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R E P O R T

BEAUTY & WELLNESS INDEX 2025

How consumers discover, evaluate, and buy beauty in a guided-first world

Executive Overview

The Beauty & Wellness Index 2025 analyzes millions of anonymized AI-powered skincare and makeup interactions across 100+ global brands and multi-brand retailers. The data shows a fundamental shift in how beauty is discovered and purchased.

Three macro themes defined the year:

- Guided diagnostics are now the primary entry point to beauty discovery
- Engagement depth matters more than speed, particularly in skincare
- Brands and retailers follow different conversion logics — but both benefit from guided, personalized journeys

Across categories, selfie-based diagnostics and virtual try-on outperform non-guided paths, driving higher completion, stronger intent, and better-qualified traffic.

Key Industry Benchmarks — Beauty & E-Commerce in 2025

Here's how our performance compares with broader industry contexts:

Health & Beauty average e-commerce conversion (2025):

5.1% Industry average across 2025 based on aggregated data. (Dynamic Yield, Master Card data). Beauty & skincare products tend to have higher conversion than luxury or electronics due to lower price and faster purchase decisions.

Benchmarks to check against Revieve's data:

~5% Revieve's checkout rate ~5% aligns with the upper end of industry benchmarks.

~72% completion

~14% Add-to-cart

2–5% CVR

Add-to-cart (~14%) and completion (~72%) are strong signals vs typical e-commerce patterns (CVR 2–5% is global average in many categories).

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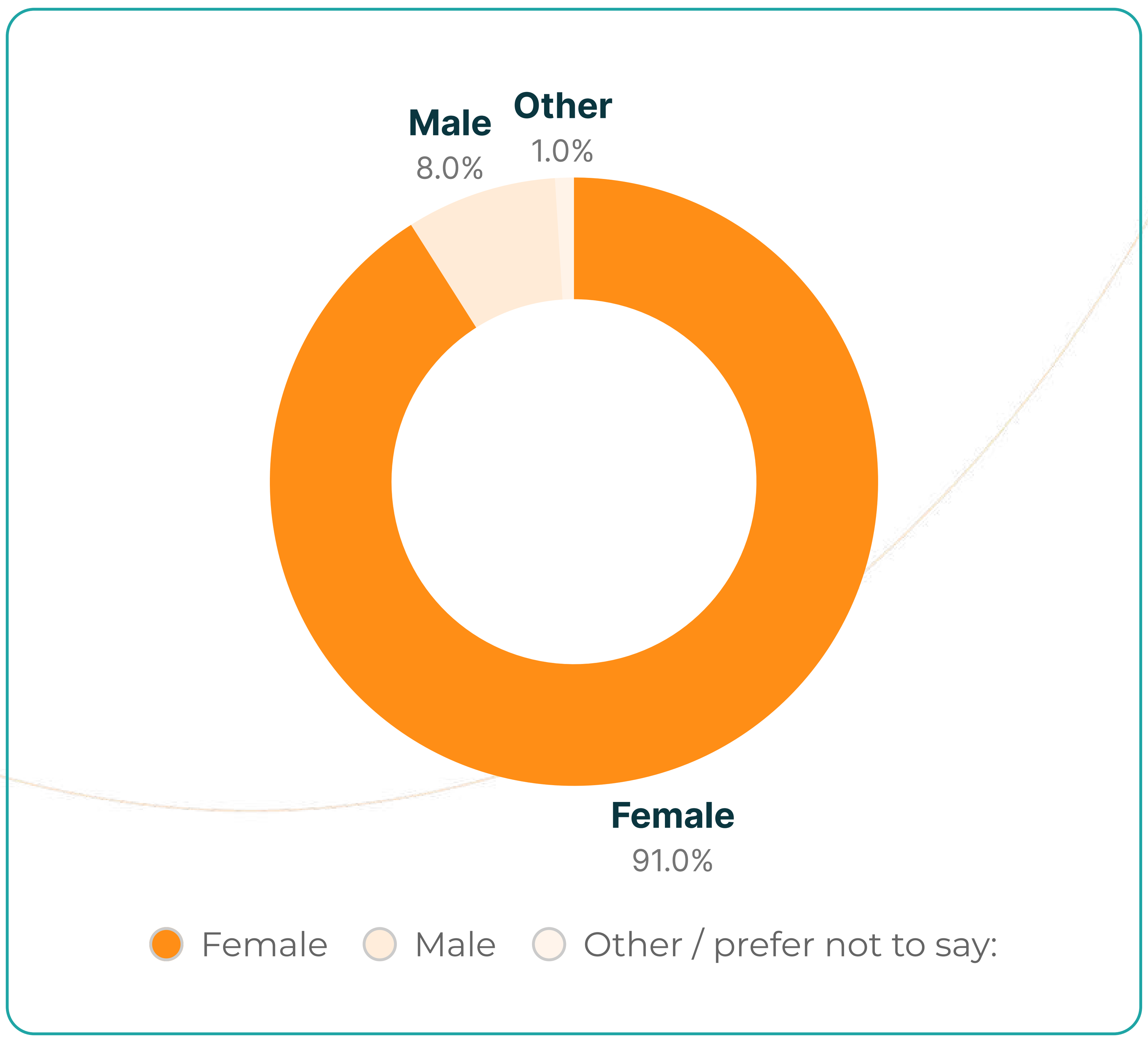
01

