yipit DATA | SPATE

VIRALITY-DRIVEN BRANDS ARE TAKING A SLICE OF THE BEAUTY PIE

AUGUST 2025

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VIRAL BRANDS ARE CHANGING THE BEAUTY LANDSCAPE

In today's beauty landscape, TikTok is more than just a social platform — it's a launchpad.

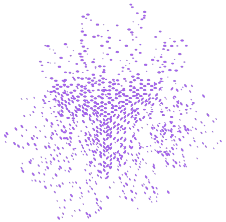
Consumer behavior is increasingly shaped by short-form content that entertains, educates, and sells. This dynamic has fueled the rise of fast-moving, **virality-driven brands** that are building massive audiences and converting that attention into real-world sales — often with impressive speed.

These brands aren't just gaining visibility — they're breaking into the top five beauty brands driving engagement growth on TikTok. And their momentum doesn't stop there. Many are successfully translating online buzz into sales on platforms like Amazon, where speed and convenience shape buying behavior.

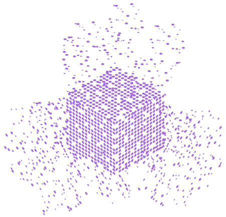
While retailers like Sephora and Ulta remain influential, more consumers are also turning to ecommerce for immediate access to what's trending. Meeting beauty shoppers where they are means blending inspiration with accessibility — and increasingly, that journey starts online.

SPATE METHODOLOGY

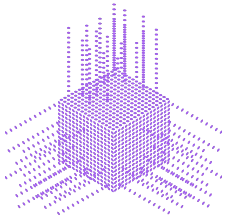
Spate is an innovative data platform that allows users to discover and detect trends across Google search and TikTok. The Spate dashboard analyzes over **20 billion search signals** and over **60 million TikTok videos** across the globe to answer three crucial questions for the consumer goods industry. What's the next big trend? Who's owning the space? How to position the trend?



20 billion search signals &
60 million posts on TikTok



Unsupervised machine
learning to identify clusters



Trends classification for
insights and implications

YIPITDATA METHODOLOGY

RETAIL AND BRANDS CHALLENGE

- Monitoring category performance across complex assortments
- Keeping up with fast-changing trends
- Identifying emerging players before they gain market share

YIPITDATA SOLUTION

- Transaction panel of over 11 M+ consumers allows visibility to all brands, including exclusives
- Near real time collection of SKU-level insights to track category shifts
- A single source of truth for assortment, pricing, and positioning

OUTCOME

- Confidently optimize assortments and pricing based on current trends
- React quickly to competitive shifts
- Make strategic decisions faster and with more accuracy

WHO ARE THE VIRALITY-DRIVEN BRANDS RESHAPING BEAUTY?

To qualify as virality-driven, a brand must meet most or all of the following criteria:

TikTok-Native Engagement:

Strong increase or growth in TikTok hashtag views related to the brand, especially relative to others in the same category.

Platform-Born or Platform-Accelerated:

Many of these brands were either born on TikTok or saw their first major commercial success in the US due to TikTok exposure. Some may have existed previously, but their breakthrough moment was clearly tied to a viral moment or creator endorsement.

Cultural Relevance vs. Heritage:

Unlike legacy brands that trade on history and institutional trust, virality-driven brands trade on speed, relatability, and digital fluency. They lean into unfiltered tutorials, dupe culture, and creator partnerships to build trust quickly.

Short-Term Fame, Long-Term Potential:

While some viral brands fade, many are now expanding beyond their moment — launching into traditional retail, expanding SKUs, and building lasting communities. This report looks at both the breakout moment and the retention challenge.

VIRAL BRANDS DEEP-DIVE PER CATEGORY

VIRALITY-DRIVEN BRANDS ARE TOP DRIVERS OF CHANGE ACROSS THEIR CATEGORIES

This section reveals how TikTok-fueled momentum is translating into real gains across the **skincare** category. From **introducing new ingredients to addressing evolving skin concerns**, these brands are redefining what it means to compete — even outpacing legacy players not just in visibility, but in market share.

SKINCARE | MAKEUP | HAIR | FRAGRANCE

MEDICUBE IS MERGING CLINICAL INNOVATION WITH TIKTOK VIRALITY

Medicube is gaining traction on TikTok by pairing dermatologist-approved products with influencer partnerships that spotlight real-time transformations. Its tech-driven, visually compelling devices fuel results-based content, helping the brand stand out as both credible and exciting — and chip away at slower-moving legacy competitors.

Anua, meanwhile, has found success by leveraging paid and commission-eligible content, turning simple, ingredient-focused products into cult favorites across TikTok's skincare community.

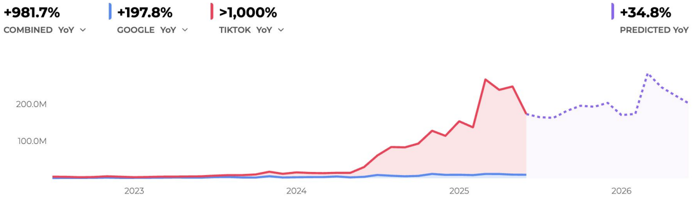
TOP 5 BRANDS BY INCREASE IN VIEWS ACROSS SKINCARE CATEGORY

Trend	Total Views	**Increase YoY↓**	YoY
Medicube (#medicube)	10.6B	**+146.9M**	>1,000%
Anua (#anua)	9.3B	**+68.8M**	+213.9%
Neutrogena (#neutrogenapartner)	16.4B	**+46.7M**	+46.9%
Aveeno (#aveenopartner)	3.8B	**+39.7M**	+169.1%
Mixsoon (#mixsoon)	3.7B	**+39.1M**	+392.4%

