

Ulta vs. Sephora Path-to-Purchase

Despite endless disruption at retail, in-store beauty shopping isn't going away anytime soon. Our recent survey of how women shop beauty found that 13% shop in-store only, 1% shop online only, and the majority—86%—shop both in-store and online.

Knowing that the omnichannel beauty consumer is buying products everywhere, we took a look at her in-store path to purchase when it comes to Ulta and Sephora. Learn more about the full study, which includes how women buy beauty across channels, from mass to Amazon.

ULTA VS. SEPHORA: THE BRICK-AND-MORTAR BATTLE IS TIGHT

When we asked women where they shop for beauty, we found...



69%

purchase beauty products from Ulta
(20% say they purchase at Ulta most often)



66%

purchase beauty products from Sephora
(18% say they purchase at Sephora most often)

TESTING, 1, 2, 3... SEPHORA!

Testing/sampling was cited as the #1 reason women shop at either store, but Sephora leads when it comes to the ease of in-store sampling:



71%

of women shop for beauty products at Sephora most often because they can **test/sample** products easily
(vs. 53% of Ulta shoppers)

SEPHORA SELECTION: ALL ABOUT THE BEAUTY

While shoppers turn to Ulta for a wider variety of products, Sephora wins customer loyalty through their specific beauty selection:

53% say that Sephora carries the **largest selection of beauty products**
(vs. 46% of Ulta shoppers)

38% shop at Sephora because it carries their **brand of beauty products**
(vs. 28% of Ulta shoppers)

ULTA: VALUE AND SELECTION

When it comes to the motivating factors for shopping at one retailer more often than another, Ulta leads in price and variety of personal care products:



42% say Ulta is a **one-stop shop** for products beyond beauty
(vs. 25% of Sephora shoppers)



27% cite **best sale prices** for beauty products at Ulta
(vs. 11% of Sephora shoppers)



32% shop at Ulta because it has the **best prices** on products
(vs. 21% of Sephora shoppers)



23% say that Ulta has the **best everyday prices** for beauty products
(vs. 10% of Sephora shoppers)

WHAT'S UP WITH THE IN-STORE ASSOCIATE?

Supporting stats suggest Ulta and Sephora shoppers share a similar sentiment toward the knowledge and helpfulness of in-store associates, but Ulta shoppers are nearly 3x as likely to describe these employees as not pushy:



22% of Ulta shoppers think that **store associates are not pushy** (vs. 8% of Sephora shoppers)

21% think Ulta store employees are **knowledgeable** (vs. 20% of Sephora shoppers)

18% say Sephora store associates can **recommend products** (vs. 16% of Ulta shoppers)