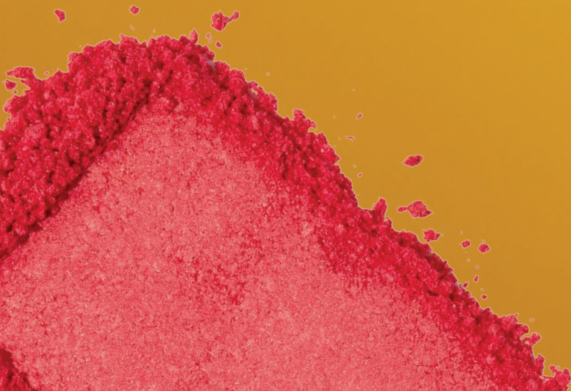




Introducing Generation Joy

Defined by beauty enthusiasts of all ages, united by joy



WHO IS *Generation Joy?*

Throughout history, beauty has played a meaningful role in culture and lives, empowering self-expression, influencing emotional wellbeing and inspiring creativity and imagination. The role of beauty can be studied from centuries dating back even to ancient times, with beauty rituals continuing to be passed down through generations. Beauty is deeply ingrained in the human experience and although it's evolved over time, one sentiment remains the same: beauty discovery brings joy. But to truly understand the unique bond between beauty and joy, we must first define joy. Unlike fleeting emotions, joy is a deep sense of happiness and contentment that tends to have a lasting and profound impact on one's wellbeing.

Given beauty's emotional resonance, leading beauty retailer Ulta Beauty has done extensive research to uncover how consumers across generations¹ perceive, experience and are influenced by beauty and how joy is the cornerstone of beauty rituals developed over time. In this report we've zoned in on Generation Joy: beauty consumers across all generations including the newest one, Gen Alpha.

Leveraging proprietary insights and data from U.S. beauty consumers², the following report reveals the other side of the beauty conversation not always reflected — from self-love and confidence being major definers of beauty across all generations to Gen Alpha viewing beauty as a forum for self-expression, fun and **JOY**.

With current mixed perceptions surrounding Gen Alpha³ and their interest in the beauty category, the data shows that this new generation is experimenting with beauty at an earlier age—though not alone. Their parents have a strong influence on how they perceive beauty and are supportive of their exploration into the beauty space, with Gen Alpha viewing beauty as a form of self-care that is integrated into their overall wellness routine.



“Those of us who engage with beauty know it's so much more than how it makes us look, it's also about how it makes us feel. At Ulta Beauty, we're fascinated by the emotive powers beauty has and how one single product can spark moments of creativity, joy and lifelong memories. As we learn more about the unique needs of beauty enthusiasts across generations, it's abundantly clear that we're all united by the joy beauty brings.”

—Michelle Crossan-Matos,
CMO of Ulta Beauty



BEAUTY + WELLNESS ROUTINES BRING *joy* TO GENERATIONS

Regardless of their age, every generation has similar feelings on beauty, emphasizing **confidence, self-love, and self-care** as top attributes. Gen Z defines beauty as “being your authentic self,” while Gen Alpha’s definition is being actively molded by their parent’s values, with self-care at the center. All generations **look to self-care to increase joy** in their lives - with **77%** agreeing that **maintaining a beauty or wellness routine helps them feel more joyful** on a day-to-day basis⁴. Compared to other generations, Gen Alpha and Gen Z are also more likely to define beauty as “fun.”

Though it’s often assumed that beauty rules are less rigid with Gen Alpha, data suggests that nearly every generation has or has had beauty standards in place. However, these guidelines vary across generations—ranging from having to wait until a certain age to wear makeup, put on fake nails, pluck their eyebrows, shave, or dye their hair.



⁴Ulta Beauty: Exploring the Pursuit of Joy Proprietary Research, 2023

Gen Alpha is **27%** less likely to be required to wait until a certain age to wear makeup compared to other generations. They’re also **2X** more likely to use products containing specific ingredients, indicating that parents are being watchful of the beauty products that this generation is putting on their skin.



