

UNDERSTANDING

# THE Z



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How America's largest,  
most diverse, best-educated,  
and most financially-powerful  
generation will shape  
the future.



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# INTRODUCTION

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A superlative generation in many regards, Gen Z is on track to be the largest, most ethnically-diverse, best-educated, and most financially-powerful generation ever. In the coming years, their distinctive habits will play an outsized role in shaping American culture and commerce.

Gen Z is composed of those Americans born between 1997 and 2012. Research on this generation is still in its nascent stage, and many of the conceptions about Gen Z are premised on a shaky foundation of speculation and conjecture.

In this report, we employ Morning Consult's survey research technology to let Gen Z adults speak for themselves. Based on nearly 1,000 survey interviews with 18-21 year-olds, this report will dig into their values, habits, aspirations, politics, and concerns, offering a detailed overview of the ideas that are shaping Gen Z adults, and the ways they differ from the generations that came before them.

## HOW WE CONDUCTED THIS REPORT

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This report is primarily based on a survey of 3,022 U.S. adults, including an oversample of 999 adults aged 18-21. The survey was conducted May 23-26, 2019. The margin of error for Gen Z adults is +/- 3 percentage points, and the margin of error for Gen Z adult sub-demographics range from 4 - 8 percentage points. The "all older adults" demographic - all Americans 22 or older - has a margin of error of +/- 2 percentage points.

The interviews were conducted online and the data were weighted to approximate a target sample of adults based on age, race/ethnicity, gender, educational attainment, and region.

Additional brand-tracking data in this report comes from Morning Consult Brand Intelligence. Brand Intelligence is the most comprehensive brand tracking platform available, using thousands of daily surveys on over 3,000+ brands to help marketing and communications executives measure brand reputation in real-time. Date ranges and sample sizes for Brand Intelligence data vary and are specified on pages where this data appears.



**Making money and having a successful career are the two most universally important life goals for Gen Z adults – more than pursuing friends, family, or hobbies.**

They are also notably more likely than older generations to value doing what it takes to get ahead in life.



**A predominantly liberal group, civil rights and social justice issues are at the forefront for Gen Z adults.**

Discrimination is seen as the third most critical threat facing the U.S., and civil rights is the second most important political issue. This filters into how they view politics, interact with brands, and approach personal life decisions.



**When it comes to how they view themselves, Gen Z adults are largely similar to older generations.**

But where they differ has a clear trend - Gen Z adults are more likely to value individualistic traits and view their personal identity in terms of what they do, rather than who they are.



## SEVEN IMPORTANT TRENDS

- 1** Reversing a trend of declining generational trust, **Gen Z adults put slightly more faith in capitalism than millennials**. Gen Z adults also have the most positive view of socialism of any generation.
- 2** Collectively, Google and Apple's suite of products make up 11 out of the top 25 brands that Gen Z adults are **most likely to use on a daily basis**.
- 3** Gen Z is **widely distrustful of institutions and powerful interests**, from Wall Street to the news media. Seventy-eight percent say there is a lot of corruption in America.
- 4** Gen Z **liberals are more likely to boycott** a brand for political reasons: 39 percent say they've done so in the past year.
- 5** The first digitally native generation has a **starkly different media diet**. A 49 percent plurality get their news from social media, and a majority are on YouTube daily.
- 6** Gen Z Republicans are far **more comfortable with "large government"** and socialism than elder Republicans. They also hold more socially liberal views.
- 7** Gen Z adults are **far less America-centric** than older adults. They are less likely to say that being an American is important to their identity, and more skeptical that the U.S. sets a good example for the rest of the world.



## 35 MILLION

The initial iPod tagline, “1,000 songs in your pocket” is so quaint 17 years later. Gen Z is accustomed to immediate access to seemingly **unlimited information and entertainment**, including more than 35 million songs in the Spotify library.

## 58

Since 2005, 58 Major League Baseball players have been suspended for using steroids. **Wide-ranging institutional scandals** – from the MLB to the Catholic Church to the police – have shaped the national dialogue and bred skepticism about systems of power.

## 1.2 MILLION

There are more than 1 million sub-Reddits, each centered around a specific topic. The first post-internet generation has grown up in these **global online communities**, allowing for new opportunities to pursue niche interests and altering perceptions of boundary and place.

## 2

Two-day delivery and other seamless online shopping experiences have become commonplace in the years since Gen Z first began spending serious money, driving **high expectations about convenience**.

## 17

Gen Z has come-of-age only knowing an **America at war**, as engagement in Afghanistan stretches into its 17th year. The youngest soldiers currently deployed weren’t alive for 9/11.

## 184 MILLION

Whether searching for a new restaurant or a smartphone case, crowd-sourced reviews have **revolutionized purchasing consideration**. Yelp alone has generated over 184 million online reviews.

## 24

Senseless, **intermittent terror** has dotted the 21st century landscape. Along with numerous other attacks at home and abroad, there were 24 school shootings that resulted in deaths in 2018.

## 39%

The top 1% of income earners now control 39% of U.S. wealth. A devastating economic collapse in 2008 followed by a slow and, for many, inadequate recovery has engendered **financial conservatism and concerns about inequality** in young Americans.

## \$4.2 TRILLION

Gen Z is entering adulthood as a new consumer ethos is spreading, centered around **individual value and self care**. The wellness industry is valued at over 4 trillion dollars, as of 2018.

## 7%

Young Americans have only experienced a **political system that is bursting at the seams**, incapable of solving basic problems or driving a national purpose. Just seven percent of Americans said they trusted Congress “a lot” in December.





# INTELLIGENT DATA INTELLIGENT DECISIONS


## BRAND INTELLIGENCE

Nearly 5 million survey  
research interviews on  
3,500+ brands across a  
dozen countries.


Morning Consult is revolutionizing the ways to collect, organize, and share survey research data to transform how decisions are made. Our flagship product, Brand Intelligence, is the most comprehensive brand-management platform available today, giving users unprecedented insight and tools into what consumers think, see, and say about thousands of brands and products.

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# PERSONAL VALUES + LIFE OUTLOOK



More individualistic than  
previous generations, Gen Z  
adults are highly motivated and  
driven by financial interest.

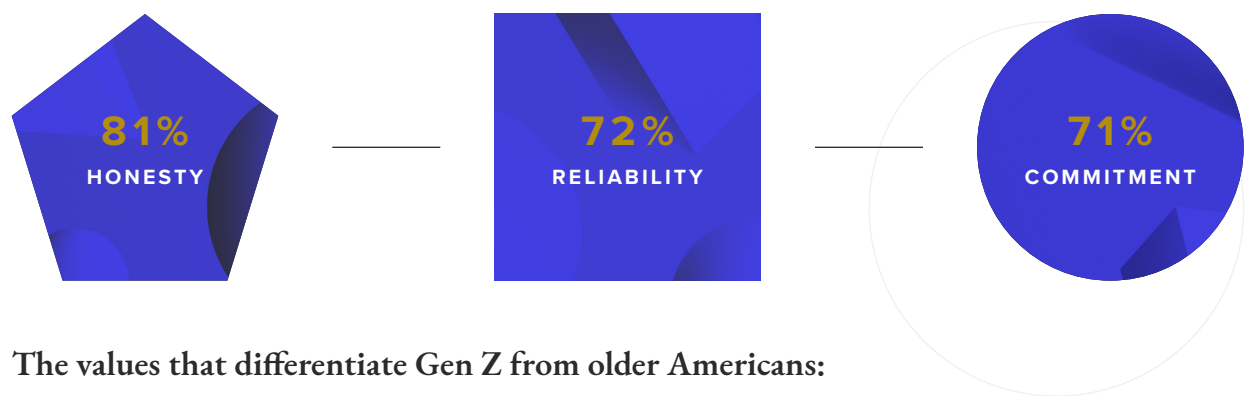




By and large, Gen Z adults hold similar values to older Americans, placing a premium on honesty, reliability, and commitment. However, the places where Gen Z adults differ from older generations has a clear trend: they are more likely to put stock in individualistic values and less likely to say hierarchical values are important.

### The three most important personal values to Gen Z adults:

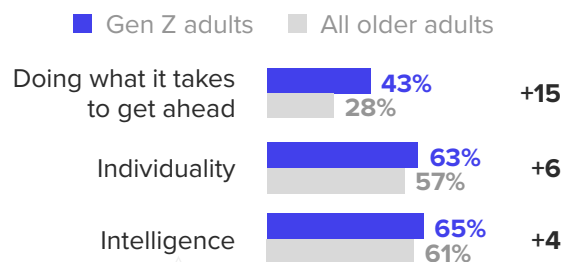
The share who say each value is very important to their personal identity



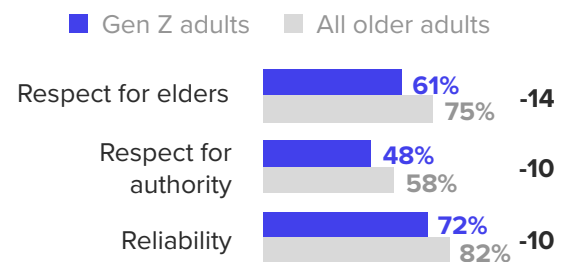
### The values that differentiate Gen Z from older Americans:

Measured by the share who say each value is very important to their identity

#### VALUES GEN Z CARES ABOUT MORE THAN OLDER ADULTS:



#### VALUES GEN Z CARES ABOUT LESS THAN OLDER ADULTS:



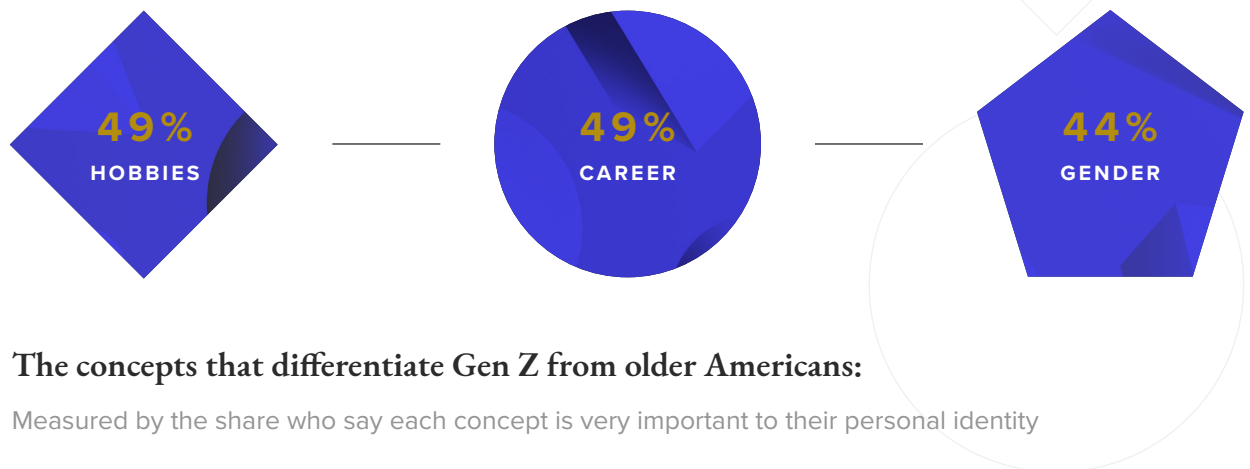
Other values tested, with the share of Gen Z adults who say each is very important: Compassion (70%), open-mindedness (67%), rational thinking (61%), authenticity (60%), care for those more needy than yourself (56%), transparency (41%), spirituality (39%).



