



# Ulta.com 2024 Category Review

Part 1

# Executive Summary

Ulta.com continues to grow its advertising capabilities with dramatic expansions in the placement and control of advertising on their site. We see over **100% increases in paid activity** in each category from **Q1 to Q4 2024**, brands that are utilizing this channel effectively are stealing market share and **bringing in incremental revenue** for their business.

**Navigo Marketing is the leading partner** in this space and specializes enhancing content, paid media and data analytics to put their partner brands years ahead of their categories.

## Categories covered in part one:

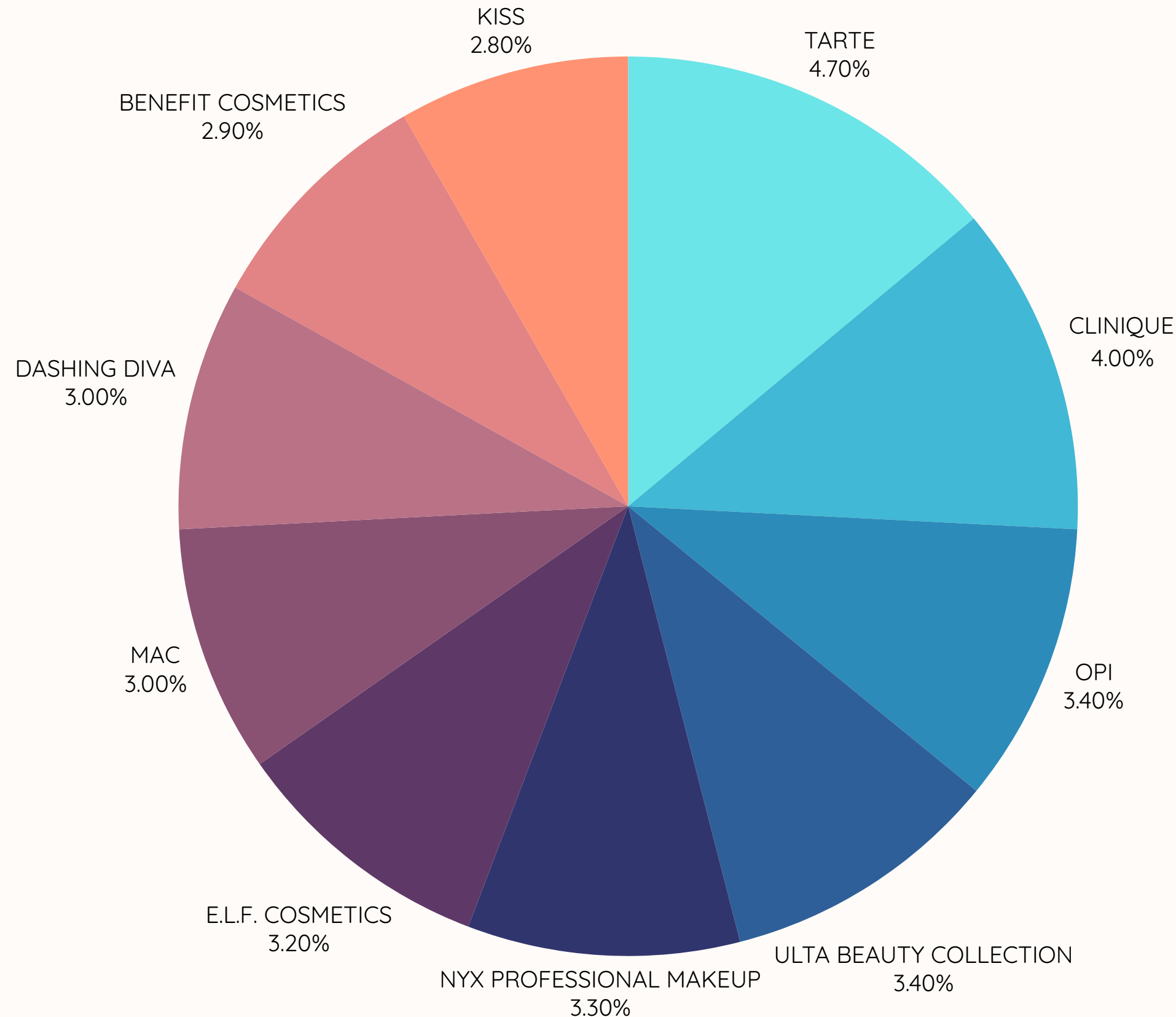
- Makeup
- Body Care
- Fragrance
- Hair

Navigo

# Makeup

# Makeup Category Share of Sales

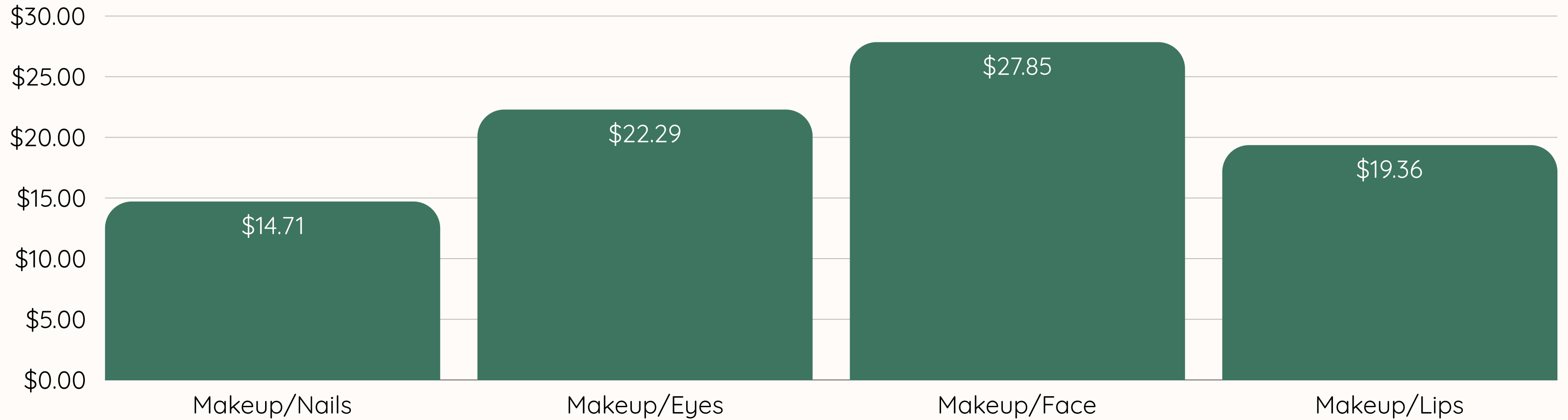
## Top Brands In Makeup



- Top brands in the category accounted for 34% of total sales. These same brands represent 32% of Advertising share.
- Only 3 brands did not advertise:
  - OPI
  - ELF
  - Dashing Diva

