UK Industry Report

Beauty & Personal Care: Who actually wins organic shopping visibility



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Director of Organic Search

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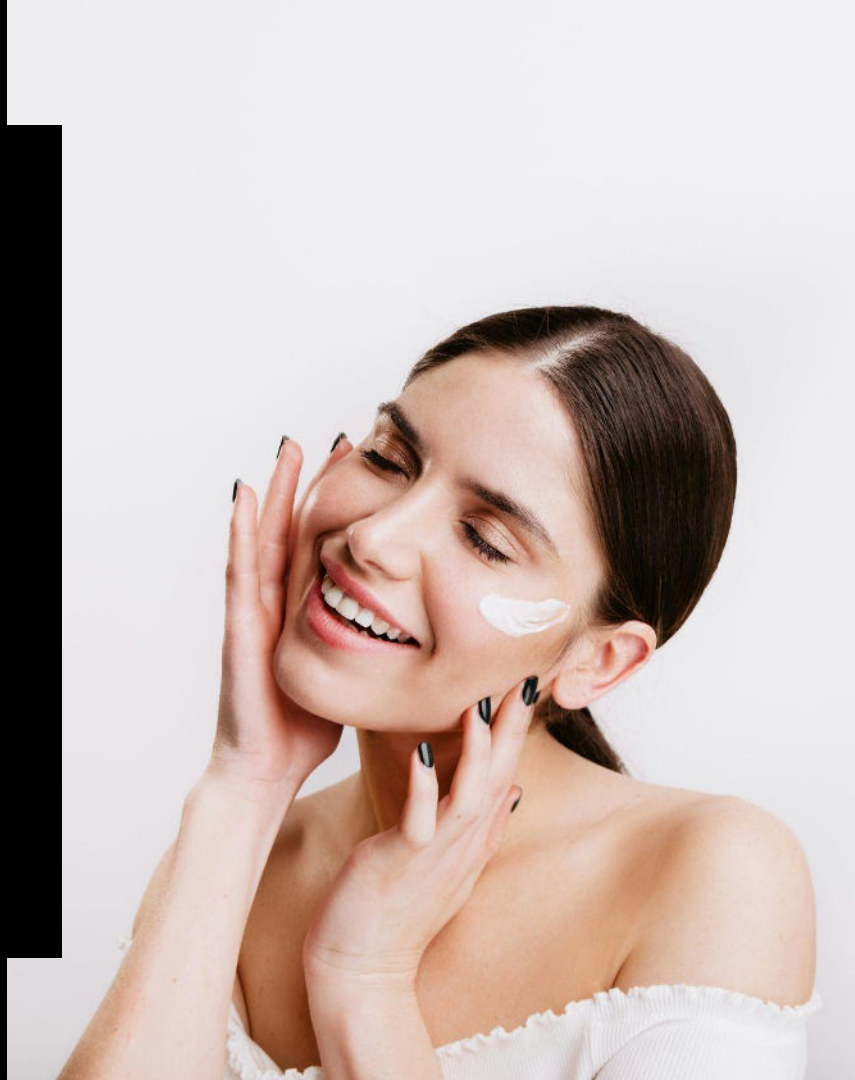


01

Executive Summary

The key findings from 5,000 Google searches and 300 ChatGPT prompts.

Executive summary

Google's organic shopping grids are wide open. ChatGPT agrees with Google on the winner less than half the time, and the brands it recommends rarely make the sale.

We set out to prove a thesis: organic shopping in beauty and personal care is broad, fragmented and full of opportunity. Google proved it, ChatGPT complicated it.



Written by
Callum Lockwood, Director of Organic Search

The headline numbers

Three numbers to remember

43%

of the time, Google and ChatGPT pick the same winning retailer.

7 in 10

beauty subcategories where ChatGPT shows Amazon as the top seller.

96 of 98

times ChatGPT's top-recommended brand didn't make the sale.

How we did it

Two shelves, measured side by side

Google organic shopping

5,000 UK search terms

937 sellers named

11 categories

Measured with Productrise. Snapshot August 2026.

vs

ChatGPT shopping

300 UK buying prompts

9 days of live data

103 matched subcategories

Measured with Peec.ai. 6 to 14 August 2026.

Research by the team trusted by:

asics · UNDER ARMOUR · ocado · FATFACE · healthspan · VIVOBAREFOOT

At a glance

Six findings that matter

1 in 8

hair searches show no organic product listings at all.

38%

held by the leading seller in every one of the 11 categories.

6.8×

The Perfume Shop's share is higher in fragrance than overall.

79%

of subcategories have Amazon or Boots in the top organic spot.

94 cases

of organic shopping visibility is held by the top 5 sellers.