When considering what shapes their personal identity, Gen Z adults are more likely than average Americans to name concepts tied to what they do, rather than who they are.

### The three concepts most important to personal identity for Gen Z adults:

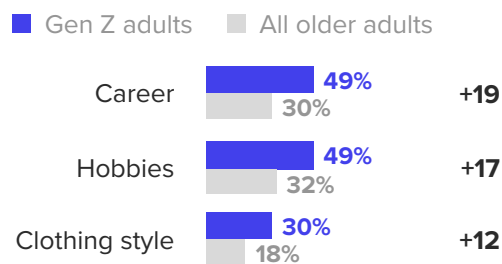
The share who say each concept is “very important” to their personal identity



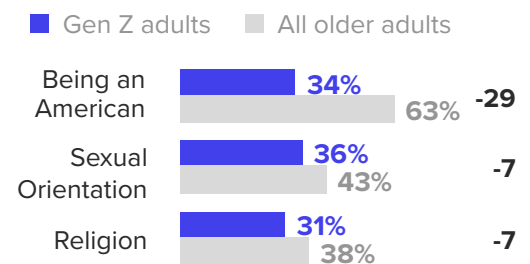
### The concepts that differentiate Gen Z from older Americans:

Measured by the share who say each concept is very important to their personal identity

#### CONCEPTS GEN Z CARES ABOUT MORE THAN OLDER ADULTS:



#### CONCEPTS GEN Z CARES ABOUT LESS THAN OLDER ADULTS:

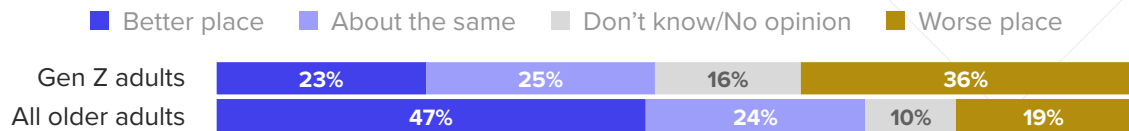


Other concepts tested, with share of Gen Z adults who say each is very important:  
Sexual orientation (36%), family history (36%), race (34%), hometown (27%), college (19%), politics (18%), social class (17%), high school (15%).



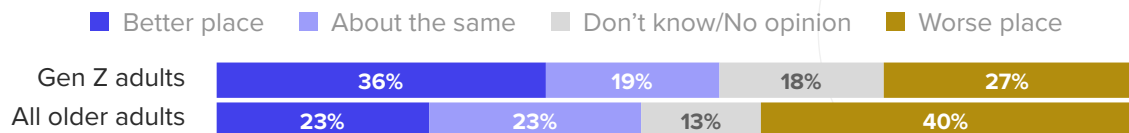
## Less than a quarter of Gen Z adults think older generations have made the world a better place...

Do you think older generations of Americans have made the world a better place?



## ...But more are optimistic that younger generations will be able to.

Do you think younger generations will make the world a better place?

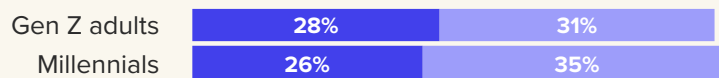


## Like millennials, Gen Z adults are more optimistic about their personal futures than the future of the world.

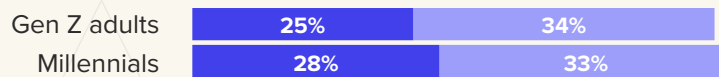
How optimistic are you about each of the following?

■ Very optimistic ■ Somewhat optimistic

### THE FUTURE OF THE WORLD



### THE FUTURE OF THE U.S.



### THE FUTURE OF YOUR PERSONAL WELLBEING



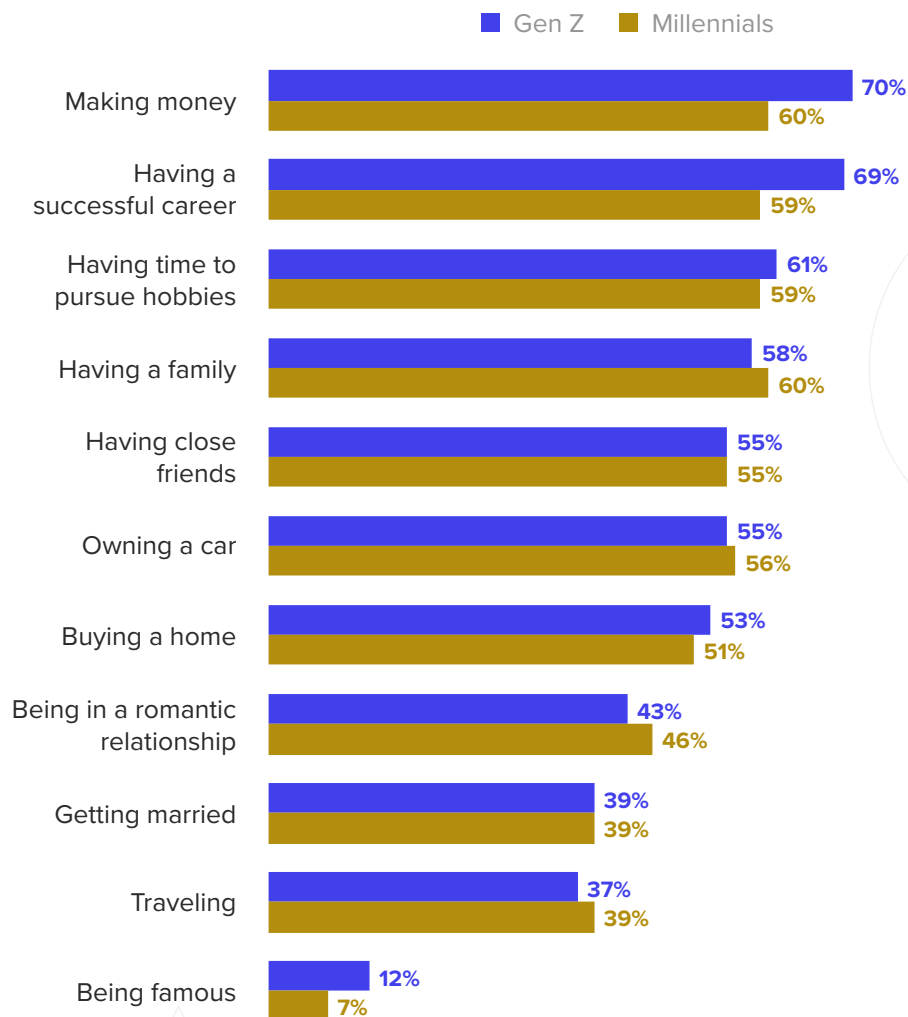
### THE FUTURE OF PERSONAL FINANCES





**Largely similar to millennials in terms of life goals, more members of Gen Z adults are motivated to make money and have successful careers.**

The share who say each of the following are “very important” to them:



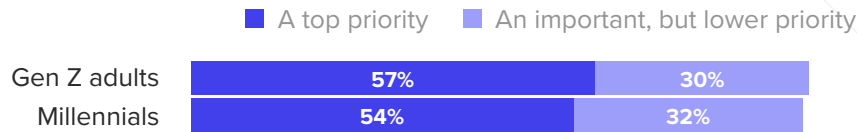
#### A QUARTER OF GEN Z ADULTS HAVE ASPIRATIONS TO BE FAMOUS

Maybe it's just the optimism of youth, or maybe it's a reflection of the growing prevalence of “influencer” culture. Either way, 23 percent of Gen Z adults say being famous is important to them - eight points higher than millennials and 15 points higher than Gen X.



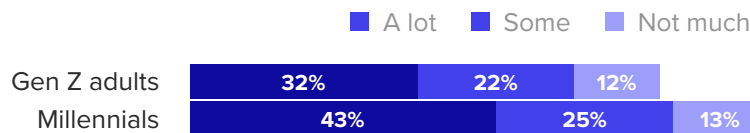
## Gen Z adults and millennials both view saving money as a top priority:

To what extent is saving money a priority for you?



## So far, Gen Z adults are less concerned about financial debt:

Thinking generally, how concerned are you about your financial debt?



