Navigo
MARKETING

Sephora vs Ulta Spring Sale 2025

Data-Driven Insights

Spring Haul 2025: What Ulta and Sephora Are Telling Us About the Future of Beauty Retail

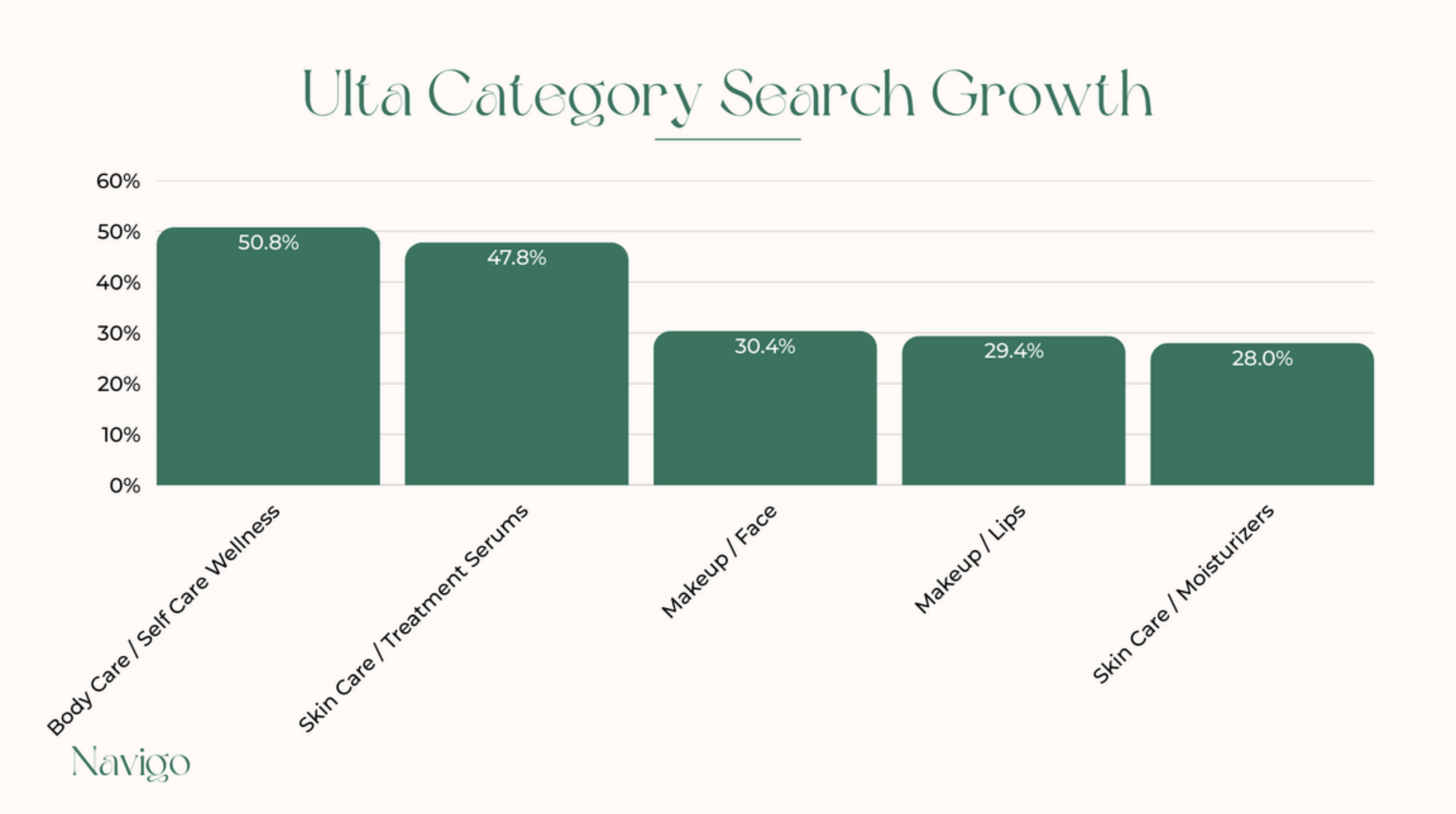
Spring Haul season is always a key moment in the beauty retail calendar. It gives us an early look at shifting consumer behavior, retailer strategy, and brand momentum across platforms. This year, with Ulta and Sephora activating promotions at the same time and Amazon building its own event calendar, the dynamics are changing fast.

