

From Playground to Purchase: **How Gen Alpha is Shaping Beauty Choices in Asia**

Toluna conducted an online survey in June 2026 among mothers of Gen Alpha kids across China, Korea, and Indonesia (n=100 per market) to understand early beauty adoption, shared purchase decisions, and brand choice drivers.



1.

Beauty adoption starts young in Asia

- **54%** of Chinese girls start at **ages 8–10**
- **54%** of Korean and Indonesian girls start at **ages 11–13**



2.

Shared Truths Across Markets

- ✓ **Mothers always play a role**
 - In every market, mothers remain a meaningful influence. Even where daughters lead, mothers still:
 - **Check safety**
 - **Control budget**
 - **Act as final approval layer**
 - Mothers are never removed—only shift from **decision-maker** → **validator**
- ✓ **Functional factors are critical everywhere**
 - **Skin suitability**
 - **Safety / ingredients**
 - **Effectiveness / practical benefits**
 - This shows **beauty is not purely emotional**—especially for younger users.
- ✓ **Hybrid decision-making is the norm**
 - “Co-decision” appears in all 3 markets
 - The difference is **who leads vs who validates**

3.

How the market differs



Mother-led, safety-first ecosystem



- **50% Partial influence:** "My daughter tells me what brands she likes—we each decide about half. I still consider safety overall."
- **30% Mother-led:** "After doing research, I choose the brand."
- **20% Strong influence:** "She always picks the brands she likes. She decides everything—I just pay."

Strong emphasis on:

- Safety
- Quality
- Brand reputation



Key Implication

Trust, credibility, and reassurance matter more than trend; Social influence is secondary



Daughter-led, knowledge-driven decisions



- **40% Daughter-led:** Daughter independently drives choices based on her own needs/preferences
- **35% Mother-led:** Mother retains control, focusing on functional and safety factors; Safety, quality, and budget focused
- **25% Co decision:** Daughter leads preferences, Mother validates and finalizes

Strong "self" signals:

- Personal choice
- Skin-specific needs
- Reviews-driven decisions
- Mature, informed young consumer behavior



Key Implication

The most sophisticated, self-directed market; content must be informational, detailed, and credible (reviews > hype)



Social-first, discovery-driven market



- **40% Daughter-led social media driven discovery:** Purchase intent is heavily influenced by digital content and trends
- **30% Joint research driven:** Decisions are driven by active research and validation
- **25% Mother-led:** Mother filters or owns the final decision (safety, suitability, and control)
- **5% Preference/peer led:** Individual taste + social circle shape preferences

"Social media" is the largest and most dominant driver:

- TikTok, Instagram, influencers drive initial intent
- Followed by research (strong validation step)



Key Implication

The most digitally influenced funnel; social = trigger, research = justification