THE YOUTH REPORT

by PACSUN

A deep dive into Gen Z and Gen Alpha, 2026

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Executive Summary

→ Digest Of Key Findings

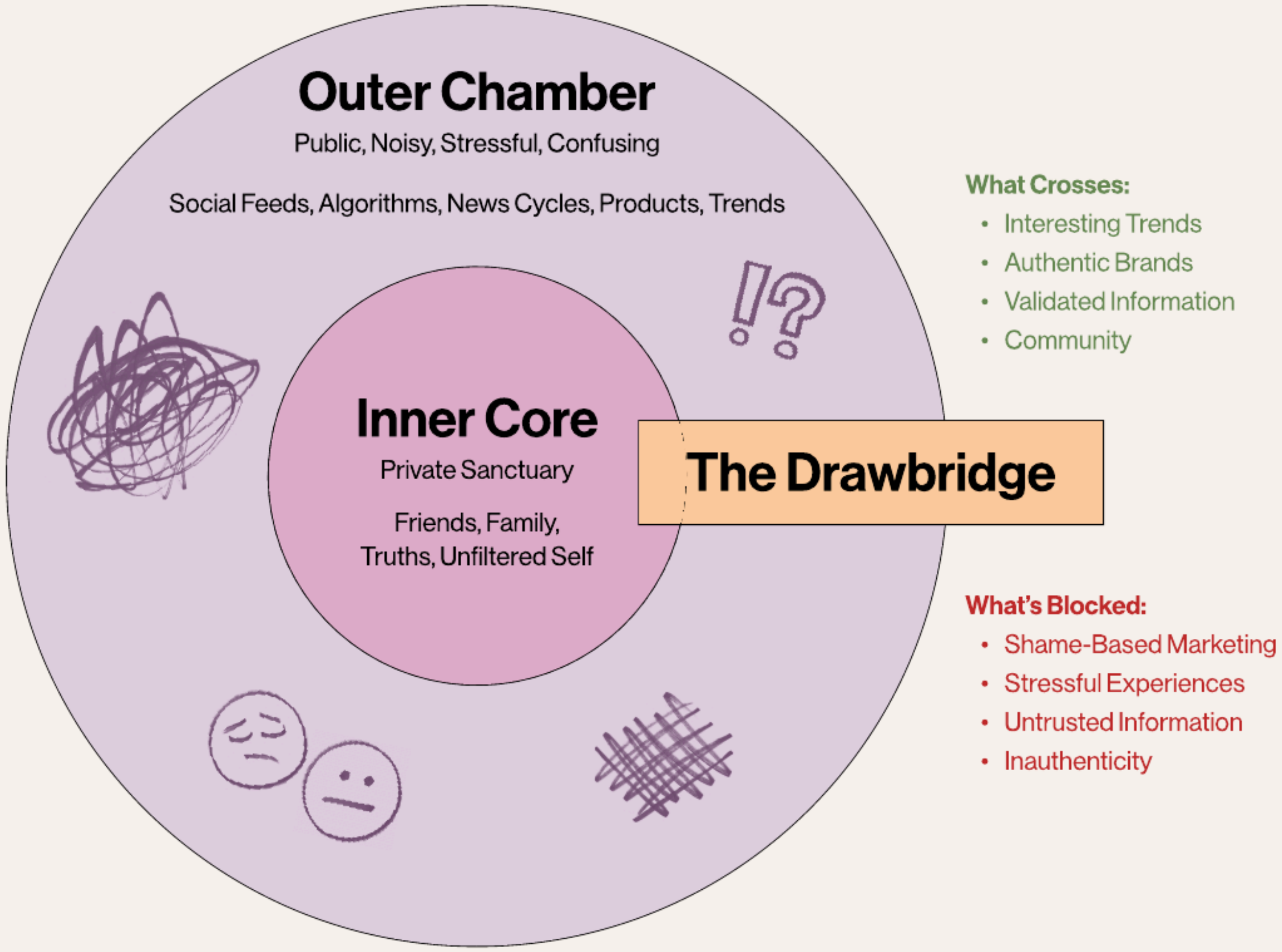
The Drawbridge Generation

Like any generation, the youth is not one homogeneous group.

It's a body of people with multiple viewpoints, behaviors, and traits. However, across all this research, two things hold true. First, the youth is very different from cohorts that have preceded it. This is not surprising since the times we live in are very different – AI proliferates, technology dominates, and social structures have changed. These forces have shaped, and are still shaping, the way the youth perceives the world. In turn, this impacts how they respond to it. All businesses need to be aware of these shifts and adapt their business models accordingly. Those that don't risk losing relevance with an entire generation of consumers.

The second truth lies in the architecture of how the youth live their lives.

Today's young Americans operate with two separate chambers. An outer chamber which is public and feels noisy, stressful, and confused. It's made up of social media feeds, influenced by algorithms, dominated by news cycles, and is often both a source of inspiration and a cause of anxiety. To protect themselves from the vicissitudes of the outer chamber, many have created an inner core. This is a more peaceful place where the unfiltered self lives along with trusted individuals like family and friends. It is the sanctuary from the chaotic outer world.


Outer Chamber
Public, Noisy, Stressful, Confusing
Social Feeds, Algorithms, News Cycles, Products, Trends
Inner Core
Private Sanctuary
Friends, Family,
Truths, Unfiltered Self
The Drawbridge
What Crosses:
Interesting Trends
Authentic Brands
Validated Information
Community
What's Blocked:
Shame-Based Marketing
Stressful Experiences
Untrusted Information
Inauthenticity

The two chambers are not entirely immiscible.

Things frequently move between them. A product seen in the busy outer chamber might be passed to trusted friends for assessment and validation. Equally, the values that come from family might govern responses to things in the noisy world beyond the core. But access and flow between the two is controlled by a drawbridge, which the youth controls. This often makes it incredibly difficult for brands and businesses to gain access to the most trusted space – something that is often seen in the lower levels of loyalty the youth has for some brands, or the skepticism they have of inauthentic messaging.

Many of the traits of the youth, some of which are explored in this research, reflect the conflict and interplay of the two worlds.

Things like trying to present an authentic image, using fashion to regulate moods, using AI but not trusting it, turning to kith and kin for truth, feeling the anxiety of benchmarked living, making trade-offs between deeply held values and economic realities, and renegotiating the American Dream – are all hallmarks of how the youth structure their lives. Brands and businesses that want to play more than a fleeting role in the lives of youth consumers need to understand these things and build their business practices around them.

Getting access to the inner core is increasingly difficult for brands and businesses. While the youth is an open generation, they are very selective about what, and who, they allow into their inner core. However, once access is granted it is rewarded with strong loyalty and affinity. Brands that cross the drawbridge are those that show up authentically, go beyond simply trying to sell things, and become an authentic part of the culture and community of the youth.

The Key Themes

→ Summary Of Research Themes

The Seven Traits

The research covers a great deal of ground. From it, we have identified seven key findings that offer insight into today's youth and are important to understanding how they engage with businesses.

Applause To Armor

How the youth transitions from pleasing the crowd to pleasing themselves

Fashion Therapy

How the youth increasingly dresses to create feelings and moods, not just for looks

The Guilt Tariff

How guilt has become the tax for ethical standards the youth cannot afford

The Intimacy Firewall

How AI has captured the hands of the youth, but is not trusted with the heart

The Kinship Premium

How the custody of trust in decision making mostly belongs to kith and kin

Benchmarked Living

How the constant social media feed creates an anxious generation

The American Dream 2.0

How the American Dream has been amended to fit youth priorities

Applause To Armor

From Performing For The Crowd To Pleasing Oneself

Across multiple dimensions, there is a big difference in the way in which Gen Alpha and Gen Z approach the world. Gen Alpha tends to look for applause – taking cues and references from external audiences, including social media and celebrities. The early years are peer referenced. By contrast, older consumers are more self-referential and prefer to shop less for how they want to be seen and more for how they want to feel.

