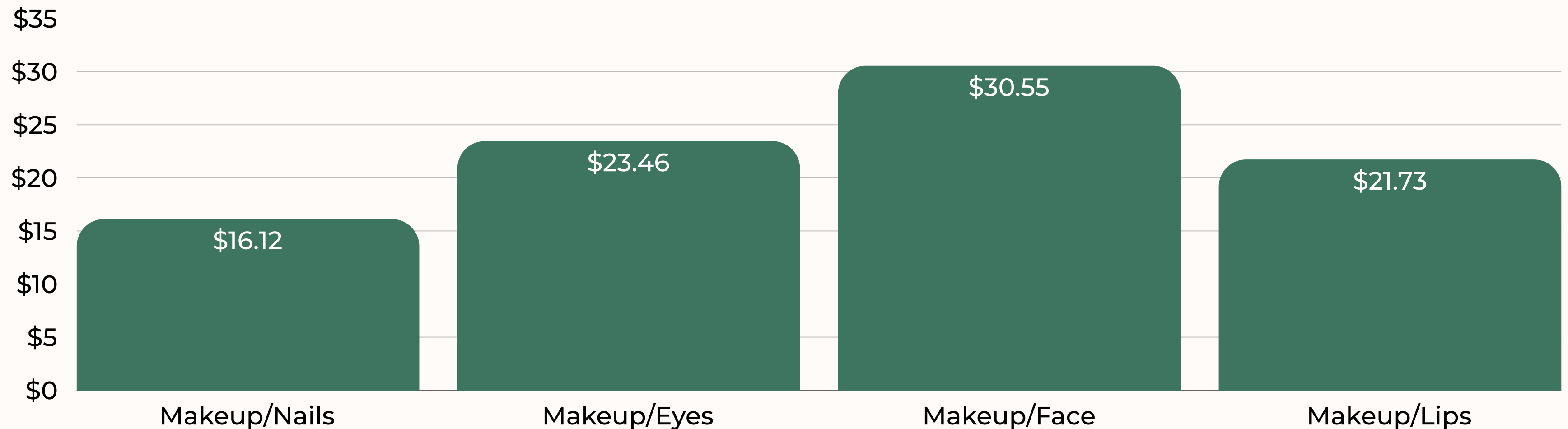


Year over Year Change



Makeup Category Average Price

Average price point in the Makeup category is \$22.91

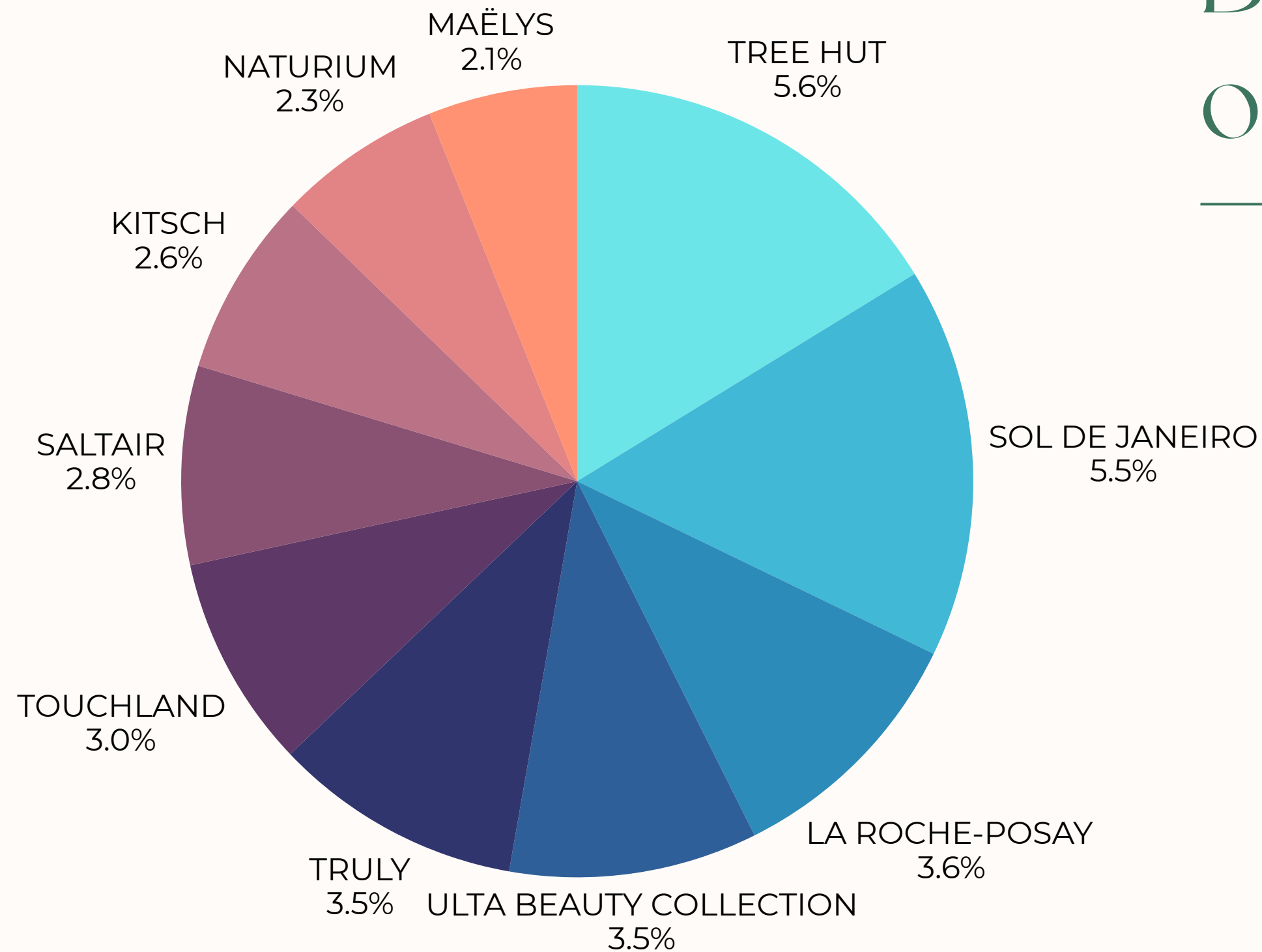


Body Care

Top Brands in the Body Care Category



Body Category Share of Sales



Top Movers

Increases

- Sol De Janeiro: +2.4%
- Truly: +2.2%
- Moon: +1.3
- Tree Hut: +1.1%
- Naturium: +0.8%

Decreases

- Touchland: -2.5%
- Dr. Teals: -2.2%
- Earth Thera: -1.8%
- Sun Bum: -1.3%
- Vacation: -1.2%