### HITTING MAJOR FAMILY MILESTONES

#### Two thirds of Gen Z adults plan on getting married by age 30...

- Another 9% plan on getting married later in life
- 3% are already married
- 10% don't plan on getting married

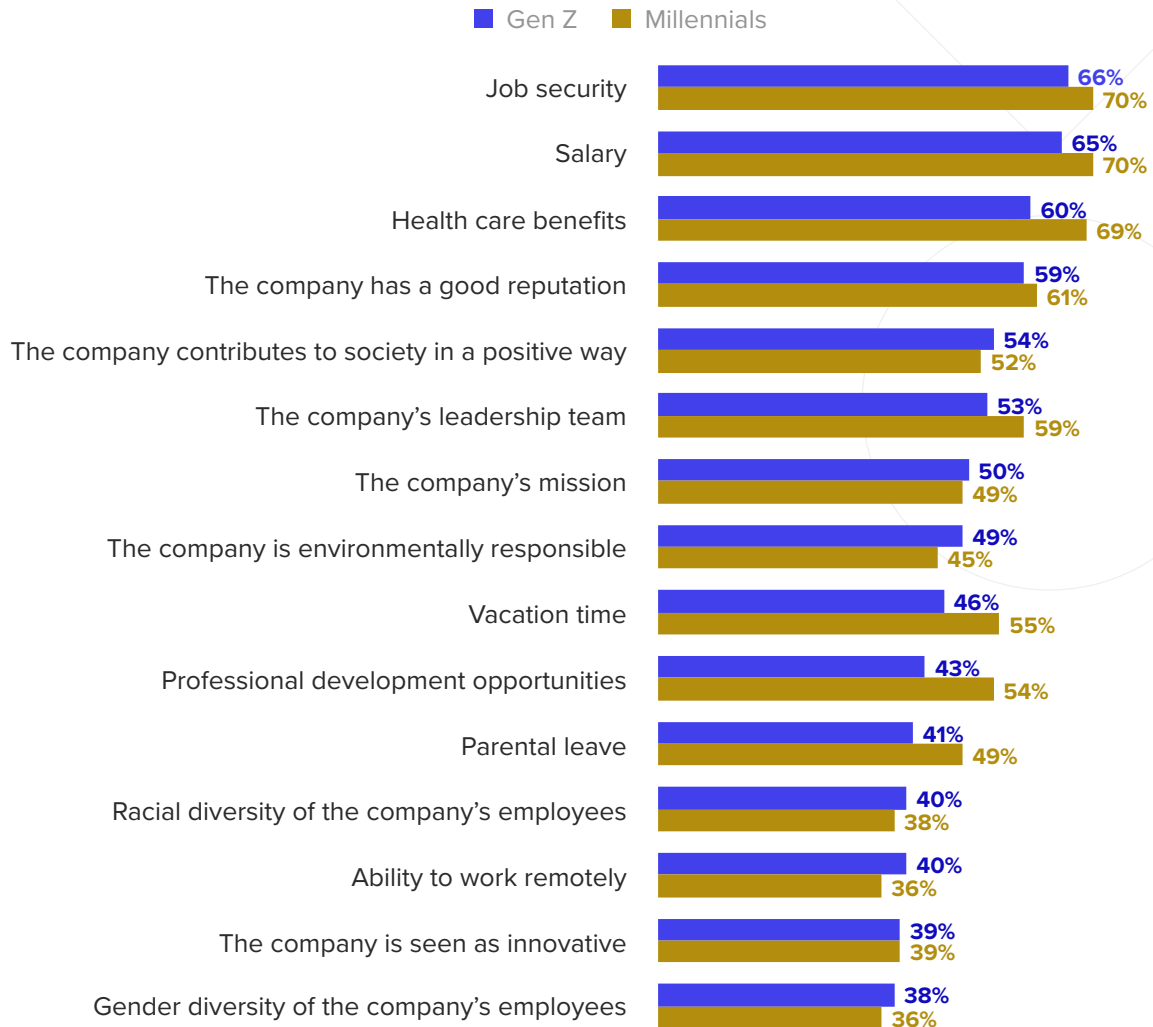
#### ...and half plan on having children by that age

- Another 15% plan on having children later in life
- 8% already have children
- 16% say they do not plan on having children.



## Job security and salary are the most important employment factors for Gen Z adults

The share who say each factor is very important when considering working for a company.



### WHERE GEN Z ADULTS AND MILLENNIALS DIFFER:

On average, millennials are 6 points more likely than Gen Z adults to say factors relating to personal benefit, such as salary, are very important. When it comes to mission-oriented factors, such as environmental responsibility, Gen Z adults are 2 points more likely to say they are very important.



# POLITICAL IDENTITY AND PERCEPTIONS OF THE WORLD



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Liberal and socially conscious,  
Gen Z adults are skeptical of  
American power and distrusting  
of institutions.





# GEN Z ADULTS ARE POLITICALLY DISENGAGED AND DEEPLY DISTRUSTFUL OF POWER IN AMERICA

Like most Americans, Gen Z is highly skeptical that people in power act responsibly and that important institutions are worthy of trust. More than older generations, Gen Z adults are not paying close attention to politics (a trend that is not atypical for younger Americans).

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**78%** Of Gen Z adults say there is a lot of corruption in America.

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**8%** have a lot of trust that people in power generally do the right thing. Another 34% have some trust.

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**53%** agree that people who work hard and play by the rules generally get ahead in America - 8 points lower than all older adults.

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**44%** say they have strong political opinions, 20 points lower than all older adults.

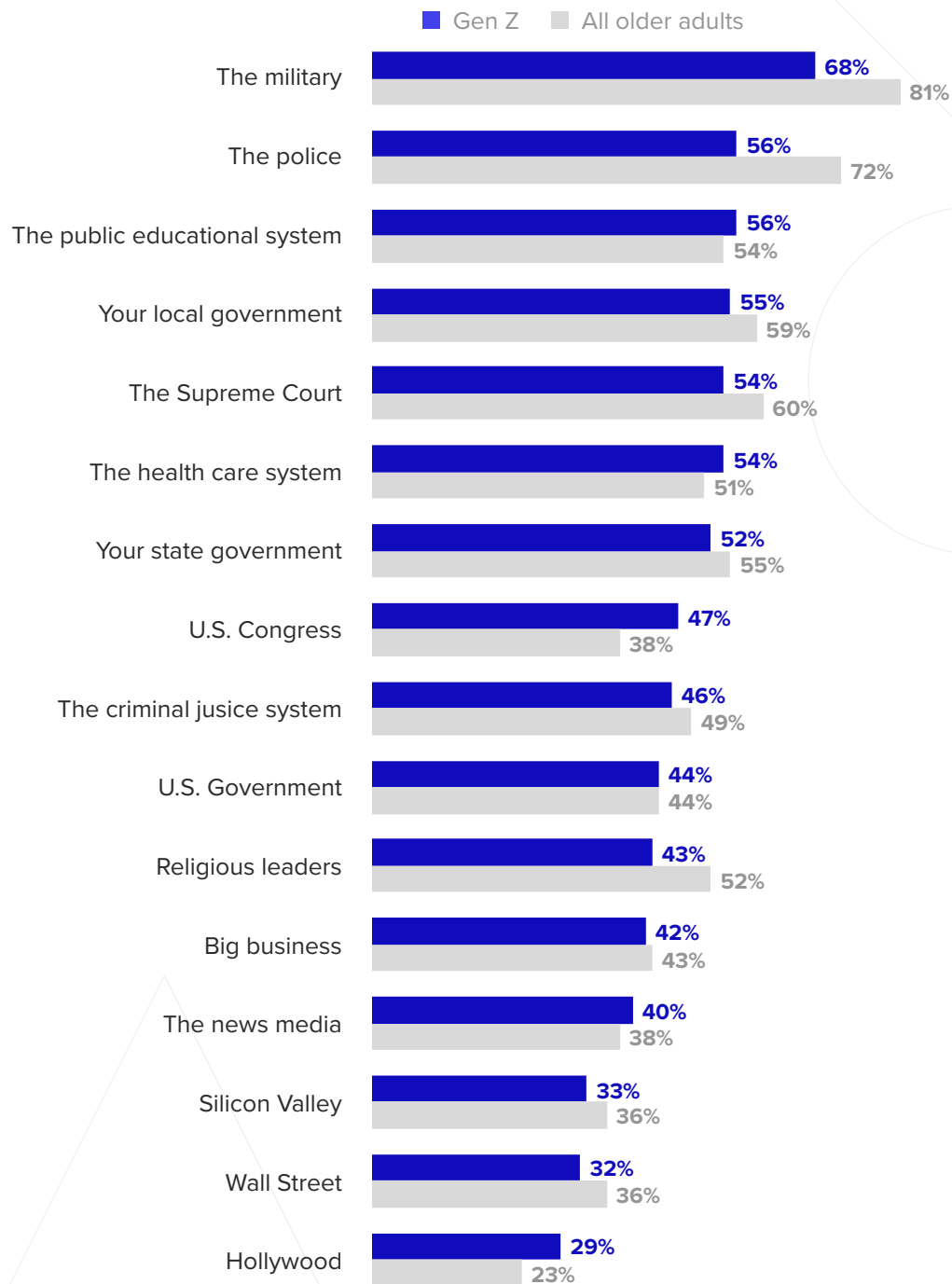
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**8%** say they're paying very close attention to national politics. Another 29% say they pay somewhat close attention.



## Gen Z adults are notably less trusting of the military, police, and religious leaders.

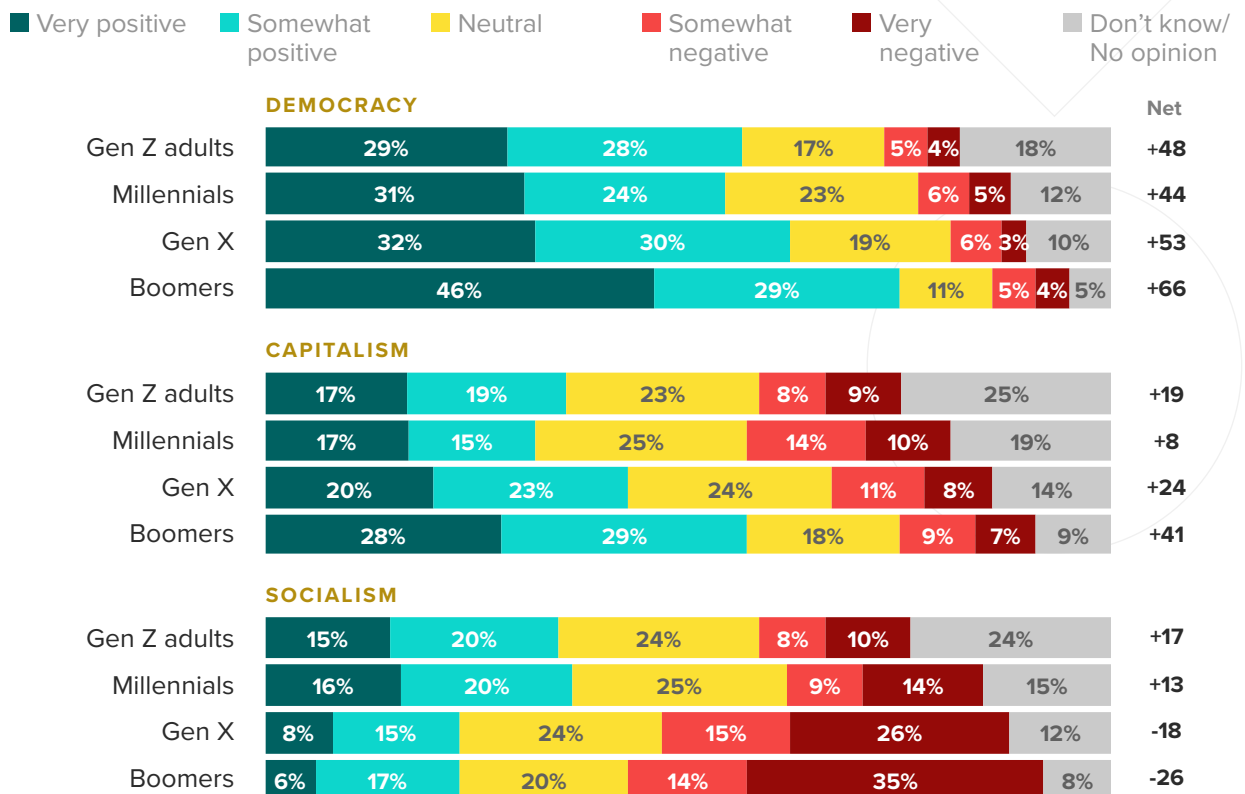
The share who say they trust each of the following either “a lot” or “some.”





