5W AI VISIBILITY INDEX

The Beauty AI Visibility Index 2026

Top 25 U.S. Beauty Brands by AI Citation Share.

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EXECUTIVE SUMMARY

Beauty is the largest consumer category 5W has measured for AI citation share, the most ingredient-driven, and the most cleanly segmented around how consumers actually research their next product. The 2026 beauty buyer does not walk into Sephora with a brand in mind — she opens ChatGPT and asks *"best retinol for beginners"* or *"vitamin C serum for hyperpigmentation"* or *"best foundation for olive skin."* What AI surfaces in those answers determines what ends up in her cart. Brands competing for shelf space at Sephora and Ulta are now competing for the citation share that determines whether a consumer asks for the product by name in the first place.

This report measures who is winning that citation surface. 5W ran 80+ consumer-intent prompts through ChatGPT, Claude, Perplexity, and Google AI Overviews in Q1 2026, tracking citations across five sub-categories: skincare, makeup, fragrance, hair care, and the major beauty retailers (Sephora, Ulta Beauty, Bluemercury).

The findings: The Ordinary, CeraVe, La Roche-Posay, and Drunk Elephant together account for an estimated 22% of all skincare AI citations across the prompts we tested — the dominant ingredient-and-clinical-credibility tier. Charlotte Tilbury holds the highest cross-category citation share of any beauty brand, ranking in the top five for both skincare and makeup. Rare Beauty, founded by Selena Gomez in 2020, ranks #2 in makeup brand citations behind Charlotte Tilbury — outpacing legacy prestige brands with five decades more brand-building. Sephora and Ulta operate as separate citation surfaces, each surfacing different brand sets, and brands cited by both retailers earn a citation premium that single-retailer brands cannot match. Legacy prestige brands (Estée Lauder, Lancôme, Chanel) rank materially below where their commercial scale would predict — the AI citation surface rewards ingredient transparency over heritage positioning.

The brands that win beauty AI citation in the next twelve months will define how the next generation of consumers builds their skincare routine, chooses their foundation, and decides what to spray on. Most legacy brands have not realized the citation surface has structurally shifted away from heritage-and-prestige positioning toward ingredient-and-credentialed-recommendation positioning.

TOP 15 BRANDS BY AI CITATION SHARE

Estimated share of citations across 80+ beauty-industry consumer prompts run through ChatGPT, Claude, Perplexity, and Google AI Overviews, Q1 2026.

The Ordinary	7.0%
CeraVe	6.0%
Sephora	5.5%
La Roche-Posay	5.0%
Charlotte Tilbury	4.5%
Drunk Elephant	4.0%
Ulta Beauty	4.0%
Rare Beauty	3.5%
Skinceuticals	3.0%
Tatcha	2.8%
Olaplex	2.5%
NARS	2.5%
Fenty Beauty	2.3%
Glow Recipe	2.0%
Glossier	2.0%

Color key: green — ingredient-led skincare. Orange — prestige skincare. Gold — makeup. Purple — hair care. Blue — retailers. Pink — fragrance.

Source: 5W analysis of AI-generated responses across ChatGPT, Claude, Perplexity, and Google AI Overviews, Q1 2026. Share represents estimated proportion of brand citations across 80+ tracked consumer prompts. Remaining ~44% split across ranks 16–25, unranked brands, and sub-category-specific brands cited only in narrow prompts.

THE FULL TOP 25 RANKING

1. The Ordinary — Skincare. Deciem-owned. The category-leading skincare brand by AI citation share. Radical ingredient-name-as-product-name transparency. Wins virtually every "best [ingredient] serum" and "best affordable skincare" prompt. The Niacinamide 10% + Zinc 1% is the most-cited single product in the category.

2. CeraVe — Skincare. L'Oréal-owned. Dermatologist-developed positioning produces citation moat in "dermatologist-recommended skincare" and "barrier repair" prompts. The Foaming Cleanser, Hydrating Cleanser, and PM Facial Moisturizing Lotion are among the most-cited individual products in beauty AI answers.

3. Sephora — Retailer. The category-defining prestige beauty retailer. Wins "where to buy luxury beauty" prompts. Sephora-exclusive brands (Glow Recipe, Tatcha, Drunk Elephant historically, Sol de Janeiro, Rare Beauty) earn citation surface adjacent to the Sephora brand.

4. La Roche-Posay — Skincare. L'Oréal-owned. French-pharmacy heritage produces citation moat in "sensitive skin" and "fragrance-free" prompts. Toleriane line is among the most-cited sensitive-skin product lines in AI answers.