Agreement percentages and gaps with key statements

What this means for business

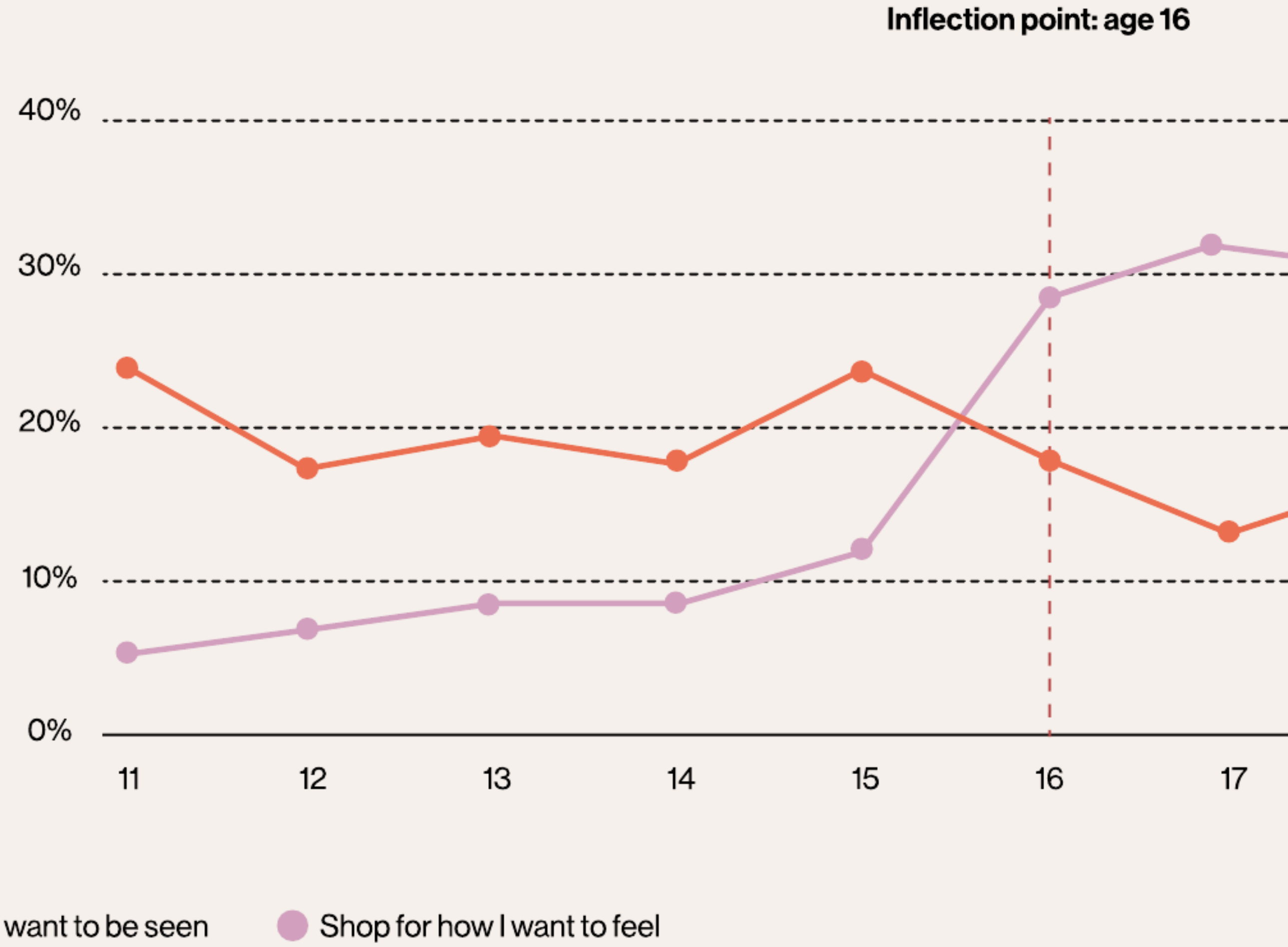
Brands don't have one youth market – they essentially serve two, with a split between Gen Alpha and Gen Z. To the younger audience, visibility is a selling tool and celebrity, follower counts, and popularity are key tools for conversion. For the older youth shopper, the same cues can repel, especially if they come across as inauthentic. The fix is optionality. Some loud drops and celebrity-fronted ranges work well. But, in parallel, it's necessary to build quieter lines that are peer-led, more niche, and which lean more into storytelling. Forcing one strategy across the whole age band means losing one side or the other.

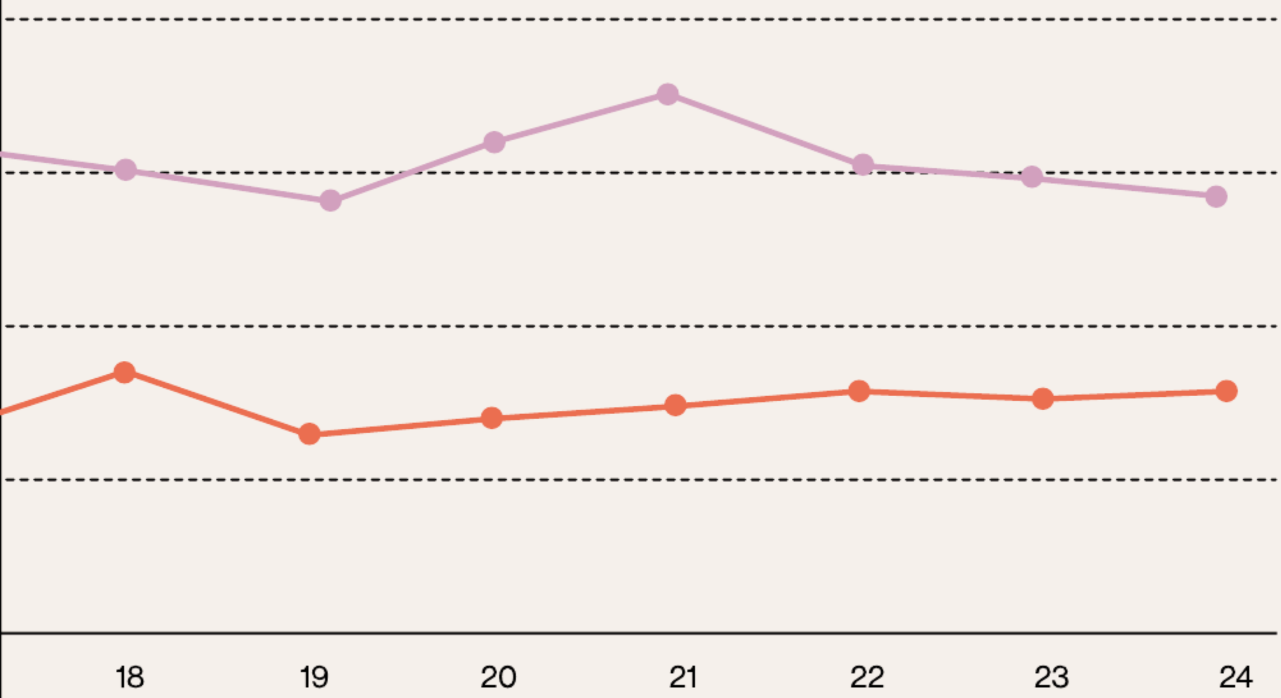
Applause To Armor

The Inflection Point

When looked at by individual ages, the inflection point for developing an 'armor' from external influence seems to come around age 16. This is the point when most youth consumers have more of their own money to spend and start to become more confident in their own personalities and styles. The general trends suggest that the differences between Gen Alpha and Gen Z are more a matter of life stage than of inherent differences in how the generations view the world.

Percentages agreeing with different shopping styles

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24

Fashion Therapy

The Youth Dresses To Create Feelings

Appearance matters to the youth, but not just because of the external signals fashion sends. More than other generations, the youth finds that their appearance influences how they think, feel, and behave. This 'enclothed cognition' means that fashion, especially apparel, is a tool for wellness and mood creation. This is particularly important amid the anxiety and uncertainty that can weigh heavy on youth consumers.

Fashion and my appearance...

IMPACTS HOW I FEEL	INFLUENCES HOW I ACT	IMPACTS HOW I INTERACT WITH OTHERS
Youth:	**Youth:**	**Youth:**
69.2%	**53.2%**	**50.5%**
Older Consumers	Older Consumers	Older Consumers
51.7%	38.6%	39.4%

What this means for business

Fashion businesses need to understand that many youth consumers look at products through two lenses: as a social signal and as a mood tool. As such, it's important to sell the feeling and not just the fit.