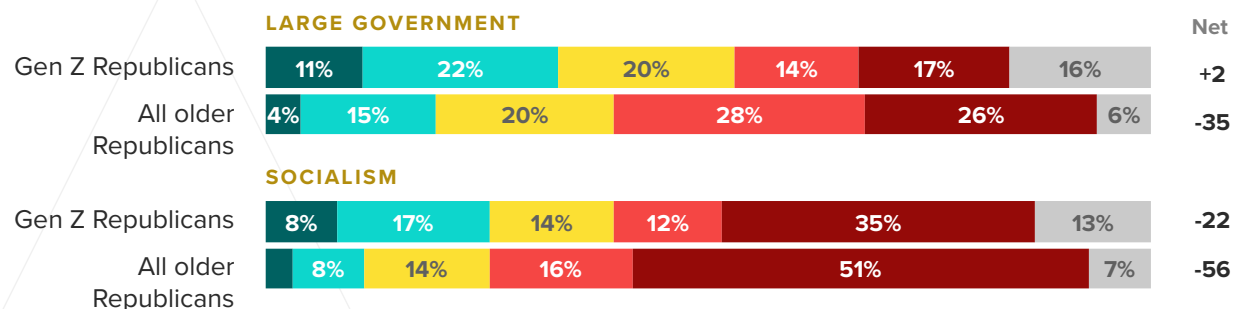
## Gen Z adults have a slightly more favorable view of capitalism than millennials. They have an equally rosy view of socialism.

Please indicate if you have a generally positive or negative view of each of the following.



## Gen Z Republicans are far more comfortable with large government, less concerned about socialism than older Republicans.

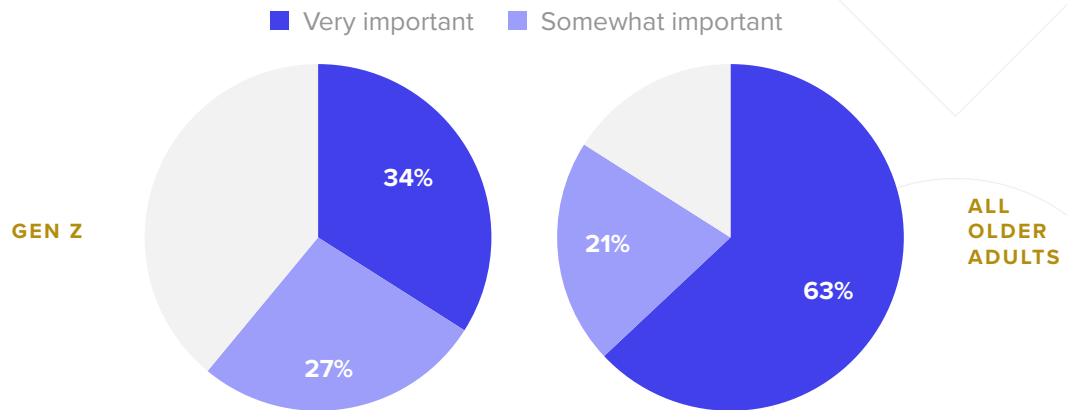
Please indicate if you have a generally positive or negative view of each of the following.





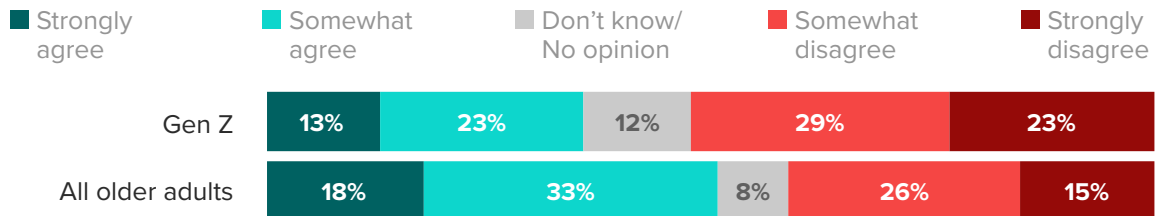
## Gen Z adults are 29 points less likely to say *being an American* is very important to their identity:

How important is the following to your personal identity? Being an American.



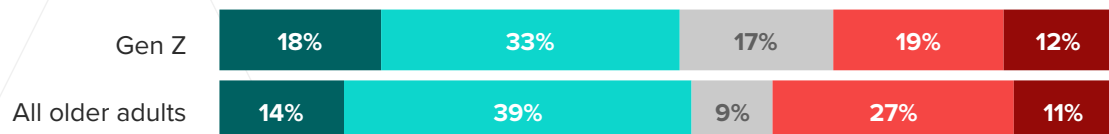
## Gen Z adults are less likely to say that America sets a good example for the world.

Please indicate how much you agree or disagree with each of the following statements: *America sets a good example for the rest of the world to follow.*



## And older generations are more likely to disagree that America has a duty to intervene when there are conflicts abroad.

Please indicate how much you agree or disagree with each of the following statements: *When there are conflicts abroad, America has a duty to try and help.*





## GEN Z ADULTS ARE NOTABLY LESS CONSERVATIVE

For every voting-age member of Gen Z who has a very favorable opinion of Trump, there are more than 6 who have a very unfavorable opinion.

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**15%** of Gen Z adults identify as conservatives, and 36% are liberal.

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**14%** identify as Republicans, and 37% as Democrats.

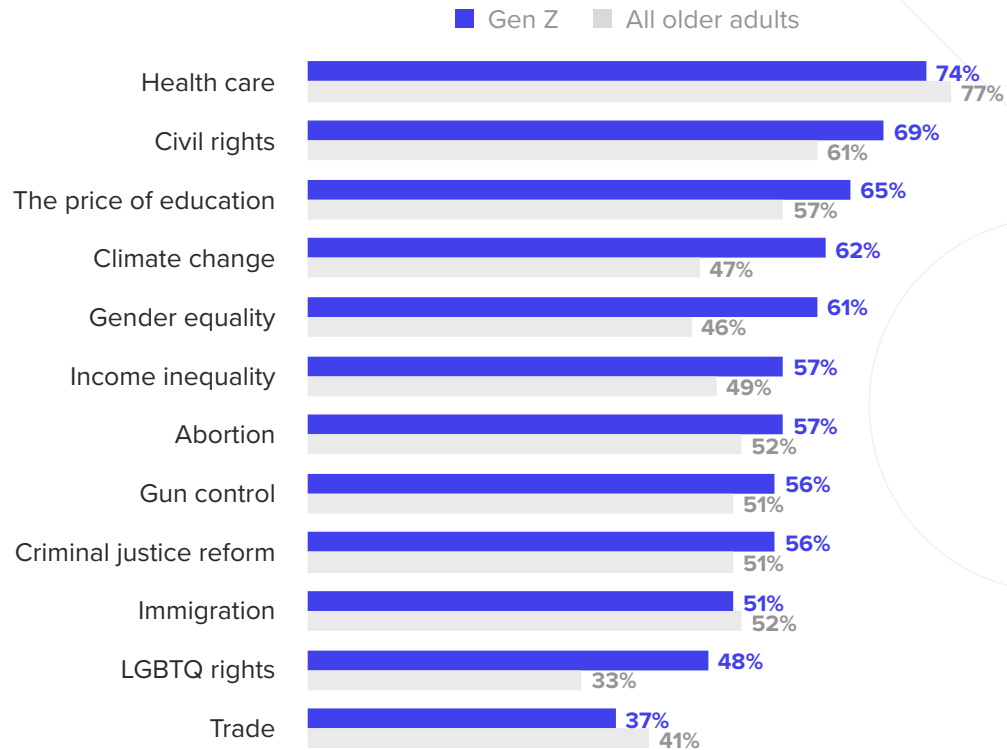
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**20%** have a favorable view of Trump, while 64% have an unfavorable view.



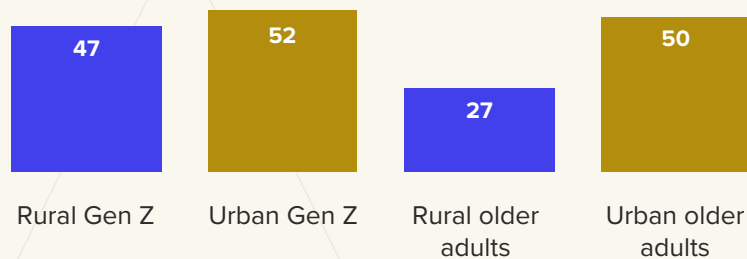
## Health care is the most important political issue to Gen Z adults.

Share who say each of the following political issues are “very important.”