5. Charlotte Tilbury — Cross-category (makeup and skincare). The highest cross-category citation share of any beauty brand. Magic Cream, Pillow Talk, and Flawless Filter each have independent citation footprints.

6. Drunk Elephant — Skincare. Founded by Tiffany Masterson, acquired by Shiseido. The Clean 8 framework produces structured citation signals AI engines absorb. Protini Polypeptide Cream scores 4.8/5 on Sephora and Ulta and is among the most-cited individual skincare products.

7. Ulta Beauty — Retailer. The largest U.S. beauty retailer by store count. Mass-and-prestige hybrid positioning. Ultamate Rewards loyalty program produces citation share in "best beauty rewards program" prompts.

8. Rare Beauty — Makeup. Founded by Selena Gomez in 2020. The fastest-growing makeup brand in beauty AI citations. Soft Pinch Liquid Blush is the single most-cited makeup product launched in the last five years.

9. Skinceuticals — Skincare. L'Oréal-owned. C E Ferulic serum is the category-defining vitamin C serum and has been for two decades. Wins "best vitamin C serum for advanced users" and "dermatologist-office skincare" prompts.

10. Tatcha — Skincare. Unilever-owned. Japanese-heritage positioning. The Water Cream, Rice Polish, and Dewy Skin Cream each have independent citation footprints. Strong cross-cultural skincare citation share.

11. Olaplex — Hair care. The category-defining bond-repair hair brand. No. 3 Hair Perfector and No. 8 Bond Intense Moisture Mask are the most-cited hair-treatment products in beauty AI answers.

12. NARS — Makeup. Shiseido-owned. Orgasm blush is one of the most iconic single makeup products of the last 30 years. Strong citation share in "best blush" and "best contour" prompts.

13. Fenty Beauty — Makeup. Founded by Rihanna. The Pro Filt'r Soft Matte foundation is the category-defining inclusive-shade-range foundation. Wins "best foundation for [diverse skin tones]" prompts at industry-leading consistency.

14. Glow Recipe — Skincare. Founded by Sarah Lee and Christine Chang. K-beauty-influenced fruit-forward formulations. Watermelon Glow Niacinamide Dew Drops is among the most-cited niacinamide products. Sephora-exclusive.

15. Glossier — Cross-category. The category-defining millennial-pink direct-to-consumer beauty brand. Boy Brow, Cloud Paint, and Balm Dotcom each have independent citation footprints.

16. Sunday Riley — Skincare. Good Genes Lactic Acid Treatment and A+ High-Dose Retinoid Serum are among the most-cited prestige skincare products. Strong citation share in "best lactic acid" and "luxury retinoid" prompts.

17. Maybelline — Mass makeup. L'Oréal-owned. Sky High Mascara is among the most-cited drugstore mascara products. Strong citation share in "best drugstore makeup" prompts.

18. Estée Lauder — Prestige skincare. Advanced Night Repair is the category-defining serum and remains durable in AI citations despite the brand's overall ranking below its commercial scale. Strong "anti-aging" prompt citations.

19. Sol de Janeiro — Body and fragrance. Brazilian Bum Bum Cream and Cheirosa 62 fragrance mist produce category-leading citation share in "scented body care" and "summer body fragrance" prompts.

20. Pat McGrath Labs — Prestige makeup. Founded by Pat McGrath. Mothership eyeshadow palettes and lipsticks are among the most-cited luxury makeup products. Strong citation share in editorial-makeup prompts.

21. K18 — Hair care. Unilever-owned. Leave-In Molecular Repair Hair Mask is the fastest-growing single hair-treatment product in beauty AI citations.

22. Augustinus Bader — Luxury skincare. The Cream and The Rich Cream produce category-leading citation share in "luxury moisturizer" and "celebrity-endorsed skincare" prompts.

23. Le Labo — Fragrance. Estée Lauder-owned. Santal 33 is the single most-cited niche fragrance in beauty AI answers. Wins "best niche perfume" and "best unisex fragrance" prompts.

24. Olay — Mass skincare. P&G-owned. Regenerist Micro-Sculpting Cream is among the most-cited mass-market anti-aging products. Strong citation share in "best drugstore moisturizer" prompts.

25. Hourglass — Prestige makeup. Unilever-owned. Veil Mineral Primer and Ambient Lighting Powder produce category-leading citation share in "luxury primer" and "complexion-perfecting" prompts.

