Who AI Recommends: Makeup

How ChatGPT, Gemini and Google AI Overviews rank 58 makeup brands on ten buying questions, and what it takes to be the brand they recommend first.

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ENGINES
ChatGPT · Gemini · Google AI Overviews
United States · October 2026

PLEASE READ FIRST

Important notice and disclaimer

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AT A GLANCE

The makeup category in numbers

30
AI answers analyzed
10 buying questions × 3 engines

58
makeup brands named
by at least one engine

9
different brands win the ten questions
only Charlotte Tilbury wins twice

2 of 10
questions on which all three engines agree
on the #1 brand

67%
of answers mention e.l.f.
the most of any brand

5 of 6
questions where Estée Lauder is missing
yet it wins foundation

ABOUT THIS REPORT

This report is part of the Answer Engine Daily AEO Index. Every month we ask ChatGPT, Gemini and Google AI Overviews the same buying questions and record which brands they recommend, the order they put them in, and the sources they cite. This edition covers makeup. Its ten questions run from foundation and mascara through to tinted moisturizer.

None of the questions names a brand, so every brand starts on equal terms.

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EXECUTIVE SUMMARY

Nine brands win AI's makeup questions, and the most visible rarely comes first

Makeup belongs to specialists. Nine brands share the ten #1 spots, with Charlotte Tilbury the only one to win twice. e.l.f. is named in 67% of answers, far more than anyone else, but ranks first in only 10%. Of everything the engines cite, 94.5% comes from someone other than the brand.

KEY FINDINGS

1 **Charlotte Tilbury leads, but only just.**

Charlotte Tilbury has the top AI Rank Score, 25.3, and more first places than any rival, with 6 of 30 answers. It wins lipstick, where all three engines agree, as well as setting spray. NARS (24.0) is close behind, e.l.f. (19.7) is third and Anastasia Beverly Hills fourth at 17.3.

2 **e.l.f. is seen widely, first rarely.**

e.l.f. appears in 67% of answers, including 80% of Gemini's and 80% of Google AI Overviews'. It ranks first in only 10%. Maybelline's problem is sharper still: named in 43% of answers and first in none. Further down the list, a mention is worth much less.

3 **Specialists take their own products.**

The ten #1 spots go to nine brands. Natasha Denona wins eyeshadow palettes, Anastasia Beverly Hills brows, Rare Beauty blush and Laura Mercier tinted moisturizer. Outside that one product, most of these winners score little.

4 **The engines seldom agree.**

Only on lipstick and brows, 2 of the 10 questions, do ChatGPT, Gemini and Google AI Overviews pick the same top brand. For mascara each engine names a different #1. A lead on one engine says little about your position on the others.

5 **Beauty editors and retailers feed AI's makeup answers.**

Someone other than the brand owns 94.5% of the 183 sources cited. Google Shopping cards (24), Who What Wear (20), Ulta (15) and Allure (12) lead the list, and Shopping cards alone are 34.8% of AI Overviews' citations. Brand websites supply 5.5%.

6 **Several big names are absent.**

Estée Lauder wins foundation yet is missing from 5 of the 6 questions where it competes. NYX and Fenty Beauty are each absent from 4 questions, MAC from 3. Six major brands go unmentioned on mascara.

1 · THE MAKEUP LEADERBOARD

Charlotte Tilbury tops the makeup index, just ahead of NARS

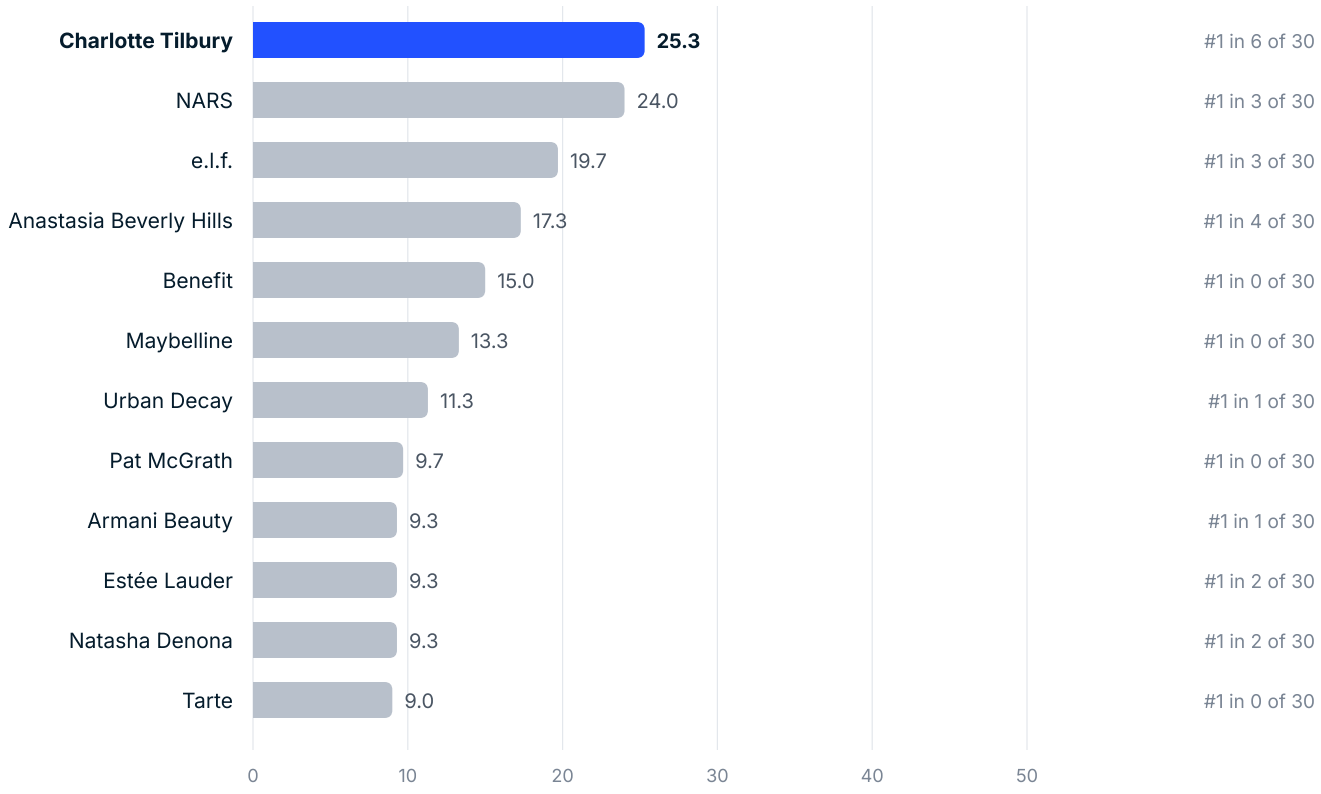
The AI Rank Score tracks how high each engine places a brand in its recommendations across the ten questions. A brand would score 100 only if all three engines named it first on every question. In makeup, each question covers a separate product, from foundation to eyebrow products, with its own specialists. The top score is just 25.3.