## The urban rural divide is less pronounced on social issues for Gen Z adults.

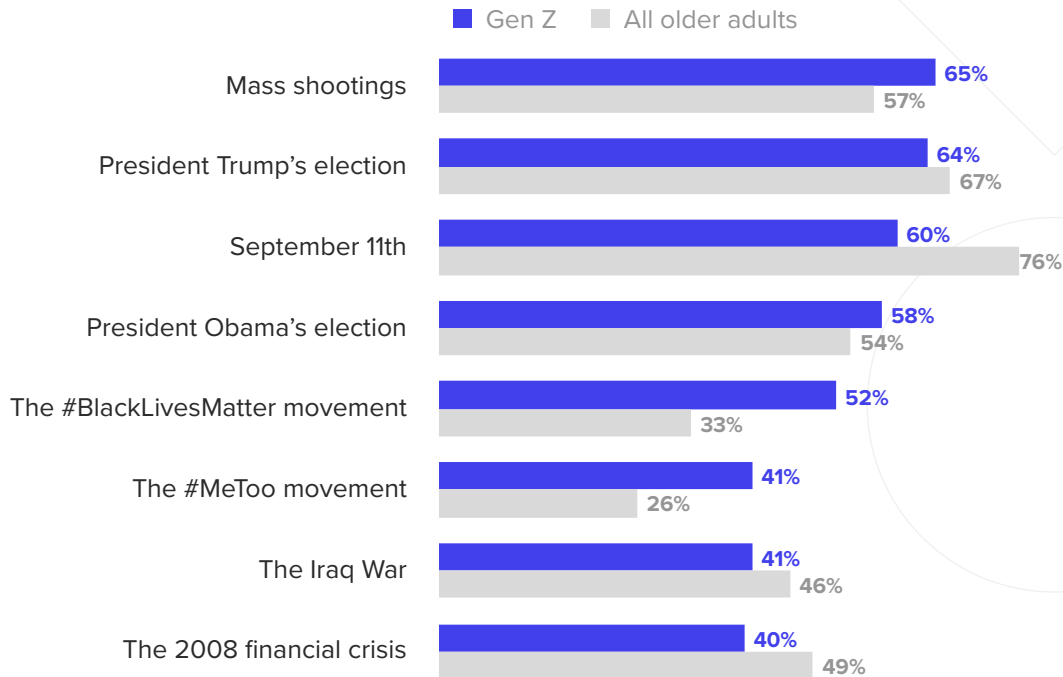
For example, there is a five point difference between urban and rural Gen Z Americans on the **net importance of LGBTQ rights** (those who say it is important minus those who say it is not important at all), and a 23 point difference for older urban and rural Americans:





## How recent events have shaped Gen Z adults' worldview.

The share who say each of the following events has had a major impact on their worldview



### THE POTENCY OF #BLACKLIVESMATTER

As the previous graph illustrates, no recent political event has registered more with Gen Z adults, relative to older generations, than the #BlackLivesMatter movement.

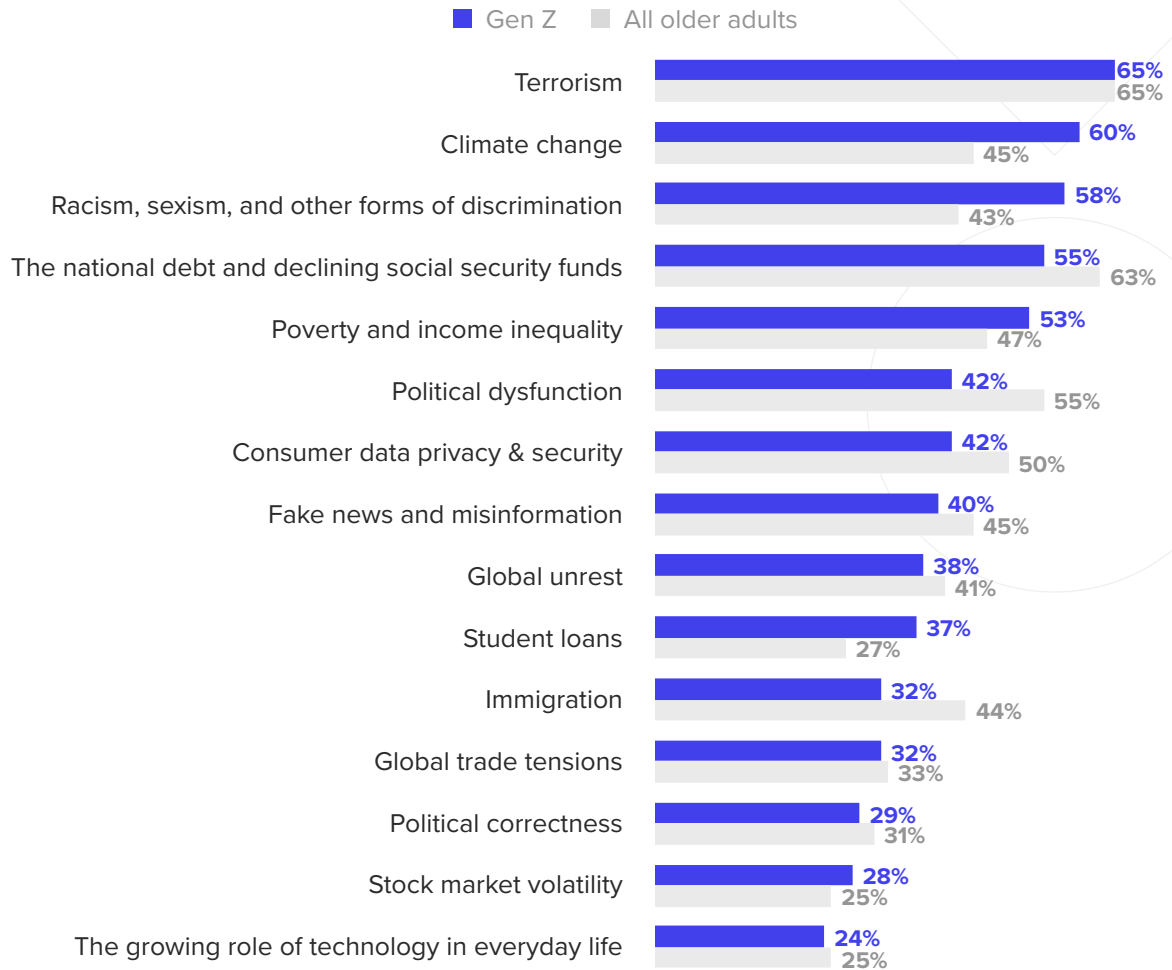
**Fifty-two percent of Gen Z adults say the #BlackLivesMatter movement had a major impact on their worldview, and another 27 percent say it has had a minor impact.** For certain Gen Z adults demographics, it's even higher: 62 percent of women, 64 percent of Democrats, and 64 percent of African-Americans say the movement had a major impact.



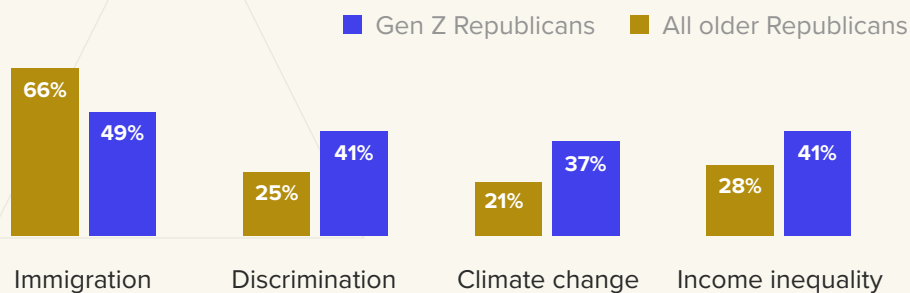


## Gen Z adults see discrimination as one of the three most critical threats facing the U.S.

The share who say each represents a “critical” threat to the United States over the next 10 years




## Gen Z Republicans perceive threats differently from older generations





# MEDIA CONSUMPTION

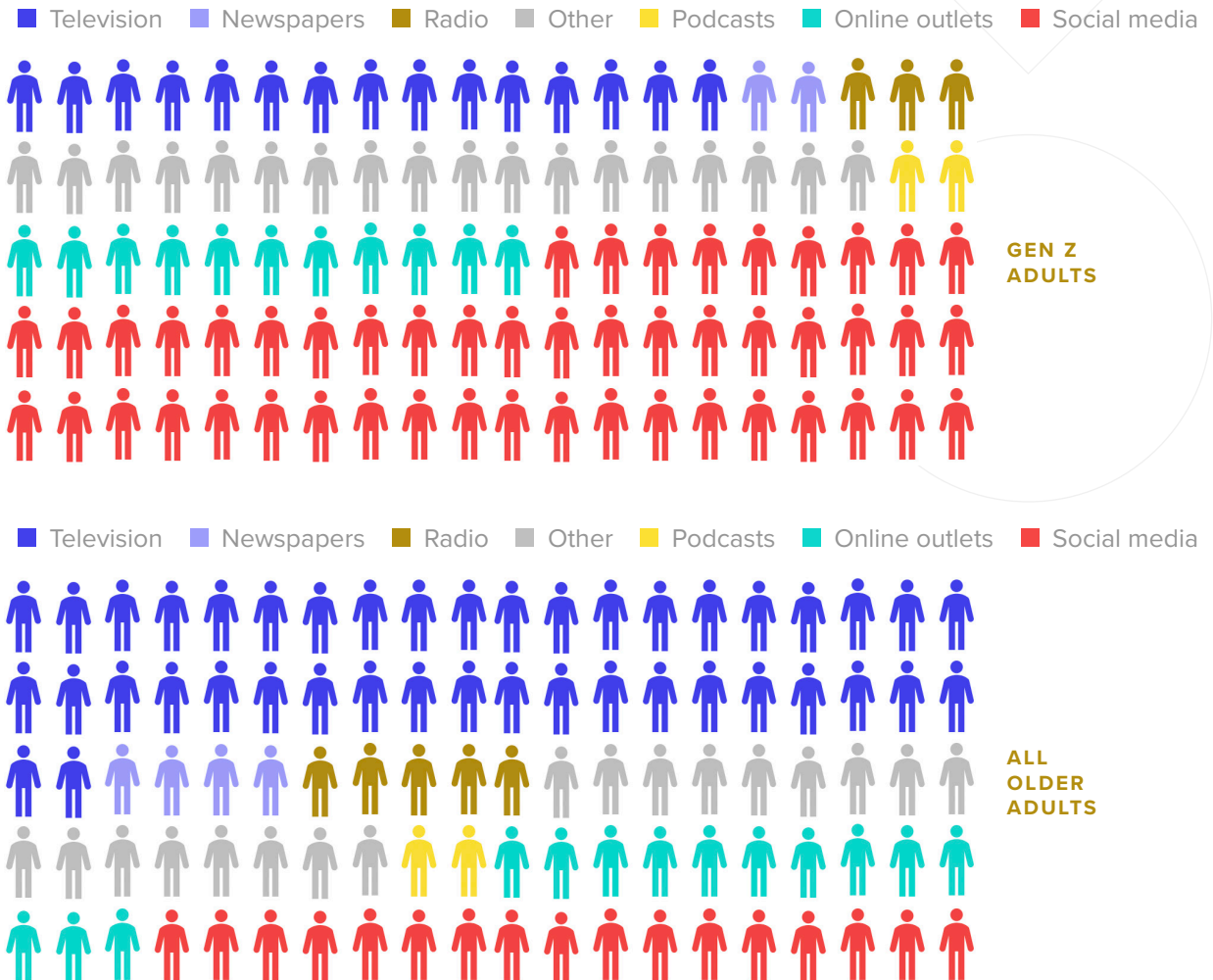


Few areas differentiate the first  
digitally native generation more  
from older Americans than how  
they get their information.