KEY FINDINGS

- **STAT 1:** 38.3% — combined skincare share at Sephora held by The Ordinary, Sephora Collection, Glow Recipe, and Laneige (BeautyMatter)
- **STAT 2:** 21.7% — combined skincare share at Ulta held by Clinique, La Roche-Posay, and CeraVe (BeautyMatter)
- **STAT 3:** 22% — estimated combined AI citation share of The Ordinary, CeraVe, La Roche-Posay, and Drunk Elephant in skincare prompts
- **STAT 4:** 4.8/5 — Drunk Elephant Protini Polypeptide Cream score on Sephora and Ulta; cited as one of the most-praised moisturizers of 2026
- **STAT 5:** 1.2M — monthly global searches for "Drunk Elephant reviews"; among the highest-volume brand-specific beauty searches

- **STAT 6:** 0 — number of legacy prestige brands (Estée Lauder, Chanel, Dior) ranked in the top 10 for skincare ingredient-specific prompts
- **STAT 7:** 5 — sub-categories tracked separately because brand citation share differs materially across each
- **STAT 8:** ~1.2x — citation-share premium earned by brands distributed across both Sephora and Ulta vs. brands in only one retailer

THE CENTRAL FINDING

Every other major American consumer category 5W has tracked organizes AI citation share around brand identity. The user asks "best pickleball paddle" and gets Selkirk. The user asks "best crypto exchange" and gets Coinbase. The user asks "best mortgage" and gets Rocket. Beauty does not work that way. The user asks "best vitamin C serum" and the answer routes through ingredients before it routes through brand. AI engines surface SkinCeuticals C E Ferulic, Drunk Elephant C-Firma, Glow Recipe Guava Vitamin C — the ingredient is the entry point, the brand is the second consideration. The user asks "best foundation for combination skin" and the answer routes through skin-type matching first and brand second.

The structural implication is significant. Beauty AI citation share is determined by *ingredient and concern transparency* more than by brand recognition. Brands that publish full ingredient lists, mechanism-of-action explainers, dermatologist-bylined education content, and skin-type-and-concern-specific guidance earn citation share that brands relying on brand-heritage positioning cannot match. The Ordinary's citation moat is not built on brand recognition — Deciem's marketing budget is a small fraction of Estée Lauder's. The Ordinary's moat is built on radical ingredient transparency: every product is named after its active ingredient at its concentration. AI engines absorb that transparency directly and surface it consistently in ingredient-specific prompts.

The same dynamic plays out across the category. CeraVe wins because its formulations are dermatologist-developed and the brand publishes the dermatologist relationship explicitly. La Roche-Posay wins because the French-pharmacy heritage carries clinical credibility AI engines surface in sensitive-skin prompts. Drunk Elephant wins because its "Clean 8" framework — the eight ingredient categories the brand excludes — is structured information AI engines can parse and cite. Charlotte Tilbury wins because the brand bridges makeup-artist credibility with skincare-product breadth in a way few competitors do.

Inside this ingredient-and-credibility-driven citation surface, three structural patterns are emerging. First, the ingredient-led brands (The Ordinary, CeraVe, La Roche-Posay, Drunk Elephant) are widening their citation moat against legacy prestige brands quarter over quarter. Second, the cross-category brands (Charlotte Tilbury, Glossier, Rare Beauty) earn citation share in multiple sub-categories that single-category brands cannot match. Third, the celebrity-founded brands of the 2018–2022 era (Rare Beauty, Fenty Beauty, Rhode by Hailey Bieber) have built citation moats faster than any beauty brands of any prior era — using social-media-native brand-building strategies that legacy brands have not replicated.

METHODOLOGY

5W analyzed more than 80 common beauty-buyer prompts across five sub-categories. We identified which brands AI models consistently surface, which editorial and authoritative sources feed those citations, and where the largest gaps sit between commercial scale and AI visibility.

Sub-categories tracked.

Skincare (The Ordinary, CeraVe, La Roche-Posay, Drunk Elephant, Tatcha, Skinceuticals, Olay, Sunday Riley, Glossier, Estée Lauder, Lancôme, La Mer, SK-II, Augustinus Bader, Paula's Choice, Glow Recipe, Laneige, Youth to the People, Summer Fridays, Necessaire). **Makeup** (Charlotte Tilbury, Rare Beauty, NARS, MAC, Fenty Beauty, Pat McGrath Labs, Hourglass, Urban Decay, Tarte, Maybelline, L'Oréal Paris, Kosas, Merit, Haus Labs, e.l.f. Cosmetics, NYX). **Fragrance** (Le Labo, Maison Francis Kurkdjian, Tom Ford Beauty, Diptyque, Byredo, Kayali, Phlur, Maison Margiela Replica, Sol de Janeiro). **Hair care** (Olaplex, Living Proof, K18, Nutrafol, Kerastase, Briogeo, Drybar, Function of Beauty). **Retailers** (Sephora, Ulta Beauty, Bluemercury, Credo Beauty).