Source: Spate data (TikTok US, 52 weeks ending June 2, 2025 vs 52 weeks prior)

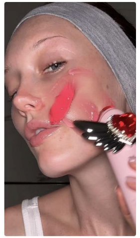
THE RISE OF MEDICUBE AND ANUA

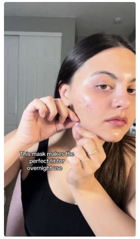
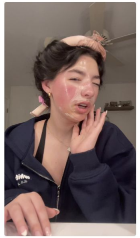
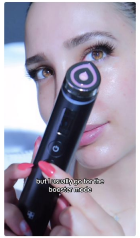
MEDICUBE POPULARITY



TOP TIKTOK POSTS FOR MEDICUBE

Total Views | Positive 1 | Mixed 3 | Negative 0 | Columns

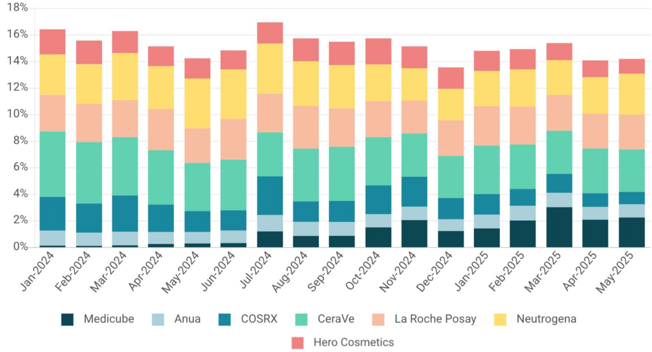


6 Paid	Paid			Paid
Total Views 56.0M	Total Views 54.4M	Total Views 53.3M	Total Views 49.3M	Total Views 46.7M
Posted May 13, 2025	Posted Apr 25, 2025	Posted Mar 26, 2025	Posted Feb 20, 2025	Posted Nov 29, 2024

SKINCARE MARKET SHARE | AMAZON (1P+3P)

United States, Online, Jan 2024 - May 2025



Yipit's data shows Medicube and Anua are gaining meaningful traction in Amazon's skincare space (1P & 3P), with Medicube in particular climbing rapidly to reach 2% of total category share as of May 2025. As these emerging brands grow, legacy staples like CeraVe and Neutrogena are losing ground—highlighting a category in flux as consumer interest shifts toward newer, buzz-driven brands.

Source: Spate Popularity Index: TikTok US - from July 2024 to June 2025 vs. July 2023 to June 2024
Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

VIRALITY-DRIVEN BRANDS ARE TOP DRIVERS OF CHANGE ACROSS THEIR CATEGORIES

This section reveals how TikTok-fueled momentum is translating into real gains across the **makeup** category. **With innovations ranging from playful formats to smart marketing**, these brands are redefining what it means to compete — often outpacing legacy players not just in visibility, but in market share.

SKINCARE | **MAKEUP** | **HAIR** | **FRAGRANCE**

SACHEU BEAUTY'S LIP LINER PEEL-OFF STAIN CHANGES THE WAY CONSUMERS INTERACT WITH MAKEUP ON TIKTOK

Sacheu Beauty's Peel-Off Lip Liner Stain has captivated TikTok users by turning a simple product into a shareable beauty ritual. The bold, peel-off format offers both visual satisfaction and long-lasting wear — a combination that's perfect for short-form content. This product isn't just going viral; it's changing how consumers engage with makeup, prioritizing fun, transformation, and storytelling over traditional application. Sacheu is proving that innovation in format, not just formula, is key to capturing Gen Z's imagination — and their wallets.

Brand Spotlight:
Sacheu Beauty

TOP 5 BRANDS BY INCREASE IN VIEWS ACROSS MAKEUP CATEGORY

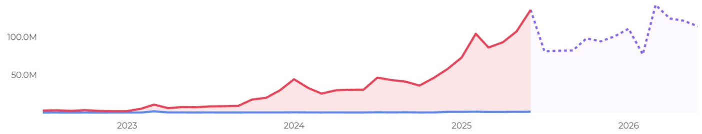
Trend	Total Views	**Increase YoY↓**	YoY
Tarte Cosmetics (#tartecosmetics)	10.3B	**+64.0M**	+165.2%
Sacheu Beauty (#sacheubeauty)	4.5B	**+61.1M**	>1,000%
L'Oreal Paris (#lorealparismakeup)	5.0B	**+53.5M**	+391.7%
Lancome (#lancomepartner)	3.6B	**+44.7M**	+259.0%
Armani Beauty (#armanibeauties)	3.0B	**+32.2M**	+410.4%

Source: Spate data (TikTok US, 52 weeks ending June 2, 2025 vs 52 weeks prior)