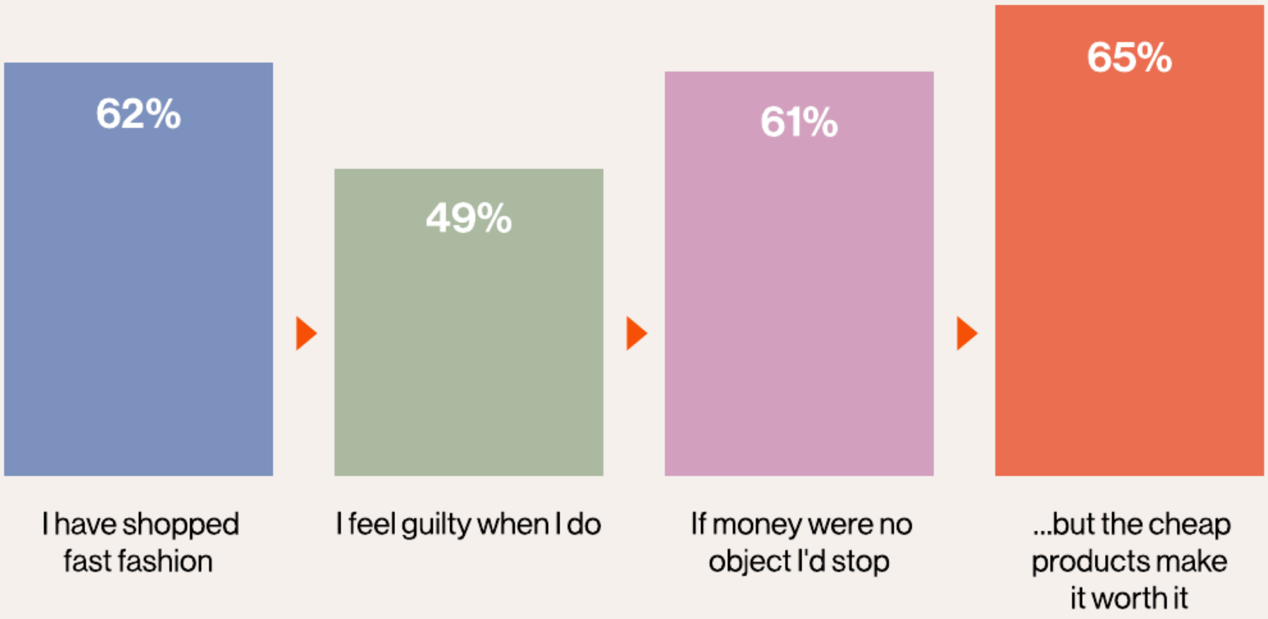
Product storytelling, campaign copy, and in-store experience all need to speak to how an item makes someone feel. Adjectives like confident, calm, and comfortable are as important descriptors as color, fit, and style. Ignoring this emotional register is a lost opportunity to create genuine connection and meaning.

The Guilt Tariff

Ethics Haven't Been Abandoned, But They're Now Subject To An Emotional Tax

The youth have relatively high ethical standards, especially when it comes to sustainability. However, the truth is that many are unable to always afford their values. Their income, not their ethics, sets what they can afford and drives behaviors such as buying fast fashion. Guilt is the tax paid for the divergence between values and behavior. This is one of the reasons alternative channels like resale have become popular. Some 67% have bought or are open to secondhand, and 23% bought more vintage / secondhand this year.

Fashion and my appearance...



What this means for business

Businesses shouldn't mistake fast-fashion spend as indicating a lack of values among the youth. The reality is that it's more related to a lack of budget than a lack of belief.

Integrating ethics – even if only partial – alongside affordability can be a winning proposition. Resale is proof that this works. It's a channel where budget and conscience align, and is growing because of it.

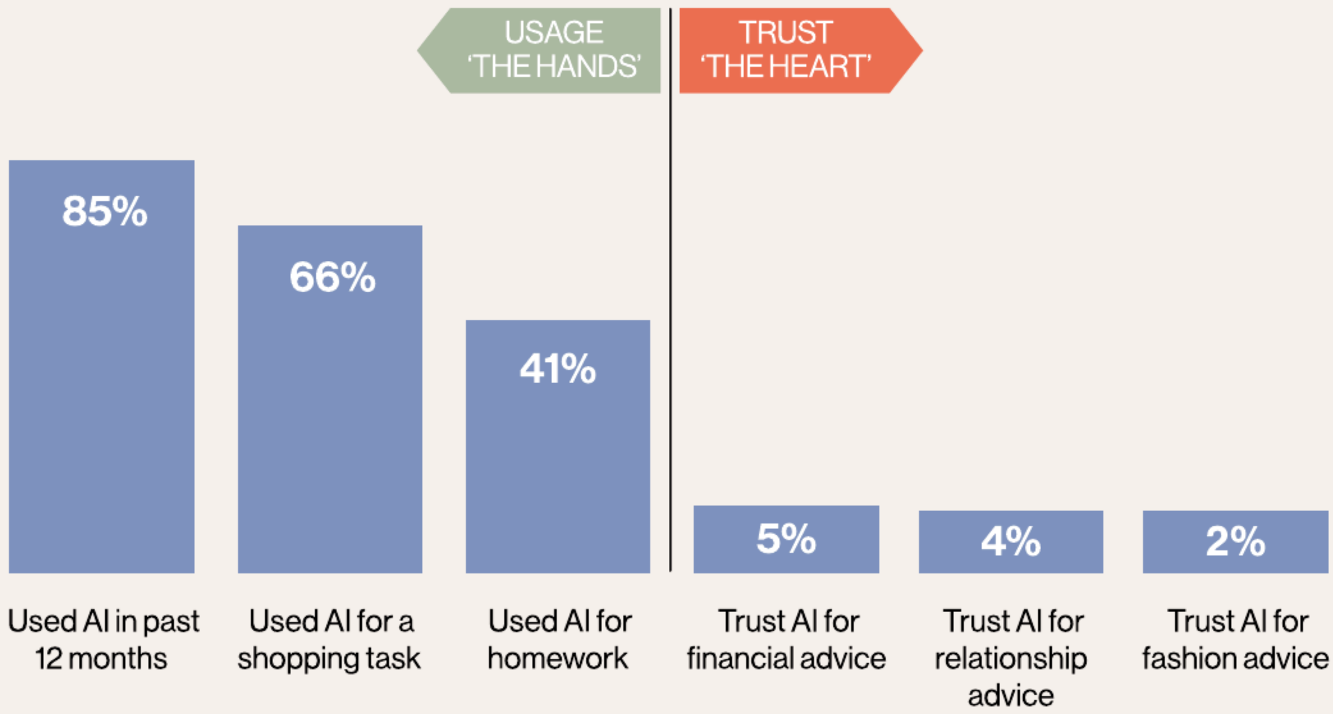
This comes with two notes of caution. First, the youth is particularly perceptive at spotting inauthenticity. Second, even for the youth, factors like sustainability do not trump desirable products.

The Intimacy Firewall

AI Has Conquered The Hands, But It's Not Captured The Heart

The tech-savvy youth uses AI extensively. But their usage shows a very clear pattern. AI has conquered the hands and has been refused by the heart. In other words, they use AI for basic tasks and research, but they refuse to trust it when it comes to more intimate and personal decisions. In more psychological terms, there's a stark difference between instrumental trust (does it work?) versus affective trust (does it care?). AI very firmly sits within the former.

Percentage of youth who...



What this means for business

AI needs to be deployed with caution. While the youth is happy to let it into the transactional side of many activities, they don't want it to run the relationship they have with brands or businesses.

That means AI has a clear purpose. It can help with functional aspects like order tracking, search, price-comparison, summarizing reviews and so forth. However, it is less good at roles that require a personal touch like styling advice or brand storytelling.

Brands that let AI drift into the second lane run the risk of damaging the connection and community that the youth crave.

The Kinship Premium

The Custody Of Trust Belongs To Kith And Kin

For a generation that has access to infinite information, the scarcest commodity for the youth is a trusted filter. Here, they have concluded that the most reliable filter comes from kith and kin. Even on things like financial advice and mental health support, family has a big lead over professionals. Influencers never break 11% in any domain. And AI never breaks 5%. In essence, the person trusted the most is the one they know, not the one with the most followers.

Who is trusted most for...