### Gen Z adults have a news diet entirely unlike older Americans.

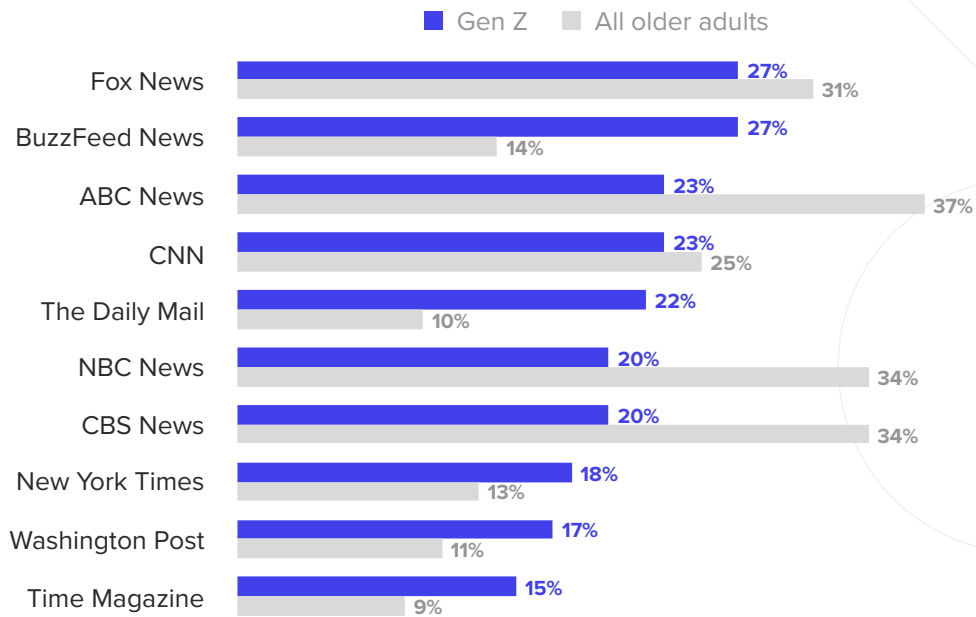
Forty-nine percent of Gen Z adults get most of their news from social media, compared to seventeen percent for all older adults. Twelve percent of Gen Z gets most of their news on television, compared to forty-two percent of all older adults.





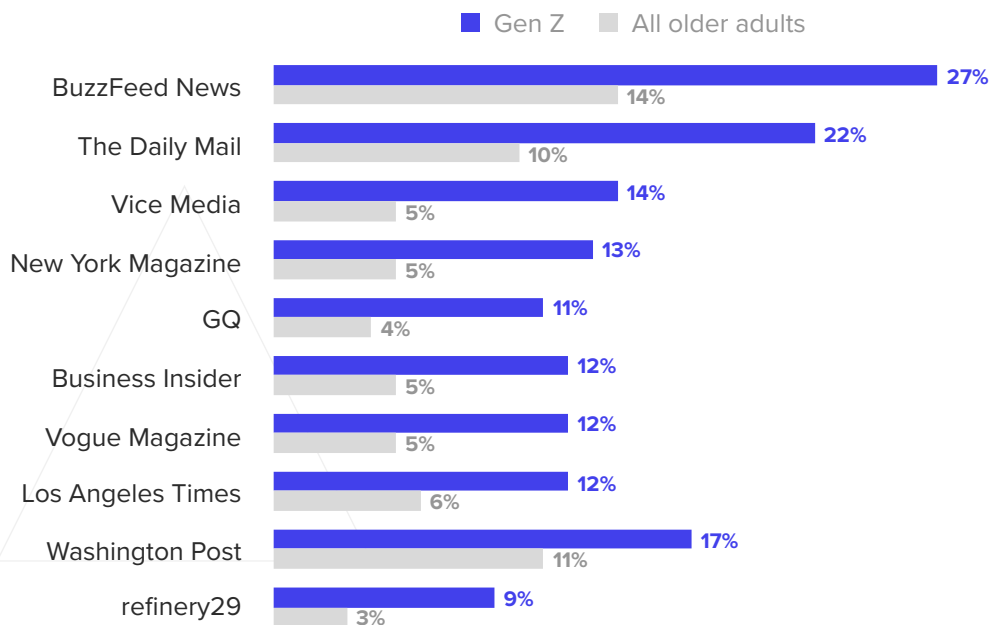
## Gen Z's 10 Most Used News Media Brands

These are the news brands Gen Z adults are most likely to say they use at least once a week. The grey lines represent all adults older than Gen Z.



## Gen Z's Most Differentiated News Sources

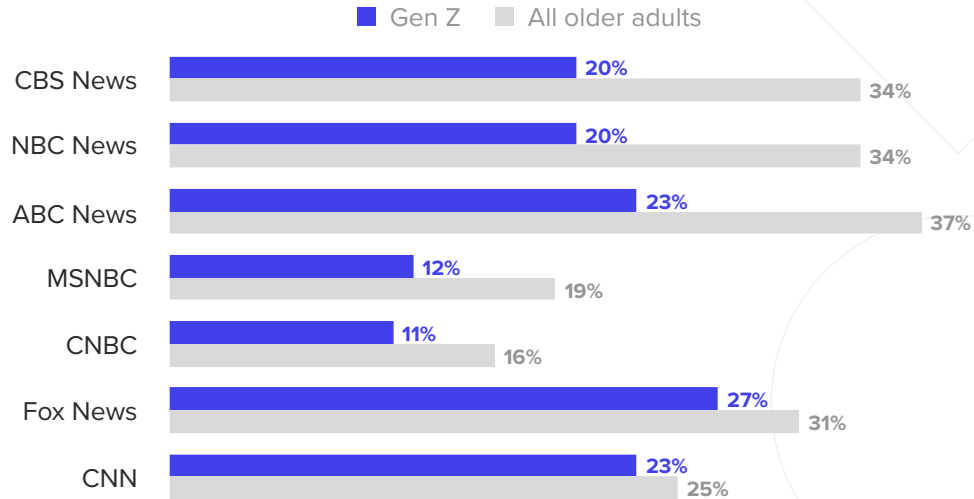
The brands that Gen Z adults are most likely to use weekly, relative to older Americans.





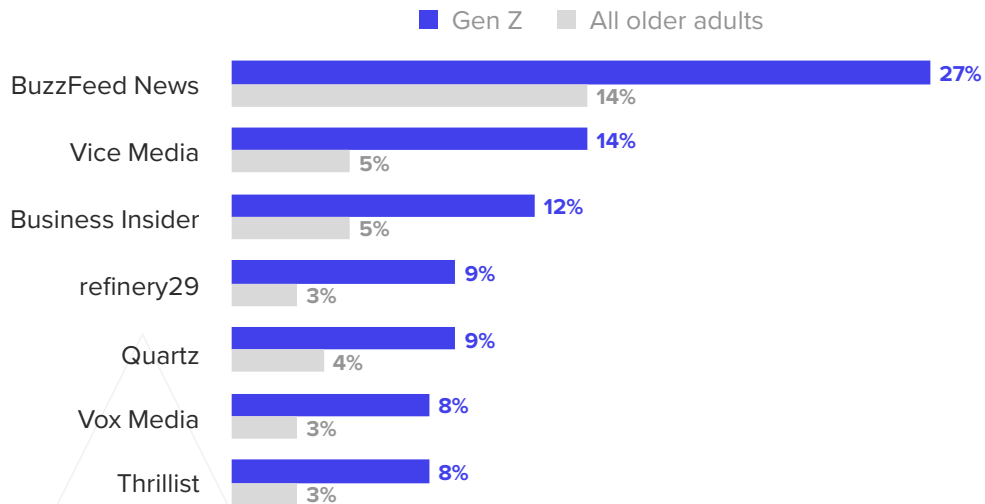
## Gen Z adults are less likely to watch TV news than older generations...

The share who use each platform at least once a week.




## ... and are more likely to use digital-first news publications:

The share who use each platform at least once a week.





# CONSUMER HABITS

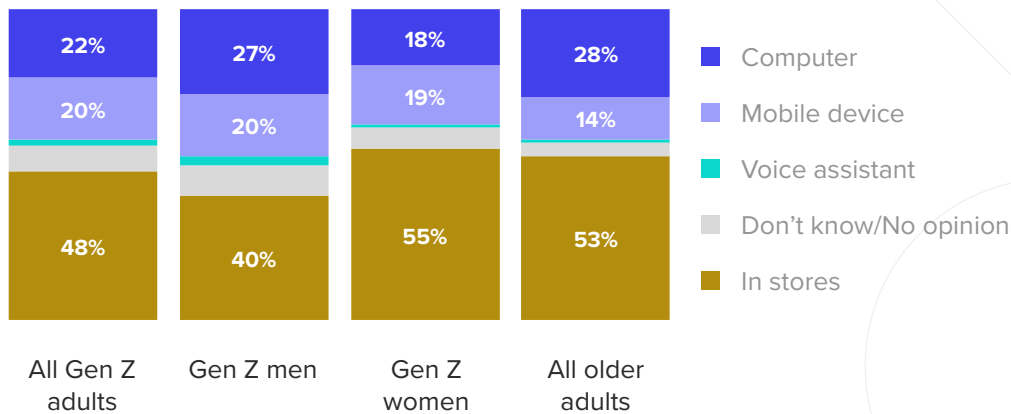


Gen Z adults are enamored with major technology and social media brands but also enjoy shopping in-person.



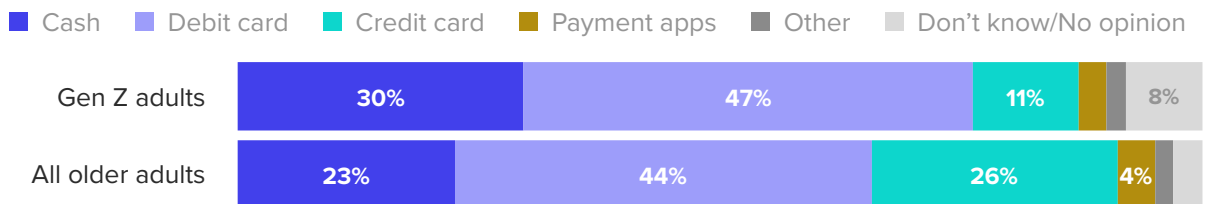
## In-store shopping is still the most popular option for the youngest consumers, particularly women:

Generally, how do you prefer to shop?



