



BeautyGeneration 2026

ICON KIDS
& YOUTH

Foundational Quantitative Study: Styling and Care among German Gen A and Gen Z

February 2026

iconkids & youth international research GmbH

Rückertstraße 4 | 80336 Munich | Germany
info@iconkids.com - www.iconkids.com



Picture: Fotolia

The Styling & Care market for Teenagers and Young Adults in one study.

Market success comes from a deep
understanding of young people.

That's why we ask them in the
BeautyGeneration 2026 study.
With all necessary detail and depth.

Find out more about the **WHO**, the
WHAT and the **HOW** in this
presentation.

The WHO

BeautyGeneration 2026 focuses on 10- to 29-year-olds.
The most exciting and most difficult target group of all!

A unique foundational study that **takes this diverse target group seriously** and respects them in all their complexity and individuality.

BeautyGeneration 2026 is rooted in a profound understanding of **developmental psychological differences** between age groups and genders that define **product needs**.



The WHO

The sample for the BeautyGeneration 2026 study in detail.

The Study: The WHO

	Entry Age 10-13 years	Exploration Age 14-17 years	Fine-Tuning Age 18-22 years	Established Age 23-29 years
Sample size	n = 150 boys n = 300 girls*	n = 150 boys n = 300 girls*	n = 150 men n = 300 women*	n = 150 men n = 300 women*
Care & Styling Motivation	Avoidance <i>I don't want to attract negative attention!</i> Confrontation with massive physical changes and associated problems. Fear of mistakes and isolation!	Exploration <i>I want to become cool and attractive.</i> Quest for one's own personality in a phase of dramatic physical and mental changes.	Self-reinforcement <i>I want to live up to each situation.</i> Enhance the personality that is largely found by now and search for new facets to enrich and actualize it.	Self-affirmation <i>I want to feel good about myself.</i> Support and refine one's personality within a self-defined territory.
Care & Styling Core Need	Reassurance <i>Help me to feel safe & good!</i> Solve problems, allow integration, give self-confidence.	Individualization <i>Help me to feel special!</i> Provide playgrounds and tools for the development of one's personality and sexuality.	Inspiration <i>Help me to be my best ME!</i> Provide individual and up-to-date suggestions for specific situations, needs, problems.	Solution <i>Give me what serves my needs and wants.</i> Provide the best possible product for the identified tasks that need to be done.

* More female respondents because more product categories have to be covered.

The WHAT

BeautyGeneration 2026 makes a complex market tangible – with **separate analyses for the most relevant **Styling & Care Categories**.**

These categories will be analyzed in detail (see next pages):

Hair care (shampoo, conditioner, hair mask ...)

Hair styling (spray, gel, coloring, hair perfume ...)

Face care (washing gel / lotion, masks, pimple patches, creams, lotions, lip balm, ...)

Body care (shower gel, creams, deodorant)

Shaving (razor, epilator, cream, foam, balm ...)

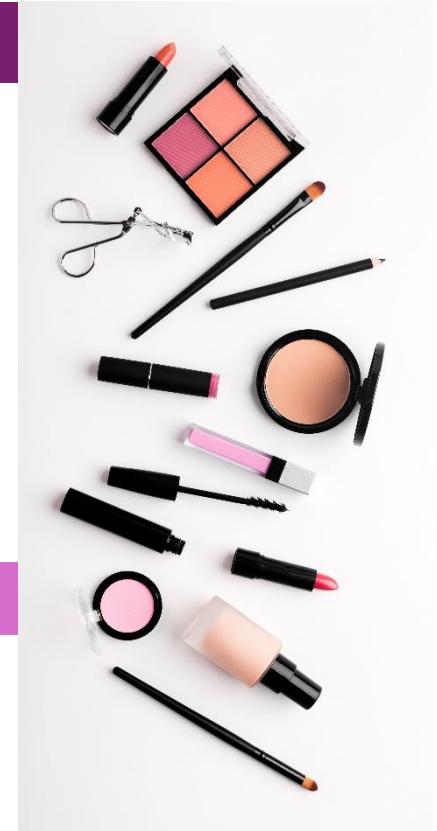
Girls: **Decorative cosmetics** (make-up, mascara, concealer, lipstick, nail polish ...)

Usage analysis only (category usage, usage frequency):

Fragrance / Scented Products (EdT, perfume, body spray)

Sun protection

Bath additives and other bath products



The HOW

Content of the Foundational Study BeautyGeneration 2026.

