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The State of Gen Z

A Generation in Transition

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About this report

Every day, Morning Consult tracks a wide range of habits, preferences, media behaviors and brand perceptions among Gen Z. We wanted to take a step back and look at how these are changing over time to gauge how Gen Z is evolving, the ways the young cohort are staying the same and even the ways the rest of the population is starting to shift along with them.

Data Source: All data in this report comes from [Morning Consult Intelligence](#).

Sample: The audience behavior and brand data throughout this report is based on surveys conducted from March 1, 2021 through March 31, 2022 and March 1, 2025 through March 31, 2026 among U.S. adults. The 2021–22 wave includes 281,194 respondents and the 2025–26 wave includes 322,505 respondents. Sample sizes per brand range from 500 to 38,046. The data on Gen Z’s favorite social media platforms came from a sample size of 14,365. The data on Gen Z’s social media activities came from sample sizes of 1,593 (Instagram), 1,528 (TikTok) and 693 (Reddit).

Net Trust: Trust scores reflect Morning Consult’s net trust measure, calculated as the share of respondents who say they trust a brand minus the share who say they distrust it. A positive score indicates more trust than distrust among the measured population; a negative score indicates the reverse. Scores can be compared directly across brands and audience segments.

Audience Segments: Generational cohorts are defined as follows: Generation Z (born 1997–2012), Millennials (born 1981–1996), Generation X (born 1965–1980), and Boomers (born 1946–1964).

Key Takeaways

1. Gen Z is transitioning major life milestones. The oldest Gen Zers are now approaching 30. Over the last four years, marriage rates rose from 9% to 15%, full-time employment grew from 64% to 72%, household financial responsibility climbed from 58% to 71%, and the share of students dropped from 25% to 16%.

2. But Gen Z is still the most mobile generation in America. Gen Z is starting new jobs at twice the total population's rate (34% vs. 16–18%), moving homes at nearly double the rate (31% vs. 18%), and still has 33% actively job-hunting vs. 23% of all adults.

3. Gen Z's political center shifted right during the Biden era, but that's a trend that's already starting to reverse. Political interest rose sharply: the share saying they are not at all interested in politics fell from 27% to 20%. Issue priorities are shifting in ways that reinforce the maturation throughline we see in this report.

4. Gen Z is more confident and more ambitious — and just as impulsive. The share of Gen Z who feel in control of their future rose from 61% to 67%, flipping from a slight under-index vs. the total population to a slight over-index. Yet the traits that define Gen Z as a consumer — impulsiveness, status-seeking, and trend-chasing — have not moved at all.

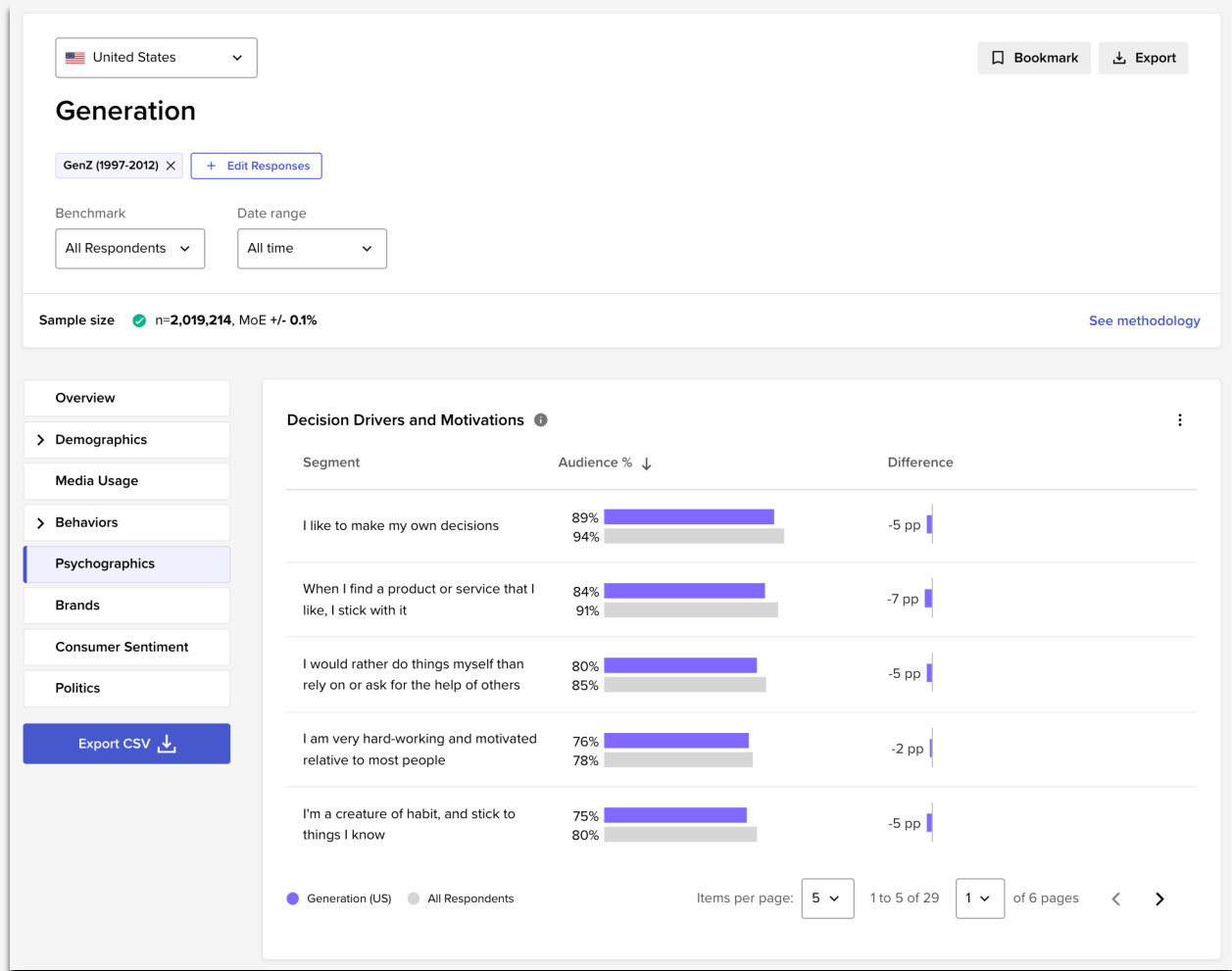
5. Social commerce crossed from Gen Z habit to mainstream behavior — and Gen Z led the way. The share of Gen Z who do purchase through social media rose from 51% to 66%, a 15-point climb. The total population moved nearly as fast, falling from 62% to 49%. All consumers are adopting TikTok, streaming platforms and podcasts at rates similar to where Gen Z was a few years ago.