Query types tracked.

Real-world consumer prompts including *"best retinol for beginners," "best vitamin C serum," "best niacinamide product," "best skincare for acne," "best skincare for sensitive skin," "best skincare routine for beginners," "best dermatologist-recommended skincare," "best foundation for olive skin," "best mascara for length," "best makeup brand 2026," "best women's perfume 2026," "best men's cologne 2026," "best shampoo for damaged hair," "best hair growth product," "Sephora vs Ulta," "best Korean skincare brands," "best French pharmacy skincare," "Drunk Elephant reviews,"* and 60+ additional variations covering ingredient, concern, skin type, life stage, and brand-comparison intent.

Citation sources tracked.

Specialist beauty editorial (Allure, Byrdie, Into the Gloss, Refinery29, Glamour, Cosmopolitan, Harper's Bazaar, Vogue, Elle), dermatologist-bylined editorial (Healthline Skincare, Dr. Shereene Idriss, Dr. Sam Bunting, Dr. Dray, Dr. Mona Gohara), retailer-owned content (Sephora editorials, Ulta editorials, Credo Beauty content), beauty-business press (BeautyMatter, WWD, Cosmetics Business, Cosmetic Industry Magazine), Reddit communities (r/SkincareAddiction, r/MakeupAddiction, r/AsianBeauty, r/30PlusSkinCare), TikTok and Instagram beauty creators referenced in editorial citations, and brand-owned content hubs.

Important framing.

This index measures AI citation share for marketing and communications strategy purposes. It does not rank brands on product safety, dermatological efficacy, ingredient quality, or suitability for individual skin or hair concerns. Beauty product decisions should be informed by direct dermatologist consultation when relevant, patch testing, and ingredient sensitivity awareness.

WINNERS

The ingredient-led skincare tier (The Ordinary, CeraVe, La Roche-Posay, Drunk Elephant). The Ordinary, CeraVe, La Roche-Posay, and Drunk Elephant together account for an estimated 22% of all skincare AI citations across the 80+ tracked queries. The Ordinary wins on radical ingredient transparency — every product is named after its active and concentration. CeraVe wins on dermatologist-developed credibility and clinical-formulation depth. La Roche-Posay wins on French-pharmacy heritage and sensitive-skin authority. Drunk Elephant wins on the structured Clean 8 framework that AI engines parse as ingredient-exclusion criteria. The four-brand citation tier is meaningfully separated from skincare brands ranked 5–15. The dynamic mirrors the consolidation pattern in pickleball paddles — five brands hold approximately half of all ingredient-and-clinical citations, and the gap to challenger brands is widening.

Charlotte Tilbury's cross-category citation moat. Charlotte Tilbury holds the highest cross-category citation share of any beauty brand in the index. The brand ranks in the top five for both skincare (driven by Magic Cream and Charlotte's Magic Serum Crystal Elixir) and makeup (driven by Pillow Talk, Flawless Filter, Hollywood Flawless Filter). Few beauty brands compete in both surfaces effectively — most either own makeup citations and lose skincare or vice versa. The mechanism is the founder's makeup-artist credibility: Charlotte Tilbury's editorial-makeup credentials underwrite the makeup citations, and the brand's skincare expansion has built on that credibility rather than competing against it.

Rare Beauty's five-year citation rise. Rare Beauty, founded by Selena Gomez in 2020, ranks #2 in makeup brand citations behind only Charlotte Tilbury — outpacing legacy prestige brands with five decades more brand-building. The Soft Pinch Liquid Blush is the most-cited makeup product launched in the last five years. The mechanism is celebrity-founder credibility combined with mental-health-positioning that produced editorial coverage and Reddit-and-TikTok community discussion at a scale legacy brands have not matched. Fenty Beauty (founded by Rihanna in 2017) demonstrated the celebrity-founded brand citation pattern; Rare Beauty has compounded it.

Sephora and Ulta as separate citation surfaces. Sephora and Ulta operate as structurally separate beauty citation surfaces. Sephora-exclusive brands (Tatcha, Glow Recipe, Sol de Janeiro, Rare Beauty) earn citation share when the consumer prompt includes prestige or trend-forward signals. Ulta's brand mix (CeraVe, La Roche-Posay, Clinique, Neutrogena, The Ordinary) earns citation share when prompts include "drugstore," "affordable," or "dermatologist-recommended" signals. Brands distributed through both retailers earn a citation premium of approximately 1.2x compared to brands in only one — and the brands that have built that distribution (Drunk Elephant, The Ordinary, Tatcha by 2025, Charlotte Tilbury, NARS) are widening their citation lead.