GEN ALPHA *engages* WITH BEAUTY EARLIER THAN PREVIOUS GENERATIONS

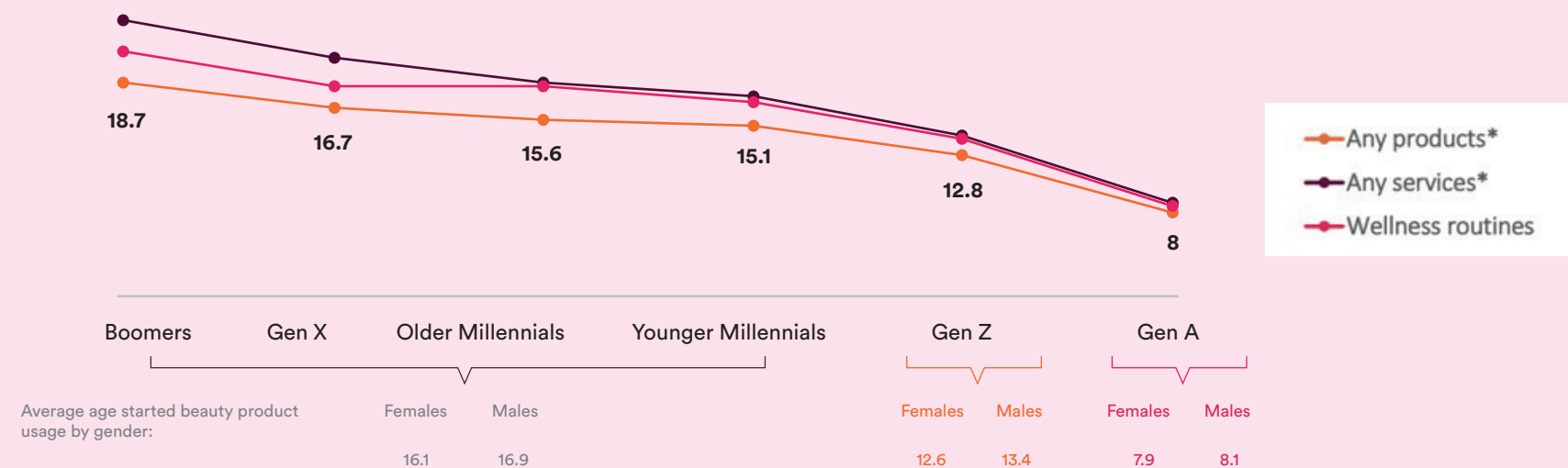
93% of teens and adults believe that they, personally, deserve to experience joy and happiness in their life—and beauty discovery helps fuel feelings of joy. While Gen Z females started experimenting with beauty products and services around age 13, Gen Alpha is eclipsing them by five years – starting at the average age of 8 for females and males.

This difference in those who identify as male versus female, defined by average starting age, has virtually closed among Gen Alpha. Males are now just as interested in beauty and personal care brands and products as women are, with approximately 30% of males expressing they are ‘very interested’ in beauty and personal care products, with strong opinions and preferences around brands/products.

Gen Alpha’s top beauty goals center around cleanliness, hydration and enhancing natural beauty, with bath and body products being their top purchases. As the generation gets older, their routines become more specialized, with an added emphasis on skincare and beauty products for varying need states or age-related concerns (e.g. acne, etc.).



AVERAGE AGE ENGAGING WITH BEAUTY PRODUCTS, SERVICES + WELLNESS ROUTINES
Among those that have already started

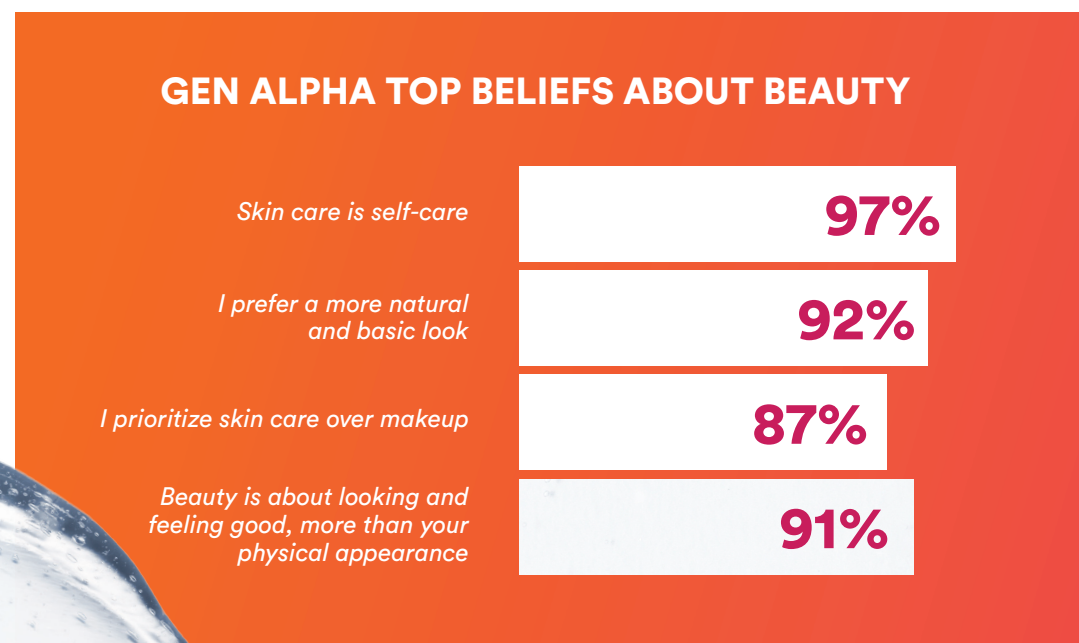


*Any product except shampoo/conditioner; Any service except hair cuts

FOR GEN ALPHA, BEAUTY + SELF-CARE = *joy*

Not only does Gen Alpha begin to experiment with beauty products at an earlier age than previous generations, but they also start more **concretely defining what beauty means to them around the age of 11**. For this generation, the definition evolves beyond physical appearance to focus more on taking care of yourself holistically, both physically and mentally.