We analyzed the full performance of Ulta's Spring Haul and the first week of Sephora's Spring Savings Event. What emerged is a clear divide in performance and positioning. Ulta is accelerating with a full funnel strategy that is delivering growth. Sephora is showing signs of category softness and heavier dependence on paid media just to maintain visibility.

If you are a beauty brand planning for the rest of 2025, this data is the signal. Paid media is working. Ulta is where brands are scaling right now. And this is the moment to invest.

Ulta.com Is Gaining Share with Paid Media and Retail Search Strategy

Ulta's Spring Haul drove strong results across both search and sales. Compared to the same seven day stretch in 2024, organic visibility was up 11% and paid media activity grew 131.8% year over year.



The performance was not limited to one category. Body care grew more than 50%. Treatment serums were up 47.8%. Face makeup climbed over 30%. This was driven by smart, product led advertising strategies aligned with consumer search demand.

Top brands included Clinique, Redken, Sol de Janeiro, The Ordinary, and NYX Professional Makeup. NYX stood out with 5.7% of all sponsorship share, the highest among all brands. Their Lip IV Hydrating Gloss Stain was the most visible sponsored product in makeup and one of the event's best sellers.

What worked on Ulta was clear. Brands that supported their hero SKUs with media, especially across functional, concern based search terms, saw real lift. This is not about throwing a budget at impressions. It is about owning visibility in the places shoppers are actually looking.

Sephora's Early Event Data Shows a More Challenging Story

Sephora's Spring Savings Event is still in progress, but early data from April 4 to April 9 shows that visibility is under pressure.

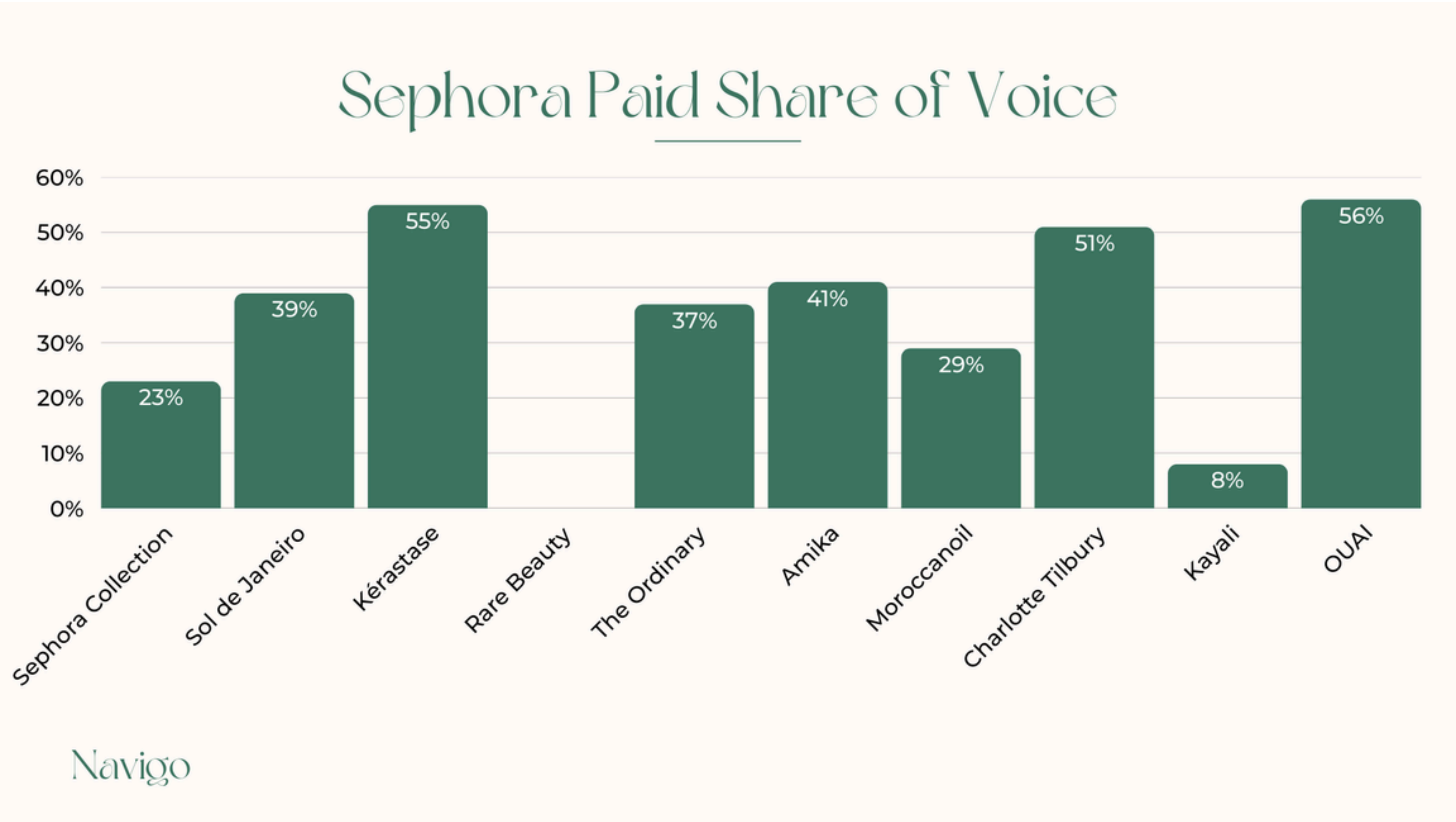
Organic search visibility declined 22.4% compared to last year. Sponsorship activity increased modestly by 8.6%. While strong brands like Rare Beauty, Kérastase, OUAI, and The Ordinary remain in the mix, overall category performance is softer across makeup, skincare, and hair.