Consumer Profile & Skin Intelligence

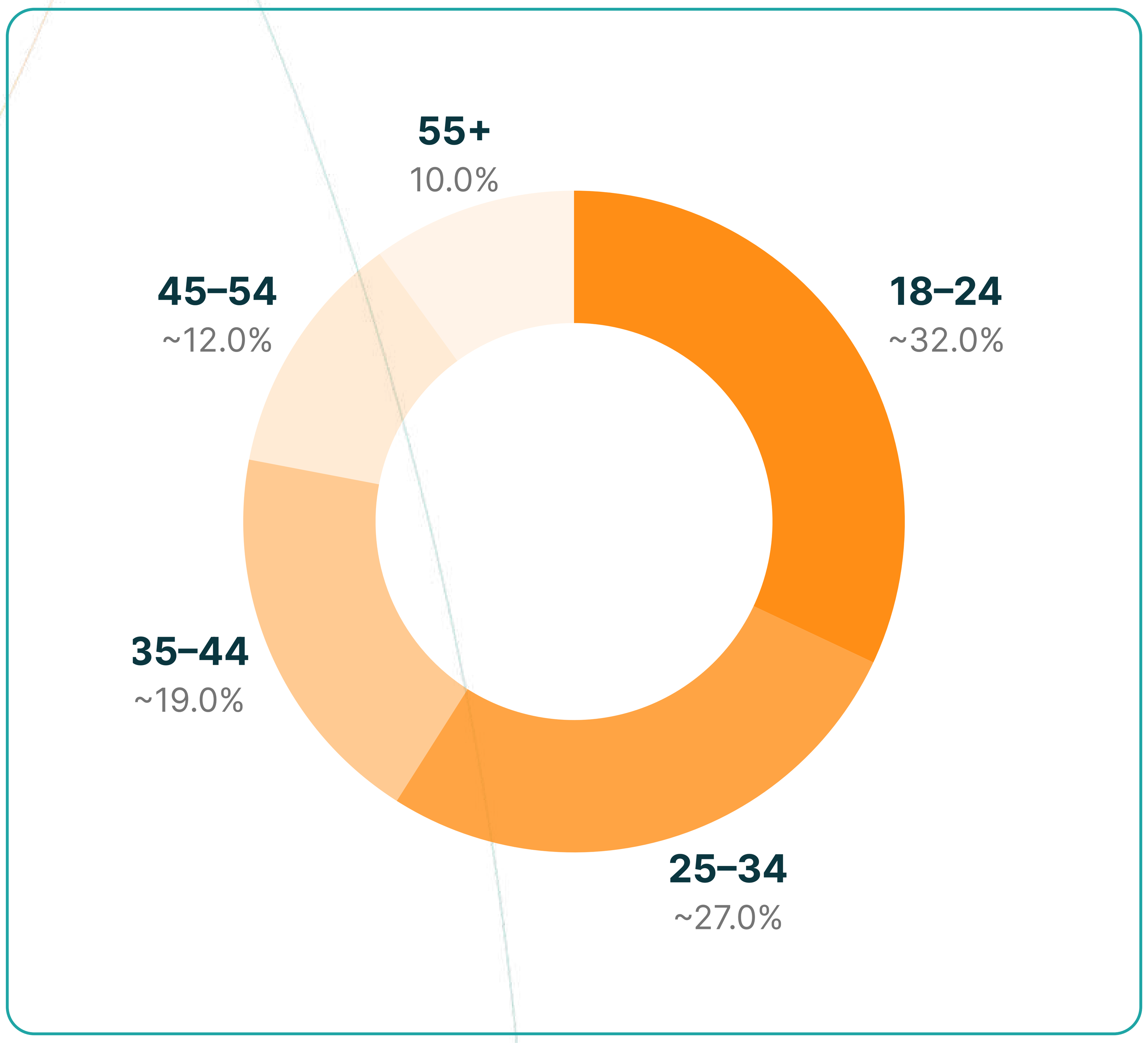
Demographic Snapshot

Beauty engagement in 2025 remains predominantly **female and digitally native**:

Gender



Age Distribution

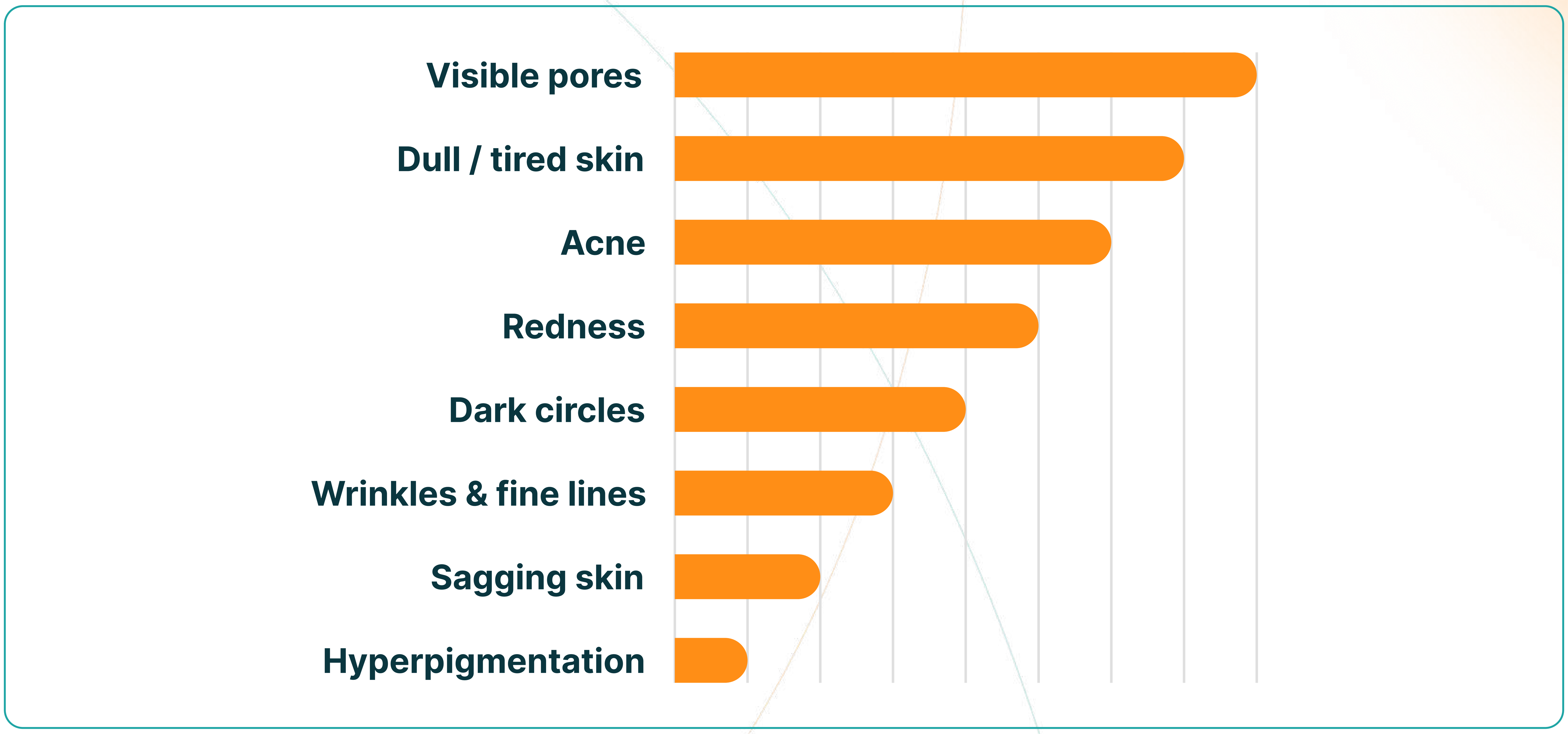


Younger users dominate initial engagement, but meaningful participation spans all adult age groups, particularly in skincare diagnostics.

Skin Concerns: What Consumers Care About Most

Across brands and retailers, skin concerns remain remarkably consistent:

Top Skin Concerns (Ranked)