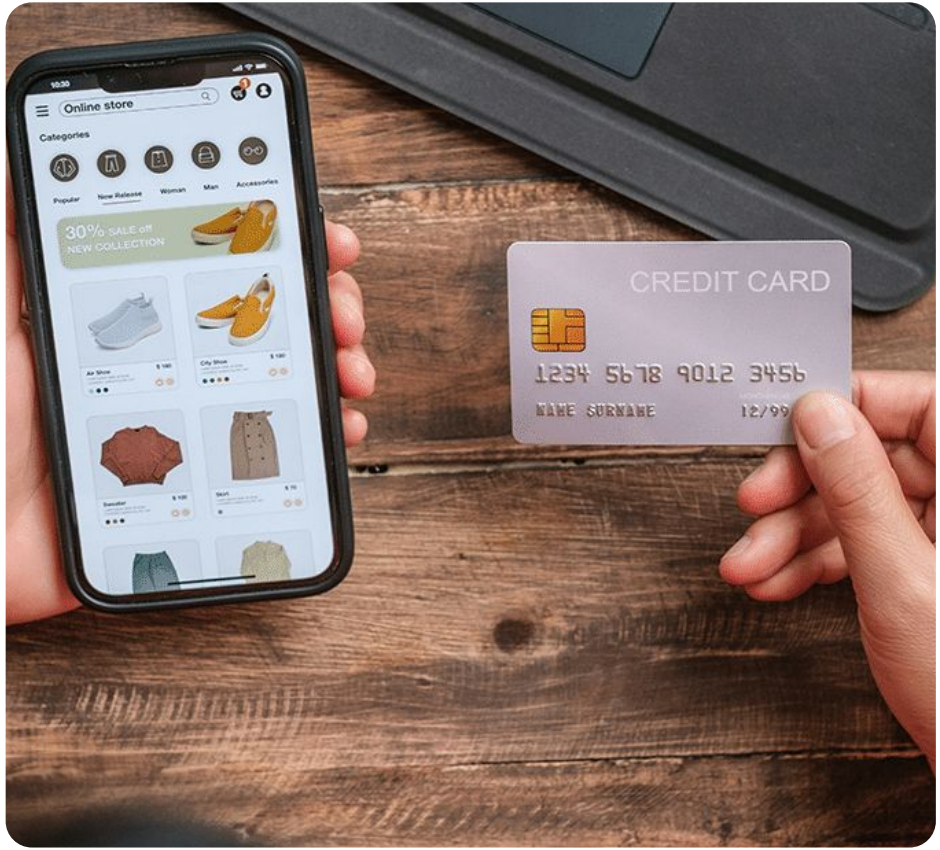
831 vs 4

Moroccanoil and Olaplex recommendations vs times either was the merchant.

02

The state of Google organic shopping

Who wins the organic product grids across 5,000 UK beauty searches.



Part 1

Everything is to play for

No seller runs away with any beauty category. The leader holds under 20% in all 11, and under 10% in four of them.

<20%

Highest share held by any single seller in any category

Why is this happening?

Search engines can only show what they can match

The most likely cause is product data. When these three don't line up, even big retailers miss searches they should win.

Product feed

What you send Google Shopping

+

Structured data

What your pages declare to machines

+

Website content

What shoppers and crawlers read

=

A match

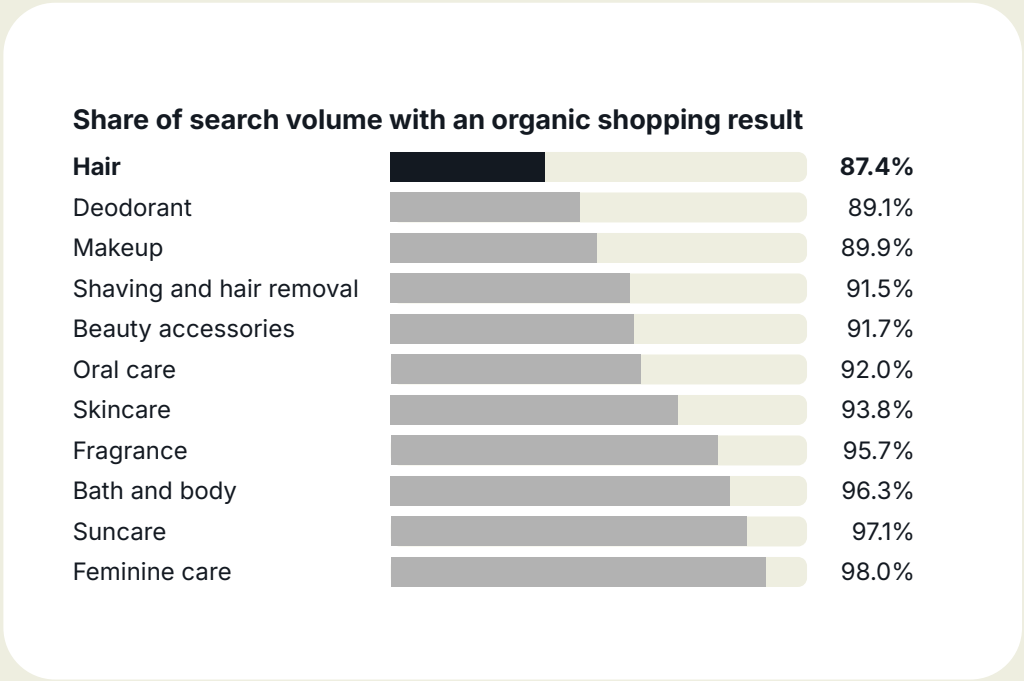
Your product appears in the grid, and in ChatGPT

The coverage gap

Not every beauty search is shoppable

90.8% of searches return at least one organic shoppable listing. Coverage depends on how often Google can match a search to products.

Hair is the least shoppable category. Feminine care is the most.



Source: Re:signal analysis of Productrise data. 5,000 UK search terms, August 2026. Axis starts at 80%.

Re:signal



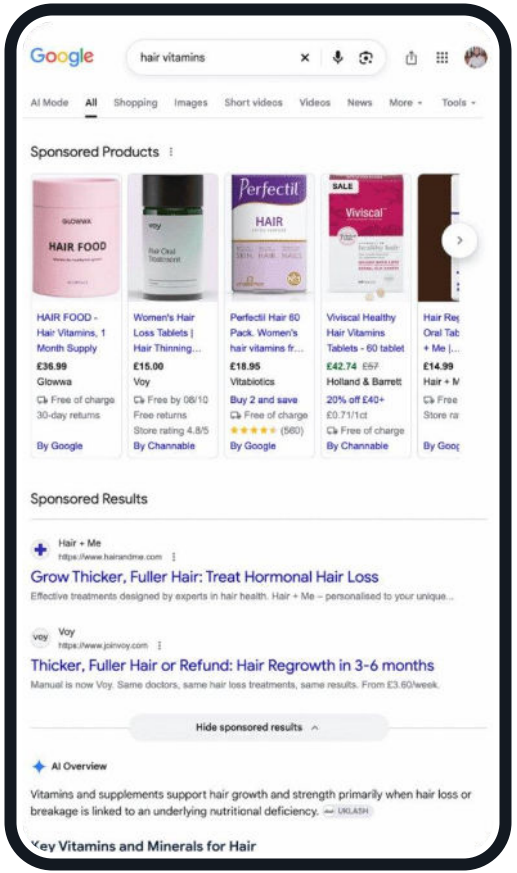
Hair

1 in 8 hair searches show no organic product listings

Almost every feminine care (98.0%) and suncare (97.1%) search does. Hair sits at 87.4%.



Each block is one in eight hair searches. The empty block returns no organic shopping grid.



In the wild

"Hair vitamins": paid products, no organic grid

Sponsored products, sponsored results and an AI Overview. No organic shopping grid anywhere on the page. Captured October 2026.

What this means

Where Google can't match a search to products, nobody wins it organically.

