



Vibes Are Out, Results Are In

Function Over Flash

In Q1 2025, beauty shoppers made one thing clear. Results matter more than ritual. Across Amazon, Ulta, and Sephora, skincare products rooted in clinical ingredients and measurable claims outperformed brands that lead with story and aesthetics.

This shift is not just about branding. It is behavioral. And it is showing up across search trends, product pages, reviews, and share of sales.

What's Selling: Ingredients and Efficacy

The top skincare products across all three platforms share a common pattern. They lead with function.

On Amazon, bestsellers include stem cell serums, collagen peptides, and vitamin C treatments. These products use clear, benefit-led titles and highlight ingredient

strength. Consumers are choosing straightforward, clinical solutions that promise visible results.

At Ulta, The Ordinary continued to lead, gaining share across hydration and treatment categories. Naturium and Peach and Lily also saw growth through ingredient-forward SKUs like niacinamide and peptides. Lifestyle-led brands lost momentum or remained flat.

At Sephora, Dr. Jart and Paula's Choice gained share with high-performance, treatment-based products. Across the board, shoppers are moving toward brands that deliver clear and credible results.

Storytelling is No Longer Enough

Narrative-first brands are being outpaced. Ethereal branding and emotional positioning can drive interest, but they are no longer leading in sales share.

Top product pages emphasize clinical language. Phrases like “clinically tested,” “visible results,” and “X percent improvement in four weeks” appear frequently. Story-driven brands tend to focus on tone and lifestyle but lack the proof points today's shopper expects.

Search Trends Show a Smarter Consumer

Amazon search data confirms the shift. High-growth queries include:

- stem cell serum for face
- niacinamide serum
- korean skin care
- vitamin c serum
- SPF lip balm

What is missing are terms like glow, dewy, or clean girl. Shoppers are searching for ingredients, product types, and outcomes. This signals a more functional, results-focused mindset.

Reviews Echo the Same Priorities

In top-reviewed products, shoppers mention improvements in redness, texture, breakouts, and clarity. They are talking about what changed, and how fast. While scent or packaging may still get mentions, they are not the reason for five-star reviews.

What Brands Should Do Now

In 2025, function leads. Brands that win are the ones that:

- **Highlight hero ingredients with proven benefit**
- **Use clear and confident product messaging**
- **Show results through before and after's, reviews, or testing**
- **Focus on performance, value, and trust**

Storytelling is still valuable, but it must be backed by evidence. Beauty shoppers are not choosing between function and flash. They expect both, but function needs to come first.

How Navigo Can Help

At Navigo, we help beauty and wellness brands grow where it matters. From Amazon to Ulta to Sephora, we combine data-driven strategy, performance marketing, and platform-specific expertise to drive results across every major retailer. Whether you're launching a clinical line or repositioning an existing brand, our team knows how to turn efficacy into impact.