The Study: The HOW

<p>Understanding Gen A and Gen Z <i>(NB: This section is the foundation for the market segmentation – see pages 7/8)</i></p>	<p>Psychography</p>	<p>How do young consumers perceive themselves?</p>
	<p>Beauty Attitudes</p>	<p>How do they feel about beauty & care and how does this shape their behavior?</p>
<p>Understanding the STYLING & CARE MARKET <i>(Analysis per category)</i></p>	<p>Product Usage</p>	<p>Which products are used, how often, on what occasions?</p>
	<p>Purchase Process</p>	<p>Where are the products bought?</p>
	<p>Touch Point Analysis</p>	<p>How do young consumers learn about brands & products, which touch points are decisive?</p>
	<p>Category Requirements</p>	<p>How important are product attributes (health claims, trendiness, quality claims etc. ...)? <i>Attribute list will be adapted for each category.</i></p>
	<p>Category Driver Analysis</p>	<p>What product attributes are decisive as purchase drivers in the various beauty categories?</p>
<p>Understanding STYLING & CARE BRANDS <i>(Analysis per category)</i></p>	<p>Brand Usage</p>	<p>Current brand usage (<i>open-ended question, unedited Excel list</i>)</p>
	<p>Brand Funnel</p>	<p>KPIs for 8 selected brands (prompted with logo): Brand awareness, brand appeal, brand usage, purchase intention (<i>brand list tbd</i>)</p>
	<p>Brand Mapping</p>	<p>Positioning of brands in the youth market based on the KPIs</p>

The HOW

The three levels of Analysis and Reporting

Level 1: Descriptive Reporting

All the numbers for all the questions.

Graphs / tables in a comprehensive PowerPoint report.

*Results will be provided with **double demographics**, i.e. split by age and gender. Action Titles on each slide and Management Summary per category.*

Get the full picture and close the gaps in your own data.

- **Market understanding:** What is the user structure for each product category and brand?
- **Consumer understanding:** Who buys what, where and WHY?
- **Touch Point Analysis:** How can you reach consumers?

Level 2: Statistical Driver Analysis

What really decides purchases.

Regression analysis to identify the significant purchase drivers

*Results will be provided **per category**. Action Titles on each slide and Management Summary per category.*

Get a better understanding what product characteristics and touch points are most relevant for the purchase of products.

- **Products & benefits:** What are the must-haves, what is nice-to-have, what is not relevant at all?
- **Touch Points:** What is most convincing for consumers?

Level 3: Market Segmentation

How to win Gen A and Gen Z.

Segmentation analysis to identify relevant target groups.

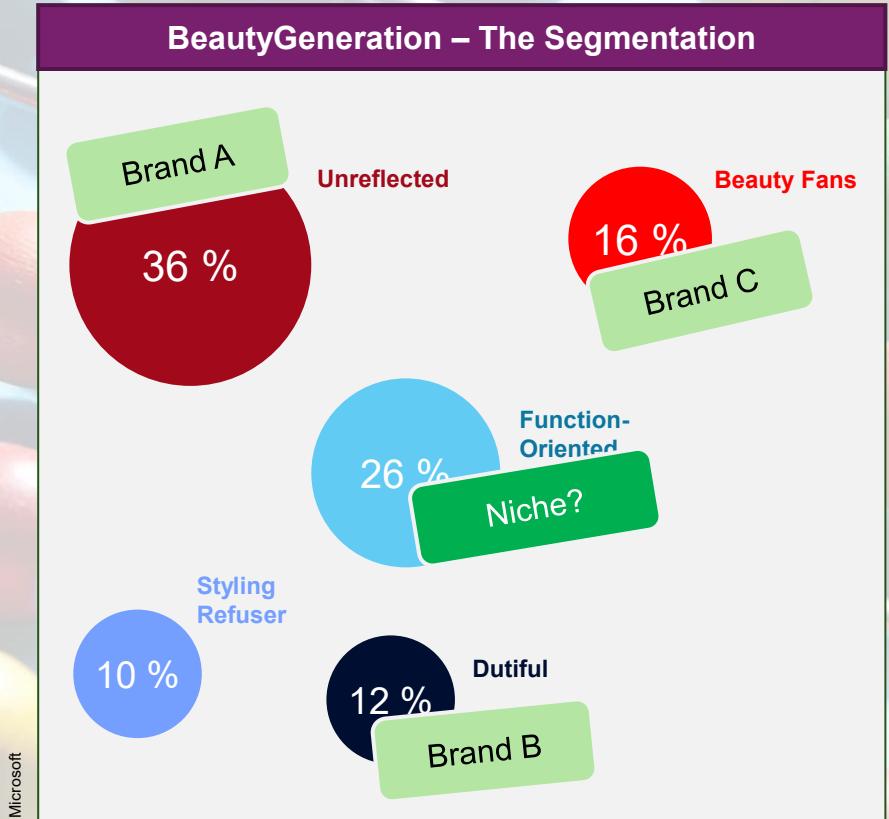
*Analysis of the **total sample**; segments will be described with **Personas**. Touch points, brand usage and driver analysis per category for each market segment.*

Social Media allow you to address diverse segments with tailor-made messages and products – and this analysis shows you how.