How Gen Z has (and hasn't) changed

What's Changed	What Hasn't
Student share fell from 25% to 16%	Impulsiveness still over-indexes the total population by +15pp
Full-time employment rose from 64% to 72%	Status-seeking over-index unchanged at +19pp
Married share rose from 9% to 15%	Trend-chasing over-index unchanged at +14pp
Has children rose from 19% to 26%	Still a renting generation — 52% rent, barely moved since 2021
Income shifted up — under \$50K fell from 71% to 62%; \$100K+ grew from 8% to 10%	97% of brands still earn less trust from Gen Z than from all adults
Health insurance shifted off parents' plans (48% → 30%) onto employer and individual coverage	TikTok remains the #1 favorite platform at 32.8%
Job churn down within Gen Z — new job in past year fell from 42% to 34%	Job mobility still elevated in absolute terms — 33% actively job-hunting vs. 23% of all adults
Moving rate dropped from 36% to 31%	Netflix and Hulu usage held essentially flat
Feels in control of their future: 61% → 67%	
Strong sense of self: 70% → 79%	
Content with appearance: 61% → 69%	
Sets lots of goals: 67% → 75%	
Enjoys in-store shopping rose from 72% to 79%	
Republican ID rose from 17% to 24%; Independent ID fell from 50% to 43%	

Explore the Audience Behaviors and Psychographics of Gen Z

Data featured in this report comes from [Morning Consult Intelligence](#), the Always On Consumer Signal. The platform helps you understand your audience, brand, competitors and market in a way traditional research companies can't.



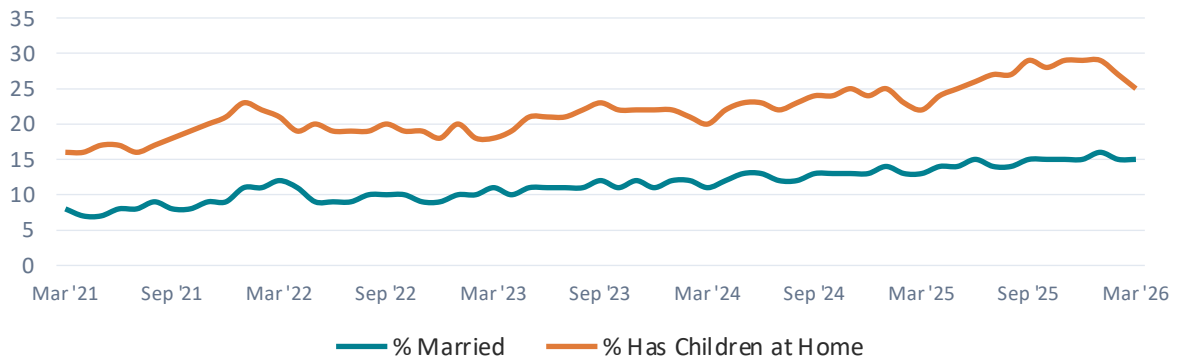
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Gen Z went from “adulting” to adults

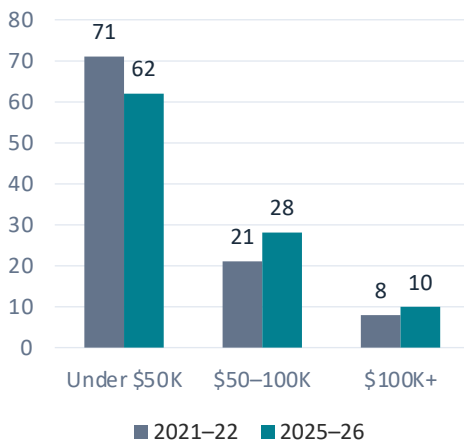
The most fundamental story in the demographic data is simple: Gen Z grew up. The share of Gen Z respondents identifying as students dropped from 25% to 16% — a 9-point swing that ripples through nearly every other data point in this report. Four years ago, a quarter of the cohort was still in school. Today, the majority are employed adults navigating rent, relationships, and real financial decisions.

That transition shows up clearly in household formation. The share of Gen Z who are married rose from 9% in 2021 to 15%, and those with children in the household climbed from 19% in 2021 to 26%. The "single, never married" share, while still dominant at 69%, has fallen from 75%, reflecting a cohort that is pairing off and settling down at a meaningful clip.

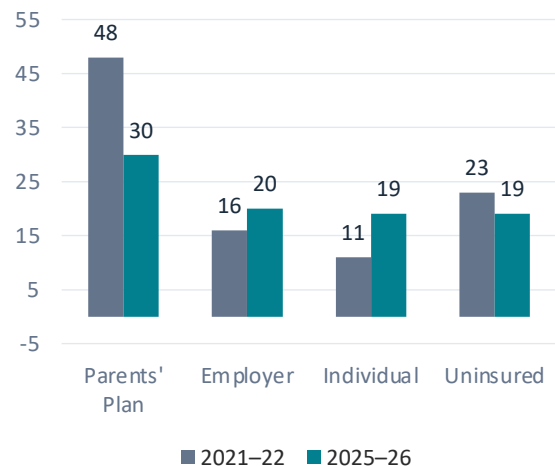
Gen Z is forming families



Income Distribution, Gen Z (%)



Health Insurance Type, Gen Z (%)

