

Gen Alpha Beauty Survey

razorfish | **GWI**

Key questions

01 What are their purchase influences?

02 How do Gen Alphas feel about aging?

03 Do they know about the ingredients they use?

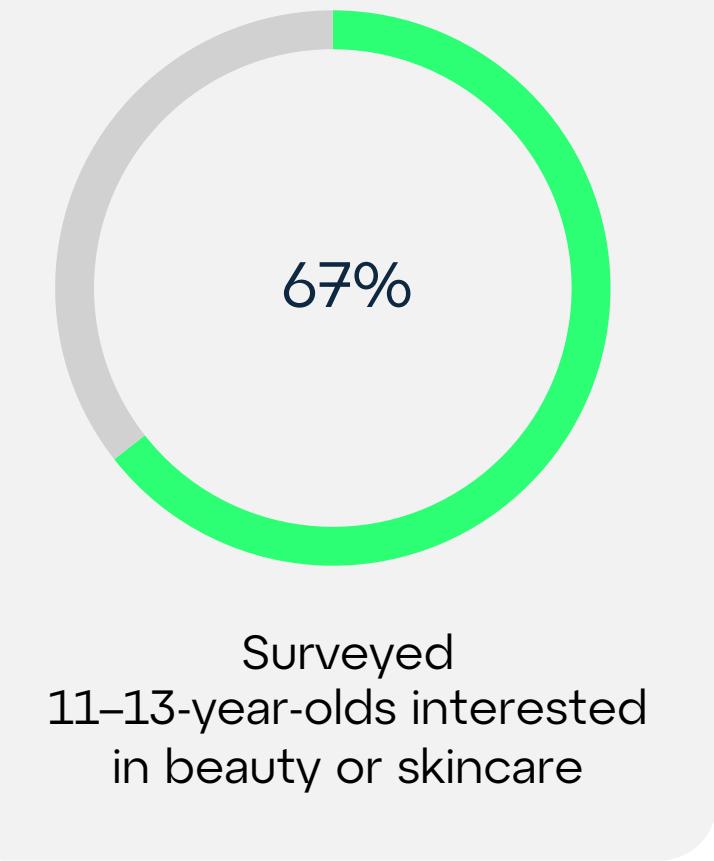
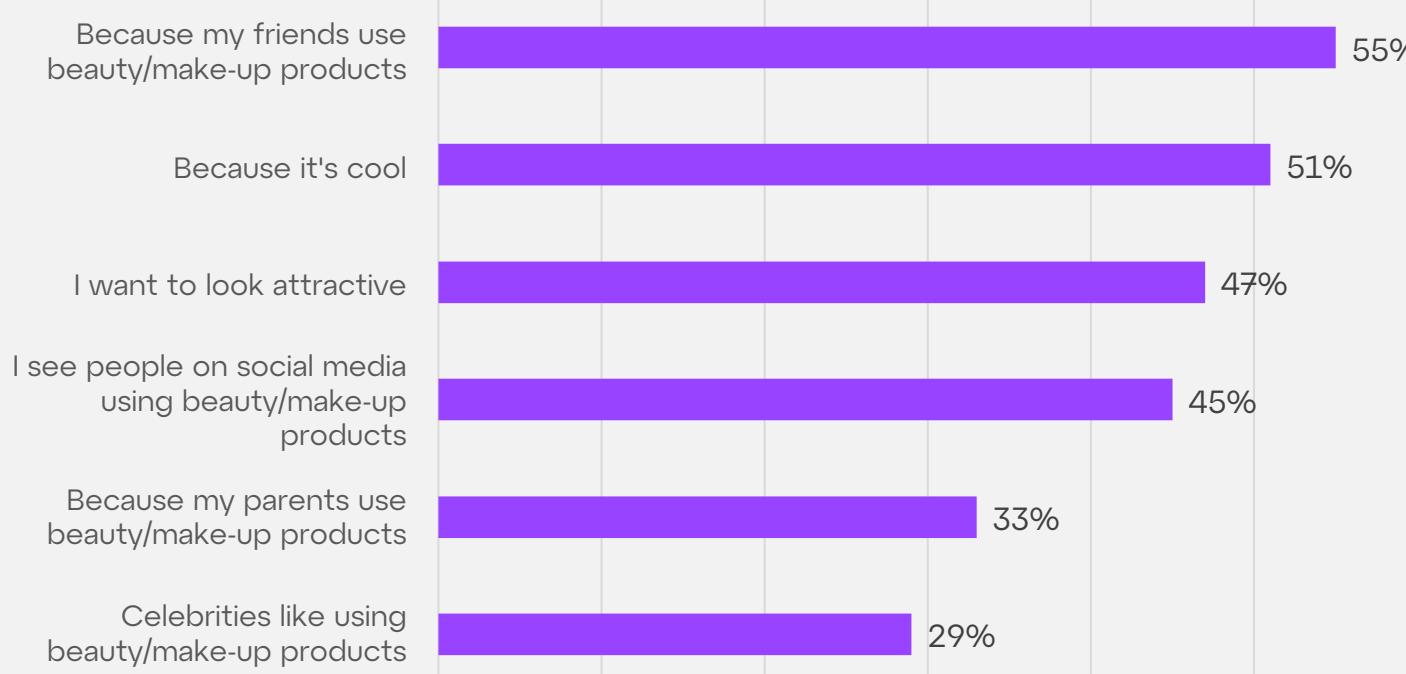
04 How much autonomy do they have?

Overview



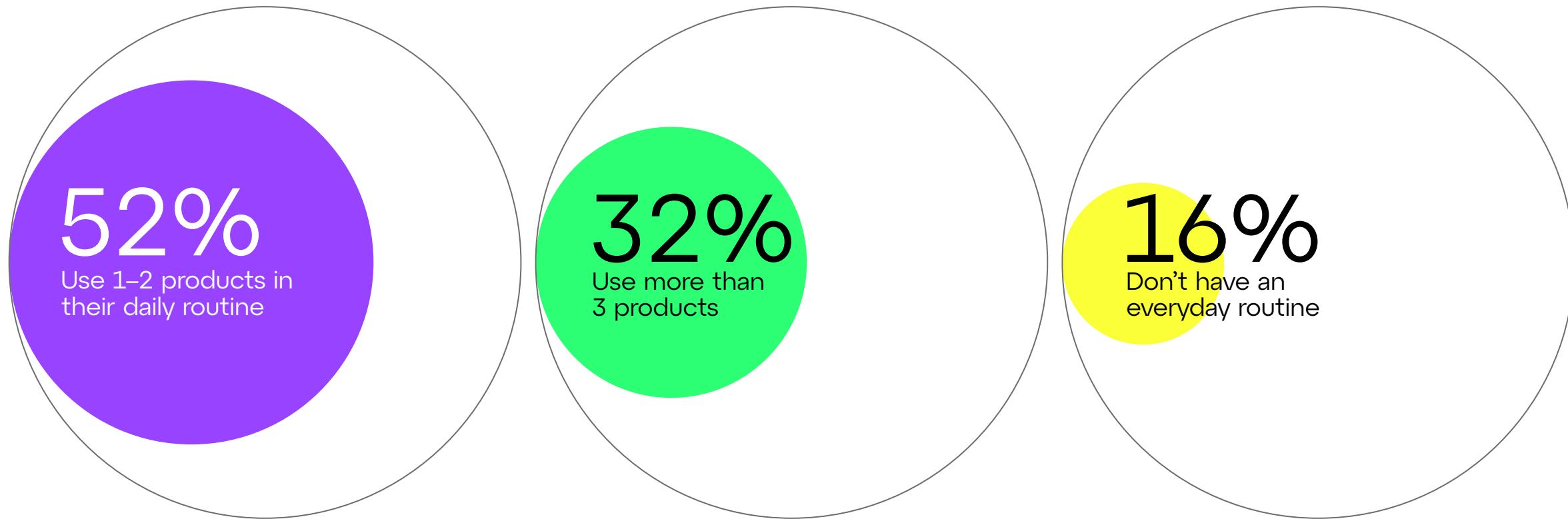
Beauty interest is driven mostly by social and aspirational factors

Reasons for interest in beauty/make-up



Source: Razorfish Gen Alpha Beauty Survey. **Base:** Age 11-13 (n=606). **Question:** Why are you interested in beauty/make-up? Please select any reason that may apply. (q6a)