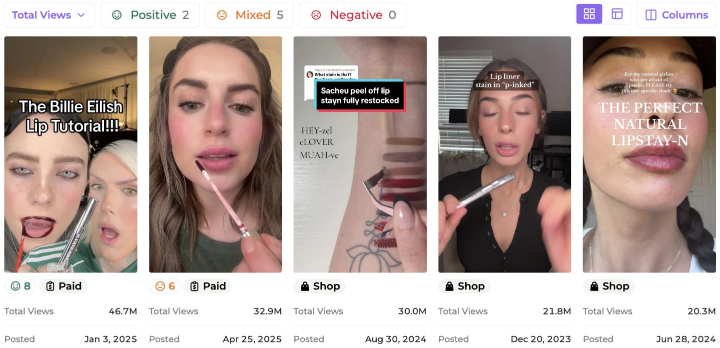
SACHEU BEAUTY GAINS LIP SHARE ON AMAZON

SACHEU POPULARITY

+206.5% COMBINED YoY | **+260.3%** GOOGLE YoY | **+206.1%** TIKTOK YoY | **+41.5%** PREDICTED YoY

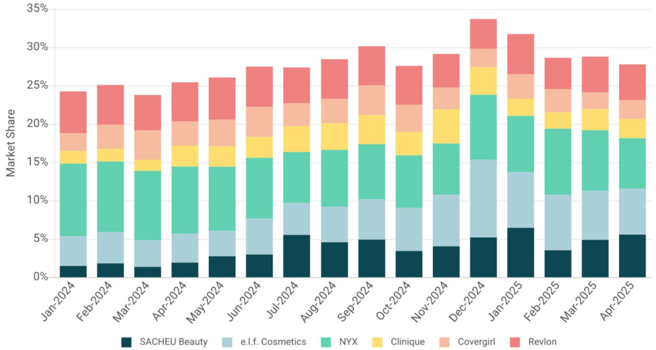


TOP TIKTOK POSTS FOR SACHEU



LIP MAKEUP MARKET SHARE | AMAZON

United States, Online, Jan 2024 - May 2025



Sacheu Beauty is gaining market share in the lip makeup category on Amazon, with a clear rise starting mid-2024 and peaking in early 2025. By March, its share rivals that of brands like NYX, e.l.f. Cosmetics, and CoverGirl — signaling that this viral brand is now a real competitor. As Sacheu rises, legacy players like Clinique and Revlon show stagnation or decline, suggesting virality can drive lasting shifts in consumer preference.

Source: Spate Popularity Index: TikTok US - from July 2024 to June 2025 vs. July 2023 to June 2024
Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

VIRALITY-DRIVEN BRANDS ARE TOP DRIVERS OF CHANGE ACROSS THEIR CATEGORIES

This section reveals how TikTok-fueled momentum is translating into real gains across the **hair** category. **From clinically proven hair care actives to benefit-led messaging**, these brands are redefining what it means to compete — often outpacing legacy players not just in visibility, but in market share.

SKINCARE | **MAKEUP** | **HAIR** | **FRAGRANCE**

WAVYTALK, KARSEELL & TYMO ARE DISRUPTING HAIR CARE THROUGH TIKTOK

Out of all beauty categories, hair care is experiencing the most visible disruption from virality-driven brands on TikTok. Brands like Wavytalk, Karseell, and Tymo are redefining consumer expectations with styling tools and treatments that deliver dramatic, camera-ready results — perfect for TikTok's transformation-obsessed format.

These brands thrive on before-and-after content, quick tutorials, and creator testimonials that highlight ease of use and professional-level results at home. With accessible pricing, striking visuals, and strategic influencer seeding, these hair brands are stealing share from legacy names and proving that virality isn't just about visibility — it's a powerful retail strategy.

TOP 5 BRANDS BY INCREASE IN VIEWS ACROSS HAIR CATEGORY

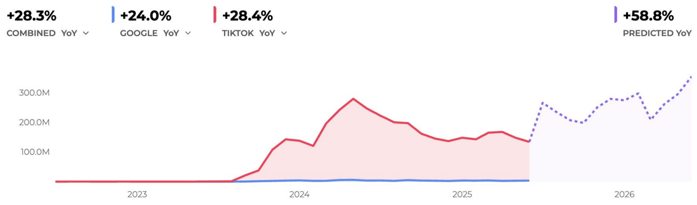
Trend	Total Views	**Increase YoY↓**	YoY
Wavytalk (#wavytalk)	27.3B	**+213.8M**	+224.9%
Karseell (#karseell)	77.2B	**+211.6M**	+73.7%
Tymo (#tymobeauty)	8.0B	**+91.0M**	+575.6%
L'Oreal Paris (#lorealparispartner)	9.6B	**+51.2M**	+111.3%
Color Wow (#colorwow)	7.2B	**+41.7M**	+161.4%

Source: Spate data (TikTok US, 52 weeks ending June 2, 2025 vs 52 weeks prior)

KARSEELL RISES AS A NEW LEADER IN HAIR MASKS

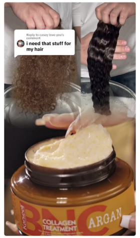
Brand Spotlight:
Karseell

KARSEELL POPULARITY



TOP TIKTOK POSTS FOR KARSEELL

Total Views | Positive 0 | Mixed 0 | Negative 1 | Columns



Total Views 68.4M
Posted Jan 9, 2024

Total Views 66.4M
Posted Apr 30, 2024

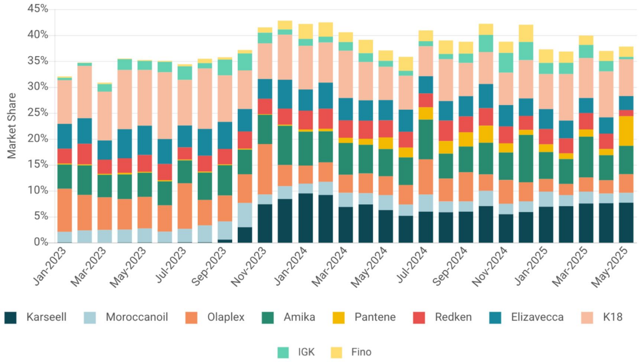
Total Views 58.2M
Posted Jan 10, 2024

Total Views 57.9M
Posted Aug 19, 2023

Total Views 55.0M
Posted Nov 2, 2023

HAIR MASK MARKET SHARE | AMAZON

United States, Online, Jan 2023 - May 2025



Karseell has emerged as a standout in Amazon's hair mask category, steadily growing share and outperforming legacy brands like Olaplex and Moroccanoil, both of which have lost ground. Its rise reflects broader hair care trends, with shoppers increasingly seeking out new, innovative brands and targeted treatment solutions.