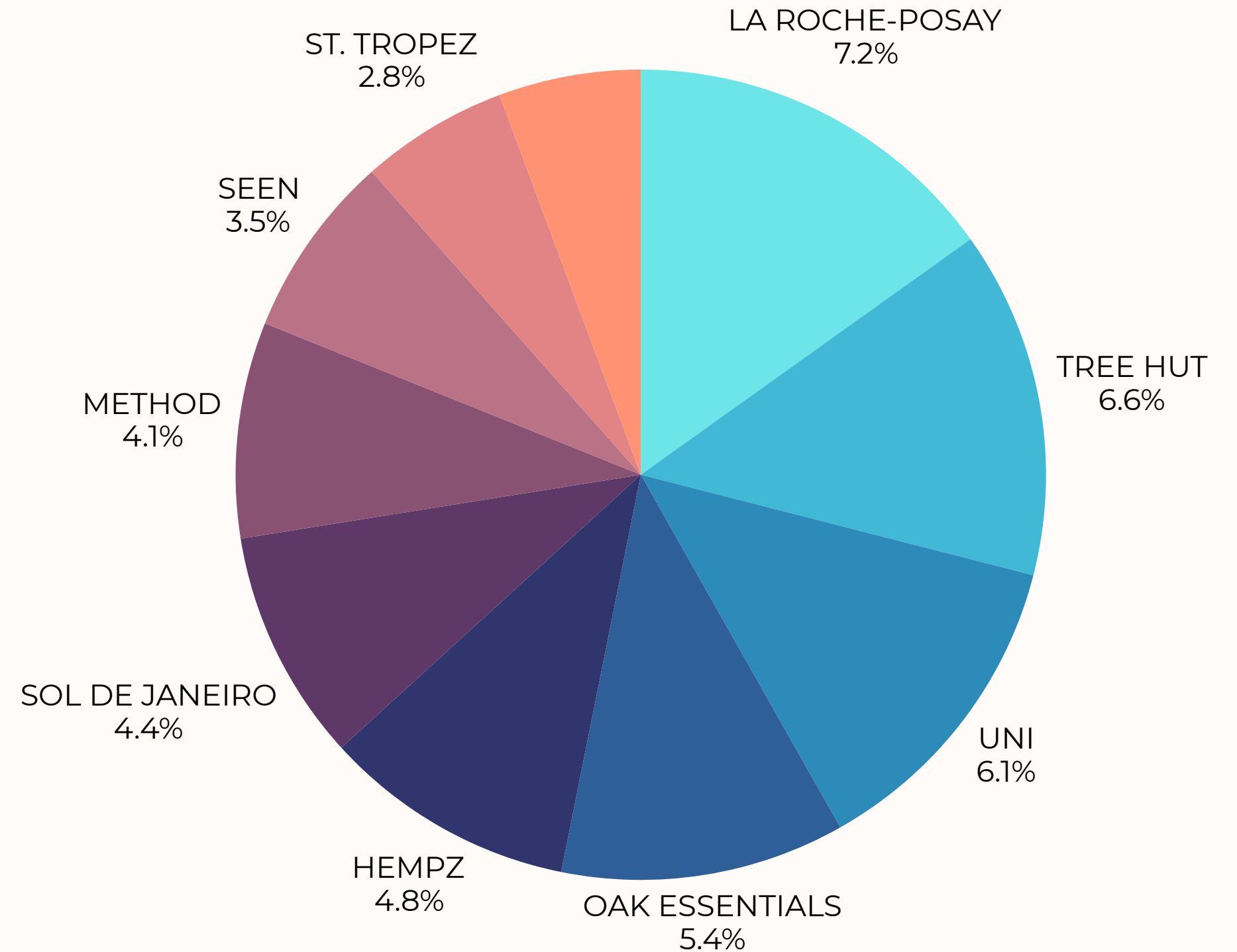
Body Advertising Activity

Top 10 Brands Share

48%

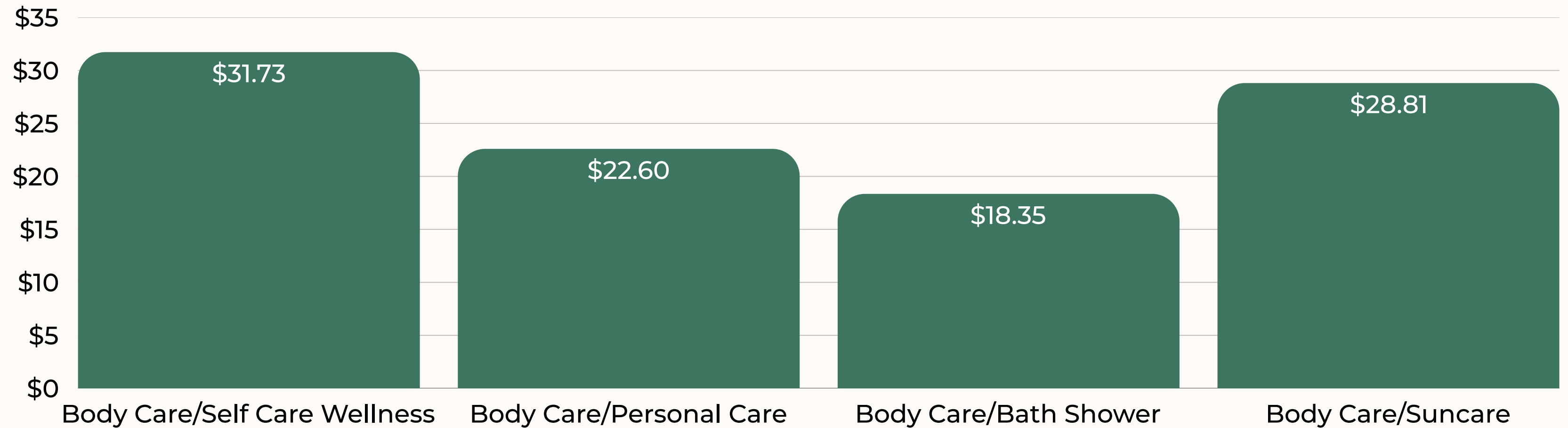
Year over Year Change

+7%



Body Category Average Price