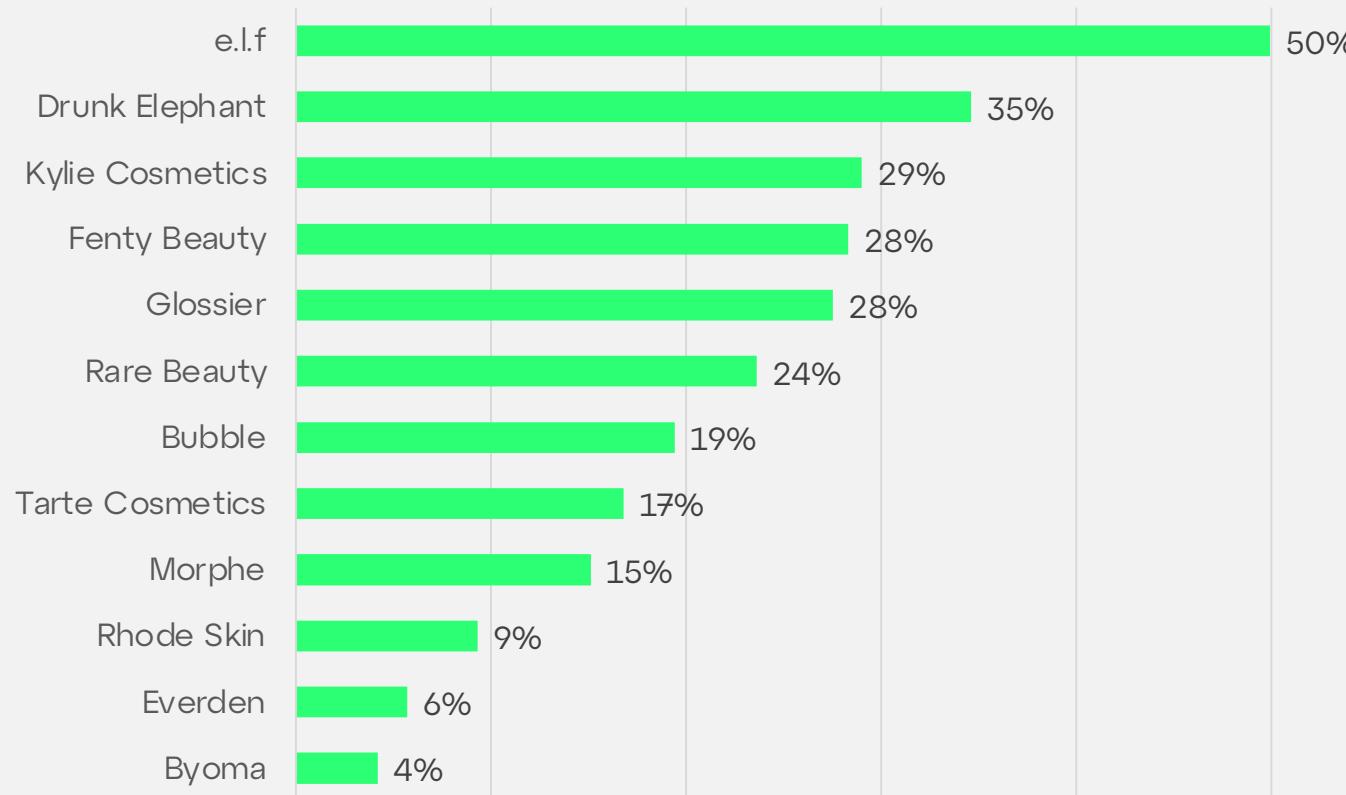
Gen Alpha isn't just dabbling—they're already sophisticated skincare users



Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** How many beauty/skincare products do you use in your everyday routine? (q9a)

Masstige Gen Z brands are the most preferred by Gen Alpha

Beauty brands liked by Gen Alpha



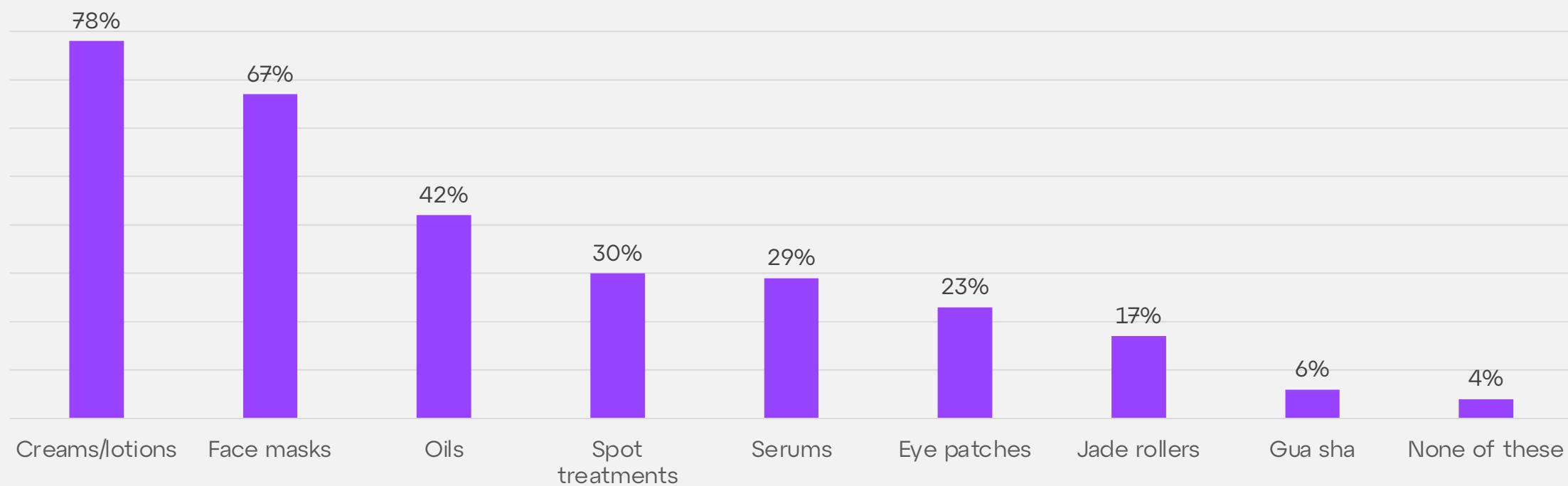
These preferences are even more pronounced for Gen Alphas who pick out their own beauty products or use more than three products in their skincare routines.

BIPOC Gen Alphas are **39% more likely** to like Fenty Beauty (39%)

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these beauty/skincare brands do you like? (q14)

They have already tried a wide variety of product types

Gen Alpha beauty product usage



Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Have you ever used any of these products? (q7a)

Gen Alpha is privy to everyone's routines



North West Shows Us Her Skin Care Routine in Latest GRWM on TikTok

Northie is THE influencer.

Celebrity children are popularising multi-step skincare routines, but is it safe?

The Kardashian kids are breaking new ground... again

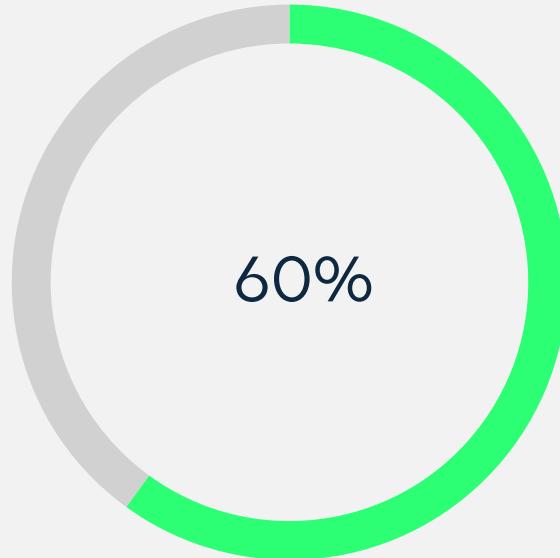
Through Get Ready With Me videos, especially those of the rich and famous, Gen Alpha learns that to look cool IRL, you first have to prove you belong in the conversation.

Prior to GRWM, there was pressure to have the latest “it” brands in fashion—bags and shoes that you could flex only in person or in a curated Instagram post. But the revealing nature of GRWM defines “coolness” as having the right products before you even get to school.

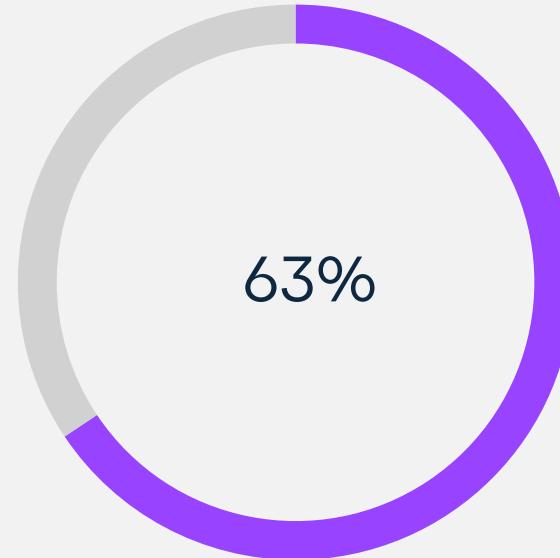
Beauty Motivators



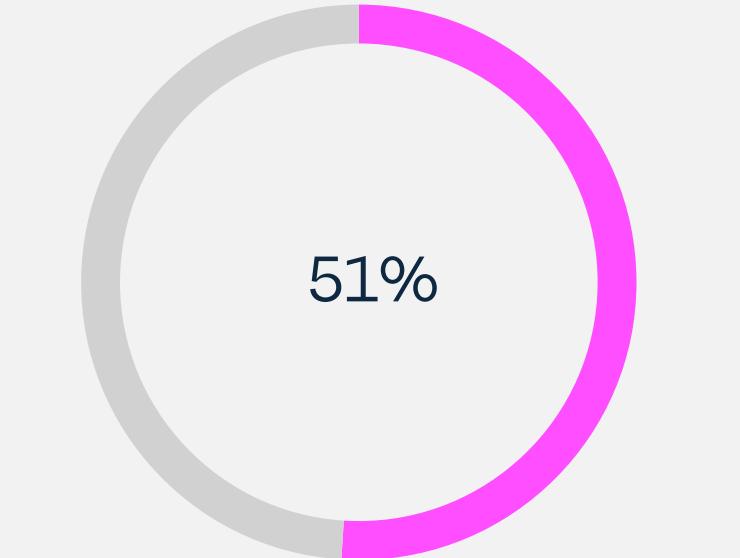
Beauty is the new social currency



Say what other people their age think of them is important



Agree their friends compare and trade beauty products



Are interested in beauty because it is cool to be interested in beauty/makeup

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these do you agree with? (q11); Which of these are important to you? (q7); Why are you interested in beauty/makeup? (q6a)

Skincare is Gen Alpha's collector's item



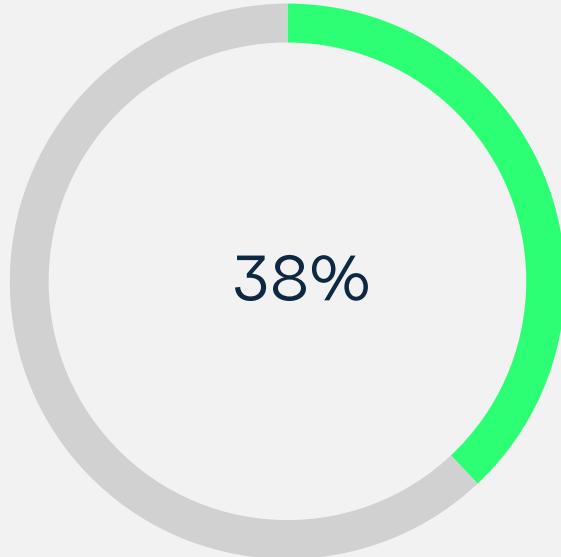
“If it’s not trendy,
I won’t buy it.”