	FAMILY	FRIENDS	PROFESSIONALS	INFLUENCERS
FINANCIAL ADVICE	41%	10%	9%	8%
MENTAL HEALTH SUPPORT	29%	19%	14%	7%
FASHION ADVICE	27%	34%	1%	11%

What this means for business

Businesses need to understand that they may have to satisfy multiple audiences — parents as well as the youth consumer. This could mean creating family shopping events or experiences designed with both in mind.

Fashion brands also need to build consistent trust among peers, as youth consumers talk and compare constantly.

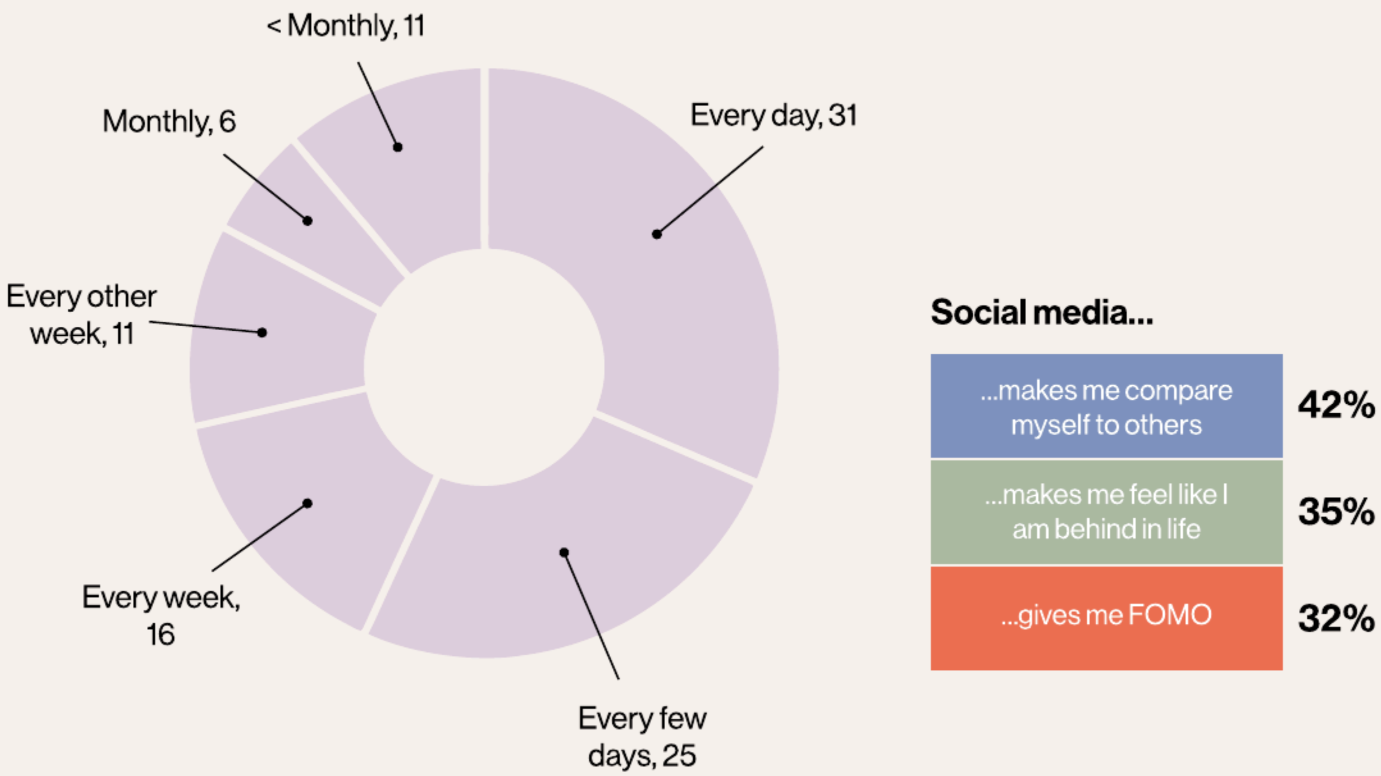
Businesses can't out-influence family or friends. If they want to create deep trust, they need to find ways to get inside the circle.

Benchmarked Living

Anxiety Is Caused By Feelings Of Being Behind

The youth is a particularly anxious generation. For many, life has become something of a leaderboard, perpetuated by social media and the comparative behaviors it facilitates. This can lead to feelings of being behind and cause subsequent anxieties. Among Gen Alpha, the continual striving for peer-validation is particularly stressful.

How often anxiety bites and why social media harms mental health



What this means for business

Brands and businesses need to be conscious of the anxiety the youth battles with and must make sure they do not exploit this for commercial reasons. Selling that is exploitative may drive short term activity, but this will often come at the expense of long term loyalty.

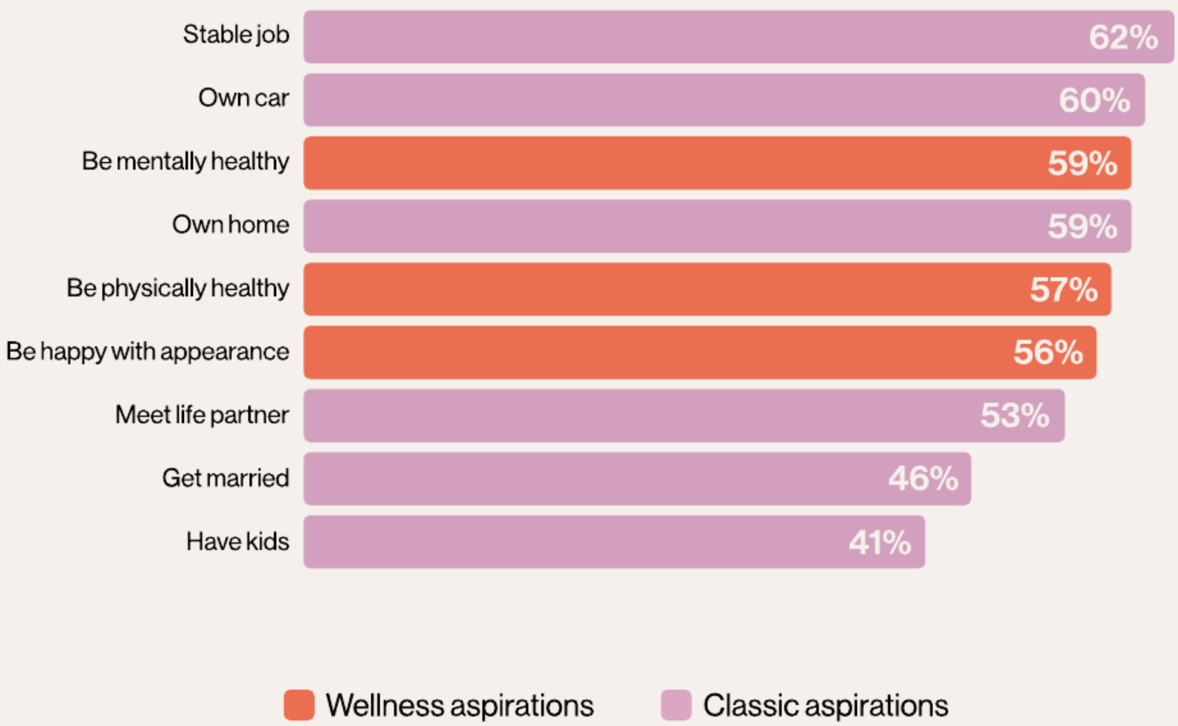
Longer term affinity is driven by brands that help consumers feel calm – either through the physical spaces they create, or how they generally show up in the world. Establishing a sense of community is also important as this provides reassurance and a sense of belonging. In marketing, showing up authentically is becoming more important.

The American Dream 2.0

The American Dream Has Been Amended

The youth faces a different adulthood contract than those that went before them. As such, the traditional American Dream has been amended because of financial constraints and changes in lifestyle. Classic goals like a stable job and owning a car remain, others like owning a home also remain – even if they seem less attainable. However, infused with these classic aspirations are newer goals around wellness and wellbeing – something that reflects the anxious world in which the youth lives.

Life goals the youth want to achieve by age 35...



What this means for business

As wellbeing has become an integral part of the youth's American Dream, brands and businesses now have license to focus on these things as achievements and aspirations.

However, businesses selling to the youth also need to look beyond materialism and show how the benefits help meet wider goals. For example, a home is for stability and peace, a car is for independence. In other words, campaigns and product stories should speak to the feeling behind the goal.

