



# Navigo

MARKETING

## Ulta & Sephora Consumer Behavior

### Same Industry. Different Shoppers

Ulta and Sephora may both dominate the beauty retail space, but they cater to fundamentally different consumer mindsets—and now the data proves what many in the industry have long assumed.

By analyzing category-level sales, product trends, and paid media dynamics across both retailers, the numbers backed up the perception. The Ulta shopper and the Sephora shopper aren't just buying different brands—they're solving different problems, shopping in different formats, and responding to different marketing tactics.

#### **Format Is Strategy**

At Sephora, mini sizes continued to play a major role, especially across hair, fragrance, and skincare. Consumers gravitated toward trial-friendly products and compact hero SKUs. Sephora's top-selling products included multiple mini versions, from fragrance travel

sprays to compact cheek duos and serum sets. This signals a shopper who is more exploratory and prestige-oriented, leaning into discovery.

Ulta's shopper, on the other hand, showed strong interest in full-size, single-purpose items—especially when backed by sharp discounts. Products with a clear, functional benefit like hydrating body creams or clarifying cleansers performed best. Multipurpose did have its place, but Ulta's wins came from leading with utility over experimentation.

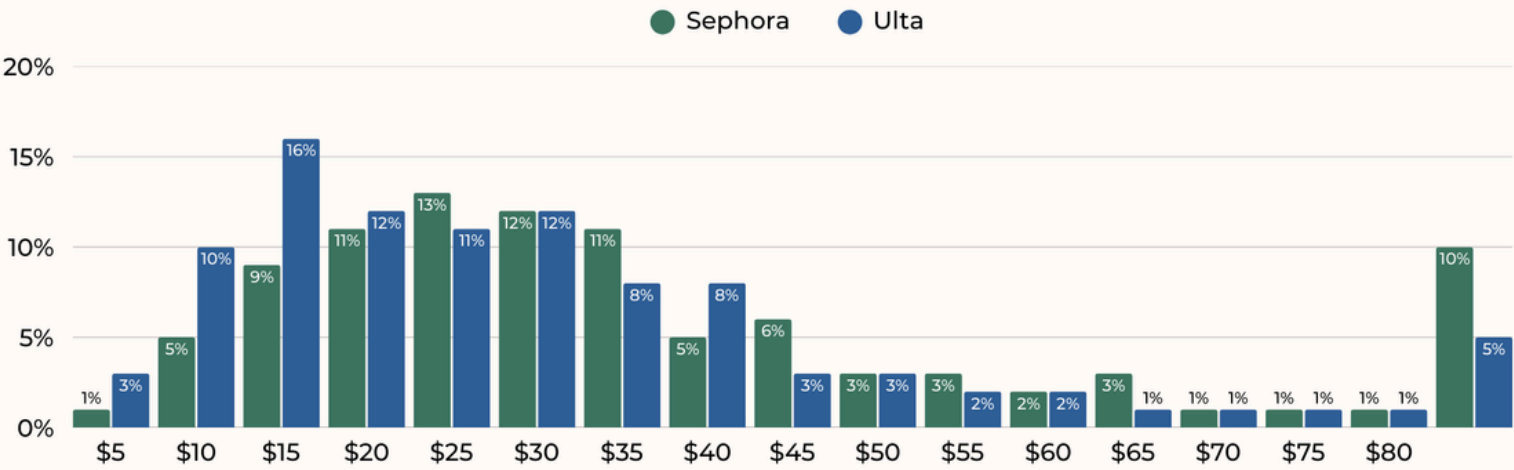
### Categories That Cut Through

The top three categories by growth rate at Ulta in Q1 were:

- **Body Care:** Up double digits YoY, driven by strong promotions on bestselling items like Sol de Janeiro's body creams.
- **Makeup:** Benefited from format simplicity and focus on base products like complexion kits and lip oils.
- **Hair Care:** A consistent performer thanks to brands like Not Your Mother's and OGX, which overperformed during promo periods.

At Sephora, despite declines in overall organic search visibility, skincare and fragrance still dominated share of sales. Brands like The Ordinary, Glow Recipe, and Kayali maintained traction thanks to recognizable hero products, but high price sensitivity and a pullback in category-wide growth led to a more competitive, fragmented landscape.

## Price Distribution Breakdown



## Paid Matters—But Not Equally

Ulta’s most successful brands tied paid efforts to clear moments in the consumer journey. Sponsored placements worked best when attached to proven SKUs, and the brands that invested early reaped outsized returns. At Sephora, the landscape was more saturated. Paid share of voice remained strong, but effectiveness came down to timing and targeting, especially in makeup and fragrance, where competition was high and price points were steeper.

## How the Ulta and Sephora Shoppers Compare

Behavior	Ulta Shopper	Sephora Shopper
Product Format	Prefers full-size, functional items	Leans toward mini/trial size formats
Category Priorities	Body care, haircare, base makeup	Skincare, fragrance, eye + lip
Sensitivity to Price	High – promotion drives conversion	Medium – willing to pay for perceived value
Top Performing Tactic	Promo-backed hero SKUs	Prestige newness and bundling
Paid Media Impact	Strong ROI tied to function and value	Mixed ROI, depends on category + brand equity

## Why It Matters for Brands

What this quarter confirms is that instinct around these platforms has been right all along. Ulta and Sephora are not interchangeable. They serve different roles in the beauty purchase journey. Brands that lean into those roles—through content, product strategy, and media planning—will outperform in 2025.

On Ulta.com, simplicity and scale are winning. Hero SKUs need to be easy to understand, priced right, and consistently supported across promo calendars. At Sephora, prestige storytelling and discovery formats still have power—but it’s more important than ever to own your niche and show up early with paid support before the category saturates.