An open goal for the first brand whose product data makes the match easy.



SIGMA SPORTS

Cycling, sport and triathlon retail, UK

+65%

Organic shopping revenue, YoY

6:1

return on investment

+34%

share of voice vs competitors

Case study

Organic shopping masterclass for Sigma Sports.

Objective

Restart organic shopping revenue growth, which had stalled with one feed serving both paid and organic search.

WHAT WE DID

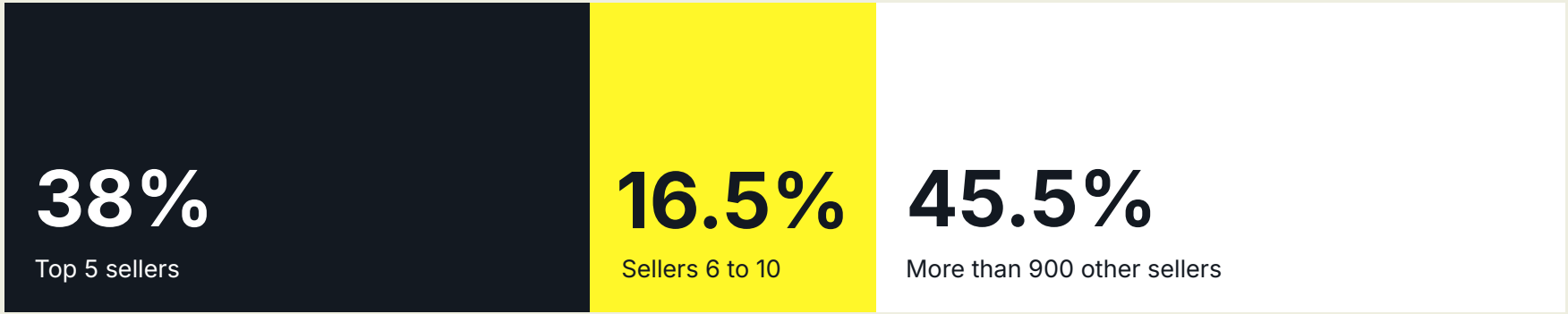
Built a separate organic feed tuned to real search demand, fixed product page and schema issues, and made product data consistent across pages, schema and Merchant Center. Organic shopping conversion rate rose 25%.

> “Re:signal made some solid recommendations, implemented the changes required and the uplift speaks for itself.”
>
> **James Roberts, SEO Manager**

Re:signal

Concentration

Visibility is spread across 900+ sellers



Share of total organic shopping visibility. Top 10 hold 54.5%; sellers 6 to 10 calculated as the difference.
Source: Re:signal analysis of Productrise data. 5,000 UK search terms, August 2026.

Nearly half of all visibility sits outside the top 10.

There's room for smaller sellers in every category.

Category by category

Which categories are up for grabs

Ranked from most locked down to most open. Argos leads shaving and hair removal with just 8.9%.

Key:

- Leader share
- Top 3 combined

1	**Makeup** Amazon Marketplace	16.3%	37.1%
2	**Suncare** Boots.com	14.7%	35.2%
3	**Beauty accessories** Amazon Marketplace	18.8%	31.5%
4	**Oral care** Amazon.co.uk	12.0%	30.3%
5	**Deodorant** Amazon.co.uk	14.6%	27.8%
6	**Hair** Amazon Marketplace	12.7%	27.0%
7	**Skincare** Boots.com	9.9%	27.0%
8	**Fragrance** John Lewis and Partners	10.6%	26.7%
9	**Bath and body** Amazon.co.uk	9.8%	26.5%
10	**Feminine care** Amazon	9.4%	25.4%
11	**Shaving and hair removal** Argos	8.9%	23.4%

Source: Re:signal analysis of Productrise data. 5,000 UK search terms, August 2026.

Re:signal

The generalists

01	**Amazon Marketplace** Present in all 11 categories	11.0%
02	**Boots.com** Present in all 11 categories	9.3%
03	**Superdrug.com** Present in all 11 categories	6.7%
04	**Amazon.co.uk** Present in all 11 categories	6.1%
05	**John Lewis and Partners** Present in all 11 categories	4.9%
06	**PriceRunner** Present in all 11 categories	4.8%

The giants are everywhere

These six take the biggest share of organic shopping visibility, and every one appears in all 11 categories.

6

Overall share of visibility. PriceRunner is a price comparison site; aggregators are excluded from the Part 2 rankings. Source: Re:signal analysis of Productrise data. 5,000 UK search terms, August 2026.

The specialists

Specialists win at home

The Perfume Shop's share of visibility



Nearly seven times its overall weight. Depth of range and expertise beat the generalists in their own category.

Seller	Overall	Category	In category	Uplift
The Perfume Shop	**1.2%**	**Fragrance**	**8.2%**	**6.8×**
Fragrance Revolution Boutique	0.7%	Fragrance	4.8%	6.9×
The Fragrance Shop	0.4%	Fragrance	2.9%	7.3×
M&S	0.4%	Beauty accessories	3.0%	7.5×
Accessorize	0.7%	Hair	2.6%	3.7×

Uplift is category share divided by overall share. Source: Re:signal analysis of Productrise data. 5,000 UK search terms, August 2026.



FATFACE

Fashion retail, UK, Ireland & US

+96%
Organic revenue

+90%
eCommerce conversion rate

+29%
Organic traffic

Case study

Growing FatFace revenue 96% through a key category.

OBJECTIVE

Drive more organic visitors and revenue to one category: **Women's jeans**. We knew would need a comprehensive and innovative content strategy.

WHAT WE DID

A link audit and disavow, keyword research across the category, optimised content and metadata, clear internal linking, and guides such as The Ultimate Denim Fit Guide. **Keywords the category ranks for doubled.**

WINNER OF 3 AWARDS:

EUROPEAN SEARCH AWARDS

GLOBAL SEARCH AWARDS

UK SEARCH AWARDS

Re:signal

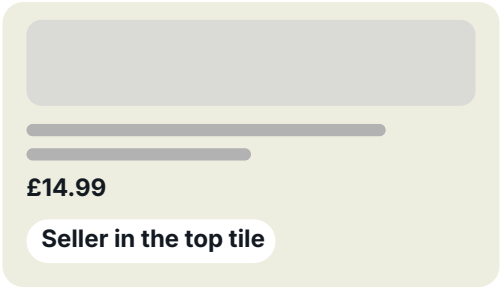
03

What changes once ChatGPT enters the picture

300 real UK buying prompts, the same 11 categories, 9 days of live data.