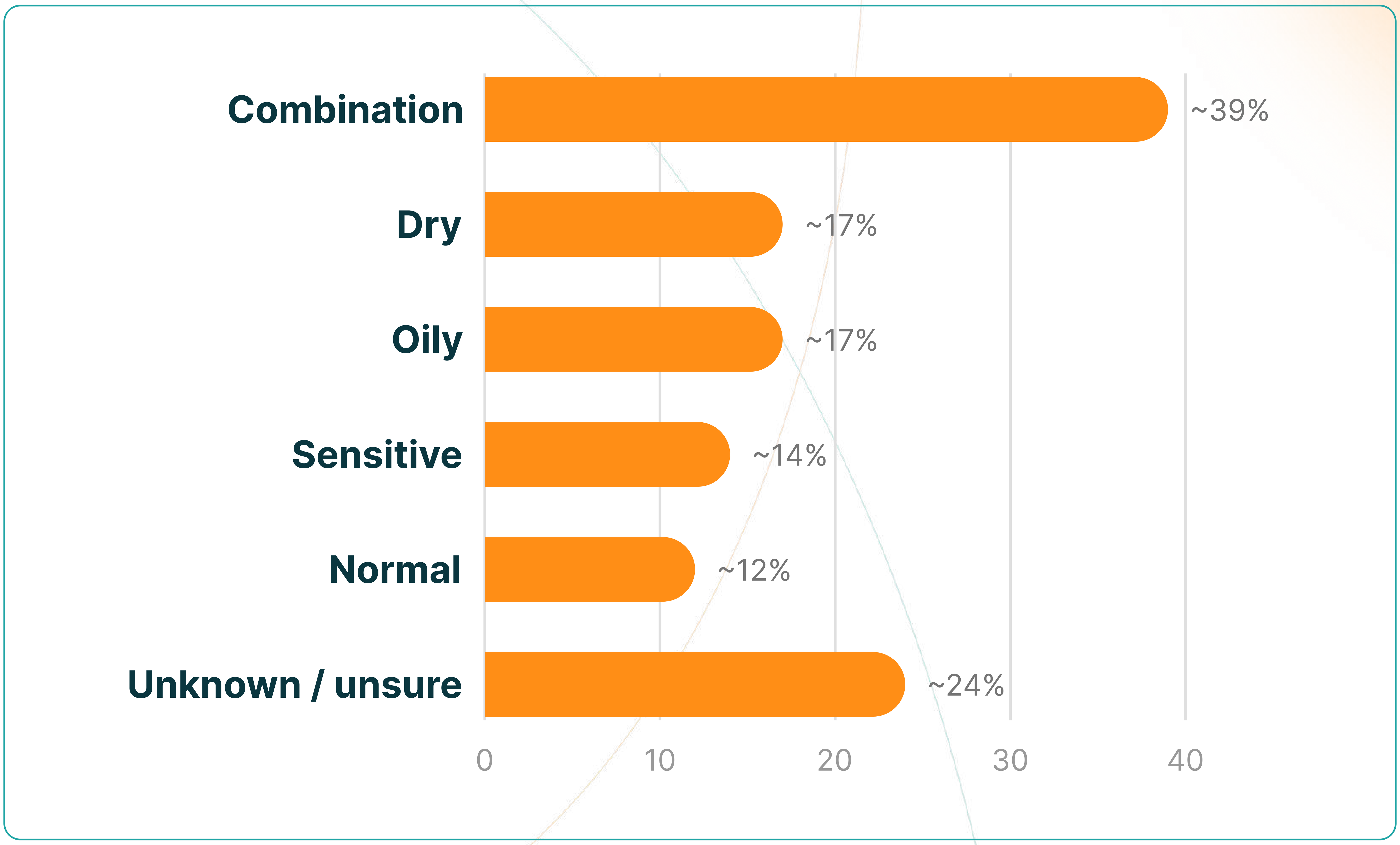


Rather than single-issue shopping, users increasingly present multi-concern profiles, reinforcing the need for routines, regimens, and education over hero-SKU selling.

Skin Type Distribution