Average price point in the Bath & Body category is \$25.37

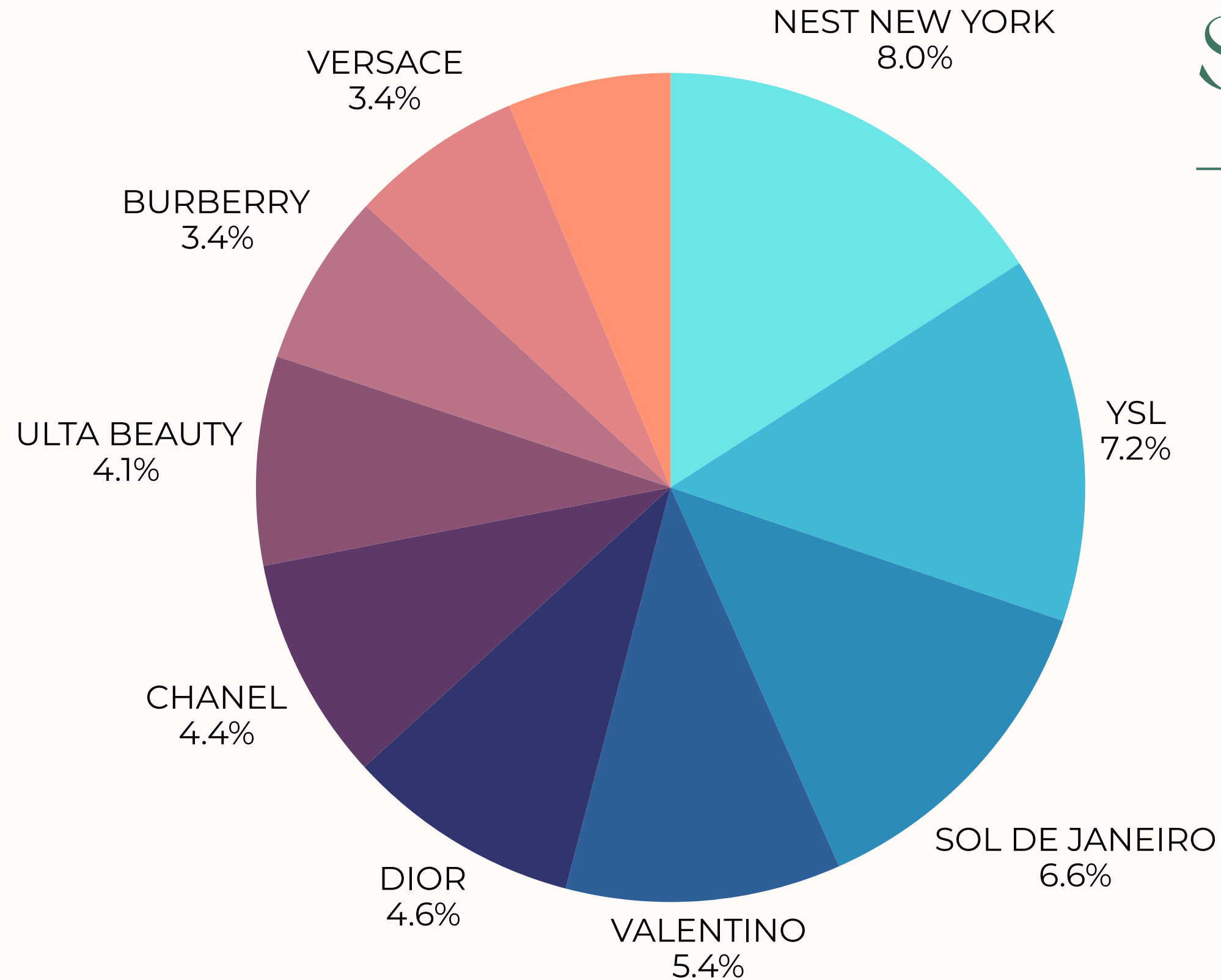


Fragrance

Top brands in the Fragrance category



Fragrance Category Share of Sales



Top Movers

Increases

- Nest New York: +5%