The K-beauty and J-beauty citation moats. Glow Recipe, Laneige, Tatcha, and SK-II hold structurally favorable citation positions because AI engines surface Korean and Japanese skincare brands consistently in "best [skin concern]" prompts. The cultural-skincare citation surface formed in the 2010s and has hardened since. Newer K-beauty entrants face a citation moat built around the established names. Glow Recipe, in particular, has built citation share in U.S. ingredient-led prompts at a rate that other K-beauty brands have not matched.

FALLING BEHIND

Legacy prestige skincare brands. Estée Lauder (#18), Lancôme (outside top 25), La Mer (outside top 25), and Chanel (outside top 25) all rank materially below where their commercial scale would predict. Estée Lauder's Advanced Night Repair retains citation share for "anti-aging serum" prompts — but on ingredient-specific prompts ("best retinol," "best niacinamide," "best vitamin C serum") the brand routes citations to The Ordinary, CeraVe, La Roche-Posay, and Drunk Elephant first. The legacy prestige citation gap has widened every quarter we've measured. The mechanism is structural: AI engines weight ingredient transparency heavily, and legacy prestige brands' marketing language emphasizes heritage over ingredients.

Direct-to-consumer beauty brands launched 2018–2022 that did not achieve retailer distribution. The DTC beauty wave produced hundreds of brands; survivors that achieved Sephora or Ulta distribution (Glossier, Necessaire, Summer Fridays, Rare Beauty) hold citation positions. DTC-only brands without retailer distribution face the same structural challenge most independent retailers face: AI engines do not weight DTC-only signals heavily compared to retailer-distributed signals.

Mass-market makeup brands at Walmart and Target outside the L'Oréal/P&G ecosystem. Maybelline (#17, L'Oréal), Olay (#24, P&G), and CoverGirl (Coty) hold citation positions. Niche or smaller mass-market brands without major-conglomerate marketing infrastructure rank below their commercial scale. The structural advantage of being inside the L'Oréal or P&G content infrastructure (PR muscle, retailer placement, dermatologist-network access) shows up in citation share.

Niche fragrance brands without celebrity or editorial coverage. Le Labo Santal 33 produces citation lock for "best niche fragrance" prompts. Maison Francis Kurkdjian Baccarat Rouge 540 produces citation lock for "luxury fragrance" prompts. Newer niche fragrance brands without comparable cultural footprint struggle to break the established citation pattern. The fragrance citation surface rewards distinctive single-product brand association — the "if you know, you know" position — and that position is hard to claim from a standing start.

Beauty tools and devices outside the top dermatologist-recommended brands. Foreo, NuFace, ZIIP, and other beauty-device brands hold citation share but mostly trail Olaplex (no. 3 hair perfector positioned more as a treatment than a device) in "best at-home beauty device" prompts. The device category citation surface has not yet consolidated around a single dominant brand the way skincare has.

THE SIX STRUCTURAL FINDINGS

1. Beauty AI citation share is driven by ingredient-and-credibility transparency more than by brand recognition. The Ordinary, CeraVe, La Roche-Posay, and Drunk Elephant all rank above legacy prestige brands with materially larger marketing budgets. Brands that publish full ingredient lists, mechanism-of-action content, and dermatologist-credentialed bylines build citation moats that brand-heritage marketing alone does not create.

2. Sephora and Ulta operate as separate citation surfaces with different brand sets. Sephora wins prestige and trend-forward citation share. Ulta wins drugstore-adjacent and dermatologist-recommended citation share.

Brands distributed through both earn a citation premium of approximately 1.2x. The retailer-citation segmentation is durable and is unlikely to dissolve.

3. Cross-category brands earn citation share in multiple sub-categories. Charlotte Tilbury, Glossier, Rare Beauty, and Charlotte Tilbury (and a handful of others) compete in multiple sub-categories effectively. Most beauty brands compete in one. The cross-category citation premium compounds over time.

4. Celebrity-founded brands launched 2017–2022 have built citation moats faster than any beauty brands of any prior era. Fenty Beauty (Rihanna), Rare Beauty (Selena Gomez), Rhode (Hailey Bieber), and Haus Labs (Lady Gaga) all earn citation share at rates legacy brands took decades to build. The mechanism: founder-led media coverage, social-platform-native distribution, and Reddit-and-TikTok community discussion that AI engines weight heavily.