Businesses must also take account of the fact that spending on traditional tentpole life events will likely be phased differently in the future.

Identity

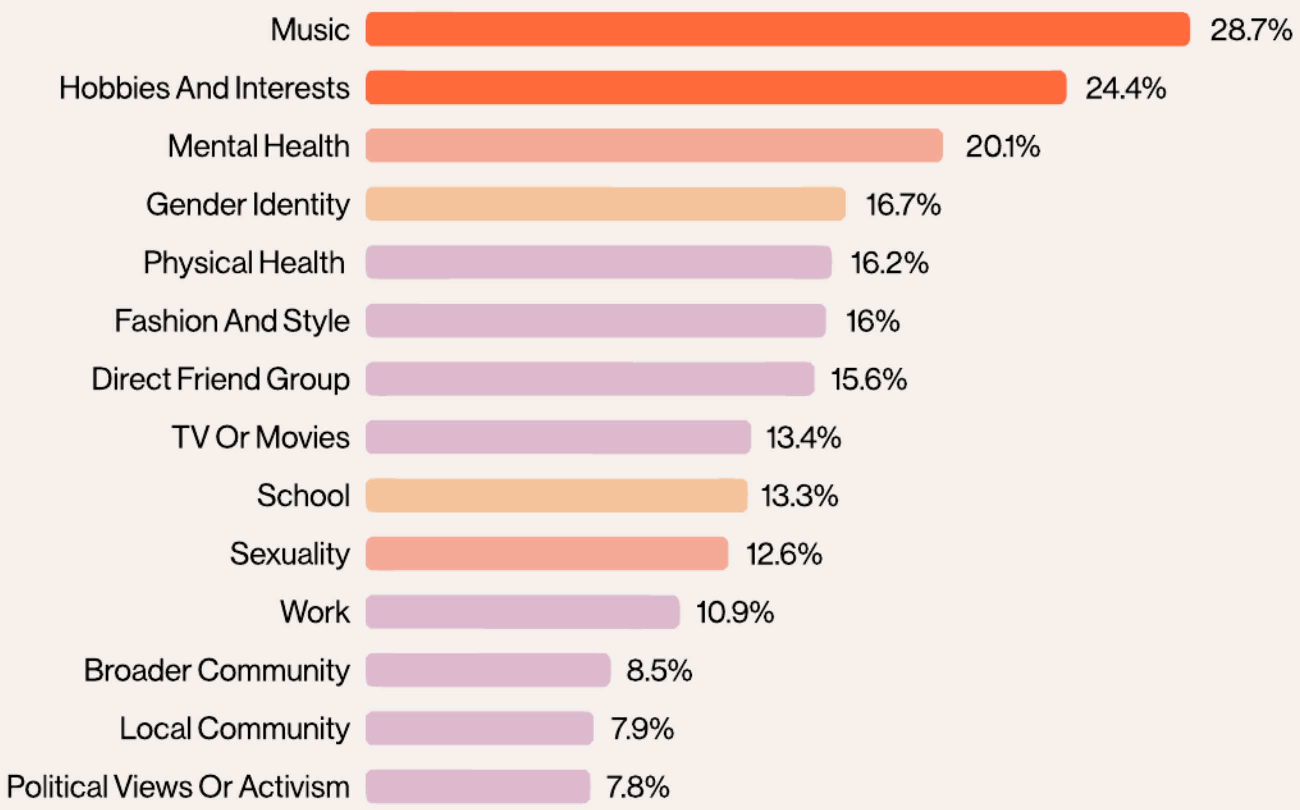
→ Insights into identity perceptions of the youth


CURRENT BIOGRAPHY
1946
1947
1948
1949
CURRENT BIOGRAPHY
1950
1951
1952

Music and hobbies influence youth identity

Respondents were most likely to rate music, hobbies/interests, mental health, and gender identity as having a huge impact on their identity. Self-expression is deemed extremely relevant to identity for the youth, evident through the over index of areas such as music and hobbies. Interestingly, Gen Alpha were significantly less likely than Gen Z to say that any category had a huge (10 out of 10) impact on their identity, suggesting that their identities are more fluid and less evolved given their comparatively younger age.

Factors deemed to have a 10/10 impact on identity

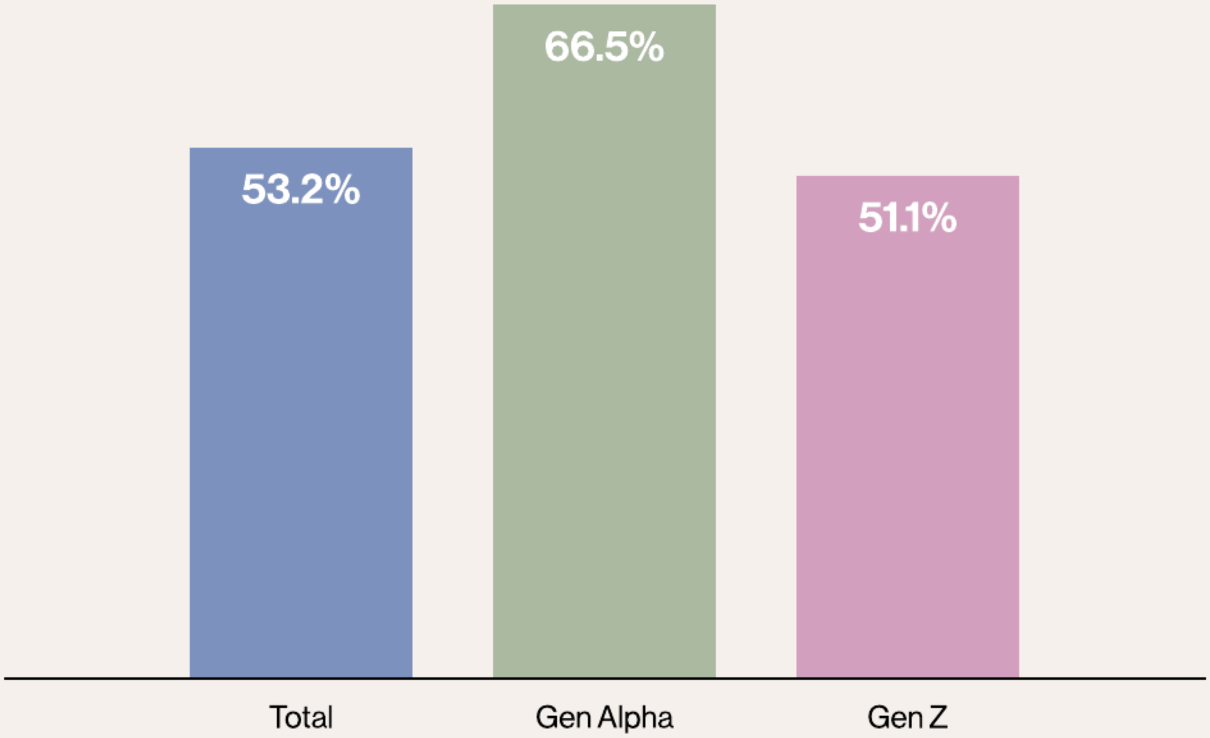


Base: 6,126 US respondents aged 11-24

Gen Alpha's appearance more actively impacts their identity

Over half of respondents rated appearance as having a significant impact on their identity. However, Gen Alpha significantly over indexed here, with 66.5% of respondents in this age group citing that appearance had a seven to ten out of ten impact on their identity. This suggests that appearance is becoming embedded in identity formation at a young age. Early media exposure, online comparison, and constant visual exposure is making appearance a more focal point of consideration in the identities of younger respondents.