- Ulta Beauty: +4%
- Sol De Janeiro: +2.5%
- Noyz: +1.7%
- Valentino: +1.3%

Decreases

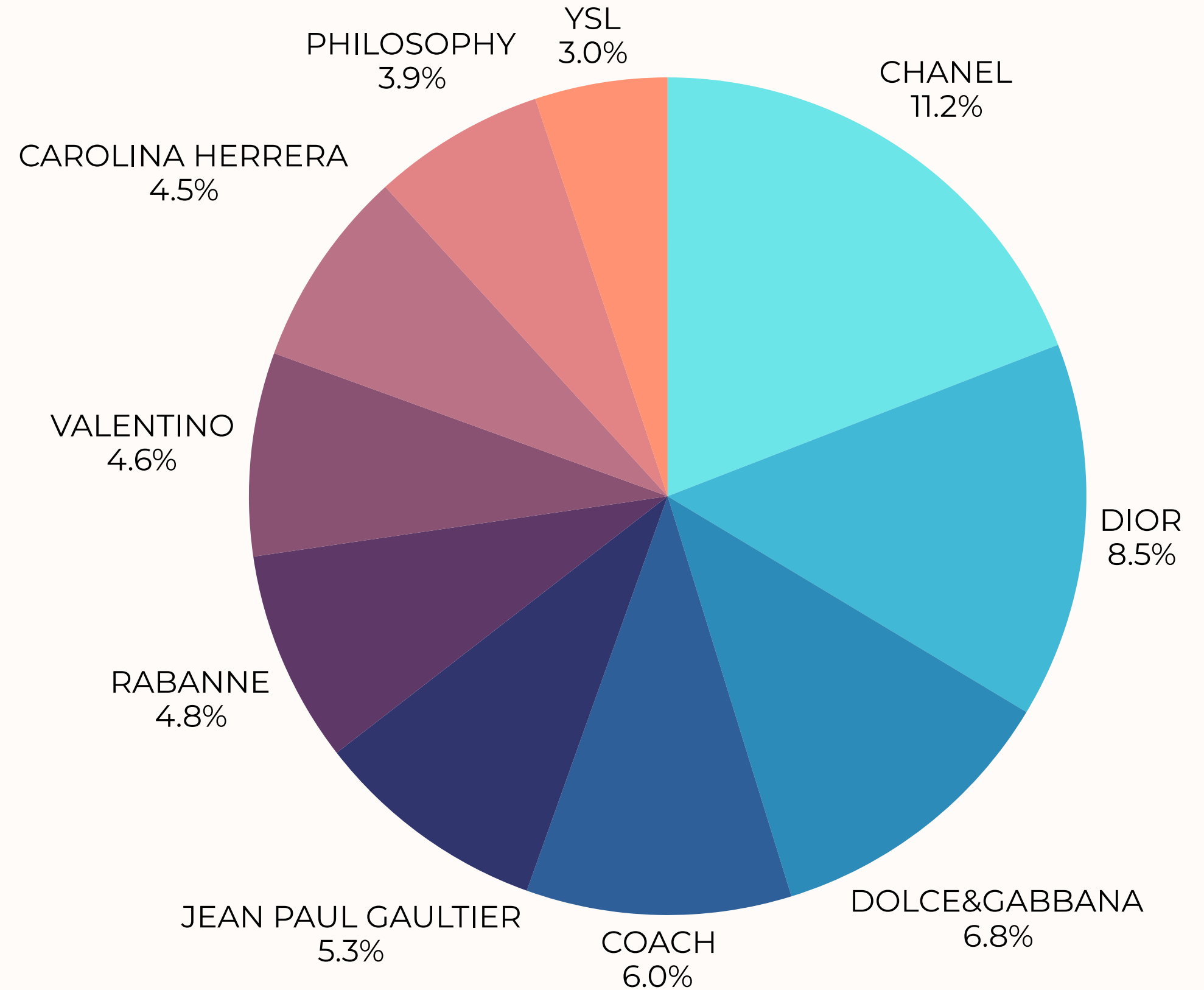
- Chanel: -3.5%
- Ariana Grande: -3.1%
- Burberry: -2.3%
- Philosophy: -2.3%
- Versace: -2%

