5W | 5W Public Relations
Research · 2026

5W PUBLIC RELATIONS · 2026 RESEARCH

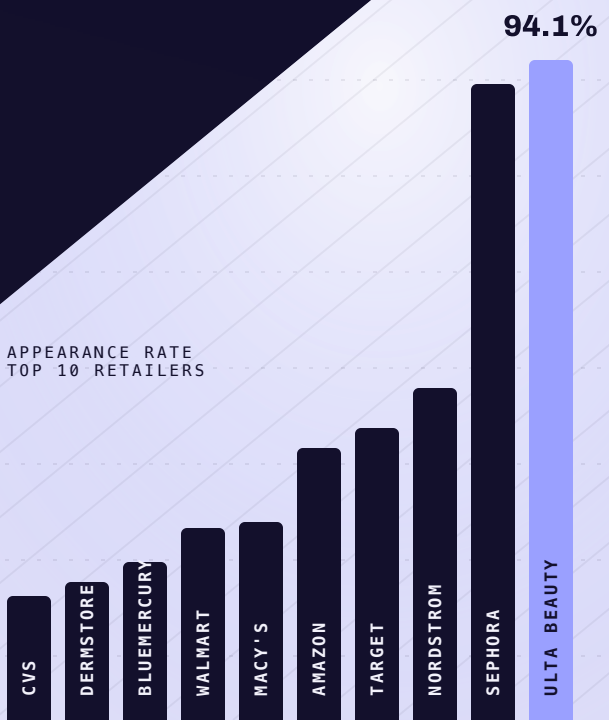
BEAUTY RETAILERS INDEX 2.0

Which beauty retailers AI engines name
288 AI answers · October 30, 2026

Measured :
October 30, 2026
24 questions × 3 runs · 288 AI answers

Engines :
ChatGPT · Claude · Gemini · Perplexity
plus 41 Google AI Overviews

Prepared by :
5W Public Relations
5wpr.com



AT A GLANCE

Ulta Beauty and Sephora lead. Too close to separate.

Ulta Beauty: 271/288 (94.1%; 95% interval 90.8–96.3%). Sephora: 261/288 (90.6%; 95% interval 86.7–93.5%). Their 95% intervals overlap; neither can be called the sole leader.

Version 2. This version replaces the first version of this study, first published May 30, 2026. It uses measured counts, so the two versions are not comparable.

288
AI answers analyzed across ChatGPT, Claude, Gemini and Perplexity

94.1%
of answers named Ulta Beauty, the most-named (271 of 288)

23
tracked retailers named at least once (of 24)

66.1%
of Google searches showed an AI Overview (41 of 62)

INSIDE THIS REPORT

01 Key findings 03
02 The leaderboard 04
03 Profiles 06
04 How the engines differ 07
05 Google AI Overviews 08
06 Leaders by question 09
07 Who the engines cite 10
08 Improving AI visibility 12
09 Questions people ask 13
10 Methodology 14
A Appendix: the 24 questions 15

KEY FINDINGS

01 What the data shows

MOST NAMED

271/288 (94.1%)

Ulta Beauty appeared in 271 of 288 four-engine answers (CI 90.8–96.3%). Sephora appeared in 261 of 288 (90.6%, CI 86.7–93.5%). The intervals overlap, so the two cannot be separated.

NAMED FIRST

110/288 (38.2%)

Sephora was the first retailer named in 110 of 288 answers, more than any other tracked retailer. Its average first position was 2. Ulta Beauty was named first in 108 of 288.

CHATGPT SKEW

43/72 (59.7%)

ChatGPT named Amazon in 43 of 72 answers. The other engines named it in 22 to 25 of 72.

CHATGPT SKEW

32/72 (44.4%)

ChatGPT named Walmart in 32 of 72 answers. The other engines named it in 13 to 18 of 72.

OWN-SITE CITATIONS

85/288 (29.5%)

Ulta Beauty's own domains were cited in 85 of 288 grounded answers, more than any other tracked retailer. Sephora followed at 78 of 288. 4 of 24 tracked retailers had 0 of 288.