- **Brand Mapping:** Brand & product usage in the segments.
- **Product & benefits:** What are the must-haves, what is nice-to-have, what is not relevant at all?
- **Touch Points:** What is most convincing for consumers?

The HOW

What is in the Segmentation for you?



Socio-demographics, Personal attitudes and the **individual approach to styling & care** are the foundation for the **BeautyGeneration Segmentation**.

BeautyGeneration makes a **diverse target group** tangible and shows you how **brands are positioned**:

- ▶ Which segment is the **Sweet Spot of your brand**, which segments are your **extended target group**?
- ▶ Which brands are your **key competitors**?

BeautyGeneration indicates the **market potential** for your brand:

- ▶ Which segments are already **highly competitive** and too over-crowded to be promising?
- ▶ Which segments are overlooked and underserved and, thus, may present an **opportunity for your brand**?

WHAT ELSE?

Do you want to know more? Order the **Optional Extension** for **YOUR Brand***!

Brand Data from the Foundational Study

Brand Status

Your brand and 2 main competitors will be covered in the brand section of the Foundational Study

Analysis based on the **Brand Section** of the **Foundational Study**

Analysis of the **brand and its positioning**:

- Purchase funnel based on main KPIs (Awareness, Appeal, Usage, Purchase Intention)
- Brand Mapping: Your brand positioned and analyzed in the segmentation to identify current and potential user segments

Brand Data from the Optional Extension

Brand Evaluation

Your brand and 2 main competitors will be evaluated in detail

Touch Points & Purchase

Where is your brand **visible**, where is it **bought**?

Brand Usage

How **often** is your brand **used** and for which **occasions**?

Brand Perception

What are the **strengths and weaknesses** of your brand vs. your 2 key competitors?

Brand Drivers

What **attributes** are decisive as **purchase drivers** for your brand vs. the **category drivers**?

*Analysis of brands based on the brand perception in the analyzed product category. No differentiation according to individual products. Additional costs apply if the Brand Evaluation covers more than one product category.

BeautyGeneration 2026

One-Pager

Study Profile

Method and sample
<ul style="list-style-type: none"> Online survey of n = 1.800 young consumers aged 10 to 29 years in Germany Online representative sample
Product categories: (n = 600 each, two categories per interview)
Hair Care (shampoo, conditioner, hair mask ...)
Hair Styling (spray, gel, coloring, hair perfume ...)
Facial Care (washing gel / lotion, masks, pimple patches, face creams, lotions, lip balm, ...)
Body Care (shower gel, body lotion, body creams, deodorant)
Shaving (razor, epilator, cream, foam, balm ...)
Girls: Decorative cosmetics (make-up, mascara, concealer, lipstick, nail polish ...)

Study Content			
Foundational Study BeautyGeneration 2026	UNDERSTANDING GEN A & GEN Z	Psychography	How do they see themselves ?
		Beauty Attitudes	How do they feel about styling & care ?
	STYLING & CARE MARKET (analysis per category)	Product Usage	Which products are used and how often ?
		Purchase Process	Where are the products bought?
		Touch Point Analysis	How do they learn about brands & products ?
		Category Requirements & Drivers	What product attributes are decisive as purchase drivers in the categories?
		Brand Usage	Current brand usage (unedited Excel list)
		Brand Funnel	KPIs for 8 selected brands
		Brand Mapping	Positioning of brands in the market
	Brand Extension (optional)	Touch Points & Purchase	Where is your brand visible , where is it bought ?
		Brand Usage in detail	Usage occasions of your brand?
		Brand Perception	Strengths and weaknesses of your brand?
		Brand Drivers	Purchase drivers for your brand vs. the category?

Costs:

The Foundational Study BeautyGeneration 2026

€ 7.900,--

PowerPoint report including: Analysis by gender and four age groups (10-13 years, 14-17 years, 18-22 years, 23-29 years) for category and brand usage, Segmentation based on the total sample (n = 1.800), and driver analysis for each of the six categories (n = 250 - 400 each).

The Brand Extension for your brand

€ 3.400,--

Costs per brand in one category incl. 2 competitors in the category
(Costs for adding one additional product category to the Brand Evaluation: 2.400,--)

Only in combination with the Foundational Study. Includes KPIs, integration into the Segmentation and individual Driver Analysis (required base for each analyzed brand: n = 80)

Timing:

Report: **The Foundational Study** April 2026

Report: **The Brand Extension** May - June 2026

This offer is non-binding.

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