-11-year-old girl

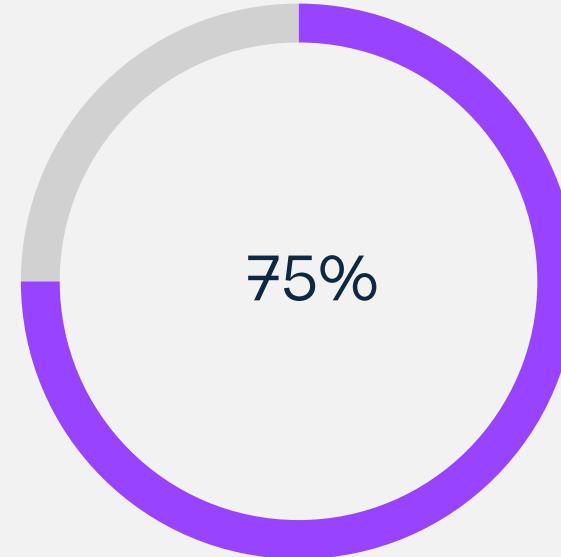
For older generations, there were baseball cards, then Pokemon cards, then silly bandz— all things that kids could collect, ultimately for the sake of show-and-tell.

Now, Gen Alpha's favorite brands (typically the ones with bright and colorful packaging) have fallen under **#preppyskincare** (136m views) as the products to own.

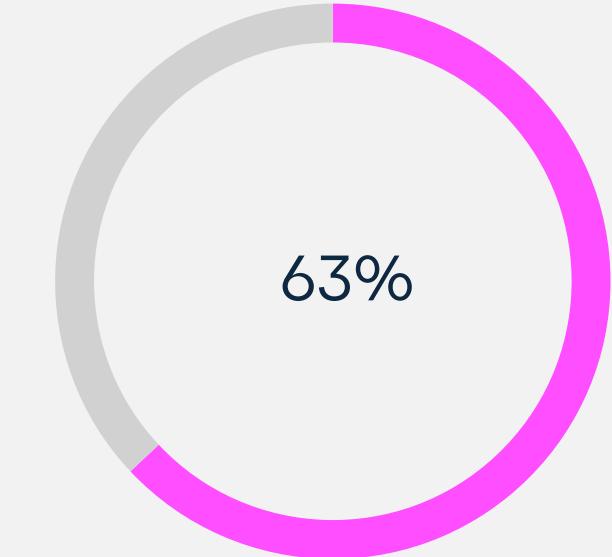
Beauty is a form of recreation and entertainment



Have made their own beauty content (like Get Ready With Me videos)



Are interested in watching beauty/skincare content on social media



Are interested in going to a birthday party or event at a beauty store like Sephora

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these do you agree with? (q11); Which of these things are interested in? (q13)

Beauty stores are more than a product playground—they have become a third space



Tweens are eager to celebrate their birthdays either at a Sephora or with a Sephora theme at home.

Sephora has superseded itself as a store. As a space and facilitator of make-believe, beauty stores let tweens experience glamorous "main character" energy, possibly for the first time ever.

A Sephora employee comments on the Sephora kids phenomenon:



BeebinBorah • 9mo ago •

I do probably about 1-4 birthday parties every month at my location. Small ones are done during non-peak times and anything more than 20 guests is done an hour after closing. Biggest party we've had was 60 little 10 year olds. Some kids are great and some are not as great lol but the service \$\$ is great

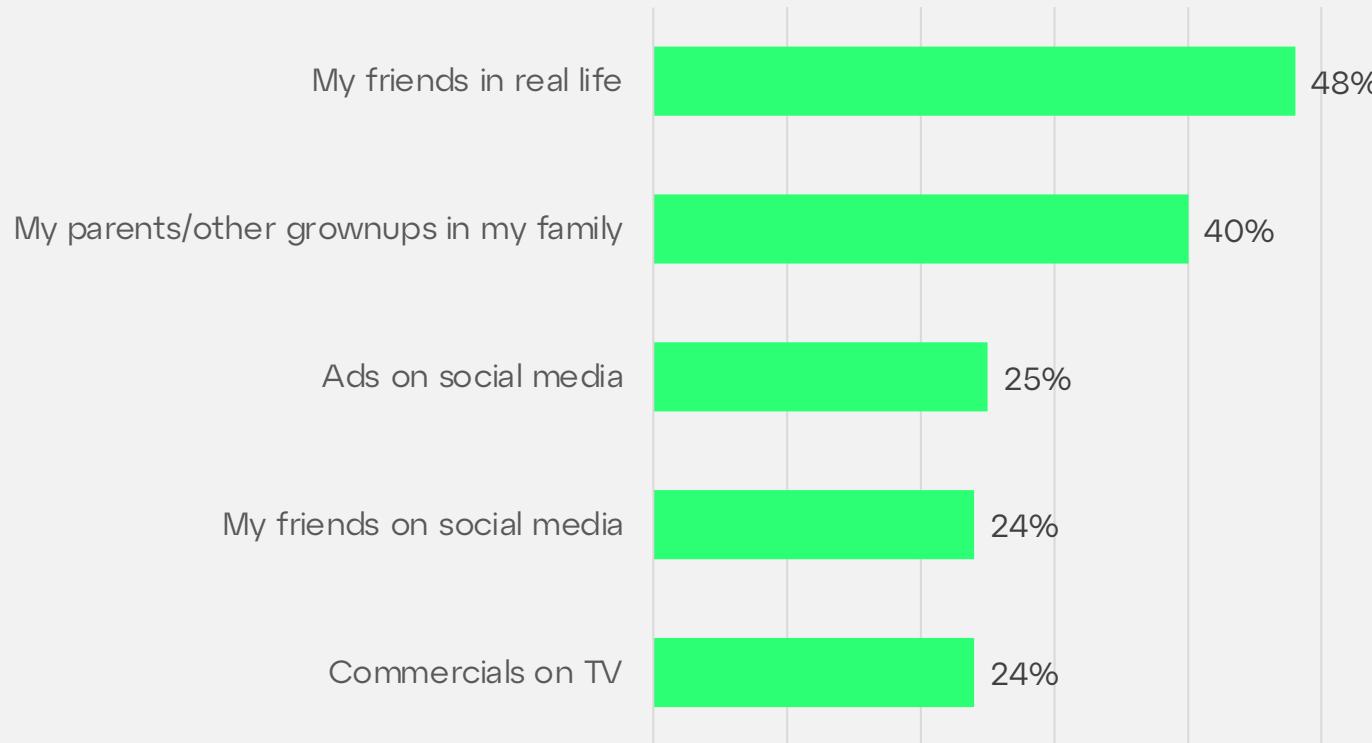
0 4 + Reply Award Share ...

Circles of influence



Friends and family play an outside role in identifying skincare and beauty trends

Top ways to find out about latest beauty/skincare trends



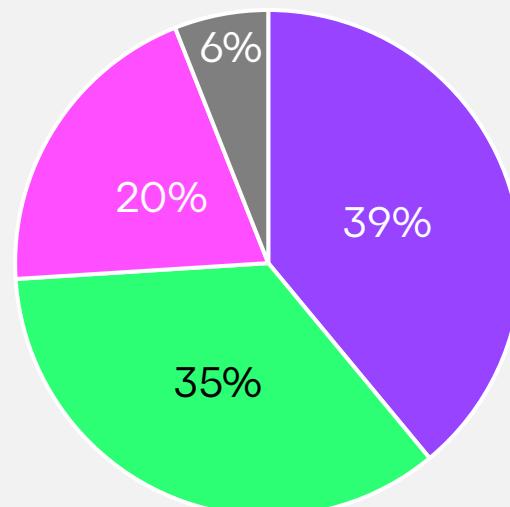
Gen Alphas who **pick out their own beauty products** are **32% more likely** to find out about new trends via social media ads

BIPOC Gen Alphas are **16% more likely** to find out about new trends via younger influencers (26%), and are **21% less likely** to find out about trends from social media ads (20%)

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** What are your top three favorite ways to find out about the latest beauty/skincare trends? {Pick up to 3} (q10)

Parents play a significant role in purchase decisions, but Gen Alphas desire autonomy and respect

Beauty/skincare product purchase decision-making



■ We decide together
■ I pick this out myself

■ My parents decide for me
■ I don't use this

88%

Say it is important to make decisions on their own without their parents

87%

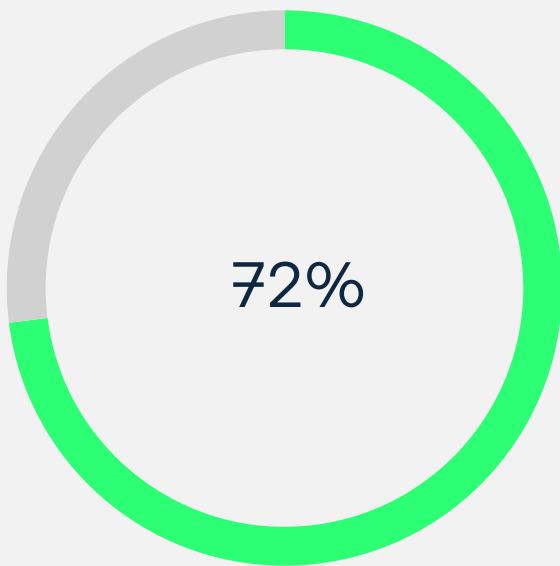
Say it is important to share their views/opinions