AIO TRIGGER

41/62 (66.1%)

Google AI Overviews appeared on 41 of 62 searches (CI 53.7–76.7%). On the other 21, no overview was shown.

AIO LEADER

35/41 (85.4%)

Ulta Beauty was the retailer named most often in AI Overviews, at 35 of 41, followed by Sephora at 32 of 41 (78%). In the four-engine set, Ulta Beauty was named in 271 of 288 answers (94.1%).

TOP DOMAIN

61/288 (21.2%)

topconsumerreviews.com was cited in 61 of 288 grounded four-engine answers, with 148 of 2,347 citations (6.3%). ulta.com came second with 116 citations in 85 answers (29.5%).

02 THE LEADERBOARD

Which retailers AI engines name

Appearance rate across 288 four-engine answers. The bar is the 95% confidence interval; overlapping bars cannot be told apart at this sample size.

	BRAND	RATE	NAMED IN
1	Ulta Beauty	94.1%	271/288
2	Sephora	90.6%	261/288
3	Nordstrom	47.2%	136/288
4	Target	41.7%	120/288
5	Amazon	38.9%	112/288
6	Macy's	28.1%	81/288
7	Walmart	27.4%	79/288
8	Bluemercury	22.6%	65/288
9	Dermstore	19.8%	57/288
10	CVS	17.7%	51/288
11	Sally Beauty	15.3%	44/288
12	Walgreens	12.8%	37/288
13	Credo Beauty	12.2%	35/288
14	Saks Fifth Avenue	10.8%	31/288
15	FragranceNet	7.6%	22/288

02 THE LEADERBOARD

The full list

Own-domain citation is the share of 288 grounded answers that cited the tracked name's own domains (subdomains included). Citation share is of all 2,347 citations.

#	RETAILER	NAMED IN	APPEARANCE RATE	95% INTERVAL	FIRST MENTION	OWN-DOMAIN CITATION	CITATION SHARE
1	Ulta Beauty	271/288	94.1%	90.8–96.3%	2.1	29.5% (85/288)	4.9%
2	Sephora	261/288	90.6%	86.7–93.5%	2	27.1% (78/288)	4%
3	Nordstrom	136/288	47.2%	41.5–53%	3.7	11.5% (33/288)	1.8%
4	Target	120/288	41.7%	36.1–47.4%	4	9.7% (28/288)	2%
5	Amazon	112/288	38.9%	33.4–44.6%	4.7	1% (3/288)	0.1%
6	Macy's	81/288	28.1%	23.2–33.6%	5.5	5.9% (17/288)	0.7%
7	Walmart	79/288	27.4%	22.6–32.9%	4.3	3.8% (11/288)	0.5%
8	Bluemercury	65/288	22.6%	18.1–27.7%	4.5	3.5% (10/288)	0.4%
9	Dermstore	57/288	19.8%	15.6–24.8%	4.5	4.5% (13/288)	0.7%
10	CVS	51/288	17.7%	13.7–22.5%	4.9	4.2% (12/288)	0.5%
11	Sally Beauty	44/288	15.3%	11.6–19.9%	3.6	5.9% (17/288)	0.8%
12	Walgreens	37/288	12.8%	9.5–17.2%	6	1.7% (5/288)	0.2%
13	Credo Beauty	35/288	12.2%	8.9–16.4%	3.9	2.8% (8/288)	0.3%
14	Saks Fifth Avenue	31/288	10.8%	7.7–14.9%	4.6	0.3% (1/288)	0%
15	FragranceNet	22/288	7.6%	5.1–11.3%	3.8	2.1% (6/288)	0.3%
16	Neiman Marcus	20/288	6.9%	4.5–10.5%	4	2.4% (7/288)	0.3%
17	Bloomingdale's	17/288	5.9%	3.7–9.2%	5.8	2.1% (6/288)	0.3%
18	Kohl's	14/288	4.9%	2.9–8%	3.5	0.3% (1/288)	0%
19	Soko Glam	14/288	4.9%	2.9–8%	3.4	1.4% (4/288)	0.2%
20	Space NK	14/288	4.9%	2.9–8%	5.1	0% (0/288)	0%
21	YesStyle	14/288	4.9%	2.9–8%	4.5	1% (3/288)	0.1%
22	Olive Young	9/288	3.1%	1.7–5.8%	2.9	0% (0/288)	0%
23	SkinStore	2/288	0.7%	0.2–2.5%	5	0% (0/288)	0%
24	Revolve Beauty	0/288	0%	0–1.3%	–	0% (0/288)	0%