Fragrance Advertising Activity

Top 10 Brands Share

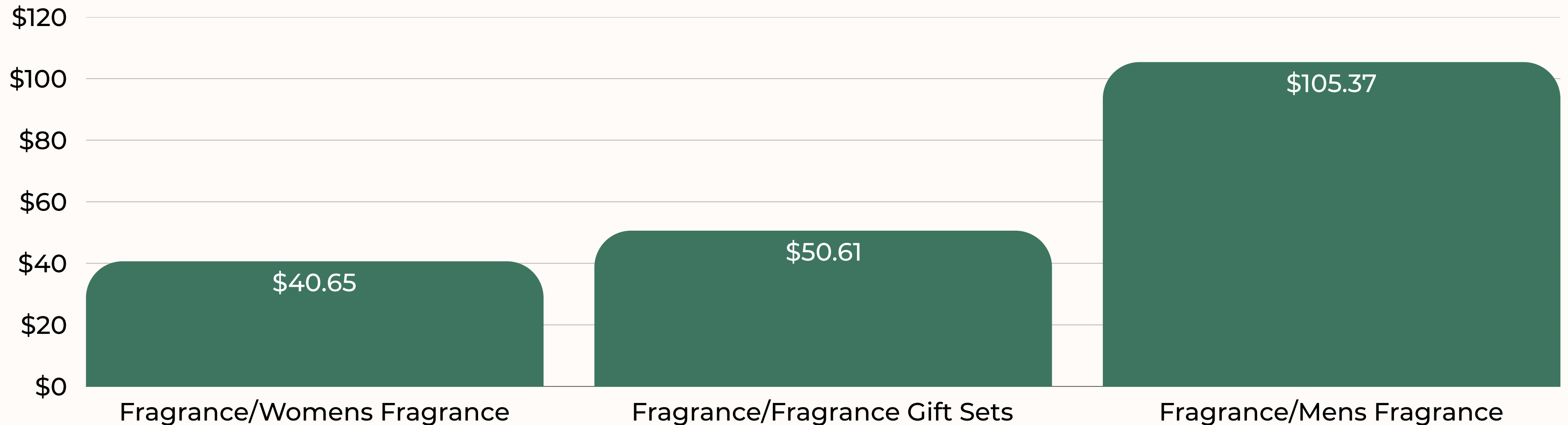


Year over Year Change



Fragrance Category Average Price

Average price point in the Fragrance category is \$65.55

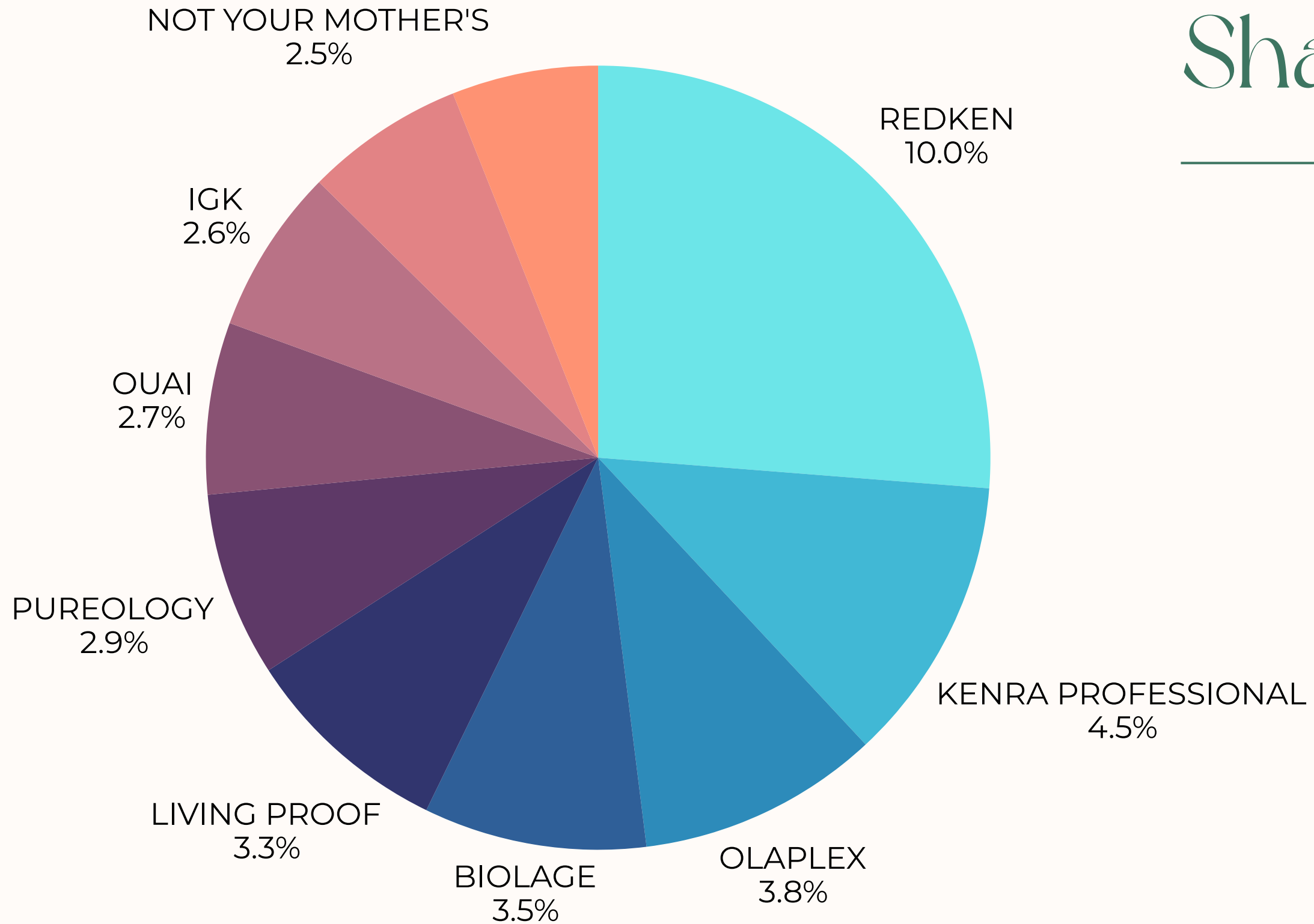


Hair Care

Top brands in the Hair Care category



Hair Category Share of Sales



Top Movers

Increases

- Not Your Mother: +1.1%
- Divi: +0.9%
- Rizos Curls: +0.8%
- Pattern: +0.8%
- Olaplex: 0.7%

Decreases

- Color Wow: -3.2%
- Curlsmith: -2.2%
- Nioxin: -1.4%
- Bondi Boost: -1%
- Paul Mitchell: -0.9%