Source: Spate Popularity Index: TikTok US - from July 2024 to June 2025 vs. July 2023 to June 2024
Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

VIRALITY-DRIVEN BRANDS ARE TOP DRIVERS OF CHANGE ACROSS THEIR CATEGORIES

This section reveals how TikTok-fueled momentum is translating into real gains across the **fragrance** category. **From affordable dupes to the rise of scent layering**, these brands are redefining what it means to compete — often outpacing legacy players not just in visibility, but in market share.

SKINCARE | **MAKEUP** | **HAIR** | **FRAGRANCE**

LATTAFA IS A BREAKOUT WINNER IN THE FRAGRANCE CATEGORY

As TikTok has turned fragrance into a mainstream obsession — with scent reviews, layering hacks, and "perfume personalities" becoming viral content formats — brands like Lattafa have emerged as major winners.

Lattafa, known for its affordable dupes of luxury scents, has captured the attention of scent-savvy TikTok users looking for high-impact fragrance at accessible prices. The brand's viral rise is fueled by creator reviews that compare Lattafa products to prestige perfumes, positioning it as a smart, stylish alternative for cost-conscious consumers.

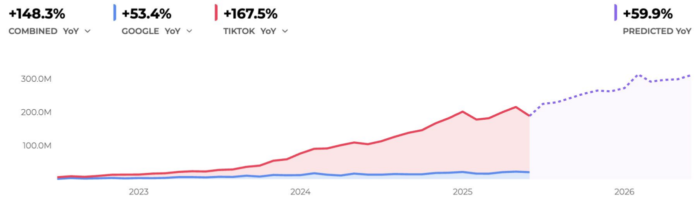
TOP 5 BRANDS BY INCREASE IN VIEWS ACROSS FRAGRANCE CATEGORY

Trend	Total Views	Increase YoY↓	YoY
Lattafa (#lattafa)	2.3B	**+21.4M**	+253.5%
Armani Beauty (#armanibeautypartner)	1.1B	**+17.9M**	>1,000%
Phlur (#phlur)	1.3B	**+13.7M**	+549.3%
Jean Paul Gaultier (#jeanpaulgaultier)	2.6B	**+12.5M**	+98.1%
Parfums De Marly (#parfumsdemarly)	1.0B	**+4.8M**	+137.1%

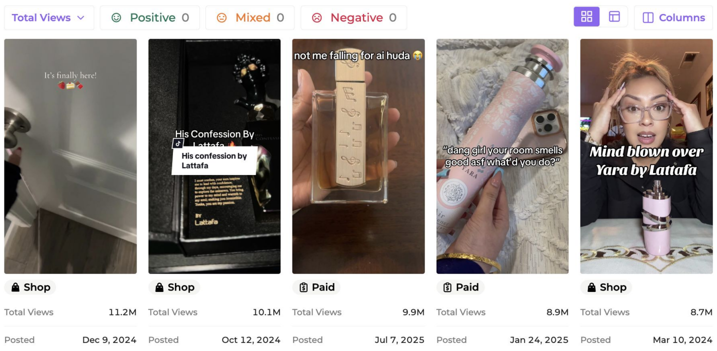
Source: Spate data (TikTok US, 52 weeks ending June 2, 2025 vs 52 weeks prior)

LATTAFA SURPASES LEGACY BRANDS ON AMAZON

LATTAFA POPULARITY

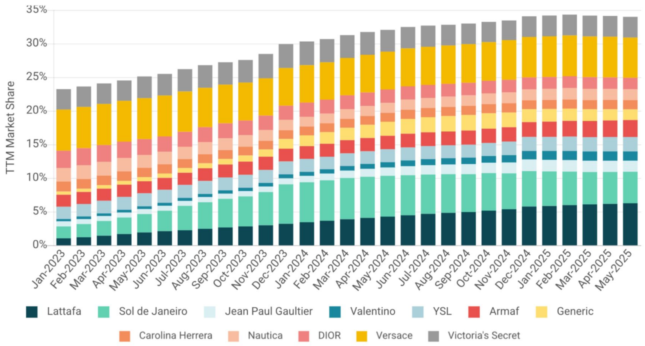


TOP TIKTOK POSTS FOR LATTAFA



FRAGRANCE MARKET SHARE | AMAZON (1P+3P)

United States, Online, Jan 2023 - May 2025



Lattafa is rapidly gaining ground on Amazon, with its fragrance market share more than doubling from early 2023 to early 2025. As of March 2025, it ranks among the top brands—competing with names like Sol de Janeiro, Jean Paul Gaultier, and Versace. Its rise, fueled by TikTok buzz, contrasts with stagnant growth for legacy brands like Nautica, signaling a shift toward affordable, viral-driven alternatives.

