

**Google Market
Share Report for
The Beauty Industry**

AN IN-DEPTH ANALYSIS

Who's winning (and who's not)
in the organic search landscape



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Executive Summary

The digital landscape of the global beauty market is rapidly changing. Prior to the pandemic, 85% of beauty products were purchased in person. During the pandemic, online cosmetic sales have been increasing by 10% month-over-month. Digital native brands performed exceptionally well with more consumers shopping for beauty products online.

In this ever-changing digital landscape, disruptive beauty publishers, informational websites, and direct-to-consumer brands are leading the way online.

Organic search represents a significant business opportunity for beauty brands. Strategic and optimized content enhance the connection with consumers precisely at the time that they are seeking products and services.

To that end, Terakeet analyzed 3,168 high-value, non-branded beauty industry terms, which account for 9,393,580 monthly Google searches.

Capitalizing on the opportunity, however, is neither straightforward nor easy. The beauty market has experienced a shift in consumer demand following the COVID-19 pandemic. With social distancing, work from home (WFH), and mask requirements, consumers are prioritizing alternative beauty products. As a result, the organic search landscape today looks significantly different compared to pre-pandemic times.

With this in mind, Terakeet analyzed the organic search landscape in Google for the Skincare, Hair Care, and Makeup markets to clarify the reality for today's beauty brands and to identify the underlying levers of success for the market share winners.

Terakeet's Market Analysis

This analysis report looks at the Google organic search landscape for three primary areas of the beauty industry, along with nine underlying market sectors, as follows:

SKINCARE

- > **Cleansers**
- > **Moisturizers**
- > **Anti-Aging**

HAIR CARE

- > **Treatments**
- > **Styling**
- > **Tools**

MAKEUP

- > **Face**
- > **Eye**
- > **Lip**



Informational Versus Product Keywords

Within the nine underlying market sectors, Terakeet segmented keywords into two separate categories based on search intent: product and informational. If Google determines that users prefer informational content when they search certain keywords, then its algorithm returns educational pages such as beauty guides, tutorials, and best of makeup tips. However, if Google finds that users want to purchase something when they search specific queries, then its algorithm will prioritize category or product pages instead.

Identifying how consumers search online is essential for brands to enhance their digital marketing efforts and deliver content that consumers value. Understanding the search intent for relevant keywords, especially when consumers are eager for information and open to discovering new brands, can help marketers improve brand visibility and enhance the journey for their audience.

Publishers & Direct-to-Consumer Brands Are Dominating in Google

It may come as a surprise to those in the industry that non-beauty brands (publishers, informational websites, etc.) are stealing large percentages of Google organic market share from established brands and major beauty retailers. This is especially true for Skincare and Hair Care. (Beauty brands and retailers are holding their own to a stronger degree in the Makeup market.) When looking at Skincare specifically, for example, with 2,213,240 monthly searches across 915 keywords, six of the seven top market share holders are publications that do not even sell Skincare products.

When looking more granularly in the Cleansers market sector, which represents 957,000 monthly searches across 296 keywords, Allure.com outperforms every major beauty brand and retailer, and 70% of the top 10 market share holders are non-beauty brands and non-beauty retailers.



Even when looking exclusively at product-specific keywords (where an individual is looking for a certain type of product in Google but doesn't specify the brand), beauty brands and retailers are losing out on a large share of the organic search market. In the Cleansers market sector, for example, publishers are capturing close to half of the search traffic for product-related queries. The top three, and the top five of eight, market share holders of this type of query are publishers.

Imagine what that translates into lost opportunity. That's approximately 4,560,000 website visits that established beauty brands offering products in the Cleanser market sector are not seeing every year.

The Makeup Market

In Makeup, beauty brands and retailers are performing better in organic search than in the Skincare and Hair Care markets. This shows that with the right approach, beauty brands and retailers have the opportunity to capture greater organic market share in other sectors, as well.

Regardless, it's interesting to see that informational sites and publishers are still able to secure a significant amount of market share, even if lower than in Skincare and Hair Care. Byrdie, for example, has the highest market share among any brand for the Makeup market.





The COVID-19 Pandemic Has Shifted Consumer Search Intent

One of the reasons so many prominent beauty brands underperform in Google's organic results is a lack of understanding of what consumers (and Google) are looking for today.

With the onset of COVID-19 came lockdowns and brick and mortar shopping limitations. As a result, ecommerce sales in the United States increased by 44% from 2019 through 2020 (Source: Digital Commerce 360), leading to a major shift in the online search landscape. Consumers who used to buy from department stores or retailers could no longer seek advice from beauticians. This created a vacuum of knowledge, forcing consumers to turn to Google for answers. Consequently, search terms that were previously transactional in nature began to include a more informational intent. Consequently, Google began to reward websites that published content aligned with this new consumer behavior.

How can beauty brands position themselves to increase organic traffic when online search behavior is rapidly evolving?

First, it's essential to understand the behavior shifts in the consumer landscape that are happening throughout the funnel. Then, you can leverage that data to produce more effective content that your audience needs in order to make purchasing decisions.

The current reality, though, is that many beauty brands focus their content marketing around selling products rather than informing consumers. As a result, they only capture a small slice of the market opportunity from the segment of consumers who are already familiar with the brand and ready to buy. Since product pages are misaligned with the vast majority of beauty-related searches, brands won't show up on the first page of Google unless they prioritize relevant, authoritative, high-quality informational content.

Google rewards content at the top and in the middle of the funnel, not just lower funnel information. The upstream connection to the audience leads to brand affinity, loyalty, and repeat business, and we suspect also leads to a higher customer lifetime value (CLV).



Understanding the Competitive Landscape

As the market continues to shift, beauty brands and retailers must stay ahead of these trends by analyzing search data and delivering valuable, intent-aligned content to their customers.

If you're serious about market share, then you need to analyze the competitive search landscape and identify all the levers you can pull to outrank your competitors and grow site traffic.

Are You Winning?

Is your business winning in Google organic search?

How does your organic search performance compare against your traditional competitors? Against disruptors? Against publishers, informational websites, and direct-to-consumer brands?

What's at stake is billions of dollars in potential Google market share.

Read on for a granular look at each market along with the associated market sectors. See if you're competitive or far behind your competitors, and uncover what the market leaders are doing right.





Google Market
Share Report for
The Beauty Industry

SECTOR 1:

Skincare

KEY POINTS:

Publishers and blogs have snatched up a large amount of Google organic market share in the Skincare market through the pandemic and are winning a larger share of organic search over time.

The Skincare market is experiencing a shift in search behavior, as Google is favoring informational content in the SERPs over product-related, transactional web pages, even for many non-branded product-related queries.

With a weak content portfolio, traditional beauty brands and retailers are losing a great deal of market share even on product-related searches.

Beauty brands and retailers that once held a higher Google organic market share are at risk of being outranked in a short period of time.

The common thread among top-performing websites that are increasing market share is the abundance of well-organized, long-form content.

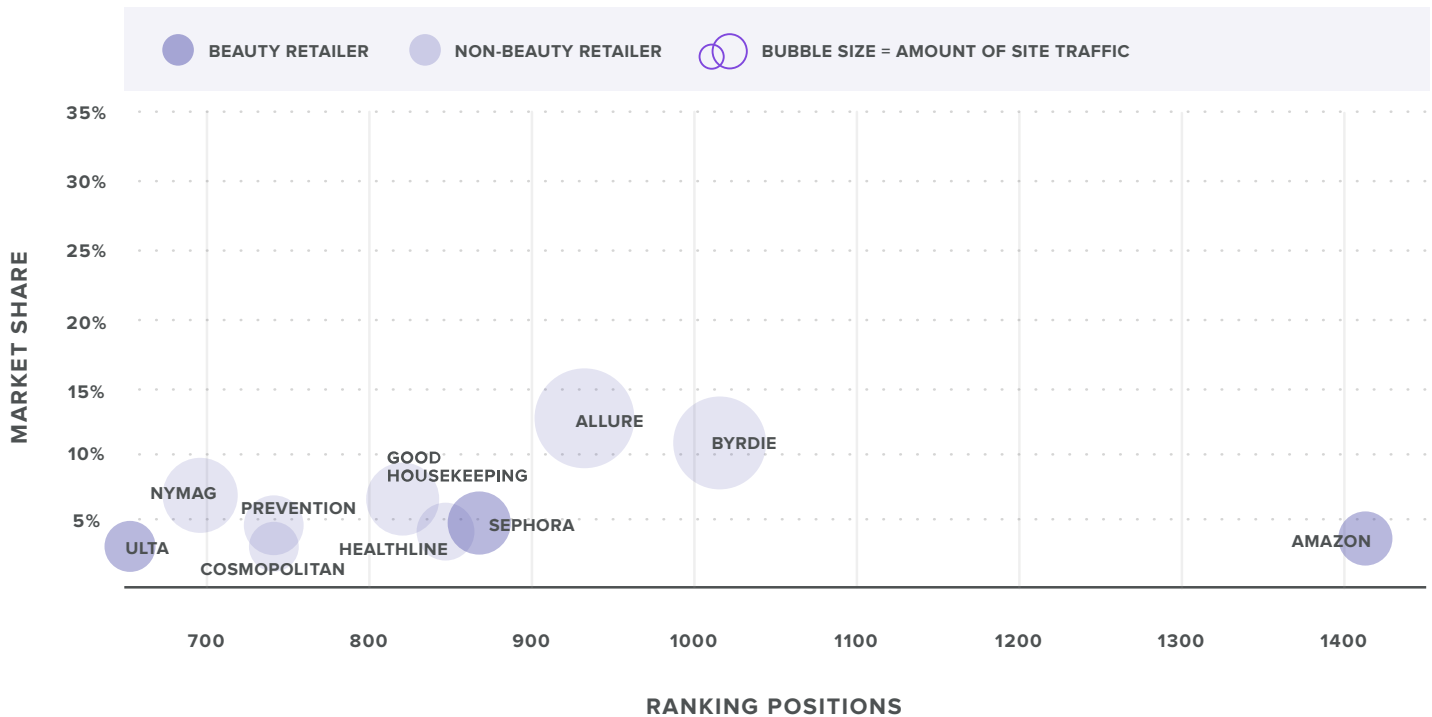


Skincare

Google Organic Market Share Analysis

MARKET: SKINCARE

FIGURE 1



EXECUTIVE SUMMARY

Terakeet analyzed the Google organic search landscape for the Skincare market, including the following market sectors:

- > [Cleansers](#)
- > [Moisturizers](#)
- > [Anti-Aging](#)

As you can see in the chart above, beauty brands and retailers are being outperformed by publishers and informational websites when looking at the search market landscape at a 10,000 foot view. In fact, 4 of the top 5 brands within the Skincare market are publishers and hold more than 36% of the market share. Sephora is the only beauty brand in the top 5 at 4.74% market share. Zooming out, among the top 22 market share holders in Skincare, 17 are publishers or informational websites, capturing 62.34% of available search traffic.

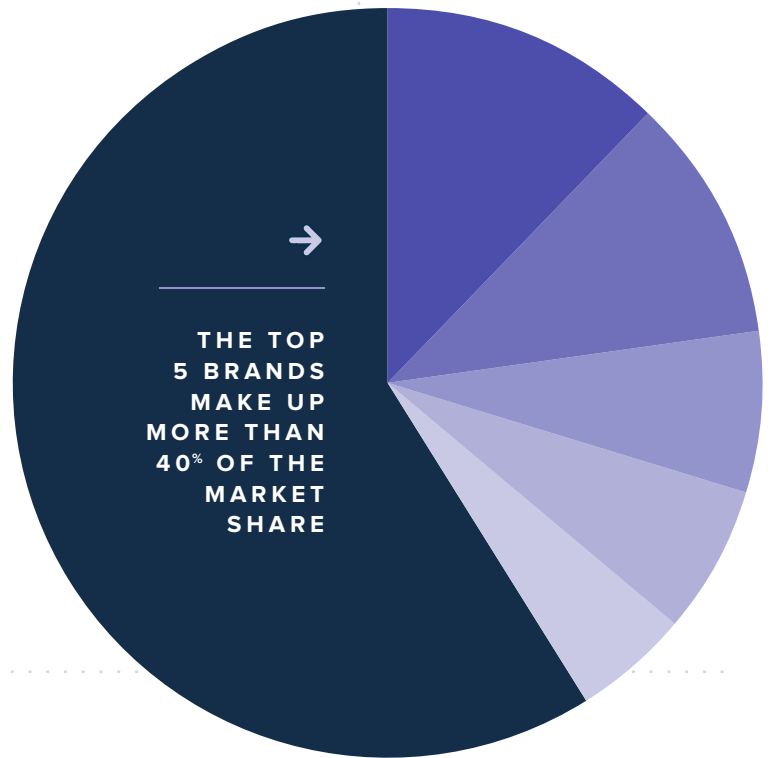


Top 5 Brands

It's one thing to understand market share. It's quite another to understand the underlying reasons why certain websites are crushing it in organic search and others are underperforming given their offline size and market presence.

To that end, we analyzed the five brands with the highest market share (representing roughly 607,400 in monthly organic search traffic)

Why are these websites capturing such a significant percentage of search market share in the Skincare market? You can find a few of the key aspects that help them to rank so well in Google, as follows:



1

Allure

12.39% MARKET SHARE

- Allure has a wealth of long-form content
- Beauty trends, product reviews, gift guides, videos, and more
- Over 43,800 websites pointing links at Allure

2

Byrdie

10.63% MARKET SHARE

- Byrdie has a wealth of long-form content
- Product review pages, gift guides, and a news section
- Over 87,700 websites pointing links at Byrdie

3

New York Magazine (NYMag)

6.82% MARKET SHARE

- New York Magazine has a wealth of long-form content
- Best of New York series, gift guides, and a news section
- Over 306,000 websites pointing links at New York Magazine

4

Good Housekeeping

6.54% MARKET SHARE

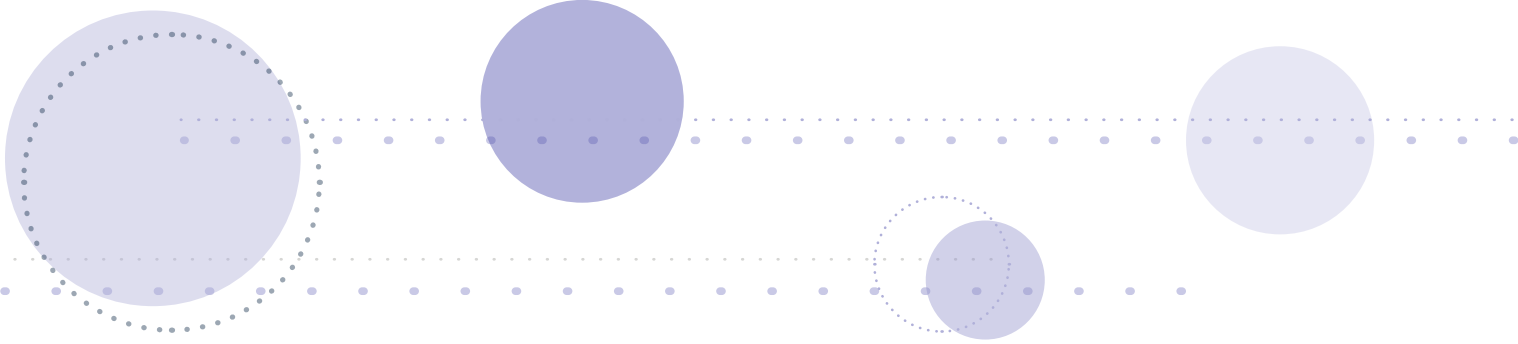
- Good Housekeeping has a wealth of long-form content
- Interactive quizzes, product reviews, recipes, and virtual summits
- Over 93,500 websites pointing links at Good Housekeeping

5

Sephora

4.74% MARKET SHARE

- Sephora has a wealth of beauty guides and “best of” product sections
- Beauty Insider Community forum and Q&A
- Over 89,000 websites pointing links at Sephora



Close to half of all the Skincare product-focused searches are going to non-beauty brands and non-beauty retailers

Takeaways

One common thread among all five of these top-performing websites is the abundance of well-organized long-form content.

Let's look at the "Skincare" section of Allure.com, for example. The average word count of its 10 most recent articles at the time of this writing is 1,774. Allure's topic area about the "best of" beauty products boasts an average word count of 2,760. And it's not just these two sections of the site. Allure's long-form content is pervasive throughout the site. It's this commitment to long-form content that has helped it to capture over 12% of the Google organic search market share of the Skincare keywords examined.

A second common thread among the four top websites is that they diversify their content by offering site visitors comprehensive beauty guides, gift guides, product review pages, etc. These specialized content hubs are not only helpful to site visitors, but also act as backlink magnets. For example, the beauty trends section of the Allure website has attracted 51,000+ backlinks from more than 4,400 websites. The product reviews area of the website ranks on Google page one for more than 25,900 keywords in the U.S., and has 156,000 ranking keywords overall. The area has attracted approximately 24,200 links from more than 2,200 websites. And the video area of the site boasts an additional 6,300+ links from roughly 800 websites.

Beauty brands that are looking to win in organic search on non-branded terms need a solid content strategy that targets shoppers throughout the decision making process. As demonstrated by the organic search market share leaders, content volume matters, but so does depth and quality.

Product vs. Informational Search Queries

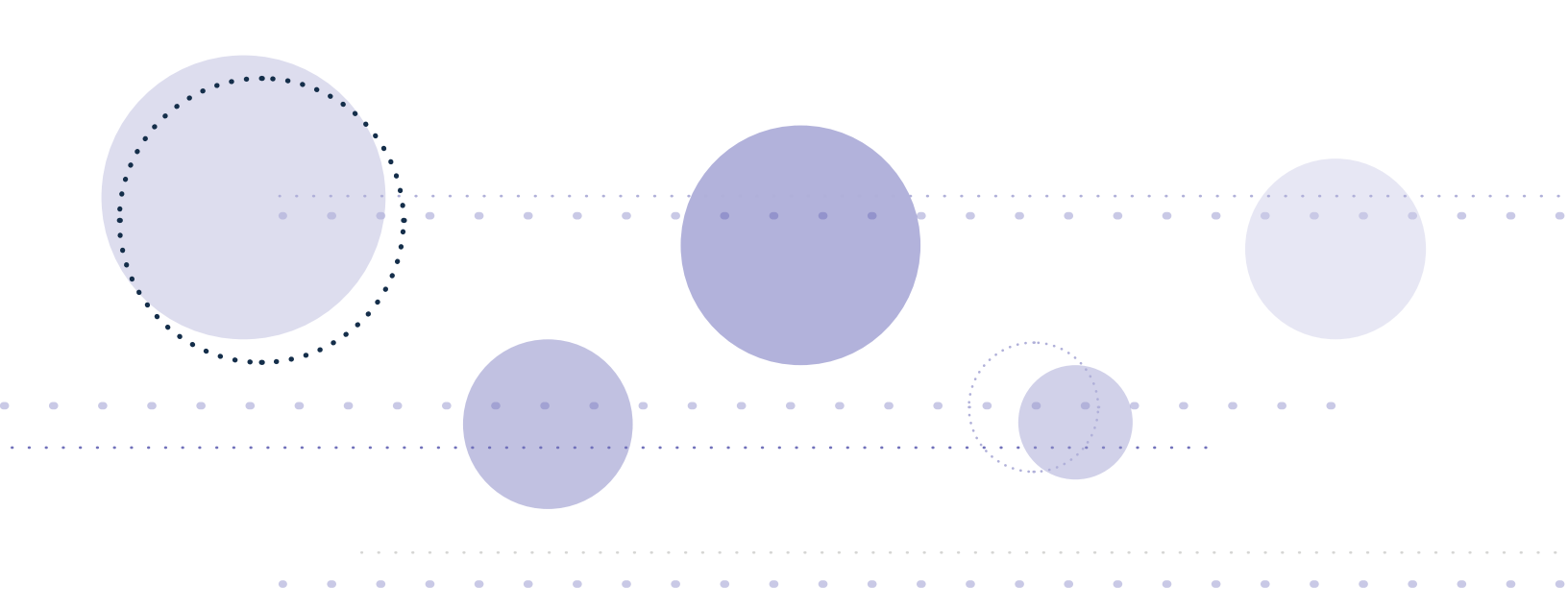
Beauty brands with a sliver of Google organic market share may believe that their poor performance applies only to informational keyword searches, where the searcher is more interested in learning something than buying something.

What Terakeet's analysis found, though, is that traditional beauty brands and retailers are losing a great deal of market share even on product-related searches, where the individual is actively seeking to purchase a certain type of product. Our analysis exclusively focused on non-branded searches, meaning that although these product-searchers had a purchase intent, they were open to finding or learning about new brands. In other words, there was no brand preference in their search.

This is a major business opportunity for beauty brands and retailers given the lifetime value of a loyal customer. Yet, online publishers and informational websites continuously outperform cosmetics companies, siphoning millions of monthly visitors and all the corresponding potential revenue.

When looking at 109 product-related keywords within the Skincare market (representing 386,720 monthly Google searches), six of the top 10 are publishers or blogs. Overall, publishers and blogs hold 47.77% market share.





Market Share Trends

Beauty brands and retailers that once held a higher Google organic market share are at risk of being outranked in a short period of time. In February 2019, Sephora had the second highest market share for the Skincare terms examined at 7.70%. Two years later, in February 2021, Sephora's market share declined to 4.74% and the company dropped to 5th overall in Skincare market share. The brand ranks lower than Allure, Byrdie, Nymag.com, and Goodhousekeeping.com — all of which are publishers.

Similarly, Ulta lost significant market share in Skincare within 24 months. In February 2019, Ulta had 5.63% market share and ranked 3rd. By February 2021, Ulta market share dropped to 3.00%. The brand fell six ranking positions and is now sitting behind five publishers in share.

Even Amazon lost positioning in the Skincare market over the two-year period leading up to February 2021. Whereas Amazon ranked fourth in Google organic market share in February 2019, they fell to seventh two years later.

Why is it that so many established beauty brands and retailers are performing so poorly and yielding so much traffic and potential revenue to others?

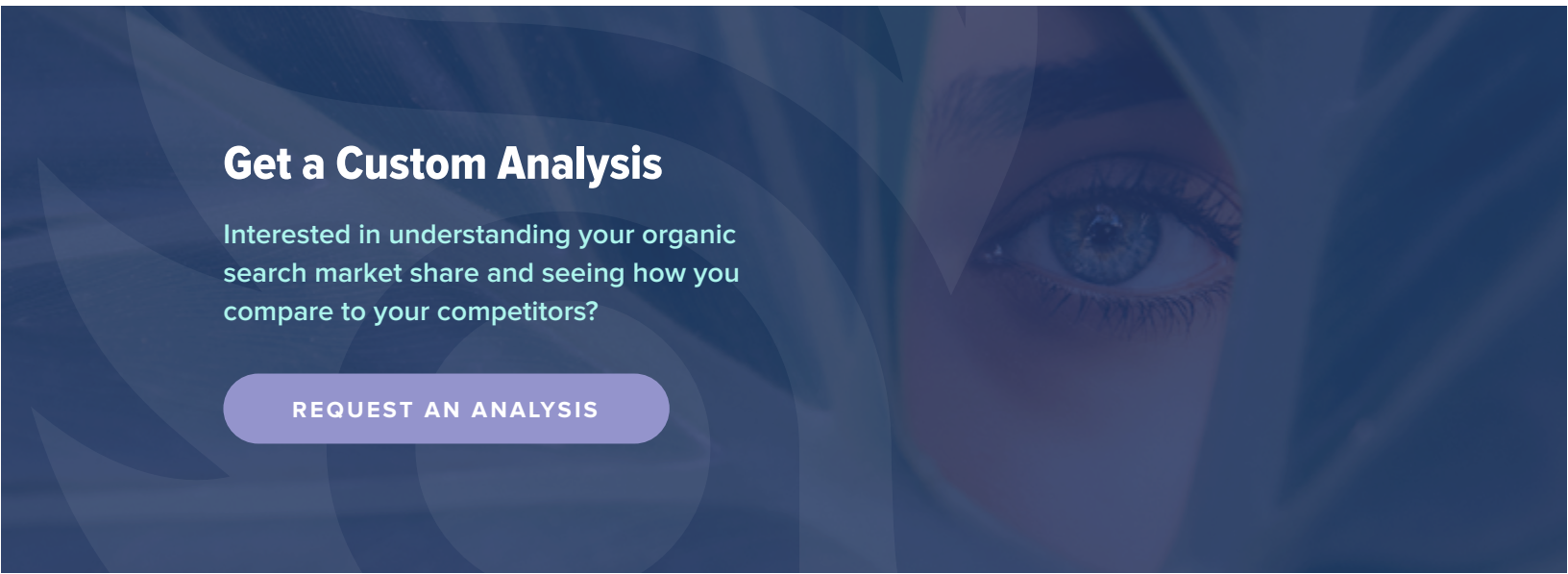
A Deeper Dive

Of course, different brands offer different products and focus on different topics, so it's important to analyze the data at a more granular level in order to fully understand the organic search performance across the Skincare market. To that end, you can find a further breakdown of the (1) Cleansers, (2) Moisturizers and (3) Anti-Aging sectors below.

Get a Custom Analysis

Interested in understanding your organic search market share and seeing how you compare to your competitors?

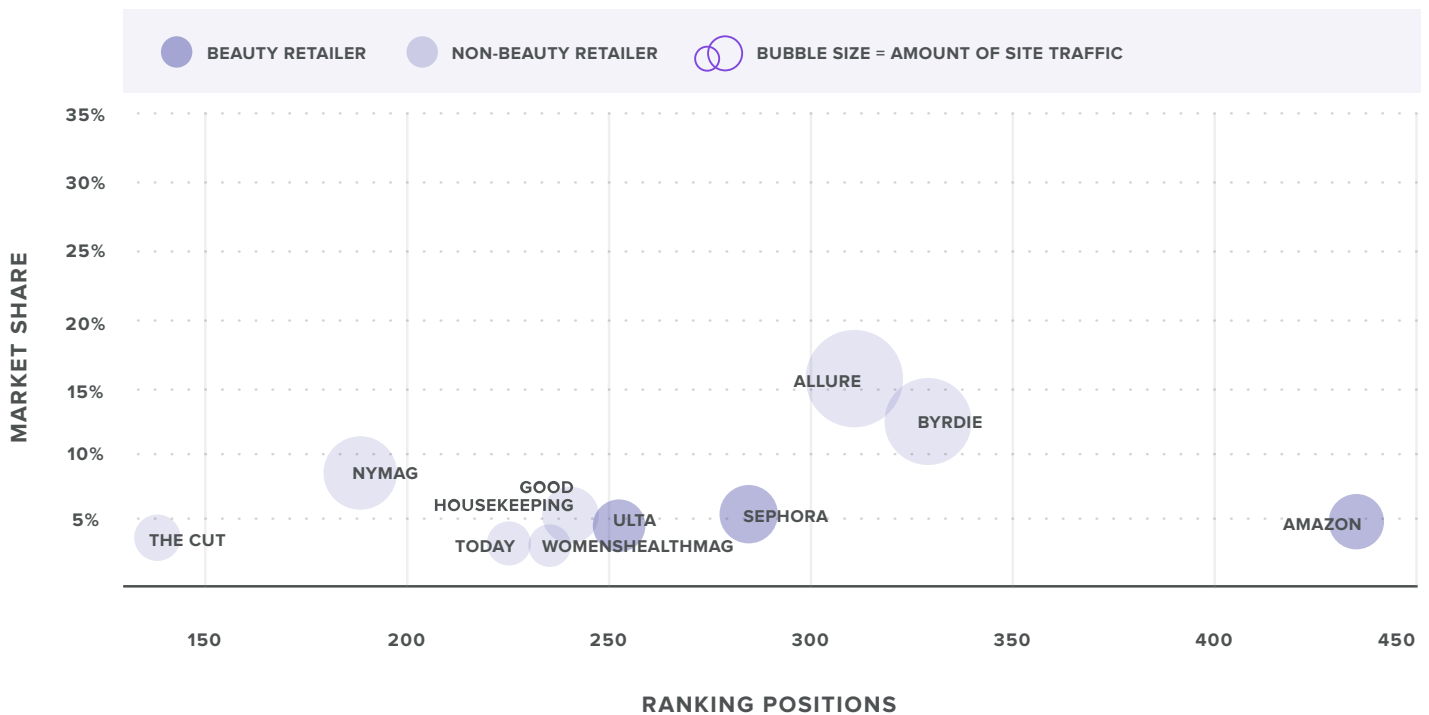
[REQUEST AN ANALYSIS](#)



Cleansers

SKINCARE: CLEANSERS

FIGURE 2



Terakeet’s analysis of the Cleansers sector of the Skincare market involved 296 high-value keywords with a total monthly Google organic search volume of 957,010.

When looking at the Cleansers sector, once again, we see many publishers and informational websites capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 20 positions in market share, 14 (70.00%) are non-beauty brands / non-beauty retailers. Together, they hold a 60.04% market share, representing 380,000+ in monthly website traffic from 2,981 rankings.

That’s approximately 4,560,000 website visits that established beauty brands offering products in the Cleanser market sector are not seeing every year.

