

Sephora.com Performance Review

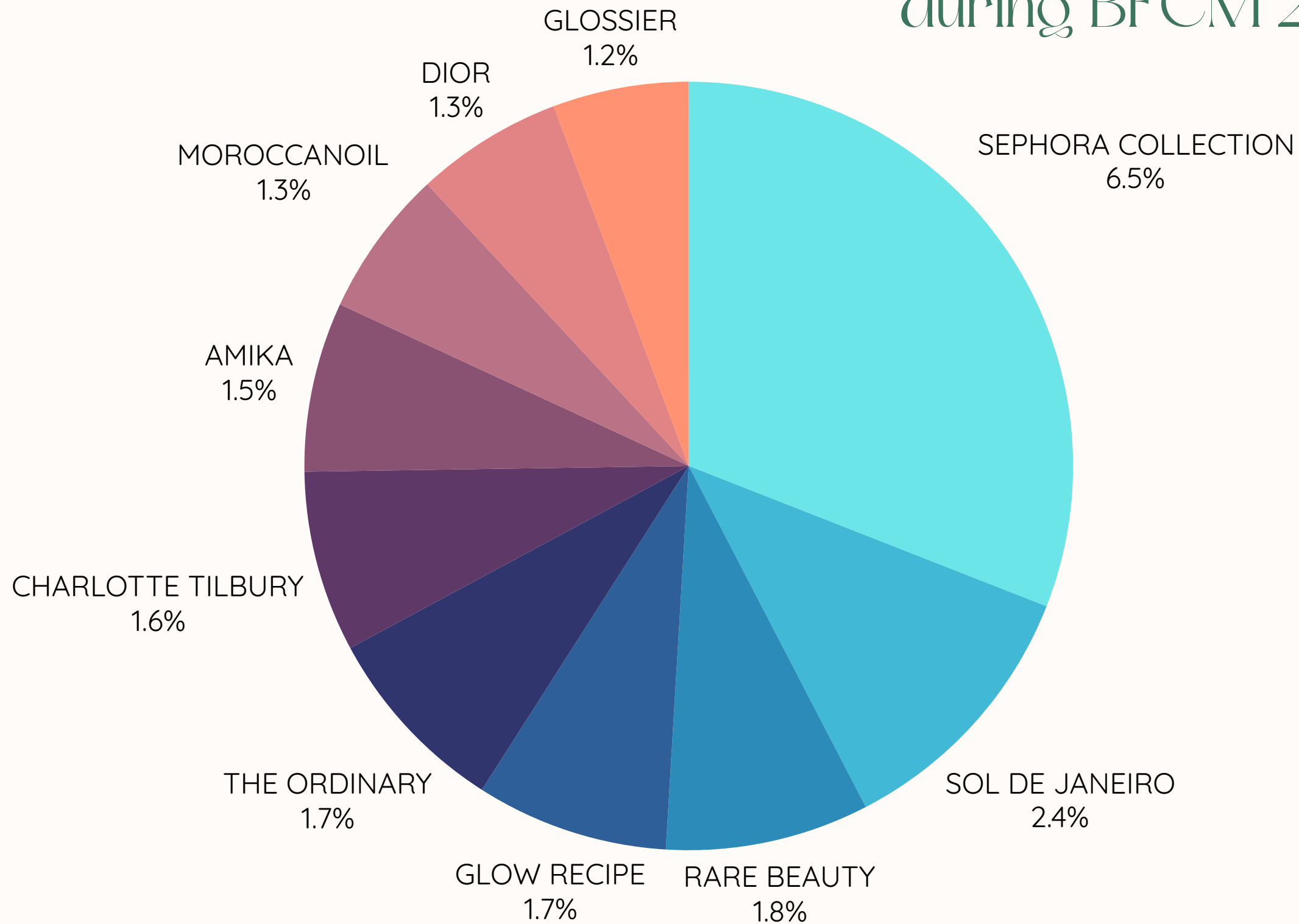
Black Friday & Cyber Monday 2024 vs 2023

Key Takeaways

- While Legacy brands continue to dominate the platform, we see rising challengers who are starting to compete. **Brands like Touchland and Summer Fridays** outperformed in their categories and captured new customers.
- Sponsorship activity continues to rise year-over-year as Sephora looks for new revenue streams and opportunities drive higher customer lifetime value. **Similar to in-store paid placements**, the most visible spots for online customers now come at an extra cost.
- Brands who shifted strategy to focus on driving **awareness for deals off-platform paired with onsite sponsorship** were the winners this year.

