Net Influencer

The GRWM Index Q1 2026

Which brands win share of voice inside YouTube's biggest beauty discovery format, and what their standing should tell a marketing team about **where to spend**.

The first edition of a quarterly benchmark from Net Influencer, built in partnership with creator intelligence firm ThoughtLeaders

1,658
QUALIFYING VIDEOS · Q1

184
BRANDS PAST THRESHOLD

5.0%
LTK SHARE OF VOICE, #1

~95%
OF VIDEOS CARRY NO PAID SPEND

NET INFLUENCER x THOUGHT LEADERS

FIRST EDITION · 2026

Five things the first index makes clear

01 A shopping app leads beauty. **LTK is the single most-seen brand** in beauty Get Ready With Me content on YouTube, holding a **5.0% share of voice**, ahead of every cosmetics brand in the format.

02 Share of voice is overwhelmingly **earned, not bought**. Nearly 90% of brand appearances carried no paid-promotion disclosure, so with **so little paid competition**, the format is wide open to a brand willing to invest.

03 Prestige fell together; the retailer absorbed it. **Huda Beauty, Rare Beauty, and Fenty Beauty** all lost share of voice at once, and a retailer, **Sephora**, absorbed most of what they lost.

04 Frequency and reach are **different races**. **Maybelline** appears in more GRWM videos than any other brand, yet ranks only **third by views**.

05 The format is **widening**. GRWM is beginning to extend beyond beauty into **lifestyle and fashion routine content**.

> “*Beauty brands have spent years buying creator content without a reliable way to measure whether it is working in the formats that actually drive purchase. Get Ready With Me is the most important of those formats, and the index makes one thing clear:* ***share of voice here is earned, not bought****. The brands winning today are the ones creators reach for on their own. But with barely 5% of these videos carrying any paid partnership, the bigger story is how open the format still is.* ***A brand that decides to invest here can shape the conversation in a way it never could in a channel everyone is already buying.***
>
> **Nii Ahene,** Founder, Net Influencer

How this index was built

The GRWM Index measures share of voice three ways, because a brand can lead on one and trail on the others. Read together, the three tell a brand whether it is winning *on attention, on habit, or on spend*.

MEASURE 01 · HEADLINE

Reach

The total views a brand's appearances earned, counted once per video. The truest measure of share of voice, because views, not follower counts, are what a creator's content actually delivers. This is the ranking the leaderboard reports.

MEASURE 02

Frequency

How many GRWM videos a brand appeared in. It measures cultural default, how readily creators reach for a brand at all, regardless of how large the audience watching is.

MEASURE 03

Paid vs Earned

How much of a brand's share of voice it bought through disclosed sponsorship, rather than earned through unpaid creator choice. In this format, earned is the lever that moves the leaderboard.

WHY REACH IS THE DEADLINE

A brand can appear in dozens of videos that almost no one watches, or in a handful that everyone does. Counting **views earned, once per video,** rewards the appearances that actually reach an audience, so the leaderboard is not a tally of how loudly a brand is mentioned, but of **how much attention those mentions commanded**. Frequency and paid-versus-earned then explain why a brand sits where it does.

WINS ON ATTENTION

High reach for the appearance count. Creators with real audiences are choosing the brand.

READ: Reach rank ≫ frequency rank.

WINS ON HABITS

High frequency, lower reach. The brand is a cultural default creators fold in without thinking.

READ: Frequency rank ≫ reach rank.

WINS ON SPEND

A high disclosed-paid share. A constructed position, not organic pickup, and the rarest way to lead here.

READ: Elevated paid %.

Top 50 brands by share of voice • 1–25

Across 1,658 qualifying long-form GRWM videos in Q1 2026, 184 brands cleared the three appearance threshold. Share of voice is measured by views, counted once per video; the bar is scaled to the leader (LTK, 5.03%). Paid mix splits a brand's appearances into paid / earned. Shopping apps are tracked alongside product brands and labeled as such, they earn voice from description links, not on-camera mentions.