PROFILES

03 The top eight, side by side



RANK 1

Ulta Beauty

271/288 answers · 95% CI 90.8–96.3%

2.1	29.5%	4.9%
first-mention position	owned-domain citation (85/288)	citation share

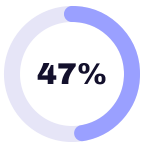


RANK 2

Sephora

261/288 answers · 95% CI 86.7–93.5%

2	27.1%	4%
first-mention position	owned-domain citation (78/288)	citation share

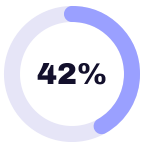


RANK 3

Nordstrom

136/288 answers · 95% CI 41.5–53%

3.7	11.5%	1.8%
first-mention position	owned-domain citation (33/288)	citation share



RANK 4

Target

120/288 answers · 95% CI 36.1–47.4%

4	9.7%	2%
first-mention position	owned-domain citation (28/288)	citation share



RANK 5

Amazon

112/288 answers · 95% CI 33.4–44.6%

4.7	1%	0.1%
first-mention position	owned-domain citation (3/288)	citation share



RANK 6

Macy's

81/288 answers · 95% CI 23.2–33.6%

5.5	5.9%	0.7%
first-mention position	owned-domain citation (17/288)	citation share

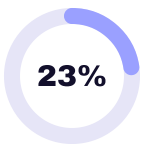


RANK 7

Walmart

79/288 answers · 95% CI 22.6–32.9%

4.3	3.8%	0.5%
first-mention position	owned-domain citation (11/288)	citation share



RANK 8

Bluemercury

65/288 answers · 95% CI 18.1–27.7%

4.5	3.5%	0.4%
first-mention position	owned-domain citation (10/288)	citation share

04

HOW THE ENGINES DIFFER

Same questions, different answers

ChatGPT named Amazon in 43 of 72 answers. The other engines named it in 22 to 25 of 72. ChatGPT named Walmart in 32 of 72 answers. The other engines named it in 13 to 18 of 72.

ChatGPT

72 ASKED | 72 RETURNED | 72 GROUNDED

Ulta Beauty	**91.7%**
Sephora	**90.3%**
Amazon	**59.7%**
Target	**48.6%**
Walmart	**44.4%**
Nordstrom	**36.1%**

Claude

72 ASKED | 72 RETURNED | 72 GROUNDED

Ulta Beauty	**98.6%**
Sephora	**90.3%**
Nordstrom	**50%**
Amazon	**34.7%**
Target	**30.6%**
Bluemercury	**27.8%**

Gemini

72 ASKED | 72 RETURNED | 72 GROUNDED

Ulta Beauty	**97.2%**
Sephora	**93.1%**
Nordstrom	**54.2%**
Target	**47.2%**
Macy's	**34.7%**
Amazon	**30.6%**

Perplexity

72 ASKED | 72 RETURNED | 72 GROUNDED

Ulta Beauty	**88.9%**
Sephora	**88.9%**
Nordstrom	**48.6%**
Target	**40.3%**
Macy's	**31.9%**
Amazon	**30.6%**

GOOGLE AI OVERVIEWS

05 The fifth engine

Google AI Overviews were captured through 62 U.S. desktop searches and scored only where an overview appeared, so five-engine figures use 288 + 41 = 329 answers.