Sales Performance Summary

Sol De Janeiro, Rare Beauty and The Ordinary had the highest sales during BFCM 2024.



- **The Top 10 brands represented 22% of total sales** - see breakdown on the left.
- While cosmetic brands dominated Ulta.com during the event, we see a shift on Sephora towards skincare pushing cosmetics to a secondary position.

Skincare Sets were top sellers.

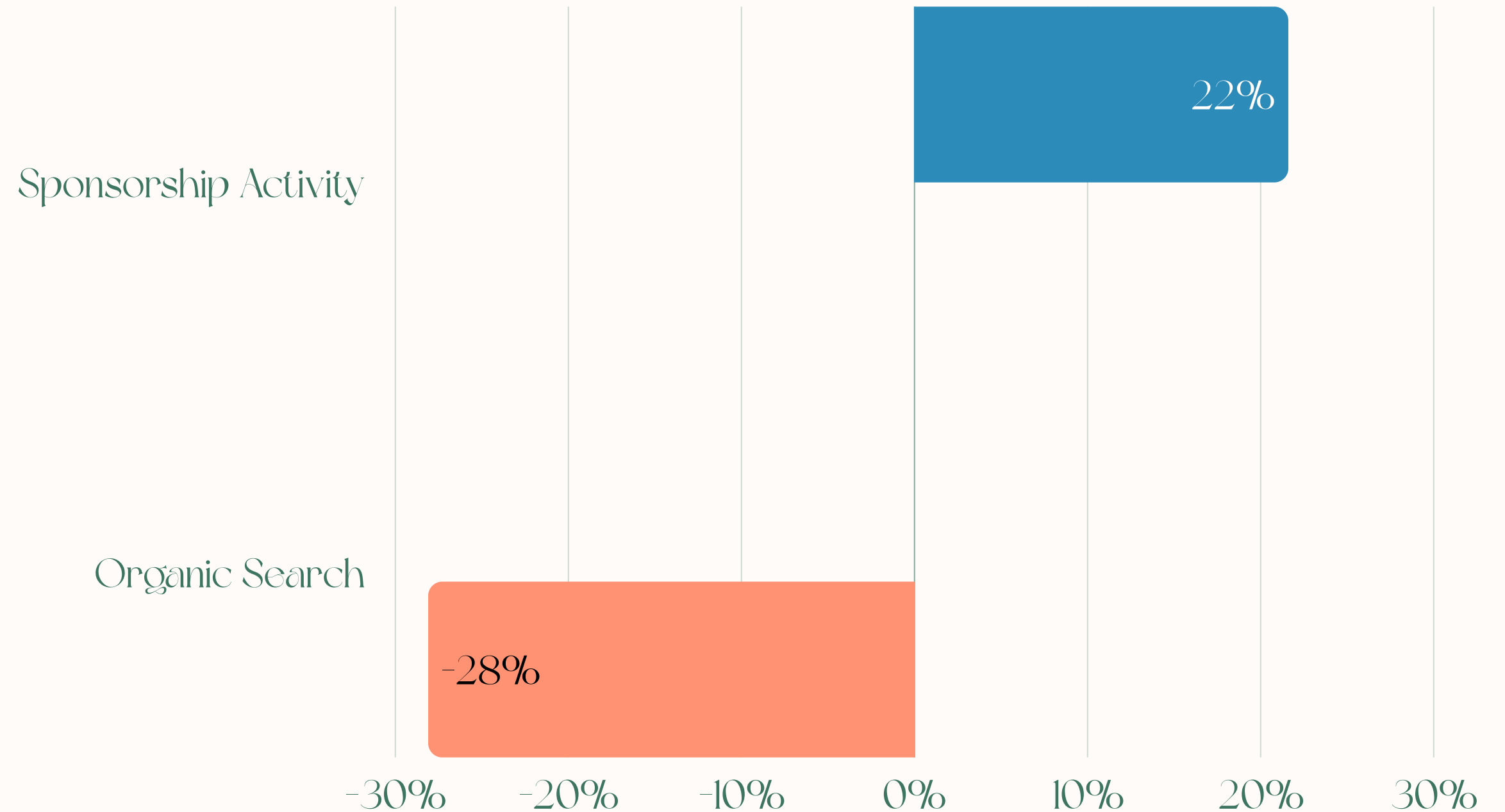
#	Product	Brand	Category
1	Lip Butter Balm for Hydration & Shine	SUMMER FRIDAYS	Skincare
2	Power Mist Hydrating Hand Sanitizer	TOUCLAND	Bodycare
3	Balm Dotcom Lip Balm and Skin Salve	GLOSSIER	Skincare
4	Beija Flor™ Jet Set	SOL DE JANEIRO	Bodycare
5	Brazilian Bum Bum Jet Set	SOL DE JANEIRO	Skincare
6	SOS Daily Rescue Facial Spray with Hypochlorous Acid	TOWER 28 BEAUTY	Skincare
7	Bom Dia Bright™ Jet Set	SOL DE JANEIRO	Skincare
8	Mini Pillow Talk Lipstick & Liner Set	CHARLOTTE TILBURY	Skincare
9	Honey Infused Hydrating Lip Oil	GISOU	Skincare
10	Mini SOS Daily Rescue Facial Spray with Hypochlorous Acid	TOWER 28 BEAUTY	Skincare

