



Executive Summary

2025 marked the third year of Amazon's Summer Beauty Event (formerly known as Summer Beauty Haul). The event ran for 2 weeks, from April 28 through May 11, and featured a mix of mass and premium beauty deals along with daily rotating offers. This review encompasses the competitive landscape, product trends, and insights on media and sales performance.



Competitive Landscape

Amazon's Summer Beauty Event occurred within a crowded promotional environment, as multiple major beauty retailers launched concurrent campaigns. Notable overlapping promotions included:

- Sephora launched its "Oh Hair Yeah" event from April 29 to May 10, featuring rotating daily deals of up to 50% off select haircare products.
- **Ulta** ran its "Perfect Pairs" promotion from May 5 to May 11, offering discounts when customers purchased two or more haircare items from the same brand.
- **Walmart** began its "Spring Beauty Event" on April 18, extending through the end of May. This promotion coincided with the rollout of in-store Beauty Bars at 40 locations and continued investment in their premium beauty assortment—positioning Walmart as an increasingly relevant competitor in both mass and prestige beauty categories.

Key Takeaways

To account for parallel promotions and retail noise, future Amazon event strategies should focus on:

- ✓ Emphasizing assortment differentiation
- ✓ Brand storytelling
- ✓ Enhanced pre- and post-event targeting

Note: The data and insights above are based on aggregated data from Podean's US beauty clients. Lead-in period references the 2 weeks before the event (4/14 - 4/27). Participating ASINs encompasses all products that had an active discount during all or part of the event.



Product & Category Trends

✓ Sunscreen

Search interest in “sunscreen” rose **12% in the last 30 days**, with SPF-related keywords improving in **Search Frequency Rank (SFR)** across the board — likely driven by seasonal demand and early summer prep.

✓ Travel Sizes

Mini formats of top products outperformed their full-size counterparts, offering a strong entry point for new-to-brand (NTB) customers.

✓ TikTok Trends

- African Net Sponges saw a sharp week-over-week increase in SFR and notable jumps in Best Seller Rank (BSR), despite minimal discounting, showcasing the impact of social trends and virality on purchasing behavior.
- K-Beauty brands saw strong performance, with BioDance’s Hydrogel Masks reaching #1 in Beauty & Personal Care (driven by a 20% discount and viral traction), and Medicube’s hero SKUs maintaining a top 100 SFR position in the second week of the event.

Key Takeaways

The Summer Beauty Event serves as a strong BSR, SFR, and organic ranking accelerator ahead of Prime Day. Promotional participation can lift visibility, especially when layered with the following strategies:

- ✓ Discounting travel-size SKUs presents an effective way to drive trial and boost NTB performance, while also opening the door for remarketing, especially in competitive or premium categories.
- ✓ Leaning into emerging TikTok trends (e.g., skincare tools, niche formats) and seasonality when pre-event planning to ensure high-demand items are retail-ready and featured.



Media & Sales Impact

Products with active discounts during the event saw significantly higher click and impression volume, resulting in a larger share of overall media spend. While promotional pricing drove an increase in CVR, increased spend often outpaced sales gains.

- Participating ASINs saw a 218% increase in media spend and a 194% lift in traffic, outpacing non-participating products, which saw declines across both metrics. Click and impression volume increased, resulting in participating products accounting for a larger portion of overall media spend.
- Despite flat CPCs and a 15% increase in media CVR, participating ASINs saw RoAS decline slightly as sales gains (+132%) did not fully offset increased media spend. Total CVR fell by 25%, skewed by the large influx of traffic driven by both paid media as well as additional organic placements.
- Non-participating ASINs saw a 12% drop in spend, 3% drop in media sales, and no media CVR lift

Key Takeaways

- ✓ Ensure discount and media strategies are closely aligned to maximize results during deal events.
- ✓ Run deals or discounts when possible to take advantage of increased traffic and improve conversion.