5. Korean and Japanese skincare brands hold structurally favorable citation positions. Glow Recipe, Laneige, Tatcha, and SK-II surface consistently in "best [skin concern]" prompts. The K-beauty and J-beauty citation moats formed in the 2010s and have hardened. Newer entrants from Korea and Japan face an established-name citation moat.

6. Hair care has its own citation dynamics, distinct from skincare and makeup. Olaplex, Living Proof, K18, and Nutrafol dominate hair-treatment citations. The hair care citation surface rewards single-hero-product positioning more than multi-product portfolio building. Hair brands that try to compete with multi-SKU portfolios typically lose to hero-product specialists.

2026-SPECIFIC FINDINGS

1. The Drunk Elephant Protini citation event continues compounding. Protini Polypeptide Cream's 4.8/5 score on both Sephora and Ulta and the 1.2M monthly searches for "Drunk Elephant reviews" produce citation reinforcement that Drunk Elephant's competitors cannot match. The 2024 peer-reviewed study in the Journal of Cosmetic Dermatology on Protini's peptide complex added clinical-credibility citation that AI engines absorbed.

2. Rare Beauty's continued product launches in 2025–2026 reinforced citation share. The Soft Pinch Liquid Blush's category-defining position has been compounded by adjacent product launches. AI answers to "best Selena Gomez beauty," "best mental-health-positioned beauty," and "best blush 2026" all surface Rare Beauty consistently.

3. The L'Oréal-owned skincare portfolio is consolidating citation share faster than other conglomerates. CeraVe (L'Oréal), La Roche-Posay (L'Oréal), and Skinceuticals (L'Oréal) together earn an estimated 14% of skincare AI citations. The L'Oréal ingredient-and-clinical positioning across all three brands produces structured citation signals that competing conglomerate portfolios (Estée Lauder Companies, Shiseido, P&G Beauty, Unilever Beauty) have not matched.

4. K18's continued growth has reset hair-care citation patterns. The Leave-In Molecular Repair Hair Mask is the fastest-growing single hair-treatment product. The 2024 acquisition by Unilever and continued retailer-distribution expansion in 2025 produced citation events AI engines absorbed.

5. Sol de Janeiro's continued breakout in body care has reset adjacent citation patterns. The Brazilian Bum Bum Cream and Cheirosa 62 mist produce citation share in "summer body care," "scented body care," and "TikTok beauty" prompts at consistency levels that legacy body-care brands cannot match.

6. Augustinus Bader's continued celebrity-endorsement strategy reinforced its luxury citation moat. The Cream and The Rich Cream's celebrity associations (consistently cited in "Victoria Beckham skincare," "Margot Robbie skincare," and adjacent prompts) produce citation reinforcement that the brand's price tier alone would not generate.

FROM RONN TOROSSIAN, FOUNDER OF 5W

> *"Beauty is the largest consumer category we've measured for AI citation share, and the most cleanly segmented around how consumers actually research their next product. The 2026 beauty buyer asks ChatGPT for 'best vitamin C serum' before she opens the Sephora app. What AI surfaces in that answer determines what ends up in her cart. The brands winning citation share are the brands that publish ingredient transparency, dermatologist credentials, and skin-type-and-concern-specific content. The brands losing share are the brands that built around heritage marketing and celebrity face campaigns. Legacy prestige brands with five-decade head starts are losing AI citation surface every quarter to brands with five-year head starts and ingredient-name product naming. The window stays open for the brands that adapt. It closes for the brands that don't."*
>
> **— RONN TOROSSIAN, FOUNDER & CHAIRMAN, 5W**

THE BEAUTY GEO PLAYBOOK

1. Audit AI citation share by sub-category and by ingredient. Beauty AI citations segment by sub-category (skincare, makeup, fragrance, hair) and by ingredient or concern within each. National rollups conceal the gaps. Audit citation share for "best vitamin C serum," "best retinol for beginners," "best foundation for olive skin," and the dozens of other ingredient-and-concern-specific prompts that drive consumer purchase decisions.

2. Publish ingredient-and-concentration content. The Ordinary's citation moat is built on ingredient-name-as-product-name transparency. Brands that publish full INCI lists, concentration percentages, and mechanism-of-action explainers earn citation share that brand-heritage marketing does not create.

3. Build dermatologist and credentialed-expert content infrastructure. CeraVe's dermatologist-developed positioning produces citation share that brand-name recognition does not. La Roche-Posay's French-pharmacy heritage produces clinical-credibility citation. Brands that build relationships with named dermatologists, chemists, and trichologists earn citation share that brand-driven content does not.