- Of the Top 10 sold products, 5 were sets/kits.
- Sol De Janeiro continued to dominate with 30% of the top 10 products.
- Touchland continued their meteoric rise with their hero product jumping to the top of Sephora best sellers.
- Summer Fridays made a surprise appearance as the top selling product during the event with their Lip Butter.

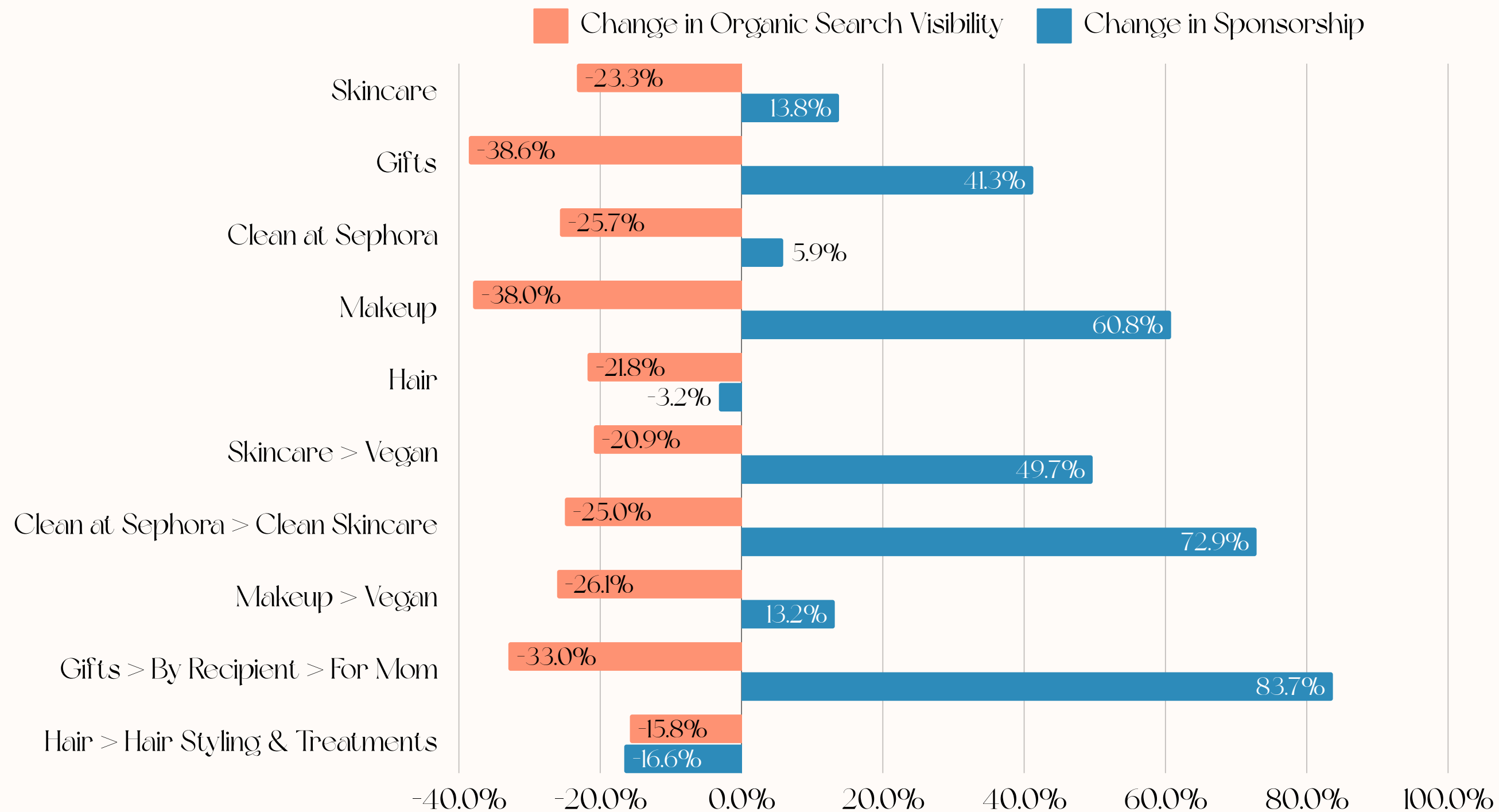
Search Performance

Sephora continues to decrease search visibility for organic placements and push their sponsored slots.