Source: Spate Popularity Index: TikTok US - from July 2024 to June 2025 vs. July 2023 to June 2024
Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

VIRALITY-DRIVEN BRANDS GAIN SHARE, BUT SUSTAINING MOMENTUM ISN'T GUARANTEED

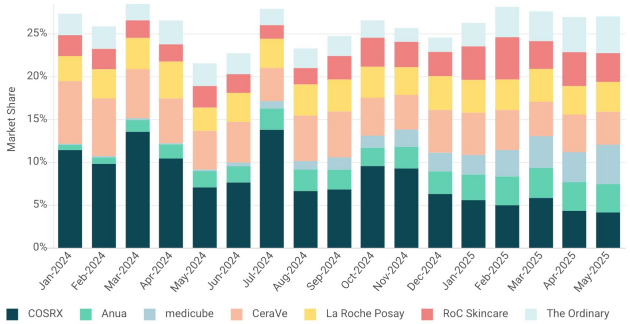
While virality-driven brands are successfully disrupting the market and capturing share from legacy players, sustaining that growth is a different challenge. This section explores case studies of some brands that experienced a sharp spike in interest and sales following viral moments — but struggled to maintain that momentum over time. Despite initial success, staying top-of-mind and continuing to grow requires more than just buzz — it demands repeat purchase behavior, brand loyalty, and continued innovation.

THE RISE AND FALL OF COSRX

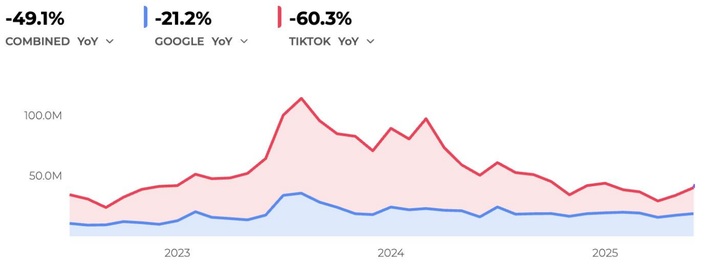
COSRX entered 2024 as a clear leader in Amazon's facial serums category, maintaining a strong position through the early months of the year. However, its share began to taper off by mid-2024 and remained on a gradual decline into 2025, suggesting the brand's viral momentum — fueled in part by the popularity of snail mucin — may have plateaued. As COSRX lost share, both Medicube and Anua gained traction, each expanding their footprint through the first half of 2025. This shift reflects a potential evolution in the category, as shopper interest appears to be moving from one-hit viral standouts to science-driven and routine-building serum solutions.

FACIAL SERUMS MARKET SHARE | AMAZON

United States, Online, Jan 2024 - May 2025



COSRX POPULARITY



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Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

Brand Spotlight: Unbrush

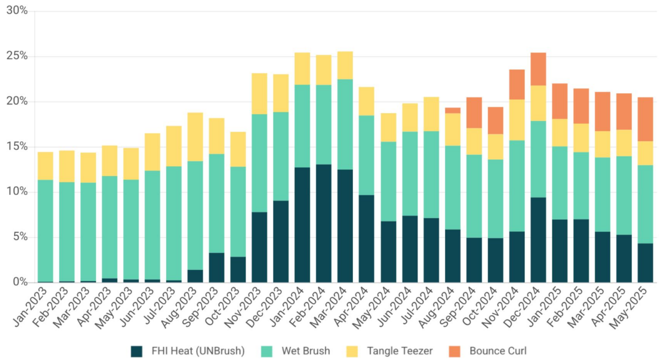
UNBRUSH'S VIRAL RISE & FADING IMPACT

Launched by FHI Heat, Unbrush entered the market with a viral push on TikTok in late 2023, disrupting the long-standing dominance of Wet Brush and quickly climbing to the top of Amazon's market share rankings by early 2024.

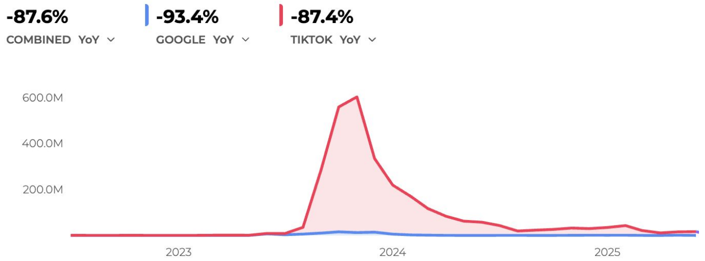
However, the surge was short-lived. By spring 2024, Unbrush began to lose share, and despite a modest holiday rebound, both TikTok interest and market presence continued to decline into mid-2025 — highlighting the challenge of turning virality into lasting success.