TRIGGER RATE

Google AI Overviews appeared on 41 of 62 searches (66.1%, CI 53.7–76.7%). The other 21 searches showed no overview. Within the 41 overviews, Ulta Beauty was named in 35 (85.4%), Sephora was named in 32 (78%), Nordstrom was named in 19 (46.3%), Target was named in 13 (31.7%). youtube.com was the most-cited source, with 16 citations and an appearance in 16 of 41 overviews.

FIVE-ENGINE RANK (FOUR-ENGINE RANK IN ARROWS)

1	Ulta Beauty	93.0%	=
2	Sephora	89.1%	=
3	Nordstrom	47.1%	=
4	Target	40.4%	=
5	Amazon	37.1%	=
6	Macy's	27.7%	=
7	Walmart	27.7%	=
8	Bluemercury	21.6%	=
9	Dermstore	19.1%	=
10	CVS	17.3%	=

06

LEADERS BY QUESTION

Who each question surfaces first

Six questions from the set. Each tile uses that question's own four-engine answers as the denominator.

Q01 · 12 ANSWERS

Sephora 100%

TIED WITH ULTA BEAUTY, NORDSTROM

Ulta Beauty	100%
Nordstrom	100%

AI Overview shown on 1 of 3 searches

Q02 · 12 ANSWERS

Sephora 100%

TIED WITH ULTA BEAUTY

Ulta Beauty	100%

AI Overview shown on 3 of 3 searches

Q03 · 12 ANSWERS

Sephora 100%

TIED WITH ULTA BEAUTY, TARGET

Ulta Beauty	100%
Target	100%

AI Overview shown on 2 of 3 searches

Q04 · 12 ANSWERS

Ulta Beauty 100%

TIED WITH SEPHORA

Sephora	100%
Nordstrom	8.3%

AI Overview shown on 2 of 2 searches

Q05 · 12 ANSWERS

Sephora 100%

TIED WITH DERMSTORE, ULTA BEAUTY

Dermstore	100%
Ulta Beauty	100%

AI Overview shown on 1 of 2 searches

Q06 · 12 ANSWERS

Ulta Beauty 100%

Target	83.3%
Walmart	66.7%

AI Overview shown on 3 of 3 searches

07

WHO THE ENGINES CITE

Most-cited domains

The four engines produced 2,347 citations in total. topconsumerreviews.com was cited most often, with 148 citations (6.3%) across 61 answers. Next came ulta.com (116), sephora.com (85), rakuten.com (47), reddit.com (42), target.com (40).

FOUR AI ENGINES · SHARE OF 288 GROUNDED ANSWERS

ulta.com	**29.5%**
sephora.com	**24.7%**
topconsumerreviews....	**21.2%**
rakuten.com	**14.2%**
reddit.com	**12.8%**
beautymatter.com	**12.2%**
nordstrom.com	**10.4%**
kajabeauty.com	**8%**
target.com	**7.6%**
en.wikipedia.org	**7.6%**