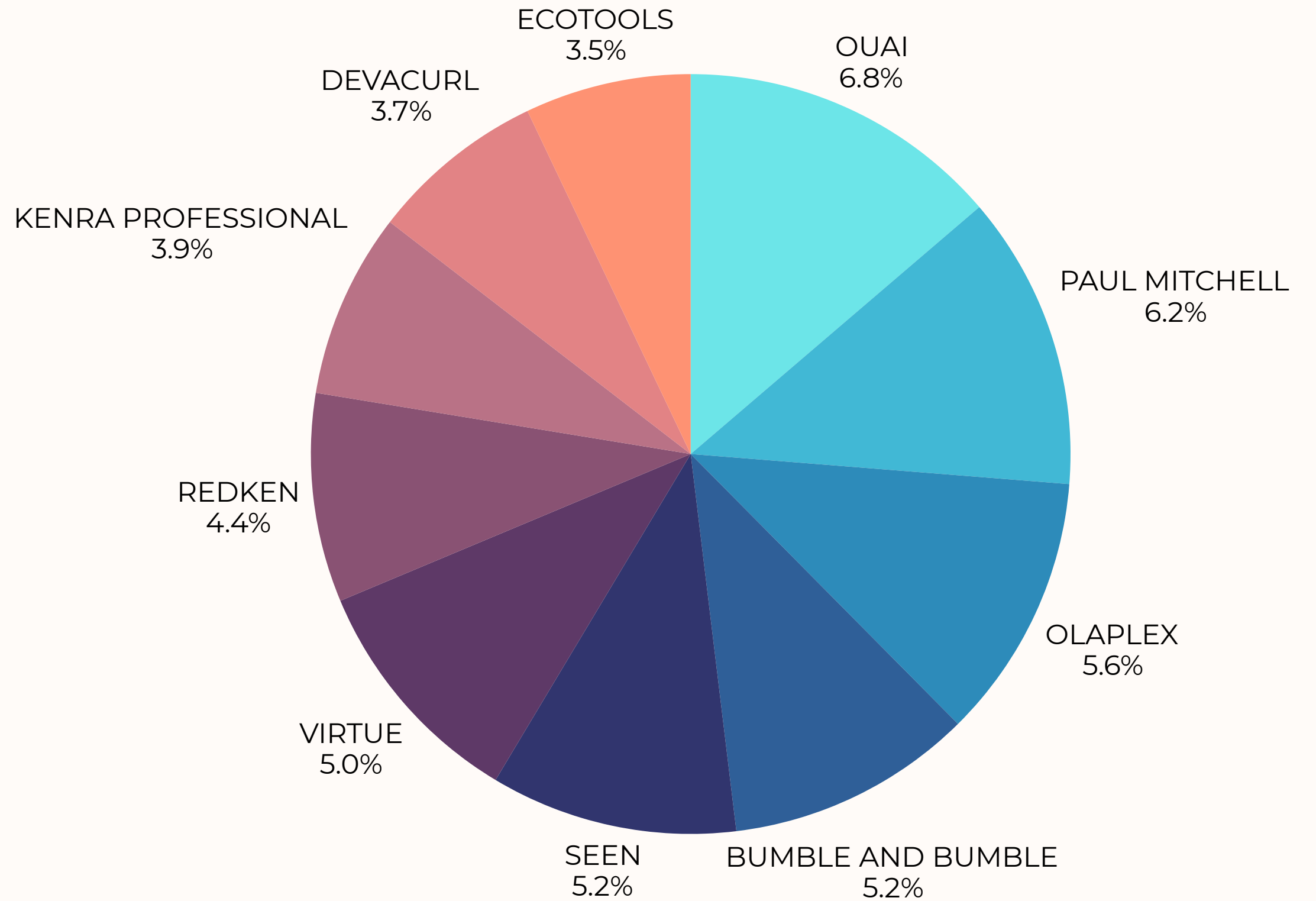
Hair Advertising Activity

Top 10 Brands Share

49%

Year over Year Change

+8%



Hair Category Average Price

Average price point in the Hair category is \$25.70