HAIR BRUSHES & COMBS MARKET SHARE | AMAZON (1P+3P)

United States, Online, Jan 2023 - May 2025



UNBRUSH POPULARITY



Source: Spate Popularity Index: TikTok US - from July 2024 to June 2025 vs. July 2023 to June 2024
Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

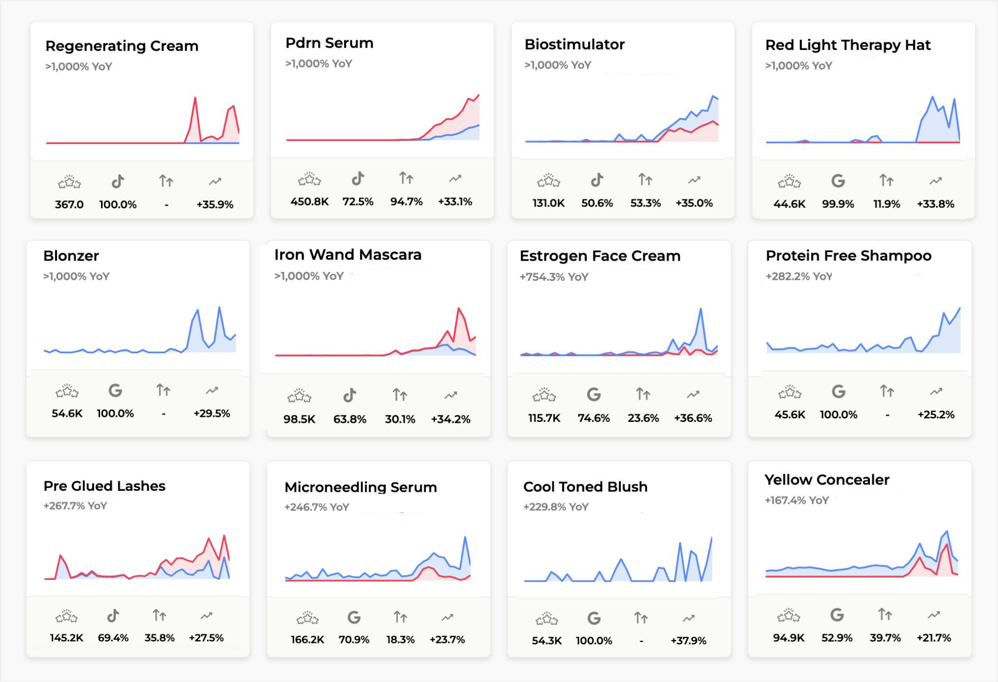
WHAT DOES THIS MEAN FOR BEAUTY BRANDS?

IDENTIFY NEW PRODUCT OPPORTUNITIES BASED ON CONSUMER TRENDS

Spotting Growth Areas: New Up-and-Coming Product Territories Primed for Virality

Using Spate data, brands can identify new areas for innovation that are gaining traction with consumers.

By analyzing the fastest-growing trends year-over-year across TikTok and Google, this data helps brands pinpoint where consumer attention is shifting. These emerging product spaces offer a launchpad for innovation and reveal strategic whitespace for brand expansion. For brands already riding a wave of viral success, tapping into rising trends is a powerful way to sustain momentum — channeling that initial spark to guide audiences toward the next up-and-coming product



Source: Spate Popularity Index: TikTok US - from July 2024 to June 2025 vs. July 2023 to June 2024

IDENTIFY NEW PRODUCT OPPORTUNITIES BASED ON CATEGORY TRENDS

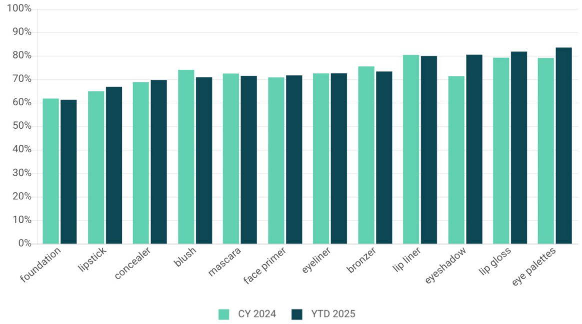
Spotting Growth White Space: Where Can Emerging Brands Fit In

Top brand concentration varies across categories. Eye palettes, lip liner, and lip gloss are dominated by top players, with the top 10 brands holding ~80% share. Foundation, on the other hand, is more fragmented (~60% share), suggesting more room for emerging brands to gain traction.

TAKEAWAY: Fragmented categories offer more space for growth; highly concentrated ones may require stronger differentiation to break through.

SALES CONCENTRATION AMONG TOP BRANDS | SEPHORA

United States, Omnichannel, CY 2024 -June 2025



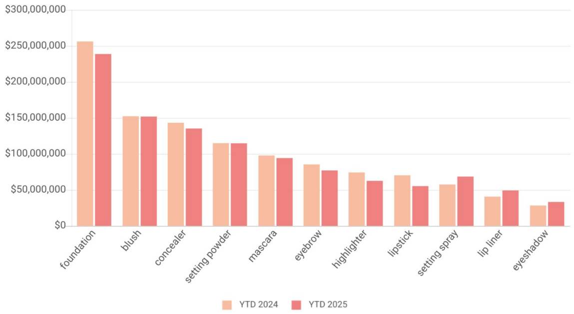
Tracking Spend Migration: Follow the Subcategory Demand Shift

Spend is shifting away from core complexion products (foundation, concealer) toward expressive and finishing categories like setting spray, eyeshadow, and lip liner. These products support creativity and routine customization.

TAKEAWAY: Brands that anticipate subcategory trends can win early and stay ahead of evolving shopper routines.

MAKEUP SUBCATEGORY SPEND | SEPHORA

United States, Omnichannel, YTD 2024 & 2025 (Through June)



Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

CASE STUDY

BLUSH MOMENTUM: ANTICIPATING THE RIGHT SUBCATEGORY

Blush has emerged as a breakout category—proof that tracking subcategory shifts can uncover major brand opportunity. Top collections span formats like powders, creams, stains, and jelly tints, reflecting demand for both versatility and sensory innovation:

Leaders like Patrick Ta and YSL are winning with dual-format and luxury positioning, while Milk and Benefit show how innovation in texture and tone can reignite shopper interest—Benefit's iconic Benetint, in particular, is seeing renewed momentum thanks to shade expansion and the broader resurgence of stain formats.