#	BRAND	TYPE	VIDS	VIEWS	SHARE OF VOICE	PAID	VS Q4
1	LTK	SHOPPING APP	53	3.95m	5.03%		+200%
2	Sephora	BEAUTY RETAILER	41	2.13M	2.71%		+232%
3	Maybelline	BEAUTY	83	1.02M	1.30%		+52%
4	ShopMy	BEAUTY RETAILER	43	844k	1.07%		+75%
5	Rare Beauty	BEAUTY	41	655k	0.83%		-52%
6	Huda Beauty	BEAUTY	39	558k	0.71%		-68%
7	Bobbi Brown	BEAUTY	10	481k	0.61%		+197%
8	Makeup by Mario	BEAUTY	23	436k	0.55%		-31%
9	Anastasia Beverly Hills	BEAUTY	19	413k	0.52%		+149%
10	Kosas	BEAUTY	15	266k	0.47%		-31%
11	Dior	BEAUTY	26	363k	0.46%		-23%
12	Morphe	BEAUTY	34	356k	0.45%		+137%
13	BK Beauty	BEAUTY TOOLS	26	350k	0.45%		+22%
14	YSL	BEAUTY	20	349k	0.44%		-24%
15	TOO FACED	BEAUTY	37	348k	0.44%		-27%
16	FENTY BEAUTY	BEAUTY	25	333K	0.42%		-60%
17	CHANEL	BEAUTY	35	327K	0.42%		-3%
18	rephr	BEAUTY TOOLS	25	308k	0.39%		+83%
19	Garnier	BEAUTY	6	287k	0.37%		+213%
20	Armani	BEAUTY	11	287k	0.36%		+43%
21	Summer Fridays	BEAUTY	8	279k	0.35%		NEW
22	Revlon	BEAUTY	17	269k	0.34%		+143%
23	natasha Denona	BEAUTY	28	240k	0.31%		-30%
24	CoverGirl	BEAUTY	39	228k	0.29%		+20%
25	Melt Cosmetics	BEAUTY	7	218k	0.28%		+380%

Top 50 brands by share of voice • 1–25

#	BRAND	TYPE	VIDS	VIEWS	SHARE	PAID	VS Q4
26	Tatcha	BEAUTY	12	199k	0.25%	0%	+101%
29	Urban Decay	BEAUTY	35	198k	0.25%	0%	-55%
28	Victoria's Secret	BEAUTY	7	198k	0.25%	0%	+199%
29	Lancôme	BEAUTY	17	191k	0.24%	6%	-53%
30	Essence	BEAUTY	22	184k	0.23%	0%	+834%
31	Colourpop	BEAUTY	36	169k	0.21%	0%	-31%
32	Prada	BEAUTY	14	152k	0.19%	0%	-49%
33	Clinique	BEAUTY	11	146k	0.19%	9%	+130%
34	Tom Ford	BEAUTY	10	142k	0.18%	0%	+436%
35	Dove	BEAUTY	4	128k	0.16%	0%	+1647%
36	Laura Mercier	BEAUTY TOOLS	13	123k	0.16%	8%	-66%
37	Sigma Beauty	BEAUTY TOOLS	29	120k	0.15%	0%	-59%
38	Westman Atelier	BEAUTY	9	117k	0.15%	0%	NEW
39	L'Oréal	BEAUTY	20	112k	0.14%	5%	+25%
40	Nivea	BEAUTY	6	110k	0.14%	0%	+23%
41	Dyson	BEAUTY	3	103k	0.13%	0%	+77%
42	Estée Lauder	BEAUTY TOOLS	13	101k	0.13%	0%	FLAT
43	Rakuten	SHOPPING APP	17	100k	0.13%	6%	+412%
44	Tarte	BEAUTY	3	93k	0.12%	0%	NEW
45	IDYL	BEAUTY	3	92k	0.12%	0%	-5%
46	Glow Recipe	BEAUTY	5	87k	0.11%	0%	+535%
47	Dossier	BEAUTY	5	87k	0.11%	20%	+136%
48	Stylevana	BEAUTY RETAILER	12	84k	0.11%	0%	+8%
49	IT Cosmetics	BEAUTY	12	81k	0.10%	17%	+47%
50	MAC Cosmetics	BEAUTY	14	80k	0.10%	0%	+58%

FREQUENCY IS NOT REACH

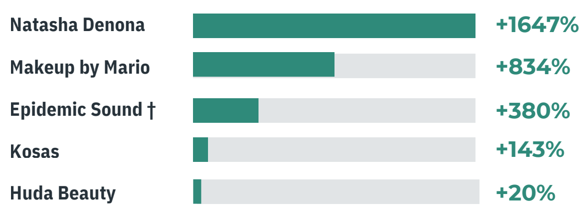
Maybelline leads on frequency with **83 appearances** but ranks only third by share of voice, because it earns roughly 12,300 views per appearance. **Sephora** earns about **52,000** and **Bobbi Brown** about **48,000**, the highest on the board. The gap between how often a brand appears and how much attention it earns separates brands winning on **ubiquity** from brands winning on the videos that actually get watched.