Two wins (lipstick and setting spray) and the most first places put Charlotte Tilbury ahead. NARS wins nothing outright but ranks high on concealer, blush and tinted moisturizer. e.l.f. wins primer and is named on every question except mascara. Below Anastasia Beverly Hills in fourth, no brand scores above 15.

Exhibit 1

Charlotte Tilbury has the top AI Rank Score, and NARS is a close second.

AI Rank Score, makeup category, top 12 brands (0–100)



Figures on the right show how many of the 30 answers rank the brand #1.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

e.l.f. is the most visible makeup brand, yet rarely ranked first

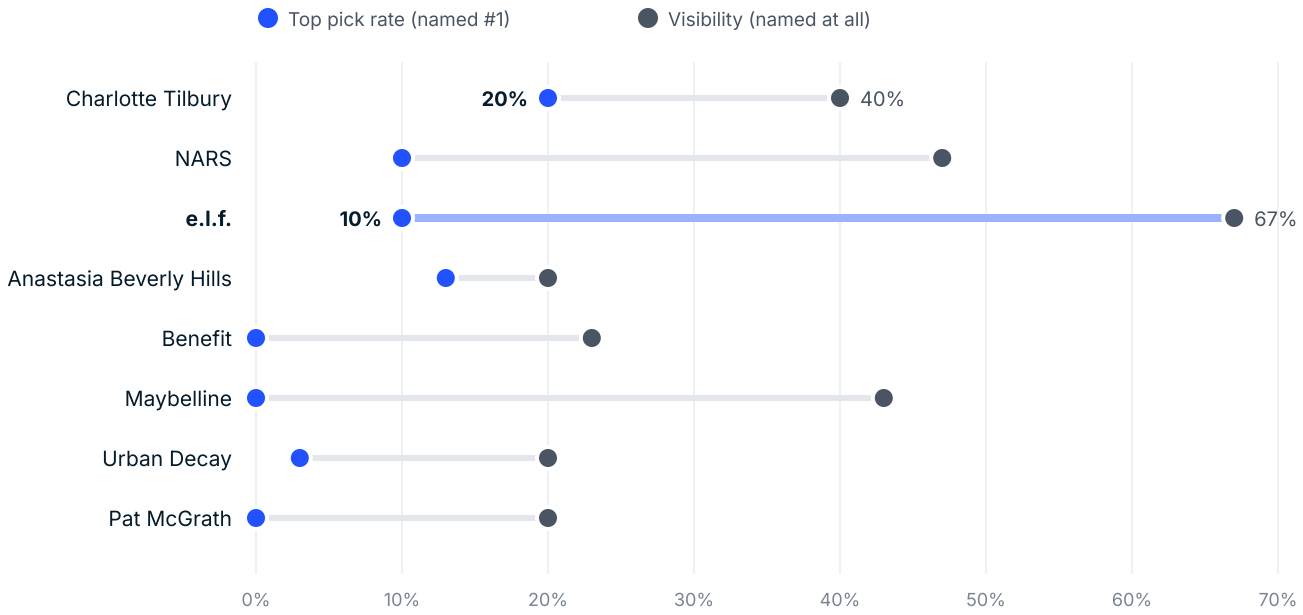
Visibility measures how often engines name a brand at all, and the top pick rate how often they name it first. Comparing the two shows whether an engine sees a brand as the answer or as one more option on the list.

No brand's gap is wider than e.l.f.'s. It is named in 67% of answers and ranked first in 10%, three answers in all. Maybelline is named in 43% and never first. Charlotte Tilbury appears in 40% of answers and is first in 20%. For a CMO, the top pick rate is the figure to follow.

Exhibit 2

e.l.f. appears in two thirds of answers and is ranked first in one in ten.

Visibility and top pick rate, % of 30 AI answers, top 8 brands



Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

Why first place matters

An AI answer is a short list. People asking for "the best foundation brands" mostly read the first name or two and go no further. Brands in fourth or fifth place get seen. They rarely get bought.

2 · WINNERS AND LOSERS, QUESTION BY QUESTION

In makeup, nine brands share the ten #1 spots

Taken one question at a time, makeup is a market of specialists, and a win on one product says little about the next. Natasha Denona wins eyeshadow palettes while appearing in only 10% of all makeup answers. Laura Mercier wins tinted moisturizer and misses the overall top 15.

Exhibit 3

Each product has its specialist, and no brand wins more than two.

AI Rank Score by question (0–100), top 8 brands; bold = question winner; – = not named by any engine

	Foun-dation	Mascara	Concealer	Lipstick	Eye-shadow	Setting spray	Blush	Brows	Primer	Tinted moist.
Charlotte Tilbury	3	33	3	**100**	13	**93**	–	3	3	–
NARS	27	–	77	33	–	–	47	–	–	57
e.l.f.	7	–	47	3	7	27	7	17	**70**	13
Anastasia Beverly Hills	–	–	–	–	73	–	–	**100**	–	–
Benefit	–	30	–	–	–	–	–	80	40	–
Maybelline	33	27	23	23	–	–	–	13	10	3
Urban Decay	–	–	3	–	23	87	–	–	–	–
Pat McGrath	–	–	3	30	37	–	27	–	–	–

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

What this means for brands

Choose the products where you really are the best option, and build coverage around those. Here a focused brand can own a question; Natasha Denona wins eyeshadow palettes with 10% overall visibility. Broad brands need to check each product for gaps. Estée Lauder wins foundation and is missing from five other questions.

Exhibit 4

Winners and losers on every makeup question.