A closer look at the top ten brands shows a heavy reliance on paid media to stay visible. OUAI and Kérastase both had over 55% of their keyword visibility coming from paid placements. Charlotte Tilbury and Amika followed closely behind. In contrast, Rare Beauty is an outlier, with 0% paid keywords and continued strong performance. But for most brands, visibility now requires sustained investment.

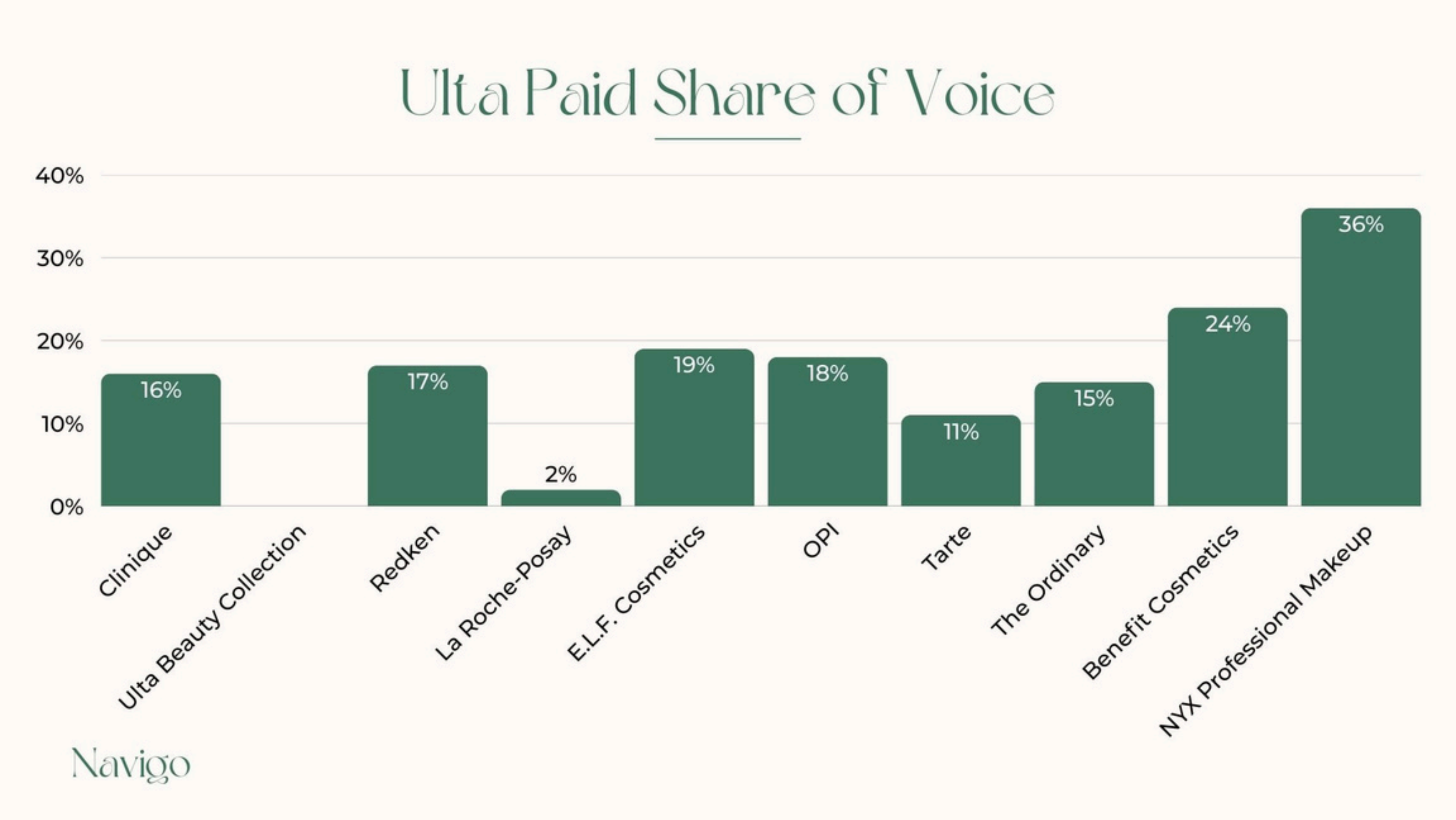
Without meaningful organic support, even sponsored placements face declining return. Sephora continues to be a premium platform, but the cost of staying seen is going up.