Prestige slipped. The retailer gained.

The index is built against Q4 2025 (2,208 qualifying videos), and the movement is where the story sits. The brands that led the format a quarter earlier all gave up share of voice at once, and much of that attention went to the store that sells them.

BIGGEST CLIMBERS · change in views, QoQ

BUDGET BRANDS SURGED ON EARNED PICKUP



PRESTIGE SLIPPED, THE RETAILER GAINED

Huda Beauty, the most-watched brand in Q4, fell to sixth as its views dropped **68%**. **Rare Beauty** fell 52% and **Fenty Beauty** 60%. Much of that attention went to **Sephora**, which more than tripled its views to take second overall. A retailer that carries everyone is becoming the name creators credit most on camera, **a shift that should concern any brand watching its share of voice migrate to the store that sells it**.

BUDGET BRANDS SURGED ON EARNED PICKUP

CoverGirl roughly tripled its presence, from 12 appearances to 39, and **Essence** climbed from 4 to 22, both almost entirely on unpaid creator choice. Two value brands moving hard in the same quarter suggests the format is no longer the preserve of prestige and indie labels.

THE MOVERS TO TRUST ARE THE HIGH-FREQUENCY ONES

Single-quarter swings are volatile for brands with only a handful of appearances, so the index flags low-volume spikes. The **structural** moves this quarter are the prestige decline, the Sephora surge, and the budget-brand climb.

THE LEADERBOARD

MAYBELLINE · FREQUENCY

Maybelline appeared in 83 GRWM videos last quarter, more than any other brand. Almost none were paid. This is what its share of voice is built on: creators folding the brand into everyday routines on their own.

"RESTOCKING MY ROUTINE | makeup + self care shopping (empties & GRWM haul!)"

adelala

219K views

THE SHOPPING APPS

LTK · SHARE OF VOICE KING

LTK's highest-reach GRWM appearance last quarter. Never spoken on camera. It earns its place entirely from the creator's shoppable links in the description.

"NEW SCHOOL MORNING ROUTINE ADJUSTING TO LIFE"

Not Enough Nelsons

1.70M views

MASS & DRUGSTORE: WINNING ON HABIT

CoverGirl · THE BUDGET SURGE

CoverGirl tripled its presence in GRWM this quarter, from 12 videos to 39, almost entirely on creators buying and trying drugstore makeup on their own. The budget surge is real and unbought.

"Trying My New Drugstore Makeup Purchases!"

Julia Adams MUA

28k views

PRESTIGE &FOUNDER-LED: DEFENDING A SLIPPING LEAD

Huda Beauty · PRESTIGE SLIPS

Established creators still feature Huda Beauty, but its share of voice fell from the top of the format to sixth in a single quarter. The pickup is thinning even where the affinity remains.

“come get surgery with me ... chit chat get ready with me life update”

Monet McMichael

119k views

RETAILERS: THE NEW DISCOVERY LAYER

SEPHORA · THE RETAILER GAINS

Sephora's surge to second is built on moments like this, where creators name the store as where they discover and buy, not a single product.

“GETTING MY LIFE TOGETHER! Deep cleaning, grwm for dinner, donating clothes”

AlondraDessy

128k views

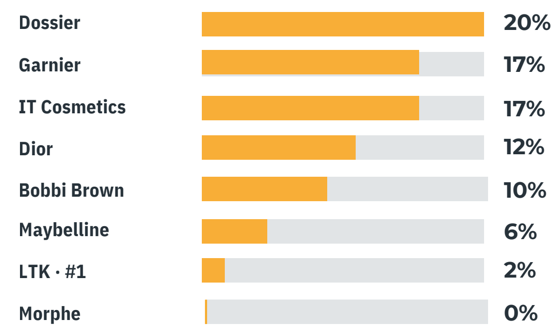
An almost uncontested format, and the opening it leaves

Only **4.9% of GRWM videos** carried a paid-promotion disclosure. Today's leaders earned their share of voice rather than buying it, but the more useful read of that number is **the opportunity it exposes**. The format is almost entirely uncontested by paid spend.