63%

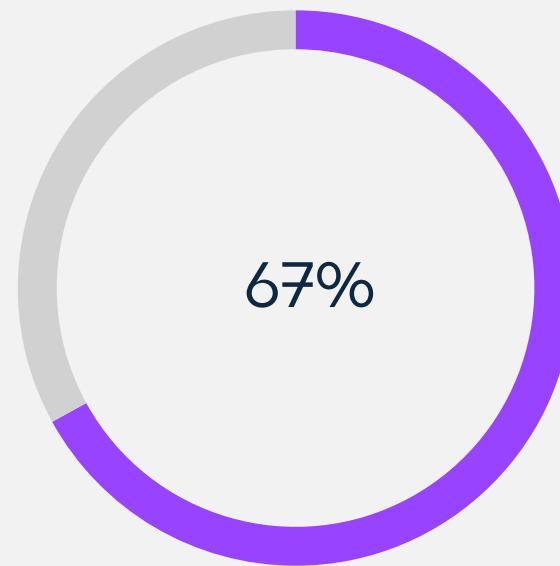
Say it is important to be treated like a grown-up

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** How much say do you have when you or your parents are buying the following? (q5); Which of these things are important to you? (q7)

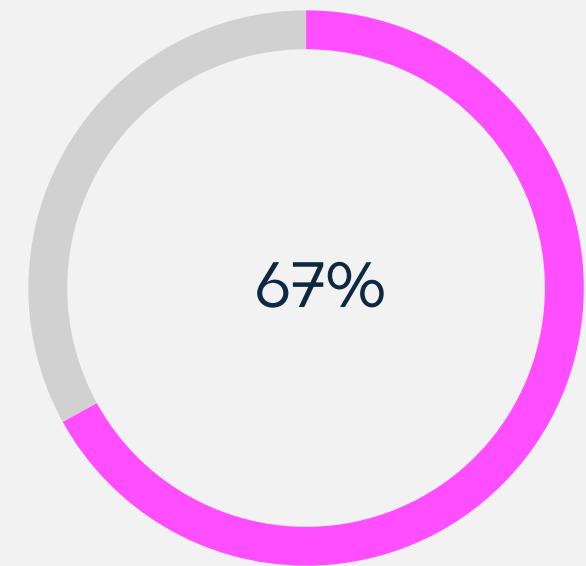
Despite real-life relationships, influencers play a major role for Gen Alphas



Are interested in how their favorite influencers/celebrities take care of their skin



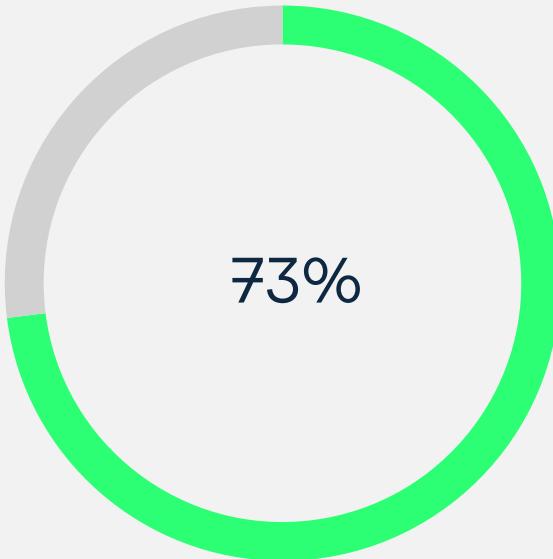
Follow beauty influencers who are older than them



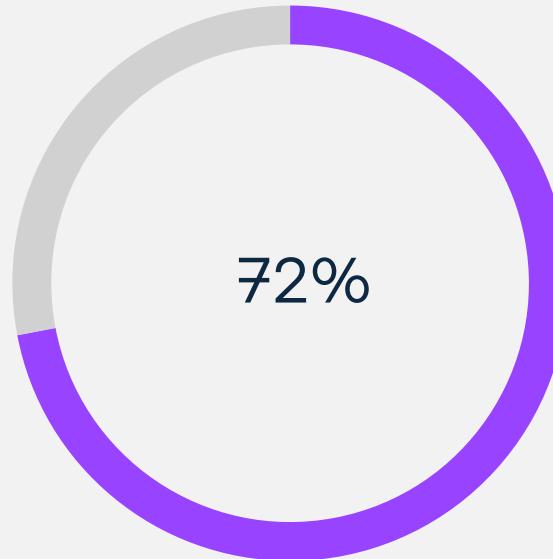
Follow beauty influencers who are younger than them

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these things are you interested in? (q13); Which of these do you agree with? (q11)

Gen Alphas also want to expand their influence within their circles



Are interested in teaching a parent their skincare routine



Are interested in teaching friends their skincare routines

86%
of Gen Alphas who **use more than three products** are interested in teaching a parent their skincare routine

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these things are you interested in? (q13)

To participate in skincare is to participate in the culture of influencing—on and off camera



"I'm 11, and I think I know more about Drunk Elephant than you do."

"I hadn't heard of Drunk Elephant until my daughter included it on her Hanukkah wish list. She's 8. Joke's on me."

-Mom of a Gen Alpha daughter

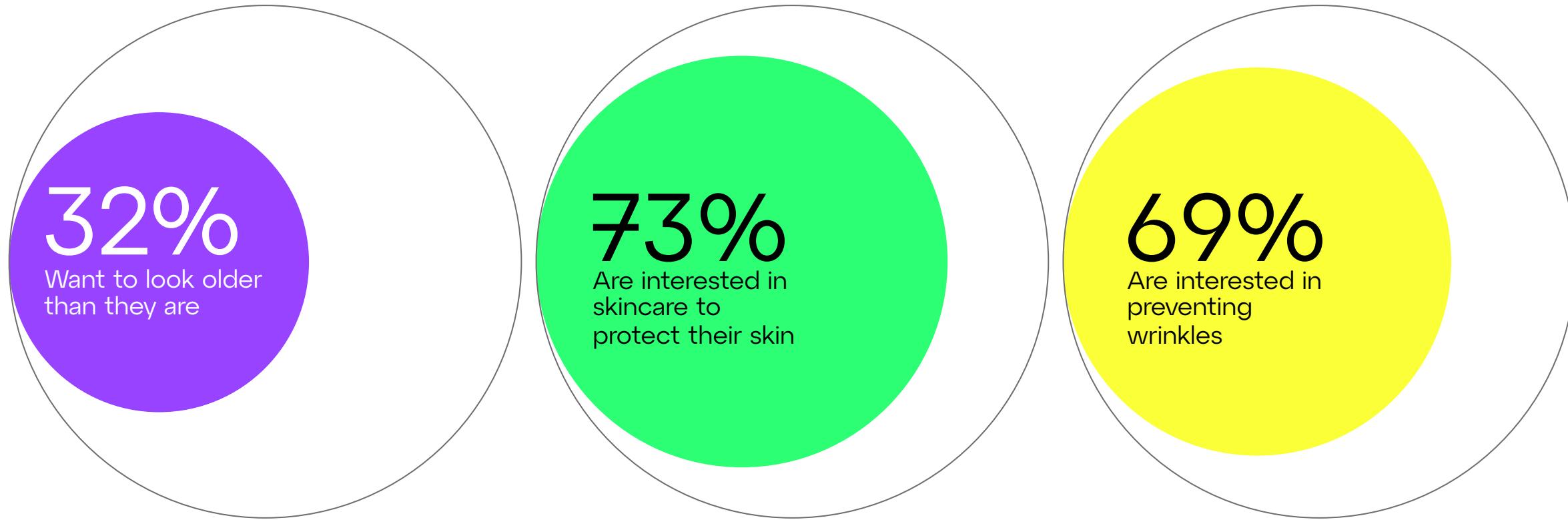
The beauty space allows kids and tweens to play “influencer” to those around them. These products can double as props while mimicking the online mannerisms and language of their favorite influencers.

Take, for example, Koti and Haven Garza, 7-year-old twins with 4.8 million followers on TikTok. Despite struggling to pronounce adult words like “contour,” Haven uses trendy words like “demure” for the camera.

Relationship with aging



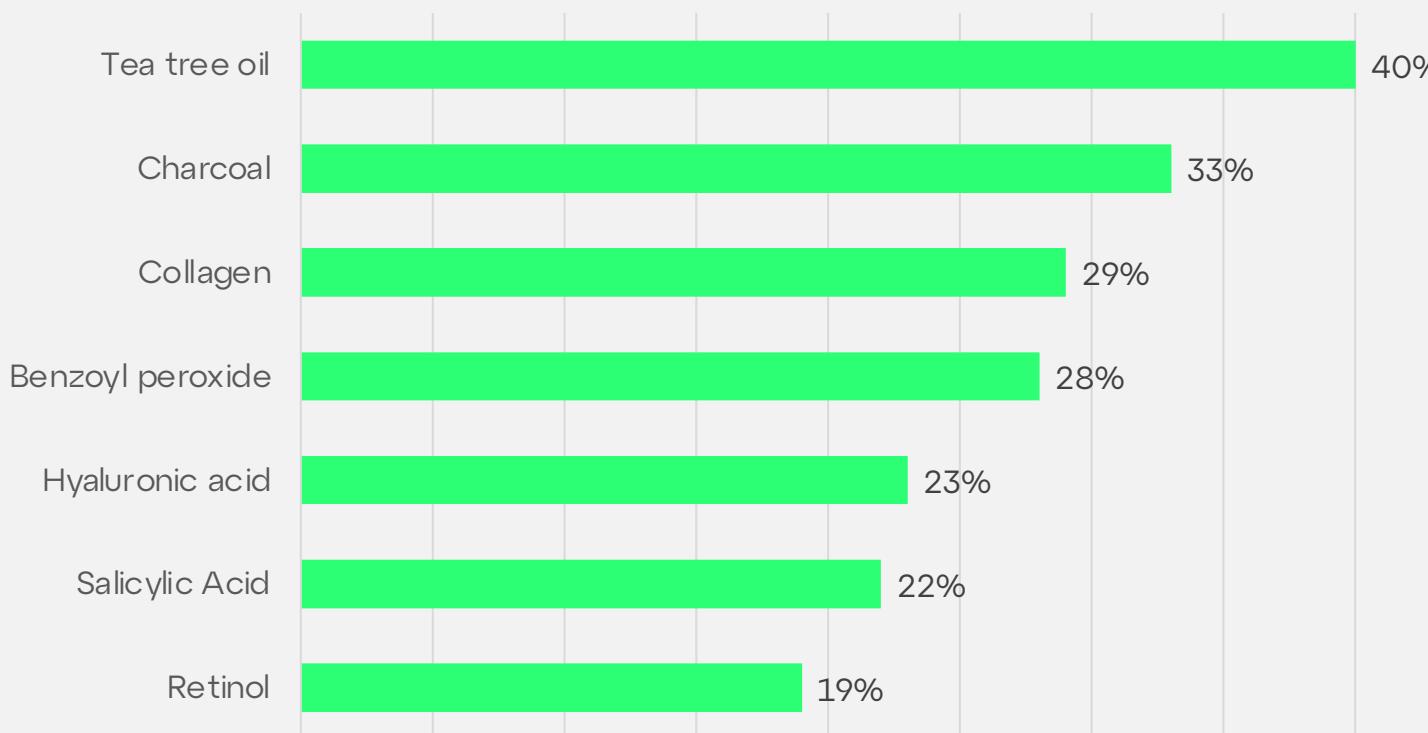
A third of Gen Alphas want to look older, yet they are worried about the consequences of aging



Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Why are you interested in skincare? (q6b); Which of these things are you interested in? (q12); Which of these things are important to you? (q7)

Nearly a fifth are using an anti-aging skincare ingredient that is not suitable for young skin

Ingredients in skincare products used



Gen Alphas who use more than three products are **56% more likely** to use an acne product with **benzoyl peroxide**

Gen Alphas who pick out their own beauty products are **53% less likely** to use a beauty product with **retinol**

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Use beauty/skincare products (n=431). **Question:** Do any of those products have any of these ingredients? (q8)

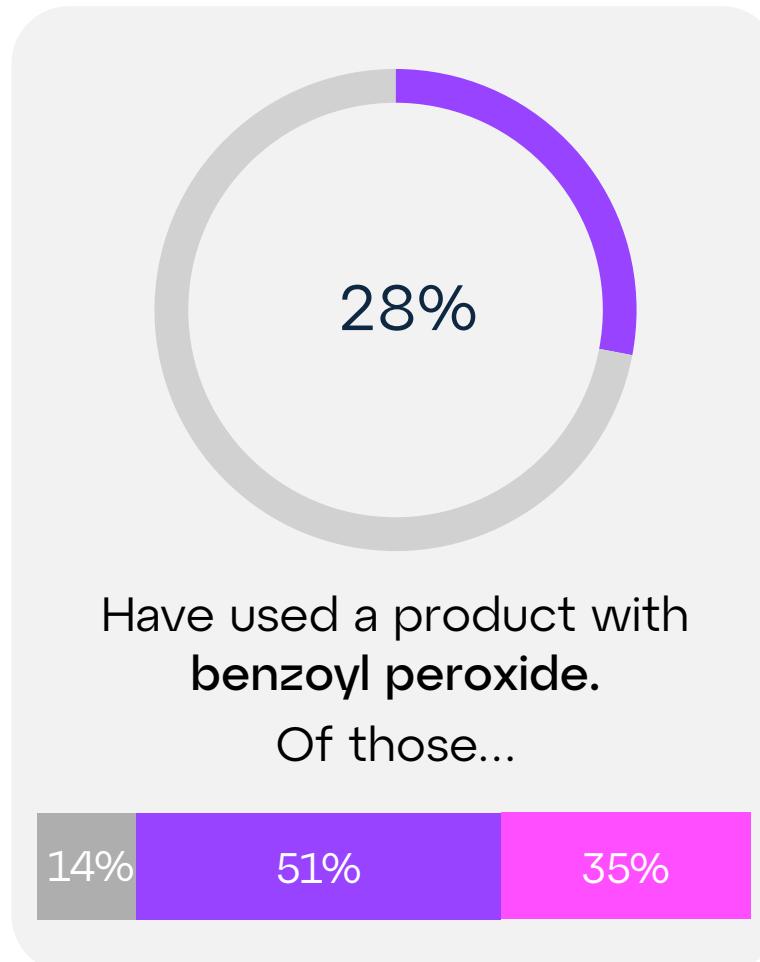
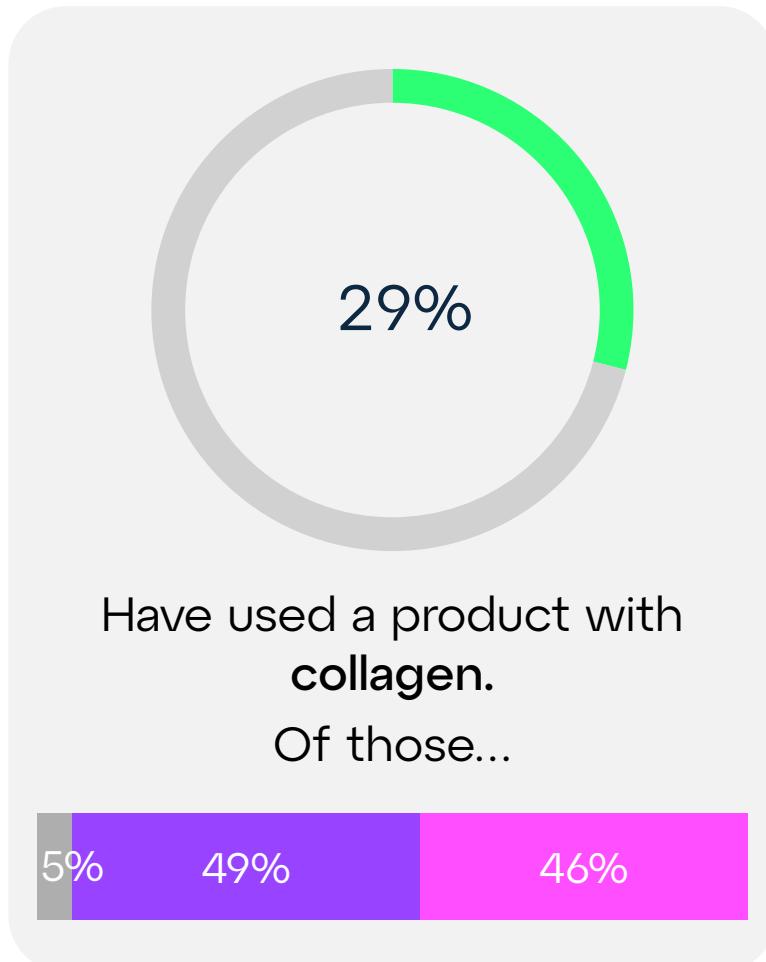
The dissolution of age-appropriate tween subculture has pressured Gen Alpha to look, feel, and act older



Gen Alpha girls want to grow up. Meanwhile, their Millennial mothers want to stay young.

The mother-daughter relationship between these two generations is proving to be a force within the beauty industry. They enable each other, shopping together over a shared interest, ultimately merging their beauty goals.

There is a gap between ingredient usage and knowledge



■ Know almost nothing ■ Know a little ■ Know a lot

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Use collagen (n=126); Use benzoyl peroxide (n=120); Use retinol (n=83). **Question:** How much do you know about how these skincare ingredients work? (q9)

Amidst the skincare craze, Gen Alphas are unknowingly putting themselves in harm's way

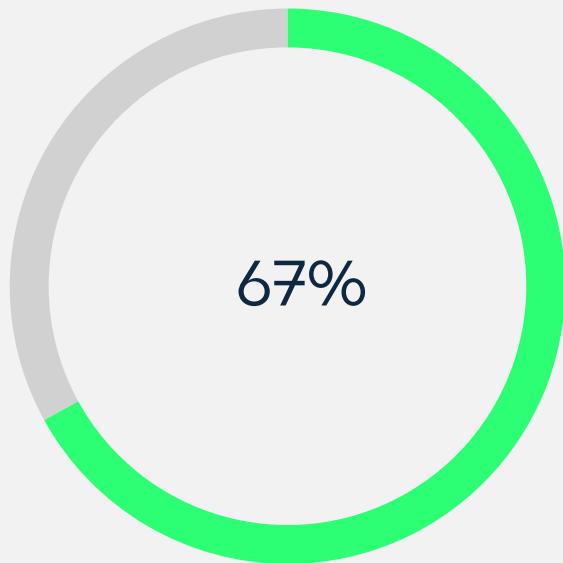


Sephora kids are mobbing retinol, anti-aging products. Dermatologists say it's a problem

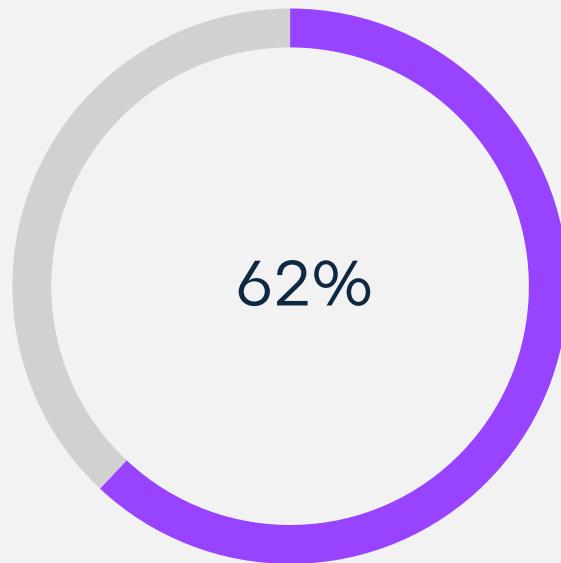


Despite knowing all the trends, Gen Alpha isn't getting the education they need from brands.