Keep in mind that this is a fraction of the entire market of terms being searched related to Skincare and Cleansers. **When factoring in hundreds of additional, relevant Skincare and Cleanser keywords instead, the organic traffic being lost annually by established beauty brands and retailers is much higher.**



Organic Search Market Share

The Google organic market share for the 296 keywords examined in the Cleansers sector of the Skincare market breaks down as follows:

MARKET SHARE: CLEANSERS	
COMPANY	MARKET SHARE
allure.com	15.20
byrdie.com	12.03
nymag.com	8.25
sephora.com	5.14
goodhousekeeping.com	5.06
amazon.com	4.60
ulta.com	4.31
thecut.com	3.40
today.com	2.99
womenshealthmag.com	2.83
neutrogena.com	2.41
ipsy.com	2.30
cosmopolitan.com	2.29
healthline.com	1.79
prevention.com	1.56
bestproducts.com	1.35
glamour.com	1.06
dermstore.com	0.89
elle.com	0.89
harpersbazaar.com	0.80



KEY:

- Non-Beauty Retailer
- Beauty Retailer

70%

of the top ranking sites for **Cleansers** are **non-beauty retailers**

Given that the top 10 beauty brands in the world are worth more than \$65 billion combined, it's surprising that these established brands are not able to compete more effectively for these highly valuable keywords. To lose out on approximately 4,560,000 site visitors annually for merely a subsection of keywords (and millions of additional site visitors when extrapolating across the entire Cleanser keyword landscape) is a lost opportunity that these companies otherwise have the resources to achieve.



Product vs. Informational Keywords

Searches for informational keywords lead to Google results featuring content such as beauty guides, tutorials, and makeup tips. The search intent is to find or discover content, information, or answers. Non-branded product keywords drive product-specific Google results and point-of-purchase marketing. The search intent is to find a certain type of product (and in many cases to purchase that product), although the searcher has not indicated a brand preference.

Of the 296 keywords examined for the Cleanser sector, 232 keywords (78.38%) were identified as informational and 64 were product-related (21.62%). The informational keywords similarly represent 739,740 (77.30%) of the 957,010 monthly Google searches.

The top 10 keywords with the highest Google search volumes in the Cleansers sector break down as follows:

KEYWORDS: PRODUCT VS INFO	
KEYWORD	MONTHLY SEARCH VOL
cleanser	60,500
toner	49,500
face wash	49,500
cleansing oil	40,500
face cleanser	40,500
face scrub	33,100
face toner	33,100
best face wash	27,100
best facial cleanser	22,200
makeup remover	18,100

↑

KEY:

Informational

Product

ONLY
2 OUT OF **10**

of the top 10 keywords are **product-related.**

Given that informational search intent is responsible for the majority of the top ranking keywords, it would make sense for beauty brands to target informational keywords in their marketing efforts.



Informational Search

Which brands are capturing the largest share of searches with informational search intent? It's not that different from who is winning overall in the Cleanser sector.

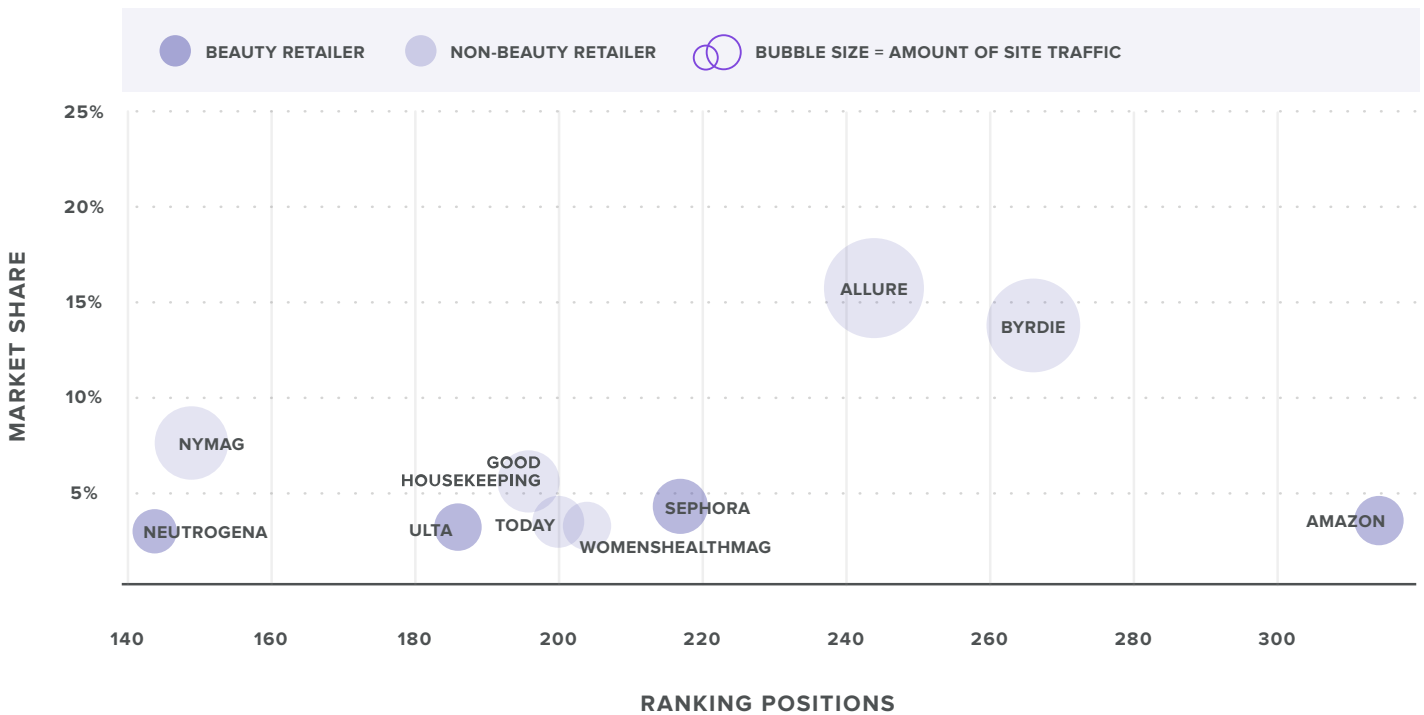
Allure leads the way with 15.67% market share followed by Byrdie.com (13.68%), Nymag.com (7.69%), Goodhousekeeping.com (5.62%), and Sephora (4.24%). Out of the top 20 market share holders, non-retailers have 63.09% of the organic market share for informational keywords.

See the data below for additional details:




SKINCARE: CLEANSERS / INFO

FIGURE 3



SKINCARE: CLEANSERS / INFO	
COMPANY	MARKET SHARE
Allure.com	13.60
Nymag.com	10.16
Thecut.com	8.47
Sephora.com	8.21
Amazon.com	8.05
Ulta.com	7.78
Byrdie.com	6.42
Goodhousekeeping.com	3.15
Ipsy.com	2.26
Cerave.com	1.97
Target.com	1.84
Dermstore.com	1.37
Womenshealthmag.com	1.31
Bustle.com	1.25
Paulaschoice.com	1.07
Walmart.com	1.06
Glamour.com	1.04
CVS.com	0.93



KEY:

Non-Beauty Retailer

Beauty Retailer

MORE THAN
50%

of the top ranking
Skincare Cleansers
results are going to
non-beauty retailers



Product Search

In comparison, the Google organic market share for product-related keywords, again representing 217,270 monthly searches, includes more beauty brands and retailers than the informational keywords. This makes sense, given the product-focused nature of their businesses.

However, it may be surprising for those in the industry to see so many publishers, non-beauty brands, and non-beauty retailers as well capturing a sizable percentage of market share for these types of searches. In fact, the top three market share holders, and five of the top eight, are non-beauty brands and non-beauty retailers. And overall, the publishers, non-beauty brands, and non-beauty retailers are capturing 45.40% of the available searches for these product keywords.

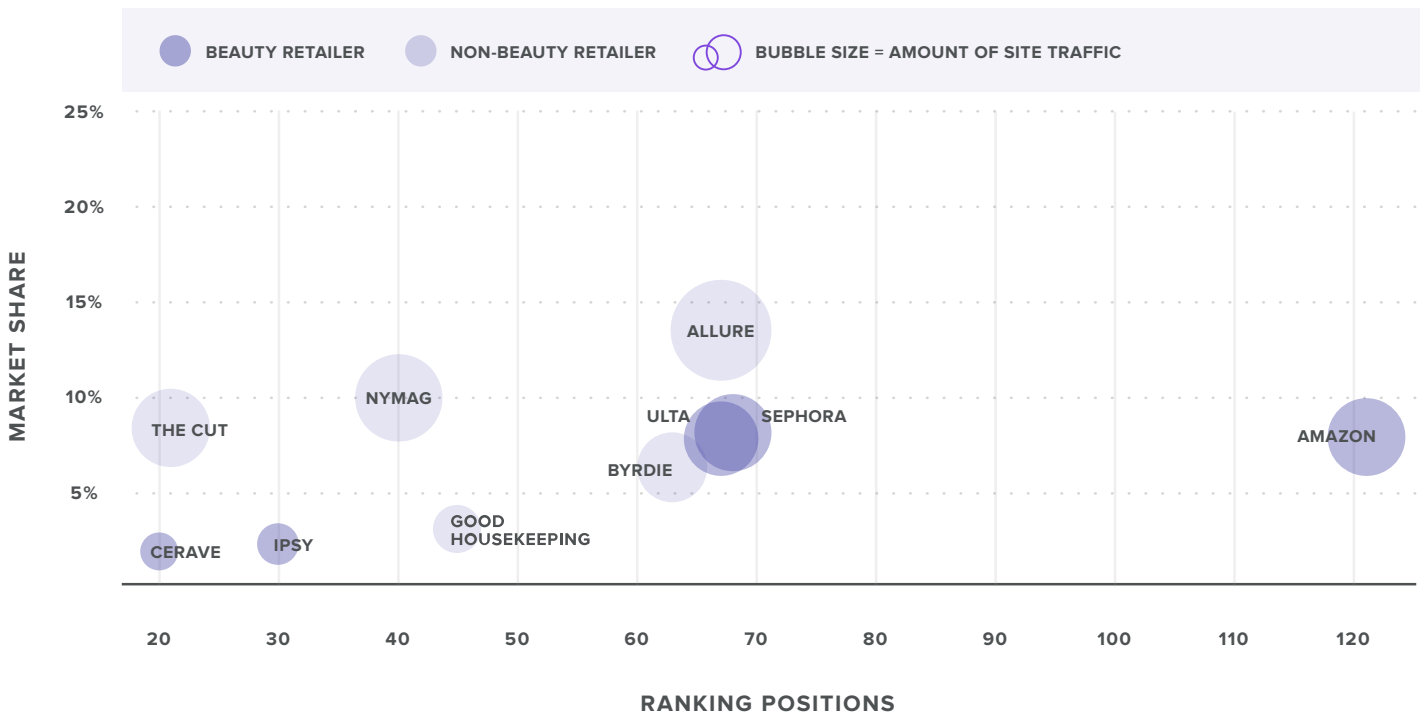
That’s close to half of all the Cleanser product-focused searches going to non-beauty brands and non-beauty retailers.

For every search that these websites capture, there’s a greater volume of lost revenue among the beauty brands and retailers. As noted earlier, it’s surprising that companies with such vast resources are allowing so much organic market share to go to those who are not even selling beauty products.


So, which beauty brands and retailers are capturing the most Google market share for product-related keywords?

SKINCARE: CLEANSERS / PRODUCT

FIGURE 4



SKINCARE: CLEANSERS / PRODUCT	
COMPANY	MARKET SHARE
Allure.com	15.67
Byrdie.com	13.68
Nymag.com	7.69
Goodhousekeeping	5.62
Sephora.com	4.24
Today.com	3.73
Amazon.com	3.59
Ulta.com	3.28
Womenshealthmag.com	3.28
Neutrogena.com	3.05
Cosmopolitan.com	2.79
Ipsy.com	2.31
Healthline.com	2.11
Thecut.com	1.91
Prevention.com	1.84
Bestproducts.com	1.71
Glamour.com	1.06
Elle.com	1.01
Harpersbazaar.com	0.99
Dermstore.com	0.75



KEY:

Non-Beauty Retailer

Beauty Retailer

Compare to Paid Search Costs

Understanding that many beauty brands turn to paid search to compete in the search engines, let's examine what it would cost to try to compete for those 4,560,000 lost site visitors mentioned previously in the Cleanser space.

Assuming an average cost-per-click of \$1.50 to \$3, capturing this traffic through paid search would cost \$6.8 to \$13.7 million annually.

And again, extrapolated across the larger keyword landscape, the cost would be higher. Clearly, it's beneficial to secure as many of these searches through organic search as possible. The cost-per-lead via organic search would be a fraction of that of paid search.

Market Share Trends

Terakeet examined pre-pandemic through post-pandemic (February 2019 - February 2021) market share trends. During that period, Ulta.com went from having the second largest market share (behind publisher Allure.com) to the seventh, losing 6.63 percentage points in share in the process. During the same period, Sephora fell from 7.03% to 5.14%. Even Amazon dropped from the fourth highest market share to the sixth.

Conversely, publishers and blogs have snatched up an eye-popping amount of market share through the pandemic. Allure increased its share from 11.81% to 15.20%, while Byrdie skyrocketed from 4.09% to 12.03%, Nymag.com went from 3.43% to 8.25%, and Goodhousekeeping.com climbed from 0.42% to 5.06%.

The common thread here is that beauty publishers and blogs are winning a larger share of organic search over time and outranking the established beauty retailers in Google. Search terms which were previously transactional have taken on a more informational intent, and Google is rewarding websites that publish informational content accordingly.



Conclusion

In the Cleansers sector of the Skincare market, many beauty publications and other non-beauty brands and non-beauty retailers are capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 20 positions in market share for the 296 high-value keywords analyzed, 14 are non-beauty brands / non-retailers. Together, they hold a 60.04% market share, representing 380,000+ in monthly website traffic.

As mentioned earlier, that's approximately 4,560,000 website visits that established beauty brands and retailers offering Cleanser products are not seeing every year. When factoring in hundreds of additional, relevant Skincare and Cleanser keywords, the organic traffic being lost annually by established beauty brands and retailers is much higher.

Even when looking exclusively at product-focused keywords for which one would expect beauty brands and retailers to dominate in Google, publishers and other websites that do not even sell beauty products are capturing 45.4% of the Google organic market share — close to half of all the corresponding search traffic.

There's a market opportunity to attract millions of site visitors actively seeking Cleanser products and related information via Google.



Beauty brands offering products within the Cleansers sector need to consider the entire competitive landscape, and not only traditional offline competitors, when approaching organic search. By better understanding the competitive landscape, established beauty brands can compete against beauty publishers and informational websites more effectively and secure more site traffic, orders, and customers.

Get a Custom Analysis

Interested in understanding your organic search market share and seeing how you compare to your competitors?

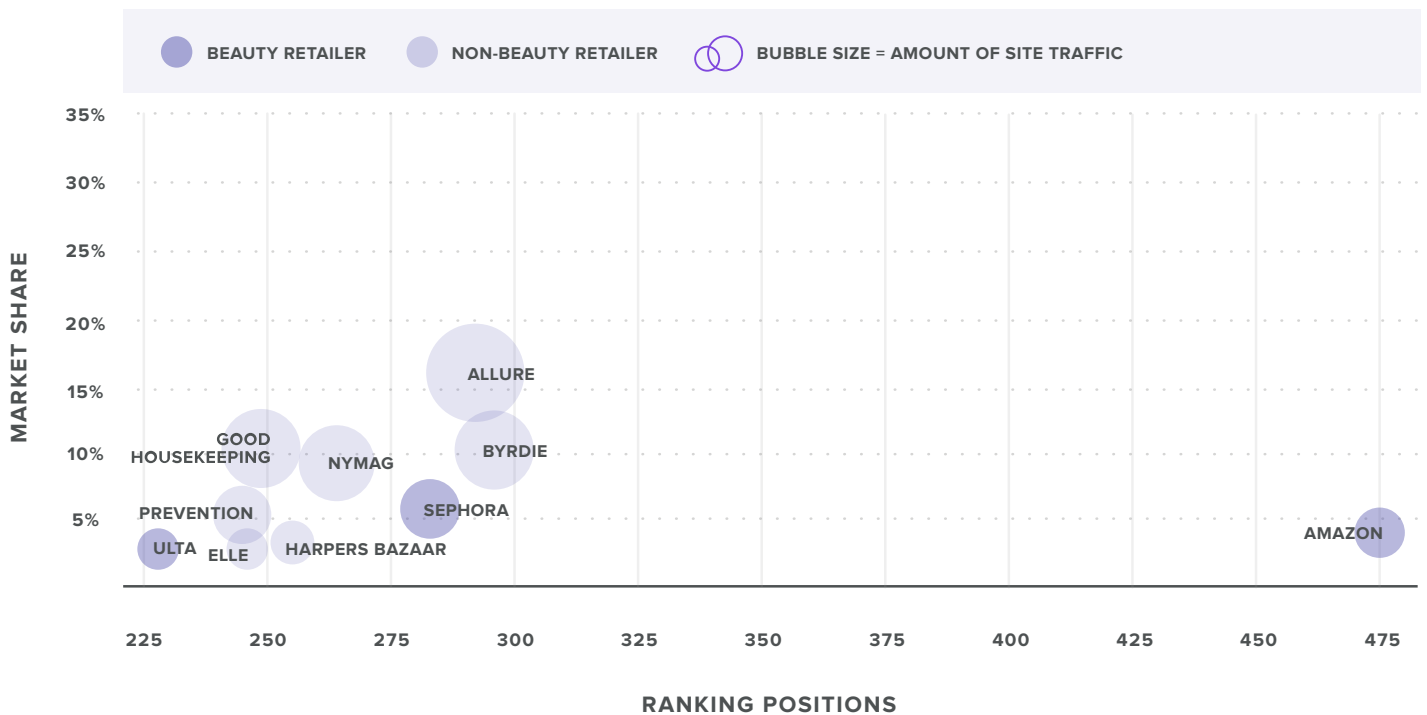
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Skincare

Moisturizers

SKINCARE: MOISTURIZERS

FIGURE 5



Terakeet’s analysis of the Moisturizers sector of the Skincare market involved 277 high-value keywords with a total monthly Google organic search volume of 529,330.

When looking at the Moisturizers sector, once again, we see many publishers and informational websites capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 19 positions in market share, 15 (78.95%) are non-beauty brands / non-beauty retailers. Together, they hold a 68.82% Google organic search market share, representing more than 243,000 in monthly website traffic from 3,171 keyword rankings.

That’s approximately 2.92 million website visits that established beauty brands offering products in the Moisturizers market sector are not seeing every year.

Keep in mind that this is a fraction of the entire market of terms being searched related to Skincare and Moisturizers. **When factoring in hundreds of additional, relevant Skincare and Moisturizer keywords instead, the organic traffic being lost annually by established beauty brands and retailers is much higher.**



Organic Search Market Share

The Google organic market share for the 277 keywords examined in the Moisturizer sector of the Skincare market breaks down as follows:

MARKET SHARE: MOIISTURIZERS	
COMPANY	MARKET SHARE
allure.com	15.81
goodhousekeeping.com	10.11
byrdie.com	9.99
nymag.com	9.05
sephora.com	5.65
prevention.com	5.15
amazon.com	3.86
harpersbazaar.com	3.14
elle.com	2.70
ulta.com	2.66
healthline.com	2.66
instyle.com	2.43
vogue.com	1.67
thecut.com	1.65
oprahmag.com	1.53
dermstore.com	1.20
glamour.com	1.07
health.com	0.99
Wikipedia	0.87



KEY:

- Non-Beauty Retailer
- Beauty Retailer

NEARLY
80%

of the organic market share for the **Moisturizer** sector is going to **non-beauty retailers**

Given that the top 10 beauty brands in the world are worth more than \$65 billion combined, it's surprising that these established brands are not able to compete more effectively for these highly valuable keywords. To lose out on approximately 2.92 million site visitors annually for merely a subsection of keywords (and millions of additional site visitors when extrapolating across the entire Moisturizer keyword landscape) is a lost opportunity that these companies otherwise have the resources to achieve.



Product vs. Informational Keywords

Of the 277 keywords examined for the Moisturizer sector, 251 keywords (90.61%) were identified as informational and 26 were product-related (9.39%). The informational keywords similarly represent 379,590 (71.71%) of the 529,330 monthly Google searches.

KEYWORDS: PRODUCT VS INFO

KEYWORD	MONTHLY SEARCH VOL
moisturizer	60,500
best face moisturizer	40,500
best moisturizer	33,100
face moisturizer	33,100
best moisturizer for dry skin	22,200
face cream	14,800
best face moisturizer for dry skin	9,900
best night cream	9,900
face lotion	9,900
moisturizer for dry skin	8,100



KEY:

Informational
Product

ONLY
4 OUT OF **10**

of the top 10 keywords are product-related.

Given that informational search intent is responsible for the majority of the top ranking keywords, it would make sense for beauty brands to target informational keywords in their marketing efforts beyond product keywords.





Informational Search

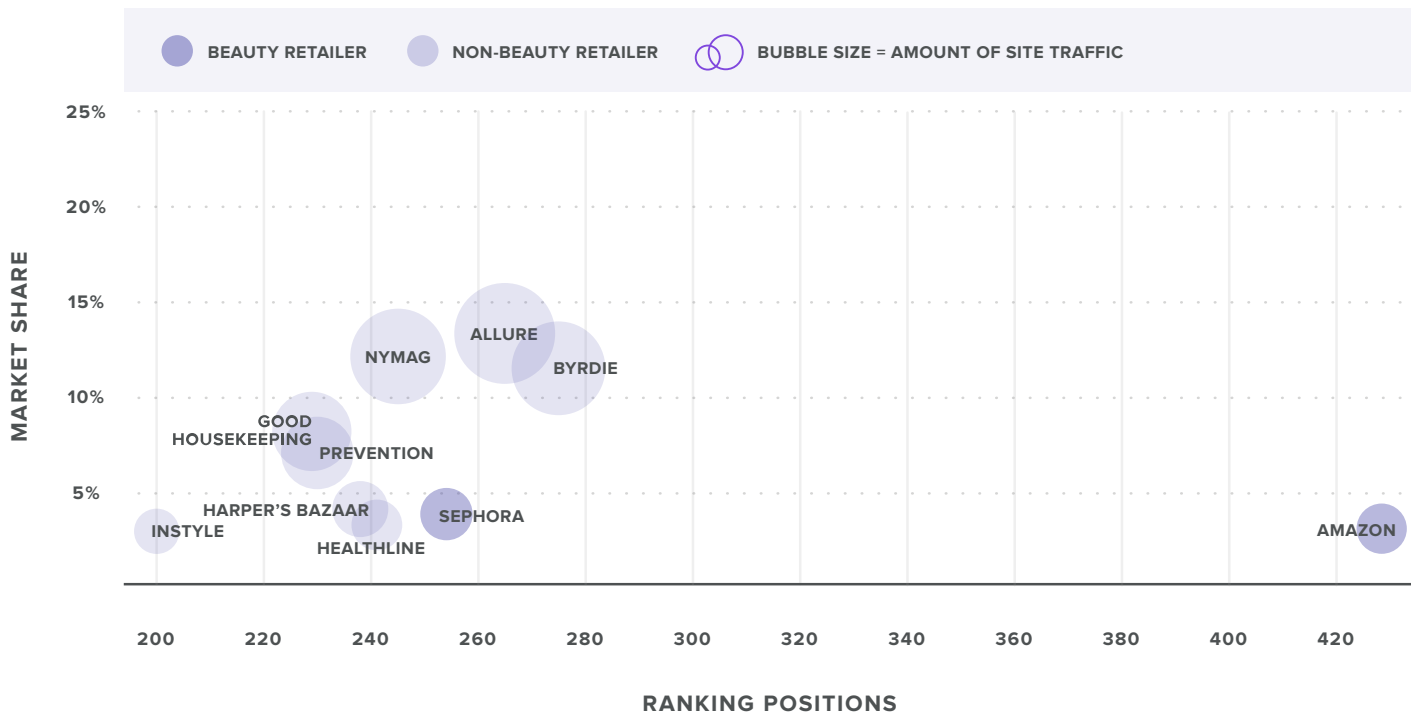
Which brands are capturing the largest share of searches with informational search intent? It's not that different from who is winning overall in the Moisturizer sector.

Allure leads the way with 13.43% market share followed by Nymag.com (12.16%), Byrdie (11.69%), Goodhousekeeping.com (8.3%), and Prevention.com (7.11%). Out of the top 19 market share holders, non-retailers have 74.01% of the organic market share for informational keywords.

See the data below for additional details:

SKINCARE: MOISTURIZERS / INFO

FIGURE 6



SKINCARE: MOISTURIZERS / INFO

COMPANY	MARKET SHARE
Allure.com	13.43
Nymag.com	12.16
Byrdie.com	11.69
Goodhousekeeping.com	8.3
Prevention.com	7.11
Harpersbazaar.com	4.26
Sephora.com	3.8
Healthline.com	3.28
Womenshealthmag.com	3.28
Amazon.com	3.24
InStyle.com	2.96
Vogue.com	2.14
Oprahmag.com	1.97
Thecut.com	1.78
Glamour.com	1.41
Health.com	1.38
Elle.com	1.3
Ulta.com	1.04
Marieclaire.com	0.9
Cosmopolitan.com	0.9

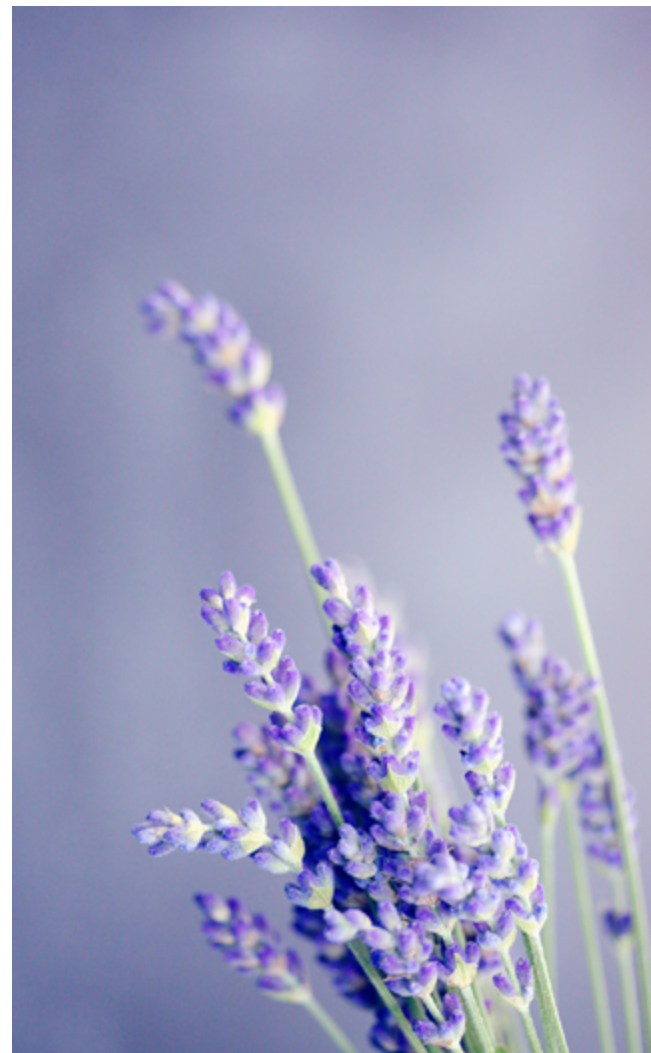


KEY:

- Non-Beauty Retailer
- Beauty Retailer

85%

of the top ranking Skincare Moisturizer results are going to non-beauty retailers



Product Search

In comparison, the Google organic market share for product-related keywords, again representing 149,740 monthly searches, includes more beauty brands and retailers than the informational keywords. This makes sense, given the product-focused nature of their businesses.

However, it may be surprising for those in the industry to see so many publishers, non-beauty brands, and non-beauty retailers as well capturing a sizable percentage of market share for these types of searches. In fact, the top two market share holders, and four of the top six, are non-beauty brands and non-beauty retailers. And overall, the publishers, non-beauty brands, and non-beauty retailers are capturing 56.14% of the available searches for these product keywords.