94% of teens and adults believe that feeling joy in life is essential to the wellbeing of every individual. For Gen Alpha, beauty is an important part of their self-care routine and wellbeing. This generation forms an emotional connection with beauty more deeply and earlier than previous generations, and they're interested in products that meet both their functional and emotional needs. For both Gen Alpha and Gen Z, beauty routines positively impact emotional wellbeing more than previous generations, **eliciting feelings of joy as they experiment and engage with beauty.**



“We’ve always known beauty to be deeply personal and emotional, and we’re seeing that connection grow stronger among younger consumers. We saw this intensity for beauty and wellness really blossom with Gen Z, and now Gen Alpha is eagerly following in their footsteps. It’s refreshing to see our guests embracing self-care and prioritizing their holistic wellbeing at younger ages as this helps establish a healthy relationship with beauty that can grow into healthy, lifelong habits. That’s why we’re focused on building an assortment with age appropriate solutions that support varying life stages.”

—Monica Arnaudo,
Chief Merchandising Officer, Ulta Beauty



PARENTS OF GEN ALPHA ARE *supportive* OF BEAUTY DISCOVERY

Taking a deeper dive into Ulta Beauty Rewards Members who are parents to Gen Alpha, **77% say they are somewhat or very encouraging of their child's interest in beauty.** In fact, over **two-thirds of these Gen Alpha parents agree that it is healthy and “normal” for their child to want to explore beauty at their age.**

79% of parents of Gen Alpha want to play an active role in their child's beauty discovery, and 70% view beauty and beauty routines as a way to bond with their child.

“**My child is still young, but I will always encourage her to discover the fun in taking care of herself. These products are tools for us to take care of our bodies [and] it's fun to utilize beauty products as an extension of ourselves.**”

—Ulta Beauty Rewards Member and Parent of Gen Alpha

“**It is important that children have the opportunity for self discovery in developing their personal identity. Beauty is a huge component of that.**”

—Ulta Beauty Rewards Member and Parent of Gen Alpha



BEAUTY INFLUENCES VARY BY *generation*

The importance of parental influence declines significantly as consumers age, while the importance of content created by brands and influencers – both well-known and emerging – becomes much more important in teen years and early adulthood.

Gen Alpha is absorbing ideas about beauty from the two generations before them (Gen Z and Millennials). From playing with their mom's makeup to watching a best friend get ready for a special occasion, beauty rituals are passed down to this younger generation via their parents and peers and inspire how they experiment with beauty products.

Gen Z turns to online resources for information, though they're more skeptical when it comes to social media, closely vetting who they follow online to ensure authenticity and trustworthiness. They also appreciate and value in-person experiences, as they want to experiment with products in real life.

For Millennials, Gen Xers, and Boomers, online reviews, brand websites and seeing brands/products in-store carry the most weight in informing their beauty purchases.

“ Showcasing how beauty connects us, Gen Alpha is likely mimicking the interests of their Millennial parents. But as they grow, they will develop their own preferences and opinions on what their skin needs and what brands match their values. Developing appropriate products and continued education will be key to ensuring our littlest consumers remain safe and engaged as they grow into lifelong beauty users.”

— Larissa Jensen,
Senior Vice President and Global Beauty Industry Advisor
at Circana



“ Gen Alpha and Gen Z have grown up online, and are extremely savvy when it comes to social media. These consumers view brands as an extension of themselves and look for brands that align with their beliefs. They can see right through the inauthenticity, so ensuring they feel listened to and are part of the conversation is key to building authentic relationships with the younger generations.”

— Shai Eisenman,
Founder and CEO of Bubble Skincare



BONDED BY BEAUTY, UNITED BY *joy!*

Generation Joy represents all of us – no matter our age, interests, influence, or needs. Together, we believe beauty is a positive force for good and define it as a form of self-love and confidence. As the newest generation – Gen Alpha – sets out on their journey of discovering new, beautiful possibilities, Generation Joy is embracing beauty in a whole new way, with self-care and physical and emotional wellbeing at the center. Among Ulta Beauty shoppers, a majority of parents of Gen Alpha actively believe it is healthy to explore beauty and are encouraging their children to do so. As an industry, we have a unique opportunity to embrace this new generation’s fascination with the beauty space with optimism. **Together, we can highlight the positive and joyful moments that beauty can have for us all.**