Despite an anti-aging focus, the ethos of “real beauty” is not dead



Say it is important to see media with different body types



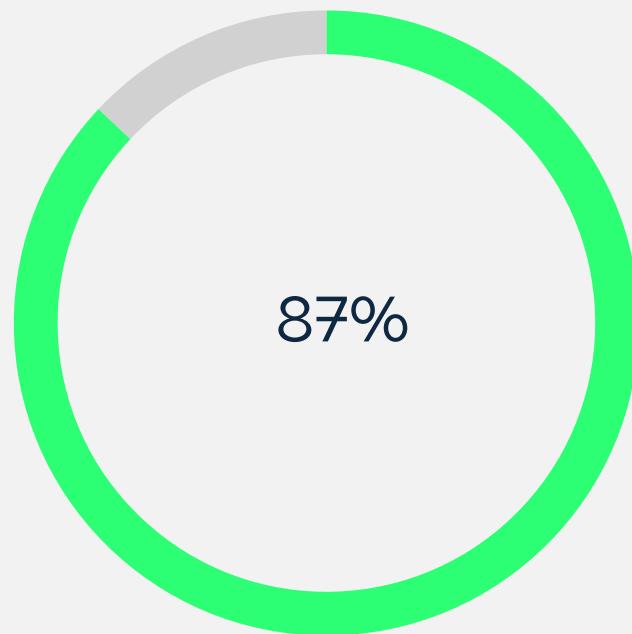
Say it is important to see ads with different body types

BIPOC Gen Alphas are **13% more likely** to say it is important to see media with different body types (75%)

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these things are important to you? (q12)

Most want to show their best possible selves to the world—and for a sizeable percentage of Gen Alphas, that's online

Say it is important to show their best possible self to the world



93%

Agree that looking good helps them feel good about themselves

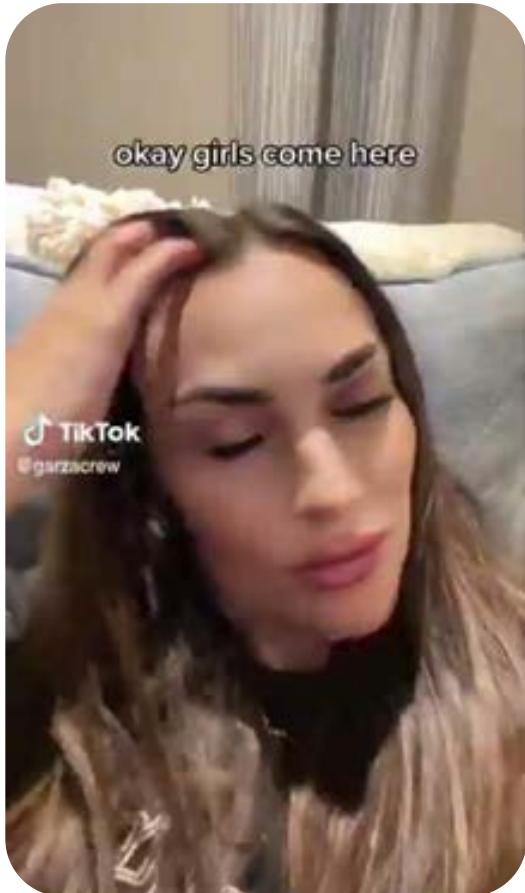
36%

Say it is more important to look good online than in real life

Gen Alphas who use more than three products are **64% more likely** to say it is more important to look good online than in real life (59%)

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these things are important to you? (q12); Why are you interested in beauty/make-up?; Which of these do you agree with?

Social media is seen as a tool for creativity, but it exposes Gen Alpha to dangerous ideals



80%

of tween girls said they had used a filter or a retouching app to change their appearance by age 13.

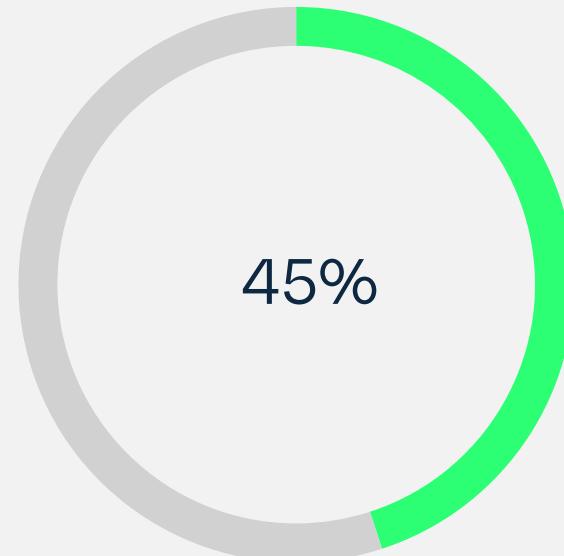
Parents report that 60% of Gen Alpha use social media for creative expression. Gen Alpha are using filters for fun, distancing their digital presentation from their real selves.

Gen Alpha's parents are 2.8x more likely than parents of Gen Z or older to post on social media using a filter. Thus, Gen Alpha is growing up with an instinct to use a filter as a form of expression.

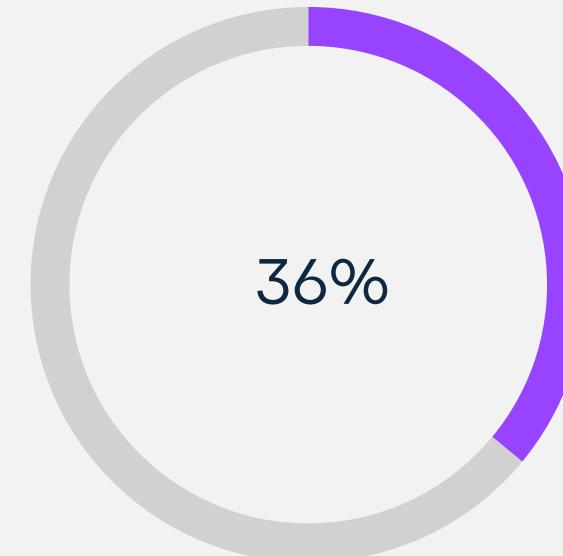
Gen Alpha Boys



Gen Alpha boys are just as interested in skincare—the "cool factor" is driving behavior



are interested in skincare



think it's cool to be interested in skincare

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these things are you interested in? (q13); Which of these do you agree with? (q11)

TikTok breaks the taboo around beauty and skincare for boys



“I learned on TikTok it’s important to wash your face, especially if you’re an athlete.”

-14-year-old Gen Alpha boy



Historically, beauty messaging excluded boys, and in-store aisles reinforced that they weren't the target audience.

That is, until TikTok. Gen Alpha boys can easily discover new brands, products, and routines by way of trending hashtags like #mensmakeup (327M views), #mensskincare (293M) and #mensskincareproducts (32M).

Fueling an interest in skincare and beauty within a passion for gaming



Sol de Janeiro tackles gaming with new Roblox activation

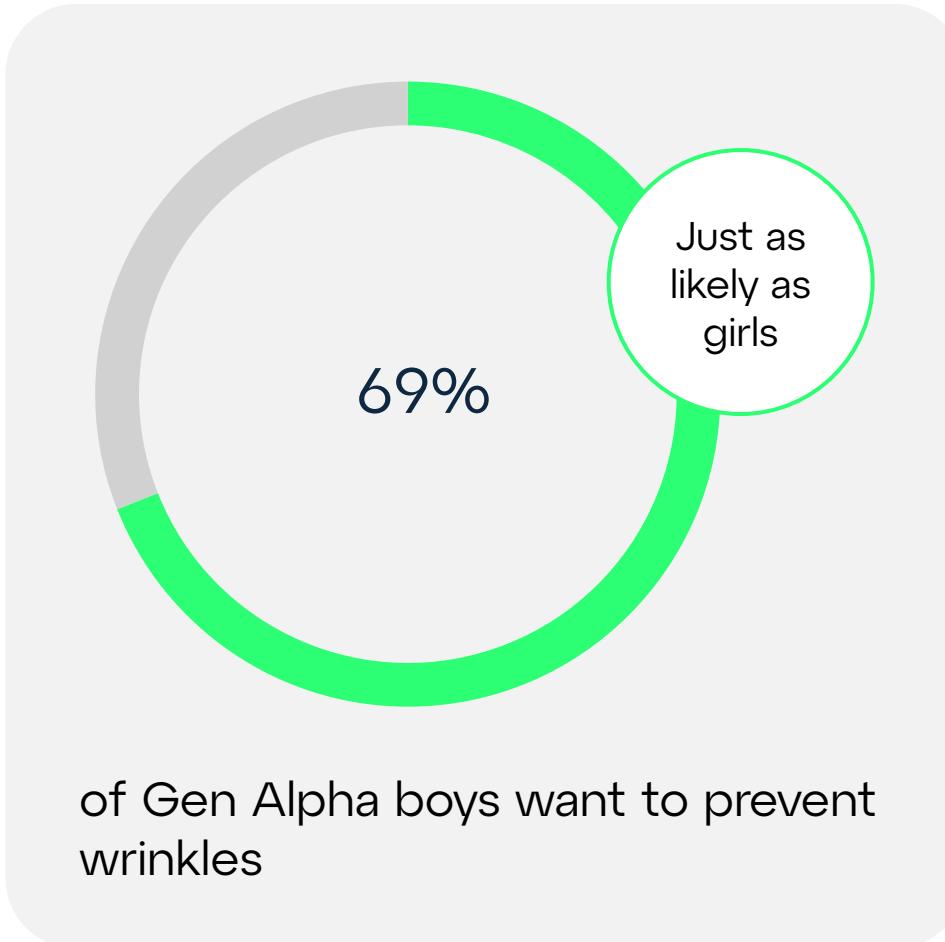
E.l.f. Debuts Roblox Game

Beauty's Buzziest Roblox Games, Reviewed by Kids

On a gaming platform like Roblox, for example, 42% of users are under 13 years old. Although Roblox's gender distribution is more evenly split, users are still 1.3x more likely to be male.