Winner and runner-up by AI Rank Score

#	QUESTION	WINNER (SCORE)	RUNNER-UP	DETAIL
1	Best foundation brands	**Estée Lauder** 93	Armani Beauty 50	p. 9
2	Best mascara brands	**Lancôme** 60	YSL 57	p. 10
3	Best concealer brands	**Tarte** 80	NARS 77	p. 11
4	Best lipstick brands	**Charlotte Tilbury** 100	Dior 37	p. 12
5	Best eyeshadow palette brands	**Natasha Denona** 93	Anastasia Beverly Hills 73	p. 13
6	Best setting spray brands	**Charlotte Tilbury** 93	Urban Decay 87	p. 14
7	Best blush brands	**Rare Beauty** 70	Saie 50	p. 15
8	Best eyebrow product brands	**Anastasia Beverly Hills** 100	Benefit 80	p. 16
9	Best makeup primer brands	**e.l.f.** 70	Milk Makeup 60	p. 17
10	Best tinted moisturizer brands	**Laura Mercier** 73	bareMinerals 70	p. 18

Each question has its own page with the full list of brands, engine positions and sources (see the Detail column).

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

QUOTE IT

#1 in AI answers for "Best lipstick brands": Charlotte Tilbury (AI Rank Score 100/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

Results apply to October 2026 only and are subject to the Important notice and disclaimer on the last page.

2 · QUESTION 1 OF 10

"Best foundation brands"

Estée Lauder is the clear AI pick for foundation

17	93	2 of 3	22
brands named across the three answers	AI Rank Score for Estée Lauder	engines agree on the #1 brand	sources cited, none from brand sites

Estée Lauder scores 93. Two of the three engines rank it first. Gemini puts it at #2 and picks Armani Beauty instead. Armani Beauty is a distant second at 50. The field is wide open: 17 brands are named and the top three take only 32% of mentions.

Exhibit 4.1

Estée Lauder scores 93, out of 17 brands named.

AI Rank Score and engine positions, top 10 brands for "Best foundation brands"

#	BRAND	AI RANK SCORE	CHATGPT	GEMINI	AI OVERVIEWS	SHARE OF VOICE	RECOM-MENDED	#1 PICK
1	Estée Lauder	93	**#1**	#2	**#1**	9.9%	3/3	2/3
2	Armani Beauty	50	#6	**#1**	#4	11.3%	3/3	1/3
3	Fenty Beauty	47	–	#3	#2	11.3%	2/3	0/3
4	Maybelline	33	#2	#9	#6	12.7%	3/3	0/3
5	Haus Labs	33	–	#4	#3	11.3%	2/3	0/3
6	L'Oréal	27	#3	#8	#7	9.9%	3/3	0/3
7	NARS	27	#4	#6	#5	8.5%	3/3	0/3
8	Ilia	10	–	#5	–	4.2%	1/3	0/3
9	MAC	10	#5	–	–	1.4%	1/3	0/3
10	e.l.f.	7	–	#10	#8	7.0%	2/3	0/3

7 more brands named with lower scores. Engine columns show the brand's position in each answer (– = not named). Share of voice = share of all brand mentions in the three answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

SOURCES BEHIND THESE ANSWERS

ulta.com	1	2
Google Shopping cards		3
whowhatwear.com	2	
allure.com		1

Plus 13 more sites.

WHO IS MISSING

NAMED BY ONLY 1 ENGINE MAC and Charlotte Tilbury

QUOTE IT. #1 in AI answers for "Best foundation brands": Estée Lauder (AI Rank Score 93/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

2 · QUESTION 2 OF 10

"Best mascara brands"

Lancôme edges out YSL for mascara

17	60	None	14
brands named across the three answers	AI Rank Score for Lancôme	engines agree on the #1 brand	sources cited, none from brand sites

Lancôme scores 60, although only Gemini ranks it first. YSL is close behind at 57, so this question could change hands next month. Each engine picks a different #1: ChatGPT chooses YSL, Gemini Lancôme and Google AI Overviews Charlotte Tilbury. The field is wide open: 17 brands are named and the top three take only 33% of mentions.

Exhibit 4.2

Lancôme scores 60, out of 17 brands named.

AI Rank Score and engine positions, top 10 brands for "Best mascara brands"

#	BRAND	AI RANK SCORE	CHATGPT	GEMINI	AI OVERVIEWS	SHARE OF VOICE	RECOM-MENDED	#1 PICK
1	Lancôme	60	#4	**#1**	#4	10.9%	3/3	1/3
2	YSL	57	**#1**	#14	#3	15.2%	3/3	1/3
3	Too Faced	47	–	#3	#2	6.5%	2/3	0/3
4	Essence	33	#2	#6	#9	6.5%	3/3	0/3
5	Charlotte Tilbury	33	–	–	**#1**	2.2%	1/3	1/3
6	Benefit	30	#8	#2	–	4.3%	2/3	0/3
7	Maybelline	27	#5	#4	#8	13.0%	3/3	0/3
8	CoverGirl	20	#3	–	–	2.2%	1/3	0/3
9	Ilia	17	#7	#10	#5	10.9%	3/3	0/3
10	L'Oréal	13	–	#5	#10	6.5%	2/3	0/3

7 more brands named with lower scores. Engine columns show the brand's position in each answer (– = not named). Share of voice = share of all brand mentions in the three answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

SOURCES BEHIND THESE ANSWERS

Google Shopping cards	2
womanandhome.com	2
allure.com	1
amazon.com	1

Plus 8 more sites.

WHO IS MISSING

NAMED BY ONLY 1 ENGINE Charlotte Tilbury and Rare Beauty

QUOTE IT. #1 in AI answers for "Best mascara brands": Lancôme (AI Rank Score 60/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

2 · QUESTION 3 OF 10

"Best concealer brands"

Tarte edges out NARS for concealer

17	80	2 of 3	13
brands named across the three answers	AI Rank Score for Tarte	engines agree on the #1 brand	sources cited, none from brand sites

Tarte scores 80 without a single first place. It wins by ranking high on every engine. NARS is close behind at 77, so this question could change hands next month. ChatGPT and Gemini put NARS first, while Google AI Overviews goes with e.l.f.. In total 17 brands are named, and the top three take 43% of all brand mentions.

Exhibit 4.3

Tarte scores 80, out of 17 brands named.