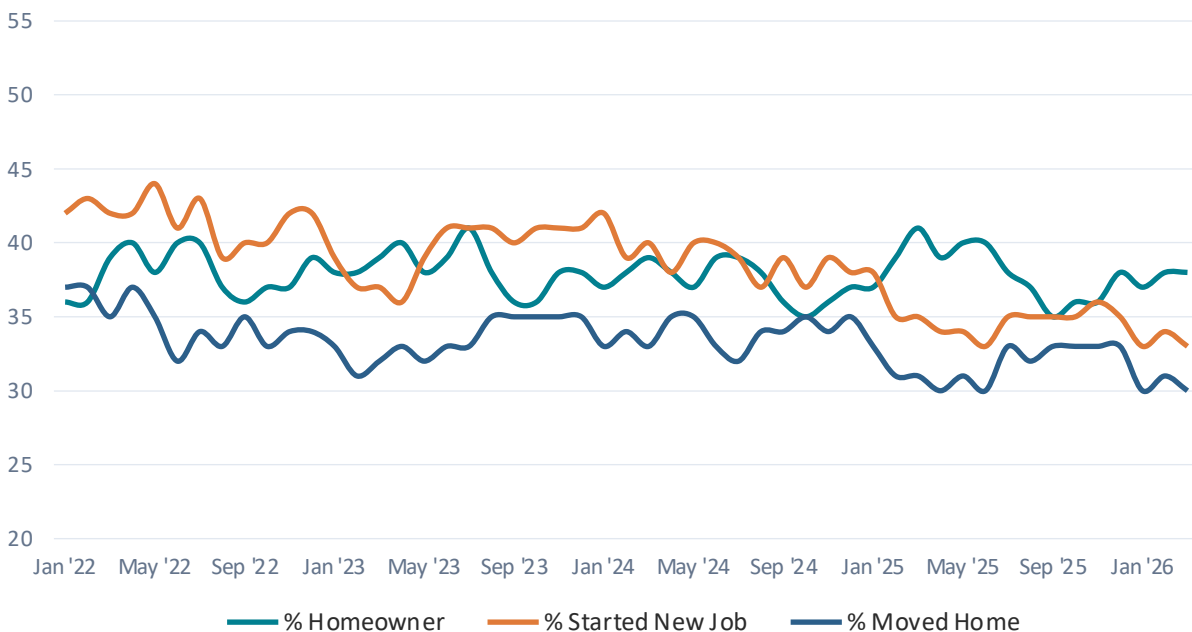


But Gen Z is far from settled down

Gen Z remains a renting generation — 52% are renters vs. 38% who own, a gap that has barely budged since 2021-22 (50% renters, 39% owners). This isn't surprising given the housing market they've come of age in, but the more interesting story is what's happening at the margins: Gen Z is stabilizing faster than the broader population across almost every measure of “churn.”

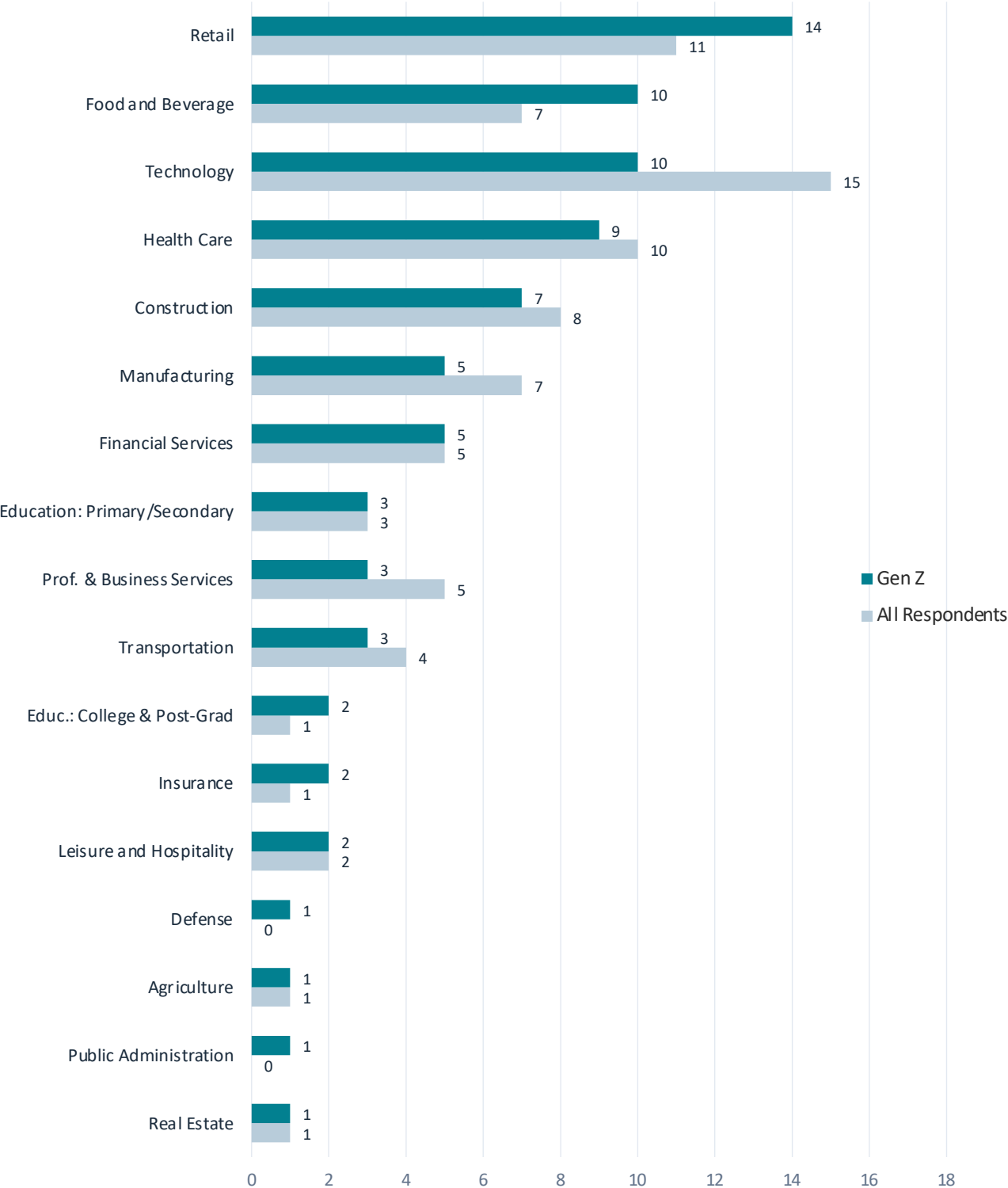
The share of Gen Z who started a new job in the past year dropped from 42% to 34%, while the total population held flat at around 16-18%. The share who moved to a new home dropped from 36% to 31%, while the total population again held flat at 18%. Gen Z didn't stop hustling so much as they began landing, settling into jobs, apartments, and routines at a faster rate than the broader population is shifting around. Job mobility is still elevated in absolute terms — 33% of Gen Z are actively applying for a new job, well above the total population's 23% — but the gap is narrowing. The total population's actively-applying share rose from 18% to 23% over the same period, meaning the rest of America is catching up to the instability Gen Z normalized.