Since 2023, beauty brands like e.l.f. Beauty, Fenty Beauty, and Sol de Janeiro have entered the space. Roblox and similar platforms are giving brands the opportunity to provide experiences for Gen Alpha boys to explore the possibilities of beauty.

Gen Alpha boys have thorough skincare routines and also hope for preventative results



1 in 4

Gen Alpha boys use 3-5 products in their skincare routines

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these things are you interested in? (q13); Which of these do you agree with? (q11)

Gen Alpha boys want to maximize their looks



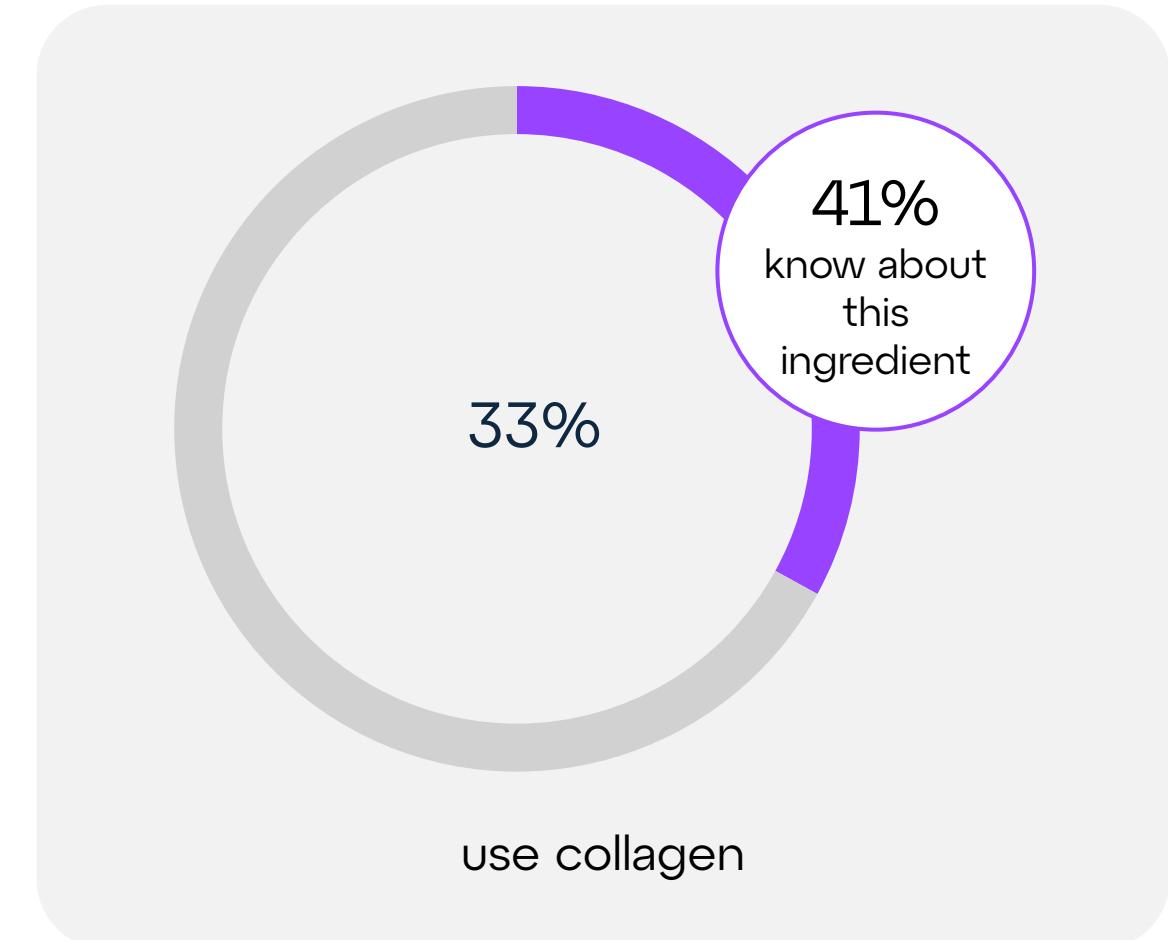
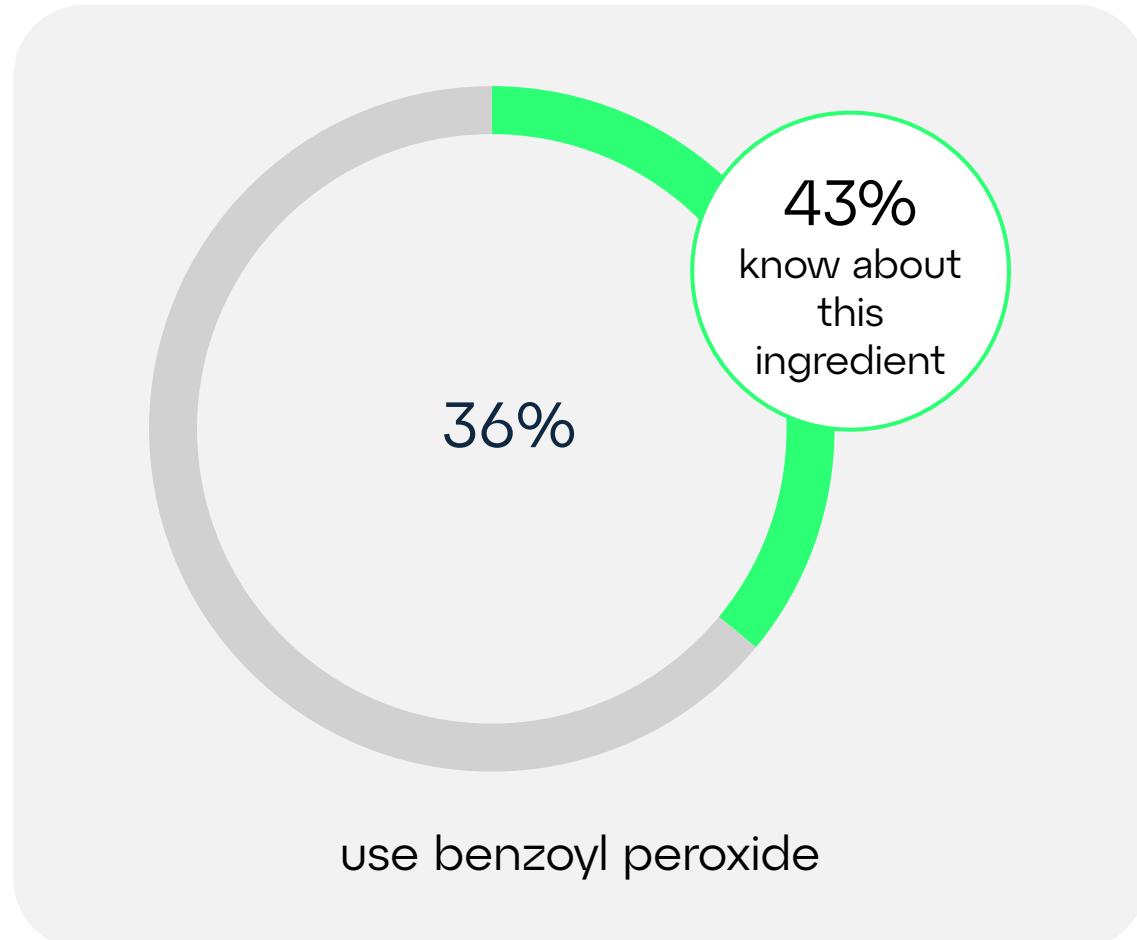
Teen Boys Have Elaborate Skin-care Routines, Too The TikTok-fueled adolescent beauty boom isn't just about girls shopping at Sephora.

Why are teens 'mewing' and what is the trend all about?

Gen Alpha boys are starting as early as eight years old to develop full-fledged beauty and skincare routines.

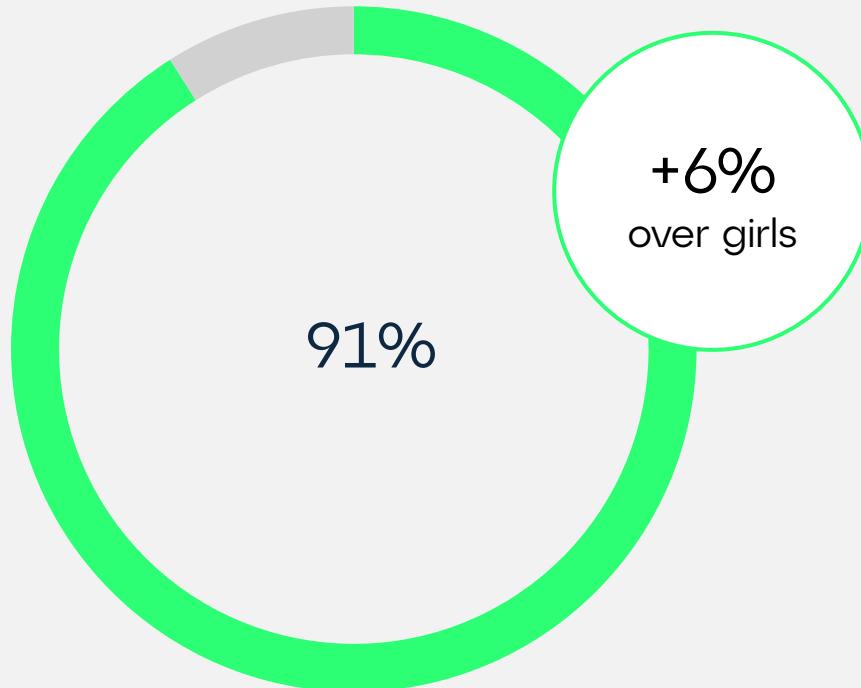
A social trend pushing this routine adoption is "looksmaxxing," a term for finding ways to improve your appearance. One such hack is "mewing," which is about making the jaw look more defined. This mewing tutorial from @milos.ru on TikTok has 17.8M views, while #mewing has amassed nearly 526k posts.