AI Rank Score and engine positions, top 10 brands for "Best concealer brands"

#	BRAND	AI RANK SCORE	CHATGPT	GEMINI	AI OVERVIEWS	SHARE OF VOICE	RECOM-MENDED	#1 PICK
1	Tarte	80	#2	#2	#2	16.3%	3/3	0/3
2	NARS	77	**#1**	**#1**	#5	14.3%	3/3	2/3
3	e.l.f.	47	#5	#10	**#1**	12.2%	3/3	1/3
4	Tower 28	30	–	#5	#3	8.2%	2/3	0/3
5	Maybelline	23	#3	#8	–	6.1%	2/3	0/3
6	Kosas	20	#4	#6	#7	8.2%	2/3	0/3
7	Hourglass	20	–	#3	–	2.0%	1/3	0/3
8	Armani Beauty	17	#6	–	#4	6.1%	2/3	0/3
9	Dior	13	–	#4	–	6.1%	1/3	0/3
10	Bobbi Brown	3	#11	–	–	2.0%	0/3	0/3

7 more brands named with lower scores. Engine columns show the brand's position in each answer (– = not named). Share of voice = share of all brand mentions in the three answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

SOURCES BEHIND THESE ANSWERS

allure.com	2	1
byrdie.com		1
glamour.com	1	
Google Shopping cards		1

Plus 7 more sites.

WHO IS MISSING

NAMED BY ONLY 1 ENGINE Charlotte Tilbury, Rare Beauty and NYX

QUOTE IT. #1 in AI answers for "Best concealer brands": Tarte (AI Rank Score 80/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

2 · QUESTION 4 OF 10

"Best lipstick brands"

Charlotte Tilbury is the clear AI pick for lipstick

18	100	All 3	12
brands named across the three answers	AI Rank Score for Charlotte Tilbury	engines agree on the #1 brand	sources cited, none from brand sites

Charlotte Tilbury scores 100 and is the first pick on all three engines. Dior is a distant second at 37. The field is wide open: 18 brands are named and the top three take only 32% of mentions.

Exhibit 4.4

Charlotte Tilbury scores 100, out of 18 brands named.

AI Rank Score and engine positions, top 10 brands for "Best lipstick brands"

#	BRAND	AI RANK SCORE	CHATGPT	GEMINI	AI OVERVIEWS	SHARE OF VOICE	RECOM-MENDED	#1 PICK
1	Charlotte Tilbury	100	**#1**	**#1**	**#1**	9.2%	3/3	3/3
2	Dior	37	#7	#4	#3	16.9%	3/3	0/3
3	NARS	33	#4	#3	–	6.2%	2/3	0/3
4	MAC	30	#6	–	#2	6.2%	2/3	0/3
5	Pat McGrath	30	#9	#2	–	6.2%	2/3	0/3
6	Armani Beauty	27	#2	–	–	3.1%	1/3	0/3
7	Maybelline	23	#3	#7	–	6.2%	2/3	0/3
8	Revlon	20	#8	#8	#4	9.2%	3/3	0/3
9	Fenty Beauty	13	#5	#13	–	7.7%	2/3	0/3
10	Clinique	10	–	–	#5	1.5%	1/3	0/3

8 more brands named with lower scores. Engine columns show the brand's position in each answer (– = not named). Share of voice = share of all brand mentions in the three answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

SOURCES BEHIND THESE ANSWERS

whowhatwear.com	4	2
Google Shopping cards		2
amazon.com		1
instyle.com		1

Plus 2 more sites.

WHO IS MISSING

NAMED BY ONLY 1 ENGINE L'Oréal, Rare Beauty and e.l.f.

QUOTE IT. #1 in AI answers for "Best lipstick brands": Charlotte Tilbury (AI Rank Score 100/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

2 · QUESTION 5 OF 10

"Best eyeshadow palette brands"

Natasha Denona is the clear AI pick for eyeshadow palettes

11	93	2 of 3	23
brands named across the three answers	AI Rank Score for Natasha Denona	engines agree on the #1 brand	sources cited, 9 from brand sites

Natasha Denona scores 93. Two of the three engines rank it first. Google AI Overviews puts it at #2 and picks Anastasia Beverly Hills instead. Anastasia Beverly Hills is a distant second at 73. In total 11 brands are named, and the top three take 46% of all brand mentions.

Exhibit 4.5

Natasha Denona scores 93, out of 11 brands named.

AI Rank Score and engine positions, top 10 brands for "Best eyeshadow palette brands"

#	BRAND	AI RANK SCORE	CHATGPT	GEMINI	AI OVERVIEWS	SHARE OF VOICE	RECOM-MENDED	#1 PICK
1	Natasha Denona	93	**#1**	**#1**	#2	14.0%	3/3	2/3
2	Anastasia Beverly Hills	73	#3	#3	**#1**	15.8%	3/3	1/3
3	Colourpop	40	#2	#6	#5	15.8%	3/3	0/3
4	Pat McGrath	37	#5	#2	–	10.5%	2/3	0/3
5	Urban Decay	23	#4	#5	–	7.0%	2/3	0/3
6	Makeup by Mario	20	–	–	#3	3.5%	1/3	0/3
7	Charlotte Tilbury	13	–	–	#4	5.3%	1/3	0/3
8	Huda Beauty	13	–	#4	–	5.3%	1/3	0/3
9	e.l.f.	7	–	#8	#6	7.0%	1/3	0/3
10	Danessa Myricks	3	–	#9	–	8.8%	1/3	0/3

1 more brand named with lower scores. Engine columns show the brand's position in each answer (– = not named). Share of voice = share of all brand mentions in the three answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

SOURCES BEHIND THESE ANSWERS

Google Shopping cards		3
allure.com	1	1
ulta.com	2	
juviasplace.com		1

Plus 15 more sites.

WHO IS MISSING

NAMED BY ONLY 1 ENGINE Huda Beauty and Charlotte Tilbury

QUOTE IT. #1 in AI answers for "Best eyeshadow palette brands": Natasha Denona (AI Rank Score 93/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

2 · QUESTION 6 OF 10

"Best setting spray brands"

Charlotte Tilbury leads AI answers for setting spray, ahead of Urban Decay

13	93	2 of 3	19
brands named across the three answers	AI Rank Score for Charlotte Tilbury	engines agree on the #1 brand	sources cited, none from brand sites

Charlotte Tilbury scores 93. Two of the three engines rank it first. Gemini puts it at #2 and picks Urban Decay instead. Urban Decay is close behind at 87, so this question could change hands next month. In total 13 brands are named, and the top three take 47% of all brand mentions.

Exhibit 4.6

Charlotte Tilbury scores 93, out of 13 brands named.