Gen Z's home ownership rates, job churn and moving rates are staying relatively steady



Gen Z still over indexes on service industry jobs

% of Gen Zers employed by industry vs. all respondents ('other' not included)



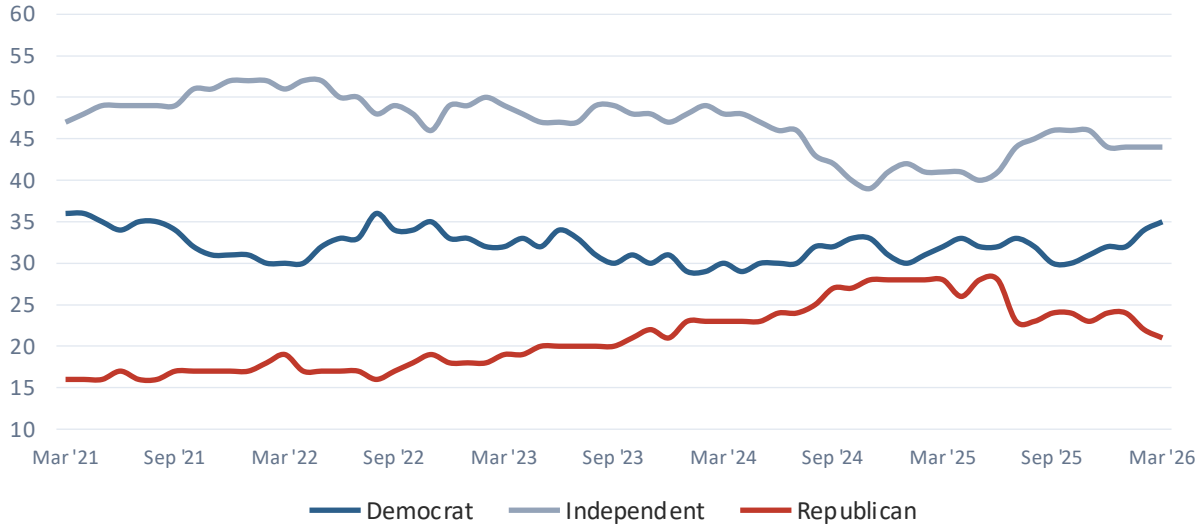
Gen Z briefly shifted right politically, but is already shifting back

Gen Z has long been cast as a reliably progressive generation, but the data tells a more complicated story. The cohort shifted to the right during the Biden era, but the trend is already showing signs of reversing. Democratic identification has held roughly flat at 33% to 32% — it's the independent identification that saw the biggest decline.

Issue priorities are shifting in ways that reinforce the maturation story. Economic concerns rose from 32% to 38% among Gen Z, now essentially matching the total population, while education issues fell from 11% to 8%, a direct reflection of fewer Gen Zers being students. Women's issues remains one of Gen Z's most distinctive policy priorities, still over-indexing vs. the total population at 13%.

Political interest also rose. The share saying they are "not at all interested" in politics fell from 27% to 20%, and those who are "extremely" or "very" interested grew from 24% to 33%. Gen Z is paying more attention, and increasingly doing so with a more ideologically diverse set of views than the conventional narrative suggests.

Party ID amongst Gen Z



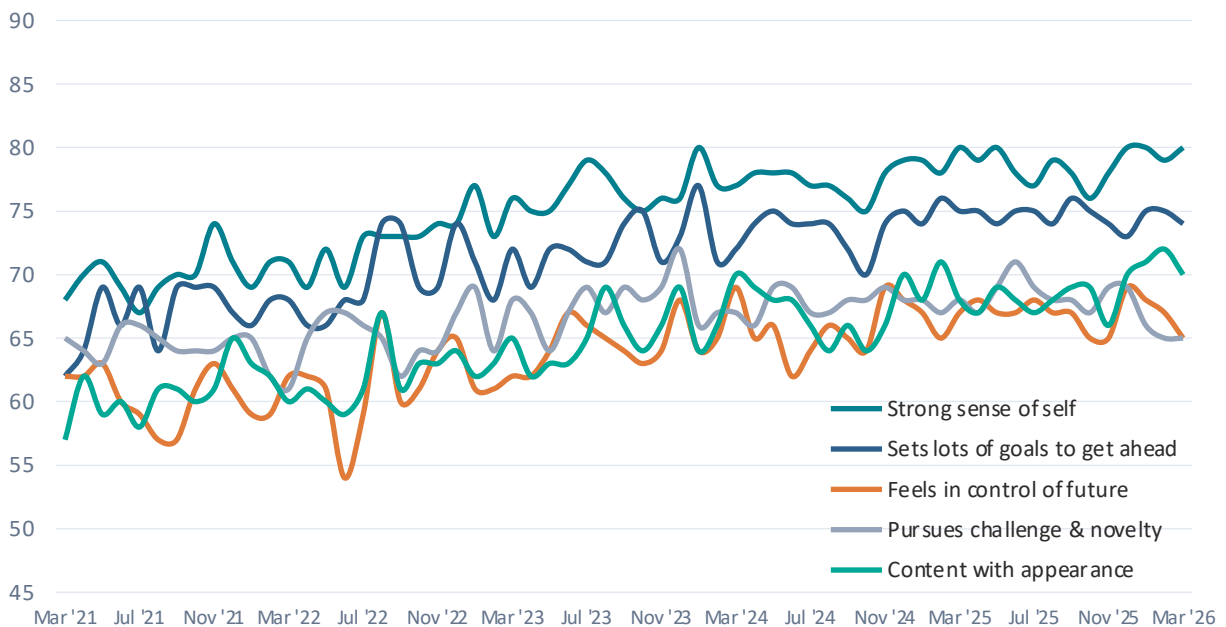
Gen Z has gone from anxious to confident

If the demographic data show a generation maturing on the outside, the psychographic data shows one growing more confident on the inside. 60% of Gen Z said they feel in control of their future in 2021-22, slightly below the total population. By 2025-26 that figure had risen to 67%. Four years ago Gen Z felt less in command of their futures than the average American. Today, it's the opposite.

That confidence is showing up in ambition as well. The share of Gen Z saying they set a lot of goals to get ahead rose from 67% to 75%, and those who say they like to pursue a life of challenge, novelty, and change grew from 64% to 68%, both now meaningfully over-indexing vs. the total population.

Self-perception is improving across the board. The share of Gen Z saying they have a very strong sense of self rose from 70% to 79%, and those content with their appearance climbed from 61% to 69%, nearly closing a gap with the total population entirely. Gen Z is arriving at adulthood with a clearer, more settled sense of who they are. Brands that market to their insecurities may find that playbook out of date.