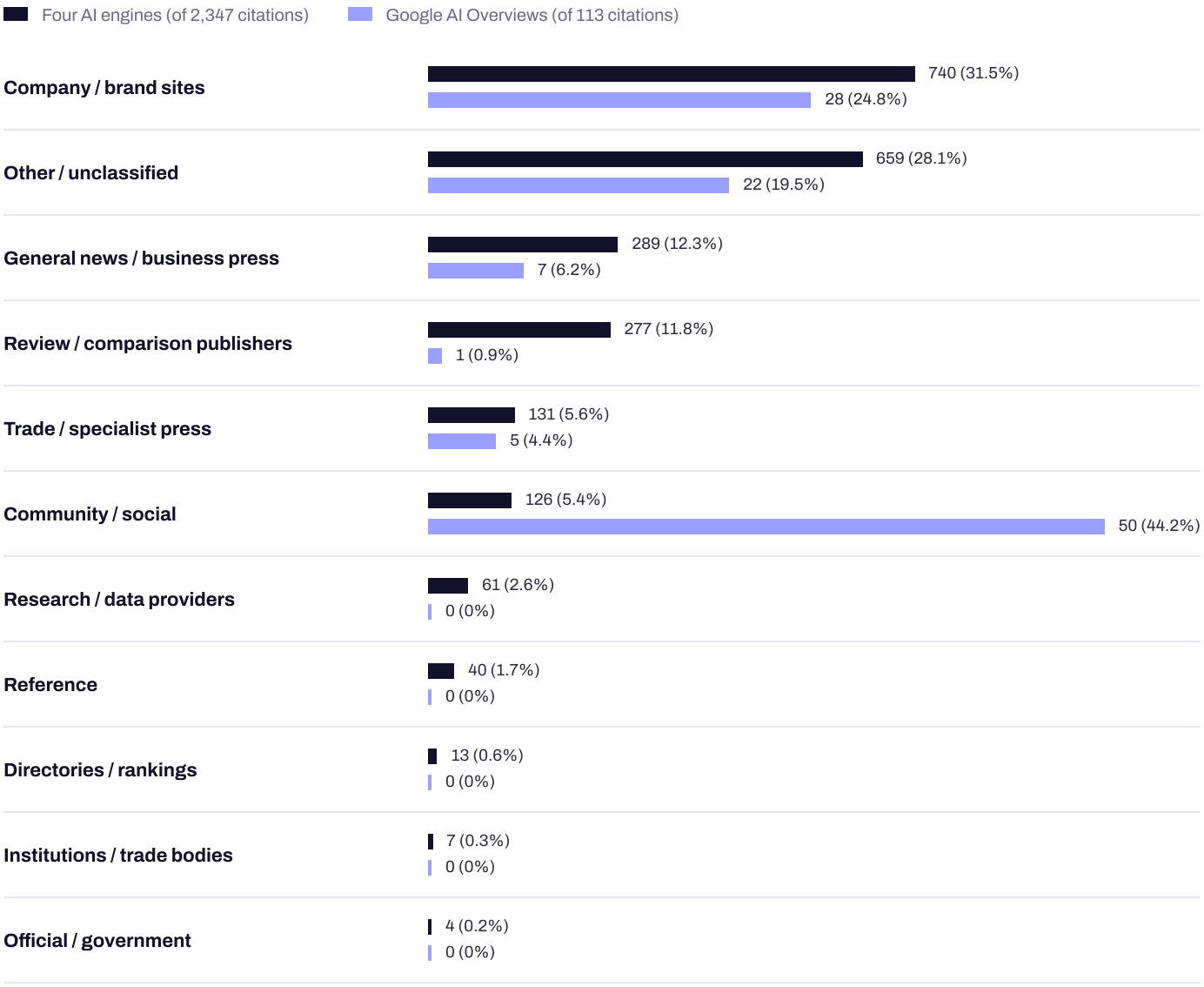
GOOGLE AI OVERVIEWS · SHARE OF 41 OVERVIEWS

youtube.com	**39%**
reddit.com	**29.3%**
sephora.com	**14.6%**
tiktok.com	**12.2%**
ulta.com	**12.2%**
instagram.com	**9.8%**
nordstrom.com	**7.3%**
askattest.com	**4.9%**
beautypackaging.com	**4.9%**
fox5sandiego.com	**4.9%**

07 WHO THE ENGINES CITE

Citation share by source type

Share of all citations by the type of site cited.



08

WHAT THE DATA SUGGESTS

How can retailers improve their AI visibility?

These steps follow from the measured results above. They describe what the engines cited in this study and are not a guarantee of results.