AI Rank Score and engine positions, top 10 brands for "Best setting spray brands"

#	BRAND	AI RANK SCORE	CHATGPT	GEMINI	AI OVERVIEWS	SHARE OF VOICE	RECOM-MENDED	#1 PICK
1	Charlotte Tilbury	93	**#1**	#2	**#1**	17.8%	3/3	2/3
2	Urban Decay	87	#2	**#1**	#2	17.8%	3/3	1/3
3	ONE/SIZE	53	#3	#3	#4	11.1%	3/3	0/3
4	e.l.f.	27	#9	#8	#3	11.1%	3/3	0/3
5	MAC	17	#10	#4	–	11.1%	2/3	0/3
6	Morphe	13	#5	#9	–	4.4%	2/3	0/3
7	L'Oréal	13	#4	–	–	2.2%	1/3	0/3
8	Makeup by Mario	10	–	–	#5	2.2%	1/3	0/3
9	Milk Makeup	10	–	#5	–	4.4%	1/3	0/3
10	Milani	7	#6	#6	–	6.7%	2/3	0/3

3 more brands named with lower scores. Engine columns show the brand's position in each answer (– = not named). Share of voice = share of all brand mentions in the three answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

SOURCES BEHIND THESE ANSWERS

Google Shopping cards		3
allure.com	1	1
bronzeom.com	1	
byrdie.com		1

Plus 12 more sites.

WHO IS MISSING

NAMED BY ONLY 1 ENGINE NYX

QUOTE IT. #1 in AI answers for "Best setting spray brands": Charlotte Tilbury (AI Rank Score 93/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

2 · QUESTION 7 OF 10

"Best blush brands"

Rare Beauty is the clear AI pick for blush

18	70	2 of 3	16
brands named across the three answers	AI Rank Score for Rare Beauty	engines agree on the #1 brand	sources cited, none from brand sites

Rare Beauty scores 70. Two of the three engines rank it first. ChatGPT puts it at #7 and picks NARS instead. Saie is a distant second at 50. The field is wide open: 18 brands are named and the top three take only 31% of mentions.

Exhibit 4.7

Rare Beauty scores 70, out of 18 brands named.

AI Rank Score and engine positions, top 10 brands for "Best blush brands"

#	BRAND	AI RANK SCORE	CHATGPT	GEMINI	AI OVERVIEWS	SHARE OF VOICE	RECOM-MENDED	#1 PICK
1	Rare Beauty	70	#7	**#1**	**#1**	8.6%	3/3	2/3
2	Saie	50	#6	#2	#3	10.3%	3/3	0/3
3	NARS	47	**#1**	#6	#5	12.1%	3/3	1/3
4	Tower 28	30	–	#7	#2	6.9%	2/3	0/3
5	Patrick Ta	27	–	#4	#4	6.9%	2/3	0/3
6	Pat McGrath	27	#2	–	–	1.7%	1/3	0/3
7	Glossier	20	–	#3	–	8.6%	1/3	0/3
8	L'Oréal	20	#3	–	–	1.7%	1/3	0/3
9	Merit	17	#4	#9	–	5.2%	2/3	0/3
10	Hourglass	13	–	#5	#7	6.9%	2/3	0/3

8 more brands named with lower scores. Engine columns show the brand's position in each answer (– = not named). Share of voice = share of all brand mentions in the three answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

SOURCES BEHIND THESE ANSWERS

whowhatwear.com	3	1
Google Shopping cards		3
ulta.com	2	1
allure.com		1

Plus 5 more sites.

WHO IS MISSING

NAMED BY ONLY 1 ENGINE L'Oréal, MAC and NYX

QUOTE IT. #1 in AI answers for "Best blush brands": Rare Beauty (AI Rank Score 70/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

2 · QUESTION 8 OF 10

"Best eyebrow product brands"

Anastasia Beverly Hills is the clear AI pick for eyebrow products

15	100	All 3	15
brands named across the three answers	AI Rank Score for Anastasia Beverly Hills	engines agree on the #1 brand	sources cited, none from brand sites

Anastasia Beverly Hills scores 100 and is the first pick on all three engines. Benefit is a distant second at 80. In total 15 brands are named, and the top three take 50% of all brand mentions.

Exhibit 4.8

Anastasia Beverly Hills scores 100, out of 15 brands named.

AI Rank Score and engine positions, top 10 brands for "Best eyebrow product brands"

#	BRAND	AI RANK SCORE	CHATGPT	GEMINI	AI OVERVIEWS	SHARE OF VOICE	RECOM-MENDED	#1 PICK
1	Anastasia Beverly Hills	100	**#1**	**#1**	**#1**	24.1%	3/3	3/3
2	Benefit	80	#2	#2	#2	15.5%	3/3	0/3
3	Glossier	30	#5	#3	–	10.3%	2/3	0/3
4	NYX	23	#3	#6	–	10.3%	2/3	0/3
5	IT Cosmetics	20	–	–	#3	3.4%	1/3	0/3
6	e.l.f.	17	–	#7	#4	8.6%	2/3	0/3
7	Kosas	13	–	#4	–	3.4%	1/3	0/3
8	Maybelline	13	#4	–	–	1.7%	1/3	0/3
9	REFY	10	–	#5	–	6.9%	1/3	0/3
10	Charlotte Tilbury	3	–	#10	–	1.7%	1/3	0/3

5 more brands named with lower scores. Engine columns show the brand's position in each answer (– = not named). Share of voice = share of all brand mentions in the three answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

SOURCES BEHIND THESE ANSWERS

whowhatwear.com	4	
Google Shopping cards		3
sephora.com	1	1
popsugar.com		1

Plus 5 more sites.

WHO IS MISSING

NAMED BY ONLY 1 ENGINE Maybelline

QUOTE IT. #1 in AI answers for "Best eyebrow product brands": Anastasia Beverly Hills (AI Rank Score 100/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

2 · QUESTION 9 OF 10

"Best makeup primer brands"

e.l.f. leads AI answers for makeup primer, ahead of Milk Makeup

14	70	2 of 3	17
brands named across the three answers	AI Rank Score for e.l.f.	engines agree on the #1 brand	sources cited, 1 from brand sites

e.l.f. scores 70. Two of the three engines rank it first. Gemini puts it at #11 and picks Milk Makeup instead. Milk Makeup follows at 60. In total 14 brands are named, and the top three take 44% of all brand mentions.

Exhibit 4.9

e.l.f. scores 70, out of 14 brands named.