Three ways to measure visibility

A merchant is not a brand



Organic shopping grid

The seller shown in Google's organic shopping tile. Measured with Productrise.



ChatGPT merchant

Who sells the product inside a ChatGPT answer. Who gets the sale. Measured with Peec.ai.



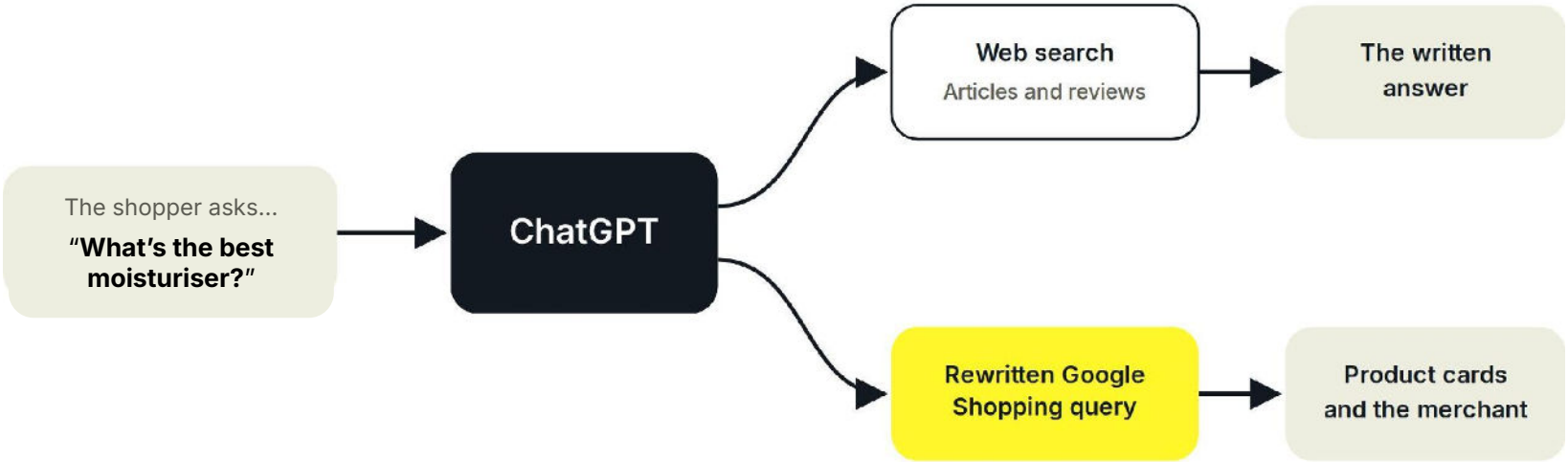
ChatGPT brand

Whose product is recommended, whoever sells it. Only revenue when the brand is also the merchant.

Re:signal

How ChatGPT shops

One question, two searches



The shopping query decides which product cards appear and who gets the sale.

That's where your product data counts.

The rewrite

ChatGPT adds brands the shopper never typed



"What's the best moisturiser?" became an 11-word shopping search naming CeraVe, La Roche-Posay and Eucerin.



The evidence

Most product cards don't come from merchant feeds

The other ~75% are built from ChatGPT's own search index and Google's commercial signals.

- Live, direct merchant feeds
- ChatGPT's index and Google's commercial signals

Profound analysed 200,000+ ChatGPT shopping prompts and ~812,000 product cards. "Breaking down how ChatGPT Shopping works", July 2026.

Google vs ChatGPT

Related, but not the same

=

Similar

ChatGPT queries Google Shopping, so feed quality matters on both. The same retailer wins both 43.1% of the time.

≠

Different

ChatGPT uses a wider set of signals. Google winners can miss out in ChatGPT, and the reverse.

?

Probabilistic

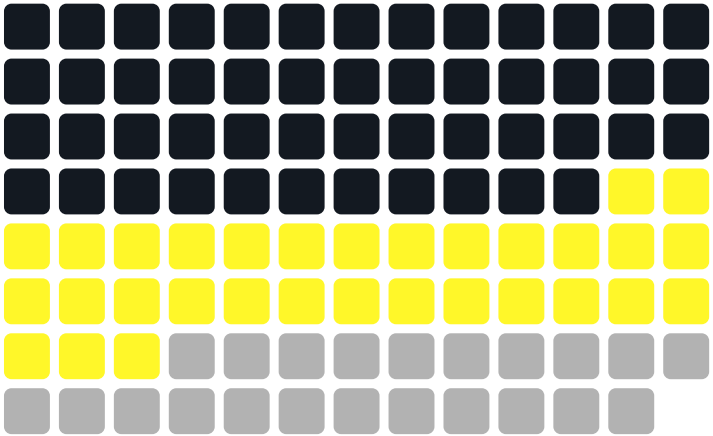
Every recommendation is a roll of the dice, but you can weight it. Boots and Amazon have, through feed quality, pricing and coverage.

Who owns organic

Two retailers own the top spot

Amazon and Boots hold the top organic position in 79% of 103 subcategories, from facial sunscreen to detangling brushes.

- Amazon: 50 subcategories
- Boots: 31 subcategories
- Everyone else: 22 subcategories



Each square is one of 103 matched subcategories, coloured by its #1 organic seller.

Source: Re:signal analysis of Productrise data. 5,000 UK search terms, August 2026.

Presence is not winning

ChatGPT hardens the hierarchy

13
subcategories won organically outside the big four

→

3
also won in ChatGPT: a 23% carry-through

The three: Holland & Barrett for hair vitamins, Argos for intimate grooming, and M&S for socks and tights.

Who wins the #1 organic spot

01	**Amazon** Present in 103 · 48.5% win rate	50 wins
02	**Boots** Present in 103 · 30.1% win rate	31 wins
03	**John Lewis & Partners** Present in 92 · 5.4% win rate	5 wins
04	**Superdrug** Present in 102 · 2.9% win rate	3 wins
05	**Lookfantastic** Present in 87 · 1.1% win rate	1 win

Across 103 matched subcategories. Source: Re:signal analysis of Productrise data. 5,000 UK search terms, August 2026.