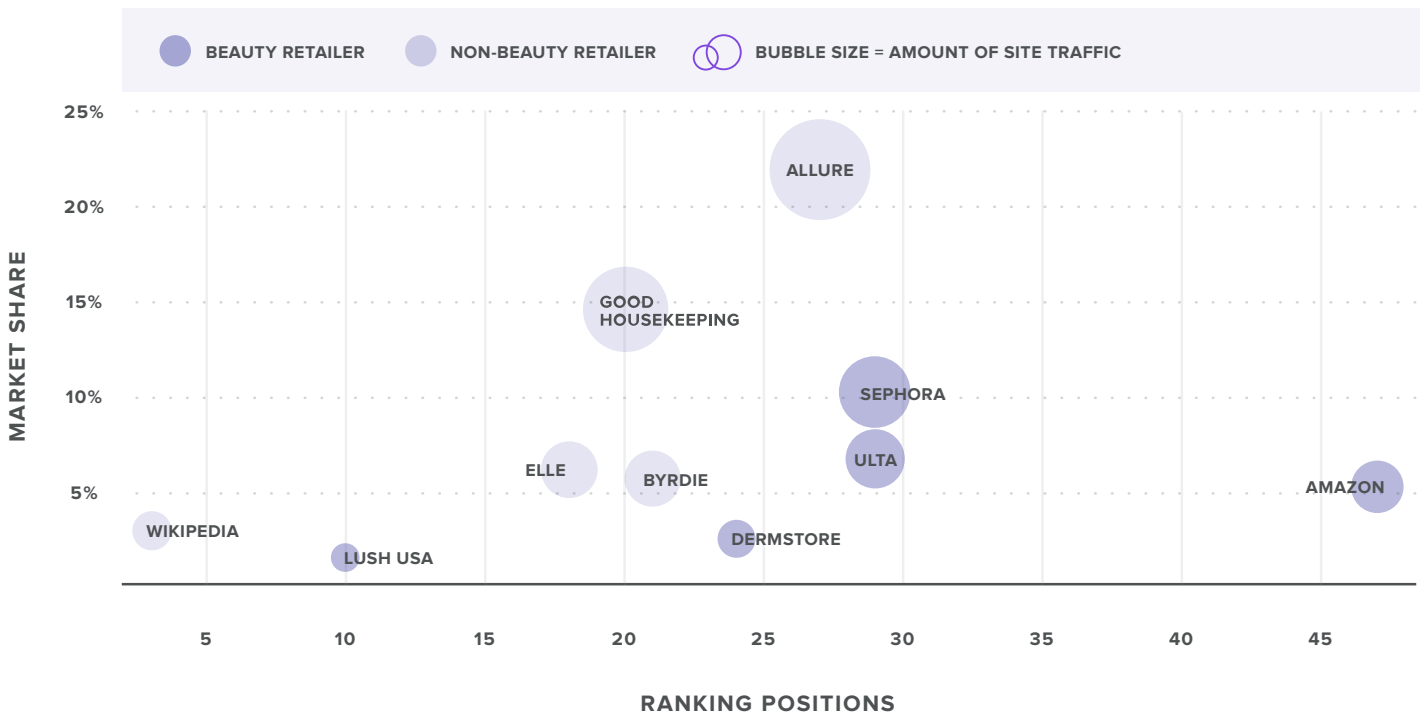
That’s more than half of all the Moisturizer product-focused searches going to non-beauty brands and non-beauty retailers.

For every search that these websites capture, there’s a greater volume of lost revenue among the beauty brands and retailers. As noted earlier, it’s surprising that companies with such vast resources are **allowing so much organic market share to go to those who are not even selling beauty products.**

So, which beauty brands and retailers are capturing the most Google market share for product-related keywords? See the data as follows:

SKINCARE: MOISTURIZERS / PRODUCT

FIGURE 7



SKINCARE: MOISTURIZERS / PRODUCT

COMPANY	MARKET SHARE
Allure.com	21.85
Goodhousekeeping.com	14.68
Sephora.com	10.36
Ulta.com	6.76
Elle.com	6.24
Byrdie.com	5.69
Amazon	5.43
Wikipedia	3.03
Dermstore.com	2.61
Lushusa.com	1.59
Kiehls.com	1.41
Thecut.com	1.32
Nymag.com	1.16
Neutrogena.com	1.15
Healthline.com	1.07
InStyle.com	1.1
Paulaschoice.com	0.95
Cerave.com	0.77



KEY:

Non-Beauty Retailer
Beauty Retailer

Compare to Paid Search Costs

Understanding that many beauty brands turn to paid search to compete in the search engines, let's examine what it would cost to try to compete for those 2.92 million lost site visitors mentioned previously in the Moisturizer space. Assuming an average cost-per-click of \$1.50 to \$2.50, capturing this traffic through paid search would cost \$4.4 million to \$7.3 million annually.

And again, extrapolated across the larger keyword landscape, the cost would be higher. Clearly, it's beneficial to secure as many of these searches through organic search as possible. The cost-per-lead via organic search would be a fraction of that of paid search.

Market Share Trends

When looking at the product and informational keywords within the Moisturizer sector, Sephora experienced the greatest loss in organic search market share from the two-year period of February 2019 through February 2021. Whereas Sephora had the second highest market share (12.03%) in February 2019, its positioning dropped to fifth (behind Allure.com, Goodhousekeeping.com, Byrdie.com and Nymag.com) and its market share was cut by more than half (down to 5.65%) by the end of this period. Even Amazon fell in market share from 4.89% to 3.86%, dropping from the third-highest market share to the seventh.

Conversely, beauty publisher **Byrdie began 2019 with less than 1% market share for the Moisturizer sector. By February 2021, they increased their market share by 12X** and held 9.99% market share, ahead of Sephora, Amazon, and Ulta.

The common thread here is that beauty publishers and blogs are winning a larger share of organic search over time and outranking the established beauty retailers in Google. Similarly to the Cleanser sector, the Moisturizer sector is experiencing a shift in search intent as Google is favoring informational content in the SERPs over product-related, transactional web pages.

BYRDLE CASE STUDY:

How the Beauty Blog Increased Google Organic Market Share by 12X to Outrank Competitors.

[VIEW CASE STUDY](#)

Conclusion

In the Moisturizer sector of the Skincare market, many beauty publications and other non-beauty brands and non-beauty retailers are capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 20 positions in market share for the 277 high-value keywords analyzed, 15 are non-beauty brands / non-beauty retailers. Together, they hold a 68.82% Google organic search market share, representing more than 243,000 in monthly website traffic from 3,171 keyword rankings.

As mentioned earlier, that's approximately 2.92 million website visits that established beauty brands and retailers offering Moisturizer products are not seeing every year. When factoring in hundreds of additional, relevant Skincare and Moisturizer keywords, the organic traffic being lost annually by established beauty brands and retailers is much higher.

Even when looking exclusively at product-focused keywords for which one would expect beauty brands and retailers to dominate in Google, publishers and other websites that do not even sell beauty products are capturing 56.14% of the Google organic market share — more than half of all the corresponding search traffic.



There's a market opportunity to attract millions of site visitors actively seeking Moisturizer products and related information via Google. Beauty brands offering products within the Moisturizer sector need to consider the entire competitive landscape, and not only traditional offline competitors, when approaching organic search. By better understanding the competitive landscape, established beauty brands can compete against beauty publishers and informational websites more effectively and secure more site traffic, orders, and customers.

Get a Custom Analysis

Interested in understanding your organic search market share and seeing how you compare to your competitors?

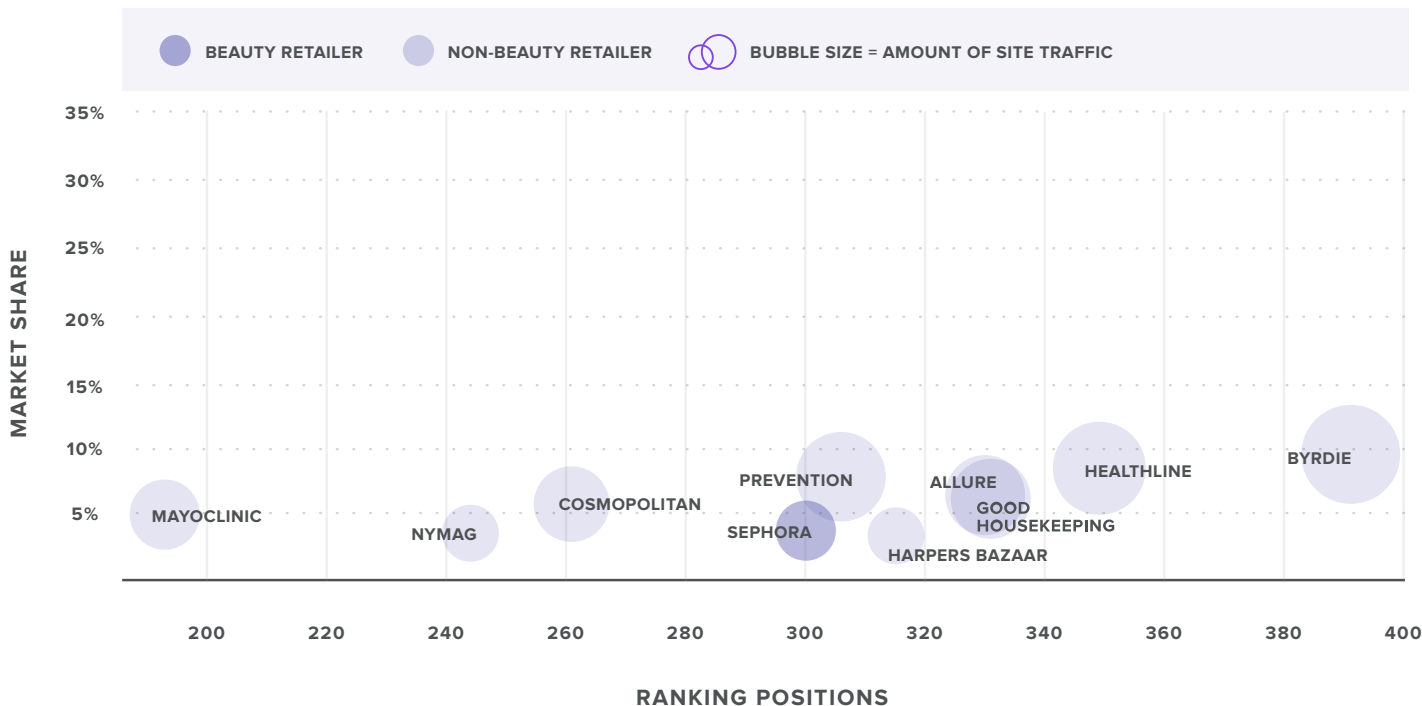
[REQUEST AN ANALYSIS](#)

Skincare

Anti-Aging

SKINCARE: ANTI-AGING

FIGURE 8



Terakeet's analysis of the Anti-Aging sector of the Skincare market involved 341 high-value keywords with a total monthly Google organic search volume of 726,900.

When looking at the Anti-Aging sector, once again, we see many publishers and informational websites capturing a significant percentage of the Google organic search market share. We also see a number of medical websites appearing in the Google search results. Among the organizations occupying the top 20 positions in market share, 16 (80%) are non-beauty brands / non-beauty retailers along with medical and health-focused websites. Together, they hold a 67.02% market share, representing 325,000+ in monthly website traffic from 4,053 rankings.

That's approximately 2.92 million website visits that established beauty brands offering products in the Moisturizers market sector are not seeing every year..

Keep in mind that this is a fraction of the entire market of terms being searched related to Skincare and Anti-Aging. **When factoring in hundreds of additional, relevant Skincare and Anti-Aging keywords instead, the organic traffic being lost annually by established beauty brands and retailers is much higher.**



Organic Search Market Share

The Google organic market share for the 341 keywords examined in the Anti-Aging sector of the Skincare market breaks down as follows:

MARKET SHARE: ANTI-AGING	
COMPANY	MARKET SHARE
byrdie.com	9.26
healthline.com	8.23
prevention.com	7.61
allure.com	6.19
goodhousekeeping.com	5.89
cosmopolitan.com	5.51
mayoclinic.org	4.7
sephora.com	3.54
nymag.com	3.33
harpersbazaar.com	3.14
today.com	3.11
hopkinsmedicine.org	2.11
thecut.com	2.08
Amazon	1.99
ipsy.com	1.94
WebMD	1.81
ulta.com	1.54
townandcountrymag.com	1.38
marieclaire.com	1.36
oprahmag.com	1.31

↑

KEY:

Non-Beauty Retailer
Beauty Retailer

80%

of the top ranking sites for Skincare
Anti-aging are non-beauty retailers

Given that the top 10 beauty brands in the world are worth more than \$65 billion combined, it's surprising that these established brands are not able to compete more effectively for these highly valuable keywords. To lose out on approximately 3,900,000 site visitors annually for merely a subsection of keywords (and millions of additional site visitors when extrapolating across the entire Anti-Aging keyword landscape) is a lost opportunity that these companies otherwise have the resources to achieve.



Product vs. Informational Keywords

Searches for informational keywords primarily lead to Google results featuring content such as listicles and other blog posts, guides, how-to videos, and health tips. The search intent is to find or discover content, information, or answers. Non-branded product keywords drive product-specific Google results and point-of-purchase marketing. The search intent is to find a certain type of product (and in many cases to purchase that product), although the searcher has not indicated a brand preference.

Of the 341 keywords examined for the Anti-Aging sector, 323 keywords (94.72%) were identified as informational and 18 were product-related (5.28%). The informational keywords similarly represent 707,190 (97.29%) of the 726,900 monthly Google searches.

The top 10 keywords with the highest Google search volumes in the Anti-Aging sector break down as follows, with all 10 being informational in intent:

KEYWORDS: PRODUCT VS INFO	
KEYWORD	MONTHLY SEARCH VOL
best eye cream	49,500
how to get rid of bags under eyes	40,500
eye cream	27,100
best eye cream for dark circles	22,200
best under eye cream	14,800
best wrinkle cream	14,800
eye cream for dark circles	14,800
forehead wrinkles	14,800
anti aging cream	12,100
best eye cream for wrinkles	12,100



KEY:
Informational
Product

THE TOP
31

keywords with the highest search-volume in the **Anti-Aging** sector are all information-related.

Given that informational search intent underlies the top ranking keywords, it would make sense for beauty brands to target informational keywords in their marketing efforts.



Informational Search

Which brands are capturing the largest share of searches with informational search intent? It's not that different from who is winning overall in the Anti-Aging sector.

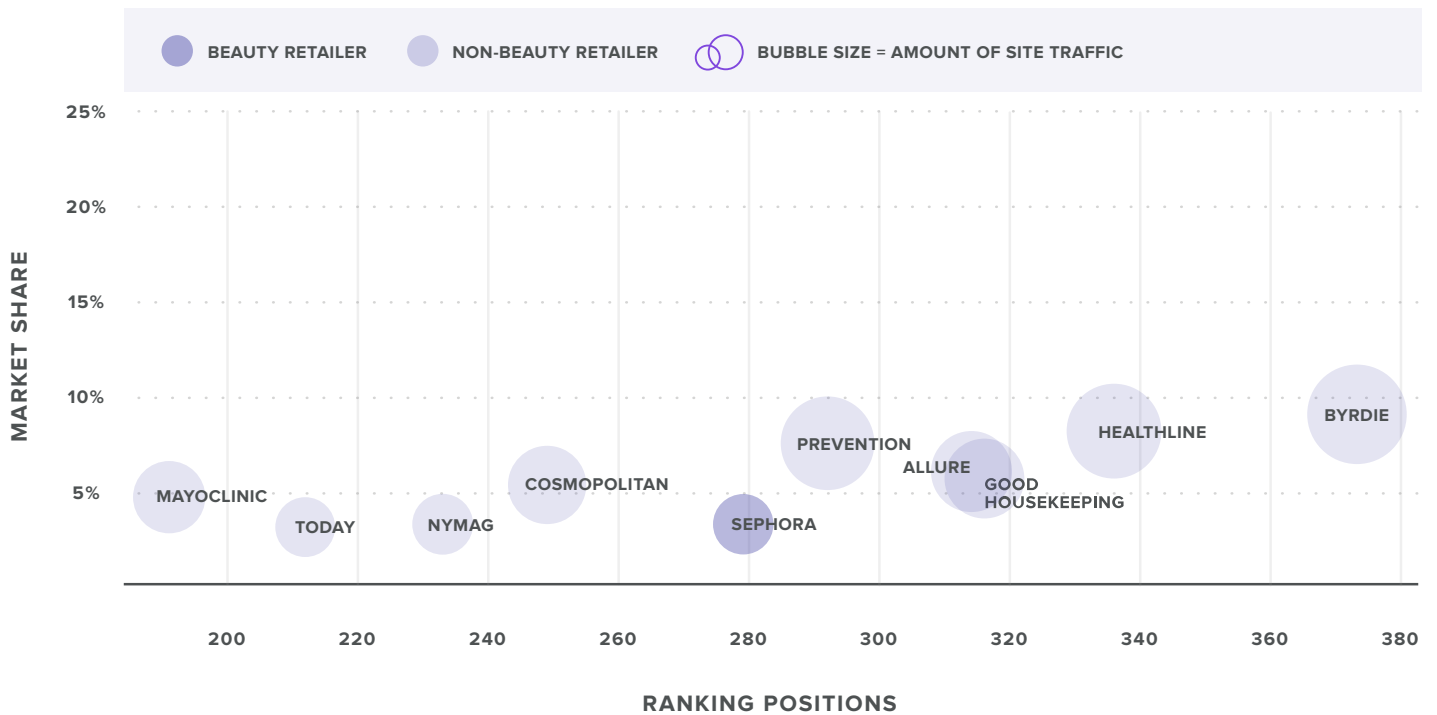
Byrdie leads the way with 9.21% market share followed by Healthline (8.44%), Prevention.com (7.73%), Allure (6.32%), and Goodhousekeeping.com (5.91%). Out of the top 20 market share holders, non-beauty brands and non-beauty retailers (including medical and health-focused websites) have 67.87% of the organic market share for informational keywords.

See the data below for additional details:



SKINCARE: ANTI-AGING / INFO

FIGURE 9



SKINCARE: ANTI-AGING / INFO

COMPANY	MARKET SHARE
byrdie.com	9.21
healthline.com	8.44
prevention.com	7.73
allure.com	6.32
goodhousekeeping.com	5.91
cosmopolitan.com	5.51
mayoclinic.org	4.83
nymag.com	3.37
sephora.com	3.37
today.com	3.18
harpersbazaar.com	3.17
hopkinsmedicine.org	2.16
thecut.com	2.12
ipsy.com	1.96
WebMD	1.84
Amazon	1.6
townandcountrymag.com	1.41
marieclaire.com	1.4
ulta.com	1.35
oprahmag.com	1.27



KEY:

Non-Beauty Retailer
Beauty Retailer

80%

of the top ranking
Skincare Anti-Aging
results are going to
non-beauty retailers



Product Search

In comparison, the Google organic market share for product-related keywords, again representing 19,710 monthly searches, includes more beauty brands and retailers than the informational keywords. This makes sense, given the product-focused nature of their businesses.

For every search that these websites capture, there's a greater volume of lost revenue among the beauty brands and retailers. As noted earlier, it's surprising that companies with such vast resources are allowing so much organic market share to go to those who are not even selling beauty products.

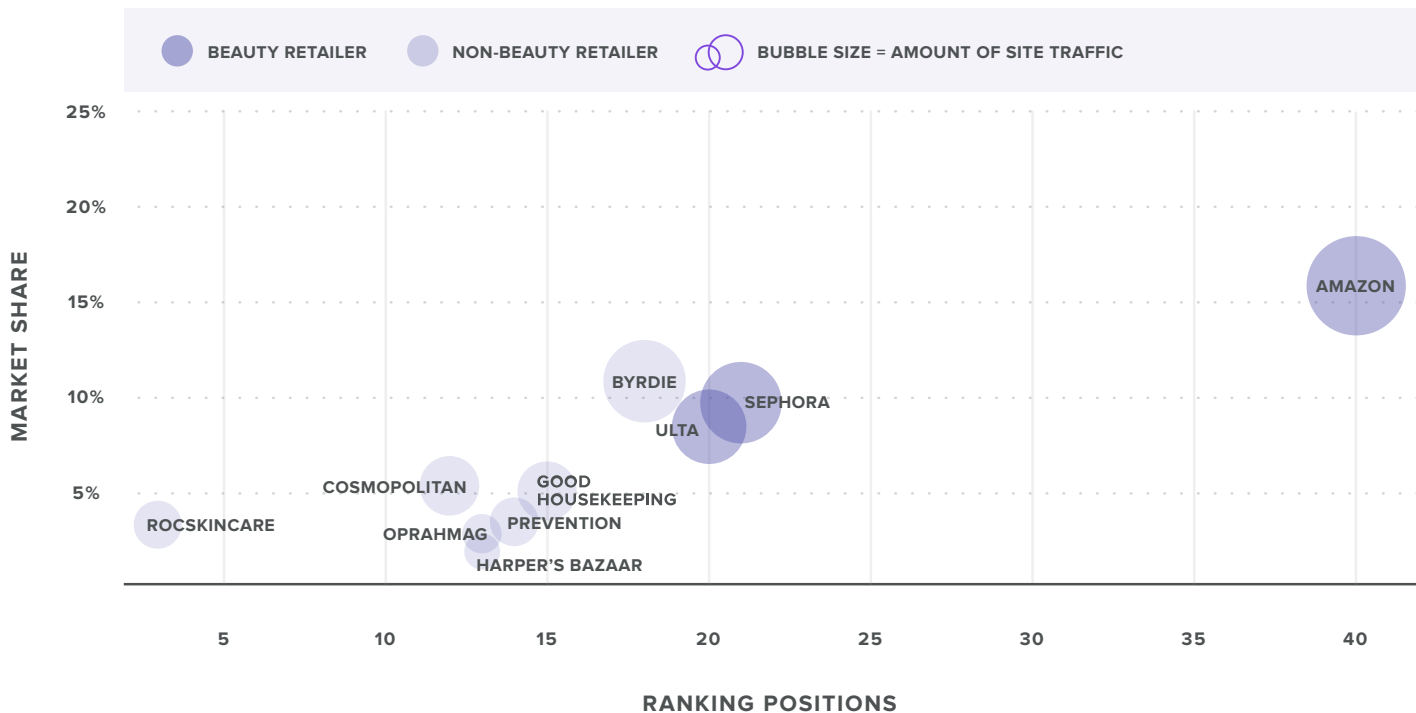
8 of the top 12 are non-beauty brands and non-beauty retailers

However, it may be surprising for those in the industry to see so many publishers, non-beauty brands, and non-beauty retailers as well capturing a sizable percentage of market share for these types of searches. In fact, 8 of the top 12 are non-beauty brands and non-beauty retailers. And overall, the publishers, non-beauty brands, and non-beauty retailers are capturing 38.34% of the available searches for these product keywords.

So, which beauty brands and retailers are capturing the most Google market share for product-related keywords? See the data as follows:

SKINCARE: ANTI-AGING / PRODUCT

FIGURE 10



SKINCARE: ANTI-AGING / PRODUCT	
COMPANY	MARKET SHARE
Amazon	15.98
byrdie.com	10.83
sephora.com	9.81
ulta.com	8.46
cosmopolitan.com	5.4
goodhousekeeping.com	5.21
prevention.com	3.39
rocskincare.com	3.36
oprahmag.com	2.59
harpersbazaar.com	2.1
allure.com	1.82
nymag.com	1.73
kiehls.com	1.63
mindbodygreen.com	1.34
ipsy.com	1.14
instyle.com	1.12
stylecraze.com	1.09
Target	0.94
Walmart	0.92
healthline.com	0.89
today.com	0.83

KEY:

Non-Beauty Retailer

Beauty Retailer

Compare to Paid Search Costs

Understanding that many beauty brands turn to paid search to compete in the search engines, let's examine what it would cost to try to compete for those 3.9 million lost site visitors mentioned previously in the Anti-Aging space.

Assuming an average cost-per-click of \$1.50 to \$2.50, capturing this traffic through paid search would cost \$5.85 to \$9.75 million annually.

And again, extrapolated across the larger keyword landscape, the cost would be higher. Clearly, it's beneficial to secure as many of these searches through organic search as possible. The cost-per-lead via organic search would be a fraction of that of paid search.

Market Share Trends

Terakeet examined pre-pandemic through post-pandemic (February 2019 - February 2021) market share trends in the Anti-Aging space. During that period, Sephora went from having the third largest market share to the eighth, falling from 5.54% to 3.54% in share in the process.

Conversely, publishers and blogs have snatched up an eye-popping amount of market share through the pandemic. Byrdie increased its market share 5.8X, from 1.59% to 9.26%, capturing the number one market share position in the process. Healthline went from 5.30% to 8.23%, going from fourth in market share to second, while Prevention.com climbed from 1.24% to 7.61%, going from ninth in market share to third.

The common thread here is that beauty and health publishers and blogs are winning a larger share of organic search over time and outranking the established beauty brands and retailers in Google. Search terms which were previously transactional have taken on a more informational intent, and Google is rewarding websites that publish informational content accordingly.

Conclusion

In the Anti-Aging sector of the Skincare market, many beauty and health publications and other non-beauty brands and non-beauty retailers are capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 20 positions in market share for the 341 high-value keywords analyzed, 16 are non-beauty brands / non-retailers. Together, they hold a 67.02% market share, representing 325,000+ in monthly website traffic.

As mentioned earlier, that's approximately 3.9 million website visits that established beauty brands and retailers offering Anti-Aging products are not seeing every year. When factoring in hundreds of additional, relevant Skincare and Anti-Aging keywords, the organic traffic being lost annually by established beauty brands and retailers is much higher.

Even when looking exclusively at product-focused keywords for which one would expect beauty brands and retailers to dominate in Google, publishers, medical, and other websites that do not even sell beauty products are capturing 38.34% of the Google organic market share.

There's a market opportunity to attract millions of site visitors actively seeking Anti-Aging products and related information via Google.



Beauty brands offering products within the Anti-Aging sector need to consider the entire competitive landscape, and not only traditional offline competitors, when approaching organic search. By better understanding the competitive landscape, established beauty brands can compete against publishers, medical sites, and informational websites more effectively and secure more site traffic, orders, and customers

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Google Market Share Report for The Beauty Industry

SECTOR 2:

Hair Care

KEY POINTS:

Publishers and blogs snatched up a large amount of Google organic market share in the Hair Care market during the pandemic and are winning a larger share of organic search over time.

The Hair Care market is experiencing a shift in search behavior, as Google is favoring informational content in the SERPs over product-related, transactional web pages, even for many non-branded product-related queries.

With a weak content portfolio, traditional beauty brands and retailers are losing a great deal of market share even on product-related searches. The one outlier is Amazon, which has performed well in the Hair Care space through the pandemic.

Outside of Amazon, beauty brands and retailers that once held a higher Google organic market share are at risk of being outranked in a short period of time.

The common thread among top-performing websites that are increasing market share is the abundance of well-organized, long-form content.

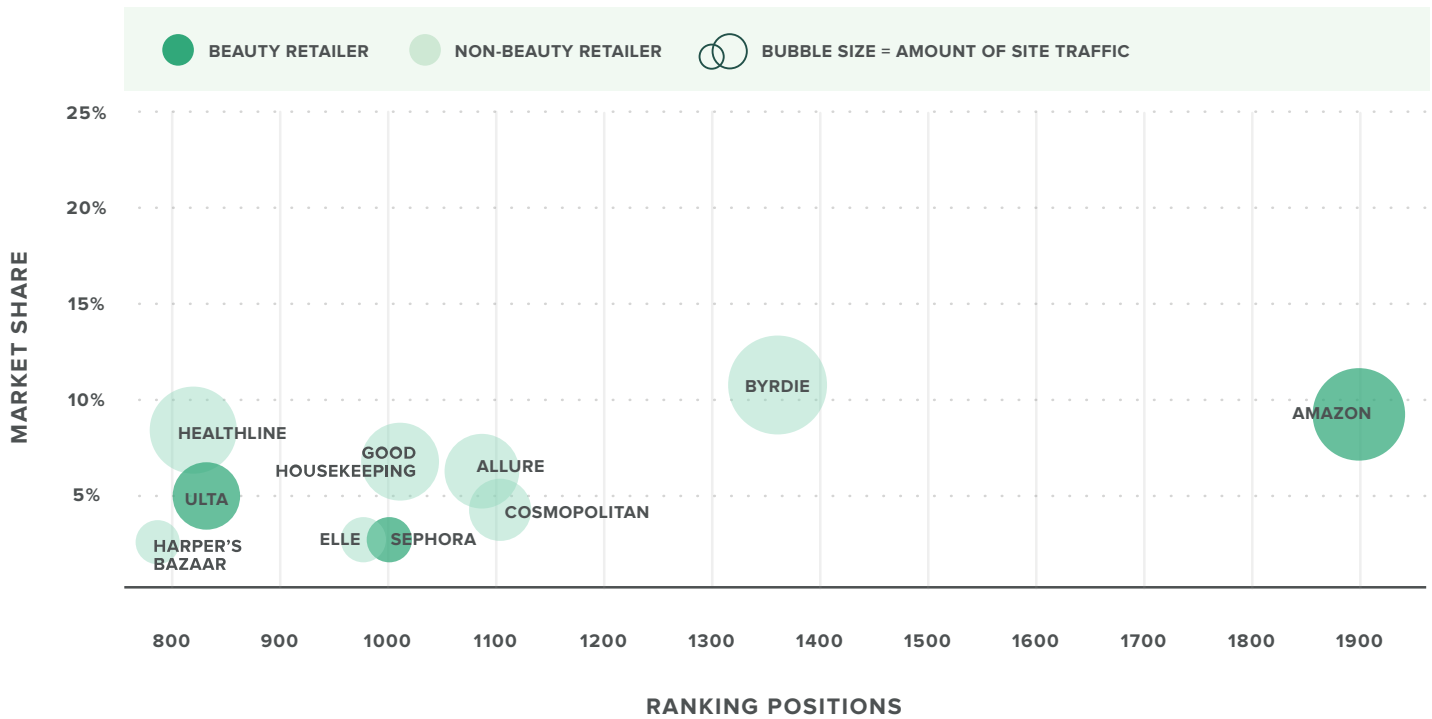


Hair Care

Google Organic Market Share Analysis

MARKET: HAIR CARE

FIGURE 11



EXECUTIVE SUMMARY

Terakeet analyzed the Google organic search landscape for the Hair Care market, including the following market sectors:

- > Styling
- > Treatments
- > Tools

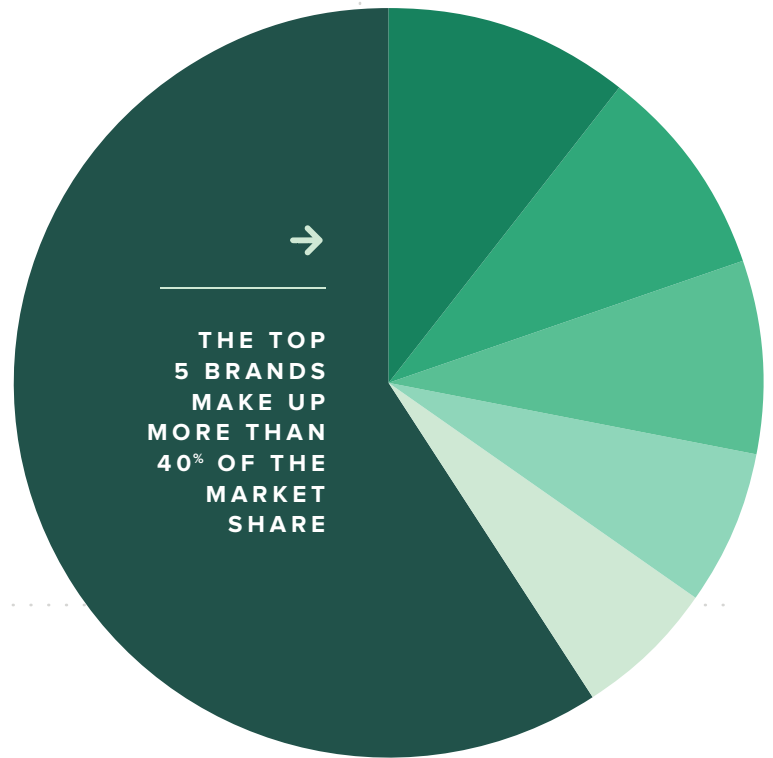
As you can see in the chart above, beauty brands and retailers are being outperformed by publishers and informational websites when looking at the search market landscape at a 10,000 foot view. In fact, 4 of the top 5 brands within the Hair Care market are publishers and hold more than 31% of the market share. Amazon is the only retailer in the top 5 at 9.16% market share. Zooming out, among the top 19 market share holders in Hair Care, 16 are publishers or informational websites, capturing 51.51% of available search traffic.