AI Rank Score and engine positions, top 10 brands for "Best makeup primer brands"

#	BRAND	AI RANK SCORE	CHATGPT	GEMINI	AI OVERVIEWS	SHARE OF VOICE	RECOM-MENDED	#1 PICK
1	e.l.f.	70	**#1**	#11	**#1**	15.4%	3/3	2/3
2	Milk Makeup	60	–	**#1**	#2	12.8%	2/3	1/3
3	Smashbox	50	#5	#3	#3	15.4%	3/3	0/3
4	Benefit	40	#2	#4	–	5.1%	2/3	0/3
5	ONE/SIZE	27	–	#2	–	2.6%	1/3	0/3
6	Hourglass	23	#3	#10	–	5.1%	2/3	0/3
7	Bobbi Brown	17	–	#6	#4	7.7%	2/3	0/3
8	NYX	17	#4	#12	–	7.7%	2/3	0/3
9	Maybelline	10	–	–	#5	2.6%	1/3	0/3
10	Tatcha	10	–	#5	–	7.7%	1/3	0/3

4 more brands named with lower scores. Engine columns show the brand's position in each answer (– = not named). Share of voice = share of all brand mentions in the three answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

SOURCES BEHIND THESE ANSWERS

youtube.com	1	2
allure.com		1
amazon.com		1
byrdie.com		1

Plus 11 more sites.

WHO IS MISSING

NAMED BY ONLY 1 ENGINE Maybelline, L'Oréal and Charlotte Tilbury

QUOTE IT. #1 in AI answers for "Best makeup primer brands": e.l.f. (AI Rank Score 70/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

2 · QUESTION 10 OF 10

"Best tinted moisturizer brands"

Laura Mercier edges out bareMinerals for tinted moisturizer

15	73	2 of 3	32
brands named across the three answers	AI Rank Score for Laura Mercier	engines agree on the #1 brand	sources cited, none from brand sites

Laura Mercier scores 73, although only Gemini ranks it first. bareMinerals is close behind at 70, so this question could change hands next month. ChatGPT and Google AI Overviews put bareMinerals first, while Gemini goes with Laura Mercier. The field is wide open: 15 brands are named and the top three take only 38% of mentions.

Exhibit 4.10

Laura Mercier scores 73, out of 15 brands named.

AI Rank Score and engine positions, top 10 brands for "Best tinted moisturizer brands"

#	BRAND	AI RANK SCORE	CHATGPT	GEMINI	AI OVERVIEWS	SHARE OF VOICE	RECOM-MENDED	#1 PICK
1	Laura Mercier	73	#4	**#1**	#2	16.2%	3/3	1/3
2	bareMinerals	70	**#1**	#6	**#1**	10.8%	3/3	2/3
3	NARS	57	#2	#2	#6	10.8%	2/3	0/3
4	Ilia	40	#3	#3	–	10.8%	2/3	0/3
5	Milk Makeup	20	–	–	#3	5.4%	1/3	0/3
6	e.l.f.	13	#7	–	#5	5.4%	2/3	0/3
7	IT Cosmetics	13	–	–	#4	2.7%	1/3	0/3
8	Saie	13	–	#4	–	5.4%	1/3	0/3
9	Supergoop	10	#5	–	–	2.7%	1/3	0/3
10	Tower 28	10	–	#5	–	5.4%	1/3	0/3

5 more brands named with lower scores. Engine columns show the brand's position in each answer (– = not named). Share of voice = share of all brand mentions in the three answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

SOURCES BEHIND THESE ANSWERS

youtube.com		3	
ulta.com	1	1	1
Google Shopping cards			3
reddit.com		2	1

Plus 18 more sites.

WHO IS MISSING

NAMED BY ONLY 1 ENGINE Supergoop

QUOTE IT. #1 in AI answers for "Best tinted moisturizer brands": Laura Mercier (AI Rank Score 73/100, recommended by 3 of 3 AI engines). Source: Answer Engine Daily AEO Index, U.S., October 2026, powered by markaeo.com

3 · THE ENGINES DISAGREE

All three engines agree on the top pick for just two questions

Lipstick and brows are the only questions where ChatGPT, Gemini and Google AI Overviews name the same #1 brand. The answers differ in shape too. Gemini's are the longest (about 1,020 words) and name the most brands, 11.4 per answer. Google AI Overviews stays brief at about 205 words and 6.5 brands, and no other engine cites Google Shopping product cards.

That matters brand by brand. Google AI Overviews ranks Charlotte Tilbury first three times, yet ChatGPT names it in just 20% of its answers. ChatGPT names NARS and Maybelline in half its answers each, and Gemini and Google AI Overviews each name e.l.f. in 80% of theirs.

Exhibit 5

The engines agree on lipstick and brows and divide on the rest.

Brand ranked #1 by each engine, by question

QUESTION	CHATGPT	GEMINI	GOOGLE AI OVERVIEWS	
Best foundation	Estée Lauder	Armani Beauty	Estée Lauder	Split
Best mascara	YSL	Lancôme	Charlotte Tilbury	Split
Best concealer	NARS	NARS	e.l.f.	Split
Best lipstick	Charlotte Tilbury	Charlotte Tilbury	Charlotte Tilbury	✓ All agree
Best eyeshadow palette	Natasha Denona	Natasha Denona	Anastasia Beverly Hills	Split
Best setting spray	Charlotte Tilbury	Urban Decay	Charlotte Tilbury	Split
Best blush	NARS	Rare Beauty	Rare Beauty	Split
Best eyebrow product	Anastasia Beverly Hills	Anastasia Beverly Hills	Anastasia Beverly Hills	✓ All agree
Best makeup primer	e.l.f.	Milk Makeup	e.l.f.	Split
Best tinted moisturizer	bareMinerals	Laura Mercier	bareMinerals	Split

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

Visibility and #1 picks by engine, top 6 brands (% of each engine's 10 answers / number of #1 picks)

BRAND	CHATGPT	GEMINI	AI OVERVIEWS
Charlotte Tilbury	20% / 2×#1	50% / 1×#1	50% / 3×#1
NARS	50% / 2×#1	50% / 1×#1	40% / 0×#1
e.l.f.	40% / 1×#1	80% / 0×#1	80% / 2×#1
Anastasia Beverly Hills	20% / 1×#1	20% / 1×#1	20% / 2×#1
Benefit	30% / 0×#1	30% / 0×#1	10% / 0×#1
Maybelline	50% / 0×#1	50% / 0×#1	30% / 0×#1

