



Navigo

MARKETING

Sephora vs Ulta: Spring
Haul Momentum

Spring Haul 2025: Who
Sustained the Win

The Brands Turning a Promotional Spike Into Real Momentum

In April, we published Spring Haul 2025: Who won the spring sales event. The article was picked up by multiple publications and helped frame one of the clearest platform shifts we have seen in years. Ulta was winning with full-funnel execution. Sephora was leaning heavily on paid just to stay seen. Brands were navigating diverging traffic curves, and Spring Haul became the first stress test of the year.

But as always, the real test came after. One month out, the question is not who spiked during a promotion. It is who turned that moment into repeatable growth.

To find out, we pulled performance data from May 1 through May 15 and compared it to the first half of April. The story that emerged is one of brand discipline, platform structure, and whether promotional exposure led to something more.

Ulta: Momentum That Carried

Ulta.com did not fade post-event. In fact, it kept building. **Organic search visibility rose more than nine percent in May.** Sponsorship activity jumped another twenty two percent. Core categories like face makeup, lips, and skincare held volume and rank, showing that shopper behavior extended well past the discount window.

NYX Professional Makeup remained one of the most visible brands on site. Lip IV Hydrating Gloss Stain stayed in high rotation, both organically and through continued sponsorship. Clinique and La Roche-Posay also held strong, supporting their hero SKUs with keyword coverage and steady bestseller performance. These were not momentary appearances. These brands had architecture in place.

One standout was ROC. The brand surged to over five percent of all sponsorship activity in May, dominating high-value search terms related to retinol and skincare. ROC did not just show up for Spring Haul. They kept showing up every single day afterward, and shoppers responded.

Sephora: Event Lift, Then Decline

Sephora's post-event results told a softer story.

Organic search visibility declined by nearly five percent. Sponsorship activity fell by twelve and a half percent. And while select brands held position, the overall picture was one of retraction.

Tatcha and The Ordinary were two brands that managed to grow their paid presence in May. They held onto core skincare terms with volume and consistency. Charlotte Tilbury and Glow Recipe posted modest gains in sales share, but **those gains were closely tied to continued media spend. Without it, placements were quick to slip.**

Other brands that had spiked during the Sephora Spring Savings Event saw visibility fall away entirely. SKUs that had ranked in the top ten were no longer surfacing. For these brands, the lift was limited. It came, it peaked, and it left.

The difference was not the product. It was the plan.

What This Means for Brands

Promotions are a spark. But post-event momentum depends on structure. The brands that continued to grow in May had media layered on top of optimized PDPs. They owned functional search terms with high shopper intent. They understood that discovery might start on TikTok or email, but conversion happens on platform.

They also recognized that the most valuable buyer is not the one who clicks once. It is the one who comes back. **And that second cart only happens when the product is still visible after the event ends.**

This is not about who launched something new. It is about who built something that stuck.

How Navigo Helps Brands Win on Ulta and Amazon

At Navigo, we build channel strategies around real shopper behavior. For most brands in 2025, that means showing up with clarity and consistency on Ulta and Amazon, two platforms that now drive the bulk of beauty discovery, trial, and repeat purchase.

We don't just launch listings. We develop platform-native strategies that align with how each retailer moves product. On Amazon, that means building for speed, trust, and search-driven conversion. On Ulta, it means positioning for loyalty-driven behavior, promotion alignment, and shopper spend optimization.

Our team works across the full stack—SKU selection, PDP design, paid media structure, and retail readiness—to help brands capture volume without losing margin. We use performance data, search insights, and real-time category shifts to adapt fast, optimize often, and scale smarter.

If your product deserves to be where beauty is actually bought, we'll help you get there. With the right plan, the right formats, and the right visibility to win.



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