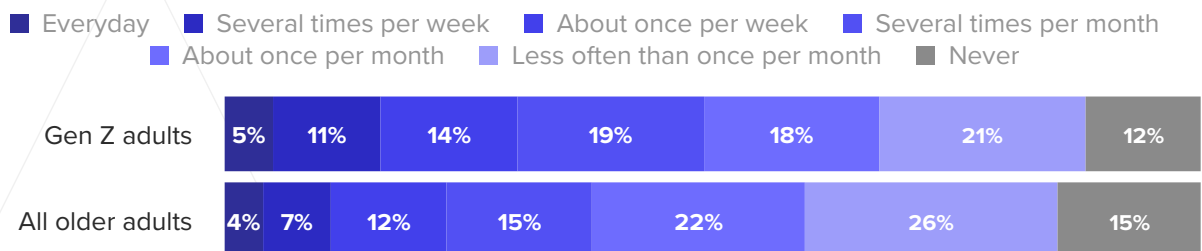
## Few Gen Z adults use credit cards to pay for every day items:

How do you primarily pay for everyday items like groceries or gas?



## Two thirds of Gen Z adults say they go shopping for fun at least once per month:

About how often do you go shopping for fun? This includes shopping when you are not looking for anything in particular.

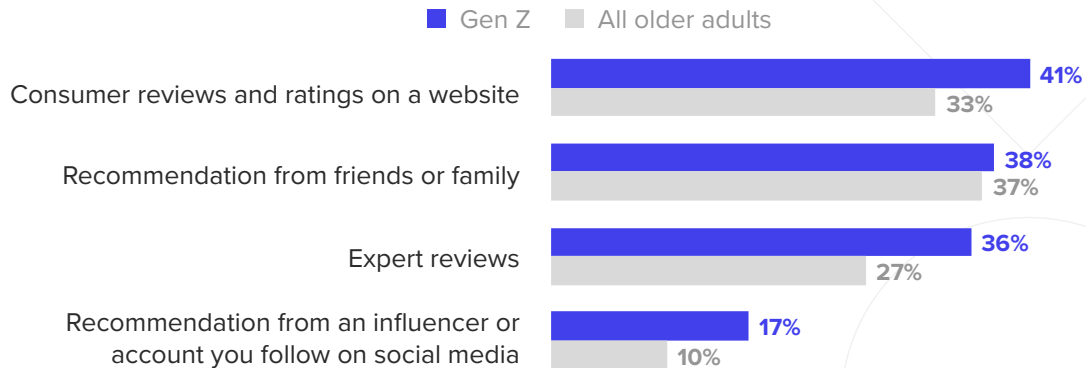






### Which reviews matter most:

How important are each of the following when deciding whether or not to try a new product or service?

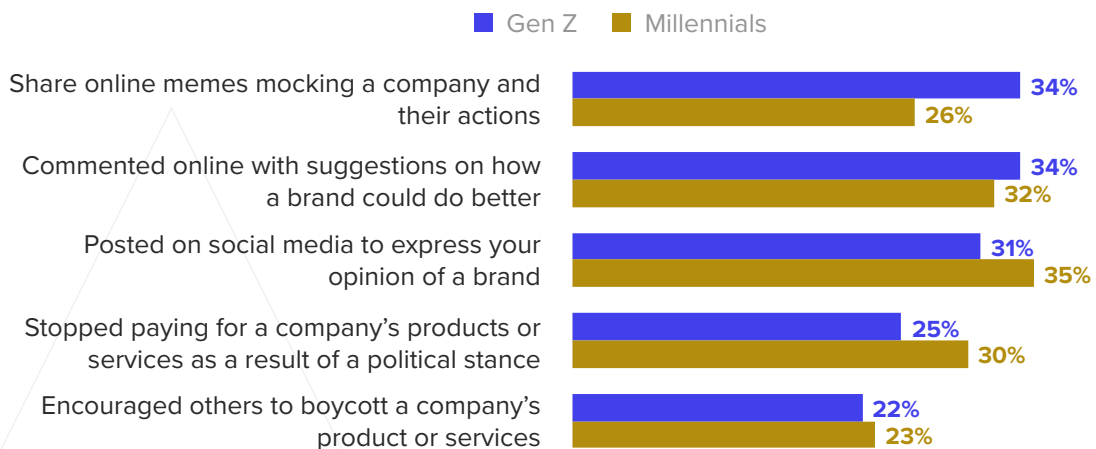


### CONSUMER REVIEWS PARTICULARLY IMPORTANT FOR GEN Z WOMEN

Fifty percent of women say consumer reviews are very important when making a purchase, and another 35 percent say they're somewhat important.

### Beware the memes: More than a third of Gen Z adults say they've mocked brands online in the past year for political reasons.

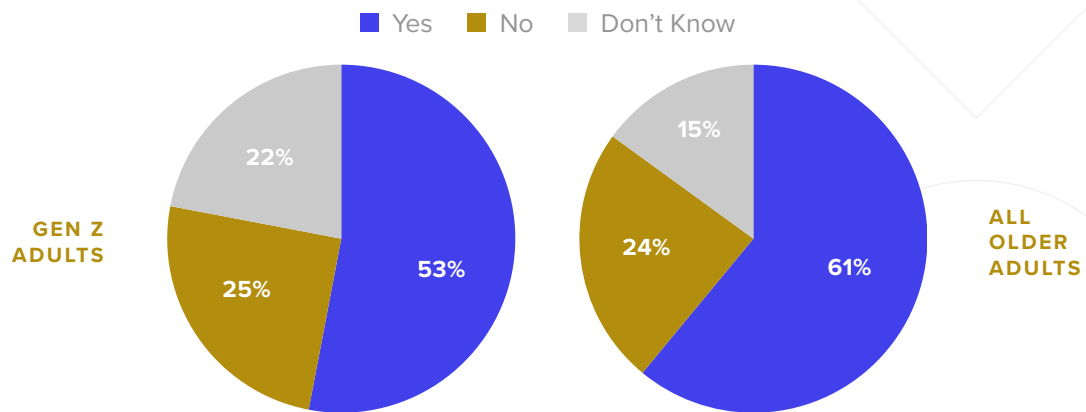
In the past year, have you done any of the following for political reasons, or not?





### About half of Gen Z adults say there are brands they are loyal to:

Thinking about the products and services you purchase, are there brands you are loyal to? This means you often buy from them even when there are alternative options.



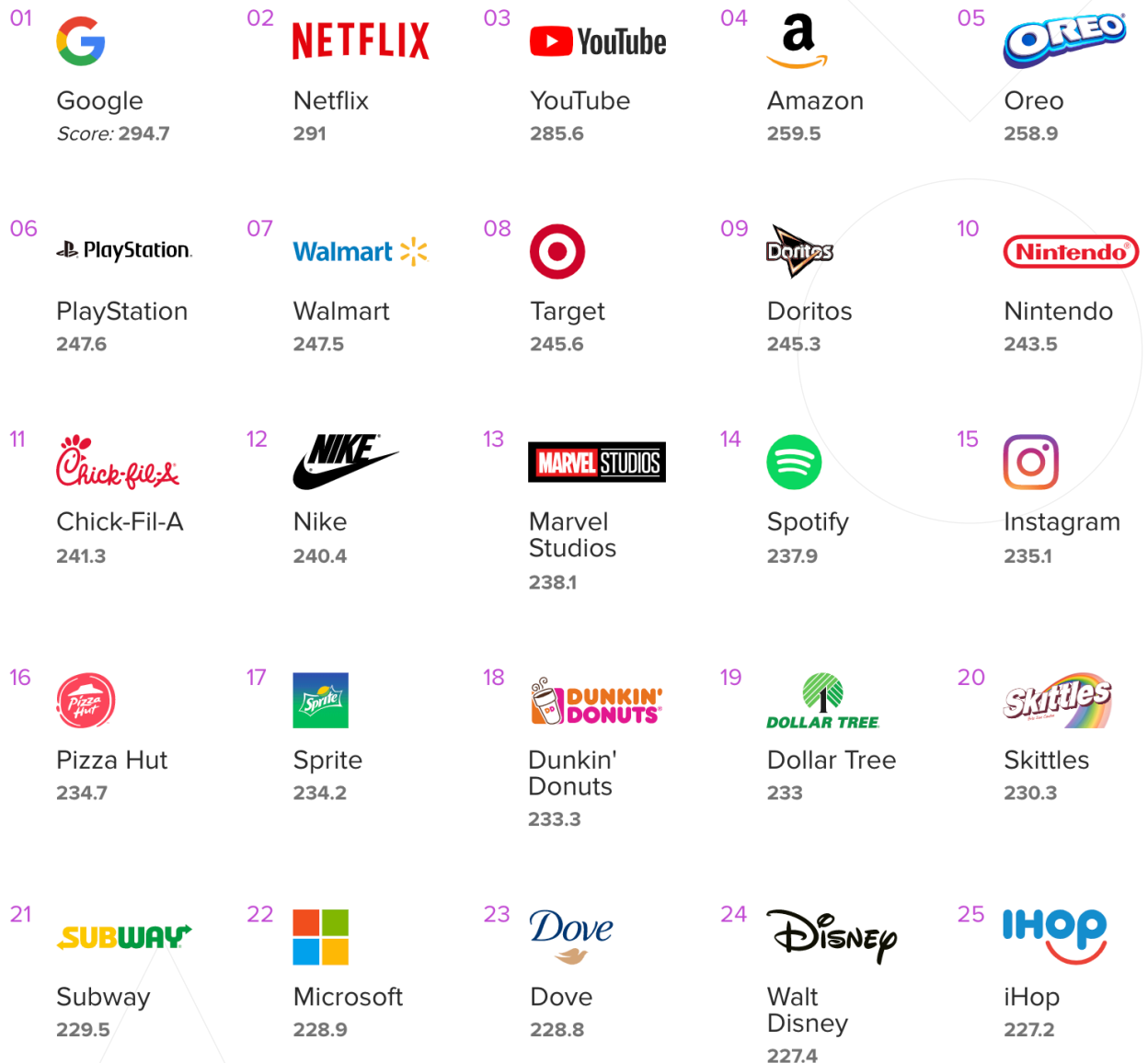
### Quality, price drive brand loyalty for Gen Z adults:

The share who say each factor contributes “a lot” to their brand loyalty consideration.





