

IPSY BEAUTY DISCOVERY REPORT 2025

IPSY's passion for beauty goes beyond business, it's in our DNA. We are proud to serve a vibrant community of 20+ million beauty enthusiasts who are constantly exploring, experimenting, and evolving. We created the *IPSY Beauty Discovery Report* to share exclusive insights into the trends, behaviors, and category shifts defining beauty today—and setting the stage for what's next.

This report is more than data. It's a celebration of a consumer-driven industry in motion and a look at what makes IPSY the leader in beauty discovery. Our subscription model doesn't just deliver products. It delivers experiences, inspiration, and the confidence to explore your most authentic self.

2025 BEAUTY TRENDS

Our data uncovers what's next—before it hits your feed. These five trends reflect how 20+ million beauty lovers are discovering, shopping, and shaping the industry in real time.



1. MUA ALL DAY

The MUA Movement Outshines Celeb Hype

Consumers are craving credibility, and data shows that makeup artist-founded brands are outperforming celebrity lines thanks to their artistry-first approach and innovative formulas.

- ★ MUA-founded brands dominate three out of the top five most in-demand beauty brands, surpassing celebrity brands among both Gen Z and Millennials.
- ★ This year's Ipsies: Beauty Awards recognized six makeup artist-founded brands.

Gen Z and Millennials
Can't Stop Buying:

ANASTASIA
BEVERLY HILLS

DANESSA MYRICKS BEAUTY

FORMULA 

2. GLOSS LOVERS

Gen Z Shifts Focus From Scents to Gloss

Millennials jumped on the fragrance bandwagon—but Gen Z has already moved on, with lip products now taking center stage in their makeup routines.

- ★ For Gen Z, lip products have replaced fragrance as their #3 priority, indicating the next hot growth category will be lip.
- ★ In the lip category, lip gloss has demonstrated superior performance overall.
- ★ Fragrance ranks as the #3 priority for Millennials when sampling products.
- ★ The top five most popular product categories purchased by Gen Z are moisturizer, serum, lipstick, brows, and cleanser.



FENTY BEAUTY
Gloss Bomb Universal Lip
Luminizer in Diamond Milk



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3. **TO THE MAX**

**The Maximalist Aesthetic
Unites Beauty & Design**

Established art and design capitals are now the driving force behind makeup's maximalist revolution. As cities with thriving creative scenes continue to apply a 'more is more' aesthetic, maximalist-themed palettes are now taking over vanities in major metro areas across the country.



- ★ **Chicago** - Home to the influential Art Institute and thriving design district
- ★ **Miami** - Transformed by Art Basel and the Design District's creative energy
- ★ **San Antonio** - Emerging as a southwestern art hub with vibrant public installations
- ★ **Los Angeles** - Where entertainment industry aesthetics meet contemporary art
- ★ **Houston** - Boasting museum districts and growing design influence
- ★ **Las Vegas** - Reinventing itself with dramatic artistic installations and performances
- ★ **Brooklyn** - Long established as an incubator for avant-garde artistic expression
- ★ **Phoenix** - Known for a distinctive desert-inspired art and design aesthetic

4. **VERY BERRY**

**The Ultimate Back-to-School
Trend Is a Berry Lip**

Berry-toned lipsticks saw a massive surge during the back-to-school season in 2023 and 2024, illuminating that Gen Z is prepping their campus makeup routine with a signature lip.

- ★ In August 2024, berry-toned orders spiked to **422%**.
- ★ 2025 is already seeing a **50% year-over-year** increase in berry shade interest.

IPSY Member's Top Berry Picks:

- ★ **BENEFIT COSMETICS** Plush Tint in Purrr
- ★ **THE BEAUTY CROP** Lipped Cream Lip Kit in Date Night
- ★ **REALHER** Mini Lipstick in Celebrate Diversity
- ★ **ANASTASIA BEVERLY HILLS** Matte Lipstick in Rum Punch
- ★ **TYS BEAUTY** Cheek Treat Liquid Blush in Splash



ANASTASIA BEVERLY HILLS
Matte Lipstick in Rum Punch



5. SUPER SERUM

The Hottest Product for Skin Right Now Is Serum

Serums have been replacing foundation's popularity, capturing a shift in how consumers approach products for their skin.



BYROE
Hydrangea Tea Intensive Hydration Serum



TATCHA
The Water Cream

- ★ **89%** of last year's IPSY subscriptions included serums and moisturizers.
- ★ That number is up by almost **9% year-over-year**.
- ★ Moisturizer was the most-purchased category.
- ★ Foundation did not make it to the top 5 for Gen Z or Millennials.
- ★ **TATCHA The Water Cream** was the most-purchased product.

Our Methodology

The *IPSY Beauty Discovery Report* analyzes real IPSY consumer behavior, drawing on more than 200 million product reviews and extensive member data from across North America. This includes product selections, feedback, and purchasing patterns from the past 12 months. As part of the report, our annual Ipsies: Beauty Awards highlights the brands and products that made the biggest impact on our community—based entirely on reviews and popularity.



Beauty's Best-Kept Secret Is in Your Mailbox

From first swipe to full-size, IPSY fuels beauty discovery with a sample-to-purchase path that keeps members coming back every month.

- ★ **78%** of IPSY members say it is the top way they discover beauty products.
- ★ **50%** incorporate new discoveries into their routines monthly.
- ★ **88%** join IPSY specifically to discover new brands and products.
- ★ IPSY members test an average of **30 unique brands annually**.
- ★ **73%** have purchased or plan to purchase products after sampling them.

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