Gen Alpha boys are 1.4x more likely than girls to claim that they know about an ingredient that they use

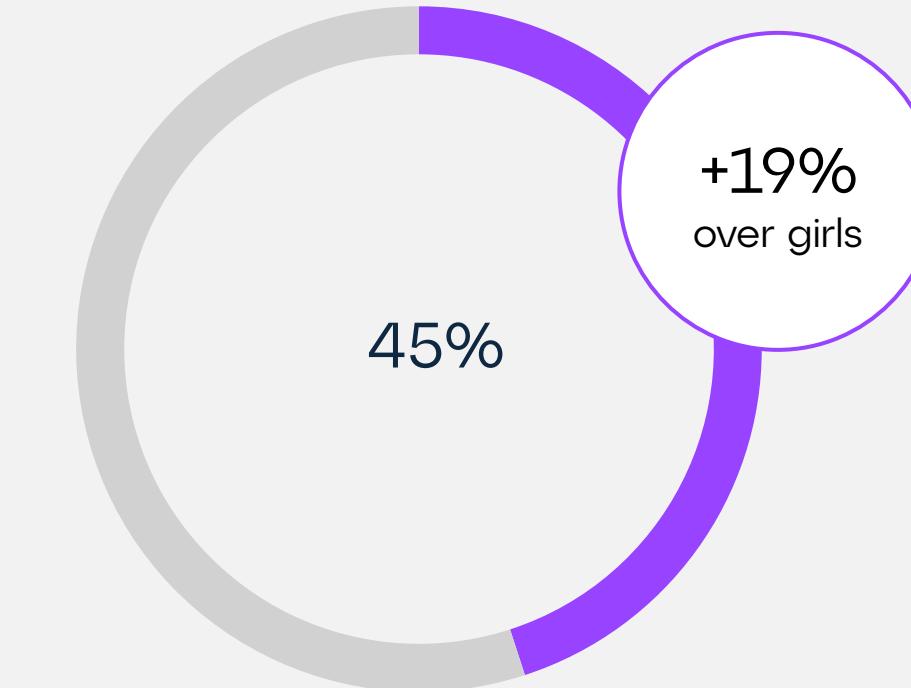


Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these things are you interested in? (q13); Which of these do you agree with? (q11)

Gen Alpha boys crave autonomy even more, but parents continue to make the purchasing decisions



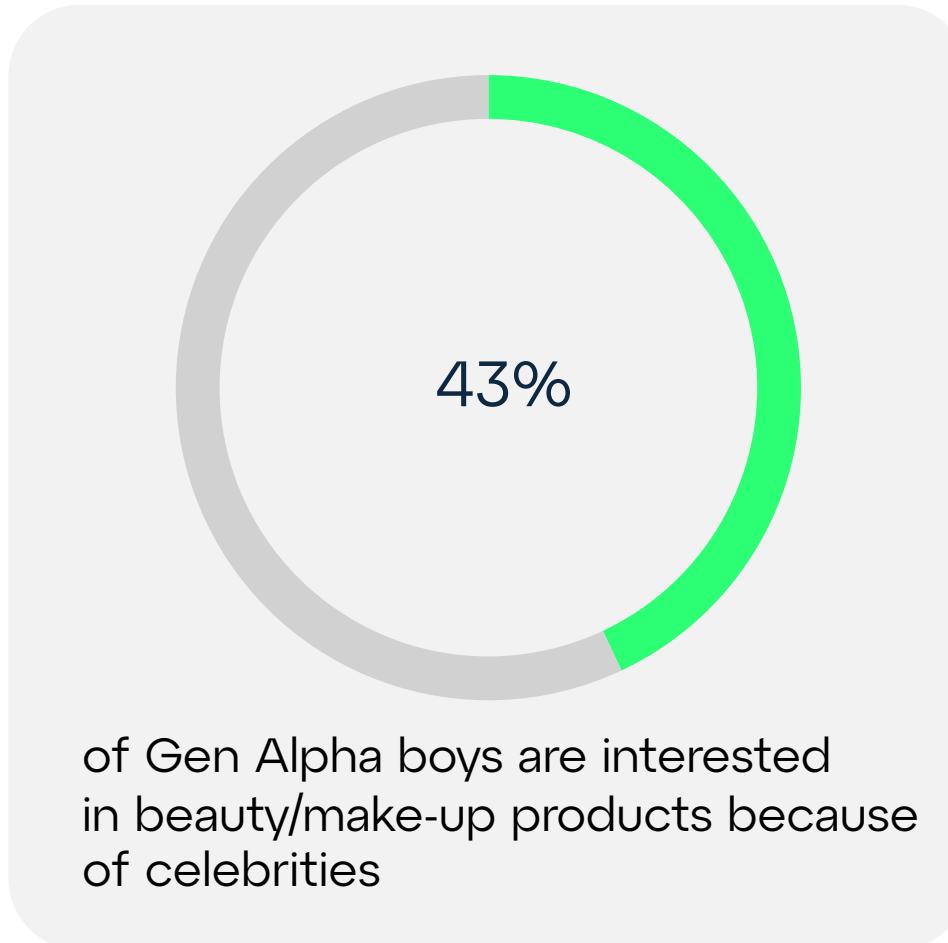
want to make decisions about skincare on their own without their parents



are more likely to have parents make product decisions for them

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these things are you interested in? (q13); Which of these do you agree with? (q11)

Celebrities are driving interest among Gen Alpha boys in beauty/make-up

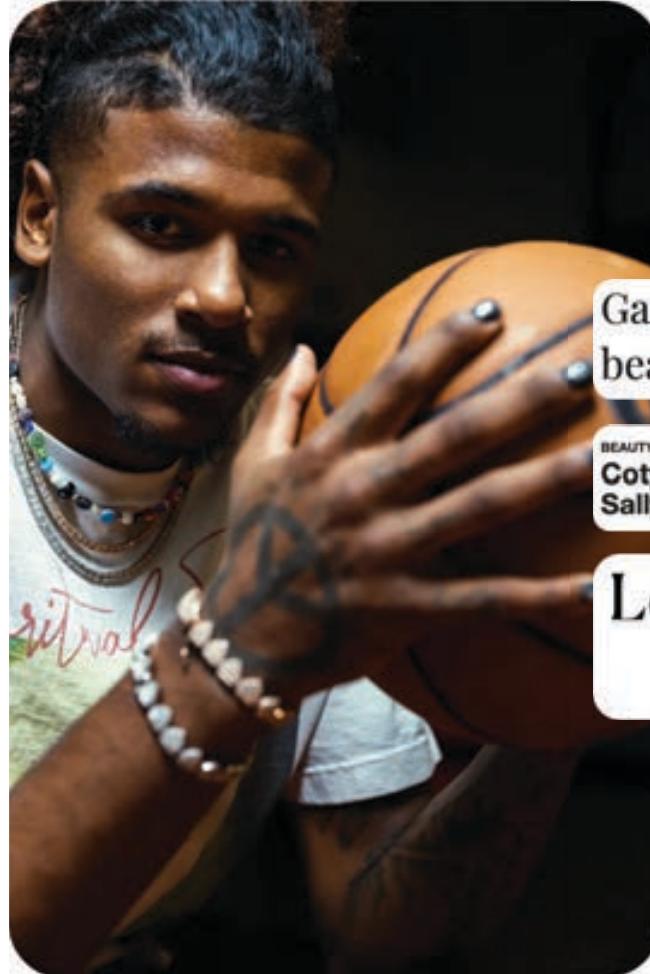


Gen Alpha boys are
1.7x more likely

than Gen Alpha girls to take interest in beauty/make-up products because of celebrities

Source: Razorfish Gen Alpha Beauty Survey. **Base:** Interested in beauty/skincare (n=449). **Question:** Which of these things are you interested in? (q13); Which of these do you agree with? (q11)

Beauty is tapping into untapped celeb power



Game changers: Male athletes score big as beauty brands' makeup ambassadors

BEAUTY
Coty Announces College Basketball Star Jared McCain as Sally Hansen Ambassador

Lebron James Is Launching a Male Beauty Brand

Male athletes, particularly within the NBA, are the newest faces of beauty brands. Such partnerships provide positive role models for Gen Alpha boys as they navigate the beauty space and masculinity.

Implications for brands

01

Not just dabbling, Gen Alpha are serious beauty consumers

With at least 2+ skincare products in their daily regimen that span a variety of different formats from face masks to oils to serums, Alphas already have sophisticated skincare habits.

02

Beauty brands can regain cultural traction by engaging Gen Alphas

Beauty has gained social currency the way sneakers and cool bags once did. A vast majority compare beauty brands with friends, make GRWM content, follow beauty influencers, are interested in teaching a parent or friend their beauty routine and aspire to have IRL social gatherings in Sephora. This could be a particularly relevant way for legacy brands to reinvigorate themselves.

03

Brands can lead the way in demystifying ingredients and promoting safe usage

Gen Alpha's influence in the beauty space outweighs their knowledge. 69% are already worried about aging and are unknowingly using several ingredients that are unsafe for their young skin. Like Dove, brands have the opportunity to educate and shepherd age-appropriate solutions.

04

Don't assume their interests align with traditional gender roles

Health, wellness and beauty have become gender-neutral topics for Gen Alpha, with boys adopting more robust skincare routines. Marketers will need to understand the unique motivations driving this emerging cohort of skincare enthusiasts.

Methodology

Fresh

At GWI, we have a wider panel of over **17 million respondents** that we can contact to gain insight from for bespoke research needs. These respondents span over 100 countries and allow you to access niche audiences that we can't get through recontact methodology.

Beauty audience

Given the subject matter, we asked initial questions on beauty/skincare to respondents aged 11+. Follow-up questions were asked to respondents who indicated an interest in beauty.

Fieldwork dates

Start: October 23, 2024

Finish: October 29, 2024

Audience achieved

Total: 1,001 kids aged 9-13

- 200 9-year-olds
- 195 10-year-olds
- 202 11-year olds
- 187 12-year-olds
- 217 13-year-olds

Country

USA

Thank You