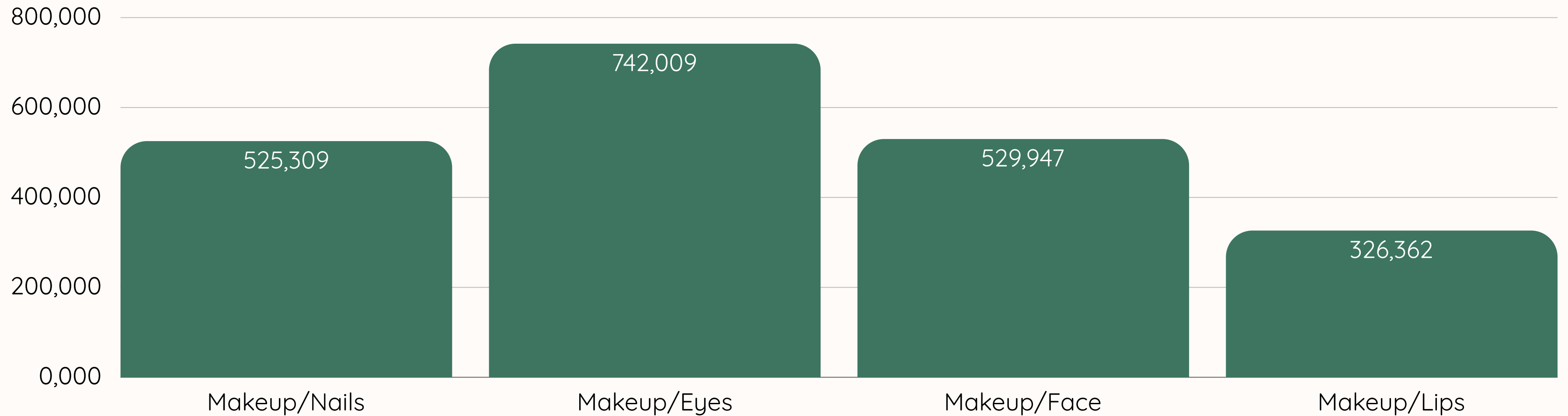
# Makeup Category Average Price

**Average price point in the Makeup category is \$21.05**

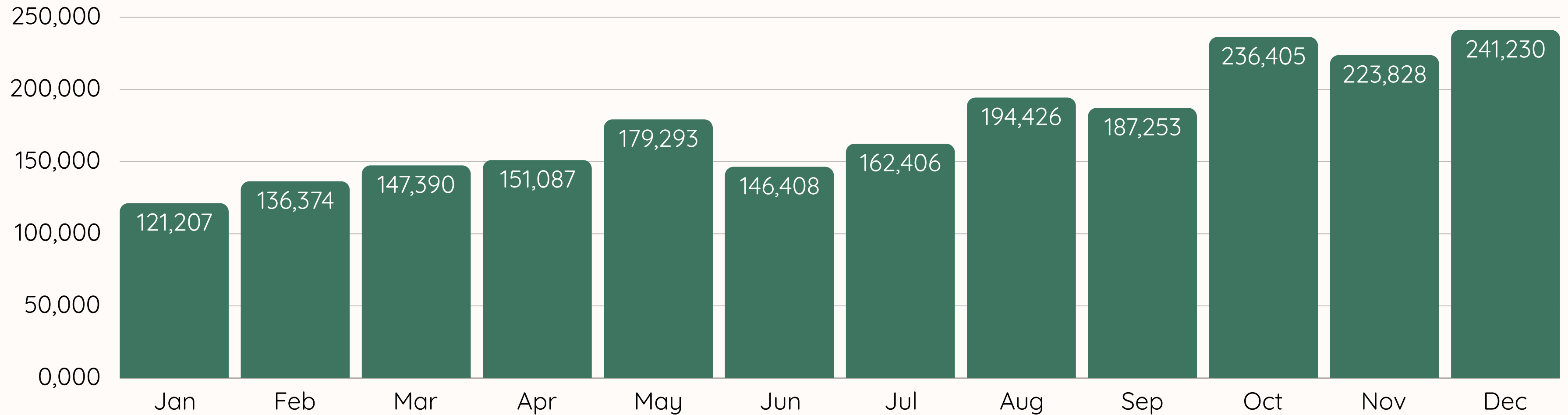


# Makeup Category Advertising Activity

**Overall the Makeup Category is the most sponsored category on Ulta.com**

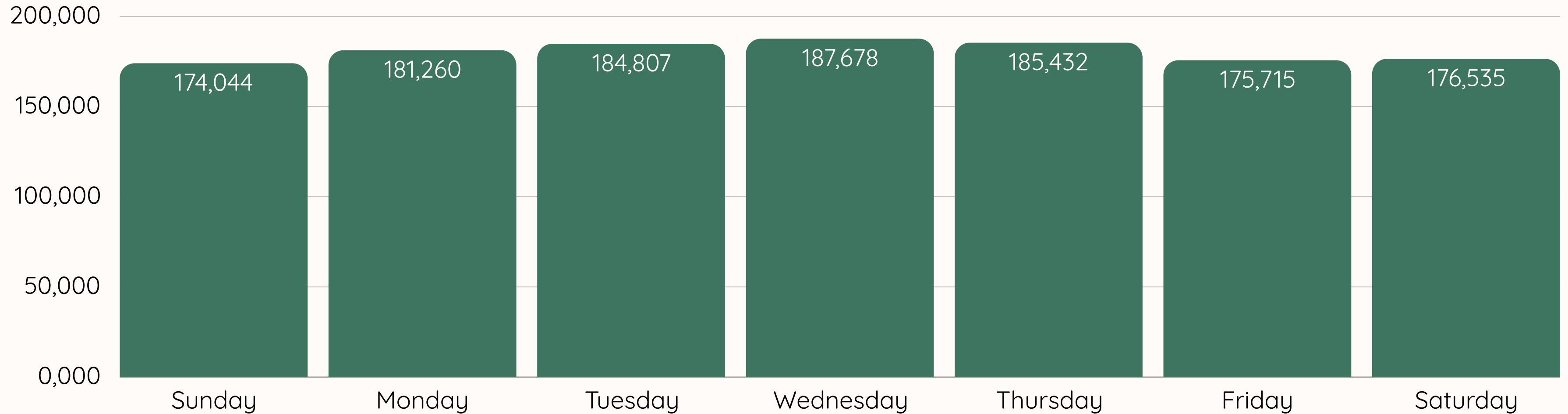


# Advertising Activity Over Time



- Sponsorship activity (Paid Ads) increased dramatically from Q1 to Q4 as more brands leaned into platform advertising.

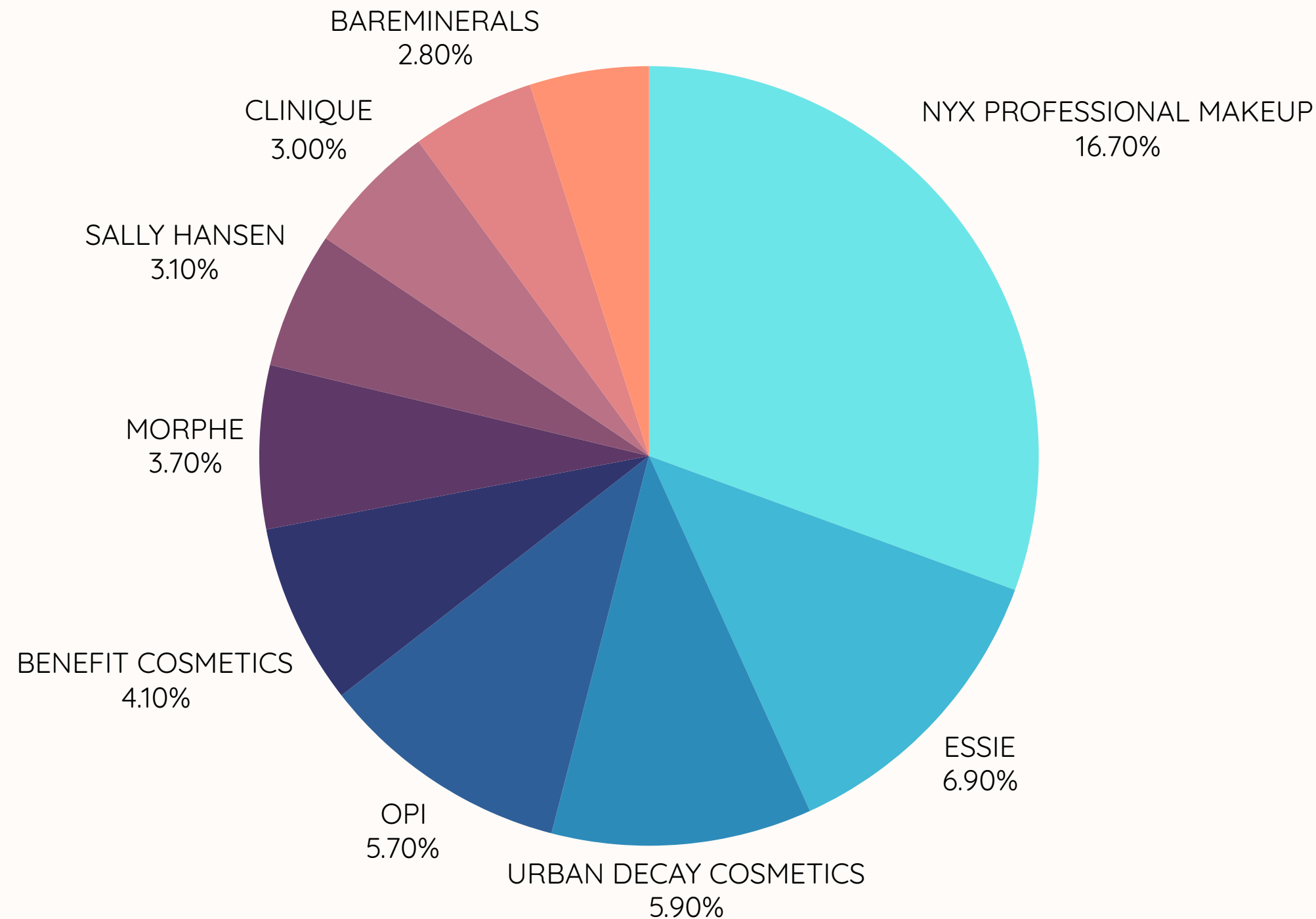
# Advertising Activity by Day of Week



- Sponsorship activity remains relatively steady throughout the week with a peak mid-week and dropping off over the weekend.



# Makeup Advertising Activity



- **The Top Brands represented 34% of all sponsored product activity** - see breakdown to the left.
- NYX holds one of the highest Share of Sponsorships on the site.
- There is strong crossover between Sponsorship activity and Share of sales, much more so than most other categories.

Product	Brand
Retractable Vivid Rich Mechanical Eyeliner Pencil	NYX PROFESSIONAL MAKEUP
Epic Wear Liner Stick Long Lasting Eyeliner Pencil	NYX PROFESSIONAL MAKEUP
Jumbo Eye Pencil All-In-One Eyeshadow Eyeliner Pencil	NYX PROFESSIONAL MAKEUP
24/7 Glide-On Waterproof Eyeliner Pencil	URBAN DECAY COSMETICS
Lift & Snatch Brow Tint Pen Waterproof Eyebrow Pen	NYX PROFESSIONAL MAKEUP
Gel Couture Longwear Nail Polish	ESSIE
4-In-1 Love Your Selfie Longwear Foundation & Concealer	PÃœR
Epic Ink Vegan Waterproof Liquid Eyeliner	NYX PROFESSIONAL MAKEUP
Butter Gloss Non-Sticky Lip Gloss	NYX PROFESSIONAL MAKEUP

The Top 9 sponsored products represented 20% of total sponsorship share.

- **NYX Professional**
  - NYX holds an astounding 6/9 top sponsored products in the category.
  - Their share of sales has increased throughout the year proving this aggressive strategy is working for them.