Visibility Is the New Shelf Space

We broke down the share of voice for the top ten brands at both retailers, comparing organic and sponsored keyword coverage.



On Sephora, paid is the primary lever. For some brands, more than half of their visibility is dependent on media spend. That gap between media cost and organic value is growing wider.



On Ulta.com, most top brands still have a strong organic foundation. Their paid media strategies are layered on top to drive scale.The takeaway is simple. Paid media is no longer optional. It is the driver of growth. But it is most effective when built on top of a strong foundation. Brands with both are the ones pulling ahead.

The Consumer Has Changed and That Change Is Sticking

Consumers are still spending in beauty, but their behavior has shifted. According to NielsenIQ, 47% of beauty shoppers say promotions impact what they buy. That number was just 38% two years ago.

But it is not only about discounts. Consumers are looking for value through versatility. Mini sizes, travel kits, multi use products, and refillables all performed well. What sold were items that delivered more than one benefit, or made the experience feel elevated without breaking the budget.

Across Ulta and Sephora, the top sellers followed that pattern. IT Cosmetics CC+ Cream, Summer Fridays Lip Butter Balm, Tower 28's SOS Spray, and Dae's 3 in 1 Styling Cream all delivered utility, performance, or self care in one step. Consumers are looking for products that work harder, and they are discovering them through search, not just brand marketing.

Retailer search bars have become one of the most important customer acquisition tools in beauty. If your hero SKU is not visible when a consumer types in hydrating serum or lip gloss stain, you are not in the consideration set.

Ulta’s Marketplace Is Coming and It Will Change the Landscape

This fall, Ulta will launch its third party marketplace, bringing more DTC, masstige, and niche brands into its ecosystem. For shoppers, it means more selection. For brands, it means more competition.

The most important signal from Spring Haul is that visibility is not guaranteed. It is earned. And in many cases, it is bought.

Brands that wait until Q4 to invest in media will face rising costs and lower efficiency. Those that own their most valuable keywords now, before the marketplace opens, will be better positioned to defend share as competition grows.

We expect cost per click to rise across high volume categories. We expect hero SKU competition to intensify. We expect brands that are already investing in full funnel strategies to pull away from the rest.

How We’re Helping Brands Win on Ulta.com

At Navigo Marketing, we are helping brands secure visibility on Ulta before the landscape changes. From paid media execution to keyword optimization and strategic forecasting, our team is already building momentum for brands preparing for the fall launch.

We help our clients identify which SKUs to push, when to invest, and how to structure their campaigns to drive efficient growth. We are already seeing success in this window, and the brands that move now will be the ones leading the next wave of growth.

If you are looking to scale on Ulta, this is your moment.

Let’s talk strategy.