In most channels a brand fights for attention against heavy competing budgets. In GRWM, **more than 95% of the conversation has no brand dollars behind it at all**.

That makes the format unusually swayable for a brand willing to invest. Luxury already proves the lever works: the houses running deliberate paid programs, led by **Dior at a 12% disclosed-paid rate**, hold real share of voice while most of the field spends nothing.

DISCLOSED-PAID SHARE, SELECTED BRANDS



Luxury and fragmented fragrance names buy concentrated presence; the leaderboard leaders sit at or near zero disclosed paid. The white space between the two is the opportunity.

THE OPENING, IN ONE LINE

With roughly **1,500 qualifying videos a quarter** and almost no paid competition, a focused push on the right creators can move share of voice **at a fraction of what the same swing would cost in a saturated format**. The brands that recognize the opening first will shape the conversation before the rest of the category arrives.

4.9%
OF VIDEOS CARRY A PAID DISCLOSURE

95%+
OF THE CONVERSATION HAS NO BRAND DOLLARS BEHIND IT

The affiliate tools, and why their lead is a floor, not a ceiling

The platforms creators use to monetize their recommendations are tracked alongside product brands and labeled as such, because they behave differently: they earn share of voice from **links in the video description**, not mentions on camera. **LTK leads the entire index**, and climbed there while appearing in fewer videos than a quarter earlier (53 vs 63), as its views nearly tripled. It is landing in the highest-reach GRWM videos on the platform.

PLATFORM	VIDEOS	VIEWS	SHARE OF VOICE	PAID	VS Q4	TRAJECTORY
LTK	53	3.95M	5.03%	2%	+200%	Index leader; fewer videos, higher reach
Shop My	43	844k	1.07%	0%	+75%	Challenger; appearances tripled (13 → 43)
Rakuten	17	100k	0.13%	6%	+412%	Climbing quietly from a small base

FREQUENCY IS NOT REACH

GRWM is an affiliate-driven format. The individual product links a creator drops route through tracking links that the index **currently credits to the product brand**, not the platform carrying them, so a platform is counted mainly when a creator names it directly or links its storefront. The real reach of LTK, ShopMy, and the rest is higher than their standing here suggests. LTK's lead is a floor, not a ceiling. Resolving that attribution is a defined upgrade for the next edition.

A NOTE ON AMAZON

Amazon does not appear in the index, and that is a question of category, not a gap in the ranking. LTK, ShopMy, and Rakuten are **creator affiliate platforms**, tools built for creators to monetize what they recommend, and the voice they earn reflects creators choosing one tool over another. Amazon is a **general purpose commerce destination**, the default checkout link for nearly everything sold online; its storefront and amzn.to links sit across every niche, not beauty GRWM in particular. The data provider deliberately keeps the catch-all Amazon entity out of brand tracking, an everything-store link is closer to retail plumbing than to a brand competing for attention, and counting it would place Amazon at the top of nearly every report while saying little about the format. Isolating Amazon's true GRWM footprint is a refinement on the roadmap.

Mass wins on habit; prestige is defending a slipping lead

SEGMENT 01

WINNING ON HABIT

Mass & Drugstore

The mass segment owns frequency. **Maybelline** tops the entire format on appearances (83) and ranks third by share of voice; **CoverGirl** (39) and **Essence** (22) climbed hard, CoverGirl roughly tripling, Essence rising more than eightfold by views. Paid disclosure sits at or near zero across the segment.

Calibration: the trade-off is reach per appearance, the lowest of any segment, so share of voice comes from volume, not the biggest videos. GRWM is open to value brands; the play is product availability plus cultural relevance, not paid placement.

WATCH · THE BUDGET SURGE IS REAL

"Trying my new drugstore makeup purchases!"

JULIA ADAMS MUA · **28K VIEWS**

CoverGirl tripled its GRWM presence, from 12 videos to 39, almost entirely on creators buying and trying drugstore makeup on their own. **Unbought, and growing**.

SEGMENT 02

EARNED AFFINITY

Prestige & Founder-led

The celebrity and founder-led brands that defined the format a quarter ago all lost ground together. **Huda Beauty** fell from first to sixth (views −68%), **Rare Beauty** −52%, **Fenty Beauty** −60%, and Makeup by Mario and Kosas each about −31%. **Anastasia Beverly Hills** was the exception, climbing 149%.

Calibration: the signal to monitor is whether appearances and views fall together. Here, share of voice is a leading indicator of product affinity, not a lagging one, a brand can hold its ranking while its underlying pickup softens.