Top 5 Brands

It's one thing to understand market share. It's quite another to understand the underlying reasons why certain websites are crushing it in organic search and others are underperforming given their offline size and market presence.

To that end, we analyzed the five brands with the highest market share in Hair Care (representing more than 975,300 in monthly organic search traffic):



1

Byrdie

10.74% MARKET SHARE

- Byrdie has a wealth of long-form content
- Product review pages, gift guides, and a news section
- Over 87,700 websites pointing links at Byrdie

2

Amazon

9.16% MARKET SHARE

- Amazon has a wealth of video content and live streamed product reviews
- Curated content, gift guides, blog, and best sellers section
- Over 3 million websites pointing links at Amazon

3

Healthline

8.17% MARKET SHARE

- Healthline has a wealth of long-form content and news articles
- Interactive tools, podcasts, and featured topics section
- Over 294,000 websites pointing links at Healthline

4

Good Housekeeping

6.67% MARKET SHARE

- Good Housekeeping has a wealth of long-form content
- Interactive quizzes, product reviews, recipes, and virtual summits
- Over 94,000 websites pointing links at Good Housekeeping

5

Allure

6.21% MARKET SHARE

- Allure has a wealth of long-form content
- Beauty trends, product reviews, gift guides, videos, and more
- Over 43,800 websites pointing links at Allure





Half of the top 10 market share holders for product-related queries are surprisingly publishers or blogs.

Takeaways

One common thread among four of the five top-performing websites (with Amazon being the outlier) is the abundance of well-organized long-form content.

Let's look at the "Hair Care" section of Byrdie, for example. The average word count of its 10 most recent articles at the time of this writing is 1,486. Byrdie's topic area on "product reviews" boasts an average word count of 1,551. And it's not just these two sections of the site. Byrdie's long-form content is pervasive throughout the site. It's this commitment to long-form content that has helped it to capture over 10% of the Google organic search market share of the Hair Care keywords examined.

A second common thread among the top websites is that they diversify their content by offering site visitors comprehensive beauty guides, gift guides, product review pages, etc. These specialized content hubs are not only helpful to site visitors, but also act as backlink magnets. For example, the beauty section of the Good Housekeeping website has attracted more than 191,000 backlinks from more than 9,000 websites. The beauty product reviews area of the website ranks on Google page one for more than 126,000 keywords in the U.S., and has 190,000 ranking keywords overall. The area has attracted approximately 22,500 links from more than 2,100 websites. And the Hair Care area of the site boasts an additional 104,000+ links from roughly 4,300 websites.

Beauty brands that are looking to win in organic search on non-branded terms need a solid content strategy that targets shoppers throughout the decision making process. As demonstrated by the organic search market

share leaders, content volume matters, but so does depth and quality.

Product vs. Informational Search Queries

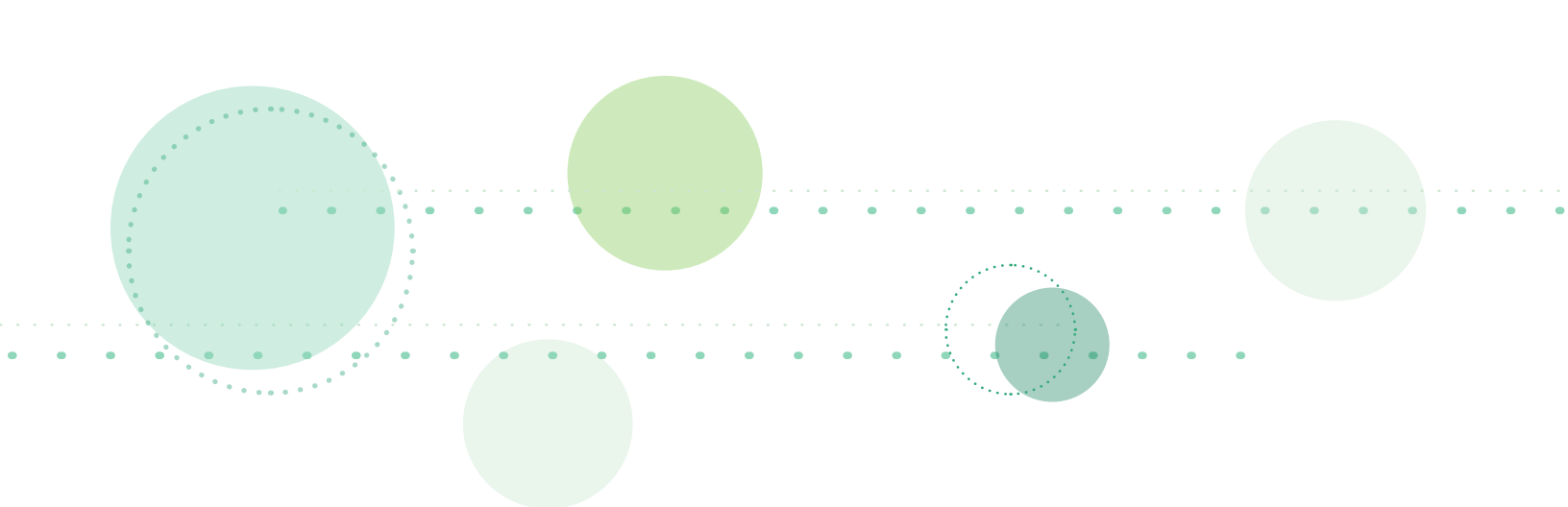
Beauty brands with a sliver of Google organic market share may believe that their poor performance applies only to informational keyword searches, where the searcher is more interested in learning something than buying something.

What Terakeet's analysis found, though, is that traditional beauty brands and retailers are losing a great deal of market share even on product-related searches, where the individual is actively seeking to purchase a certain type of product. Our analysis exclusively focused on non-branded searches, meaning that although these product-searchers had a purchase intent, they were open to finding or learning about new brands. In other words, there was no brand preference in their search.

When looking at 213 product-related keywords within the Hair Care market (representing 938,990 monthly Google searches), half of the top 10 are publishers or blogs. Overall, publishers and blogs hold 27.91% market share.

That's more than one in four of all the Hair Care product-focused searches going to non-beauty brands and non-beauty retailers.

This is a significant opportunity for beauty brands and retailers given the lifetime value of a loyal customer. Yet, online publishers and informational websites are siphoning a large volume of visitors and all the corresponding potential revenue.



Market Share Trends

Beauty brands and retailers that once held a higher Google organic market share are at risk of being outranked in a short period of time. In February 2019, Ulta had the second highest market share for the Hair Care terms examined at 7.48%. Two years later, in February 2021, Ulta's market share declined to 4.86% and the company dropped to 6th overall in Hair Care market share. The brand ranks lower than Allure, Byrdie, Healthline, and Goodhousekeeping.com — all of which are all publishers.

Conversely, beauty publishers and bloggers have been gaining a larger percent of market share over time. In February 2019, Byrdie ranked 8th overall with only 2.23% market share. Within a two-year period it jumped to 1st overall with 10.74% market share. Goodhousekeeping.com jumped from 13th to 4th overall with a 5X+ increase from 1.27% to 6.67% market share. Similarly, Healthline.com nearly tripled its market share from 6th to 3rd overall (2.96% to 8.97% market share).

Despite the gaining momentum of beauty blogs and publishers, there is one retailer that not only

continues to hold a significant amount of market share, but has managed to actually increase it from February 2019 to February 2021. Amazon is the only retailer in the top 5 of Hair Care market share holders (currently ranking 2nd), increasing its market share from 7.16% to 9.16% over the two-year period.

Why is it that so many established beauty brands and retailers are performing so poorly and yielding so much traffic and potential revenue to others? And how is Amazon capable of maintaining market share throughout this competitive yet shifting environment?

A Deeper Dive

Of course, different brands offer different products and focus on different topics, so it's important to analyze the data at a more granular level in order to fully understand the organic search performance across the Hair Care market. To that end, you can find a further breakdown of the (1) Styling, (2) Treatments, and (3) Tools sectors to follow.

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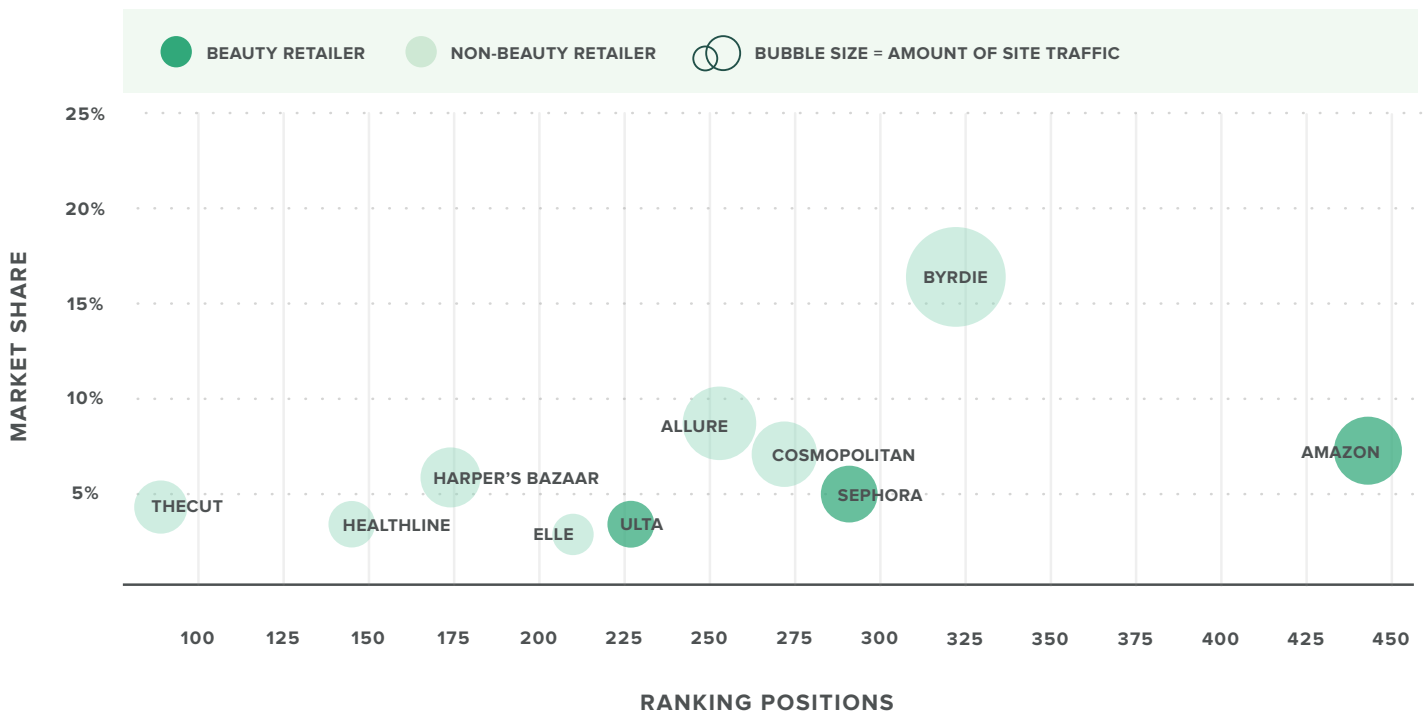


Hair Care

Styling

HAIR CARE: STYLING

FIGURE 12



Terakeet's analysis of the Styling sector of the Hair Care market involved 271 high-value keywords with a total monthly Google organic search volume of 694,700.

When looking at the Styling sector, once again, we see many publishers and informational websites capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 18 positions in market share, 14 (77.8%) are non-beauty brands / non-beauty retailers. Together, they hold a 58.71% market share, representing 272,000+ in monthly website traffic from 2,514 rankings.

That's approximately 3,264,000 website visits that established beauty brands offering products in the Styling market sector are not seeing every year.

Keep in mind that this is a fraction of the entire market of terms being searched related to Hair Care and Styling. **When factoring in hundreds of additional, relevant Hair Care and Styling keywords instead, the organic traffic being lost annually by established beauty brands and retailers is much higher.**



Organic Search Market Share

The Google organic market share for the 271 keywords examined in the Styling sector of the Hair Care market breaks down as follows:

MARKET SHARE: STYLING	
COMPANY	MARKET SHARE
byrdie.com	16.31
allure.com	8.65
amazon.com	7.11
cosmopolitan.com	6.98
harpersbazaar.com	5.76
sephora.com	4.86
thecut.com	4.20
healthline.com	3.33
ulta.com	3.28
elle.com	2.72
goodhousekeeping.com	2.03
marieclaire.com	2.02
glamour.com	1.93
naturallycurly.com	1.57
wikipedia.com	1.36
self.com	1.09
ipsy.com	1.01
nymag.com	0.76



KEY:

- Non-Beauty Retailer
- Beauty Retailer

MORE THAN
85%

of the top ranking sites for Hair Care Styling are non-beauty retailers

Given that the top 10 beauty brands in the world are worth more than \$65 billion combined, it's surprising that these established brands are not able to compete more effectively for these highly valuable keywords. To lose out on approximately 3,264,000 site visitors annually for merely a subsection of keywords (and millions of additional site visitors when extrapolating across the entire Styling keyword landscape) is a lost opportunity that these companies otherwise have the resources to achieve.




Product vs. Informational Keywords

Of the 271 keywords examined for the Styling sector, 224 keywords (82.66%) were identified as informational and 47 were product-related (17.34%). The informational keywords similarly represent 534,490 (76.94%) of the 694,700 monthly Google searches.

The top 10 keywords with the highest Google search volumes in the Styling sector break down as follows:

KEYWORDS: PRODUCT VS INFO	
KEYWORD	MONTHLY SEARCH VOL
dry shampoo	60,500
leave in conditioner	49,500
best shampoo and conditioner	49,500
hair oil	33,100
hair mousse	33,100
best dry shampoo	27,100
deep conditioner	27,100
hair gel	22,200
best leave in conditioner	18,100
best hair oil	14,800



KEY: SEARCH INTENT

Informational

Product

ONLY
2 OUT OF **10**

of the top 10 keywords are **product-related.**

Given that informational search intent is responsible for the majority of the top ranking Styling keywords, it would make sense for beauty brands to target informational keywords in their marketing efforts.





Informational Search

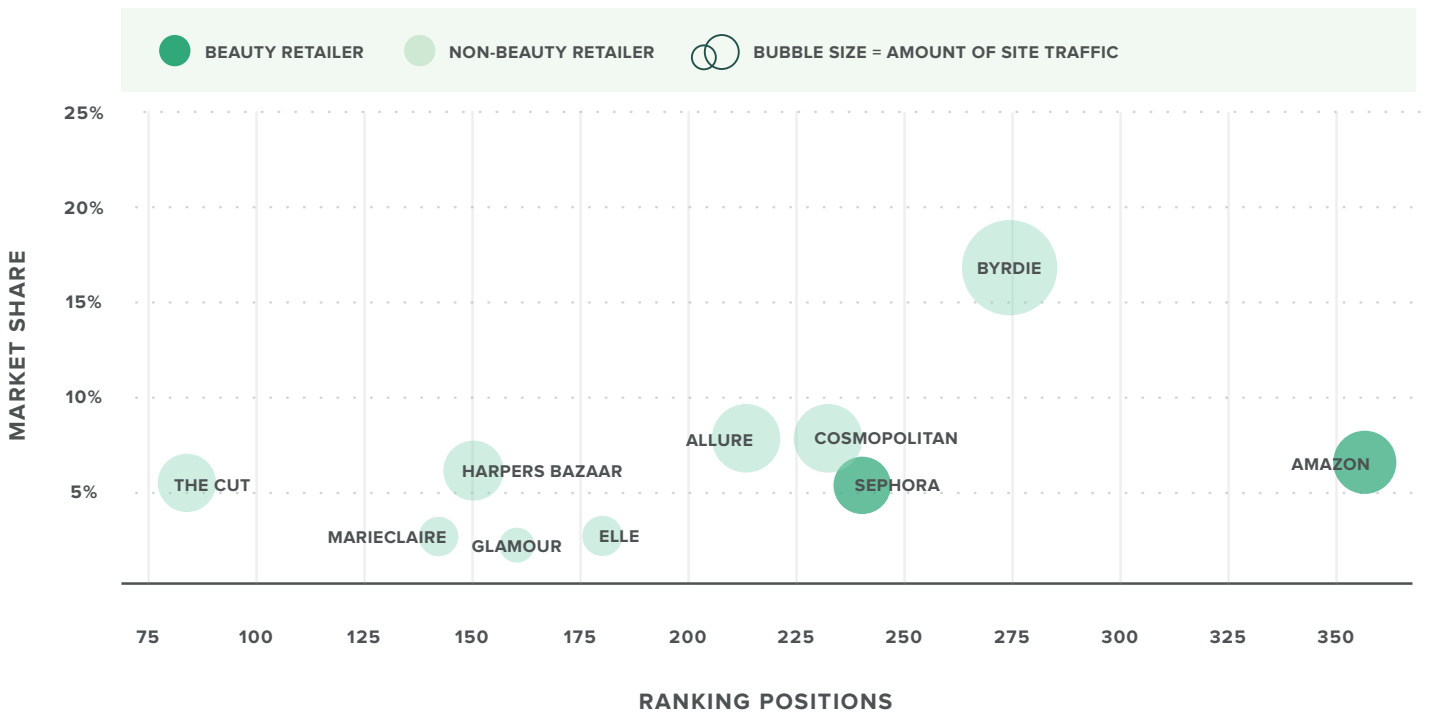
Which brands are capturing the largest share of searches with informational search intent? It's not that different from who is winning overall in the Styling sector.

Byrdie.com leads the way with 16.67% market share followed by Allure.com (7.79%), Cosmopolitan.com (7.78%), Amazon.com (6.52%), and Harpersbazaar.com (6.13%). Out of the top 20 market share holders, non-retailers have 61.90% of the organic market share for informational keywords.

See the data below for additional details:

HAIR CARE: STYLING / INFO

FIGURE 13



HAIRCARE: STYLING / INFO	
COMPANY	MARKET SHARE
byrdie.com	16.67
allure.com	7.79
cosmopolitan.com	7.78
amazon.com	6.52
harpersbazaar.com	6.13
thecut.com	5.46
sephora.com	5.33
elle.com	2.65
glamour.com	2.11
marieclaire.com	2.60
goodhousekeeping.com	2.20
naturallycurly.com	2.00
ulta.com	1.57
wikipedia.com	1.57
self.com	1.23
ipsy.com	1.09
vogue.com	0.97
healthline.com	0.94
nymag.com	0.91
thetrendspotter.net	0.89



KEY:

Non-Beauty Retailer

Beauty Retailer

ROUGHLY
80%

of the top ranking
Hair Care Styling
results are going to
non-beauty retailers



Product Search

In comparison, the Google organic market share for product-related keywords, again representing 160,210 monthly searches, includes more beauty brands and retailers than the informational keywords. This makes sense, given the product-focused nature of their businesses.

However, it may be surprising for those in the industry to see so many publishers, non-beauty brands, and non-beauty retailers as well capturing a sizable percentage of market share for these types of searches. In fact, the top three market share holders, and eight of the top 11, are non-beauty brands and non-beauty retailers. And overall, the publishers, non-beauty brands, and non-beauty retailers are capturing 54.28% of the available searches for these product keywords.

The top 3 Google market share holders for product-related queries, and 8 of the top 11, are surprisingly non-beauty brands and retailers.

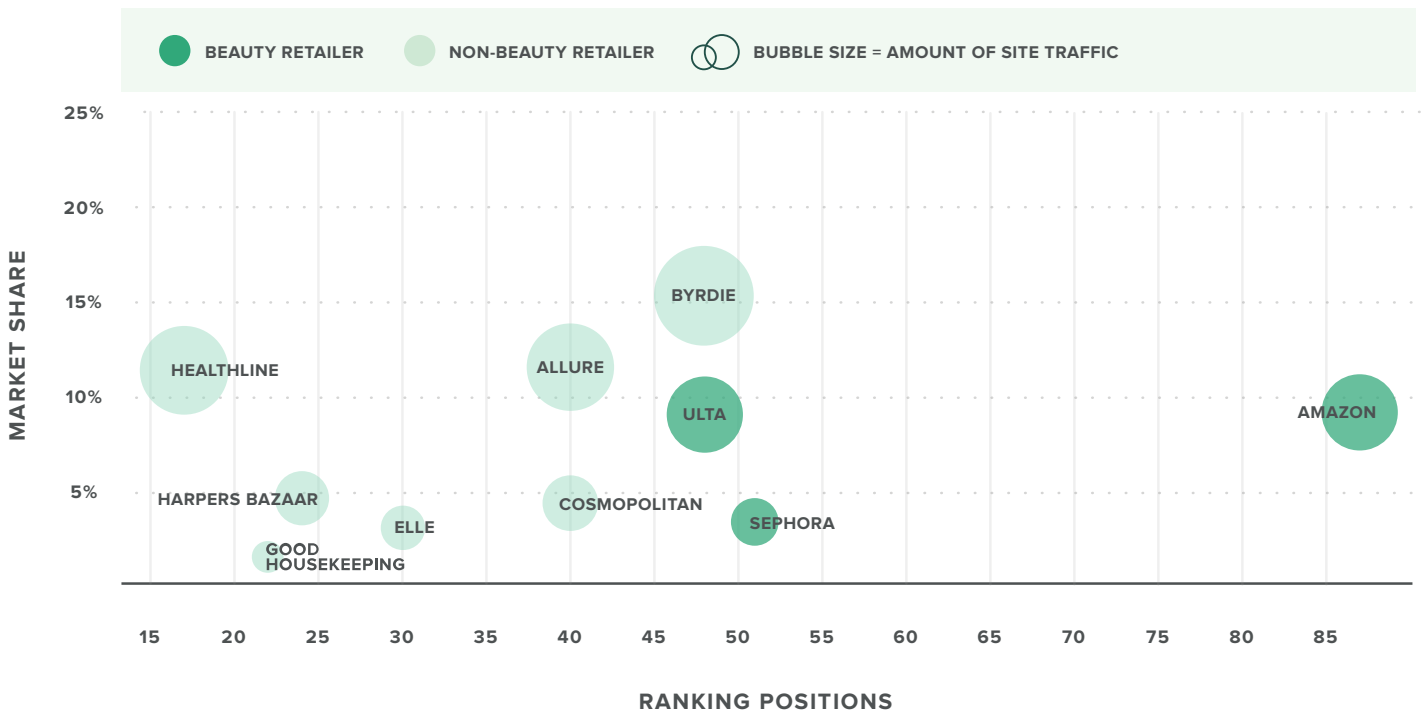
That's more than half of all the Styling product-focused searches going to non-beauty brands and non-beauty retailers.

For every search that these websites capture, there's a greater volume of lost revenue among the beauty brands and retailers. As noted earlier, it's surprising that companies with such vast resources are **allowing so much organic market share to go to those who are not even selling beauty products.**

So, which beauty brands and retailers are capturing the most Google market share for product-related keywords? See the data as follows:

HAIR CARE: STYLING / PRODUCT

FIGURE 14



SKINCARE: STYLING / PRODUCT	
COMPANY	MARKET SHARE
byrdie.com	15.09
allure.com	11.52
healthline.com	11.31
amazon.com	9.07
ulta.com	8.99
harparsbazaar.com	4.54
cosmopolitan.com	4.30
sephora.com	3.31
elle.com	2.95
goodhousekeeping.com	1.48
glamour.com	1.33
walmart.com	1.02
target.com	1.01
businessinsider.com.com	0.95
waterlesshaircare.com	0.88
brit.co	0.81
sallybeauty.com	0.78
cvs.com	0.80

↑

KEY:

- Non-Beauty Retailer
- Beauty Retailer

Compare to Paid Search Costs

Understanding that many beauty brands turn to paid search to compete in the search engines, let's examine what it would cost to try to compete for those 3,264,000 lost site visitors mentioned previously in the Styling space.

Assuming an average cost-per-click of \$1.50 to \$3, capturing this traffic through paid search would cost \$4.8 to \$9.8 million annually.

And again, extrapolated across the larger keyword landscape, the cost would be higher. Clearly, it's beneficial to secure as many of these searches through organic search as possible. The cost-per-lead via organic search would be a fraction of that of paid search.

Market Share Trends

Terakeet examined pre-pandemic through post-pandemic (February 2019 - February 2021) market share trends. During that period, Ulta.com went from having the second largest market share (behind publisher Allure.com) to the sixth, losing 5.79 percentage points in share in the process.

Conversely, publishers and blogs have snatched up an eye-popping amount of market share through the pandemic. Byrdie increased its share more than 18X—from 0.88% to 16.31%. Harporsbazaar.com increased its share from 2.11% to 5.76%, while Healthline.com grew from 0.01% to 3.33%.

Amazon was the strongest retailer in the Styling sector, increasing its market share by 23.87% (1.37 percentage points), from 5.74% to 7.11%. This is consistent with Amazon's strength in Hair Care overall.

The common thread here is that beauty publishers and blogs are winning a larger share of organic search over time and outranking the established beauty retailers in Google. Search terms which were previously transactional have taken on a more informational intent, and Google is rewarding websites that publish informational content accordingly.



Conclusion

In the Styling sector of the Hair Care market, many beauty publications and other non-beauty brands and non-beauty retailers are capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 18 positions in market share for the 271 high-value keywords analyzed, 14 are non-beauty brands / non-retailers. Together, they hold a 58.71% market share, representing 272,000+ in monthly website traffic.

As mentioned earlier, that's approximately 3,264,000 website visits that established beauty brands and retailers offering Styling products are not seeing every year. When factoring in hundreds of additional, relevant Hair Care and Styling keywords, the organic traffic being lost annually by established beauty brands and retailers is much higher.

Even when looking exclusively at product-focused keywords for which one would expect beauty brands and retailers to dominate in Google, publishers and other websites that do not even sell beauty products are capturing 54.28% of the Google organic market share — more than half of all the corresponding search traffic.

Amazon is the lone retailer that has been capturing significant market share increases in the Styling sector. They are an outlier compared to the other retailers in the space.



There's a market opportunity to attract millions of site visitors actively seeking Styling products and related information via Google. Beauty brands offering products within the Styling sector need to consider the entire competitive landscape, and not only traditional offline competitors, when approaching organic search. By better understanding the competitive landscape, established beauty brands can compete against beauty publishers and informational websites more effectively and secure more site traffic, orders, and customers.

Get a Custom Analysis

Interested in understanding your organic search market share and seeing how you compare to your competitors?