Re:signal

When they disagree

Winning Google is a weighted coin flip

43.1%

Same winner on Google and ChatGPT

56.9%

ChatGPT picks a different retailer, most often Amazon

Share of 102 matched subcategories. Sources: Productrise (August 2026) and Peec.ai (6 to 14 August 2026), Re:signal analysis.

ChatGPT draws on a wider shopping pool and picks its own top offer. Amazon's breadth of listings benefits more from that pool than from Google's rankings.

Where they split

Eight subcategories, two different winners

Subcategory	Google organic winner	Organic share	ChatGPT winner	ChatGPT share
Face rollers / gua sha	Amazon	28.9%	Beautylish	13.3%
Hair extensions	Amazon	27.1%	Cliphair	26.1%
Tools	Amazon	26.8%	Lookfantastic	13.8%
Eyes	Amazon	20.9%	Boots	14.5%
Suncare, other	Boots	20.0%	Amazon	33.0%
Exfoliating / scrub	Amazon	19.9%	Lookfantastic	20.2%
Makeup gift sets	Amazon	17.5%	Charlotte Tilbury	23.9%
Palettes	Amazon	17.3%	Boots	15.9%

Sources: Productrise (Google, August 2026) and Peec.ai (ChatGPT, 6 to 14 August 2026), Re:signal analysis.

Brands selling direct

94

brands sell direct in ChatGPT with no matching presence in Google's organic product tiles.

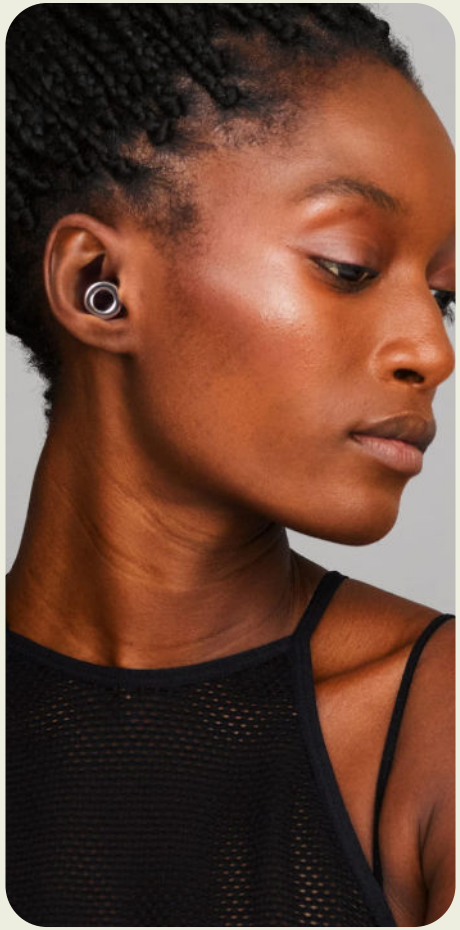
The opposite of what we expected. A stronger Google feed is upside these brands are leaving on the table.

Eight examples. Organic tile presence for all eight: none found.

Subcategory	Brand selling direct	ChatGPT merchant share
Sunscreen stick	Beauty of Joseon	11.7%
Styling tools	GHD Hair	9.5%
Dry shampoo	Living Proof	8.6%
Fragrance, other	YSL Beauty	5.7%
Fragrance, other	Chanel	4.3%
Cheeks	NARS Cosmetics	3.2%
Cheeks	YSL Beauty	3.2%
Eyelash curlers	Charlotte Tilbury	1.8%

Source: Re:signal analysis of Peec.ai data. 300 UK buying prompts in ChatGPT, 6 to 14 August 2026.

Re:signal



loop

Direct-to-consumer, Global

+990%

Organic revenue

28.6%

of total Organic revenue vs 20% target

+340%

Organic traffic YoY vs a 3× target

Case study

Helping Loop smash targets with a 990% revenue increase.

OBJECTIVE

We looked at the opportunities available and set the following targets: Grow organic traffic 3× and make Organic 20% of total revenue.

WHAT WE DID

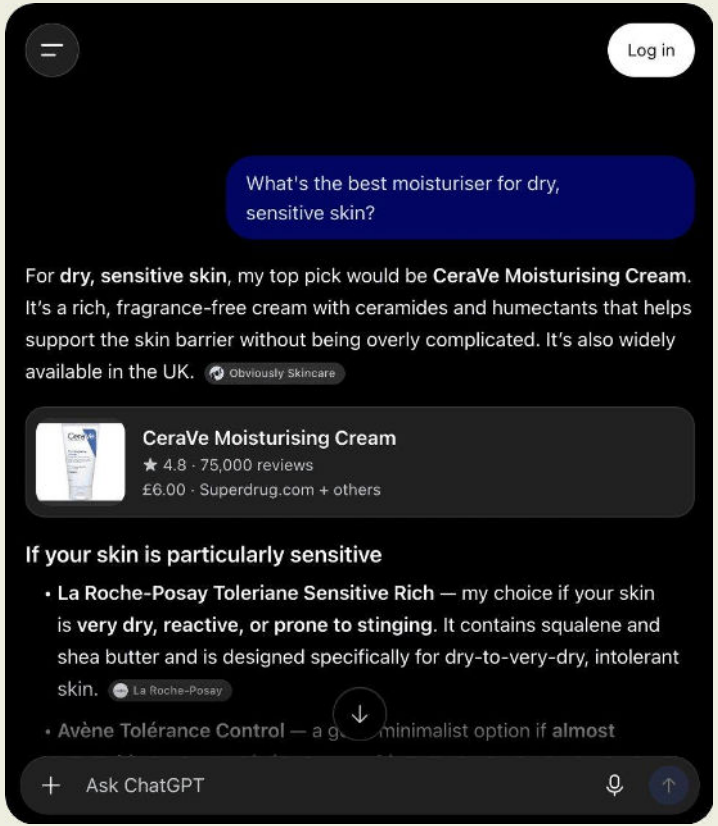
Fixed canonicalisation sitewide, reworked internal linking towards the highest-earning pages, refreshed underperforming content and filled content gaps, backed by a technical and link audit.