Takeaway: Blush's rise shows the power of early subcategory bets—but brands also need to lead with format innovation to stand out and sustain momentum.

TOP BLUSH COLLECTION AT SEPHORA (GMV $ | YTD 2025)

United States, Omnichannel, Sephora, YTD '25 (Data through June)

#1	#2	#3	#4	#5
Patrick Ta	**Rare Beauty**	**Yves Saint Laurent**	**Milk Makeup**	**Benefit**
Major Headlines Crème & Powder Blush Duo	Soft Pinch Liquid Blush	Make Me Blush 24H Buildable Powder Blush	Cooling Water Jelly Tint Lip + Cheek Blush Stain	Benetint Liquid Lip + Cheek Blush Stain

Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

BRAND TAKEAWAYS

- Identify areas of opportunity based on new up-and-coming shifts in consumer interests
- Identify areas of opportunity based on category dynamics and shifting shopper spending patterns
- Maintain momentum through new launches and continuous innovation

WHAT DOES THIS MEAN FOR RETAILERS?

The rise of virality-driven brands is reshaping not just what consumers buy—but where they shop. Shoppers discovering buzzy brands through platforms like TikTok are increasingly turning to Amazon for speed and convenience. As a result, spend is steadily shifting away from traditional beauty retailers like Sephora and Ulta.

This section explores how viral brand momentum on Amazon is triggering broader behavior shifts, challenging legacy players to adapt in a landscape increasingly defined by discovery-led demand.

Shoppers Choose Amazon Over Retail for Viral Brands

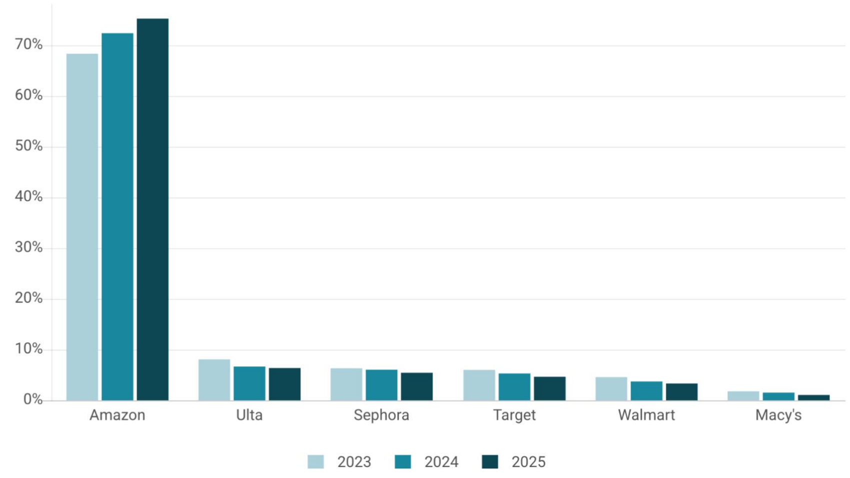
Consumers who shop viral, trend-driven beauty brands are increasingly turning to Amazon. From 2023 to 2025, Amazon's share of spend among this cohort grows from under 70% to over 75%, while traditional retailers like Ulta, Sephora, Target, and Walmart see a steady decline.

This shift highlights Amazon's strength in serving fast-moving, discovery-led demand—especially for brands that gain traction through TikTok and social virality.

Takeaway: For viral brands, Amazon offers unmatched reach, speed, and availability—making it a natural launchpad for early momentum.

SHARE OF BEAUTY SPEND BY RETAILER | SHOPPERS OF TIKTOK NATIVE BRANDS

United States, Omnichannel, 2023 - 2025



Note on methodology: This data reflects GMV share by retailer among beauty shoppers who purchased from at least one of the following trend-driven brands: Anua, Beauty of Joseon, LAMBENA, MCoBeauty, Medicube, Mixsoon, Simpletics, TIRTIR, and Wavytalk. Analysis includes transactions from 2023 onward across key beauty categories (makeup, skincare, fragrance, hair) and focuses on Amazon, Ulta, Sephora, Target, Walmart, and Macy's.

Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

Amazon Fuels Growth, But Omnichannel Drives Longevity

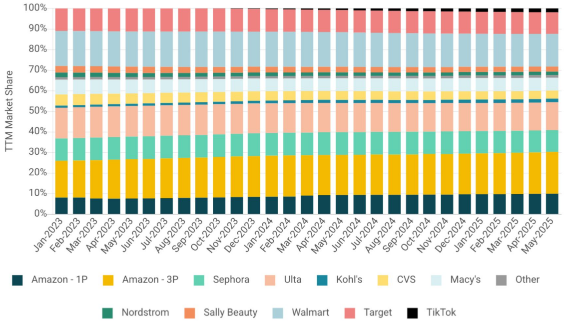
Zooming out beyond viral brand shoppers, the broader beauty landscape tells a more balanced story. While Amazon now holds nearly 30% of beauty and skincare share and continues to grow, brick-and-mortar still commands the majority of spend.

Retailers like Ulta, Sephora, and Target remain critical destinations—particularly in skincare, where shopper loyalty and in-store experience play a bigger role. In 2025, we will see viral brands like rhode and Beauty of Joseon expand into Sephora — a strategic move aimed at sustaining momentum and unlocking growth beyond Amazon by meeting consumers wherever they shop.