Product	Brand
CC+ Cream with SPF 50+	IT COSMETICS
Shape Tape Full Coverage Concealer	TARTE
Liquid Lip Blush & Cheek Tint	BENEFIT COSMETICS
Gel Couture Top Coat	ESSIE
Full-On Plumping Lip Polish	BUXOM
Glow Reviver Lip Oil	E.L.F. COSMETICS
Gel Couture Longwear Nail Polish	ESSIE
CC+ Nude Glow Lightweight Foundation + Glow Serum with SPF 40	IT COSMETICS
Vite Dry Fast Top Coat	SECHE

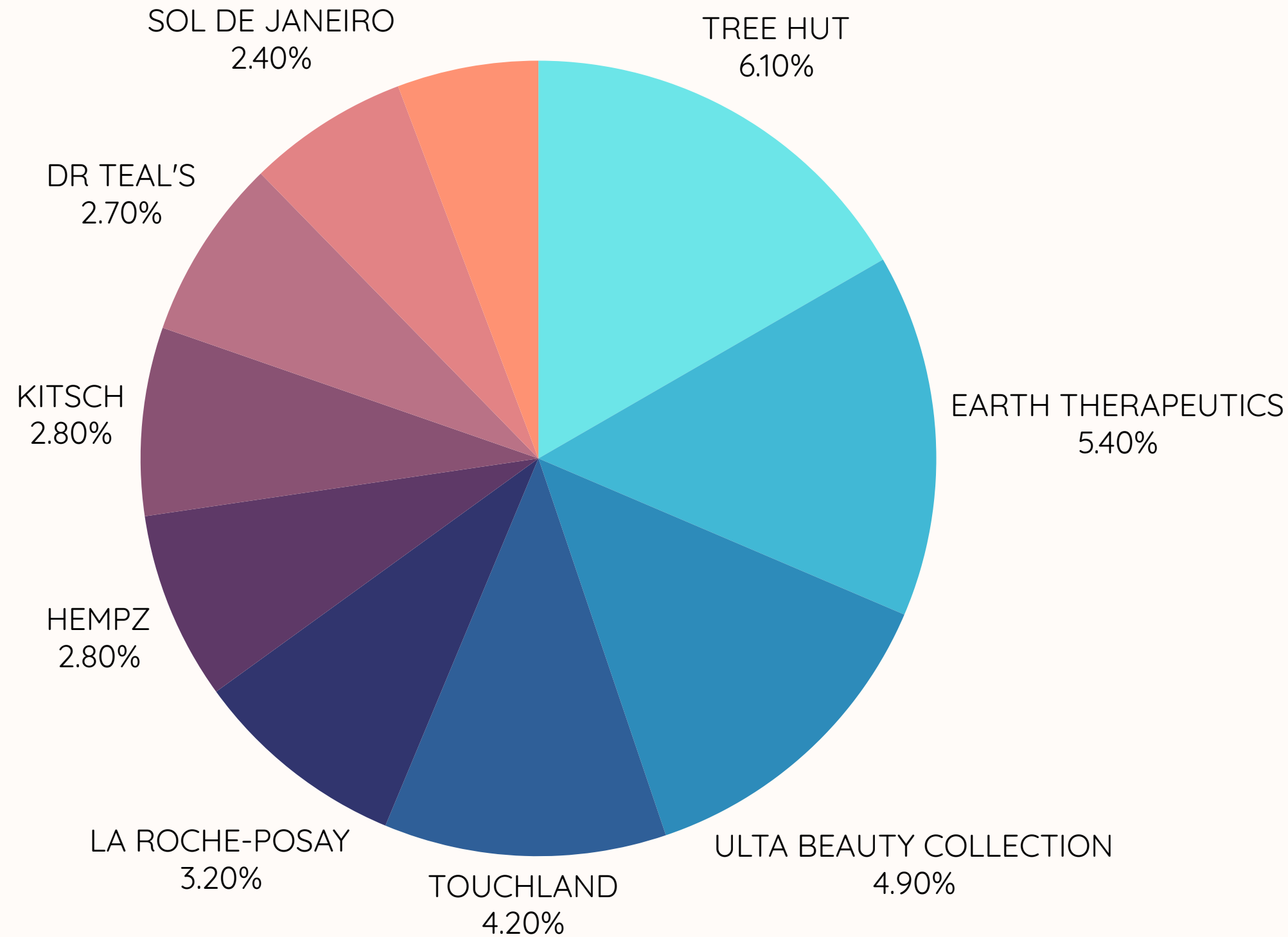
The Top 9 products represented 2% of total Sales share.

- **ELF’s missed opportunity**
  - Elf is one of the fastest growing brands in the beauty space but is not leveraging Ulta.com to its fullest potential. They’re leaving valuable real estate open to competitor brands and only have 1 product amongst the top.
- **NYX**
  - While NYX has many top sponsored products they have not seen one break through to the top in share of sales. Ulta advertising rewards new traffic and a switch to focusing on only a handful of advertised products may help give them the boost they are looking for.

# Body Care

# Body Care Category Share of Sales

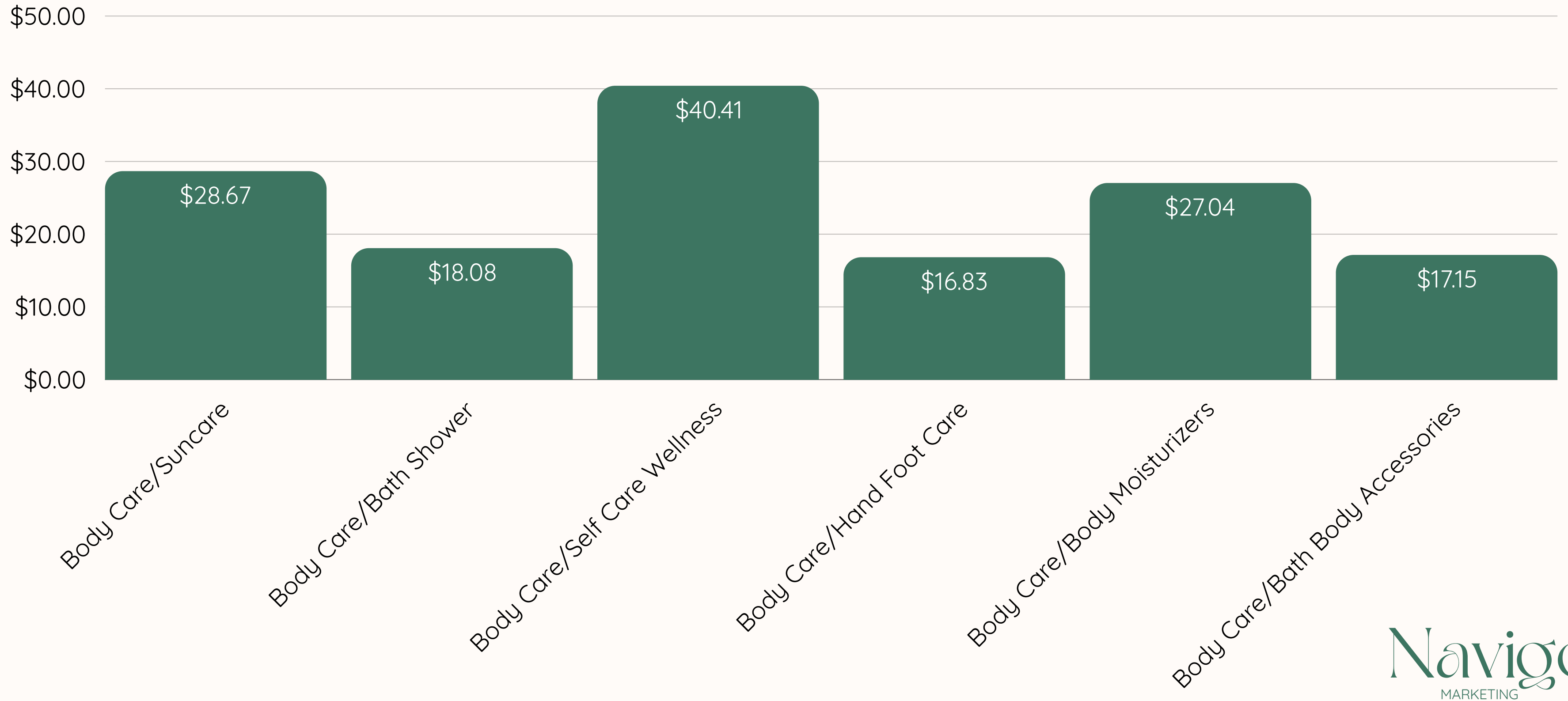
## Top Brands In Body Care



- Top brands in the category accounted for 36.6% of total sales. These same brands represent 33% of Advertising share.
- However only 5 of these brands advertised throughout the year.