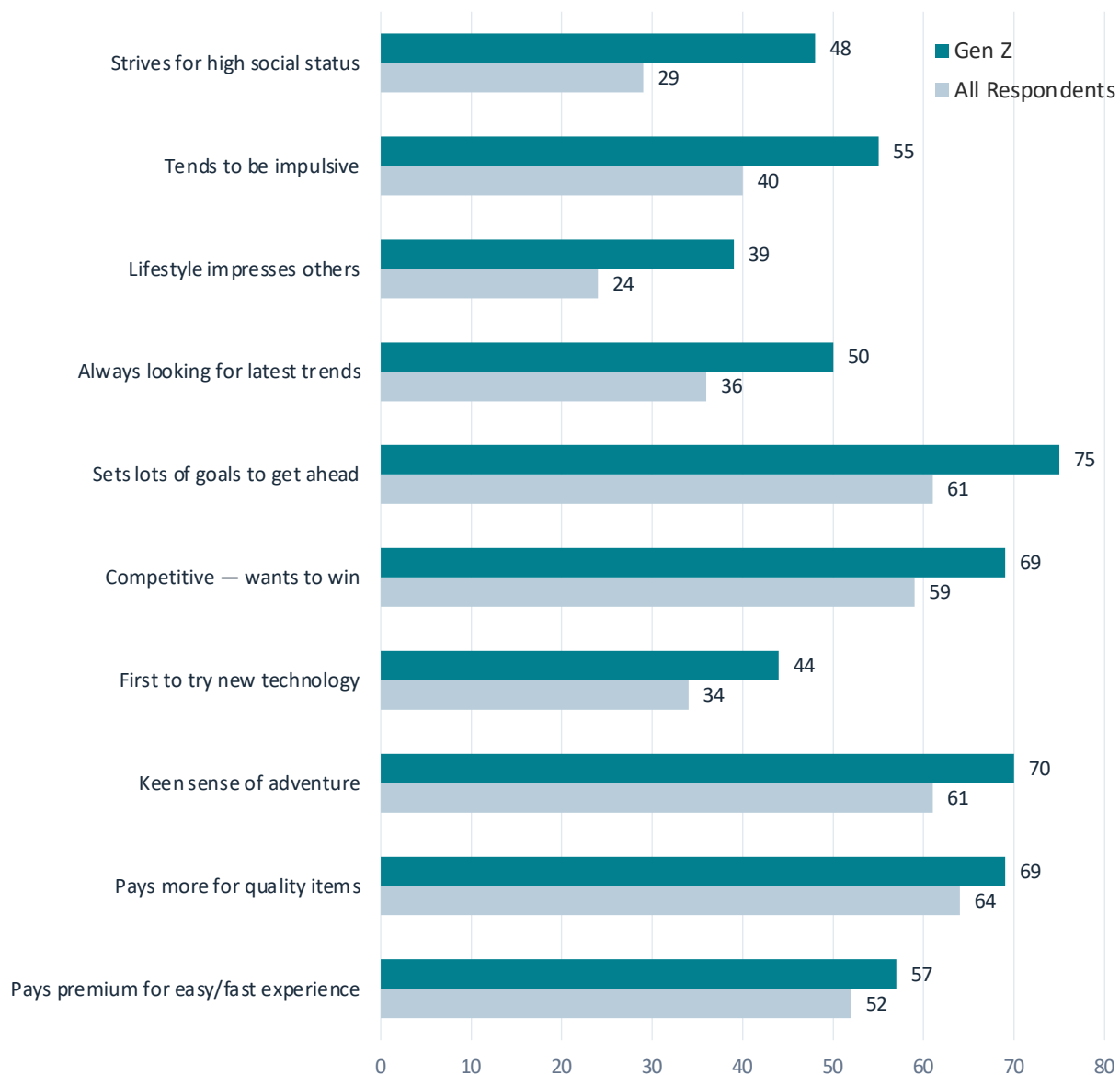
Gen Z's growing confidence and agency



But the traits that define Gen Z haven't changed

Some traits have barely moved at all. Impulsiveness remains at a +15pp over-index vs. the total, status-seeking at +19pp, and trend-chasing at +14pp. The aspiration-driven, novelty-hungry core of Gen Z's consumer identity is fully intact. What's changed is the financial agency behind it — a cohort that was impulsive on a student budget is now impulsive with a paycheck.

The psychographics that separate Gen Z from the rest of the population

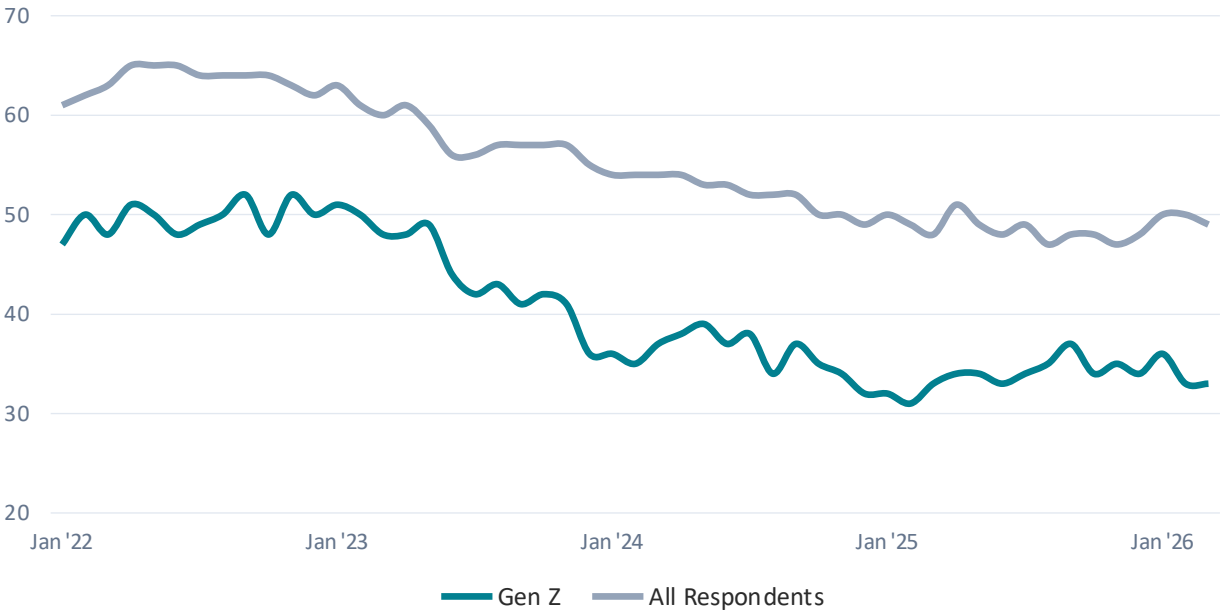


The rest of America is adopting Gen Z habits and behaviors

The share of Gen Z who say they do not make purchases through social media fell from 49% to 34% over the period — a 15-point drop. The total population moved almost as fast, falling from 62% to 49%, a 13-point drop over the same period. Gen Z didn't just adopt social commerce first; they normalized it, and now the rest of America is catching up at nearly the same pace. Social purchasing is graduating from a generational quirk to a cross-generational norm.