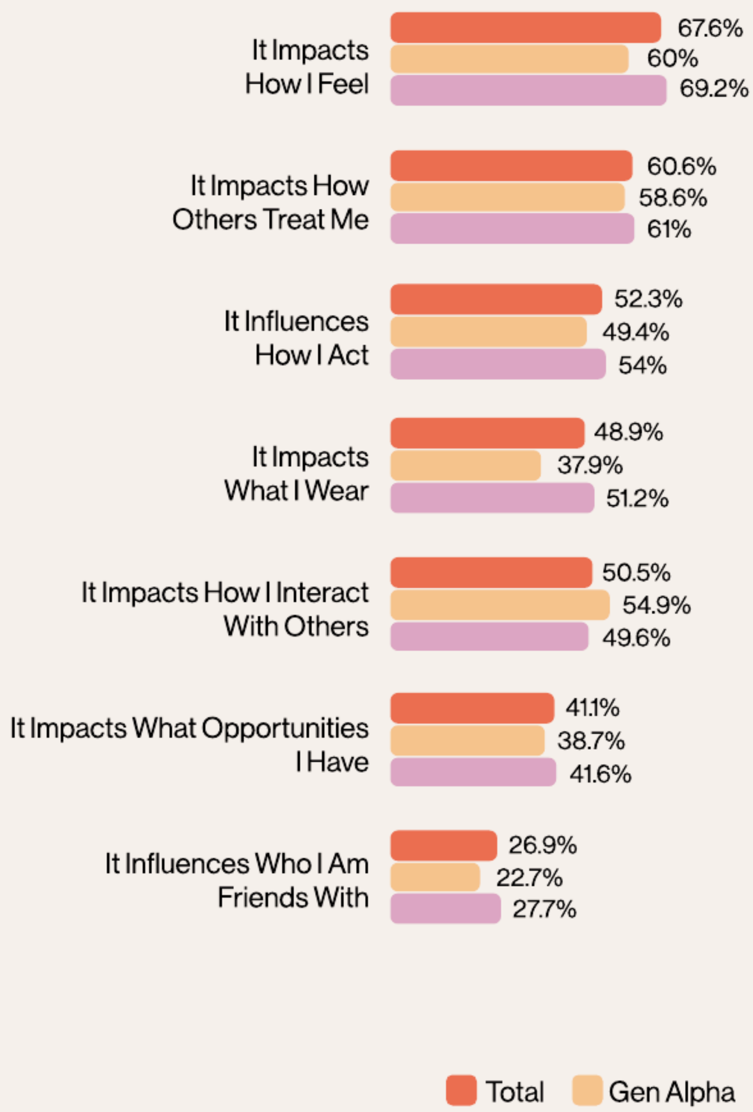
Proportion of respondents who claim that their appearance has a significant impact on their identity



Base: 6,126 US respondents aged 11-24
Note – data looks at proportion of respondents who cited appearance having a 7-10/10 impact

Appearance shapes both self perception and social perception

How the youth think appearance impacts their identity



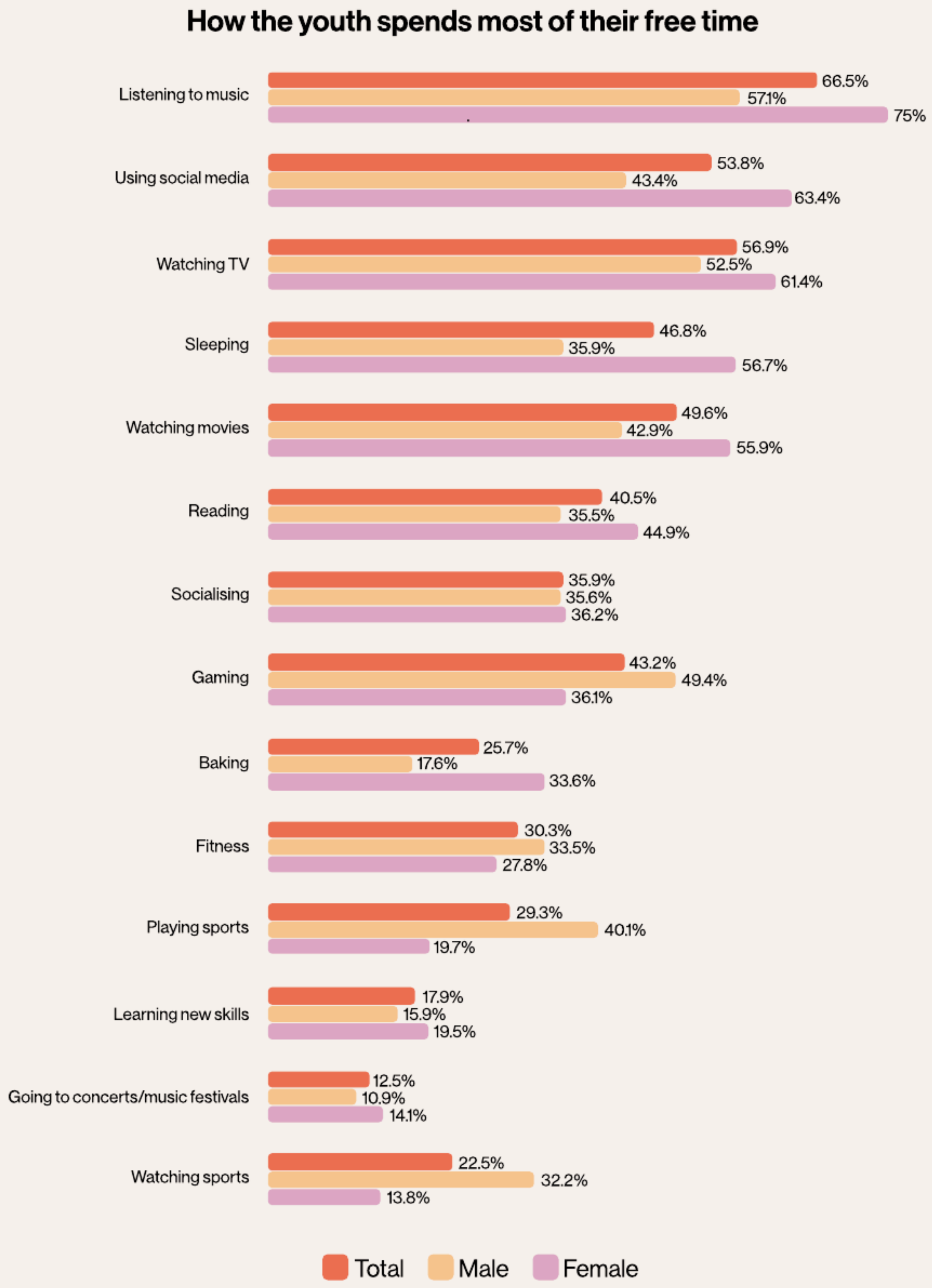
Gen Alpha are comparatively less sure about how their appearance impacts identity

Although Gen Alpha is much more likely than Gen Z to place identity weight on appearance, they are less likely to indicate why they do so. Again, this points to a degree of inexperience.

Gen Alpha acknowledge that appearance is relevant, but they're not too sure why.

Base: 3,883 US respondents aged 11-24 who indicated appearance has a 6-10 identity impact