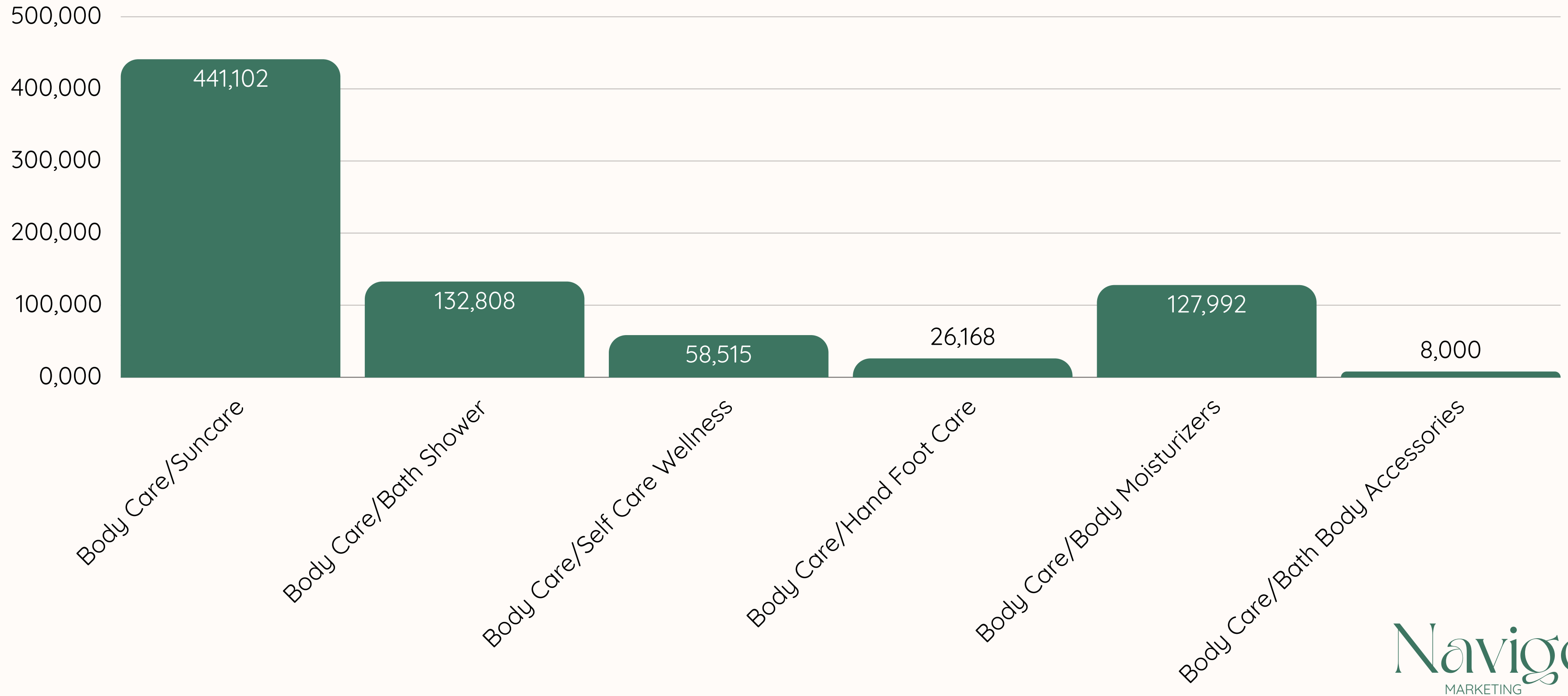
# Body Care Category Average Price

**Average price point in the Body Care category is \$24.70**

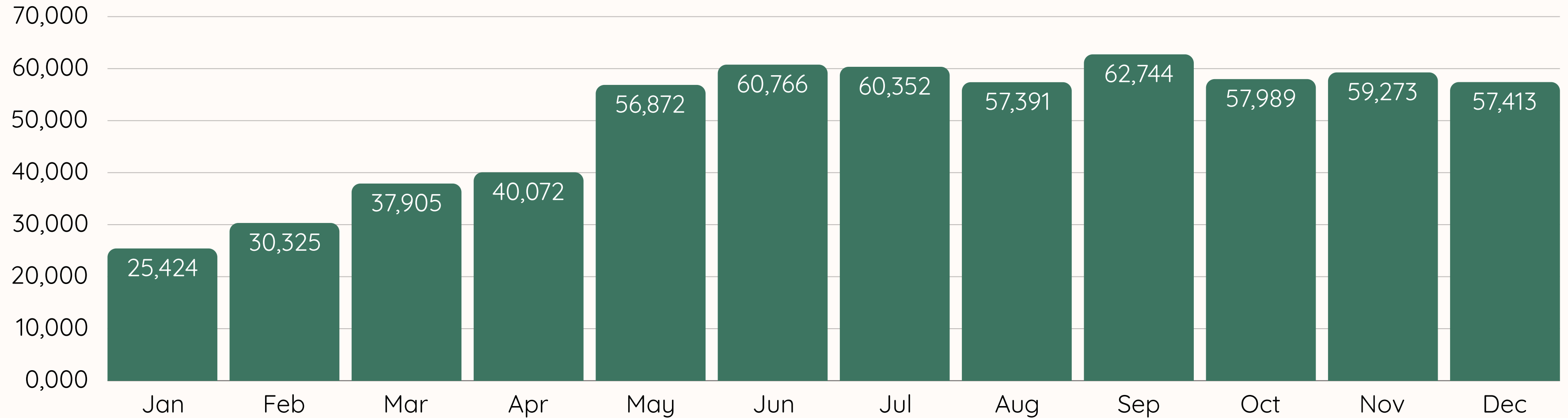


# Body Care Category Advertising Activity

**Sun care is by far the most competitive sub-category in Body Care**



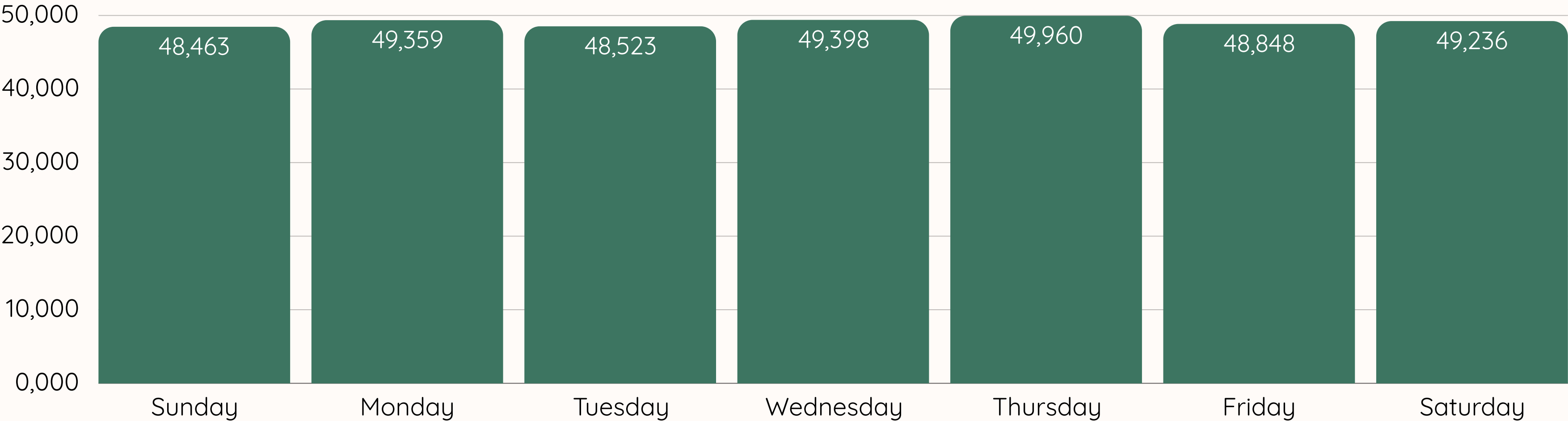
# Advertising Activity Over Time



- Sponsorship activity (Paid Ads) increased dramatically from Q1 to Q4 as more brands leaned into platform advertising.

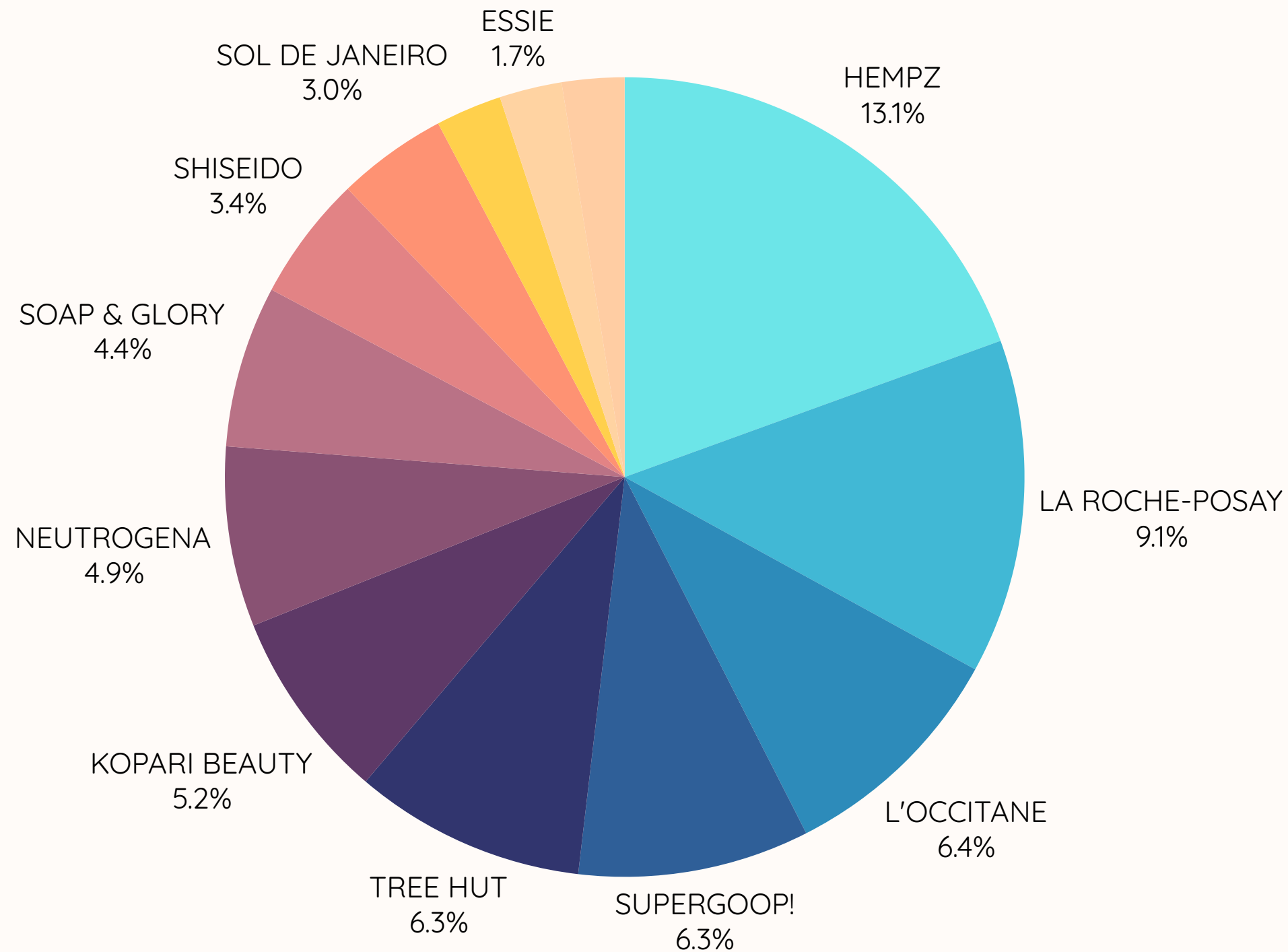


# Advertising Activity by Day of Week



- Sponsorship activity remains relatively steady throughout the week with minimal shifts by day.

# Body Care Advertising Activity



- **The Top Brands represented 62% of all sponsored product activity** - see breakdown to the left.
- Tree Hut had the most sponsored products (71) but was #5 in total activity share.
- La Roche-Posay was #2 in share, but with only 13 sponsored products.