WINNER OF 3 AWARDS:

EUROPEAN SEARCH AWARDS

GLOBAL SEARCH AWARDS

UK SEARCH AWARDS



Recommended is not paid

ChatGPT says your name. Someone else gets paid.

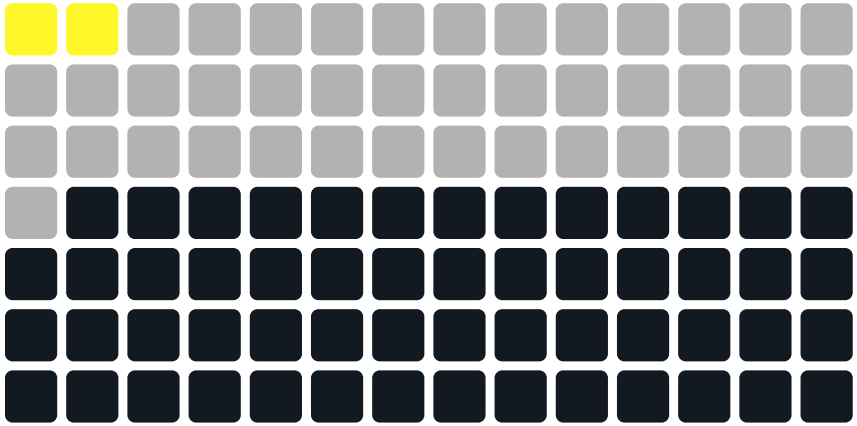
1. ChatGPT recommends **CeraVe** as its top pick for dry, sensitive skin.
2. The buy card sends shoppers to **Superdrug**.
3. CeraVe gets the mention. Superdrug gets the revenue.

Re:signal

Only 2 in 100

Where the sale goes for ChatGPT's 98 top-recommended brands

- **2** win the recommendation and the sale
- **41** (41.8%) appear as a merchant, but never first
- **55** (56.1%) don't appear as a merchant at all



Each square is one brand that ChatGPT recommends first in a subcategory.
Source: Re:signal analysis of Peec.ai data.
300 UK buying prompts in ChatGPT, 6 to 14 August 2026.

Re:signal

Most recommended

01	**Charlotte Tilbury** Makeup gift sets · also the #1 merchant	150
02	**Essie** Nails · not a merchant	106
03	**Oral-B** Oral care, other · not a merchant	86
04	**Always** Sanitary pads · not a merchant	80
05	**CeraVe** Skin type · not a merchant	51

Top of the recommendations, missing from the sale

Brand mentions as ChatGPT's #1 recommended brand. Four of the five never appear as the merchant.

5

Source: Re:signal analysis of Peec.ai data. 300 UK buying prompts in ChatGPT, 6 to 14 August 2026.

Re:signal

Recommended vs paid

The two brands that win both

Subcategory	ChatGPT's #1 recommended brand	Brand mentions	Also #1 merchant?	Merchant at all?
Makeup gift sets	**Charlotte Tilbury**	**150**	**Yes**	**Yes, rank 1**
Expert skincare	**La Roche-Posay**	**31**	**Yes**	**Yes, rank 1**
Nails	Essie	106	No	No
Oral care, other	Oral-B	86	No	No
Sanitary pads	Always	80	No	No
Skin type	CeraVe	51	No	No
Mouthwash	Colgate	33	No	No
Soap	Dove	25	No	No

Source: Re:signal analysis of Peec.ai data. 300 UK buying prompts in ChatGPT, 6 to 14 August 2026.

Brand spotlights

Mentioned, but rarely the merchant

Moroccanoil

449 : 2

brand mentions : times it was the merchant

The most recommended haircare brand. Buyers are probably completing their purchase on Amazon.

The Ordinary

206 : 22

brand mentions : times it was the merchant

A strong following, with room to capture far more of the demand it creates.

Charlotte Tilbury

Rank 1

recommended brand and merchant

The exception. ChatGPT routes buyers straight to its own site, not to Boots or Superdrug.

What this means

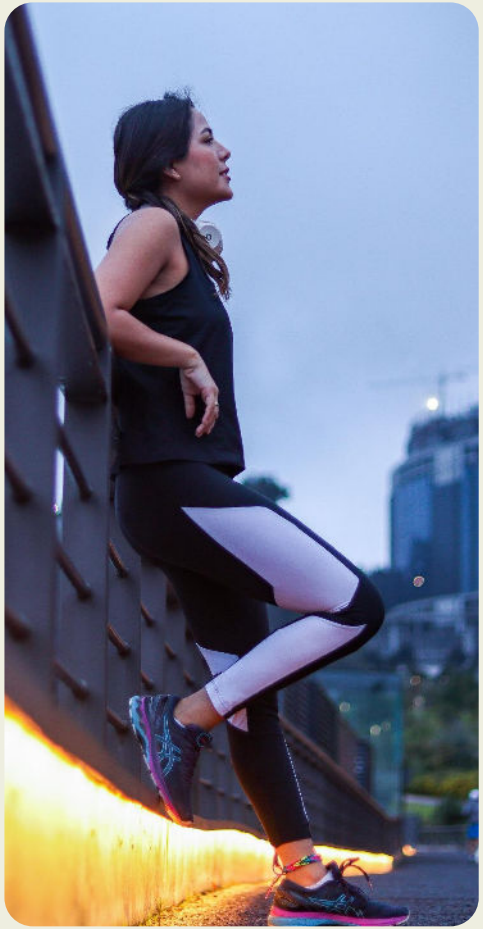
Visibility without merchant presence funds your retailers

The conversion benefit accrues to Boots or Amazon, not the brand's own revenue line.

The exception to the rule

For brands that sell mainly through retailers, a direct merchant path may not be viable.

Then the priority shifts: give retail partners the best possible product data and pricing.



asics

Sportswear, 14 European markets

94%

increase in Organic revenue, YOY

11×

average annual ROI over 6 years

2.7×

organic revenue growth over 6 years

Case study

Lacing up ASICS for 8 years growth.

OBJECTIVE

ASICS set out to win more category demand across 26 sites, reduce reliance on third-party retailers, and protect visibility as search behaviour changed.

WHAT WE DID

1,650 pieces of content across 10 languages since 2018, delivered by one consistent team. **Winner of 9 Search awards:**

EUROPEAN SEARCH AWARDS

GLOBAL SEARCH AWARDS

UK SEARCH AWARDS

"We were consistently missing our targets on organic revenue growth. With 26 websites in 8 different languages, we just didn't have the in-house expert SEO knowledge that we needed."