4 · WHERE AI LEARNS ABOUT MAKEUP

Each engine relies on its own mix of sources

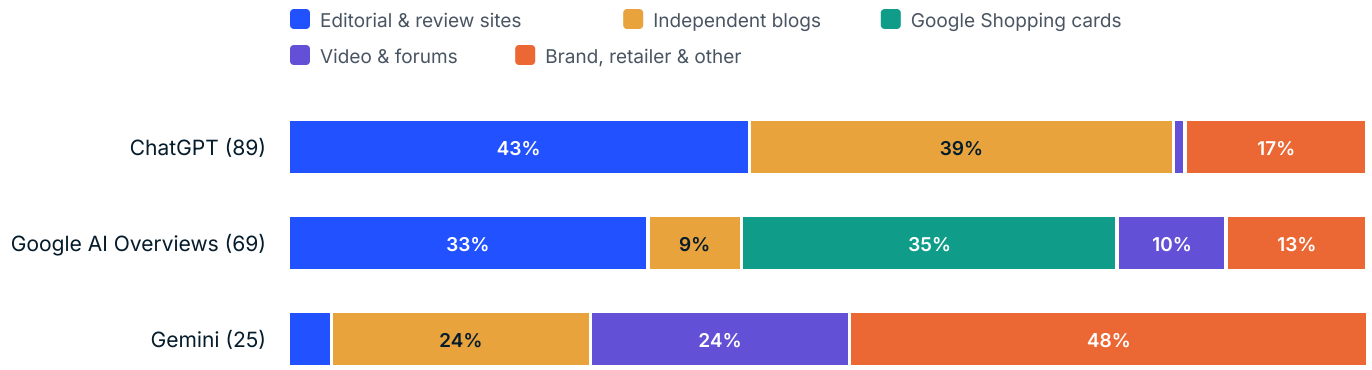
Over the ten questions the engines cited 183 sources from 75 websites, and only 10 of those citations (5.5%) go to a brand's own website. The rest come from beauty editors, retailers, blogs, video, forums and Google Shopping.

Habits vary by engine. ChatGPT cites the most sources (89) and leans on Who What Wear, Ulta and Vogue; it cited a single Reddit thread or YouTube video. Google AI Overviews pairs Google Shopping cards with editorial reviews from Allure and Byrdie. Gemini cited sources in only 3 of its 10 makeup answers.

Exhibit 6

Outside sources provide 94.5% of the citations behind AI makeup recommendations.

Share of cited sources by type and engine, %



Figures in brackets show how many sources each engine cited across the 10 questions. Gemini cited sources in 3 of its 10 answers.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

6%	1	35%	3 of 10
of citations come from brands' own websites	**Reddit or YouTube citations by ChatGPT in this category**	**of AI Overviews' citations are Google Shopping cards**	**Gemini answers that cite any source**

More cited pages lead with Maybelline than any rival

We read the 101 cited articles we could open, and L'Oréal appears on the most (45%). Maybelline is the main subject of 11 pages, more than any other brand, and is never ranked first. A cited page that centers on a brand is no guarantee of first place.

Exhibit 7

Maybelline leads 11 cited pages yet is never ranked first.

Share of 101 cited articles that mention each brand, number of articles where it is the most mentioned brand, and #1 picks

BRAND	MENTIONED ON CITED PAGES	PAGES WHERE IT IS THE MAIN BRAND	#1 PICKS (OF 30)
Charlotte Tilbury	42%	6	6
NARS	21%	4	3
e.l.f.	37%	8	3
Anastasia Beverly Hills	23%	6	4
Benefit	16%	1	0
Maybelline	32%	11	0

Based on the 101 of 149 cited article pages we could open. Video, social and Google Shopping links are excluded. A brand counts as the main brand on a page when it is mentioned more often than any other.

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

Exhibit 8

Google Shopping, Who What Wear and Ulta shape what AI says about makeup.

Most cited domains across 30 answers, with the engines that cited them and the brands they feature most

ChatGPT · Gemini · Google AI Overviews · Number = citations by that engine

WEBSITE	CITATIONS	CITED BY	QUESTIONS	BRANDS IT FEATURES MOST
Google Shopping cards	24	24	10	Product listings
whowhatwear.com	20	17, 3	7	L'Oréal, MAC, Chanel, Charlotte Tilbury
ulta.com	15	10, 1, 4	8	e.l.f., Tarte, MAC, bareMinerals
allure.com	12	5, 7	8	L'Oréal, Armani Beauty, Estée Lauder, Charlotte Tilbury
youtube.com	9	1, 4, 4	5	Video and discussion (not analyzed)
byrdie.com	8	8	8	Page could not be opened
vogue.com	7	7	7	Hourglass, Ilia, Saie, Danessa Myricks
reddit.com	5	2, 3	3	Video and discussion (not analyzed)

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

5 · WHAT LEADERS SHOULD DO NOW

What leaders should do now

CEOs

- Track AI recommendation share by product, alongside market share and brand health.
- Ask your team for the top pick rate; mention counts alone flatter the brand.
- Fund AEO as an ongoing program. Engine answers change every month, so any single campaign will fade.

CMOs

- Name the products you need to win, such as "best mascara brands", and measure each engine on its own.
- Manage Google Shopping product data as part of AEO. It supplies 34.8% of AI Overviews' makeup citations.
- Keep retailer pages complete; ChatGPT cited Ulta 10 times on the makeup questions.

Brand & PR teams

- Rank beauty editors at Who What Wear, Allure, Byrdie and Vogue above general news coverage.
- Gemini and Google AI Overviews cite YouTube and Reddit, so get honest product reviews onto one and join real discussions on the other.
- Start with pages that mention you but cover another brand first. New placements can come after that.

Agencies

- Use a fixed set of questions and report the AI Rank Score and top pick rate engine by engine.
- Trace the sources behind each competitor's #1 picks and target coverage on those same sources.
- Benchmark your results monthly against the Answer Engine Daily index.

The makeup citation playbook: where to be cited

Every source below was cited by at least one engine while answering this month's ten makeup questions. The number in brackets is how often it was cited.