WATCH · AFFINITY REMAINS, PICKUP THINS

"Come get surgery with me ... chit chat get ready with me life update"

MONET MCMICHAEL · **119K VIEWS**

Established creators still feature Huda Beauty, but the brand's overall share of voice fell from the top of the format to sixth in a single quarter. **The pickup is thinning even where the affinity remains.**

Luxury builds its position; retailers are the new discovery layer

SEGMENT 03

WINNING ON SPEND

Mass & Drugstore

Luxury runs the most deliberate paid strategy in the format and gets the most uneven results. **Dior** holds strong share of voice (11th) on the highest disclosed-paid rate among the major names (12%); **Chanel** is essentially flat on steady volume, while YSL and Prada declined and **Tom Ford** surged more than fivefold from a small base.

Calibration: luxury can win share of voice in GRWM, but it is a constructed position built on the right creators and disclosed partnerships. The brands treating it as a deliberate program are separating from the ones expecting organic pickup.

SEGMENT 04

THE NEW LAYER

Retailers

Retailers are winning on a basis no single brand can copy. **Sephora** gained more share of voice than any other brand this quarter, more than tripling its views to reach second overall, by being credited on camera as a **discovery and trust source**, not a product. **Ulta Beauty** is emerging on the same logic, up nearly threefold.

Calibration: the retailer position is a curation play, and its rise should concern brands whose share of voice is being absorbed by the store that sells them. When creators credit where they shop rather than what they bought, the retailer captures the attention.

SEGMENT 05

EARNED, FRAGILE

Reach-efficient Indies

A cluster of smaller brands earns outsized share of voice from very few appearances on large creators. **Bobbi Brown** reached seventh overall on just 10 videos (~48,000 views per appearance). **Summer Fridays** and **Westman Atelier** entered as new names; **Melt Cosmetics** and **Glow Recipe** posted some of the largest gains.

Calibration: the most efficient position in the format, but also the most fragile, it rests on a handful of creator relationships. Track which creators carry you, not just how many.

WATCH · A PRODUCT BRAND CAN'T OCCUPY THIS

"Getting my life together! Deep cleaning, grwm for dinner, donating clothes"

ALONDRADESSY · **128K VIEWS**

Sephora's surge to second is built on moments like this, where creators name the **store** as where they discover and buy, not a single product. That is share of voice a product brand cannot occupy.

Luxury builds its position; retailers are the new discovery layer

SEGMENT 06

WINNING ON SPEND

Beauty Tools

Tool brands hold real share of voice on frequency. **BK Beauty** (26 appearances) and **rephr** (25) both rank inside the top 20, and **Dyson** appears on hair-styling strength. Application tools are a natural fit for a format built on the act of getting ready.

Calibration: the segment is worth watching as an entry point for brands adjacent to color cosmetics.

26	25	+77%
BK BEAUTY APPREANCES	REPHR APPREANCES	DYSON VIEWS QOQ

SEGMENT 07

THE WIDENING EDGE

Retailers

A small number of non-beauty brands reached high share of voice on the strength of single viral videos, most surfacing inside family and "get ready with us" routine content rather than makeup tutorials. A **bedding brand and a luxury fashion label** both cleared the top tier this way.

Calibration: these are held out of the headline ranking as single-video spikes, but the pattern is worth tracking: the format is widening from the makeup mirror into broader lifestyle content. The brands that notice the crossover first will reach those audiences before the price rises.

THE THROUGH-LINE

Across every segment, the brands winning share of voice are the ones **creators reach for on their own.** Spend buys a supporting role; habit, affinity, curation, and infrastructure win the format.

The questions the next index will answer

The opening quarter sets up the questions Q2 will answer. Tracked quarter over quarter, these movements are the point of the index.

01 Whether the **prestige brands that slipped** can reclaim their share of voice.

02 Whether **Sephora's surge** as a credited retailer holds.

03 Which **shopping app** creators default to as the affiliate layer consolidates.

04 Whether the **lifestyle crossover** beyond beauty accelerates.

Net Influencer × ThoughtLeaders. The GRWM Index is the first edition of a quarterly benchmark on share of voice in social content. Figures reflect a single extraction run, May 2026

Methodology

Built in partnership with **ThoughtLeaders** across **1,658** qualifying long-form YouTube "Get Ready With Me" videos published in Q1 2026 and **2,208** in Q4 2025. Videos qualify when the title or hashtags identify them as GRWM and the content is long-form. Share of voice is measured by the actual views a brand's appearances earned, counted once per video. Paid presence is based on creator-disclosed promotion. Shopping apps are tracked alongside product brands and labeled as such. Non-endemic names that spike on a single viral video are flagged in QA and held out of the headline ranking while remaining in the full dataset.