STEP	WHAT THIS STUDY MEASURED
Put your facts on your own domain.	Ulta Beauty's own domains were cited in 29.5% of grounded answers, Sephora's in 27.1% and Nordstrom's in 11.5%.
Keep your facts accurate on the sites engines cite.	The most-cited sites other than the tracked names' own were topconsumerreviews.com (in 21.2% of grounded answers), rakuten.com (14.2%), reddit.com (12.8%), beautymatter.com (12.2%) and kajabeauty.com (8.0%). General news and business press supplied 12.3% of citations and review and comparison publishers 11.8%.
Check each engine separately.	ChatGPT named Amazon in 59.7% of answers against 30.6% on Gemini. ChatGPT named Walmart in 44.4% of answers against 18.1% on Perplexity.
Watch names outside the tracked list.	Clinique (14 answers), Tatcha (11 answers), The Detox Market (10 answers), CosmoProf (10 answers), SalonCentric (9 answers) were named often but were not tracked.
Re-run the same questions every month.	Compare counts and intervals, not ranks. The 24 questions are in the appendix.

QUESTIONS PEOPLE ASK

09 What AI answers

Q1 Which retailer do AI engines name most often?

Ulta Beauty, named in 271 of 288 four-engine answers (94.1%, CI 90.8–96.3%). Sephora was second at 261 of 288 (90.6%). The intervals overlap, so the two cannot be separated statistically.

Q2 Which retailer is named first most often?

Sephora was the first retailer named in 110 of 288 answers, with an average first position of 2.

Q3 How often do Google AI Overviews appear for these questions?

An overview appeared on 41 of 62 searches (66.1%, CI 53.7–76.7%). Within those 41 overviews, Ulta Beauty was named most often, in 35 (85.4%).

Q4 Which sources do the engines cite?

Across 2,347 four-engine citations, topconsumerreviews.com was cited most (148 citations, in 61 of 288 grounded answers), followed by ulta.com (116 citations).

Q5 Do the four engines agree?

Only in part. ChatGPT named Amazon in 43 of 72 answers, against 22 to 25 of 72 on the other engines. ChatGPT named Walmart in 32 of 72 answers, against 13 to 18 of 72 on the other engines.

METHODOLOGY

10 How this study was measured

24	×	3	×	4	=	288	+	62
questions		runs each		AI engines		answers		Google searches · 41 AI Overviews

24 questions asked three times on each of ChatGPT, Claude, Gemini and Perplexity, measured October 30, 2026. United States, English; Google retrieval uses desktop results. Models: gpt-5-mini, claude-sonnet-5-5, gemini-3.6-flash only, sonar-pro. Google AI Overviews come from DataForSEO, not inferred chat answers. Appearance counts returned text, including ungrounded answers; citation rates use grounded answers. Longer overlapping names suppress shorter ones; First mention is the earliest eligible name order. Own-domain rates include declared domains and subdomains; shared parent scopes may count for multiple names and cannot be summed as unique citations.

ENGINE	MODEL IDS CALLED	ASKED	RETURNED	GROUNDED
ChatGPT	gpt-5-mini	72	72	72
Claude	claude-sonnet-5-5	72	72	72
Gemini	gemini-3.6-flash	72	72	72
Perplexity	sonar-pro	72	72	72
Google AI Overviews	DataForSEO Google SERP (live, advanced)	62	41 shown	41

Own-domain citations count a domain plus all its subdomains, with the same rule in every table.

METRIC DEFINITIONS

- Appearance rate: answers naming the tracked name ÷ answers returned, with Wilson 95% intervals.
- First mention: average order in which the tracked name first appears (1 = first).
- Own-domain citation: grounded answers citing the tracked name's domains ÷ grounded answers.
- Citation share: citations to the tracked name's domains ÷ all citations.