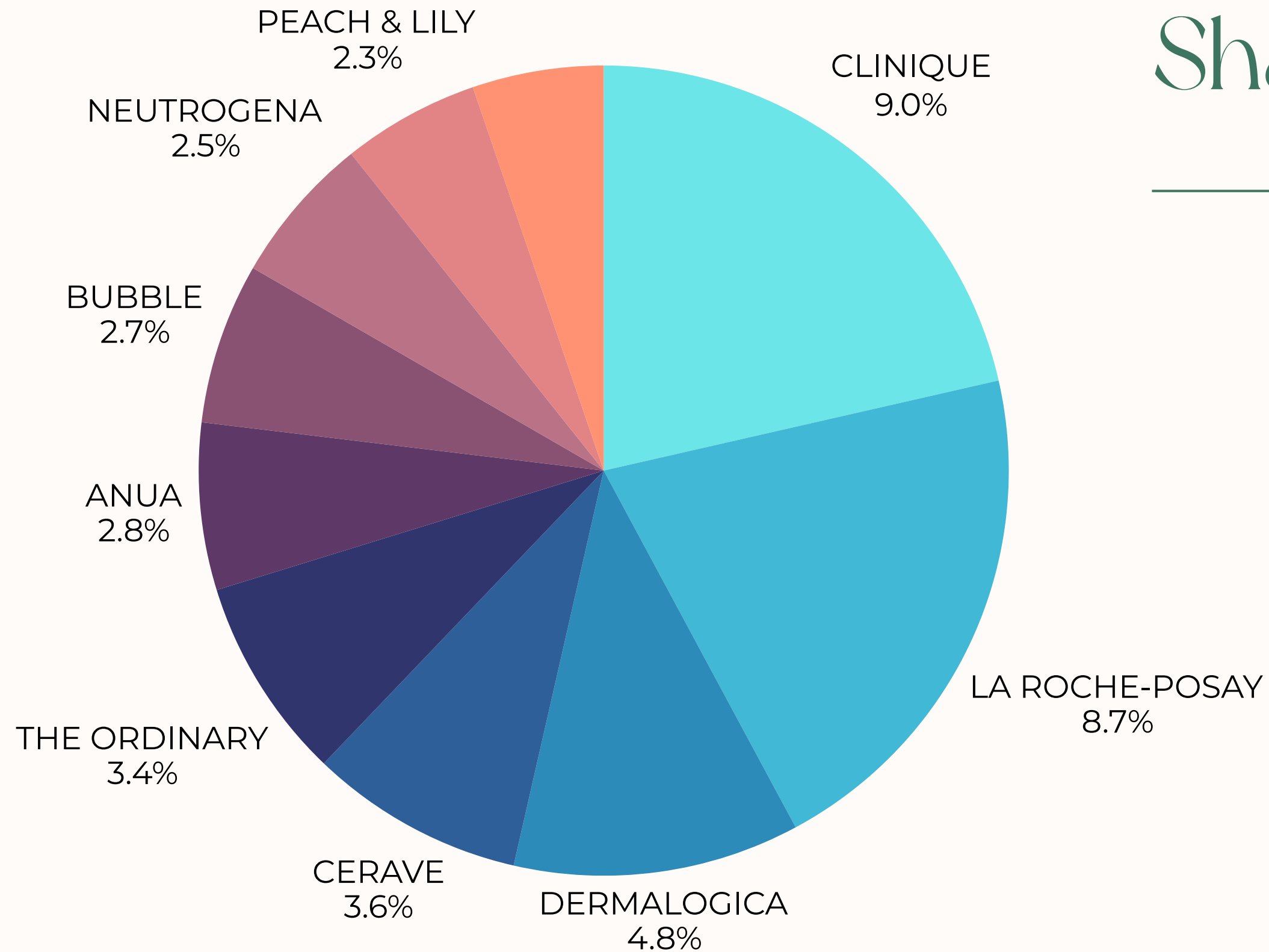


Skincare

Top brands in the Skincare category



Skincare Category Share of Sales



Top Movers

Increases

- LaRoche Posay: +3.1%
- Clinique: +1.7%
- Bubble: +1.7%
- Hero: +0.8%
- Byoma: +0.7%