A Note on Commerce Signals

GRWM is affiliate-driven: most videos route viewers to commerce through the creator's own shoppable links. The index treats a link's presence as commerce enablement, kept separate from paid sponsorship, a creator earning commission on a product she chose is not a brand that paid for placement. Two known limits sit on this edition and frame next quarter's deeper dive:

- **Platform figures are a floor.** Product-level shoppable links route through tracking domains currently attributed to the product brand, not the platform carrying them.
- **General-commerce destinations** whose links appear across the whole web, Amazon foremost, are not captured by the named-brand method.

The next edition will map tracking domains back to the platforms that own them and add description-level link attribution.

The unfiltered leaderboard

These tables present the unfiltered leaderboard, including the non-endemic names the body holds out of the headline ranking. Overall covers all brand appearances; paid covers only the 82 long-form GRWM videos in Q1 that carried a creator-disclosed paid promotion. Utility and social-platform references are excluded as non brands.

A1. Top 10 by reach, overall

Ranked by total views a brand's appearances earned, counted once per video.

#	BRAND	TYPE	VIEWS
1	LTK (rewardStyle)	AFFILIATE PLATFORM	3.9M
2	Sephora	BEAUTY	2.13M
3	Beddy's	APPAREL / RETAIL / OTHER	2.03M
4	Burberry	APPAREL / RETAIL / OTHER	1.71M
5	Artlist	MUSIC / TOOLS	1.23M
6	Maybelline	BEAUTY	1.02M
7	ShopMy	AFFILIATE PLATFORM	844k
8	Rare Beauty	BEAUTY	655k
9	Trader Joe's	APPAREL / RETAIL / OTHER	602k
10	Huda Beauty	BEAUTY	558k

A2. Top 10 by frequency, overall

Ranked by number of qualifying GRWM videos the brand appeared in.

#	BRAND	TYPE	VIDEOS
1	Maybelline	BEAUTY	83
2	LTK (rewardStyle)	AFFILIATE PLATFORM	53
3	ShopMy	AFFILIATE PLATFORM	43
4	Sephora	BEAUTY	41
5	Rare Beauty	BEAUTY	41
6	Huda Beauty	BEAUTY	39
7	CoverGirl	BEAUTY	39
8	Too Faced Cosmetics	BEAUTY	37
9	Colourpop	BEAUTY	36
10	Chanel	BEAUTY	35

A3. Top 10 by reach, paid replacements

Among the 82 creator-disclosed paid videos, ranked by views. The paid layer is thin, so single videos move this ranking.

#	BRAND	TYPE	PAID VIEWS	VIDS
1	Maybelline	BEAUTY	135K	5
2	DJI	TECH / OTHER	99K	2
3	Dior	BEAUTY	93K	3
4	IT Cosmetics	BEAUTY	62K	2
5	Midi Health	OTHER	61K	1
6	rephr	BEAUTY TOOLS	61K	1
7	CoverGirl	BEAUTY	61K	1
8	Laura Mercier	BEAUTY	61K	1
9	Quince	APPAREL / RETAIL / OTHER	48K	4
10	ButcherBox	OTHER	47K	1

A3. Top 10 by frequency, paid placements

Among the 82 paid videos, ranked by number of paid videos. Ties broken by paid views.

#	BRAND	TYPE	PAID VIEWS	VIDS
1	Maybelline	BEAUTY	135k	5
2	Quince	APPAREL / RETAIL / OTHER	48k	4
3	Dior	BEAUTY	93K	3
4	Epidemic Sound	MUSIC / TOOLS	27k	3
5	Rare Beauty	BEAUTY	16k	3
6	DJI	TECH / TOOLS	99k	2
7	IT Cosmetics	BEAUTY	62k	2
8	Chanel	BEAUTY	32k	2
9	Rose Forever	OTHER	24k	2
10	Lickd	MUSIC / TOOLS	4k	2

Non-endemic names shown in teal are excluded from the headline ranking as single-video or cross-niche spikes. "Other" denotes categories outside the index's beauty taxonomy.

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