Andrew Longley, Senior E-Comm Manager

The outliers

Cult brands win ChatGPT on reputation alone

01

No single pattern

Across the 94 brands winning in ChatGPT without Google tile presence, no universal pattern explains them all.

02

One shared trait

Cult-following products with lots of online discussion: Lancôme, The Ordinary, YSL Beauty, La Roche-Posay, Chanel and niche suncare brands.

03

Skipping the feed

With strong enough off-site signals, ChatGPT sometimes bypasses the shopping feed and pulls product data from the brand's own site.

The haircare opportunity

831 : 4

Moroccanoil and Olaplex: recommended 831 times by ChatGPT vs the seller 4 times.

Household names, so it isn't awareness. Product data and merchant setup are the likely causes, and both can be fixed.



> “For me, the opportunity is to understand not just where the final transaction happens, but how digital discovery across search, content, social, retailers and increasingly AI contributes to that conversion journey.”

Sara-Lou Roberts, eCommerce Director, Haircare, The Estée Lauder Companies

Re:signal



VIVOBAREFOOT

£2.76m

added organic revenue, +68% YoY

146%

of the organic revenue target

+75%

organic sessions, yoY

Case study

£2.76m added Organic revenue in 6 months for Vivobarefoot.

Objective

Grow organic traffic and revenue 15% YoY in 6 months. We needed to develop a comprehensive strategy designed to attract awareness, consideration and conversion traffic.

WHAT WE DID

Aligned paid and organic search, built out the category page structure, and restructured product pages with better metadata, headings and internal linking.

> "It's been a really good partnership with Re:signal, and it has been a good learning process for both of us."
>
> Ana Patricia Medina Castillo, Ecomm Manager

Re:signal

04

One fix, two shelves

You don't need a separate strategy for Google and ChatGPT.

The fix

Fix product data once. Win on both shelves.

Your product data

Feed, structured data and site, telling one consistent story

→

Shelf one: Google

The organic shopping tile

→

Shelf two: ChatGPT

The product card and merchant

Re:signal

In this order

Three steps

Nothing you shouldn't already be doing for product data hygiene. It takes doing it properly.

1

Optimise your Google Shopping feed

Accurate, complete, well-structured product data.

2

Mark up on-site content

So ChatGPT can retrieve and understand it correctly.

3

Audit your visibility in ChatGPT

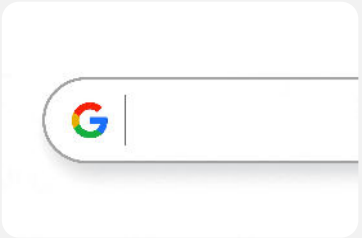
As a brand and as a merchant, not just in traditional search.

Re:signal

Organic search has evolved to a multi-platform experience

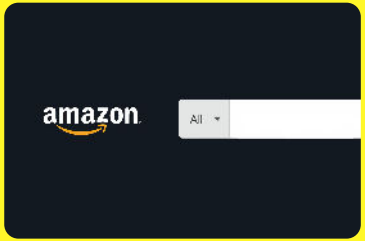
Traditional Search

Drive measurable revenue through organic search strategy, technical SEO, content production and digital PR that prioritise commercial value over vanity metrics.



Retail Search

Turn retail listings into predictable sales with optimised product data, structured content, present across retail search platforms including Google Shopping and Amazon.



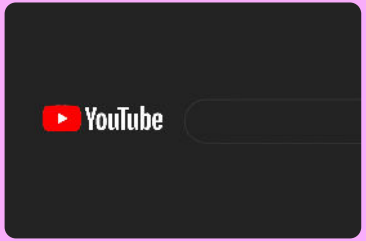
AI Search

Stay visible as search evolves. Prepare your content, data and authority for AI-driven discovery, LLMs / answer engines, as we enter a world of agentic commerce.



Social Search

Reach audiences where they discover and decide through content designed to convert engagement into demand, brand awareness and measurable growth.



The same broken product data costs a seller the sale twice: once on the shopping tile Google shows, and once on the shelf ChatGPT invents.

"Over the next year, the priority shouldn't be 'how do we rank in AI?' but rather 'how do we make our brand the most relevant answer?'. The brands that connect product data, content, brand authority and commerce will be the ones best placed to turn AI recommendation into commercial value – be that for market cut through or those all important sales."

Sara-Lou Roberts, eCommerce Director, Estée Lauder

ESTĒE LAUDER COMPANIES

What this means for you

Three positions, three priorities

01

Brands selling direct

Fix merchant presence so ChatGPT's recommendations convert on your site. Charlotte Tilbury shows it can be done.

02

Brands selling through retailers

Give retail partners the best product data and pricing. Their feed is your shelf.

03

Retailers

Only 23% of specialist wins on Google carry through to ChatGPT. Measure both shelves.



The author's view

“Most beauty brands are still optimising for one shelf. This data shows there are now two: the shopping grid Google shows, and the one ChatGPT builds for every question. The brands that win both aren’t doing anything exotic. They’re getting their product data right once, and letting it work everywhere.”