Decreases

- The Ordinary: -2%
- Cosrx: -1%
- Maelys: -0.9%
- Pacifica: -0.9%
- Peach & Lily: -0.9%

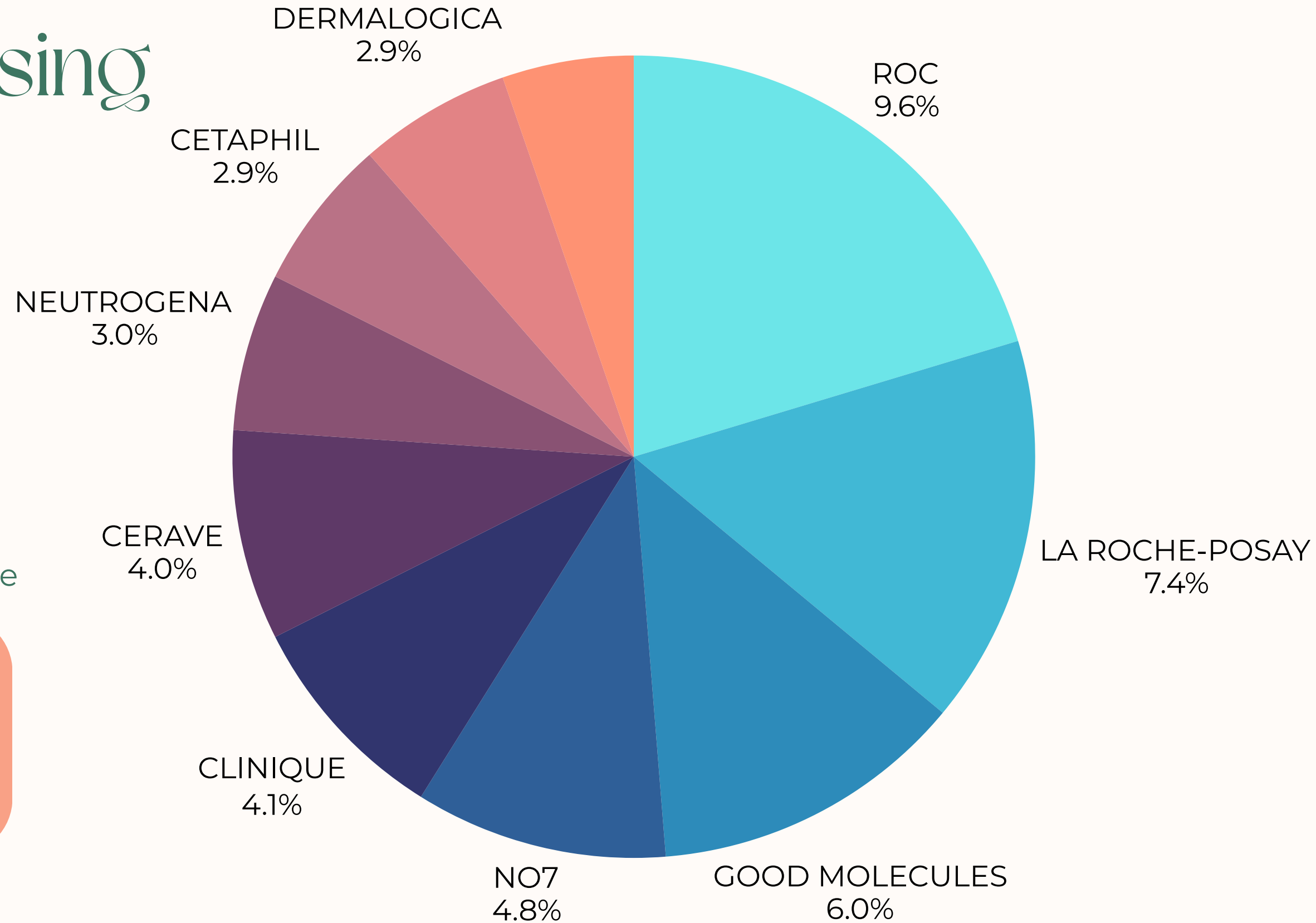
Skincare Advertising Activity

Top 10 Brands Share

47%

Year over Year Change

+35%



Skincare Category Average Price

Average price point in the Skincare category is \$30.84



Why Multi-Channel Integration Wins

- Paid social lifts sales across all channels:
 - Ulta
 - Sephora
 - Amazon
 - TikTok Shop
 - brand.com
- Without unified data, brands do not see the full impact of growth



Customer Journey



DEMAND GENERATION

Introduce the brand to new audiences.



CRITEO

SEPHORA

NURTURE & EDUCATE

Nurture people already aware of the brand and push them toward buying.



brand.com

PURCHASE

Drive purchase and repeat business.



Who We're Built For

We partner with beauty brands ready to invest in cross-channel growth, companies that have strong product-market fit but untapped audiences. Our model is especially valuable for **brands looking to simplify their partner ecosystem**, reduce complexity, and see measurable, unified results.

Navigo

MARKETING

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