LIMITATIONS

- Only 24 tracked retailers are ranked; results are not an exhaustive market ranking.
- Only the tracked retailers were scored. Untracked names that appeared often were not scored, including Clinique (14 answers), Tatcha (11 answers), The Detox Market (10 answers), CosmoProf (10 answers), SalonCentric (9 answers).
- 350 of 360 planned results were returned. 10 AI Overview lookups were excluded after at most three total attempts.
- 62 successful Google searches: 41 overviews shown; 21 without an overview. Failures are excluded, not scored as zero.
- All returned chat answers had search sources.
- Removing 1 Core question naming tracked subjects leaves 276 eligible answers. The top two are Ulta Beauty (259/276) and Sephora (249/276); their order does not change.
- Unverified own domains are not available, never zero or guessed. Source types use Company / brand sites only for verified official organisations; other unresolved sites are Other / unclassified.
- Wilson 95% intervals are descriptive; overlapping leading intervals do not establish a sole leader. Measurements do not endorse medical, legal, financial or product claims.
- Focus pair Sephora and Ulta Beauty with 22 other US beauty retailers. Questions test the earlier income and age split directly (budget versus luxury, teen and Gen Z versus shoppers over 40) without naming either retailer. One Core question names both focus retailers and is flagged.
- Answers came from each engine's API (model IDs above); the consumer apps can answer differently.
- Google Shopping links and Google redirect URLs are not counted as cited sources; original URLs remain in the evidence.

A

APPENDIX

The 24 questions

Questions marked "Core question" are the original study questions, asked word for word. The others are added neutral questions.

#	QUESTION	GROUP	SOURCE
01	Where is the best place to buy prestige makeup in the US?	Beauty Retailers Index 2.0	CORE QUESTION
02	Sephora vs Ulta: which is better for skincare?	Beauty Retailers Index 2.0	CORE QUESTION
03	Where do teens shop for makeup?	Beauty Retailers Index 2.0	CORE QUESTION
04	Which beauty retailer has the best loyalty program?	Beauty Retailers Index 2.0	CORE QUESTION
05	What is the best online store for skincare?	Beauty Retailers Index 2.0	CORE QUESTION
06	Where can I buy both drugstore and high-end beauty products in one place?	Beauty Retailers Index 2.0	CORE QUESTION
07	Which beauty retailer has the best return policy?	Beauty Retailers Index 2.0	CORE QUESTION
08	Where is the best place to buy fragrance?	Beauty Retailers Index 2.0	CORE QUESTION
09	Where should I buy hair care products and styling tools?	Beauty Retailers Index 2.0	CORE QUESTION
10	Which beauty retailers are best for luxury makeup brands?	Beauty Retailers Index 2.0	ADDED QUESTION
11	Which beauty retailers are best for budget makeup?	Beauty Retailers Index 2.0	ADDED QUESTION
12	Where do Gen Z shoppers buy beauty products?	Beauty Retailers Index 2.0	ADDED QUESTION
13	Where do shoppers over 40 buy skincare?	Beauty Retailers Index 2.0	ADDED QUESTION
14	Which stores sell the widest range of beauty brands?	Beauty Retailers Index 2.0	ADDED QUESTION
15	What are the best beauty retailers in the US?	Beauty Retailers Index 2.0	ADDED QUESTION
16	Where is the best place to buy Korean skincare in the US?	Beauty Retailers Index 2.0	ADDED QUESTION
17	Where can I buy clean beauty products?	Beauty Retailers Index 2.0	ADDED QUESTION
18	Which beauty retailers offer free samples?	Beauty Retailers Index 2.0	ADDED QUESTION
19	Where is the best place to buy makeup online?	Beauty Retailers Index 2.0	ADDED QUESTION
20	Which beauty stores offer in-store services such as brow or hair appointments?	Beauty Retailers Index 2.0	ADDED QUESTION
21	Where can I buy affordable fragrance?	Beauty Retailers Index 2.0	ADDED QUESTION
22	Which retailers sell professional hair care brands?	Beauty Retailers Index 2.0	ADDED QUESTION
23	Which beauty retailers have the best sales events?	Beauty Retailers Index 2.0	ADDED QUESTION
24	Which beauty retailers offer same-day delivery?	Beauty Retailers Index 2.0	ADDED QUESTION

5W

5W PUBLIC RELATIONS · RESEARCH

Beauty Retailers Index 2.0

Measured October 30, 2026 · 5W Public Relations

WEB
5wpr.com

RESEARCH
5wpr.com/research