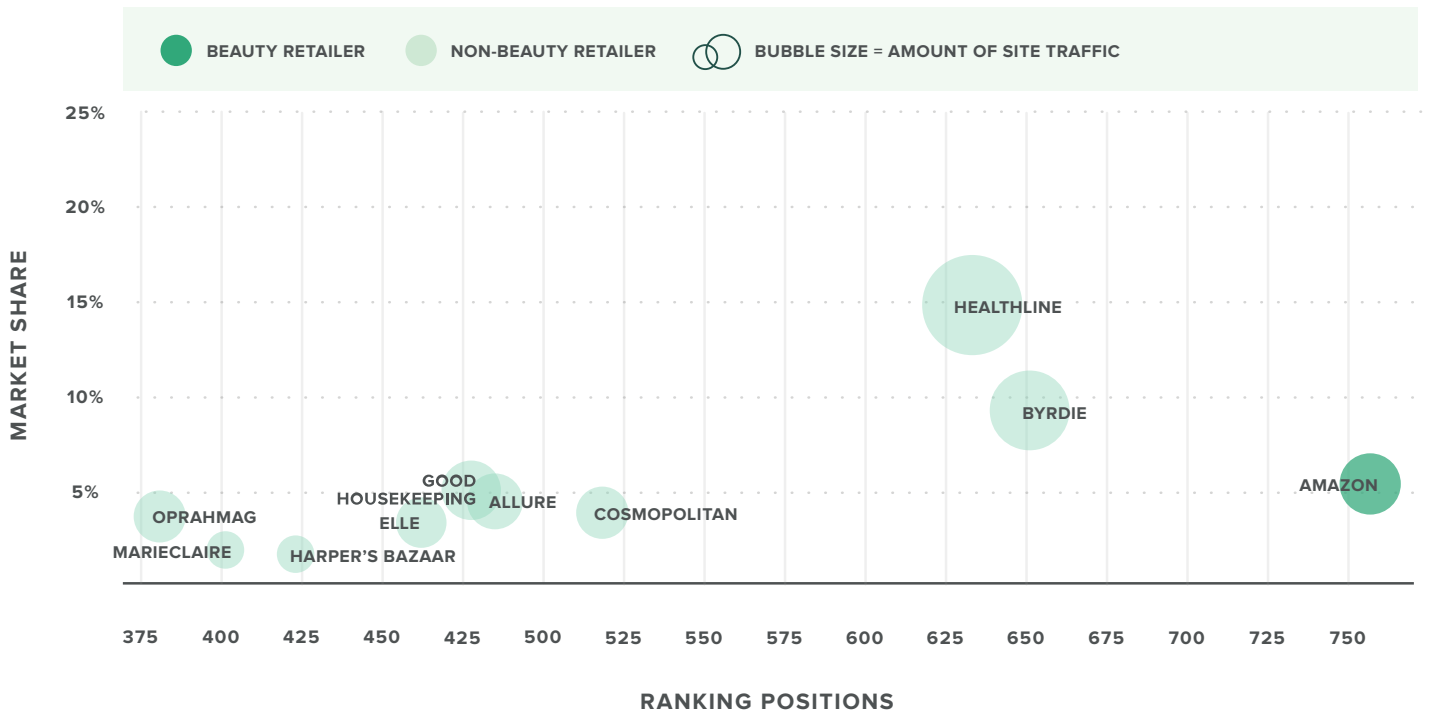
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Hair Care

Treatments

HAIR CARE: TREATMENTS

FIGURE 15



Terakeet's analysis of the Treatments sector of the Hair Care market involved 589 high-value keywords with a total monthly Google organic search volume of 1,766,590.

When looking at the Treatments sector, once again, we see many publishers and informational websites capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 19 positions in market share, 15 (78.95%) are non-beauty brands / non-beauty retailers. Together, they hold a 57.16% Google organic search market share, representing more than 674,017 in monthly website traffic from 6,335 keyword rankings.

That's approximately 8.09 million website visits that established beauty brands offering products in the Treatments market sector are not seeing every year.

Keep in mind that this is a fraction of the entire market of terms being searched related to Hair Care and Treatments. **When factoring in hundreds of additional, relevant Hair Care and Treatment keywords instead, the organic traffic being lost annually by established beauty brands and retailers is much higher.**



Organic Search Market Share

The Google organic market share for the 589 keywords examined in the Treatments sector of the Hair Care market breaks down as follows:

MARKET SHARE: HAIR TREATMENTS	
COMPANY	MARKET SHARE
healthline.com	15.00
byrdie.com	9.36
amazon.com	5.42
goodhousekeeping.com	5.30
allure.com	4.58
cosmopolitan.com	3.97
oprahmag.com	3.74
elle.com	3.40
marieclaire.com	2.00
harparsbazaar.com	1.88
sephora.com	1.72
webmd.com	1.72
medicalnewstoday.com	1.71
womenshealthmag.com	1.50
luxyhair.com	1.27
whowhatwear.com	1.12
ulta.com	1.10
prevention.com	0.96
exporthometips.com	0.92

↑
KEY:
 Non-Beauty Retailer
 Beauty Retailer

NEARLY
80%

of the organic market share for **Hair Care Treatments** is going to **non-beauty retailers**

Given that the top 10 beauty brands in the world are worth more than \$65 billion combined, it's surprising that these established brands are not able to compete more effectively for these highly valuable keywords. To lose out on approximately 8.09 million site visitors annually for merely a subsection of keywords (and millions of additional site visitors when extrapolating across the entire Treatments keyword landscape) is a lost opportunity that these companies otherwise have the resources to achieve.



Product vs. Informational Keywords

Of the 589 keywords examined for the Treatments sector, 542 keywords (92.02%) were identified as informational and 47 were product-related (7.98%). The informational keywords similarly represent 1,567,470 (88.72%) of the 1,766,590 monthly Google searches.

The top 10 keywords examined with the highest Google search volumes in the Treatments sector break down as follows:

KEYWORDS: PRODUCT VS INFO

KEYWORD	MONTHLY SEARCH VOL
hair growth oil	60,500
hair growth	49,500
how fast does hair grow	40,500
how to make your hair grow faster	40,500
dry scalp	40,500
frizzy hair	33,100
how to grow hair faster	33,100
biotin shampoo	33,100
hair care	27,100
hair growth products	27,100



KEY: SEARCH INTENT

Informational

Product

ONLY

1 OUT OF 10

1 of the top 10 keywords are product-related.

Given that informational search intent is responsible for the majority of the top ranking keywords, it would make sense for beauty brands to target informational keywords in their marketing efforts beyond product keywords.



Informational Search

Which brands are capturing the largest share of searches with informational search intent? It's not that different from who is winning overall in the Treatments sector.

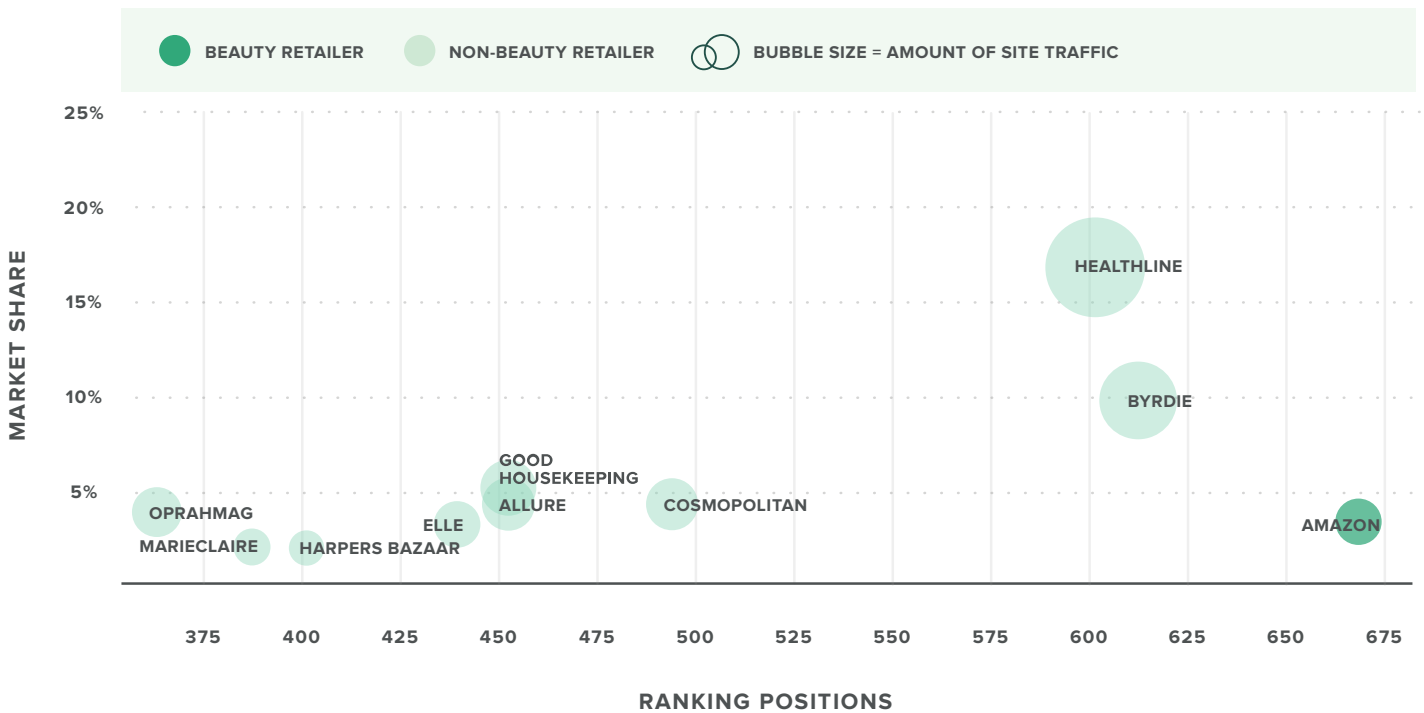
Healthline leads the way with 16.78% market share followed by Byrdie.com (9.86%), Goodhousekeeping.com (5.13%), Allure.com (4.38%), and Cosmopolitan.com (4.34%). Out of the top 19 market share holders, non-retailers have 61.73% of the organic market share for informational keywords.

See the data below for additional details:



HAIR CARE: TREATMENTS / INFO

FIGURE 16



HAIR CARE: TREATMENTS / INFO	
COMPANY	MARKET SHARE
healthline.com	16.78
byrdie.com	9.86
goodhousekeeping.com	5.13
allure.com	4.38
cosmopolitan.com	4.34
oprahmag.com	3.88
amazon.com	3.46
elle.com	3.44
marieclaire.com	2.13
harparsbazaar.com	2.04
webmd.com	1.93
medicalnewstoday.com	1.92
womenshealthmag.com	1.67
luxyhair.com	1.43
sephora.com	1.27
whowhatwear.com	1.18
exporthometips.com	1.04
prevention.com	1.04
thecut.com	0.97



KEY:

Non-Beauty Retailer

Beauty Retailer

NEARLY
85%

of the top ranking
Hair Care Treatment
results are going to
non-beauty retailers



Product Search

In comparison, the Google organic market share for product-related keywords, again representing 199,120 monthly searches, includes more beauty brands and retailers than the informational keywords. This makes sense, given the product-focused nature of their businesses.

However, it may be surprising for those in the industry to see so many publishers, non-beauty brands, and non-beauty retailers as well capturing a sizable percentage of market share for these types of searches. In fact, three of the top five market share holders are non-beauty brands and non-beauty retailers. And overall, the publishers, non-beauty brands, and non-beauty retailers are capturing 29.82% of the available searches for these product keywords.

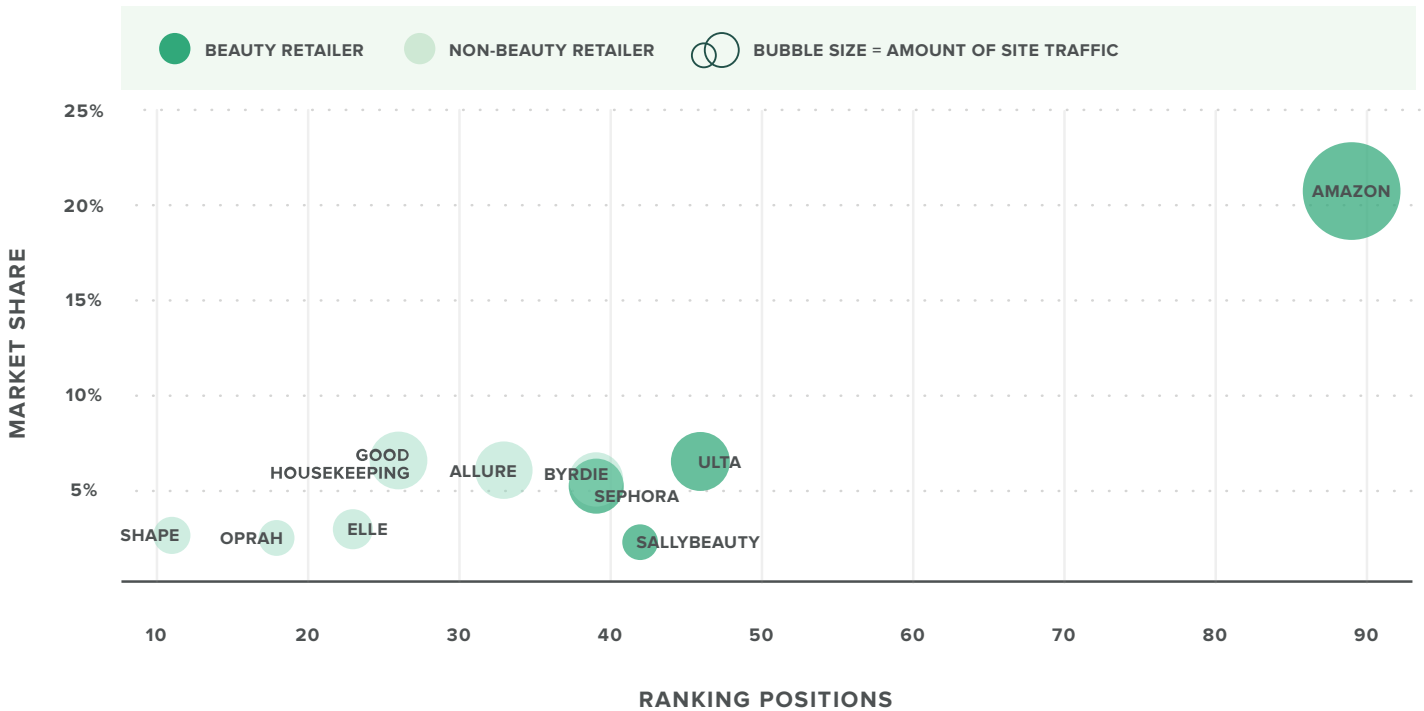
That’s nearly one-third of all the Treatments product-focused searches going to non-beauty brands and non-beauty retailers.

For every search that these websites capture, there’s a greater volume of lost revenue among the beauty brands and retailers. As noted earlier, it’s surprising that companies with such vast resources are **allowing so much organic market share to go to those who are not even selling beauty products.**

So, which beauty brands and retailers are capturing the most Google market share for product-related keywords? See the data as follows:

HAIR CARE: TREATMENTS / PRODUCT

FIGURE 17



HAIR CARE: TREATMENTS / PRODUCT	
COMPANY	MARKET SHARE
amazon.com	20.79
goodhousekeeping.com	6.65
ulta.com	6.57
allure.com	6.14
byrdie.com	5.47
sephora.com	5.26
elle.com	3.09
shape.com	2.73
oprahmag.com	2.61
sallybeauty.com	2.4
walmart.com	2.12
saloncentric.com	1.64
dermstore.com	1.49
beautybrands.com	1.17
target.com	1.16
cosmopolitan.com	1.07
health.com	1.03
healthline.com	1.03



KEY:
■ Non-Beauty Retailer
■ Beauty Retailer

Compare to Paid Search Costs

Understanding that many beauty brands turn to paid search to compete in the search engines, let's examine what it would cost to try to compete for those 8.09 million lost site visitors mentioned previously in the Treatments space. Assuming an average cost-per-click of \$1.00 to \$2.50, capturing this traffic through paid search would cost \$8 million to \$20.2 million annually.

And again, extrapolated across the larger keyword landscape, the cost would be higher. Clearly, it's beneficial to secure as many of these searches through organic search as possible. The cost-per-lead via organic search would be a fraction of that of paid search.

Market Share Trends

When looking at the product and informational keywords within the Treatments sector, outside of Amazon, beauty brands and retailers have been weak throughout the two-year period of February 2019 through February 2021.

Amazon held steady, slightly increasing its market share from 5.34% to 5.42% during that time. With far lower market share, Ulta and Sephora both lost ground, with each holding less than a 2% share of the market in February 2021.

Conversely, Healthline.com skyrocketed from 6.31% all the way to 15.00% market share, capturing the top spot overall in the Treatments sector in the process. Similarly, Byrdie went from 4.19% to 9.36%, seizing the second highest market share. Goodhousekeeping.com began 2019 with 1.23% market share, and ended up with 5.30% in February 2021.

The common thread here is that beauty publishers and blogs are winning a larger share of organic search over time and outranking the established beauty brands and retailers in Google. Similarly to the Styling sector, the Treatments sector is experiencing a shift in search intent as Google is favoring informational content in the SERPs over product-related, transactional web pages.

BYRDLE CASE STUDY:

How the Beauty Blog Increased Google Organic Market Share by 12X to Outrank Competitors.

[VIEW CASE STUDY](#)

Conclusion

In the Treatments sector of the Hair Care market, many beauty publications and other non-beauty brands and non-beauty retailers are capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 19 positions in market share for the 589 high-value keywords analyzed, 15 are non-beauty brands / non-beauty retailers. Together, they hold a 57.16% Google organic search market share, representing more than 674,017 in monthly website traffic from 6,335 keyword rankings.

As mentioned earlier, that's approximately 8.09 million website visits that established beauty brands and retailers offering Treatment products are not seeing every year. When factoring in hundreds of additional, relevant Hair Care and Treatment keywords, the organic traffic being lost annually by established beauty brands and retailers is much higher.

Even when looking exclusively at product-focused keywords for which one would expect beauty brands and retailers to dominate in Google, publishers and other websites that do not even sell beauty products are capturing 29.82% of the Google organic market share — nearly one-third of all the corresponding search traffic.



There's a market opportunity to attract millions of site visitors actively seeking Treatment products and related information via Google. Beauty brands offering products within the Treatment sector need to consider the entire competitive landscape, and not only traditional offline competitors, when approaching organic search. By better understanding the competitive landscape, established beauty brands can compete against beauty publishers and informational websites more effectively and secure more site traffic, orders, and customers.

Get a Custom Analysis

Interested in understanding your organic search market share and seeing how you compare to your competitors?

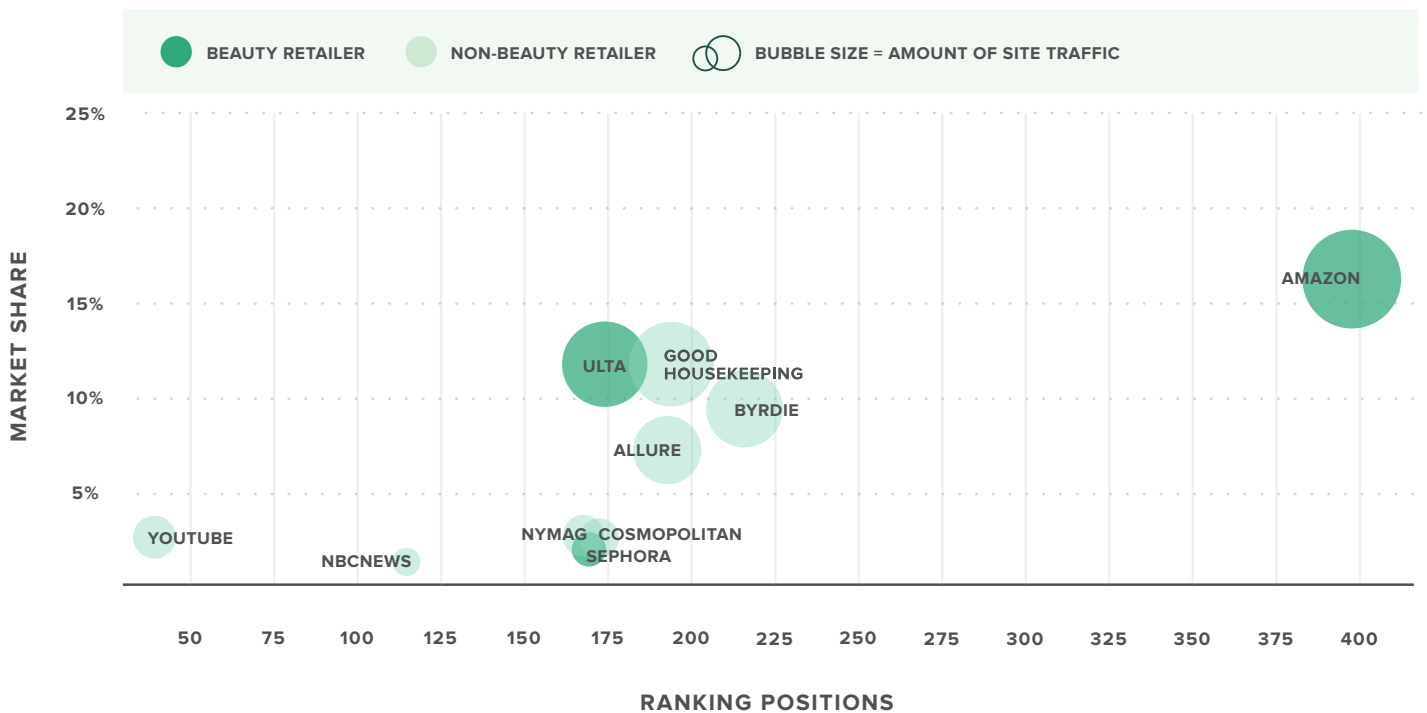
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Hair Care

Tools

HAIR CARE: TOOLS

FIGURE 18



Terakeet’s analysis of the Tools sector of the Hair Care market involved 343 high-value keywords with a total monthly Google organic search volume of 1,107,420.

When looking at the Tools sector, once again, we see many publishers and informational websites capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 17 positions in market share, 10 (58.82%) are non-beauty brands / non-beauty retailers. Together, they hold a 41.48% market share, representing 306,561 in monthly website traffic from 2,623 rankings.

That’s approximately 3.7 million website visits that established beauty brands offering products in the Tools market sector are not seeing every year.

Keep in mind that this is a fraction of the entire market of terms being searched related to Hair Care and Tools. **When factoring in hundreds of additional, relevant Hair Care and Tools keywords instead, the organic traffic being lost annually by established beauty brands and retailers is much higher.**



Organic Search Market Share

The Google organic market share for the 343 keywords examined in the Tools sector of the Hair Care market breaks down as follows:

MARKET SHARE: HAIR CARE TOOLS	
COMPANY	MARKET SHARE
amazon.com	16.41
ulta.com	11.87
goodhousekeeping.com	11.76
byrdie.com	9.45
allure.com	7.28
nymag.com	2.76
youtube.com	2.72
cosmopolitan.com	2.56
sephora.com	2.00
nbcnews.com	1.41
glamour.com	1.33
walmart.com	1.21
target.com	1.17
vogue.com	1.11
self.com	1.10
sallybeauty.com	1.04
samvilla.com	0.82

KEY:

- Non-Beauty Retailer
- Beauty Retailer

NEARLY
60%
of the organic market share for **Hair Care Tools** is going to non-beauty retailers

Given that the top 10 beauty brands in the world are worth more than \$65 billion combined, it's surprising that these established brands are not able to compete more effectively for these highly valuable keywords. To lose out on approximately 3,700,000 site visitors annually for merely a subsection of keywords (and millions of additional site visitors when extrapolating across the entire Tools keyword landscape) is a lost opportunity that these companies otherwise have the resources to achieve.



Product vs. Informational Keywords

Searches for informational keywords primarily lead to Google results featuring content such as listicles and other blog posts, guides and how-to videos. The search intent is to find or discover content, information, or answers. Non-branded product keywords drive product-specific Google results and point-of-purchase marketing. The search intent is to find a certain type of product (and in many cases to purchase that product), although the searcher has not indicated a brand preference.

Of the 343 keywords examined for the Tools sector, 225 keywords (65.60%) were identified as informational and 118 were product-related (34.40%). The informational keywords similarly represent 527,760 (47.66%) of the 1,107,420 monthly Google searches.

The top 10 keywords with the highest Google search volumes in the Tools sector break down as follows:

KEYWORDS: PRODUCT VS INFO

KEYWORD	MONTHLY SEARCH VOL
curling iron	74,000
hair straightener	74,000
flat iron	74,000
hair dryer	74,000
curling wand	60,500
blow dryer	49,500
best hair straightener	27,100
best hair dryer	27,100
straightener	27,100
best curling iron	22,200



KEY: SEARCH INTENT

Informational
Product

60%

18 of the top 30 keywords with the highest search volume in the Tools sector are information-related.

Given that there is a consistent mix of informational and product-related keywords, it would make sense for beauty brands to target both types of keywords in their marketing efforts.



Informational Search

Which brands are capturing the largest share of searches with informational search intent? Beauty publishers and bloggers are winning a larger percentage of market share in this category.

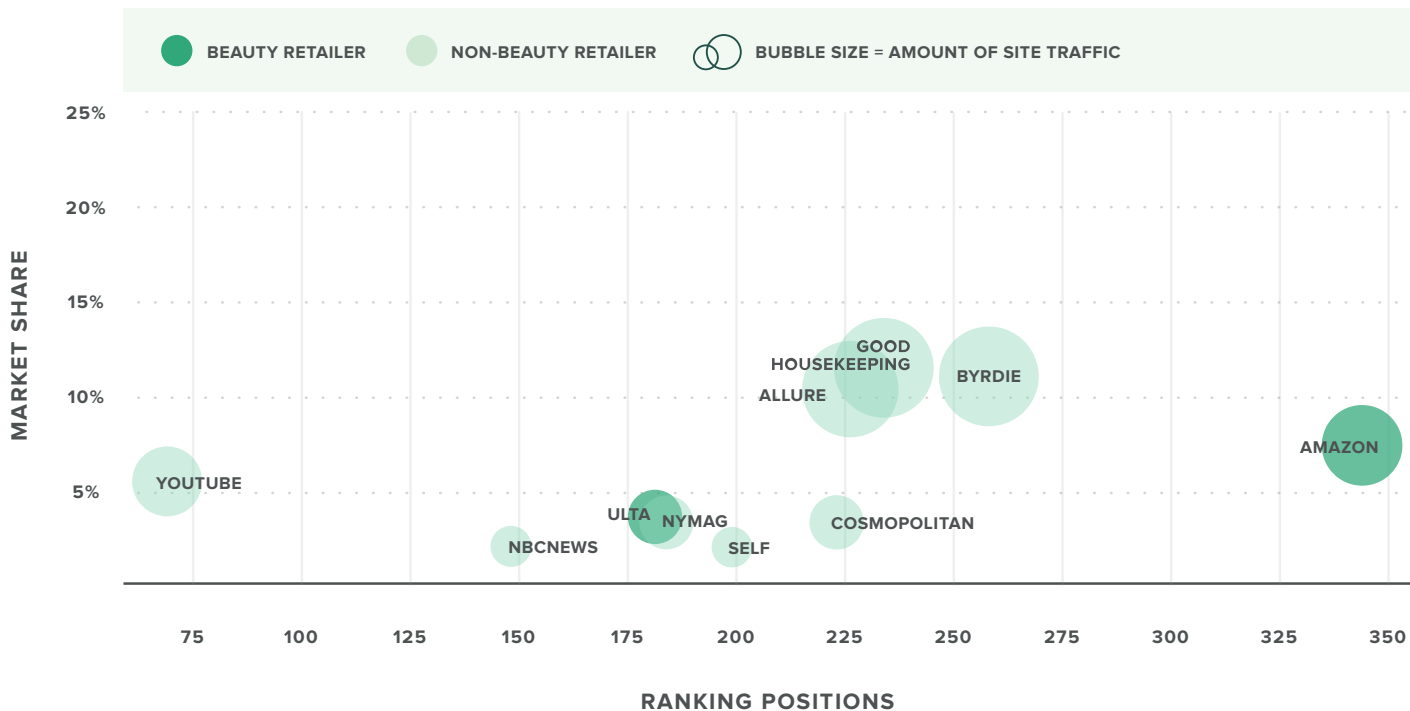
Goodhousekeeping.com leads the way with 11.55% market share followed by Byrdie.com (11.08%), Allure.com (10.37%), Amazon (7.50%), and YouTube (5.62%). Out of the top 20 market share holders, non-beauty brands and non-beauty retailers have 58.19% of the organic market share for informational keywords.

See the data below for additional details:



HAIR CARE: TOOLS / INFO

FIGURE 19



HAIR CARE: TOOLS / INFO

COMPANY	MARKET SHARE
goodhousekeeping.com	11.55
byrdie.com	11.08
allure.com	10.37
amazon.com	7.50
youtube.com	5.62
ulta.com	3.66
cosmopolitan.com	3.42
nymag.com	3.35
nbcnews.com	2.11
self.com	2.04
samvilla.com	1.72
glamour.com	1.60
vogue.com	1.53
ipsy.com	1.44
instyle.com	1.22
sephora.com	1.11
wikihow.com	1.09
elle.com	1.09
harparsbazaar.com	1.07
thecut.com	1.05



KEY:

- Non-Beauty Retailer
- Beauty Retailer

ROUGHLY
80%

of the top ranking
Hair Care Tools
results are going to
non-beauty retailers



Product Search

3 of the top 5 market share holders for product-related queries are non-beauty retailers.

In comparison, the Google organic market share for product-related keywords, again representing 579,660 monthly searches, includes more beauty brands and retailers than the informational keywords. This makes sense, given the product-focused nature of their businesses.

