

# Beauty's center of gravity moved to *1,000-creator seeding operations*. The brands scaling that motion are eating the shelf.

Six shifts, three case studies, an interactive readiness assessment, and a seven-step 90-day plan — for founders, CMOs, and brand leaders of skincare, haircare, cosmetics, and fragrance brands building creator operations at the scale that now defines the category.

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READ 14 MIN

BY 5W BEAUTY & WELLNESS PRACTICE

30,000+

BEAUTY BRANDS ACTIVE ON TIKTOK SHOP GLOBALLY — PATTERN / BEAUTYMATTER

22.5%

BEAUTY'S SHARE OF TIKTOK SHOP GLOBAL GMV

+94%

50%

## EXECUTIVE SUMMARY

**B**eauty has become the most competitive creator content category in America. 30,000-plus beauty brands now operate on TikTok Shop — up from near zero two years ago — and the category accounts for roughly 22.5% of TikTok Shop's global GMV. The brands gaining share in this environment share an operating model: 1,000-plus creators seeded per quarter, a dedicated dermfluencer and skinfluencer relationship program, a compliance operating system that survives FDA scrutiny at scale, and a retail buyer conversation that leads with creator velocity data rather than with a founder story.

This playbook is built for the beauty leader who has seen the pattern work for competitors, recognizes their current creator program is underscaled for the category's 2026 competitive density, and needs a realistic 90-day plan to move from occasional influencer campaigns to a compounding creator operation that produces Sephora, Ulta, and Amazon outcomes.

## § 01 / TRENDS

# Six shifts reshaping *beauty* growth in 2026.

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# 01

## The competitive density in beauty moved creator seeding scale from 100 to 1,000.

With 30,000-plus beauty brands active on TikTok Shop and beauty running at 22.5% of global TTS GMV, a 100-creator-per-quarter seeding program is no longer visible in category feeds. The brands winning at scale — Rhode, Merit, CeraVe's TikTok Shop revival (which saw **55.5% GMV growth year-to-date**) — seed at 1,000-plus creators per quarter.

The reason is algorithmic and human: **volume of authentic use** is what both the TikTok recommendation engine and the beauty consumer respond to. Ten thousand small creator moments build category trust that ten celebrity spots cannot replicate.

### WHAT TO DO NOW

Audit your current quarterly creator count. If it is below 500, you are structurally underscaled for 2026 beauty competition.

# 02

## The dermfluencer and skinfluencer economy is beauty's credibility infrastructure.

Dermatologists and skincare experts — Dr. Shereene Idriss, Dr. Muneeb Shah, Hiram, James Welsh, Dr. Dray, and dozens of others with 500K to 10M followers — now function as **credibility gatekeepers** for skincare and haircare launches. A product teardown or

recommendation from this group drives consumer purchase and retail buyer confidence simultaneously.

The dermfluencer relationship economy is a 12-to-18-month build, not a quarterly campaign. Beauty brands that treat it as a transactional influencer layer — same brief, same disclosure, same fee — consistently underperform brands that treat it as a long-term relationship investment with expert partners who have their own reputation to protect.

#### WHAT TO DO NOW

Identify your 30 to 50 dermfluencer or skinfluencer targets today. Start the relationship, not the transaction.

# 03

## Sephora and Ulta buyers lead with data, not narratives.

Category buyers at Sephora, Ulta, and Credo have restructured how they evaluate brands for shelf placement. Before the trade meeting, they pull **TikTok Shop GMV trend, hashtag volume, dermfluencer endorsement log, Amazon review count and trajectory**, and creator-to-purchase conversion data. A brand with documented velocity data is a different meeting than a brand with a product lineup and an origin story.

The effective 2026 retail pitch leads with numbers, not narrative. The story matters — but it matters after the velocity conversation, not before it.

### WHAT TO DO NOW

Build your one-page monthly velocity report for Sephora and Ulta buyers. Lead with GMV, dermfluencer endorsements, Amazon reviews, then narrative.

# 04

## Celebrity beauty and founder-led beauty need inverted creator strategies.

Celebrity beauty brands — Rhode (Hailey Bieber), Rare Beauty (Selena Gomez), r.e.m. beauty (Ariana Grande) — have built-in awareness and a trust deficit. The winning creator strategy over-indexes on **dermfluencer and expert validation**, because consumers need reasons to believe in efficacy beyond celebrity association.

Founder-led beauty — Drunk Elephant (Tiffany Masterson before Shiseido acquisition), Tower 28 (Amy Liu), Tatcha (Vicky Tsai before Unilever acquisition) — has the inverse problem: trust from founder expertise, awareness deficit. The winning strategy over-indexes on **volume micro-creator seeding** to compound reach. Running the same creator playbook for both brand types leaves half the opportunity on the table in both cases.

#### WHAT TO DO NOW

Identify which brand type you are. If your creator mix doesn't reflect it, that is the Q2 rebalance.