Product	Brand
Anthelios Mineral Tinted Ultra Light Face Sunscreen Fluid SPF 50	LA ROCHE-POSAY
Unseen Sunscreen SPF 40	SUPERGOOP!
Urban Environment Oil-Free Sunscreen Broad-Spectrum SPF 42	SHISEIDO
Limited Edition Tropical Coconut Herbal Body Wash	HEMPZ
Anthelios UV Hydra Sunscreen SPF 50 with Hyaluronic Acid	LA ROCHE-POSAY
PLAY Everyday Lotion SPF 50 with Sunflower Extract PA++++	SUPERGOOP!
Sunglaze Sheer Body Mist Sunscreen SPF 42	KOPARI BEAUTY
Ultra Sheer Face Serum SPF 60+	NEUTROGENA
Golden Amber Sun Shield Body Glow Sunscreen SPF 30	KOPARI BEAUTY

The Top 9 sponsored products represented 21% of total sponsorship share.

- **More isn't always better**
  - Hempz sponsoring so many products dilutes its ability to gain traction with any single product. They hold a commanding lead in share of sponsorship but fall to #4 when we look at individual products.
- **Focusing Spend**
  - Kopari is able to drive awareness and compete with Supergoop and other juggernauts in the space because they've focused their spend on only top products.

Product	Brand
Ultimate Strength Hand Salve	KIEHL'S SINCE 1851
Undaria Algae Body Oil	OSEA
Luxe Double Sided Applicator Self-Tan Mitt	ST. TROPEZ
Power Mist Wild Watermelon Hydrating Hand Sanitizer	TOUCHLAND
Original Exfoliation Lavender Scented Foot Peel	BABY FOOT
Deluxe Self Tanning Applicator Mitt	LOVING TAN
Repairing Foot Masks	AQUAPHOR
Tropic Glow Firming Whipped Body Butter	TREE HUT
Satin-Lined Shower Cap	KITSCH

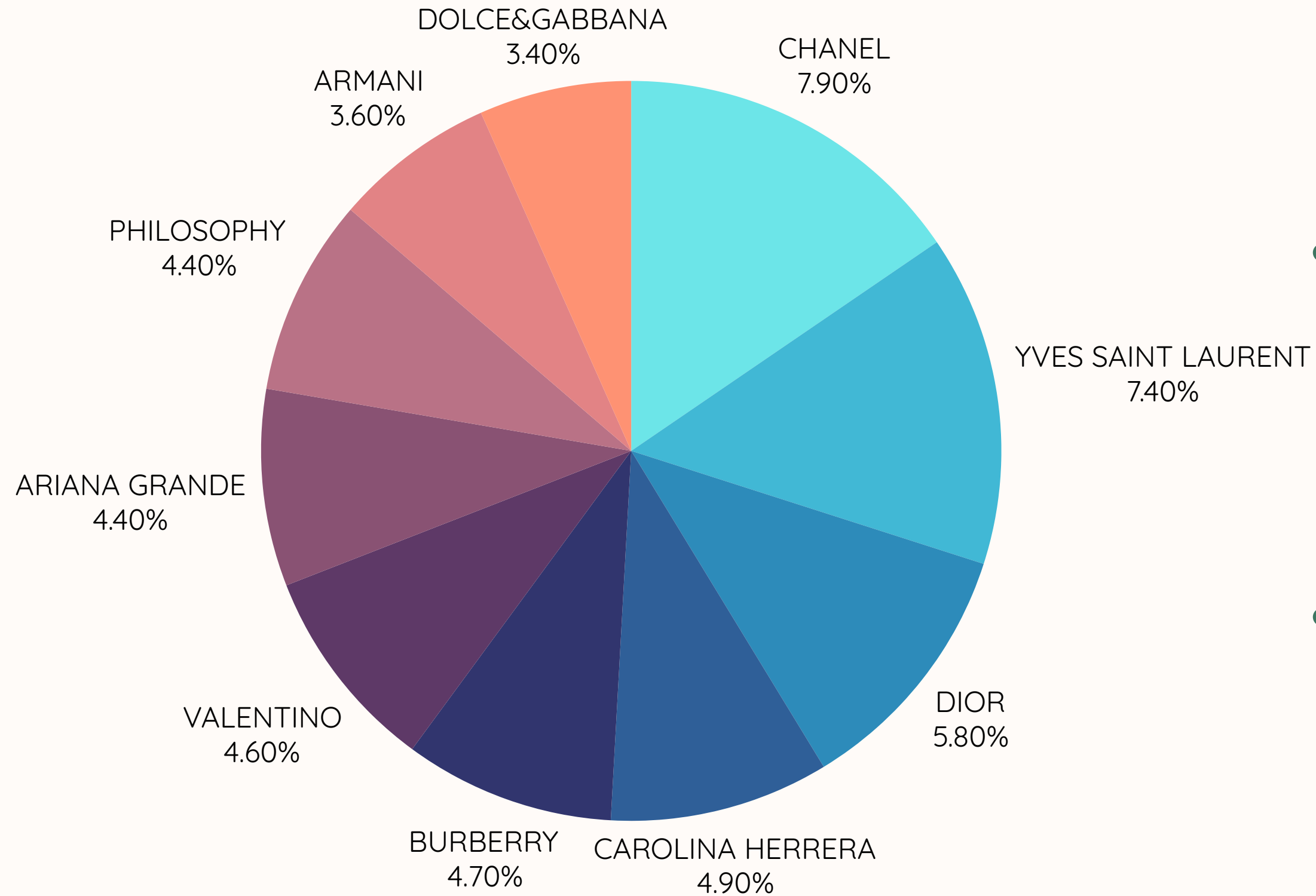
The Top 9 products represented 4% of total Sales share.

- A diverse set of products sits on top
  - Top selling products vary dramatically by price point, sponsorship activity and sub-category.
  - We expect this to change as more brands start focusing on Ulta.com to drive incremental revenue in 2025 and competition grows.

# Fragrance

# Fragrance Category Share of Sales

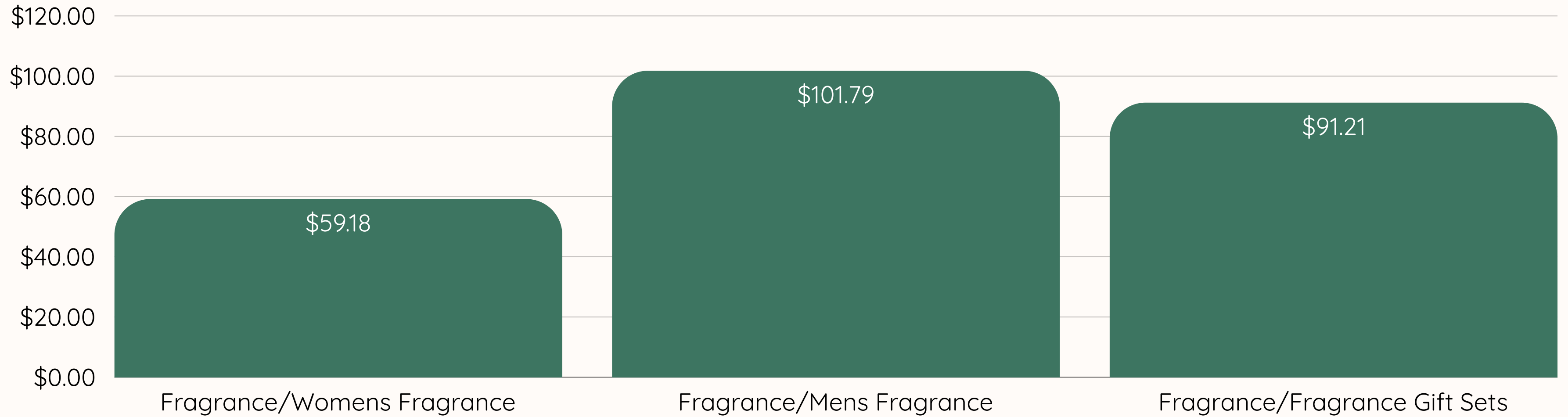
## Top Brands In Fragrance



- Top brands in the category accounted for 51% of total sales. These same brands represent 29% of Advertising share.
- Only 3 brands did not advertise:
  - Armani
  - Ariana Grande
  - Philosophy