However, it may be surprising for those in the industry to see so many publishers, non-beauty brands, and non-beauty retailers as well capturing a sizable percentage of market share for these types of searches. In fact, three of the top five are non-beauty brands and non-beauty retailers. And

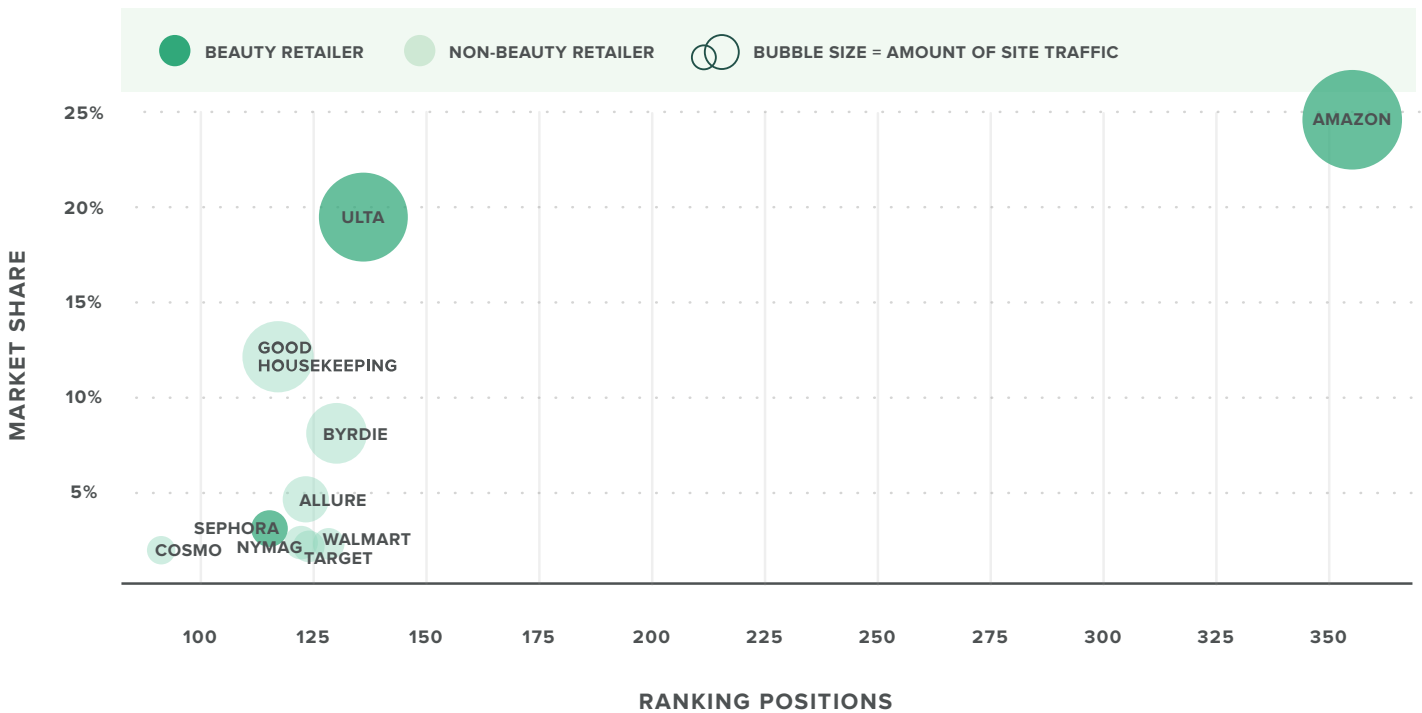
overall, the publishers, non-beauty brands, and non-beauty retailers are capturing 30.22% of the available searches for these product keywords.

For every search that these websites capture, there's a greater volume of lost revenue among the beauty brands and retailers. As noted earlier, it's surprising that companies with such vast resources are **allowing so much organic market share to go to those who are not even selling beauty products.**

So, which beauty brands and retailers are capturing the most Google market share for product-related keywords? See the data as follows:

HAIR CARE: TOOLS / PRODUCT

FIGURE 20



SKIN CARE: TOOLS / PRODUCT	
COMPANY	MARKET SHARE
amazon.com	24.53
ulta.com	19.34
goodhousekeeping.com	11.94
byrdie.com	7.97
allure.com	4.46
sephora.com	2.81
nymag.com	2.23
walmart.com	2.09
target.com	1.87
cosmopolitan.com	1.77
sallybeauty.com	1.71
glamour.com	1.09
bedbathandbeyond.com	0.89
nbcnews.com	0.76



KEY:

Non-Beauty Retailer

Beauty Retailer

Compare to Paid Search Costs

Understanding that many beauty brands turn to paid search to compete in the search engines, let's examine what it would cost to try to compete for those 3.7 million lost site visitors mentioned previously in the Tools space. Assuming an average cost-per-click of \$0.50 to \$1.50, capturing this traffic through paid search would cost \$1.85 to \$5.6 million annually.

And again, extrapolated across the larger keyword landscape, the cost would be higher. Clearly, it's beneficial to secure as many of these searches through organic search as possible. The cost-per-lead via organic search would be a fraction of that of paid search.

Market Share Trends

Terakeet examined pre-pandemic through post-pandemic (February 2019 - February 2021) market share trends in the Tools space. During that period, Ulta went from having the largest market share to the second largest, behind Amazon, falling from 14.34% to 11.87% in share in the process.

Amazon was an outlier among retailers during this two-year period, increasing market share from 10.14% to 16.41%, and capturing the top spot in the process.

Publishers and blogs have snatched up an eye-popping amount of market share through the pandemic. Byrdie increased its market share 21X, from 0.45% to 9.45%. Goodhousekeeping.com went from 1.9% to 11.76%, going from eighth in market share to third.

The common thread here is that beauty publishers and blogs are increasingly seizing a larger share of organic search over time from established beauty brands and retailers (outside of Amazon) in Google. Amazon is still a force to be reckoned with, yet is an outlier among retailers.

Even considering Amazon's performance, many search terms which were previously transactional have taken on a more informational intent, and Google is rewarding websites that publish informational content accordingly.



Conclusion

In the Tools sector of the Hair Care market, many beauty publications and other non-beauty brands and non-beauty retailers are capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 17 positions in market share for the 343 high-value keywords analyzed, 10 are non-beauty brands / non-retailers. Together, they hold a 41.48% market share, representing 306,561 in monthly website traffic from 2,623 rankings.

As mentioned earlier, that's approximately 3.7 million website visits that established beauty brands and retailers offering Tools products are not seeing every year. When factoring in hundreds of additional, relevant Hair Care and Tools keywords, the organic traffic being lost annually by established beauty brands and retailers is much higher.

Even when looking exclusively at product-focused keywords for which one would expect beauty brands and retailers to dominate in Google, publishers and other websites that do not even sell beauty products are capturing 38.34% of the Google organic market share.



There's a market opportunity to attract millions of site visitors actively seeking Hair Care tools and related information via Google. Beauty brands offering products within the Tools sector need to consider the entire competitive landscape, and not only traditional offline competitors, when approaching organic search. By better understanding the competitive landscape, established beauty brands can compete against publishers, medical sites, and informational websites more effectively and secure more site traffic, orders, and customers.

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**Google Market
Share Report for
The Beauty Industry**

SECTOR 3:

Makeup

KEY POINTS:

Compared to the Google organic market share results for Skincare and Hair Care, established beauty brands are performing better in the Makeup search landscape. Sephora, Amazon, and Ulta are capturing significant market share across the different market sectors examined for both informational and product-related searches.

With a weak content portfolio, though, many other traditional beauty brands and retailers have been losing a certain degree of Google market share through the pandemic. The main outlier is Amazon, which has performed well and increased market share in the Makeup space through the pandemic.

Even so, informational websites and blogs, largely through the publication of long-form content, are achieving a surprising level of success in the Google SERPs for beauty-related queries.

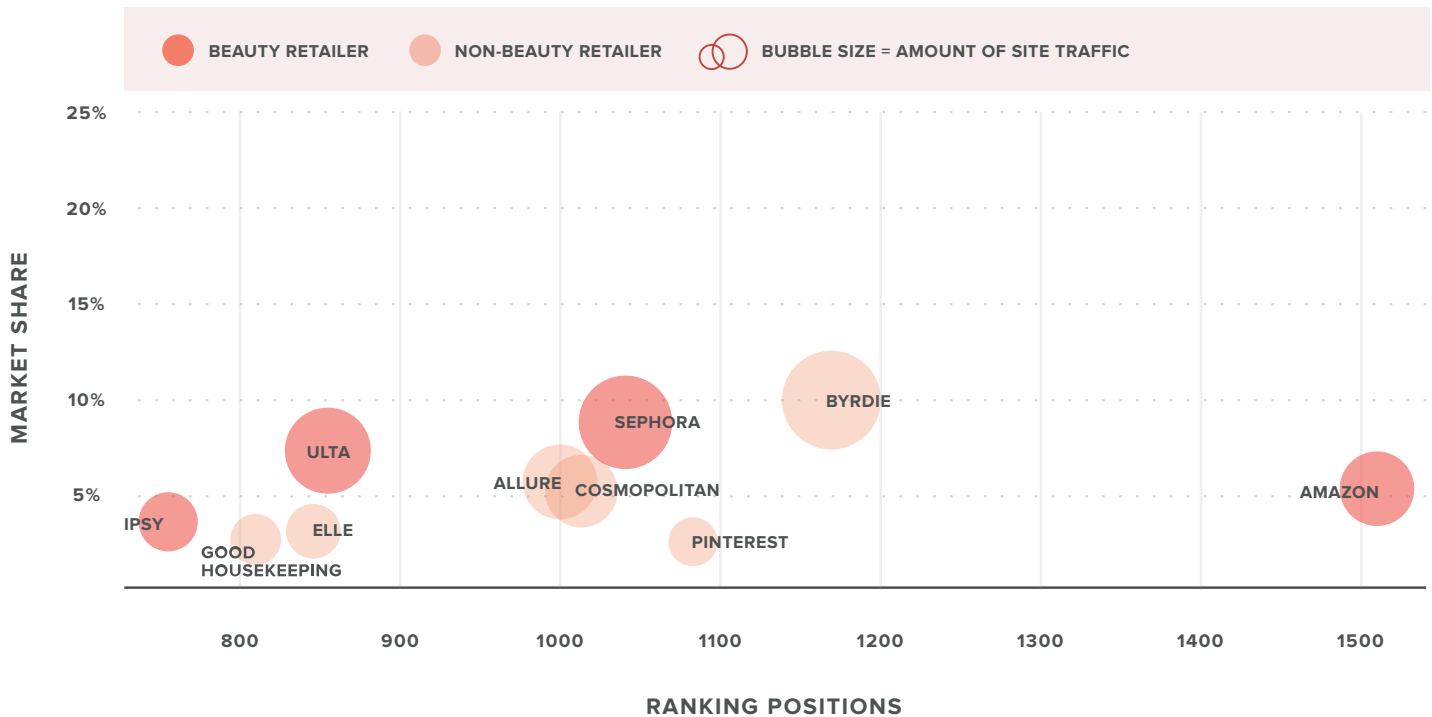
For example, Byrdie has performed exceptionally well in the Makeup market, significantly increasing market share and taking the number one spot for greatest market share overall.

Makeup

Google Organic Market Share Analysis

MARKET: MAKEUP

FIGURE 21



EXECUTIVE SUMMARY

Terakeet analyzed the Google organic search landscape for the Makeup market, including the following market sectors:

- > Face
- > Eye
- > Lip

As you can see in the chart above, there are more publishers and bloggers than established brands ranking among the top 23 market share holders (15 out of the top 23). Beauty brands and retailers in the Makeup market are being outperformed by publishers and informational

websites when looking at the search market landscape at a 10,000 foot view.

However, unlike the Skincare and Hair Care markets, established beauty brands and retailers are holding their own much more so in the Makeup market. For example, a greater number of brands and retailers are ranking within the top 10 of market share leaders overall. Three out of the top five market share holders are established brands (Sephora, Ulta and Amazon). And in the Lip sector of the market, beauty brands and retailers boast a strong market share of 66.46% overall and 91.59% for product-related queries specifically.



Top 10 Brands

It's one thing to understand market share. It's quite another to understand the underlying reasons why certain websites are crushing it in organic search and others are underperforming given their offline size and market presence.

To that end, we analyzed the 10 brands with the highest market share in Makeup (representing more than 1,249,500 in monthly organic search traffic):



1 Byrdie

9.98% MARKET SHARE

- Byrdie has a wealth of long-form content
- Product review pages, gift guides, and a news section
- Over 87,700 websites pointing links at Byrdie

2 Sephora

8.86% MARKET SHARE

- Sephora has a wealth of beauty guides and “best of” product sections
- Beauty Insider Community forum and Q&A
- Over 89,000 websites pointing links at Sephora

3 Ulta

7.35% MARKET SHARE

- Ulta has a wealth of beauty tips and “best of” product sections
- Interactive beauty quizzes and tools
- Over 48,300 websites pointing links at Ulta

4 Allure

5.64% MARKET SHARE

- Allure has a wealth of long-form content
- Beauty trends, product reviews, gift guides, videos, and more
- Over 43,800 websites pointing links at Allure

5 Amazon

5.43% MARKET SHARE

- Amazon has a wealth of video content and live streamed product reviews
- Curated content, gift guides, blog, and best sellers section
- Over 3 million websites pointing links at Amazon

6 Cosmopolitan

5.32% MARKET SHARE

- Cosmopolitan has a wealth of long-form content and articles
- Segmented content of long reads, exclusive stories, and trending articles
- Over 99,600 websites pointing links at Cosmopolitan

7 Ipsy

3.58% MARKET SHARE

- Ipsy has a wealth of long-form content, IPSY 101, and beauty FAQ's
- Personalized glam bag and product suggestions
- Over 12,100 websites pointing links at Ipsy

8 Elle

3.12% MARKET SHARE

- Elle has a wealth of long-form content including a section of “Features and Long Reads”
- Segmented beauty content by “Makeup and Skincare”
- Over 118,000 websites pointing links at Elle

9 Good Housekeeping

2.64% MARKET SHARE

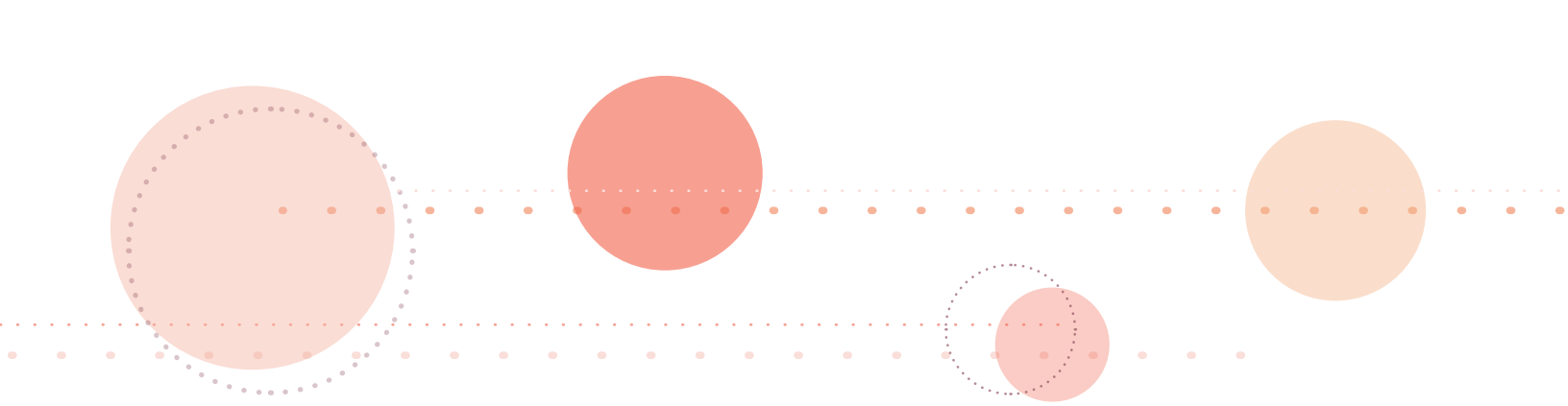
- Good Housekeeping has a wealth of long-form content
- Interactive quizzes, product reviews, recipes, and virtual summits
- Over 94,000 websites pointing links at Good Housekeeping

10 Pinterest

2.51% MARKET SHARE

- Pinterest has a range of different types of content
- “Daily Inspiration”, “Pinsights”, and content customized for developers, business, and the press
- Over 8.4 million websites pointing links at Pinterest





Takeaways

One common thread among the 10 top-performing websites (with Amazon and Pinterest being the outliers) is the abundance of well-organized long-form content.

Let's look at the "Makeup" section of Byrdie, for example. The average word count of its 10 most recent articles at the time of this writing is 1,486. Byrdie's topic area on "product reviews" boasts an average word count of 1,551. And it's not just these two sections. Byrdie's long-form content is pervasive throughout the site. It's this commitment to long-form content that has helped it to capture nearly 10% of the Google organic search market share of the Makeup keywords examined.

A second common thread among the top websites is that they diversify their content by offering site visitors comprehensive beauty guides, gift guides, product review pages, etc. These specialized content hubs are not only helpful to site visitors, but also act as backlink magnets.

For example, the beauty section of the Cosmopolitan website has attracted 245,000 backlinks from more than 12,800 websites. This has helped the beauty-related pages to rank on Google page one for more than 143,400 keywords in the U.S., and for more than 211,500 keywords overall.

Another example is the beauty section of the Good Housekeeping website, which has attracted more than 191,000 backlinks from more than 9,000 websites. The beauty product reviews area of the website ranks on Google page one for more than 126,000 keywords in the U.S., and has 190,000 ranking keywords overall. The area has attracted approximately 22,500 links from more than 2,100 websites. And the Makeup area of the site boasts an additional 104,000+ links from roughly 4,300 websites.

Beauty brands that are looking to win in organic search on non-branded terms need a solid content strategy that targets shoppers throughout the decision making process. As demonstrated by the organic search market share leaders, content volume matters, but so does depth and quality.

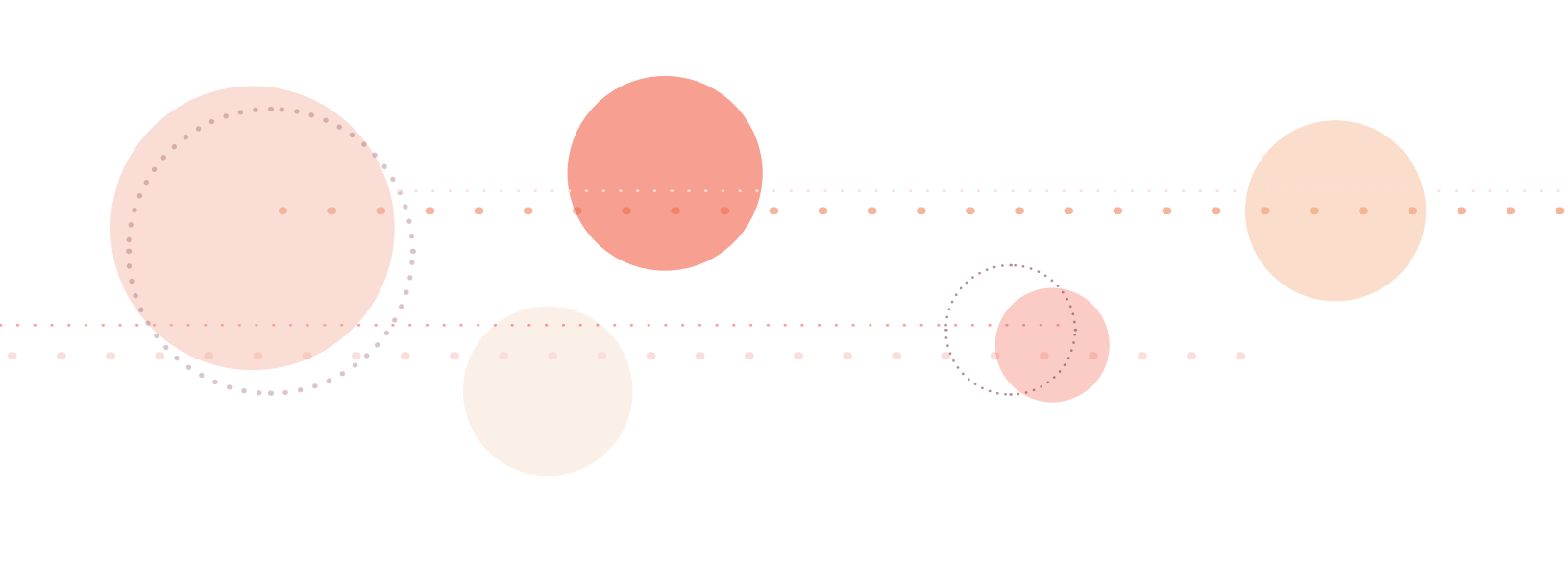
Product vs. Informational Search Queries

Beauty brands with a sliver of Google organic market share may believe that their poor performance applies only to informational keyword searches, where the searcher is more interested in learning something than buying something.

What Terakeet's analysis found, though, is that traditional beauty brands and retailers are losing a great deal of market share even on product-related searches, where the individual is actively seeking to purchase a certain type of product. Our analysis exclusively focused on non-branded searches, meaning that although these product-searchers had a purchase intent, they were open to finding or learning about new brands. In other words, there was no brand preference in their search.

When looking at 214 product-related keywords within the Makeup market (representing 1,070,320 monthly Google searches), 50% of the top six are publishers or blogs. Overall, though, publishers and blogs hold only 20.56% market share. It makes sense that beauty brands and retailers have such a stronghold on product-related queries. This is in contrast to the Skincare and Hair Care markets (the other markets examined in this report), where we found that publishers and informational websites held a high percentage of market share even on product-related searches.





Market Share Trends

Beauty brands and retailers that once held a higher Google organic market share are at risk of being outranked in a short period of time. In February 2019, Sephora had the highest market share for the Makeup terms examined at 11.88%. Two years later, in February 2021, Sephora's market share declined to 8.86% and the company dropped to 2nd overall behind publisher Byrdie.

Similarly, Ulta dropped from 9.23% market share to 7.35% during the same two-year period.

Conversely, various beauty publishers and informational websites have been gaining a larger percent of market share over time. In February 2019, Byrdie ranked 10th overall with only 1.72% market share. Within the two-year period, it jumped to 1st overall with 9.98% market share, a 5.7X increase. Goodhousekeeping.com jumped from 19th to 9th overall. Similarly, Pinterest went from less than 1 percent to 2.51% and moved up 16 ranking positions to land in the top 10 overall.

Despite the gaining momentum of beauty blogs and publishers, there are two retailers that managed to increase market share substantially from February 2019 to February 2021. Amazon (currently ranking 5th) increased its market share from 2.84% to 5.43% during the two-year period. In addition, Ipsy went from zero market share in the Makeup space to 3.58%, ranking 7th overall.

Why is it that so many established beauty brands and retailers with significant brick-and-mortar revenue are performing so poorly and yielding so much traffic and potential revenue to others? And how are Amazon and Ipsy capable of gaining market share in this competitive yet shifting environment?

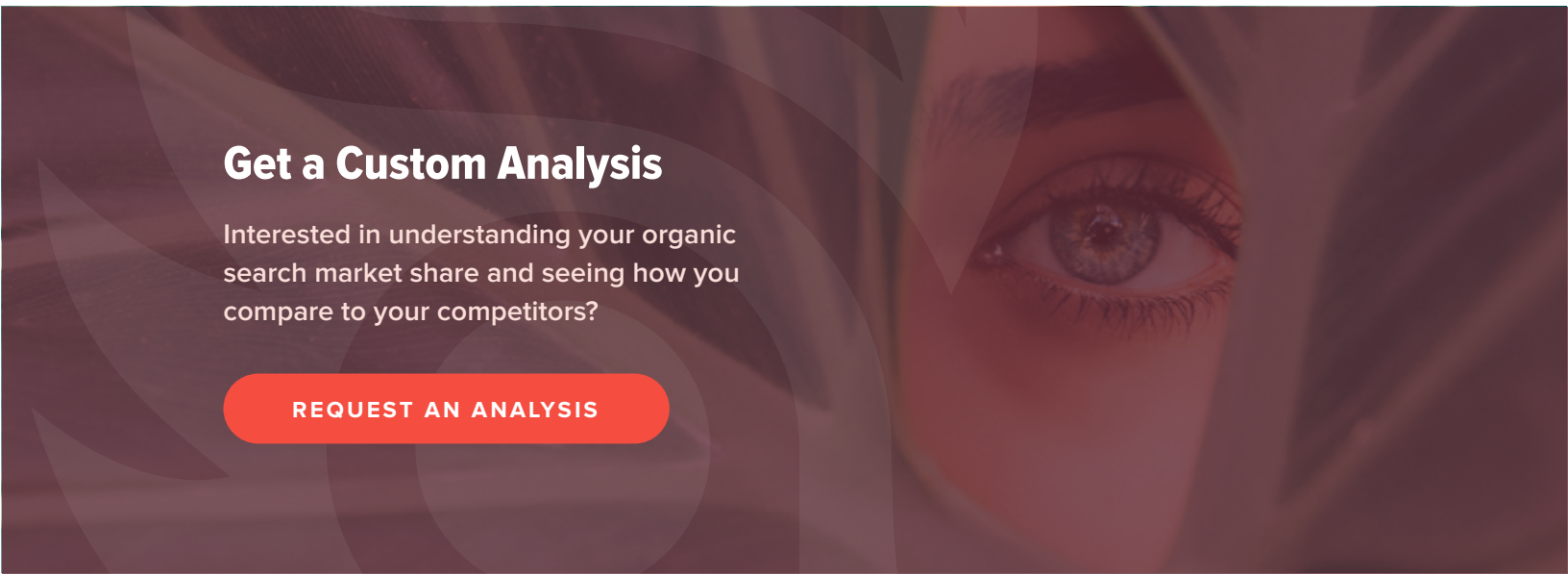
A Deeper Dive

Of course, different brands offer different products and focus on different topics, so it's important to analyze the data at a more granular level in order to fully understand the organic search performance across the Makeup market. To that end, you can find a further breakdown of the (1) Face (2) Eye, and (3) Lip sectors below.

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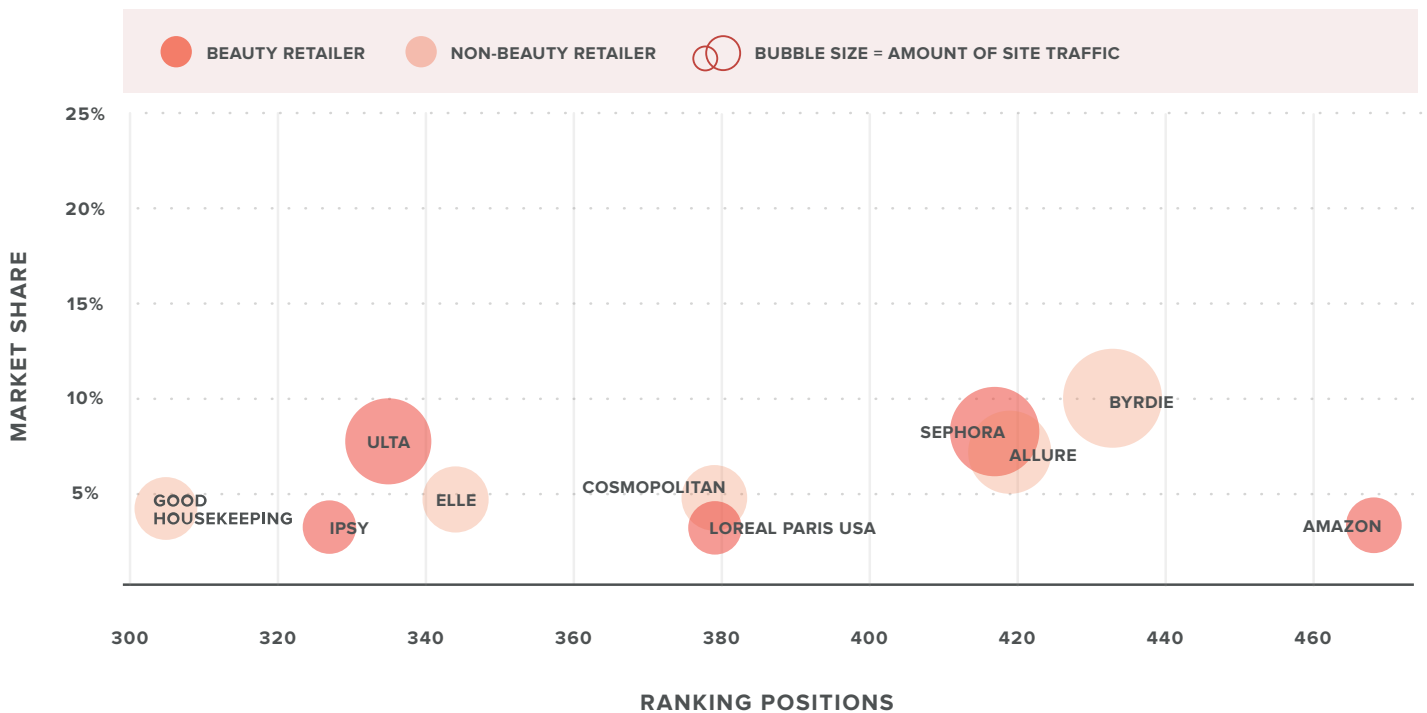


Makeup

Face

MAKEUP: FACE

FIGURE 22



Terakeet’s analysis of the Face sector of the Makeup market involved 394 high-value keywords with a total monthly Google organic search volume of 1,216,670.

When looking at the Face sector, once again, we see many publishers, informational websites, and non-beauty retailers capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 21 positions in market share, 15 (71.43%) are non-beauty brands / non-beauty retailers. Together, they hold a 43.39% market share, representing 352,000+ in monthly website traffic from 3,377 rankings.

That’s approximately 4,228,000 website visits that established beauty brands offering products in the Face sector are not seeing every year.