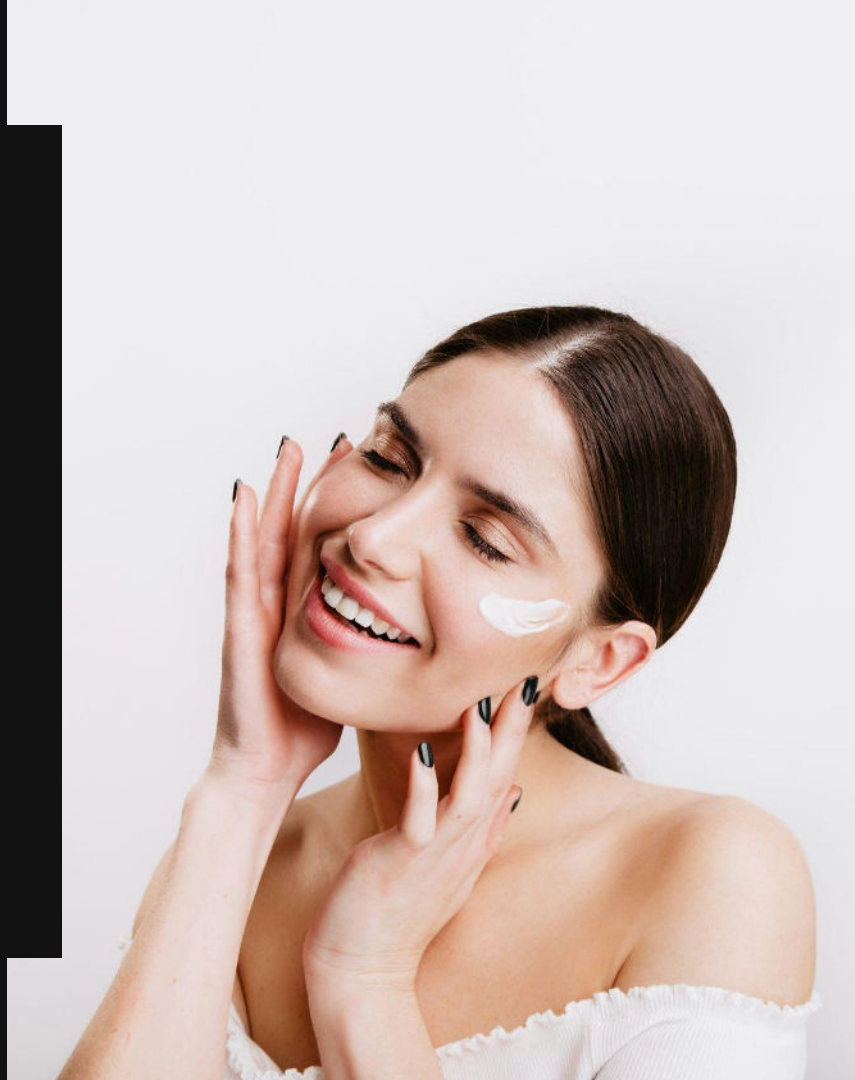
Callum Lockwood

Director of Organic Search

Conclusion

Google & ChatGPT share one foundation: strong product data. Winning one doesn't mean winning the other.

With visibility this fragmented, smaller and niche brands have a real opening, especially in haircare.



05

About Re:signal

Re:signal

15 years of turning search into sustainable growth.

£100m+

Organic Search revenue managed in 2025

71%

Average YoY growth

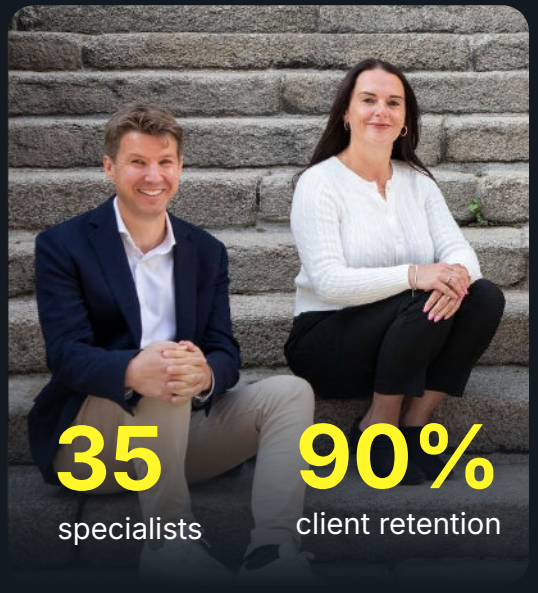


100

Industry awards won, inc 90 Search Awards

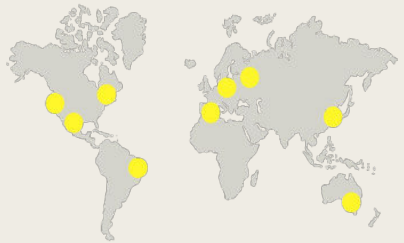
EUROPEAN SEARCH AWARDS

GLOBAL SEARCH AWARDS



35 specialists

90% client retention



18 countries

4 continents

Campaigns across 10 languages

Certified B Corporation

Award winning. Result-driven.

For 15 years we've been the industry leader in Search for trusted partners & ambitious brands.

Who we help Organically grow.

















Win where it matters, together.

Winner of 100 Awards

(the most awarded specialist SEO agency)



EUROPEAN SEARCH AWARDS

GLOBAL SEARCH AWARDS

US SEARCH AWARDS

Talk to us

Find out who's taking your sales in ChatGPT



Our AI Discoverability Audit shows where your brand is recommended, where the sale goes, and what to fix.

- ✓ AI visibility benchmarked against competitors
- ✓ Live retrieval tests on your product and category pages
- ✓ A prioritised fix list for feed, structured data and site

Oliver Conlon
Growth Director
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Book a scoping call

06

Sources & Caveats

Methodology

Google organic shopping data

Source

Productrise, run against Re:signal's own 5,000-keyword UK beauty and personal care set covering all 11 categories. Snapshot taken August 2026.

Share of voice

Supplied per seller at keyword level, based on listings shown and grid position. Category and overall figures are search volume-weighted averages.

Sellers

937 sellers are named. The rest are grouped as Others: 0.8% to 5.7% of visibility by category. An earlier top-50 pass buried specialists in an Others bucket as high as 55%; this report uses the fuller dataset.

Exclusions

460 keywords (9.2%) returned no listings: excluded from share of voice, included in coverage. Amazon, Amazon.co.uk and Amazon Marketplace are reported separately.

Methodology

ChatGPT Data & Caveats

Source

Peec.ai, tracking 300 real UK buying prompts across the same categories, in ChatGPT only. 6 to 14 August 2026: the first 9 full days of tracking.

Metrics we didn't use

Peec's Visibility score doesn't reliably reflect relevance. Its Sentiment score skews positive by design, since ChatGPT rarely recommends products it views negatively.

Matching

Organic subcategories were matched to Peec's 103 tags. Razors and blades was excluded, leaving 102, because Google's results were led by Razer.com, a gaming brand. Price comparison sites are excluded from Part 2 rankings.

Reading "absent" claims

One-mention brands are grouped into a long tail, so "not a merchant" means not identifiable individually in this dataset.

Cite as: Re:signal (2026). Beauty & Personal Care Product Discovery Report.
resignal.com/beauty-personal-care-product-discovery-report-v2

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