One finding that cuts against the digital-native stereotype is worth noting: the share of Gen Z who enjoy the experience of shopping in stores rose from 72% to 79%, slightly outpacing the total population's shift from 68% to 73%. Some of this could be reflective of a population that was emerging from a pandemic and shifting from a social-distancing lifestyle. Regardless, Gen Z is embracing both digital and physical retail and doing both more enthusiastically than older cohorts.

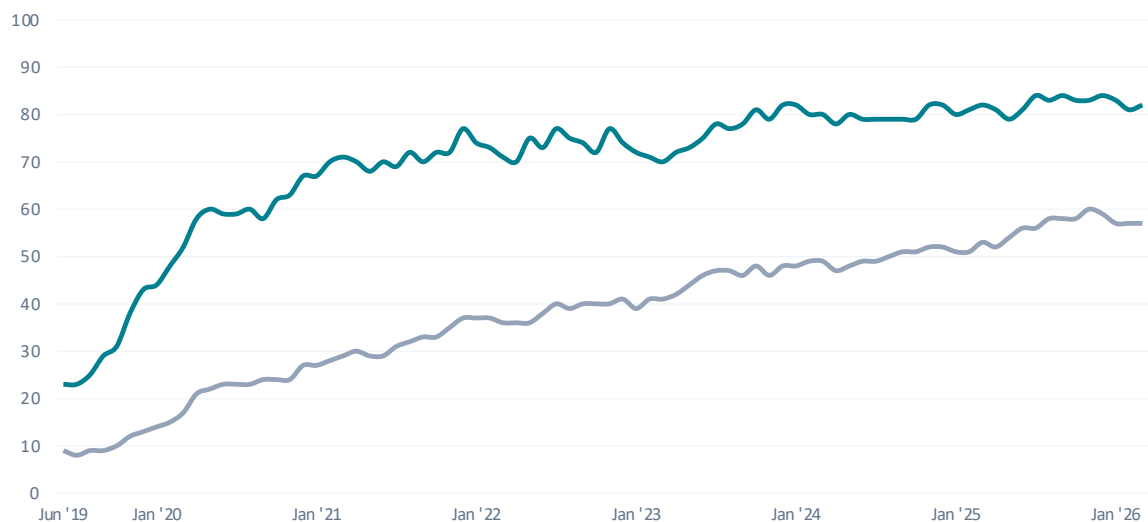
Share of Gen Zers who do not make purchases through social media vs. all respondents



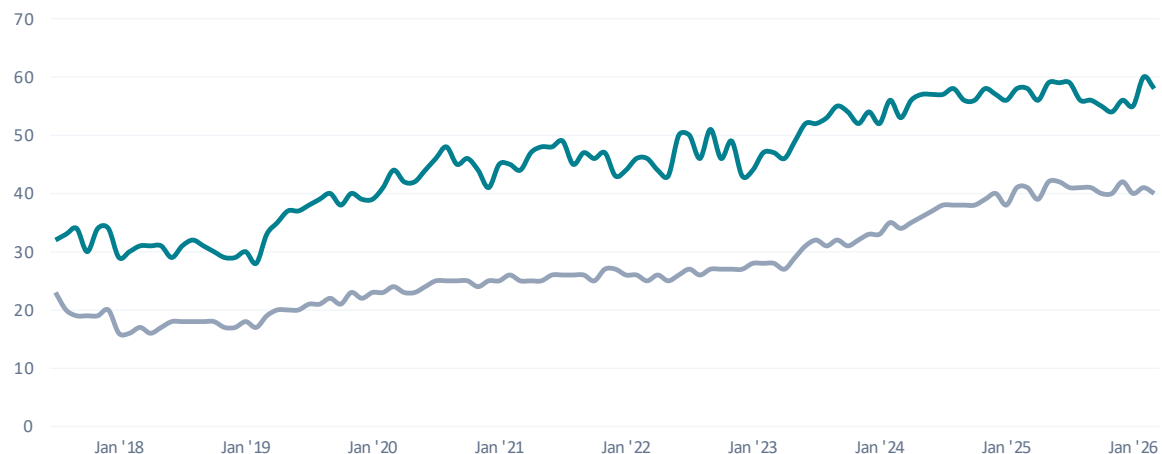
Gen Z continues to be hyper-online

Gen Z's own TikTok usage rose substantially from 2021-2022 to 2025-2026 while the total population's usage nearly doubled over the same period. Despite Gen Z's strong adoption, their over-index vs. the total population fell from +38pp to +26pp. TikTok is no longer a Gen Z platform; it is a mass platform that Gen Z pioneered and still leads, but one where the rest of America is closing the gap faster than Gen Z is growing. Gen Z's Reddit usage rose from 46% to 57% (+11pp), a strong jump — but the total population grew even faster, from 26% to 41% (+15pp), narrowing the over-index from +20pp in 2021 to +16pp today.

Gen Z's TikTok usage (%)



Gen Z's Reddit usage (%)



Gen Z's streaming usage became more diverse

Netflix and Hulu usage has held essentially flat for Gen Z, a sign of entrenched loyalty. But on top of that stable base, Gen Z has dramatically expanded its streaming footprint. Peacock jumped from 28% to 49% (+21pp), Apple TV+ from 23% to 35% (+12pp), and Roku from 48% to 60% (+12pp). Disney+ ticked up from 60% to 63%. The average Gen Z streamer in 2025-26 is actively using significantly more platforms than four years ago.