- Year-over-year, sponsored product visibility increased 22% while organic visibility decreased 28%. This is a marked difference from Ulta.com which saw a 200% increase in sponsorship activity.



All categories showed drops in organic visibility as Sephora continues to push more sponsored slots.

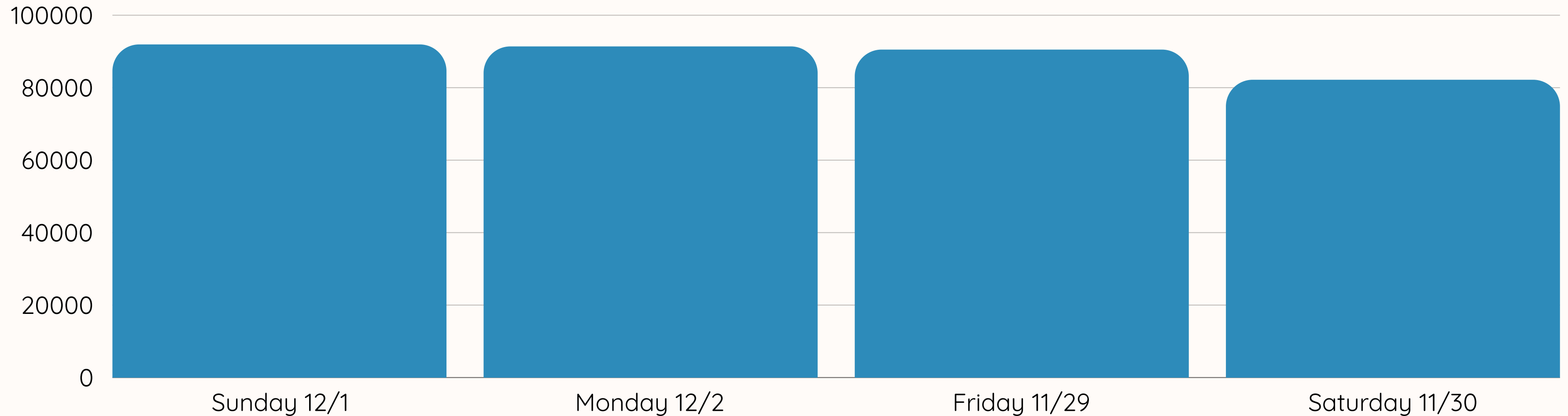


- The largest increase in sponsorship visibility was in **Gifts for Mom** at +84%.
- **Clean skincare and Makeup** showed the 2nd and 3rd highest increase in sponsorship visibility at 73% and 61%.