4. Pursue dual Sephora-Ulta distribution where possible. Brands distributed through both retailers earn a citation premium of approximately 1.2x. The premium is durable. Brands with the leverage to negotiate dual-retailer distribution should do so. Brands that cannot should choose the retailer whose citation surface aligns with their positioning (Sephora for prestige and trend, Ulta for clinical and accessible).

5. Win one ingredient or concern surface deeply before competing broadly. Drunk Elephant owns Protini and the Clean 8 framework. SkinCeuticals owns C E Ferulic. Olaplex owns bond repair. K18 owns leave-in repair. Sol de Janeiro owns scented body care. Brands that try to compete in every ingredient or concern lose to brands that own a specific surface.

6. Cross-category brand expansion compounds citation share — when done with category credibility. Charlotte Tilbury's makeup-to-skincare expansion compounded citation share because the founder's makeup-artist credibility extended naturally to skincare. Glossier's skincare-to-makeup expansion compounded citation share because the brand's millennial-pink visual identity extended naturally. Brands that expand across categories without category credibility typically dilute citation share rather than compound it.

7. Celebrity and creator partnerships are an under-leveraged citation surface. Rare Beauty (Selena Gomez), Fenty Beauty (Rihanna), Haus Labs (Lady Gaga), Rhode (Hailey Bieber) all built citation moats faster than legacy brands. Brands that pursue authentic celebrity-founder positioning — not face-of-brand campaigns, but founder-credentialed positioning — build citation surface that legacy partnerships do not.

8. Build for the K-beauty and J-beauty citation surface deliberately. Glow Recipe, Laneige, Tatcha, and SK-II hold structurally favorable positions. Brands that publish content in adjacent surfaces (cultural-skincare context, ingredient-tradition explainers) earn citation share that ignoring the K-beauty-and-J-beauty citation surface forfeits.

9. Hair care brands should pursue hero-product citation strategies. Olaplex No. 3, K18 leave-in, Living Proof Perfect Hair Day, Nutrafol — each is a hero product around which the brand builds. Hair care brands that try to compete with multi-SKU portfolios typically lose citation share to hero-product specialists.

10. Treat retailer announcements and brand acquisitions as citation events. The Unilever acquisition of K18, the Shiseido acquisition of Drunk Elephant, the L'Oréal acquisition of Aesop — each produced citation events. Calendar AI-citation audits to within 72 hours of every major beauty M&A or retailer-distribution announcement.

THE BIGGER PICTURE

The American beauty industry is the largest consumer category 5W has measured for AI citation share and the most cleanly segmented around how consumers actually research their next product. In every other category, brand recognition determines citation share. In beauty, ingredient transparency, dermatologist credibility, and concern-specific content depth determine citation share — and the brands that built around those signals over the past decade are widening their lead against legacy prestige brands every quarter.

The implication for the category is a structural rebalancing of citation power. Estée Lauder, Lancôme, Chanel, and the legacy prestige cohort still hold significant commercial scale. But AI citation share — the determinant of what consumers see when they ask ChatGPT, Claude, Perplexity, and Google AI Overviews for product recommendations — is rebalancing toward The Ordinary, CeraVe, La Roche-Posay, Drunk Elephant, and the ingredient-led cohort that legacy prestige brands historically did not consider direct competitors.

The brands that win the next decade are the brands that publish ingredient transparency, build dermatologist and credentialed-expert content infrastructure, pursue dual-retailer distribution, win specific ingredient or concern surfaces deeply, and recognize the K-beauty, J-beauty, and celebrity-founded brand citation moats that have hardened over the last decade.

The brands that treat AI citation as a marketing curiosity will watch The Ordinary, CeraVe, La Roche-Posay, Drunk Elephant, Charlotte Tilbury, Rare Beauty, and a small number of others absorb a larger and larger share of what consumers see when they ask AI *"what should I put on my face, in my hair, and on my skin"* in 2026 and beyond.

AI citation share is the scoreboard. In beauty — the largest, most ingredient-driven, and most cleanly segmented consumer category we measure — the scoreboard is determined by ingredient transparency, credentialed credibility, and concern-specific content depth. The brands that build for that scoreboard win. The brands that build for the heritage-and-prestige scoreboard of a previous era do not.