Gen Z's streaming portfolio



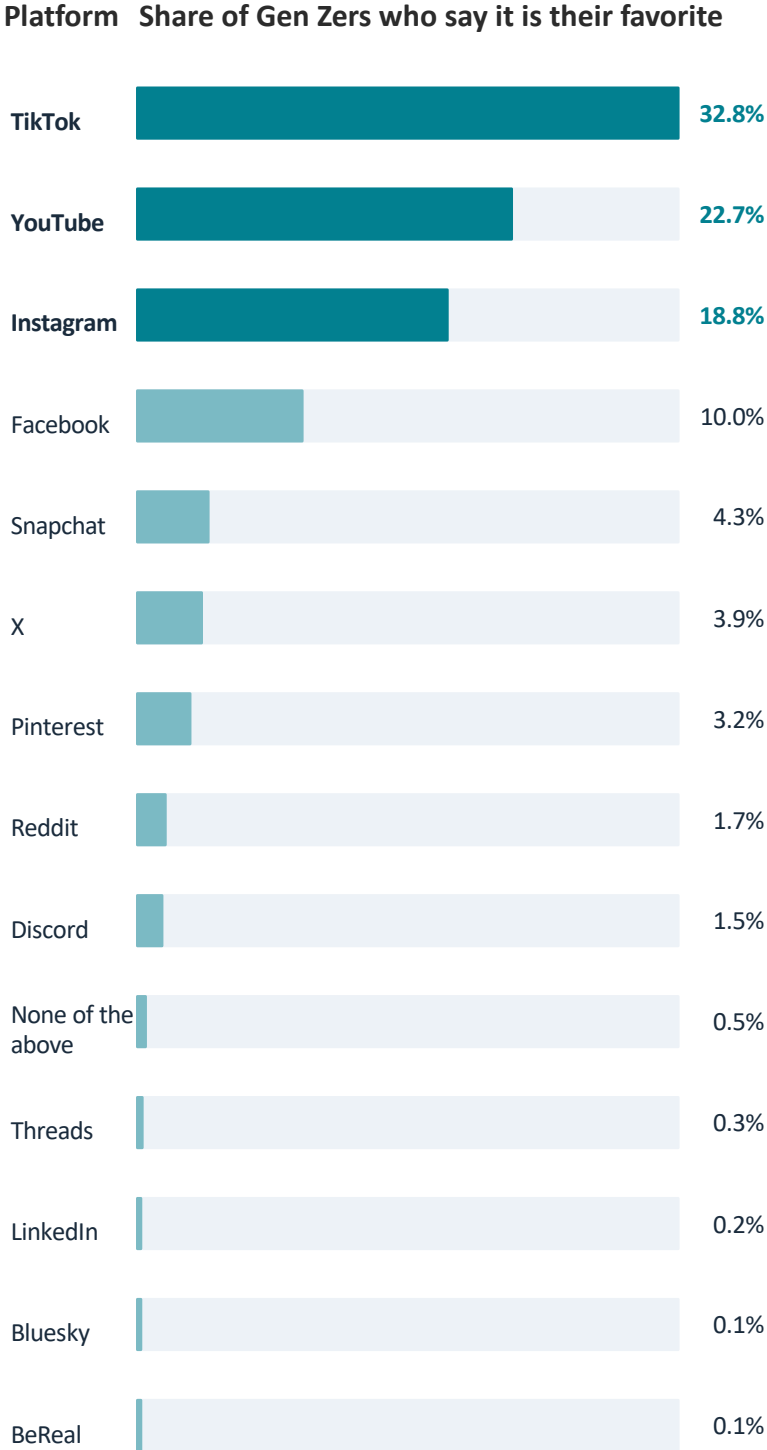
TikTok remains Gen Z's favorite social platform

TikTok's lead is commanding — at 32.8%, making it nearly 10 points ahead of YouTube (22.7%) and almost double Instagram (18.8%).

The top 3 listed here account for ~74% of Gen Z's "favorite" selections combined.

Facebook at 10% is a notable outlier — high for a platform most people would assume Gen Z has abandoned, and higher than Snapchat, X, and Pinterest combined.

Everything below Snapchat (#5) is essentially noise. Newcomers Threads and Bluesky are hardly given serious consideration.

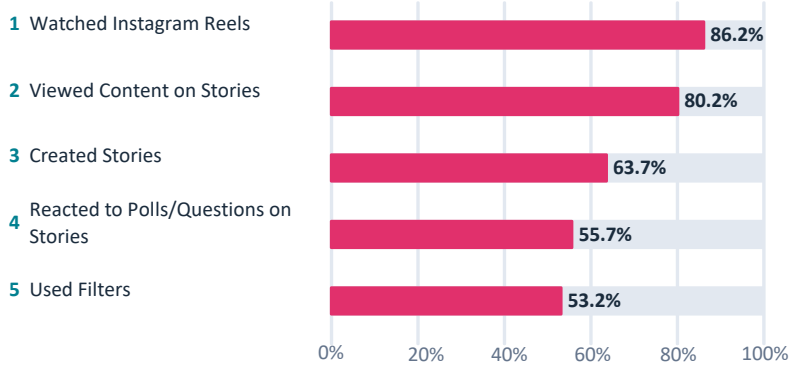


And video is king for Gen Z, no matter what platform they are on

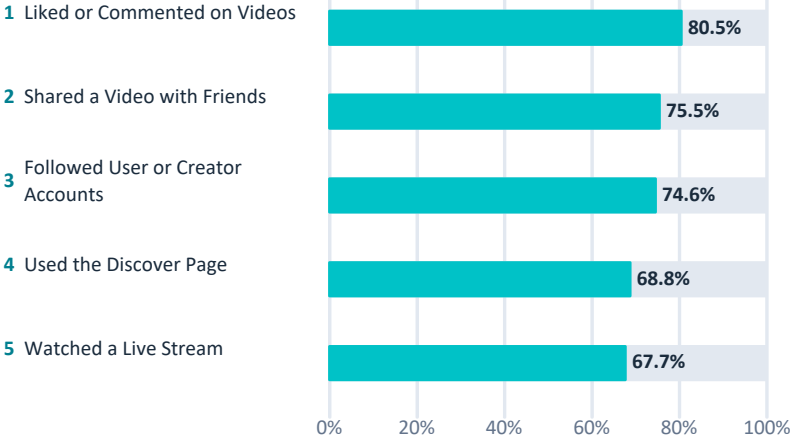
Video consumption dominates Gen Z's social media behavior across every platform. Even on Reddit, traditionally a text-first platform, watching videos ranks #1 at 73.7% — a striking signal of how thoroughly video has reshaped Gen Z's expectations of every social platform.

Engagement and discovery behaviors are also high, but creation lags behind consumption. Across all three platforms, passive or reactive activities — viewing, reacting, following, upvoting — consistently outrank content creation.