# 05

## FDA compliance is a 1,000-creator operations problem, not a legal review problem.

FDA rules on cosmetic vs. drug claims — the line between "cleanses" and "treats acne," between "moisturizes" and "repairs barrier damage" — apply to creator content as fully as to brand-owned marketing. At 1,000-creator scale, manual legal review is impossible. Every claim that leaks through without review is a potential FDA warning letter.

The operating system that works: **pre-approved claim libraries per product, forbidden-phrase lists, automated FTC disclosure reminders, and monitoring software** that flags creator posts with unapproved therapeutic language. Build the system once, and compliance becomes a workflow rather than a bottleneck.

### WHAT TO DO NOW

Document your approved claim library and forbidden-phrase list this week. If you do not have one, that is the compliance gap every scale-up reveals.

# 06

## AI search is now the first step in beauty discovery.

Beauty consumers researching "best retinol for sensitive skin," "best silk press serum," or "best tinted SPF 2026" increasingly ask ChatGPT, Perplexity, Gemini, or Claude before clicking through to Sephora, Ulta, or Amazon. The LLM answer is built from creator content,

dermfluencer teardowns, Amazon reviews, and trade publication coverage — **not from brand-owned marketing copy.**

This is GEO for beauty. The brands appearing in LLM answers are the ones producing consistent, specific creator content on ingredients, use cases, and outcomes. Brands producing only brand-voice social content are invisible in the answer layer.

#### WHAT TO DO NOW

Query the four major LLMs for 10 category questions in your space today. If you are absent, your creator strategy is also your GEO strategy.

## § 02 / CASE STUDIES

Three patterns *every beauty leader* should study.

#### CELEBRITY / MASS LAUNCH

## Rhode

Rhode: celebrity brand done with efficacy-first creator strategy

Rhode, founded by Hailey Bieber, built one of the most valuable celebrity beauty brands of the 2020s by pairing Bieber's cultural reach with a relentless efficacy-first creator program —

dermfluencer endorsements, ingredient transparency, and widespread social proof that the products actually performed. The May 2025 acquisition by e.l.f. Beauty for approximately \$1 billion reflected the rare combination of celebrity awareness with earned credibility. Most celebrity beauty brands get one and miss the other.

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#### THE LESSON

Celebrity beauty's hardest problem is not awareness — it is efficacy credibility. Over-invest in the dermfluencer and expert-validation layer from launch day one, and the awareness advantage converts to durable brand value.

#### CLEAN / FOUNDER-LED

## Merit

### Merit: restraint as category position in saturated beauty

Merit, founded by Katherine Power, built a rapidly scaling clean beauty brand by executing a deliberately restrained creator strategy — editorial-grade content, curated creator partnerships with strong aesthetic fit, and a distribution rollout (Sephora, Nordstrom, direct) that matched the brand positioning. Merit did not out-volume the category; it out-positioned it, with creator partnerships that read as extensions of the brand rather than disposable posts. The brand's strong Sephora performance reflects the positioning discipline.

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#### THE LESSON

In a category where 30,000 brands compete on TikTok, restraint is a positioning strategy. Not every beauty brand should scale to 1,000 creators; but the brand that chooses restraint has to execute the restraint at very high creative quality.

#### MASS SKINCARE / TIKTOK SHOP REVIVAL

# +55.5%

## CeraVe: mass skincare revival through creator-led launch infrastructure

CeraVe — long established as a dermatologist-recommended mass skincare brand — built a second growth curve on TikTok Shop by treating the platform as a launch infrastructure rather than a sales channel. Working with Pattern and NextWave on targeted affiliate networks, CeraVe activated creators not to promote but to demonstrate and contextualize — driving **55.5% GMV growth year-to-date** and proving that mass skincare brands can compete with DTC natives on the platform when the creator operation is correctly resourced.

### THE LESSON

Mass beauty brands are not too large for TikTok Shop — they are mis-structured for it. The opportunity is to reframe TTS as launch infrastructure and resource the creator operation at scale. The results follow.

§ 03 / INTERACTIVE

Assess your 1,000-creator *readiness* in 2 minutes.

Eight yes/no diagnostics separating beauty brands operating at the 2026 category-competitive scale from ones still running the 2022 playbook. Answer honestly.

Q.01

Do you seed product to at least 500 creators per quarter across micro, mid-tier, dermfluencer, and celebrity tiers?

YES

NO

NOT SURE

Q.02

Do you have long-term relationships with at least 20 dermfluencers or skinfluencers — not one-off deals?

YES

NO

NOT SURE

Q.03

Do you have pre-approved claim libraries and forbidden-phrase lists for every SKU to stay FDA-compliant at scale?

YES

NO

NOT SURE

Q.04

Do you have a monitoring system flagging creator posts with unapproved therapeutic claims or missing FTC disclosure?

YES

NO

NOT SURE

Q.05

Do you brief Sephora and Ulta buyers monthly with TikTok Shop GMV, dermfluencer endorsement, and Amazon review data?

YES

NO

NOT SURE

Q.06

Does your creator mix match your brand type — dermfluencer-heavy for celebrity brands, volume-micro-heavy for founder-led?