Gen Z's Most Loved Brands illustrate the distinctiveness of their consumer tastes, with tech, entertainment, and food brands outperforming other categories. To determine this year's rankings, Morning Consult measured favorability, trust, community impact, and Net Promoter Score.



[VIEW FULL RANKINGS](#)

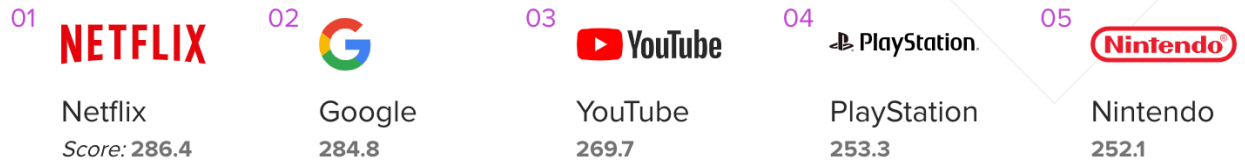
To view more on Most Loved Brands, including how we conducted this report, visit: [morningconsult.com/most-loved-brands-genz](https://morningconsult.com/most-loved-brands-genz)



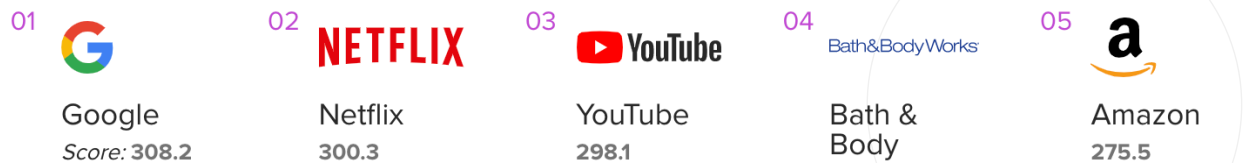
## Gen Z's Most Loved Brands By Demographic

### BY GENDER:

#### Male

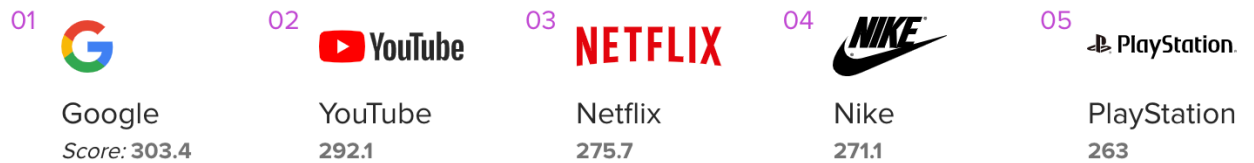


#### Female

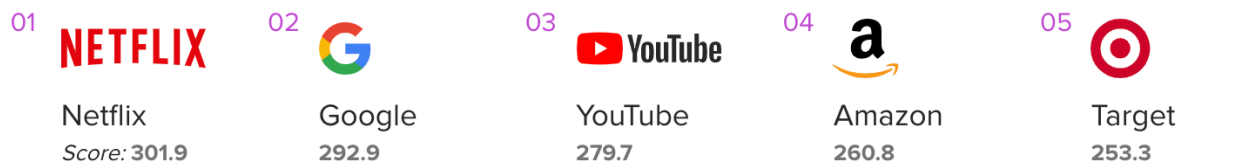


### BY RACE:

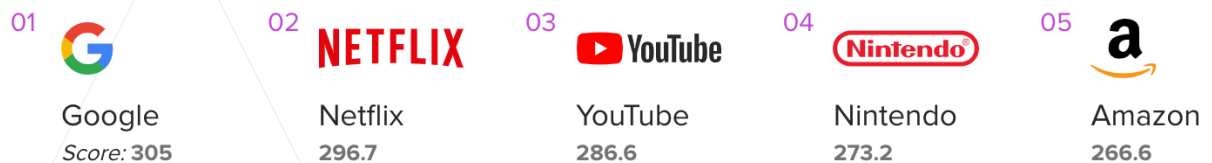
#### Black



#### White



#### Hispanic





# THE BRANDS THAT DO THE MOST GOOD, ACCORDING TO GEN Z ADULTS

Respondents were asked “which company do you think is doing the most good for society” and given the opportunity to respond however they liked. These are the companies that received at least 10 mentions.

TOTAL MENTIONS



Google

43



Apple

29



Amazon

28



Walmart

26



Tesla

24



Nike

22



Microsoft



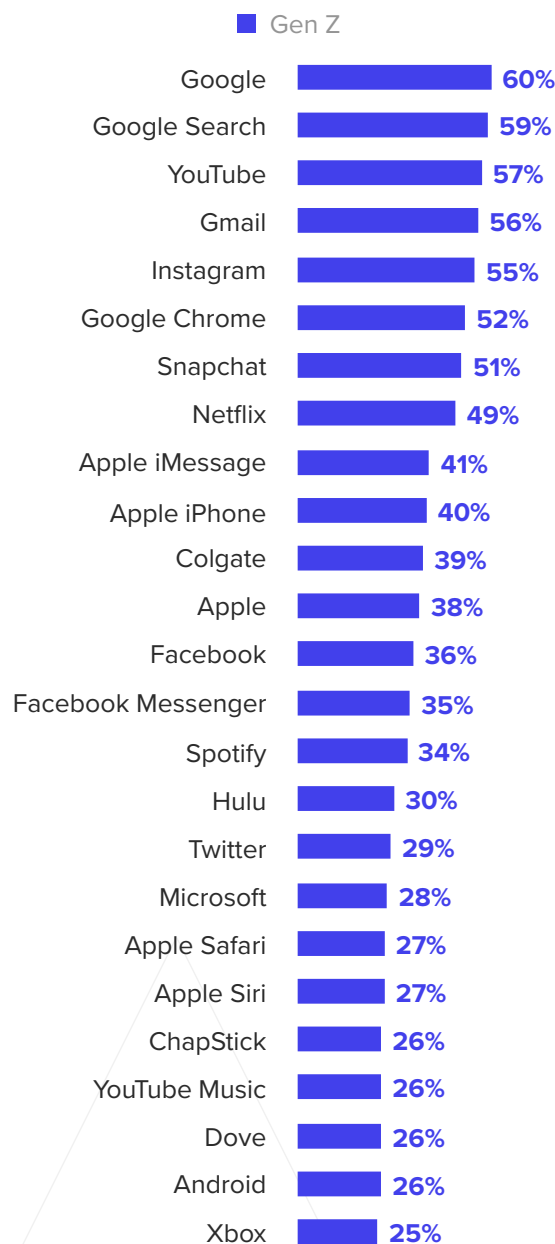
Target

14

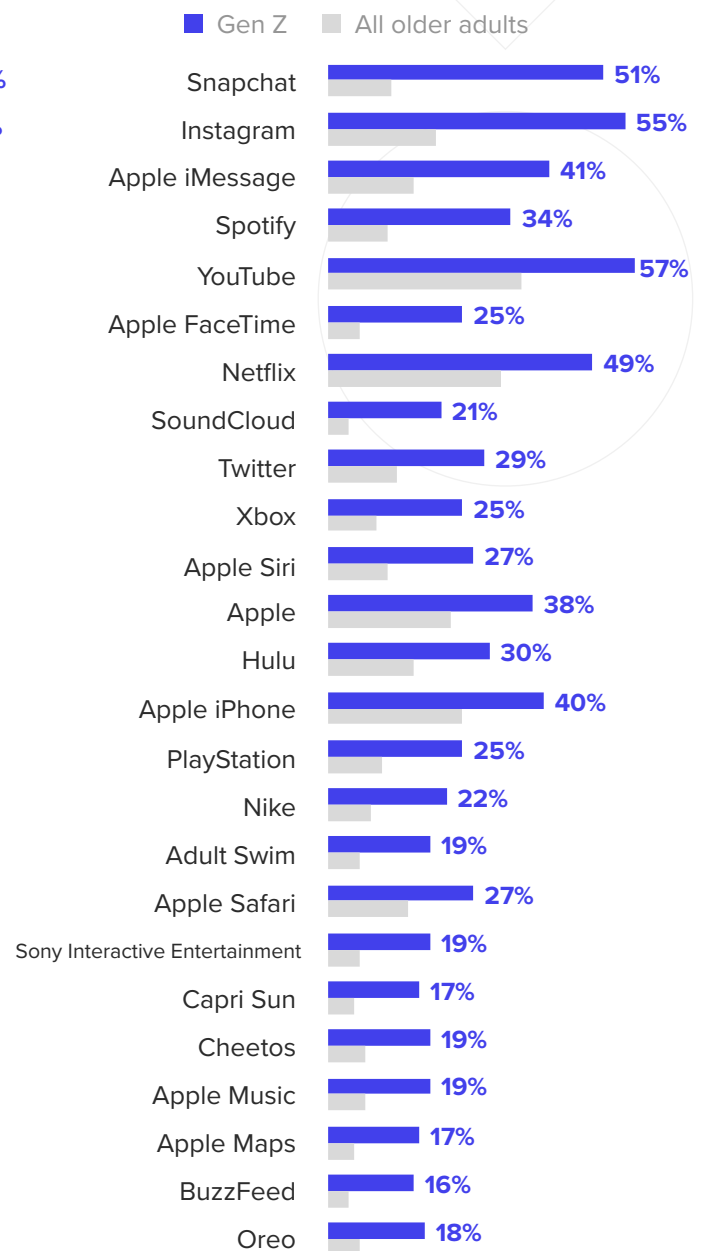


## Tech and social media brands are integral in Gen Z's day, particularly Apple and Google's suite of products, which make up 11 of the top 25 spots

The 25 brands Gen Z adults are most likely to use on a daily basis:



The 25 brands Gen Z adults are most likely to use, relative to older Americans:





## THE MOST INFLUENTIAL INFLUENCERS

Gen Z adults were asked the open-ended question: "Please name one celebrity, athlete or social media influencer that you would trust to recommend a product." These are the celebrities that got at least five mentions.

	TOTAL MENTIONS
Jeffree Star	29
The Kardashians (combined)	22
Beyoncé	20
Lebron James	
Rihanna	16
Elon Musk	11
Tati Westbrook	10
Serena Williams	9
James Charles	8
Kim Kardashian	
Kylie Jenner	
Shane Dawson	7
Ellen DeGeneres	
Jennifer Aniston	
Zendaya	
Steph Curry	6
PewDiePie	5
Lady Gaga	
Tom Hanks	
Jenna Marbles	
Dwayne "The Rock" Johnson	





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