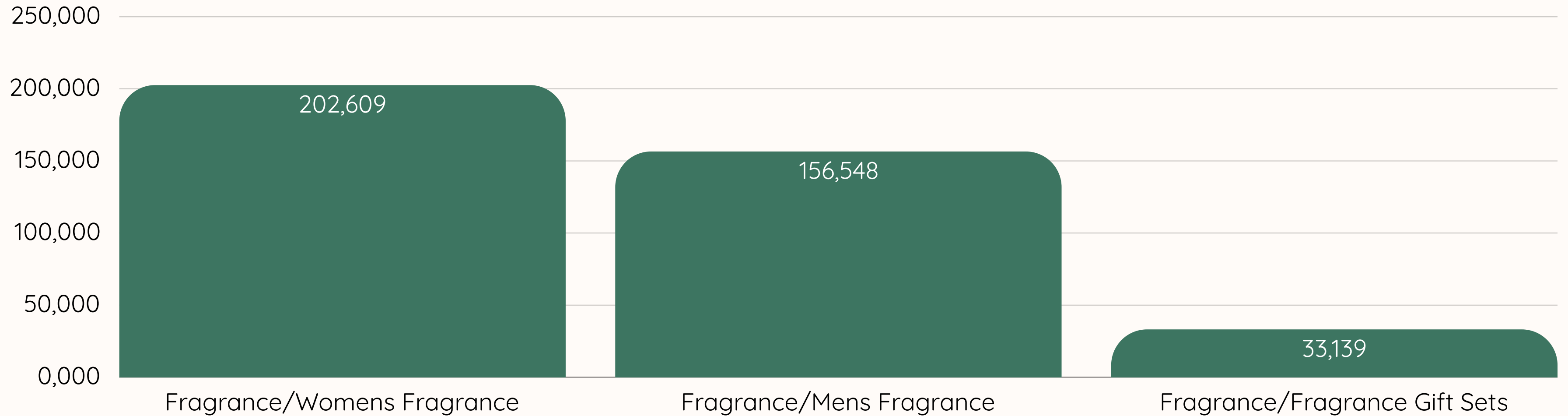
# Fragrance Category Average Price

**Average price point in the Fragrance category is \$84.06**



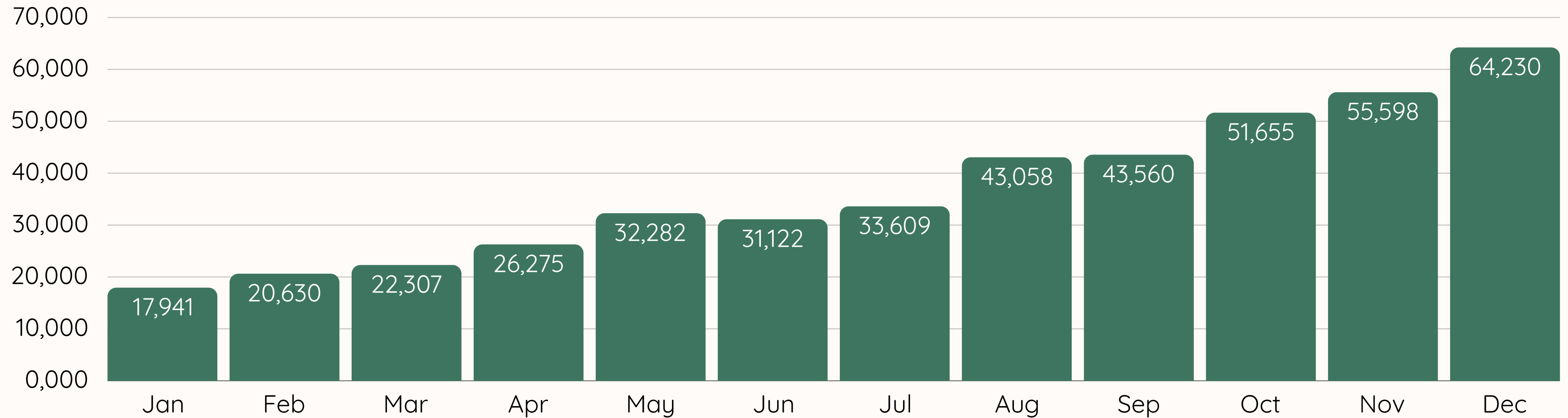
# Fragrance Category Advertising Activity

**Women's fragrance see's the highest search volume in the category**



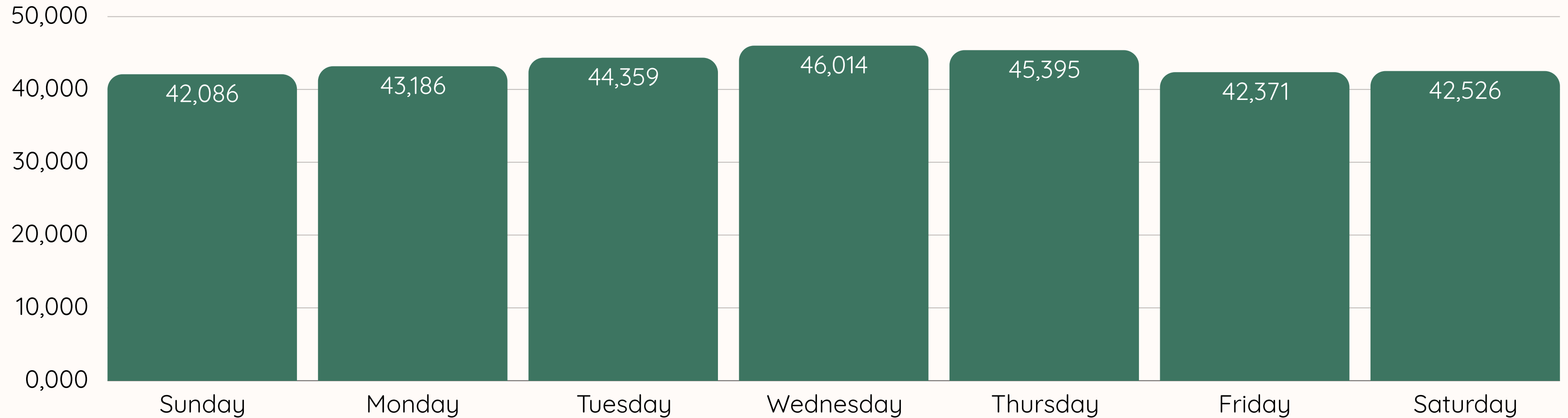


# Advertising Activity Over Time



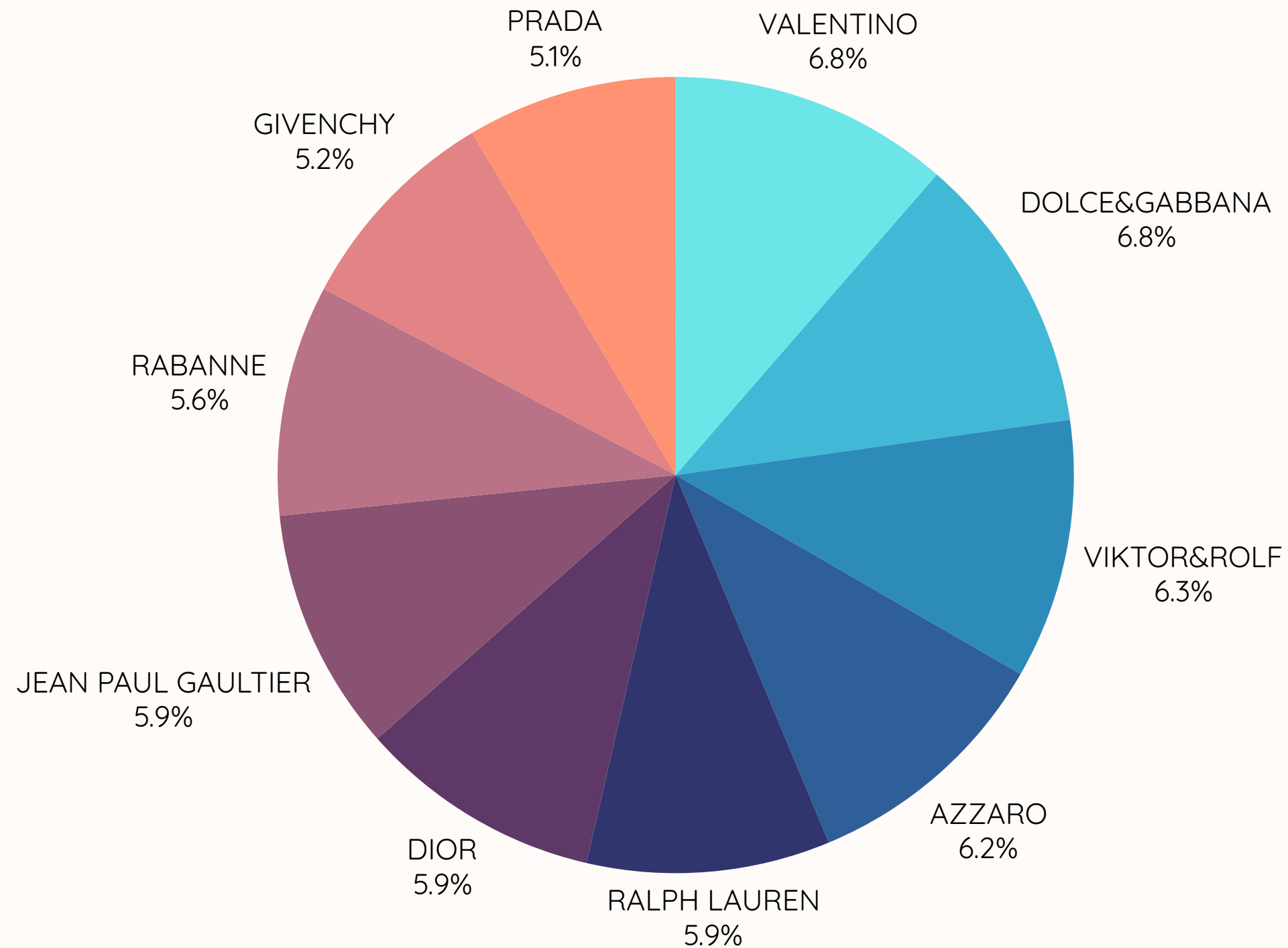
- Sponsorship activity (Paid Ads) increased dramatically from Q1 to Q4 as more brands leaned into platform advertising.

# Advertising Activity by Day of Week



- Sponsorship activity remains relatively steady throughout the week with a peak mid-week and dropping off over the weekend.

# Fragrance Advertising Activity



- **The Top Brands represented 60% of all sponsored product activity** - see breakdown to the left.
- Dior had the most sponsored products (29) followed by Dolce & Gabbana (27), but was #7 in total activity share.
- Azzaro was #4 in share, but with only 10 sponsored products.

Product	Brand
Irresistible Eau de Parfum	GIVENCHY
Dolce & Gabbana Light Blue for Women Eau de Toilette Spray - 1.6 oz - Dolce & Gabbana Light Blue Perfume and Fragrance	DOLCE&GABBANA
Le Male Elixir Parfum	JEAN PAUL GAULTIER
The Most Wanted Parfum	AZZARO
Uomo Born in Roma Intense Eau de Parfum	VALENTINO
Le Male Le Parfum	JEAN PAUL GAULTIER
The Most Wanted Eau de Parfum Intense	AZZARO
Sauvage Eau de Parfum	DIOR
1 Million Eau de Toilette	RABANNE

The Top 9 sponsored products represented 24% of total sponsorship share.

- **Early Adopters**

- The total number of brands in the Fragrance category is much lower than most other categories. This has lead to early adoption in advertising and expanding focus on Ulta.com.
- Brands are evenly balanced across the top products with little variation in share of sponsorship across the top products.

The Top 9 products represented 7% of total Sales share.