Skin type awareness continues to improve, though uncertainty remains high:

Top Skin Concerns (Ranked)



~39% Combination	**~17%** Dry	**~17%** Oily
~14% Sensitive	**~12%** Normal	**~24%** Unknown / unsure

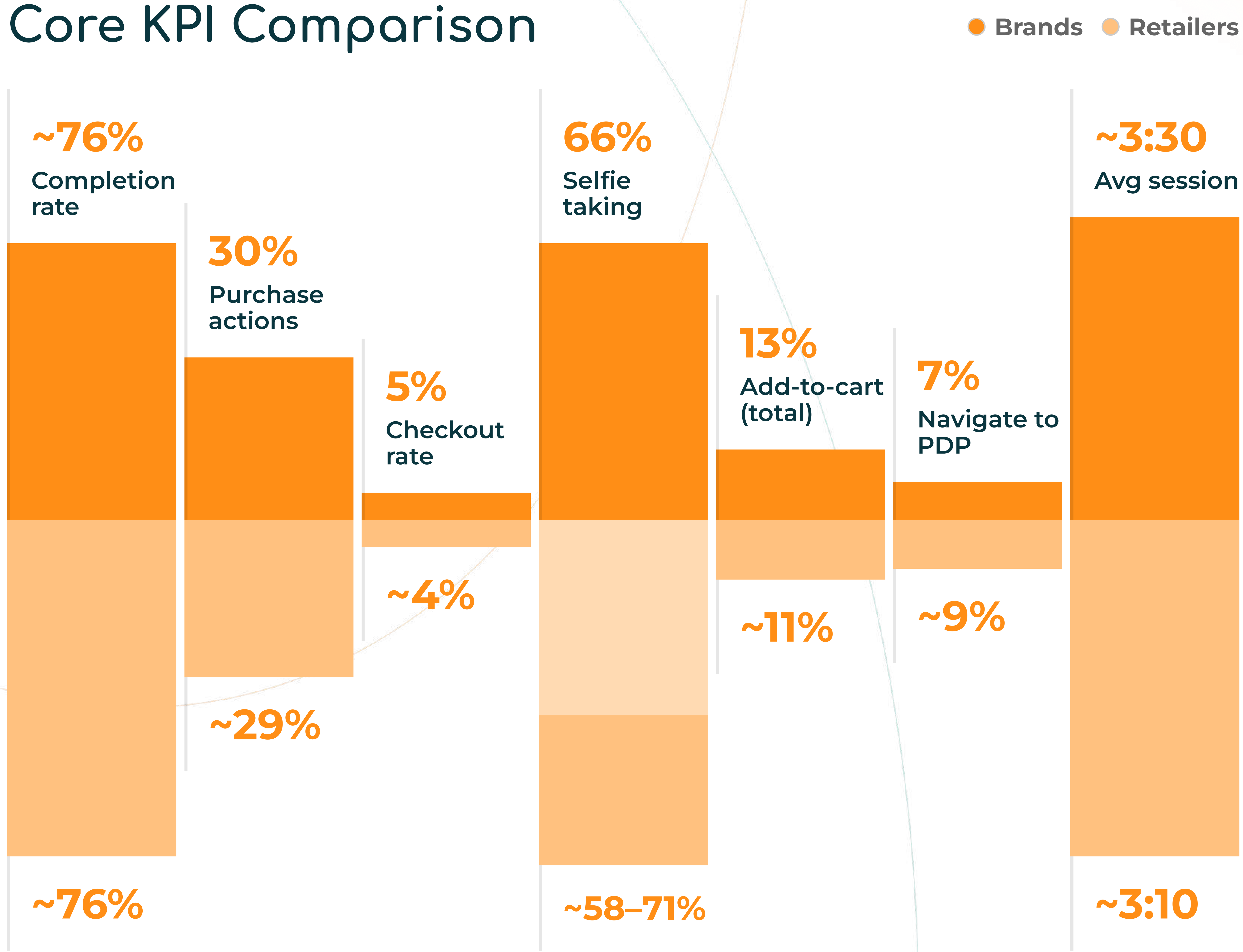
Insight:

Nearly one in four users still does not know their skin type — validating diagnostics as a critical education layer, not just a conversion tool.

02

Skincare Performance: Brands vs Retailers

Core KPI Comparison



Interpretation:

Brands convert slightly more efficiently, while retailers excel at exploration and discovery. Both rely heavily on guided diagnostics to drive performance.

Behavioral Differences by Channel

Why it matters:

This divergence shows why **conversion rate alone no longer captures true beauty performance** — discovery depth and intent quality matter just as much.

03

Makeup Index 2025: Try-On, Taste & Intent

Makeup journeys are exploration-first by design, with PDP viewing acting as the primary success signal.

User Preferences & Look Behavior

Coverage preference
~45% Radiant
~22% Matte

Look preference
~47% Natural
Glam / evening: smaller shares

Feature emphasis
~45% Complexion
~35% Lips
~20% Eyes

Skin tone
~12% Dark / Deep together
Light / Fair / Medium dominate

Top Try-On Categories

1 Lipstick ★	4 Concealer ★
2 Foundation ★	5 Blush ★
3 Lip gloss ★	

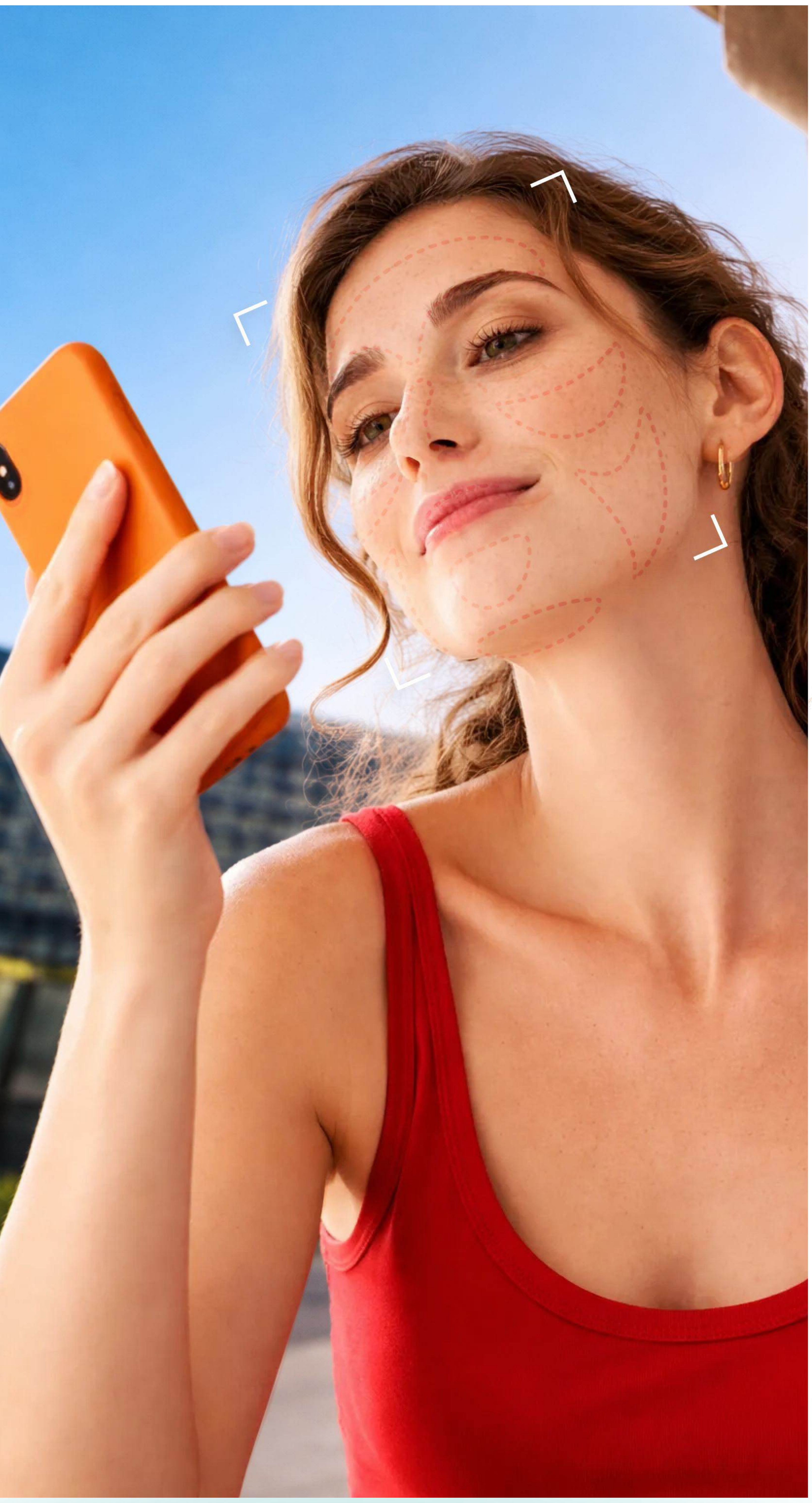
Top Categories Added to Cart After Try-On

1 Foundation ★	4 Blush ★
2 Lipstick ★	5 Eyeshadow ★
3 Concealer ★	

Photo-based try-on dominates, indicating **low-friction experimentation** as the preferred user behavior.

04

Strategic Takeaways for 2025



What Works Across Beauty & Wellness

- Guided diagnostics (selfie & quiz)
- Mobile-first UX
- Concern-led personalization
- Routine-based logic (even for brands)

Where Brands Should Focus

- Optimize hero SKUs
- Reduce friction at checkout
- Leverage diagnostics to shorten decision cycles

Where Retailers Should Focus

- Support exploration and comparison
- Promote routines and bundles
- Delay hard sell until intent is qualified

05

Bonus Section: Holiday Season Performance 2025

Holiday Insight (Oct–Dec 2025 vs Oct–Dec 2024)

Holiday 2025 wasn't about speed — it was about confidence.

Despite traffic surges and promotional pressure, AI-powered diagnostics proved essential infrastructure for peak-season performance.

Key signals:

1.6–1.9×

Guided users converted at **1.6–1.9× higher** rates and delivered higher **AOV**

~74%

Completion rates remained stable at **~74%**, even under peak load

~9%

Selfie-based interactions grew **~9% YoY**

Brands

Diagnostics helped consumers during **heavy discounting periods**:

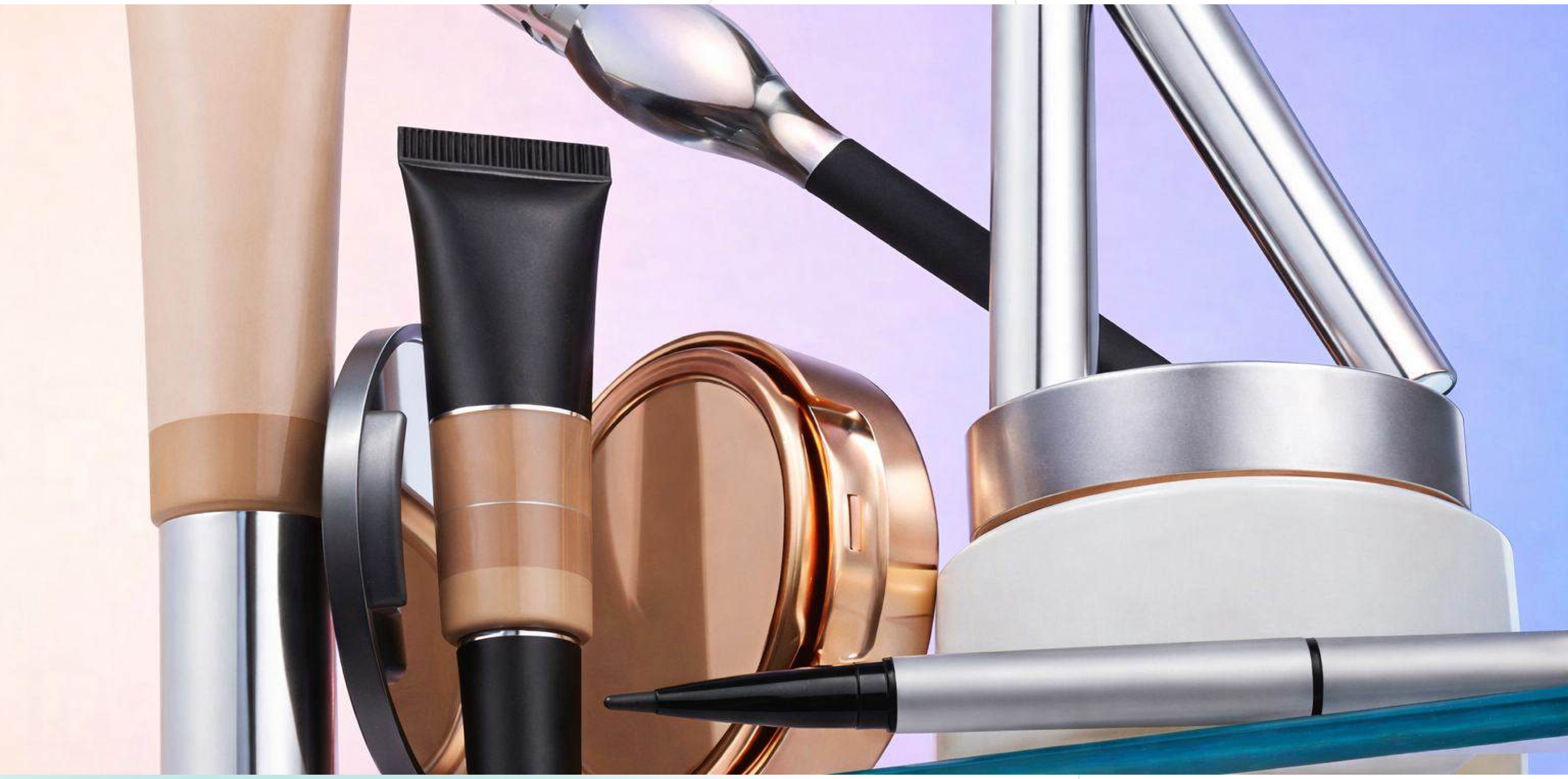
Validate decisions **supporting premium positioning** **higher-quality conversion**

50-70%

HIGHER ENGAGEMENT

Retailers

Guided journeys **absorbed 50–70% higher engagement volumes** without degrading funnel efficiency — structuring browsing-heavy traffic during Black Friday and Cyber Monday.



CONCLUSION

In 2025, beauty conversion is no longer linear.

Guided journeys are the strongest performance driver across the entire funnel.

Brands
win on efficiency

Retailers
win on exploration

Brands/Retailers
win when diagnostics lead the journey.

Guided experiences are no longer a differentiator — they are the **foundation of modern beauty commerce.**