Female hobbies center around creativity, but for males it's gaming



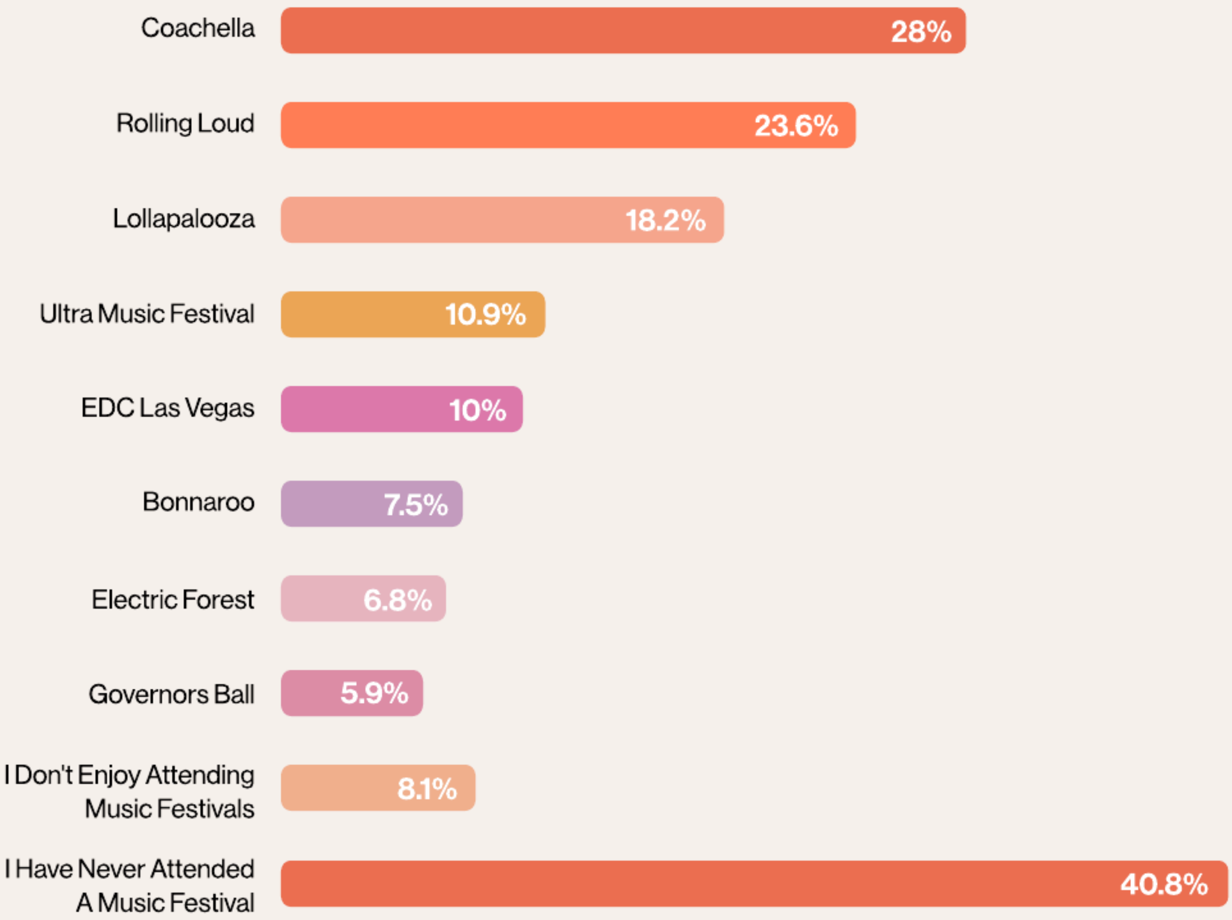
Base: 6,126 US respondents aged 11-24

Major festivals take the main stage

Coachella leads festival attendance/interest rates, followed closely by Rolling Loud and Lollapalooza, with a clear drop off after the top three. Festival attendance is shaped largely by music preference, social media influence, and regional access.

Interestingly, Gen Alpha over index on the more well-known festivals, such as the above listed, with this signifying that this demographic haven't yet found their niche and are therefore more influenced by larger cultural moments. This supports the narrative that Gen Alpha are more exposed to a broader array of influences in terms of identity formation, while influences on the identity of Gen Z are more curated.

Festivals already attended or interest in doing so



Base: 6,126 US respondents aged 11-24

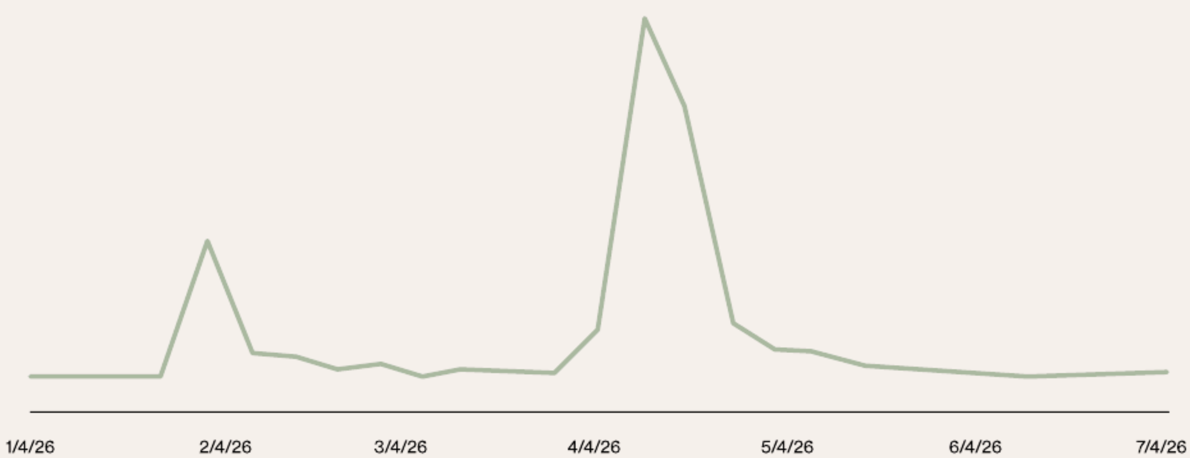
‘Bieberchella’ became a viral moment

Google Trends data shows that searches for ‘Justin Bieber’ in the US skyrocketed in February following his Grammy performance, and then once again in April thanks to his Coachella sets, which spread across two weekends. Of the two events, the surge in search activity in April was a lot greater. However, the Grammys drew in 14.4m viewers, while Bieber’s Coachella set drew in a peak of 10.6m concurrent viewers during his opening weekend set.

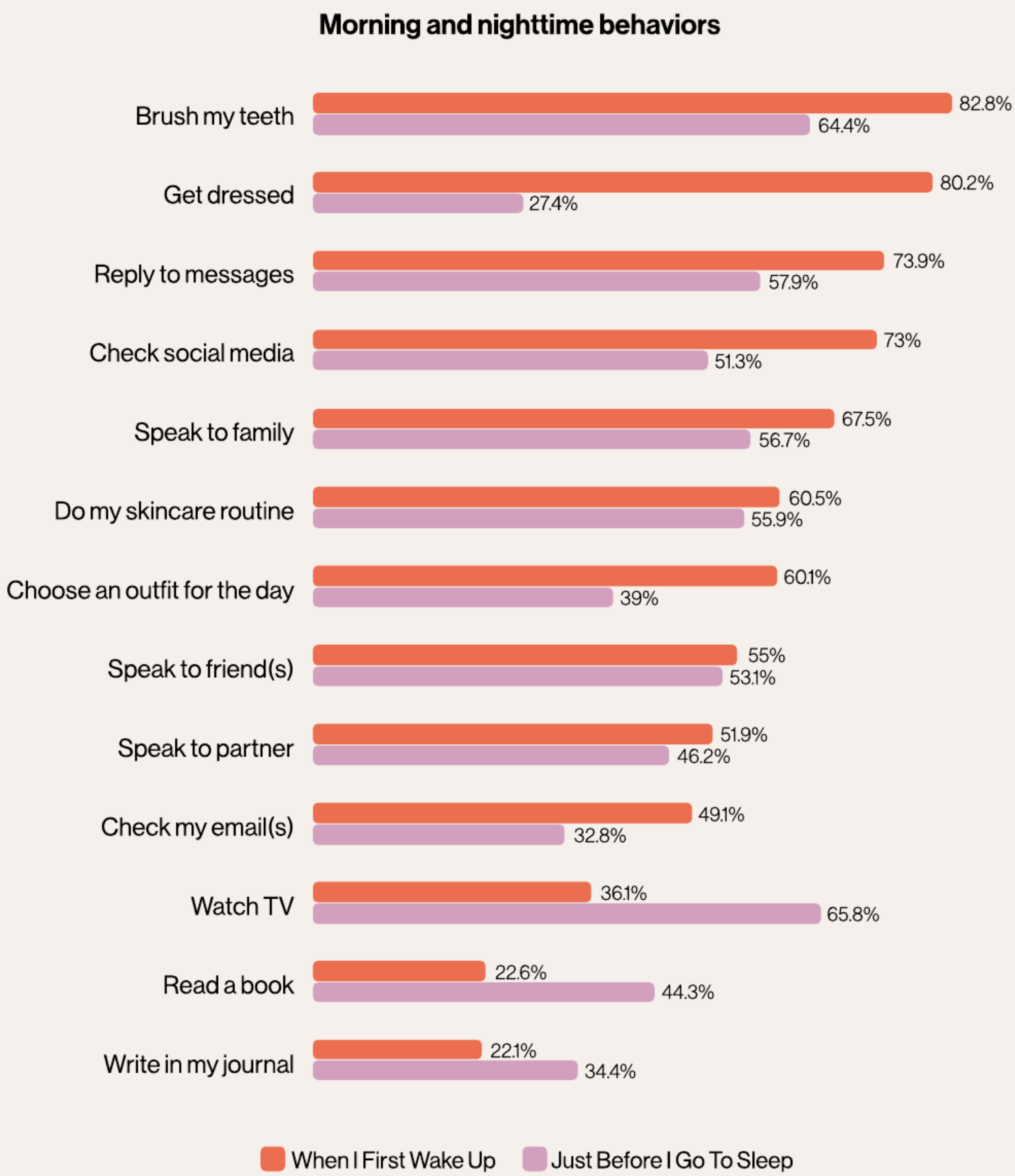
The difference in virality derived what happened after

Bieber’s nostalgia-fuelled Coachella set, seemingly designed for the at home viewer, went viral across numerous social media platforms. This reflects youth interest in engaging with large-scale cultural moments, even it is only in a virtual sense. It also underpins the idea that bigger doesn’t always mean better when it comes to creating viral content, it’s more about what resonates with the youth consumer.