Keep in mind that this is a fraction of the entire market of terms being searched related to Face Makeup. **When factoring in hundreds of additional, relevant Makeup and Face keywords instead, the organic traffic being lost annually by established beauty brands and retailers is much higher.**



Organic Search Market Share

The Google organic market share for the 394 keywords examined in the Face sector of the Makeup market breaks down as follows:

MARKET SHARE: FACE MAKUP	
COMPANY	MARKET SHARE
byrdie.com	9.93
sephora.com	8.20
ulta.com	7.51
allure.com	6.89
cosmopolitan.com	4.40
elle.com	4.39
goodhousekeeping.com	4.02
Amazon	3.19
lorealparisusa.com	3.10
ipsy.com	3.09
blushlingerie.com	2.23
thecut.com	1.83
harpersbazaar.com	1.59
makeup.com	1.58
Wikipedia	1.35
blushboutiques.com	1.34
pinkblushmaternity.com	1.22
shoppinkblush.com	1.22
glamour.com	1.06
womenshealthmag.com	0.87
healthline.com	0.81

KEY:

- Non-Beauty Retailer
- Beauty Retailer

MORE THAN
70%

of the organic market share for **Face Makeup** is going to **non-beauty retailers**

Given that the top 10 beauty brands in the world are worth more than \$65 billion combined, it's surprising that these established brands are not able to compete more effectively for these highly valuable keywords. To lose out on approximately 4,228,000 site visitors annually for merely a subsection of keywords (and millions of additional site visitors when extrapolating across the entire Face keyword landscape) is a lost opportunity that these companies otherwise have the resources to achieve.



Product vs. Informational Keywords

Of the 394 keywords examined for the Face sector, 338 keywords (85.79%) were identified as informational and 56 as product-related (14.21%). The informational keywords similarly represent 855,450 (70.31%) of the 1,216,670 monthly Google searches.

The top 10 keywords with the highest Google search volumes in the Face sector break down as follows:

KEYWORDS: PRODUCT VS INFO	
KEYWORD	MONTHLY SEARCH VOL
blush	90,500
concealer	60,500
pink blush	49,500
highlighter	40,500
best foundation	33,100
bb cream	33,100
best concealer	22,200
color corrector	22,200
primer makeup	22,200
cc cream	22,200



KEY: SEARCH INTENT	
Informational	
Product	

ONLY **4** OUT OF **10**

of the top 10 keywords are **product-related.**

Given that informational search intent is responsible for the majority of the top ranking Face keywords, it would make sense for beauty brands to target informational keywords in their marketing efforts.



Informational Search

Which brands are capturing the largest share of searches with informational search intent? It's not that different from who is winning overall in the Face sector.

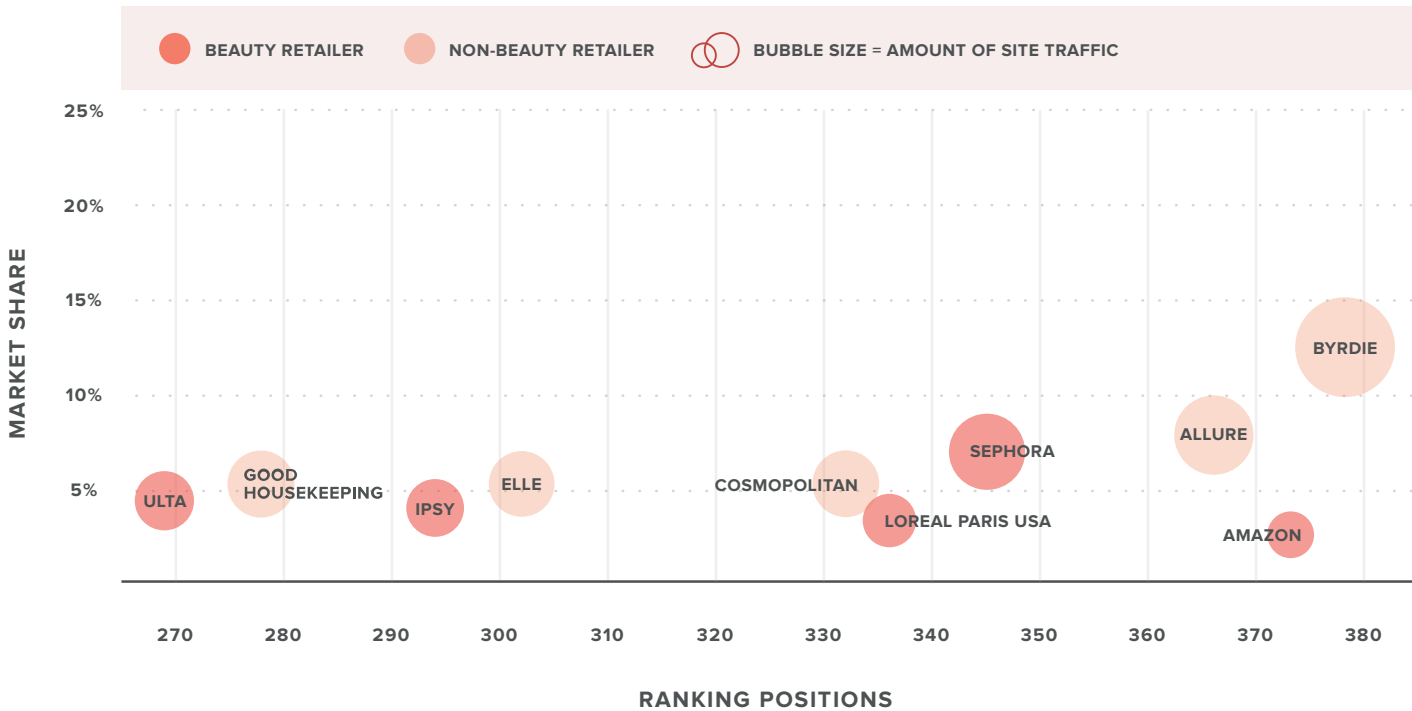
Byrdie.com leads the way with 12.38% market share followed by Allure.com (7.83%), Sephora.com (7.03%), Cosmopolitan.com (5.36%), and Elle.com (5.36%). Out of the top 24 market share holders, non-beauty brands and non-retailers have 53.19% of the organic market share for informational keywords.

See the data below for additional details:



MAKEUP: FACE / INFO

FIGURE 23



MAKEUP: FACE / INFO	
COMPANY	MARKET SHARE
byrdie.com	12.38
allure.com	7.83
sephora.com	7.03
cosmopolitan.com	5.36
elle.com	5.36
goodhousekeeping.com	5.33
ulta.com	4.36
ipsy.com	4.08
lorealparis.com	3.38
amazon.com	2.61
thecut.com	2.23
harparsbazaar.com	2.06
makeup.com	1.88
wikipedia.com	1.39
healthline.com	1.12
glamour.com	1.5
huffpost.com	0.97
womenshealthmag.com	0.93
pinterest.com	0.85
fashionista.com	0.82
vogue.com	0.82
masterclass.com	0.82
marieclaire.com	0.78
whowhatwear.com	0.76



KEY:

- Non-Beauty Retailer
- Beauty Retailer

NEARLY
80%

of the top ranking
Face Makeup results
are going to **non-**
beauty retailers



Product Search

In comparison, the Google organic market share for product-related keywords, again representing 361,220 monthly searches, includes more beauty brands and retailers than the informational keywords. This makes sense, given the product-focused nature of their businesses.

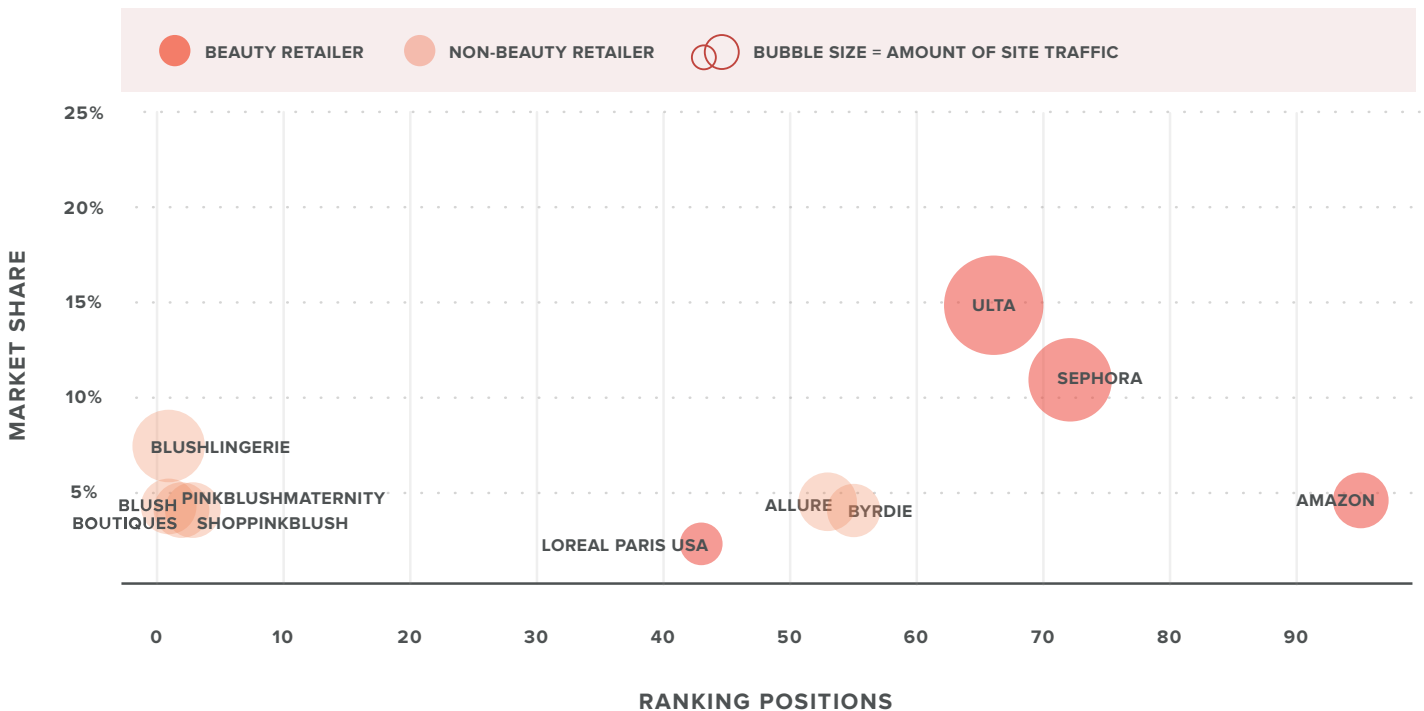
However, it may be surprising for those in the industry to see publishers, non-beauty brands, and non-beauty retailers as well capturing 37.90% of these types of searches. In fact, 15 of the top 24 brands are non-beauty brands and non-beauty retailers.

For every search that these websites capture, there's a greater volume of lost revenue among the beauty brands and retailers. As noted earlier, it's surprising that companies with such vast resources are **allowing this organic market share to go to those who are not even selling beauty products.**

So, which beauty brands and retailers are capturing the most Google market share for product-related keywords? See the data as follows:

MAKEUP: FACE / PRODUCT

FIGURE 24



MAKEUP: FACE / PRODUCT	
COMPANY	MARKET SHARE
ulta.com	14.98
sephora.com	10.97
blushlingerie.com	7.51
allure.com	4.64
amazon	4.58
blushboutiques.com	4.50
byrdie.com	4.14
pinkblushmaternity.com	4.11
shoppinkblush.com	4.11
lorealparisusa.com	2.45
cosmopolitan.com	2.13
elle.com	2.09
fentybeauty.com	2.03
merriam-webster.com	1.88
facebook.com	1.70
elfcosmetics.com	1.49
Wikipedia	1.24
urbandecay.com	0.97
blushmark.com	0.94
goodhousekeeping.com	0.91
makeup.com	0.88
thecut.com	0.87
Nordstrom	0.78
shopblush.com	0.75

↑

KEY:
 Non-Beauty Retailer
 Beauty Retailer

Compare to Paid Search Costs

Understanding that many beauty brands turn to paid search to compete in the search engines, let's examine what it would cost to try to compete for those 4,228,000 lost site visitors mentioned previously in the Face Makeup space.

Assuming an average cost-per-click of \$1.50 to \$3, capturing this traffic through paid search would cost \$6.3 to \$12.7 million annually.

And again, extrapolated across the larger keyword landscape, the cost would be higher. Clearly, it's beneficial to secure as many of these searches through organic search as possible. The cost-per-lead via organic search would be a fraction of that of paid search.

Market Share Trends

Terakeet examined pre-pandemic through post-pandemic (February 2019 - February 2021) market share trends. During that period, Sephora went from having the largest market share to the second largest behind publisher Byrdie, losing 4.48 percentage points in share in the process. Similarly, Ultra dropped from 10.39% market share to 7.51%.

Conversely, publishers and blogs have snatched up an eye-popping amount of market share through the pandemic. Byrdie increased its share more than 5.3X—from 1.87% to 9.93% during the two-year period. Goodhousekeeping.com went from 1.08% to 4.02% during that time.

Amazon and Ipsy experienced the greatest market share increases for retailers in the Face sector from February 2019 to February 2021. Amazon increased its market share from 1.26% to 3.19%. Ipsy went from not even ranking 2019 to owning 3.09% of the market in 2021. This is consistent with both company's strength in Makeup overall.

Interestingly, most websites that held significant market share in February 2019 either held steady or lost share in the subsequent two years as competition among the brands tightened significantly.



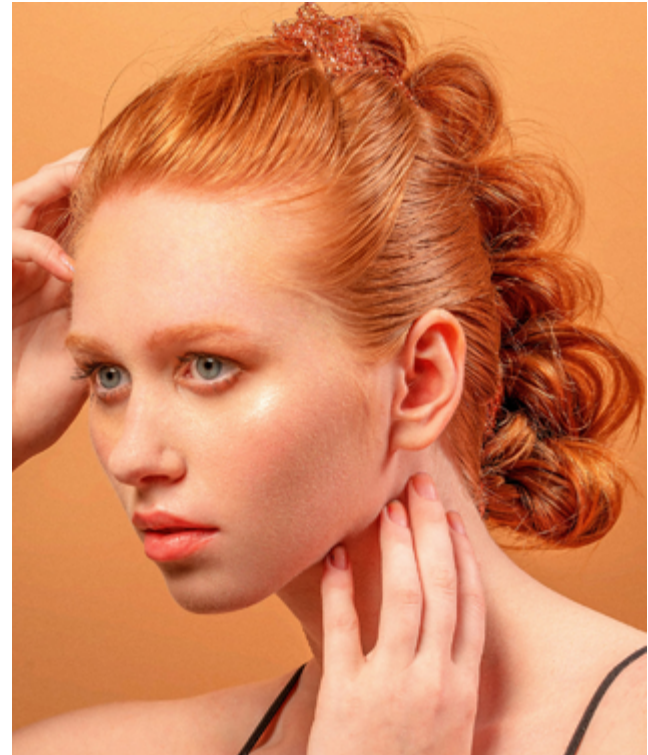
Conclusion

In the Face sector of the Makeup market, many beauty publications and other non-beauty brands and non-beauty retailers are capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 21 positions in market share for the 349 high-value keywords analyzed, 15 are non-beauty brands / non-retailers. Together, they hold a 43.39% market share, representing 352,000+ in monthly website traffic from 3,377 rankings.

As mentioned earlier, that's approximately 4,228,000 website visits that established beauty brands and retailers offering Face products are not seeing every year. When factoring in hundreds of additional, relevant Makeup and Face keywords, the organic traffic being lost annually by established beauty brands and retailers is much higher.

When looking exclusively at product-focused keywords for which one would expect beauty brands and retailers to dominate in Google, publishers and other websites that do not even sell beauty products are capturing 37.90% of the Google organic market share. This is a lost opportunity for beauty brands and retailers.

Amazon and Ipsy are the lone retailers that have been capturing significant market share increases in the Face sector. They are an outlier compared to the other retailers in the space.



There's a market opportunity to attract millions of site visitors actively seeking Face products and related information via Google. Beauty brands offering products within the Face sector need to consider the entire competitive landscape, and not only traditional offline competitors, when approaching organic search. By better understanding the competitive landscape, established beauty brands can compete against beauty publishers and informational websites more effectively and secure more site traffic, orders, and customers.

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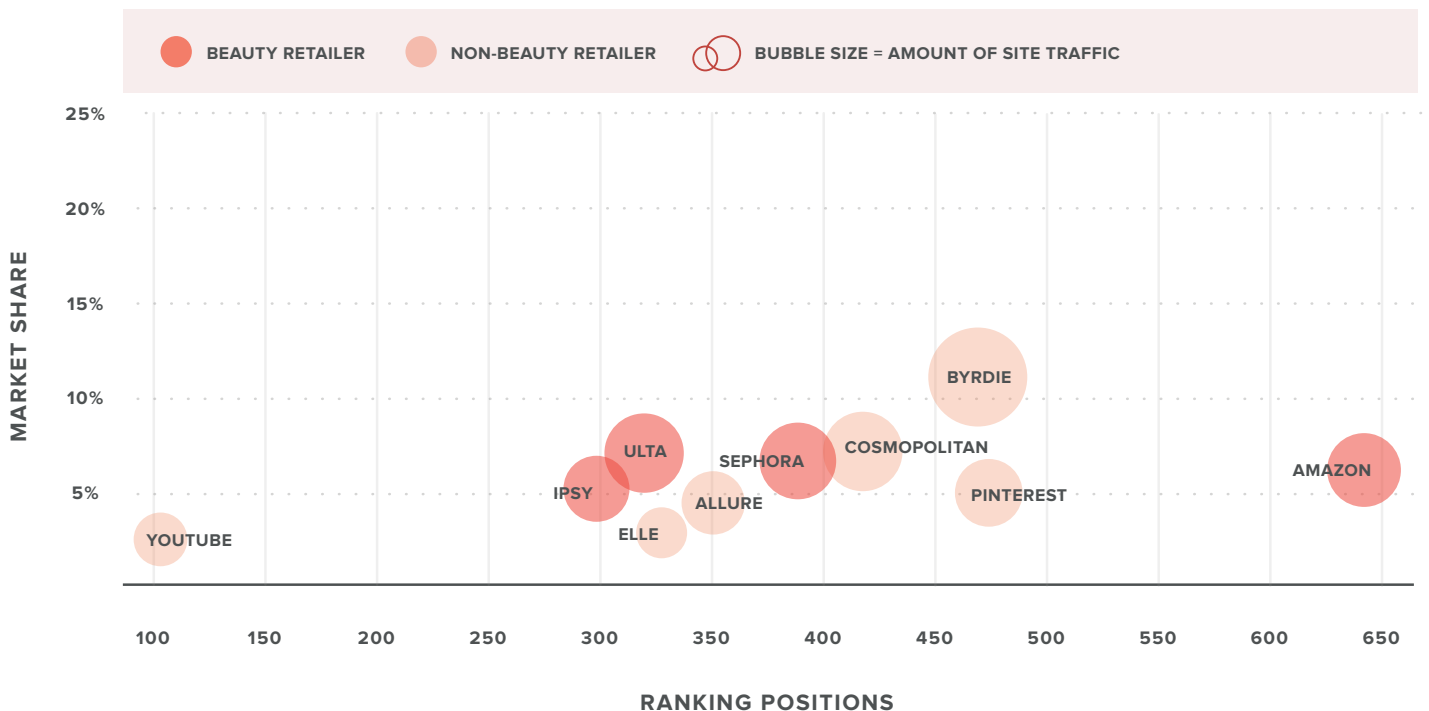
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Makeup Eye

MAKEUP: EYE

FIGURE 25



Terakeet’s analysis of the Eye sector of the Makeup market involved 414 high-value keywords with a total monthly Google organic search volume of 1,445,980.

When looking at the Eye sector, once again, we see many publishers and informational websites capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 23 positions in market share, 16 (69.57%) are non-beauty brands / non-beauty retailers. Together, they hold a 45.56% Google organic search market share, representing more than 439,811 in monthly website traffic from 4,571 keyword rankings.

That’s approximately 5.27 million website visits that established beauty brands offering products in the Eye market sector are not seeing every year.

Keep in mind that this is a fraction of the entire market of terms being searched related to Eye Makeup. **When factoring in hundreds of additional, relevant Makeup and Eye keywords instead, the organic traffic being lost annually by established beauty brands and retailers is much higher.**



Organic Search Market Share

The Google organic market share for the 414 keywords examined in the Eye sector of the Makeup market breaks down as follows

MARKET SHARE: EYE MAKEUP	
COMPANY	MARKET SHARE
byrdie.com	10.99
cosmopolitan.com	7.07
ulta.com	6.95
sephora.com	6.46
Amazon	6.06
ipsy.com	5.05
pinterest.com	4.86
allure.com	4.28
elle.com	2.69
Youtube	2.27
nymag.com	2.20
goodhousekeeping.com	2.15
maybelline.com	1.98
harpersbazaar.com	1.93
oprahmag.com	1.69
lorealparisusa.com	1.58
bustle.com	1.11
vogue.com	1.06
makeup.com	0.89
stylecraze.com	0.81
bhcosmetics.com	0.79
wikihow.com	0.79
glamour.com	0.77



KEY:

- Non-Beauty Retailer
- Beauty Retailer

NEARLY
70%

of the top ranking sites for Eye Makeup are non-beauty retailers

Given that the top 10 beauty brands in the world are worth more than \$65 billion combined, it's surprising that these established brands are not able to compete more effectively for these highly valuable keywords. To lose out on approximately 5.27 million site visitors annually for merely a subsection of keywords (and millions of additional site visitors when extrapolating across the entire Eye keyword landscape) is a lost opportunity that these companies otherwise have the resources to achieve.




Product vs. Informational Keywords

Of the 414 keywords examined for the Eye sector, 322 keywords (77.78%) were identified as informational and 92 were product-related (22.22%). The informational keywords similarly represent 1,003,130 (69.37%) of the 1,445,980 monthly Google searches.

The top 10 keywords examined with the highest Google search volumes in the Eye sector break down as follows:

KEYWORDS: PRODUCT VS INFO	
KEYWORD	MONTHLY SEARCH VOL
eyeshadow looks	110,000
eyeshadow	60,500
mascara	60,500
best mascara	49,500
makeup palette	49,500
eyeshadow palette	49,500
eye makeup	40,500
eyelash serum	27,100
eyeliner looks	27,100
eyebrow pencil	27,100



KEY: SEARCH INTENT	
Informational	
Product	

ONLY
4 OUT OF **10**

of the top 10 keywords are **product-related.**

Given that informational search intent is responsible for the majority of the top ranking keywords, it would make sense for beauty brands to target informational keywords in their marketing efforts beyond product keywords.





Informational Search

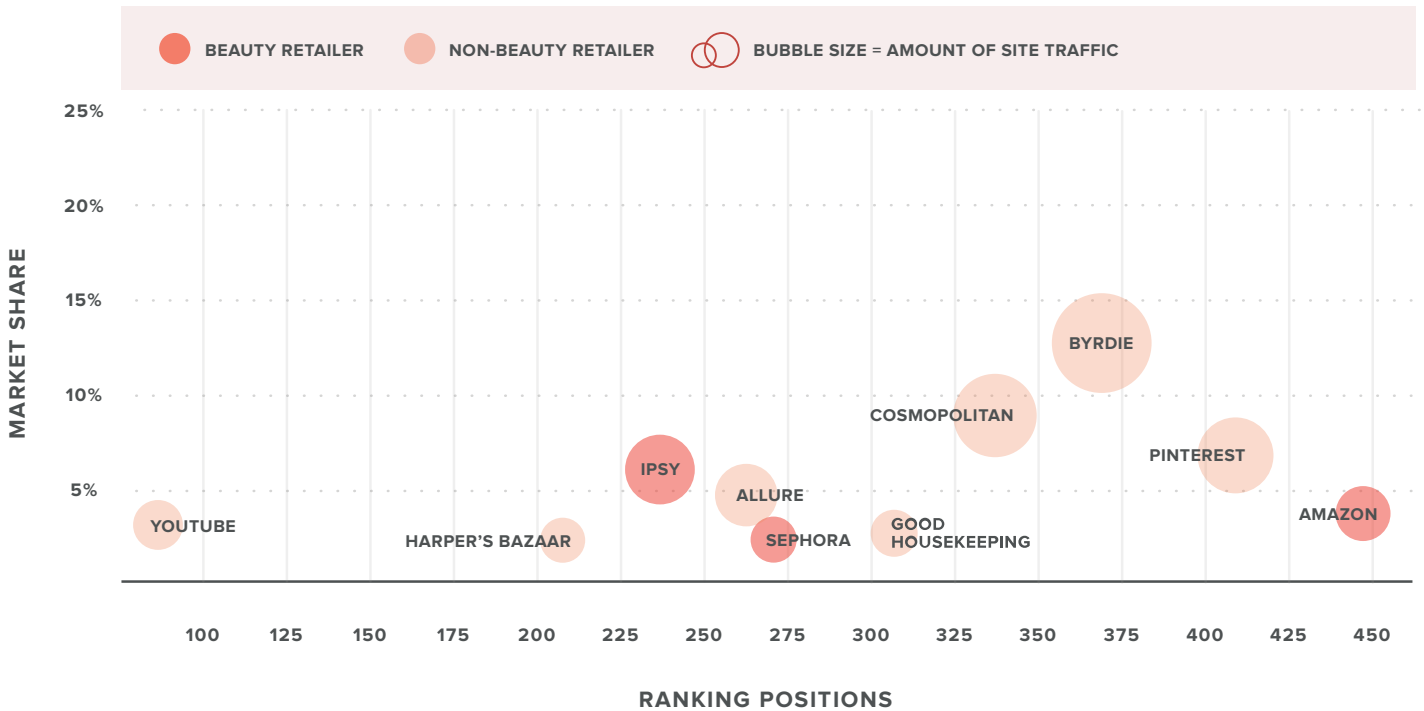
Which brands are capturing the largest share of searches with informational search intent? It's not that different from who is winning overall in the Eye sector.

Byrdie leads the way with 12.85% market share followed by Cosmopolitan.com (9.09%), Pinterest.com (6.94%), Ipsy.com (6.19%), and Allure.com (4.87%). Out of the top 27 market share holders, non-retailers have 60.06% of the organic market share for informational keywords.

See the data below for additional details:

MAKEUP: EYE / INFO

FIGURE 26



MAKEUP: EYE / INFO

COMPANY	MARKET SHARE
byrdie.com	12.85
cosmopolitan.com	9.09
pinterest.com	6.94
ipsy.com	6.19
allure.com	4.87
Amazon	3.93
Youtube	3.27
goodhousekeeping.com	2.85
sephora.com	2.53
harpersbazaar.com	2.47
oprahmag.com	2.37
nymag.com	2.32
maybelline.com	2.18
lorealparisusa.com	2.03
bustle.com	1.58
elle.com	1.54
ulta.com	1.43
makeup.com	1.16
wikihow.com	1.14
vogue.com	1.07
stylecraze.com	1.07
health.com	1.06
marieclaire.com	0.99
buzzfeed.com	0.98
shape.com	0.87
herstylecode.com	0.8
glamour.com	0.77



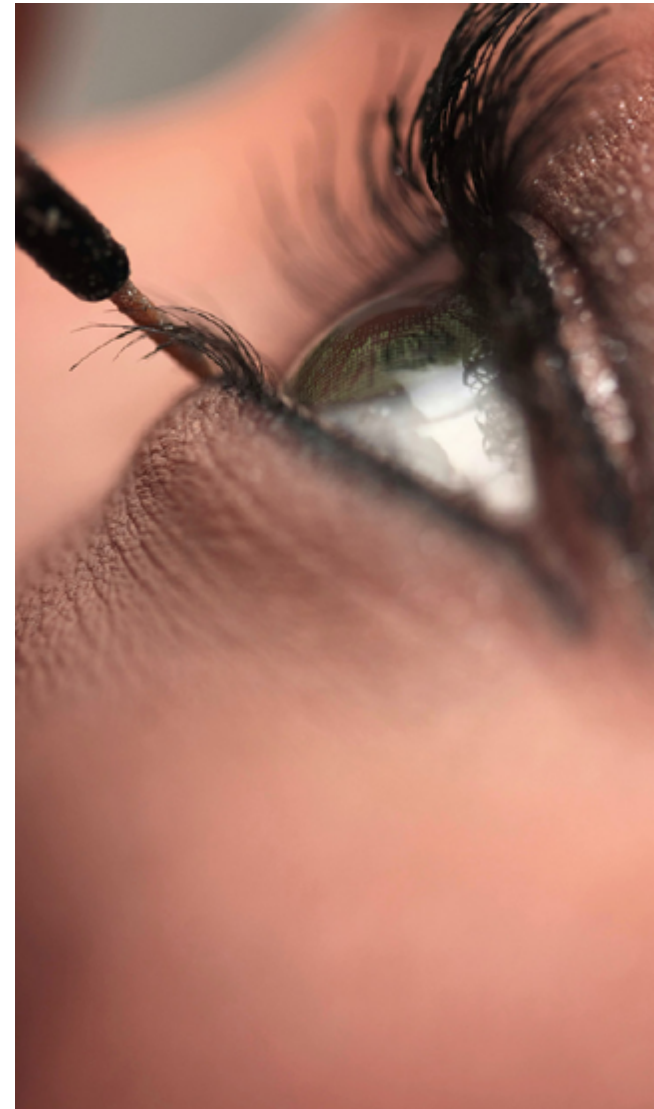
KEY:

Non-Beauty Retailer

Beauty Retailer

ROUGHLY
77%

of the top ranking **Eye Makeup** results are going to **non-beauty retailers**



Product Search

In comparison, the Google organic market share for product-related keywords, again representing 442,850 monthly searches, includes more beauty brands and retailers than the informational keywords. This makes sense, given the product-focused nature of their businesses.

However, it may be surprising for those in the industry to see so many publishers, non-beauty brands, and non-beauty retailers as well capturing a sizable percentage of market share for these types of searches. In fact, 10 of the top 22 market share holders are non-beauty brands and non-beauty retailers. And overall, the publishers, non-beauty brands, and non-beauty retailers are capturing 24.19% of the available searches for these product keywords.