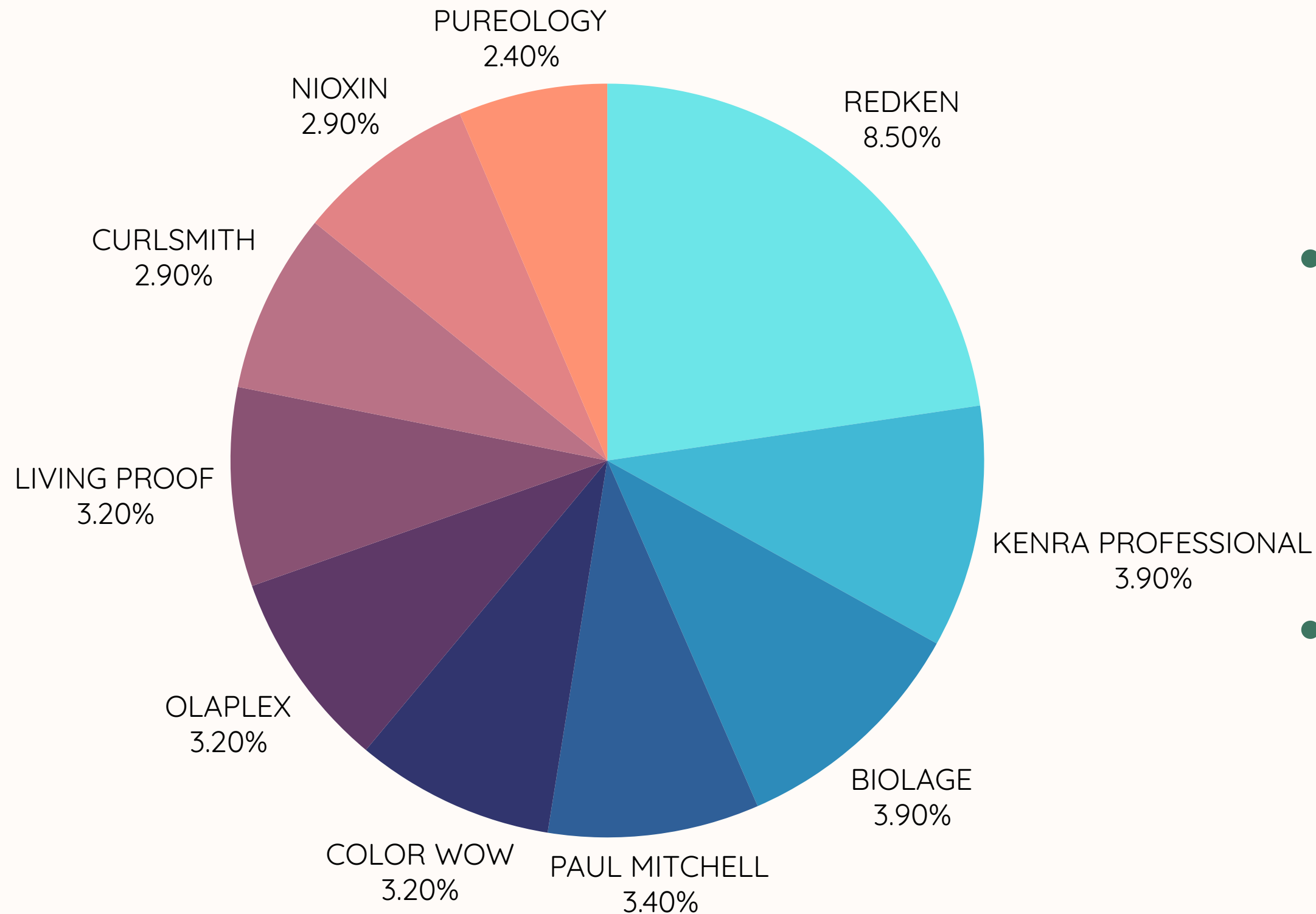
- **A diverse set of products sits on top**
  - Top selling products in the fragrance category see a higher concentration of sets and kits.
  - Women’s fragrance has significantly higher (+100%) search activity than Men’s fragrance.

Product	Brand
Feminine Fragrance Must-Haves	YVES SAINT LAURENT
Giorgio Armani Fragrance Must-Haves 2 Piece Mini Gift Set	ARMANI
Cheirosa 62 Bum Bum Hair & Body Perfume Mist	SOL DE JANEIRO
Cashmere Mist Deodorant	DONNA KARAN
Donna Born In Roma Eau de Parfum	VALENTINO
Cheirosa 40 Hair & Body Perfume Mist	SOL DE JANEIRO
Eilish Eau de Parfum	BILLIE EILISH
Her 4-Piece Discovery Mini Gift Set	BURBERRY
Mini Good Girl & Good Girl Blush Perfume Set	CAROLINA HERRERA

Hair

# Hair Category Share of Sales

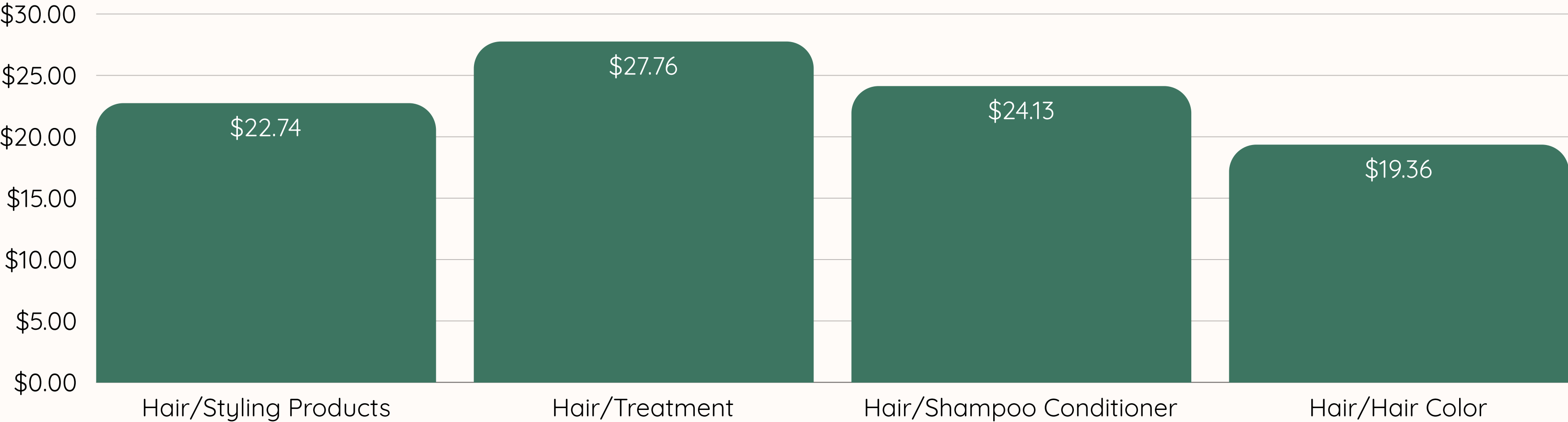
## Top Brands In Hair



- Top brands in the category accounted for 51% of total sales. These same brands represent 28% of Advertising share.
- Only 2 brands did not advertise:
  - Paul Mitchell
  - Colow Wow

# Hair Category Average Price

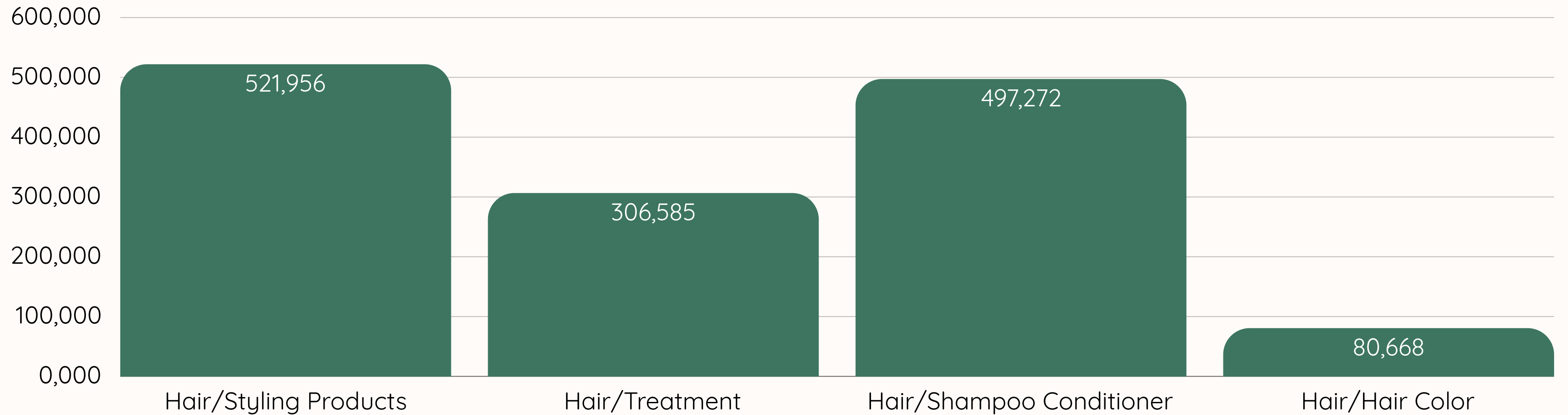
Average price point in the Hair category is \$23.50