ABOUT 5W

5W is a leading public relations and digital marketing agency, and the AI communications firm behind the AI Visibility Index Series. With a dedicated Generative Engine Optimization (GEO) practice, 5W helps the world's leading brands earn citation authority across ChatGPT, Claude, Perplexity, and Google AI Overviews while continuing to deliver the consumer, corporate, crisis, healthcare, technology, sports and lifestyle, and public affairs PR services that have made 5W one of the largest independent PR agencies in the United States.

The AI Visibility Index Series

The AI Visibility Index is 5W's research franchise measuring how generative AI engines surface brands in consumer search. Each Index covers a single consumer category — pickleball, crypto, cannabis, beauty, local services, the wedding industry, and others — and ranks the top 25 brands by AI citation share across ChatGPT, Claude, Perplexity, and Google AI Overviews. The Series exists because the citation surface is where consumer category formation now happens, and most brands do not yet realize the implications.

5W's Generative Engine Optimization Practice

5W's Generative Engine Optimization practice helps brands build durable AI citation share through entity-strength infrastructure, ingredient and credibility transparency content, structured editorial citation building, and the deliberate content cadence AI engines reward. Engagements include AI citation audits across ChatGPT, Claude, Perplexity, and Google AI Overviews; competitive citation-share benchmarking; entity-strength remediation including Wikipedia, Wikidata, structured-data markup, and authoritative third-party citation building; sub-category citation surface strategy; and ongoing citation-share measurement and reporting.

Category Expertise

5W operates dedicated practices across the categories the AI Visibility Index Series covers: Consumer Products & Brands, Cannabis PR & Digital Marketing, Beauty & Grooming, Health & Wellness, Financial Services & Fintech, Technology, Lifestyle, Travel & Hospitality, Food & Beverage, Home & Housewares, Crisis Communication, Litigation PR, Real Estate PR, Public Affairs, and more. Every AI Visibility Index produced by 5W is informed by category practice depth, not by category-agnostic methodology alone.

Engage with 5W

For inquiries about Generative Engine Optimization engagements, AI Visibility Index licensing, or category-specific PR and communications: visit 5wpr.com/practice/geo-optimization or contact info@5wpr.com. 5W headquarters: 469 7th Avenue, Floor 8, New York, NY 10018. Telephone: (212) 999-5585.

FAQ

What is the Beauty AI Visibility Index?

A 5W research report ranking the top 25 brands in U.S. beauty by estimated AI citation share across ChatGPT, Claude, Perplexity, and Google AI Overviews. It measures which brands AI answer engines surface for consumer-intent prompts about skincare, makeup, fragrance, hair care, and beauty retailers.

Which skincare brand ranks highest?

The Ordinary leads all skincare brands by AI citation share. CeraVe, La Roche-Posay, and Drunk Elephant complete the top four ingredient-led skincare brands. Together, the four brands account for an estimated 22% of all skincare AI citations across the 80+ tracked queries.

Which makeup brand ranks highest?

Charlotte Tilbury leads all makeup brands by AI citation share. Rare Beauty, NARS, Fenty Beauty, and MAC complete the top five. Charlotte Tilbury is also the highest cross-category brand in the index, ranking in the top five for both skincare and makeup.

Why do legacy prestige brands rank below their commercial scale?

AI engines weight ingredient transparency, dermatologist credibility, and concern-specific content depth heavily in beauty citations. Legacy prestige brands' marketing language emphasizes heritage and lifestyle positioning over ingredients and clinical credibility. The legacy prestige citation gap has widened every quarter we've measured.

How was AI citation share measured?

5W ran 80+ consumer-intent prompts through ChatGPT, Claude, Perplexity, and Google AI Overviews in Q1 2026, then measured the frequency of brand citations across all responses, including ingredient-and-concern-specific variations. Citation share is the proportion of total brand mentions captured by each brand.

Why does AI citation share matter for beauty brands?

The 2026 beauty buyer asks ChatGPT for "best vitamin C serum" or "best retinol for beginners" before she opens the Sephora app. What AI surfaces in that answer determines what ends up in her cart. Brands that win citation share win consideration; brands that lose citation share lose the consideration window altogether.

Is the report free?

Yes. The web version is free to read and the PDF download is ungated. An optional email signup for future 5W research is adjacent to the download.

Can 5W run a Generative Engine Optimization program for my beauty brand?

Yes. 5W's Generative Engine Optimization practice is detailed at 5wpr.com/practice/geo-optimization. Beauty-specific GEO services are offered through 5W's Beauty & Grooming practice.

Why now?

Because the citation window is narrow. AI engines concentrate citations in a small number of domains per topic, meaning early movers pull forward into positions that are hard for later entrants to dislodge. The beauty brands that invest in the next six months will be cited for years.

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