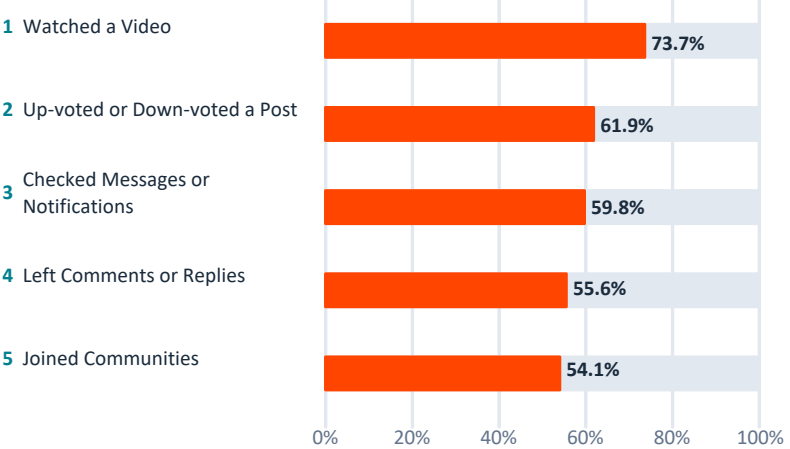
Gen Z's Instagram activities (share of Gen Zers on Instagram who partake in the following...)



Gen Z's TikTok activities (share of Gen Zers on TikTok who partake in the following...)



Gen Z's Reddit activities (share of Gen Zers on Reddit who partake in the following...)



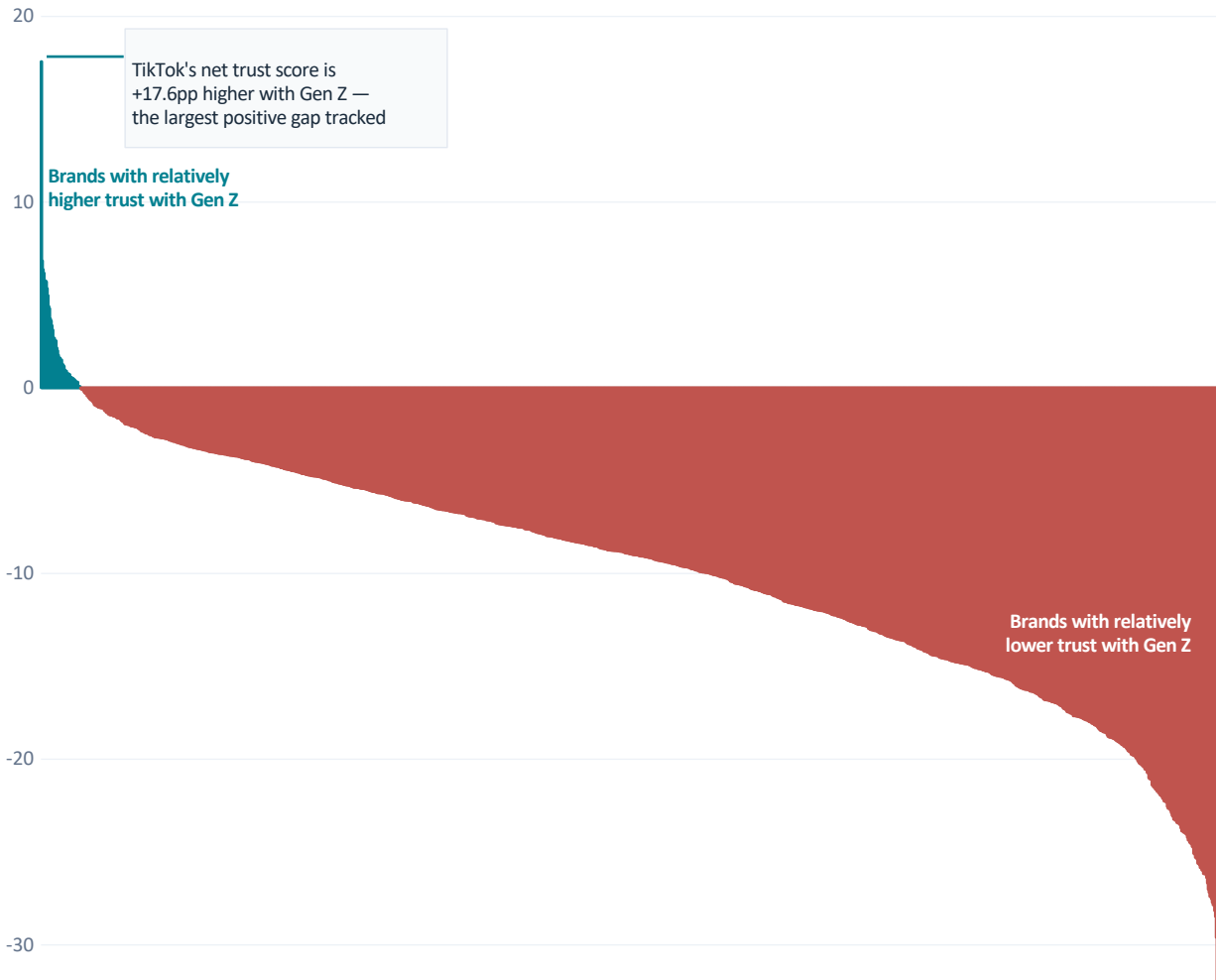
The brands that have won the most trust with Gen Z compared to the general population

Brand	Gen Z change (pp)	All adults change (pp)	Difference
Dyson	+10.62	+2.34	+8.28
Diet Pepsi	+10.72	+3.6	+7.12
Aquaphor	+13.7	+6.76	+6.94
Land O'Lakes	+6.26	+0.06	+6.2
New Balance	+10.95	+4.94	+6.01
Cooper Tire	+3.19	-2.54	+5.73
Centrum	+7.21	+1.59	+5.62
Bounty	+2.48	-3.06	+5.54
Philips	+5.06	-0.45	+5.51
Oscar Mayer	+5.95	+0.45	+5.5
Pepsi Zero Sugar	+11.19	+5.73	+5.46
Courtyard	+5.01	-0.16	+5.17
Moen	+4.32	-0.8	+5.12
Bayer	+1.9	-3.2	+5.1
BISSELL	+2.41	-2.67	+5.08
Anheuser-Busch	+2.57	-2.42	+4.99
Volvo Construction	+5.92	+1.15	+4.77
Stanley Black & Decker	+2.86	-1.79	+4.65
PGA Tour	+6.3	+1.7	+4.6
Scotts Miracle-Gro	+2.06	-2.53	+4.59

Brands across the board have a trust problem with Gen Z...still

Out of the 1,465 brands used for the brand ranking in this report, 97% of them have a lower net trust rating with Gen Z compared to the general population. That’s an even grimmer outlook since we last looked at this trend in 2024 when 95% of brands had lower trust scores. Skepticism is seemingly engrained in this generation, and it’s a challenge that brands may face still for years to come. Even TikTok saw its advantage with Gen Z fall by a few points.

97% of brands have lower trust ratings with Gen Z than with all adults



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