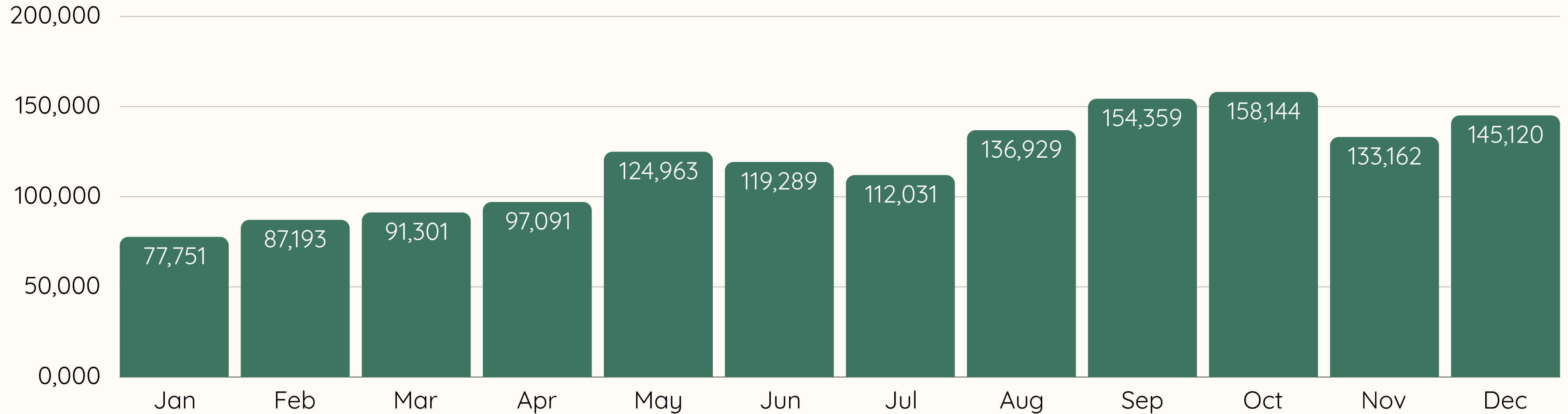


# Hair Category Advertising Activity

**Styling Products and Shampoo/Conditioner see the most paid activity**

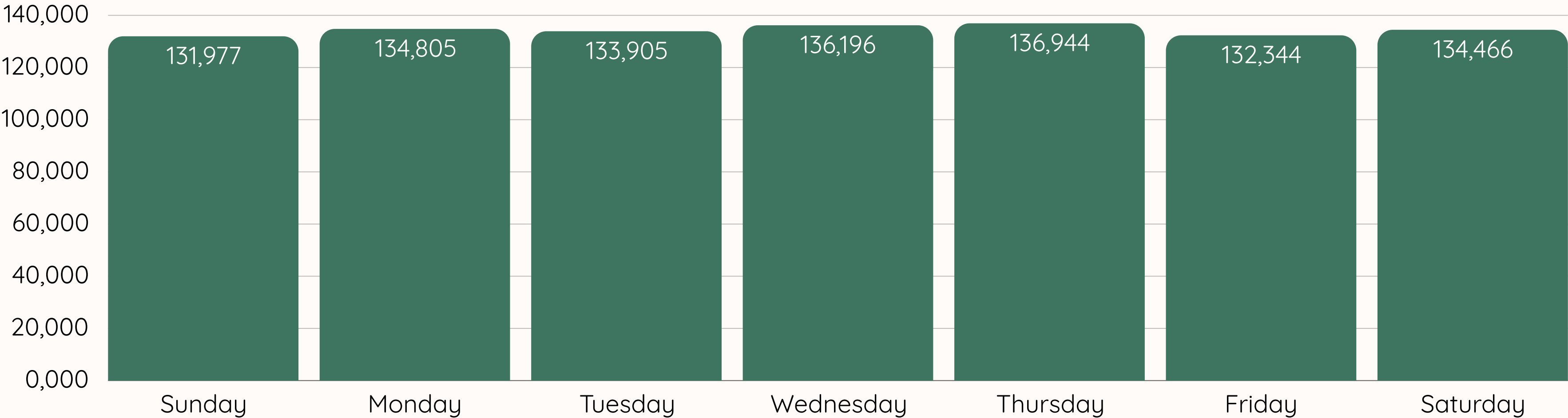


# Advertising Activity Over Time



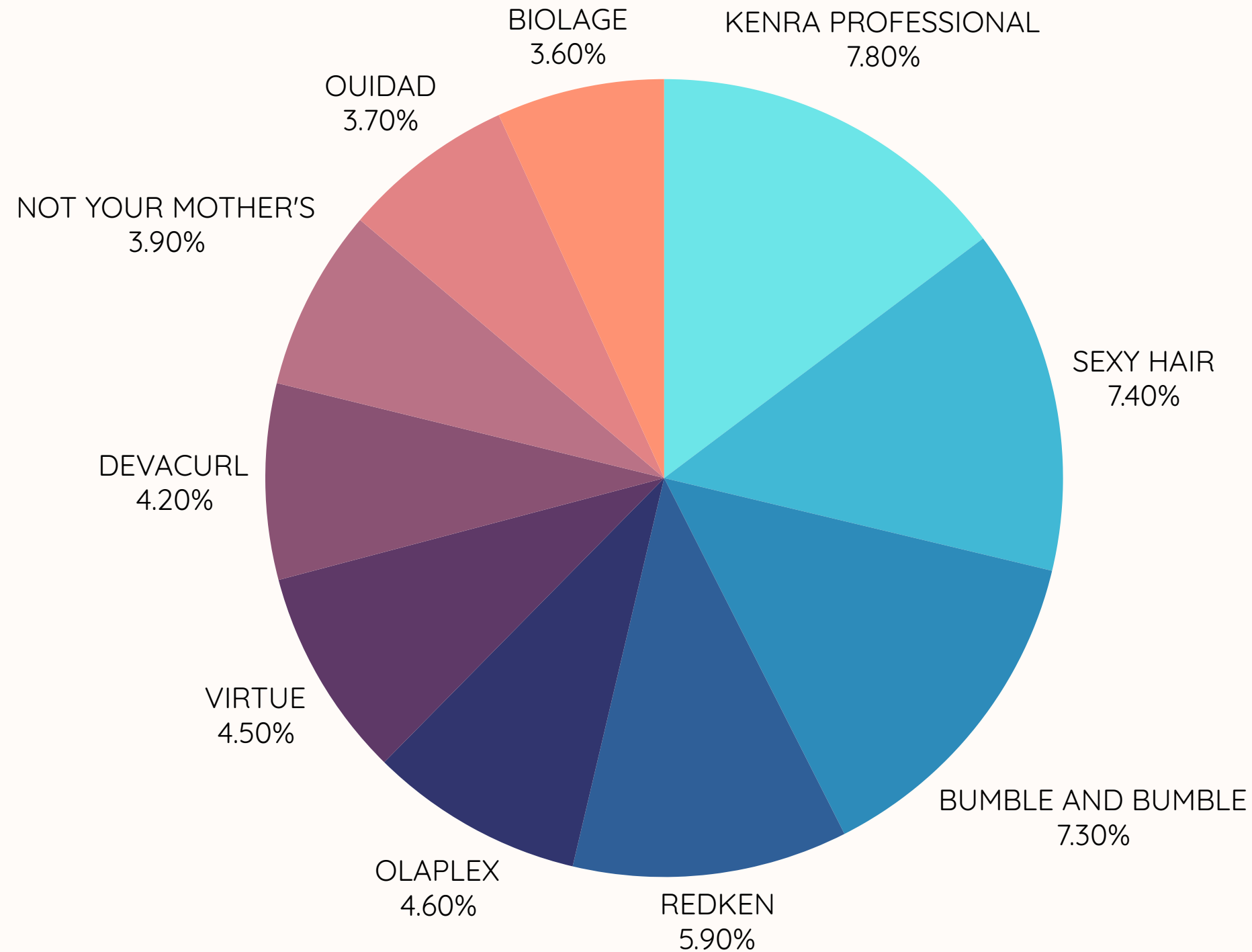
- Sponsorship activity (Paid Ads) increased dramatically from Q1 to Q4 as more brands leaned into platform advertising.

# Advertising Activity by Day of Week



- Sponsorship activity remains relatively steady throughout the week with a peak mid-week and dropping off over the weekend.

# Hair Advertising Activity



- **The Top Brands represented 53% of all sponsored product activity** - see breakdown to the left.
- Kenra had the most sponsored products (41) and was #7 in total activity share.
- Olaplex was #5 in share with the least sponsored products (15)

Product	Brand
Radiant Hair Color Kit	MADISON REED
Design Spray 9	KENRA PROFESSIONAL
Big Sexy Hair Root Pump Plus Humidity Resistant Volumizing Spray Mousse	SEXY HAIR
Perfect Medium Spray 13	KENRA PROFESSIONAL
Travel Size Big Sexy Hair Spray & Play Volumizing Hairspray	SEXY HAIR
Thermal Styling Spray 19	KENRA PROFESSIONAL
Anti-Humidity Spray 5	KENRA PROFESSIONAL
No. 4 Bond Maintenance Strengthening and Reparative Hair Shampoo	OLAPLEX
Shampoo, Fragrance Free	SEEN

The Top 9 sponsored products represented 18% of total sponsorship share.

- **Kenra Professional**
  - Kenra is quickly growing in the hair category with 4/9 top products and the highest overall sponsorship. Their aggressive strategy has positioned them as the #2 best selling hair brand on Ulta.com.
- **Olaplex**
  - Olaplex has started to incorporate advertising into their overall Ulta strategy and have been able to stop the decrease in their overall share of sales.

Product	Brand
No.7 Bonding Hair Oil	OLAPLEX
Gloss+	DPHUE
Rosemary Mint Scalp & Hair Strengthening Oil	MIELLE
Radiant Hair Color Kit	MADISON REED
Perfecting Leave-In	LOLAVIE
No. 6 Bond Smoother Frizz Control Styling Hair Cream	OLAPLEX
Glossing Detangler	LOLAVIE
Strength Recovery Repairing Leave-In Conditioner Spray with Heat Protection	BIOLAGE
Multi-Peptide Serum for Hair Density	THE ORDINARY

The Top 9 products represented 4% of total Sales share.

- **Olaplex still on top**
  - Despite headwinds the brand has faced over the last few years they still hold 2 of the top 9 best selling products in their category.
- Biolage and Olaplex are the only major brands who are investing in paid media on Ulta and are represented in the top 9 products.

**Reach out for a case study on how we  
helped a top body care brand increase sales  
700% in less than 100 days.**

**Want a closer look at your brand's performance?  
Reach out for a personalized audit!**