Must win

Cited across engines and questions

- Google Shopping product listings (24, AI Overviews only)
- Who What Wear (20, 7 questions)
- Ulta (15)
- Allure (12)

Editorial

Shapes ChatGPT's and AI Overviews' shortlists

- Byrdie (8, AI Overviews only)
- Vogue (7, ChatGPT only)
- InStyle (3)
- Woman & Home (3)

Retail & community

Adds proof from shoppers and stores

- YouTube reviews (9)
- Sephora (5)
- Reddit (5)
- Amazon (3)

See the full picture for your brand

The public index shows where your brand stands this month. A private markaeo audit goes further. It benchmarks you against the competitors you name across hundreds of questions, tracks each engine every week and lists the exact pages behind each competitor's #1 picks. It also ties AI visibility to your traffic and revenue. **markaeo.com**

APPENDIX

Brand scorecard: the 20 highest ranked makeup brands

Exhibit A1

All eight index metrics for makeup.

Percentages are shares of the 30 AI answers. Missing counts questions where the brand sells in the segment but no engine named it

#	BRAND	AI RANK SCORE	VISIBILITY	RECOM-MENDATION	TOP PICK	SHARE OF VOICE	ALL 3 ENGINES	SHOPPING CARDS	OWN-SITE CITES	MISSING
1	**Charlotte Tilbury**	**25.3**	40%	37%	20%	4.6%	2/10	3	0	1 of 8
2	**NARS**	**24.0**	47%	43%	10%	5.3%	4/10	1	0	2 of 7
3	**e.l.f.**	**19.7**	67%	63%	10%	7.6%	3/10	4	2	1 of 10
4	**Anastasia Beverly Hills**	**17.3**	20%	20%	13%	4.4%	2/10	2	1	0 of 2
5	**Benefit**	**15.0**	23%	23%	0%	2.5%	1/10	0	0	0 of 1
6	**Maybelline**	**13.3**	43%	43%	0%	4.8%	2/10	1	0	1 of 7
7	**Urban Decay**	**11.3**	20%	20%	3%	2.5%	1/10	1	1	0 of 2
8	**Pat McGrath**	**9.7**	20%	20%	0%	2.3%	0/10	0	1	–
9	**Armani Beauty**	**9.3**	20%	20%	3%	2.5%	1/10	0	0	–
10	**Estée Lauder**	**9.3**	10%	10%	7%	1.3%	1/10	1	0	5 of 6
11	**Natasha Denona**	**9.3**	10%	10%	7%	1.5%	1/10	1	1	0 of 1
12	**Tarte**	**9.0**	20%	20%	0%	2.1%	1/10	0	0	–
13	**Milk Makeup**	**9.0**	13%	13%	3%	1.7%	0/10	0	0	–
14	**L'Oréal**	**8.3**	33%	33%	0%	3.2%	1/10	0	0	1 of 6
15	**Rare Beauty**	**8.3**	23%	23%	7%	2.1%	1/10	1	0	2 of 6
16	**Laura Mercier**	**8.0**	17%	17%	3%	1.7%	1/10	1	0	0 of 1
17	**ONE/SIZE**	**8.0**	13%	13%	0%	1.1%	1/10	0	0	0 of 1
18	**Tower 28**	**7.7**	23%	23%	0%	2.3%	0/10	0	0	–
19	**Ilia**	**7.0**	23%	23%	0%	2.7%	1/10	0	0	0 of 1
20	**Saie**	**7.0**	20%	20%	0%	2.3%	1/10	0	0	–

Source: Answer Engine Daily AEO Index, U.S., October 2026 · 10 questions × 3 engines (ChatGPT, Gemini, Google AI Overviews), 30 answers · analysis powered by markaeo.com

METHODOLOGY

How the index is built

Questions	Ten fixed buying questions that never name a brand.
Engines	ChatGPT (OpenAI), Gemini (Google) and Google AI Overviews, run on 21 October 2026. One answer per question per engine, 30 answers in all.
Location	All answers were collected from a single city in the United States. AI engines tailor answers to where the user is, so people asking the same questions from other cities, states or countries may see different brands, rankings and sources.
Brand detection	We match brand names and their product lines in each answer and checked samples of the matches by hand.
Rank	A brand's position in the engine's list of recommendations. If an answer has no list, we use the order in which brands are named.
AI Rank Score	Points by position (#1 = 10, #2 = 8, #3 = 6, #4 = 4, #5 = 3, lower = 1, not named = 0), added up across engines and questions and scaled to 100.
Visibility	Share of the 30 answers that name the brand.
Recommendation rate	Share of answers that include the brand in the AI's list of picks.
Top pick rate	Share of answers that rank the brand #1.
Share of voice	The brand's share of all brand mentions in the category.
Missing	A major brand that sells in the segment but that none of the three engines named for that question.
Sources	We classified all 183 citations by type and read the 101 article pages we could open to see which brands each one covers.
Limitations	One run per engine, from one U.S. location. AI answers vary between runs, over time and by location. Gemini returned sources for 3 of its 10 makeup answers. The results describe what AI engines say, which is a separate question from product quality.

THE TEN MAKEUP QUESTIONS

1. Best foundation brands
2. Best mascara brands
3. Best concealer brands
4. Best lipstick brands
5. Best eyeshadow palette brands
6. Best setting spray brands
7. Best blush brands
8. Best eyebrow product brands
9. Best makeup primer brands
10. Best tinted moisturizer brands

ABOUT

About this index

Answer Engine Daily

answerenginedaily.com

Answer Engine Daily publishes a free monthly U.S. index of how AI engines rank brands. It tracks 200 buying questions across 20 consumer categories, including footwear, skincare, credit cards and airlines.

markaeo

markaeo.com

markaeo runs private AEO audits for brands and agencies. It benchmarks a brand against named competitors across hundreds of questions and tracks each engine separately. It also connects AI visibility to traffic and revenue.

How to cite this report

Brands named #1 may quote their result if they include the question, the month and a link, for example: "#1 in AI answers for 'Best lipstick brands', Answer Engine Daily AEO Index, U.S., October 2026 (answerenginedaily.com), powered by markaeo.com."

This report records how AI engines answered a fixed set of questions on one date. It says nothing about product quality. Brand names are trademarks of their owners and appear here for identification only. Results will move from month to month as the engines update.

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2. One location, one date

All answers were collected on 21 October 2026 from a single location in one city in the United States, with one query per question per engine. AI answers are personalized and change with location, time, device, account history, language and model updates, and the same question asked twice can produce a different answer. People in other cities, states or countries, or on other dates, may see different brands, rankings and sources. The findings describe these answers only. They are not representative of all users, all locations or the market as a whole.

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