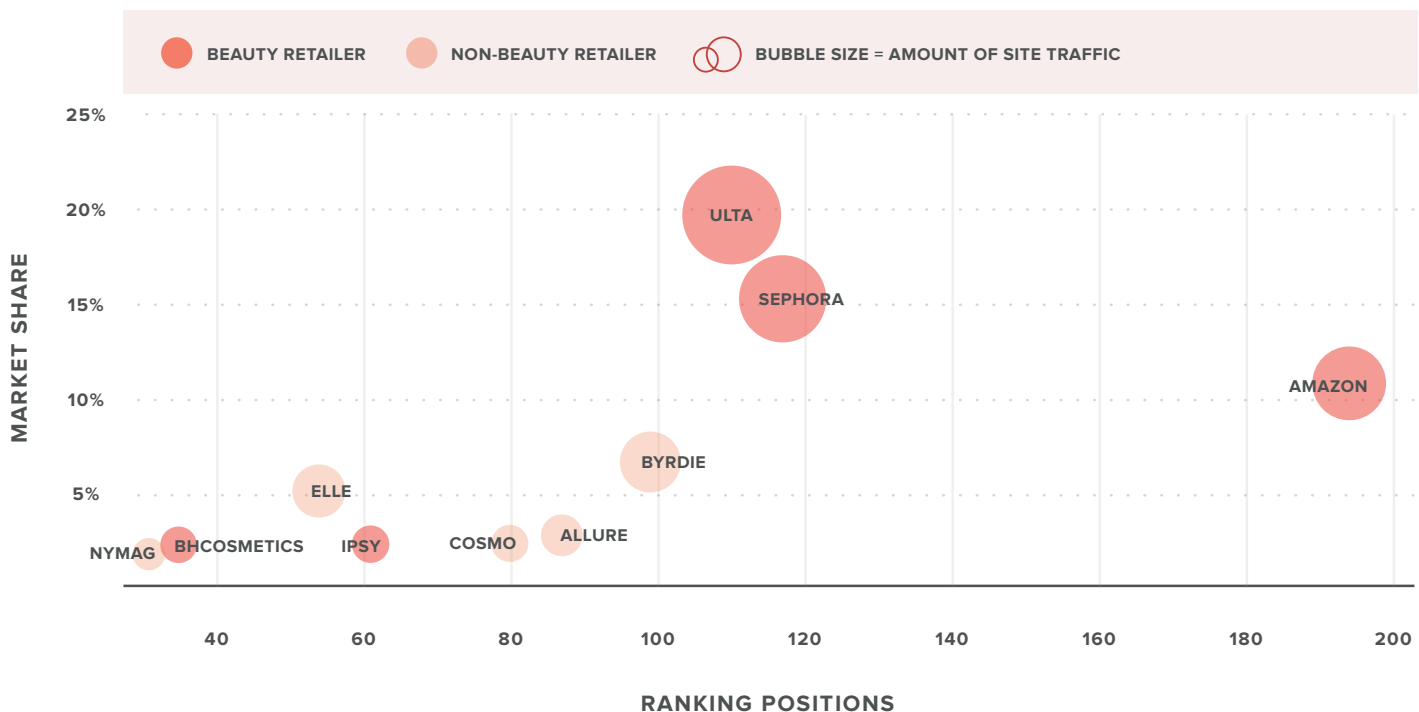
That’s nearly 1 in 4 Eye product-focused searches going to non-beauty brands and non-beauty retailers.

For every search that these websites capture, there’s a greater volume of lost revenue among the beauty brands and retailers. As noted earlier, it’s surprising that companies with such vast resources are **allowing so much organic market share to go to those who are not even selling beauty products.**

So, which beauty brands and retailers are capturing the most Google market share for product-related keywords? See the data as follows:

MAKEUP: EYE / PRODUCT

FIGURE 27



MAKEUP: EYE / PRODUCT	
COMPANY	MARKET SHARE
ulta.com	19.48
sephora.com	15.34
Amazon	10.90
byrdie.com	6.76
elle.com	5.30
allure.com	2.94
cosmopolitan.com	2.51
bhcosmetics.com	2.45
ipsy.com	2.45
nymag.com	1.92
maybelline.com	1.52
Target	1.09
thrivecausemetics.com	1.08
Wikipedia	1.06
vogue.com	1.03
instyle.com	1.03
nyxcosmetics.com	0.98
milanicosmetics.com	0.91
morphe.com	0.91
anastasiabeverlyhills.com	0.87
colourpop.com	0.86
glamour.com	0.78

↑

KEY:

Non-Beauty Retailer

Beauty Retailer

Compare to Paid Search Costs

Understanding that many beauty brands turn to paid search to compete in the search engines, let's examine what it would cost to try to compete for those 5.27 million lost site visitors mentioned previously in the Eye space. Assuming an average cost-per-click of \$1.00 to \$2.50, capturing this traffic through paid search would cost \$5.27 million to \$13.18 million annually.

And again, extrapolated across the larger keyword landscape, the cost would be higher. Clearly, it's beneficial to secure as many of these searches through organic search as possible. The cost-per-lead via organic search would be a fraction of that of paid search.

Market Share Trends

When looking at the product and informational keywords within the Eye sector, outside of Amazon and Ipsy, beauty brands and retailers have been weak throughout the two-year period of February 2019 through February 2021.

Amazon increased market share from 4.65% to 6.06% during that time. Ipsy.com skyrocketed from zero all the way to 5.05% market share, capturing the 6th spot overall in the Eye sector in the process.

Conversely, Sephora experienced a steep decline dropping from 10.80% market share to 6.46% within the 24-month period, dropping from the market share leader to fourth in share. Similarly, Ultra dropped from 8.12% to 6.95%.

On the publisher and informational website side of things, Byrdie went from 1.42% to 10.99%, seizing the highest market share. Cosmopolitan increased from 5.92% to 7.07%. But similar to the beauty brands and beauty retailers, publishers and informational websites outside of Byrdie and Cosmopolitan lost market share for the most part over the February 2019 to February 2021 time period.

Overall, competition in the Eye Makeup sector is tightening, but it cannot be ignored that the two top market share holders in February 2021 don't even sell Eye Makeup products.



BYRDLE CASE STUDY:

How the Beauty Blog Increased Google Organic Market Share by 12X to Outrank Competitors.

[VIEW CASE STUDY](#)

Conclusion

In the Eye sector of the Makeup market, many beauty publications and other non-beauty brands and non-beauty retailers are capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 23 positions in market share for the 414 high-value keywords analyzed, 16 are non-beauty brands / non-beauty retailers. Together, they hold a 45.56% Google organic search market share, representing more than 439,811 in monthly website traffic from 4,571 keyword rankings.

As mentioned earlier, that's approximately 5.27 million website visits that established beauty brands and retailers offering Eye products are not seeing every year. When factoring in hundreds of additional, relevant Makeup and Eye keywords, the organic traffic being lost annually by established beauty brands and retailers is much higher.

Even when looking exclusively at product-focused keywords for which one would expect beauty brands and retailers to dominate in Google, publishers and other websites that do not even sell beauty products are capturing 24.19% of the Google organic market share — nearly a quarter of all the corresponding search traffic.



There's a market opportunity to attract millions of site visitors actively seeking Eye products and related information via Google. Beauty brands offering products within the Eye sector need to consider the entire competitive landscape, and not only traditional offline competitors, when approaching organic search. By better understanding the competitive landscape, established beauty brands can compete against beauty publishers and informational websites more effectively and secure more site traffic, orders, and customers.

Get a Custom Analysis

Interested in understanding your organic search market share and seeing how you compare to your competitors?

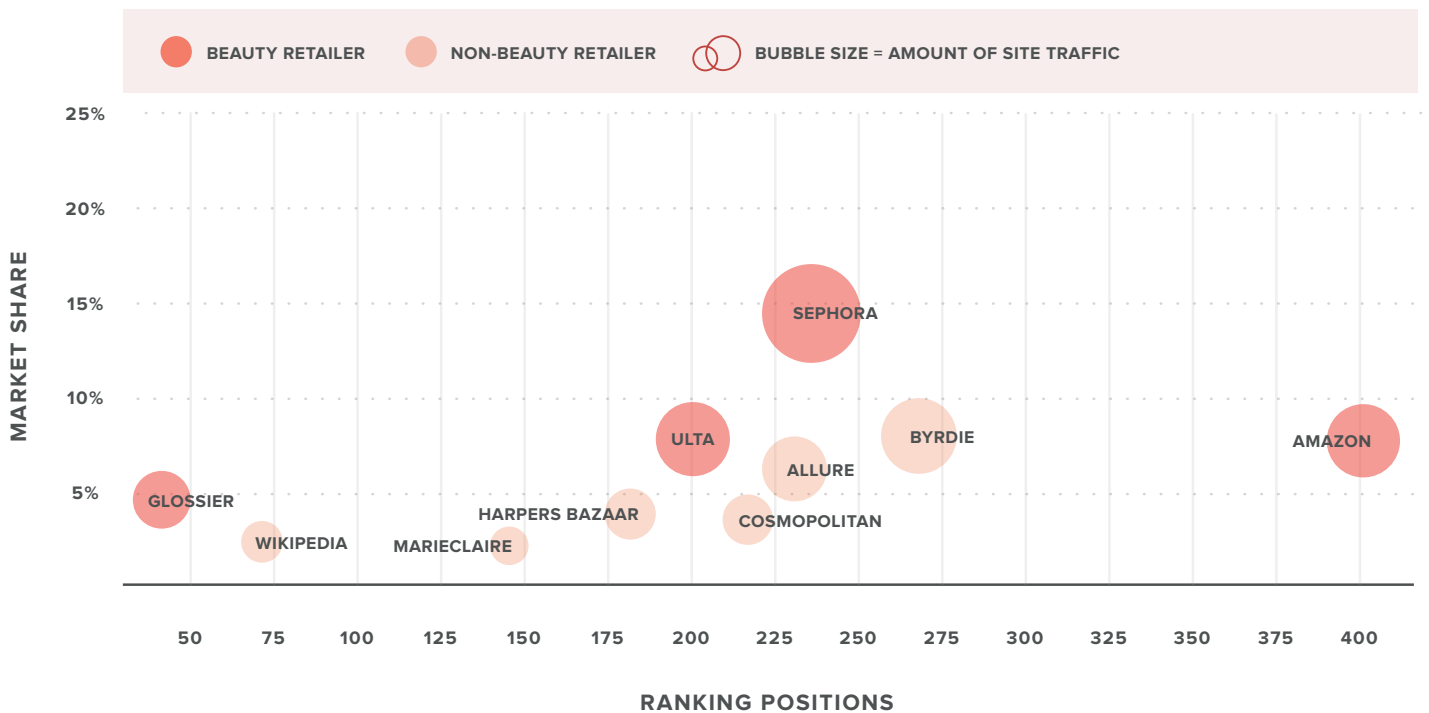
[REQUEST AN ANALYSIS](#)

Makeup

Lip

MAKEUP: LIP

FIGURE 28



Terakeet’s analysis of the Lip sector of the Makeup market involved 240 high-value keywords with a total monthly Google organic search volume of 776,820.

When looking at the Lip sector, once again, we see many publishers and informational websites capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 23 positions in market share, 12 (52.17%) are non-beauty brands / non-beauty retailers. Together, they hold a 33.54% market share, representing 173,926 in monthly website traffic from 2,024 rankings.

That’s approximately 2.08 million website visits that established beauty brands offering products in the Lip market sector are not seeing every year.

Keep in mind that this is a fraction of the entire market of terms being searched related to Lip Makeup. **When factoring in hundreds of additional, relevant Makeup and Lip keywords instead, the organic traffic being lost annually by established beauty brands and retailers is much higher.**



Organic Search Market Share

The Google organic market share for the 240 keywords examined in the Lip sector of the Makeup market breaks down as follows:

MARKET SHARE: LIP MAKEUP	
COMPANY	MARKET SHARE
sephora.com	14.39
byrdie.com	8.16
ulta.com	7.83
Amazon	7.75
allure.com	6.22
glossier.com	4.50
harpersbazaar.com	3.77
cosmopolitan.com	3.47
Wikipedia	2.31
marieclaire.com	2.08
elle.com	1.96
maccosmetics.com	1.71
ipsy.com	1.63
goodhousekeeping.com	1.38
nymag.com	1.25
maybelline.com	1.10
bhcosmetics.com	1.02
nyxcosmetics.com	1.02
seventeen.com	1.01
pinterest.com	0.97
oprahmag.com	0.96
elfcosmetics.com	0.92



KEY:

Non-Beauty Retailer

Beauty Retailer

NEARLY
60%

of the organic market share for **Lip Makeup** is going to **non-beauty retailers**

Given that the top 10 beauty brands in the world are worth more than \$65 billion combined, it's surprising that these established brands are not able to compete more effectively for these highly valuable keywords. To lose out on approximately 2.08 million site visitors annually for merely a subsection of keywords (and millions of additional site visitors when extrapolating across the entire Lip keyword landscape) is a lost opportunity that these companies otherwise have the resources to achieve.



Product vs. Informational Keywords

Searches for informational keywords primarily lead to Google results featuring content such as listicles and other blog posts, guides and how-to videos. The search intent is to find or discover content, information, or answers. Non-branded product keywords drive product-specific Google results and point-of-purchase marketing. The search intent is to find a certain type of product (and in many cases to purchase that product), although the searcher has not indicated a brand preference.

Of the 240 keywords examined for the Lip sector, 174 keywords (72.50%) were identified as informational and 66 were product-related (27.50%). The informational keywords similarly represent 510,570 (65.72%) of the 776,820 monthly Google searches.

The top 10 keywords with the highest Google search volumes in the Lip sector break down as follows:

KEYWORDS: PRODUCT VS INFO

KEYWORD	MONTHLY SEARCH VOL
lip gloss	135,000
lipstick	60,500
lip plumper	49,500
lip balm	33,100
nude lipstick	18,100
red lipstick	18,100
best lip plumper	18,100
lip plumper gloss	18,100
best lip balm	18,100
lip liner	18,100



KEY: SEARCH INTENT

Informational
Product

ONLY
2 OUT OF **10**
of the top 10 keywords are product-related.

Given the weighting towards informational queries in the search landscape, it would make sense for beauty brands to target informational keywords in their marketing efforts.



Informational Search

Which brands are capturing the largest share of searches with informational search intent? Beauty publishers and bloggers are capturing roughly half the market share in this category.

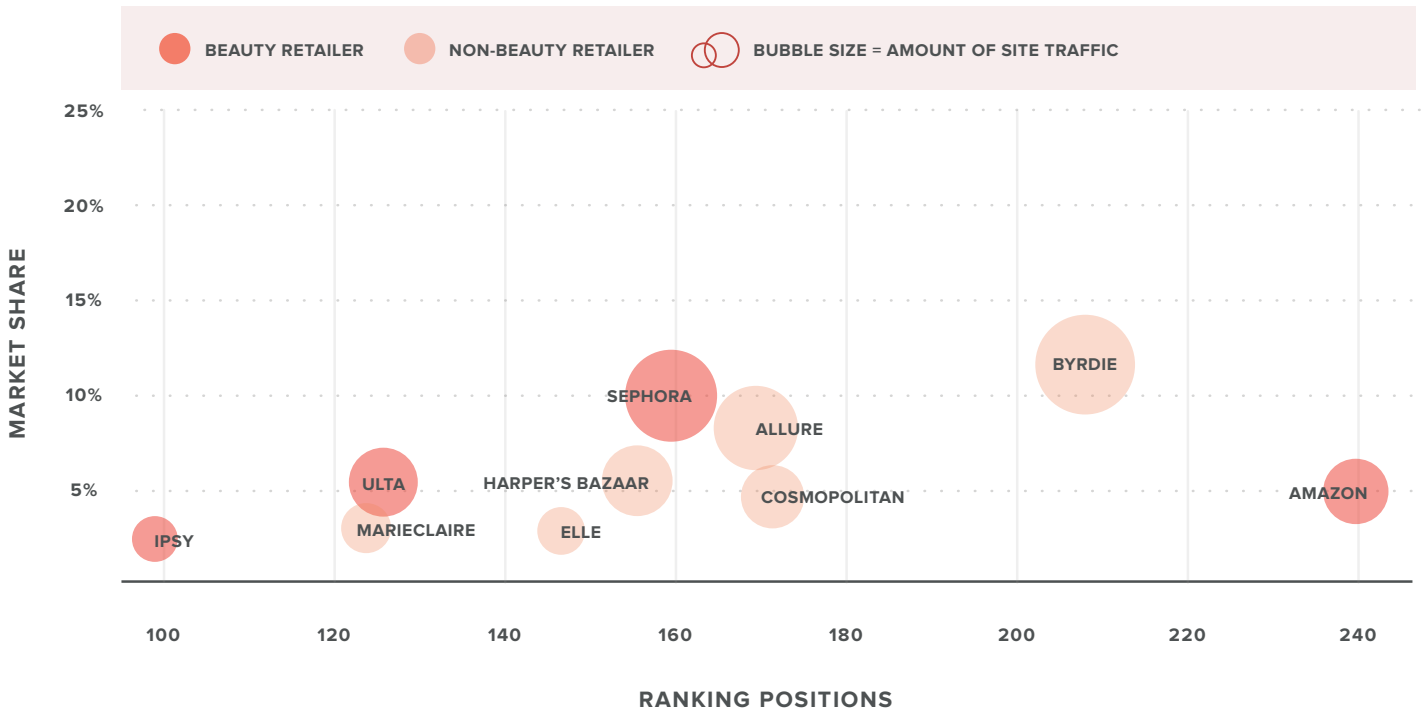
Byrdie.com leads the way with 11.65% market share followed by Sephora.com (10.02%), Allure.com (8.23%), Harpersbazaar.com (5.63%), and Ulta.com (5.47%). Out of the top 23 market share holders, non-beauty brands and non-beauty retailers have 48.81% of the organic market share for informational keywords.

See the data below for additional details:



MAKEUP: LIP / INFO

FIGURE 29



MAKEUP: LIP / INFO	
COMPANY	MARKET SHARE
byrdie.com	11.65
sephora.com	10.02
allure.com	8.23
harpersbazaar.com	5.63
ulta.com	5.47
Amazon	4.98
cosmopolitan.com	4.65
marieclaire.com	2.99
elle.com	2.8
ipsy.com	2.46
Wikipedia	2.3
goodhousekeeping.com	2.06
maccosmetics.com	1.88
nymag.com	1.82
seventeen.com	1.51
pinterest.com	1.42
healthline.com	1.1
oprahmag.com	0.92
whowhatwear.com	0.89
refinery29.com	0.84
mindbodygreen.com	0.84
maybelline.com	0.82
glossier.com	0.81



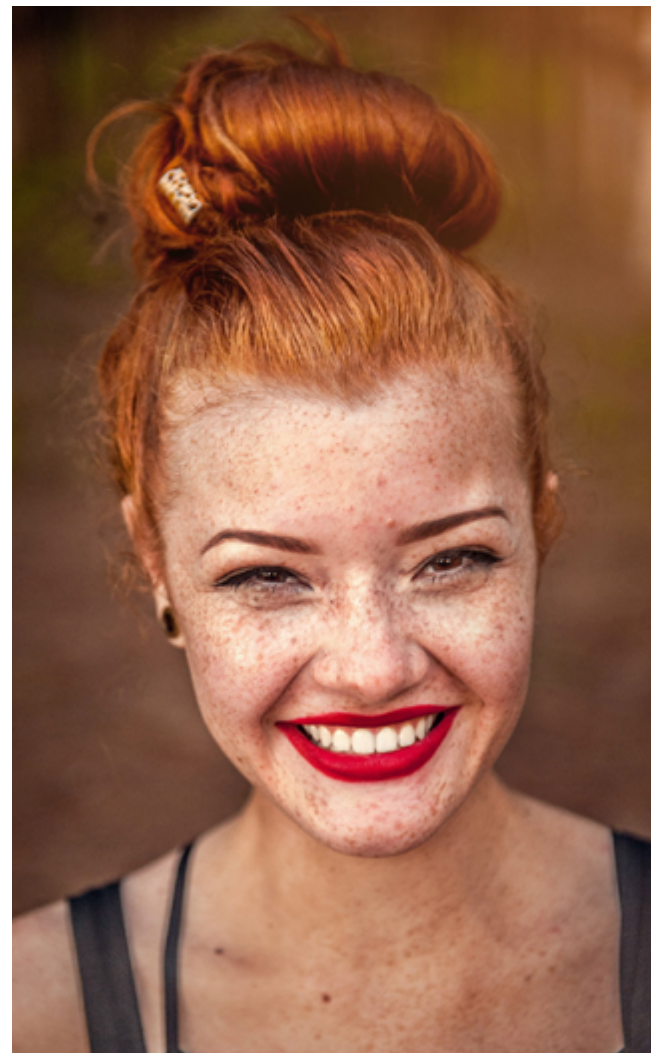
KEY:

Non-Beauty Retailer

Beauty Retailer

MORE THAN
65%

of the top ranking **Lip Makeup** results are going to **non-beauty brands**



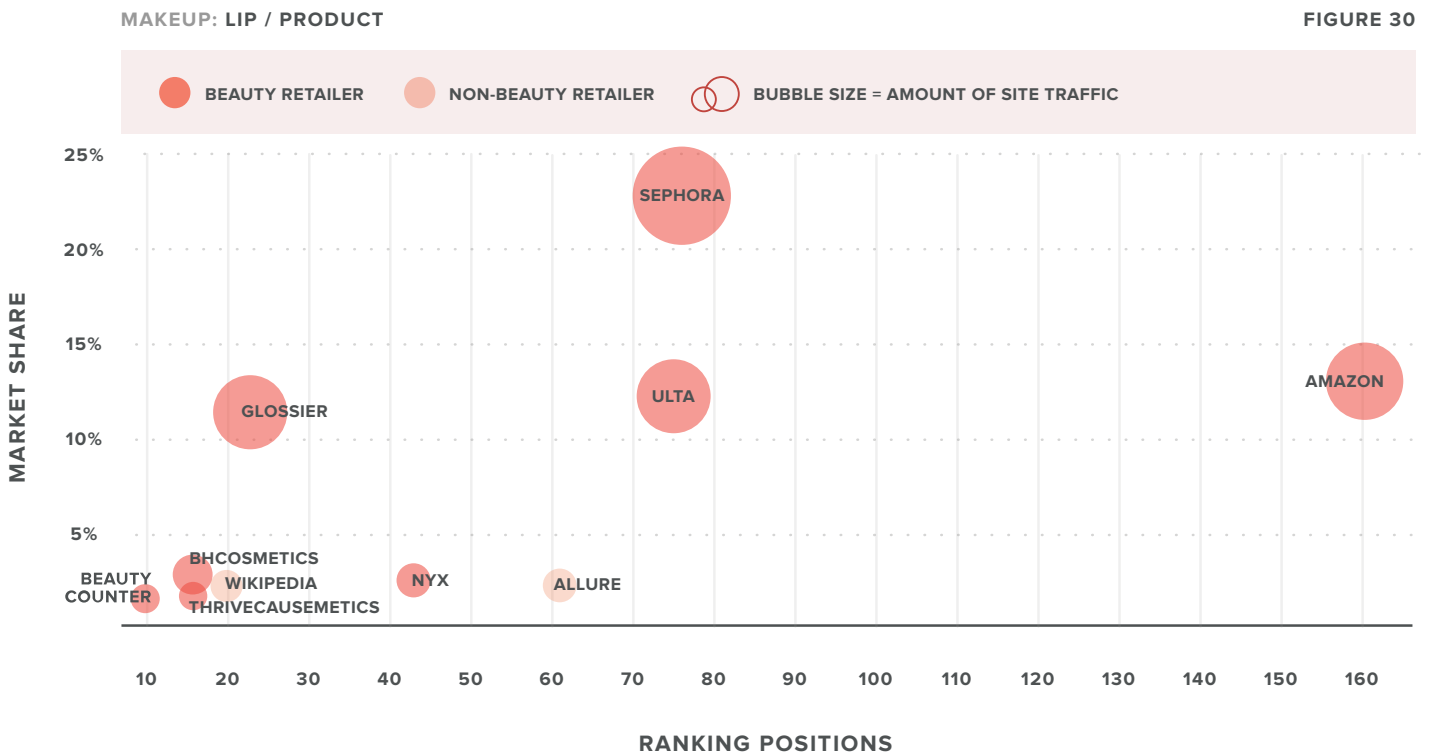
Product Search

In comparison, the Google organic market share for product-related keywords, again representing 266,250 monthly searches, includes more beauty brands and retailers than the informational keywords. This makes sense, given the product-focused nature of their businesses.

Only five out of the top 21 are non-beauty brands and non-beauty retailers. And overall,

the publishers, non-beauty brands, and non-beauty retailers are capturing merely 8.41% of the available searches for these product keywords

So, which beauty brands and retailers are capturing the most Google market share for product-related keywords? See the data as follows:



MAKEUP: LIP / PRODUCT	
COMPANY	MARKET SHARE
sephora.com	22.76
amazon	13.07
ulta.com	12.35
glossier.com	11.57
bhcosmetics.com	2.99
nyxcosmetics.com	2.6
allure.com	2.35
wikipedia	2.34
thrivecausemetics.com	1.87
beautycounter.com	1.73
maybelline.com	1.63
byrdie.com	1.47
maccosmetics.com	1.39
elfcosmetics.com	1.32
cosmopolitan.com	1.21
thelipbar.com	1.07
bareminerals.com	1.04
oprahmag.com	1.04
honest.com	0.98
fentybeauty.com	0.95
itcosmetics.com	0.94

↑

KEY:

Non-Beauty Retailer

Beauty Retailer

Compare to Paid Search Costs

Understanding that many beauty brands turn to paid search to compete in the search engines, let's examine what it would cost to try to compete for those 2.08 million lost site visitors mentioned previously in the Lip space.

Assuming an average cost-per-click of \$1.50 to \$3.00, capturing this traffic through paid search would cost \$3.12 to \$6.24 million annually.

And again, extrapolated across the larger keyword landscape, the cost would be higher. Clearly, it's beneficial to secure as many of these searches through organic search as possible. The cost-per-lead via organic search would be a fraction of that of paid search.

Market Share Trends

Terakeet examined pre-pandemic through post-pandemic (February 2019 - February 2021) market share trends in the Lip space.

Various beauty brands and retailers grew stronger in search market share during this time period. Sephora, with the top spot in both February 2019 as well as February 2021, increased its market share from 12.05% to 14.39%. Amazon also improved during this time period, going from 3.15% to 7.75% (from 7th to 4th in market share). Glossier went from 1.16% to 4.50%, capturing the 6th highest market share.

Byrdie bucked the trend, and as a publisher, grew its market share through the pandemic from 1.94% to 8.16% (4.2X growth), and now holds the number two spot behind Sephora in market share.



Conclusion

In the Lip sector of the Makeup market, many beauty publications and other non-beauty brands and non-beauty retailers are capturing a significant percentage of the Google organic search market share. Among the organizations occupying the top 23 positions in market share for the 240 high-value keywords analyzed, 12 are non-beauty brands / non-retailers. Together, they hold a 33.54% market share, representing 173,926 in monthly website traffic from 2,024 rankings.

As mentioned earlier, that's approximately 2.08 million website visits that established beauty brands and retailers offering Lip products are not seeing every year. When factoring in hundreds of additional, relevant Makeup and Lip keywords, the organic traffic being lost annually by established beauty brands and retailers is much higher.



There's a market opportunity to attract millions of site visitors actively seeking Lip Makeup and related information via Google. Beauty brands offering products within the Lip sector need to consider the entire competitive landscape, and not only traditional offline competitors, when approaching organic search. By better understanding the competitive landscape, established beauty brands can compete against publishers, and informational websites more effectively and secure more site traffic, orders, and customers.

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About Terakeet

Terakeet is the leading provider of technology-enabled services that Fortune 500 companies rely on to grow their business and manage their brands using organic search.

At Terakeet, we take a unique approach to utilizing Google search to engage organic audiences — one that successfully bridges the gap between search engines and people (audiences). Our holistic approach to Enterprise SEO is what has made us successful in delivering sustainable value for our clients.

We derive insights from search engines, the best source of real-time consumer behavior data, to enable enterprise brands to engage organic audiences, dominate markets, and increase brand value. Our solutions and technology bridge the gap between search intent and customer experience (CX), helping brands to better understand their customers' needs and delight them throughout the digital journey.

OUR Carina Technology

Carina is Terakeet's proprietary search engine market share analysis tool. It highlights your brand among your market's top performers and rising challengers to enable your brand to drive strategy, capture market share, and increase

revenue. We help you gain access to a comprehensive look at your past, present, and projected Google organic market presence so that you can seize new opportunities and stay steps ahead of your competitors.

Research Methodology

The data in Terakeet's Google Market Share Report for the beauty industry was captured via **Carina** (see above for more details).

Our team of SEO experts researched the primary keywords in the Skincare, Hair Care, and Makeup markets and more narrowly defined sectors within those markets.

Based on those keywords, Carina gathered the data related to monthly Google organic search engine rankings for those keywords, identifying the websites with the highest market share for the given month, as well as historical performance related to those keywords.

Market share is determined by a combination of Google organic rankings, monthly search volume per keyword, the expected click-through rate per search engine position, and estimated monthly traffic.

Contact Terakeet

Contact us to request a custom market share analysis for your brand. Uncover how you compare to your competitors in organic search performance, how much organic traffic you may be forfeiting to the competition, and the lost opportunity cost for your business.

1.800.655.2724

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