YES

NO

NOT SURE

Q.07

Have you queried ChatGPT, Perplexity, Gemini, and Claude for 10 category-specific questions in the last 90 days?

YES

NO

NOT SURE

Q.08

Do you track TikTok Shop GMV, Sephora and Ulta velocity per door, return rates, and LLM share of voice — not just impressions?

YES

NO

NOT SURE

§ 04 / PLAYBOOK

The seven-step *90-day plan* to stand up a 1,000-creator operation.

# 01

## Audit your current creator and retail footprint.

Pull 12 months of creator output, TikTok Shop GMV trend, Amazon review count per SKU, and velocity data across every retailer where you are listed. Most beauty brands have disconnected datasets; build a single integrated view this week.

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# 02

## Stand up the tiered creator stack at 1,000-creator scale.

Pipeline: 750-plus micro (10K-250K), 200-plus mid-tier (250K-1M), 30-plus dermfluencers or skinfluencers, 10-plus celebrity or mega. Seed 250-plus products per month. This is the operational scale that produces category-level breakout content.

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# 03

## Install an FDA and FTC compliance operating system.

Pre-approved claim libraries per product. Forbidden-phrase lists for unapproved therapeutic claims. Automated disclosure reminders. Monitoring software flagging violations. Train legal once; then run without review bottlenecks.

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# 04

## Build dedicated dermfluencer and skinfluencer relationships.

Identify 30 to 50 target dermfluencers and skincare experts. Build long-term relationships — ongoing access, first-look product, scientific advisory conversations — not one-off deals. The credibility economy in skincare and haircare is a 12-to-18-month investment, not a quarterly spend.

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## 05

### Engineer Sephora and Ulta buyer conversations with data.

Monthly one-page velocity report for each retail buyer: TikTok Shop GMV trend, dermfluencer endorsement log, Amazon review count and trajectory, creator-to-purchase conversion, return rate trend. Sephora and Ulta lead with velocity data — come prepared for that conversation.

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## 06

### Integrate retailer creator programs strategically.

Participate in Sephora Squad, Ulta Beauty, TikTok Shop Super Brand Days as partnership markers — not as a substitute for owned creator operations. Retailer-program participation signals commitment and concentrates earned media at launch moments.

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## 07

### Measure what actually moves the beauty business.

Report: TikTok Shop GMV growth, Sephora and Ulta velocity per door, Amazon review count and star trajectory, dermfluencer endorsement count and sentiment, return rate trend, LLM share of voice in category. Tie each to retail team and CFO numbers — not to impression totals.

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## Questions beauty *founders and marketers* are asking in 2026.

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Why has beauty's creator-seeding scale moved from 100 to 1,000 creators per quarter? +

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How do retail buyers at Sephora and Ulta use TikTok and creator data? +

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What is the dermfluencer and skinfluencer economy and why does it matter? +

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How should celebrity beauty brands structure their creator seeding differently from founder-led brands? +

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What's the right role for Sephora Squad, Ulta Beauty, and retailer-sponsored creator programs? +

How do beauty brands manage product claims compliance at 1,000-creator scale?



| WORK WITH US

## Ready to operate at the scale *the beauty category now requires?*

5W's Beauty & Wellness Practice builds and runs 1,000-creator operations for skincare, haircare, cosmetics, and fragrance brands — integrated with dermfluencer strategy, retailer relationship management, FDA/FTC compliance systems, and Sephora and Ulta velocity programs. The operating scale that turns a beauty brand into a category.

TALK TO THE BEAUTY & WELLNESS TEAM

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SISTER PLAYBOOK

## The CPG Creator Seeding Playbook 2026

### SISTER PLAYBOOK

## The TikTok-to-Whole-Foods Playbook for Food & Beverage 2026

### PRACTICE AREA

## 5W Beauty & Wellness Practice

### SOURCES & FURTHER READING

- 01 Pattern / BeautyMatter — 30,000+ beauty brands active on TikTok Shop; category growing at 26%; CeraVe TTS GMV up 55.5% YTD.
- 02 BeautyMatter / Pattern — TikTok Shop GMV up 94% YoY globally; fastest-growing marketplace among 70+ tracked.
- 03 eMarketer — TikTok Shop U.S. GMV exceeded \$15 billion in 2025; global projected \$87 billion in 2026.
- 04 Euromonitor — TikTok drove a 22% rise in beauty product sales across social platforms in 2024; beauty and personal care dominant TTS category.
- 05 Beauty Independent — Creator seeding typically generates approximately 3x ROI within 90 days (Rhodes / Pattern).
- 06 Rhode Skin — e.l.f. Beauty acquisition announcement, approximately \$1 billion, May 2025.
- 07 Sephora Squad, Ulta Beauty — retailer creator program documentation.
- 08 U.S. Food and Drug Administration — cosmetic vs. drug claims guidance for consumer products.
- 09 FTC Endorsement Guides (updated 2023) — creator disclosure requirements.
- 10 5W — Beauty & Wellness Practice research and client engagements.

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