Sponsored Product Activity

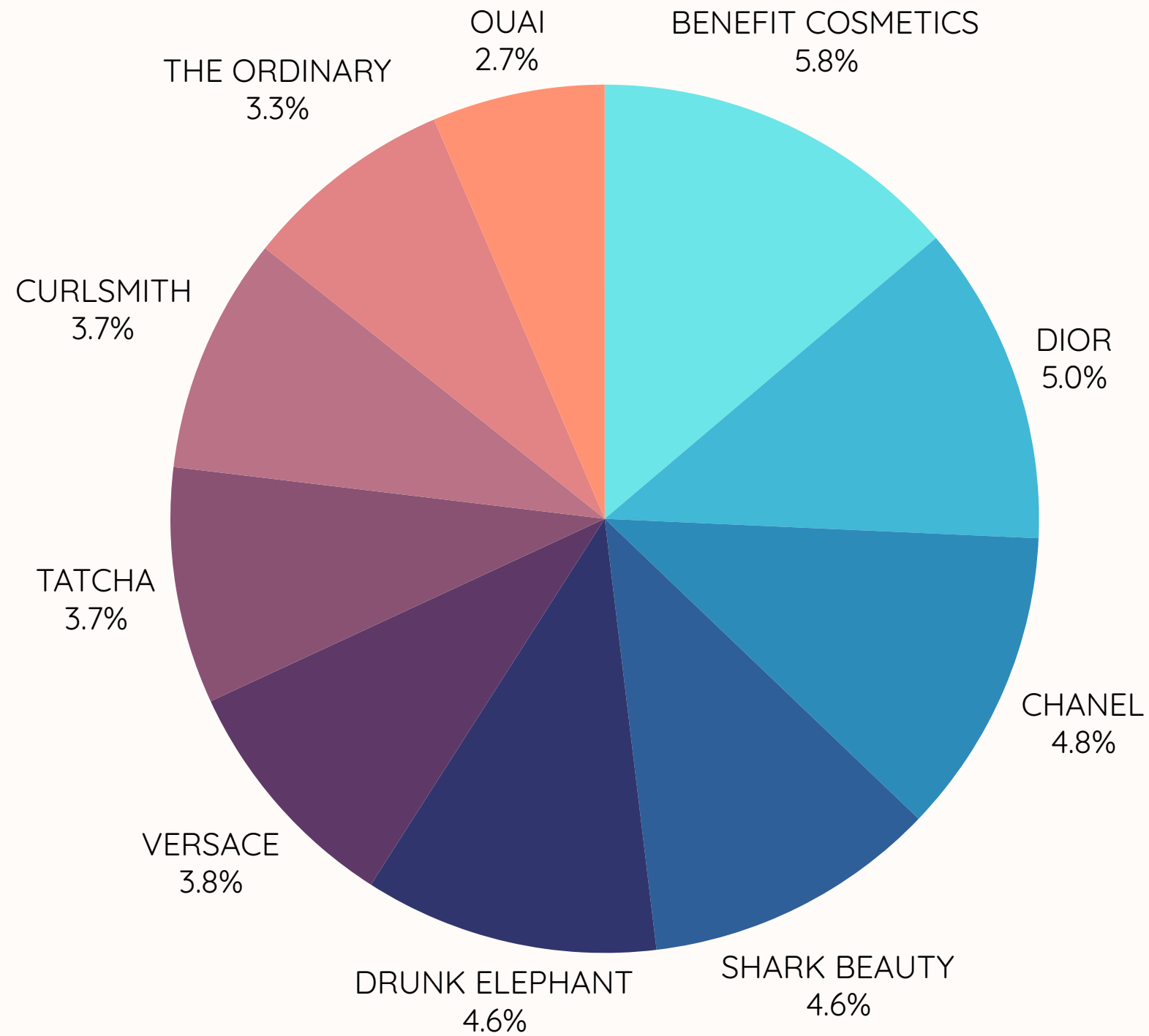
Sponsorship Activity

Number of Sponsored Products by Day



- Sponsorship Activity peaked on Sunday, Dec 1st followed closely by Cyber Monday.
- The top 5 brands with the most activity across all four days were Benefit Cosmetics, Dior, Chanel, Shark Beauty & Drunk Elephant.

Top sponsored brands BF/CM



- **The Top Brands represented 34% of all sponsored product activity** - see breakdown to the left.
- Tatcha had the most sponsored products (26) followed by Dior (25), but was #7 & #2 respectively in total activity share.
- Drunk Elephant and Curlsmith both had the fewest products (15) sponsored for the event.

#	Product	Brand	Category
1	The Dewy Skin Cream Plumping & Hydrating Refillable Moisturizer	TATCHA	Skincare
2	D-Bronzi™ Bronzing Drops with Peptides	DRUNK ELEPHANT	Skincare
3	B-Hydra™ Intensive Hydration Serum with Hyaluronic Acid	DRUNK ELEPHANT	Skincare
4	The Rice Wash Skin-Softening Cleanser	TATCHA	Skincare
5	Lala Retro™ Nourishing Whipped Refillable Moisturizer	DRUNK ELEPHANT	Skincare
6	Eros Eau de Toilette	VERSACE	Fragrance
7	24-HR Brow Setter Clear Brow Gel with Lamination Effect	BENEFIT COSMETICS	Makeup
8	BLEU DE CHANEL Eau de Parfum	CHANEL	Fragrance
9	The Homecurl Curl-Defining Styling Cream	FENTY BEAUTY BY RIHANNA	Haircare

The Top 9 sponsored products represented 19% of total sponsorship share.

- **Haircare (1 product, 1.7% share)** - Haircare was only represented through one product in the top.
- **Skincare (5 products, 13.3% share)** - Tatcha and Drunk Elephant battled it out for the top spots with Tatcha's Dewy Skin Cream coming out on top capturing 3.4% of sponsorship.
- **Fragrance (2 products, 3.6% share)** - Sephora's customer continues to shop for luxury fragrances despite economic headwinds for the retailer.

Let's discuss a partnership!

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Want a closer look at your brand's performance?
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