Takeaway: Amazon remains a key growth driver, but brands that embrace omnichannel strategies—pairing online dominance with brick-and-mortar presence—are best equipped to sustain momentum and expand reach.

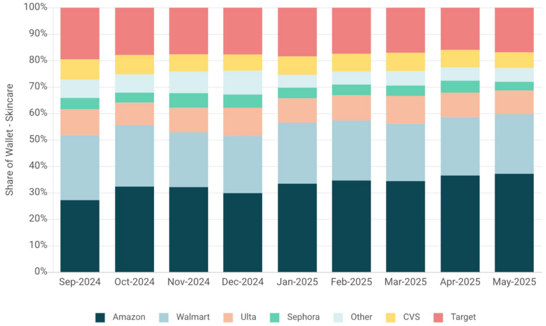
BEAUTY CATEGORY MARKET SHARE BY RETAILER

United States, Omnichannel, Jan 2023 - May 2025



SKINCARE SHARE OF WALLET

United States, Omnichannel, Sep 2024 - May 2025



Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

CASE STUDY

SHOPPER INSIGHTS BEHAVIOR REVEALS RETAILER OPPORTUNITY

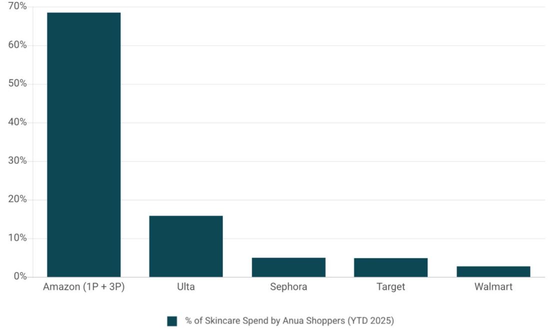
In 2025, 68% of Anua's prior-year shoppers were buying skincare on Amazon—while many were also active at Ulta and Sephora. This highlights that even Amazon-loyal shoppers are often shopping multiple retailers across the category.

Before Anua's Ulta launch in February 2025, its Amazon shoppers were already purchasing similar efficacy-led brands at Ulta—like The Ordinary, La Roche-Posay, and Good Molecules—showcasing strong category and brand alignment.

Takeaway: Retailers can use cross-retailer shopping patterns to anticipate demand. Anua's Amazon shoppers were already engaged with efficacy-led skincare brands at Ulta, making them a natural audience for conversion once Anua launched in-store.

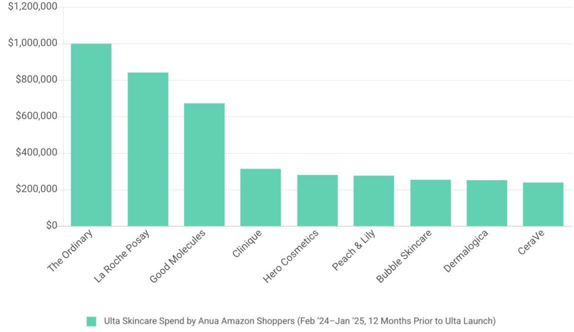
2025 SKINCARE SPEND BY RETAILER | 2024 ANUA SHOPPERS

United States, Omnichannel, Jan 2024 - May 2025



ULTA SKINCARE BRAND SPEND | ANUA AMAZON SHOPPERS

United States, Omnichannel, 12M Pre-Launch, Feb 2024 - May 2025



Source: YipitData E-Receipt Data, In-Store Receipt Data, Credit/Debit Card Data, and Webscraped Data

CASE STUDY

USING DATA TO SPOT VIRALITY-DRIVEN BRANDS

Boots leveraged Spate's trend data to identify and distribute ~25 virality-driven brands in the UK market. These brands, discovered through early search and social signals, quickly became top sellers — with half of them currently out of stock due to overwhelming demand. By proactively stocking emerging brands, Boots not only capitalized on rising consumer interest but also made it convenient for shoppers to purchase trending products directly through their stores. This approach is critical for retailers looking to compete with platforms like Amazon and retain consumer wallet share in a landscape increasingly shaped by viral discovery.

Implications — retailers need to monitor top trending brands, continue to adapt, and make these brands more accessible to consumers.

RETAILER TAKEAWAYS

- Use cross-shopper insights to reach new customers
- Spot viral brands early using digital signals
- Build flexible shelves that evolve with trends

THE RISE — AND CHALLENGE — OF VIRALITY-DRIVEN BEAUTY

A new wave of virality-driven brands is reshaping the beauty landscape, rapidly capturing market share by tapping into social buzz and consumer curiosity. These brands are not just disrupting category leaders—they're also changing how consumers shop, with platforms like Amazon becoming key destinations for impulse and trend-driven purchases over traditional retailers.

However, while these brands are making a splash, sustaining that momentum remains a major challenge. Many struggle to translate early hype into long-term loyalty, leading to a cycle where market share is constantly being traded among the latest viral hits.

For retailers, the message is clear: Make space for virality-driven brands or risk losing relevance to more agile distribution platforms. And for brands, the opportunity lies in not only harnessing virality to drive initial discovery but also in converting experimental shoppers into devoted customers through smart retention strategies. The next phase of growth will belong to those who can turn fleeting trends into lasting relationships through consistent product innovation and omni channel strategies.

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VIRALITY-DRIVEN BRANDS ARE TAKING A SLICE OF THE BEAUTY PIE

AUGUST 2025