Google searches for “Justin Bieber” in the US



Digital moments are engrained with daily rituals like brushing teeth

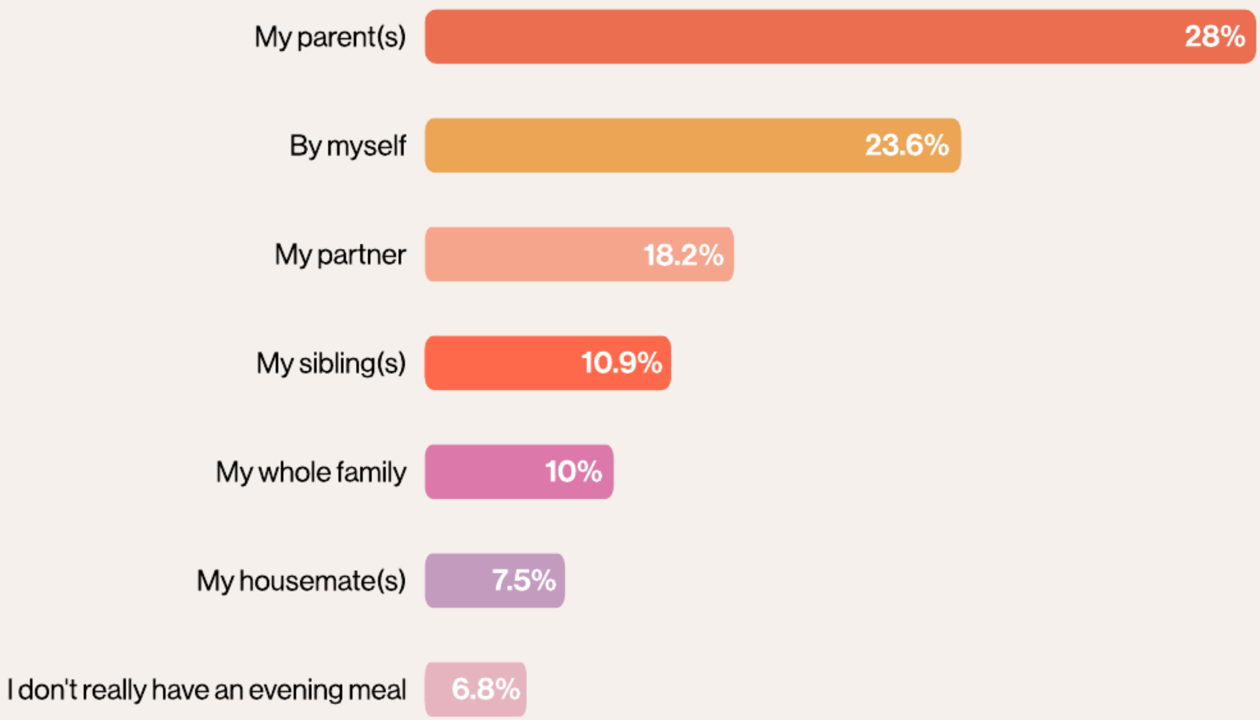


Base: 6,126 US respondents aged 11-24

Evening meals remain a time for family connection

Evening meals are most often shared with parents, with this largely driven by Gen Alpha, who still mostly live at home. However, nearly a quarter of respondents eat alone, with Gen Z significantly over indexing on this, indicating that this demographic are beginning to leave the family home and branch out on their own. As the youth increasingly rely on digital spaces more in their every day lives, human touchpoints like dinner with family or friends have become increasingly important.

Individuals the youth eat their evening meal with on a typical day

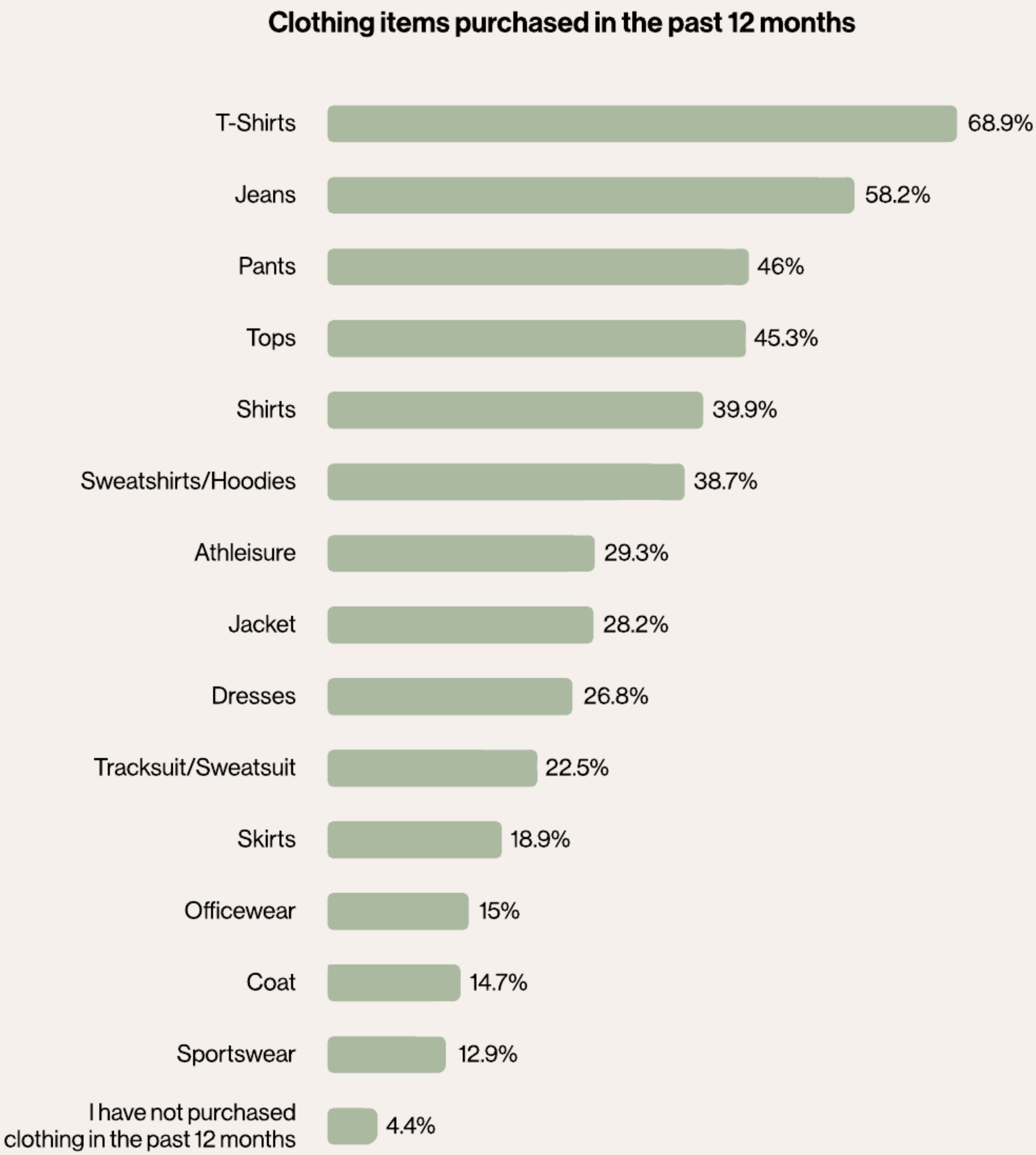


Base: 6,126 US respondents aged 11-24

Style Inspiration

→ Insights into style inspiration among the youth

Wardrobes are anchored in everyday basics



Base: 6,126 US respondents aged 11-24

Comfort is key for the youth

Over three in five youth respondents claimed they were buying more casual/comfortable clothing items this year, compared with last.

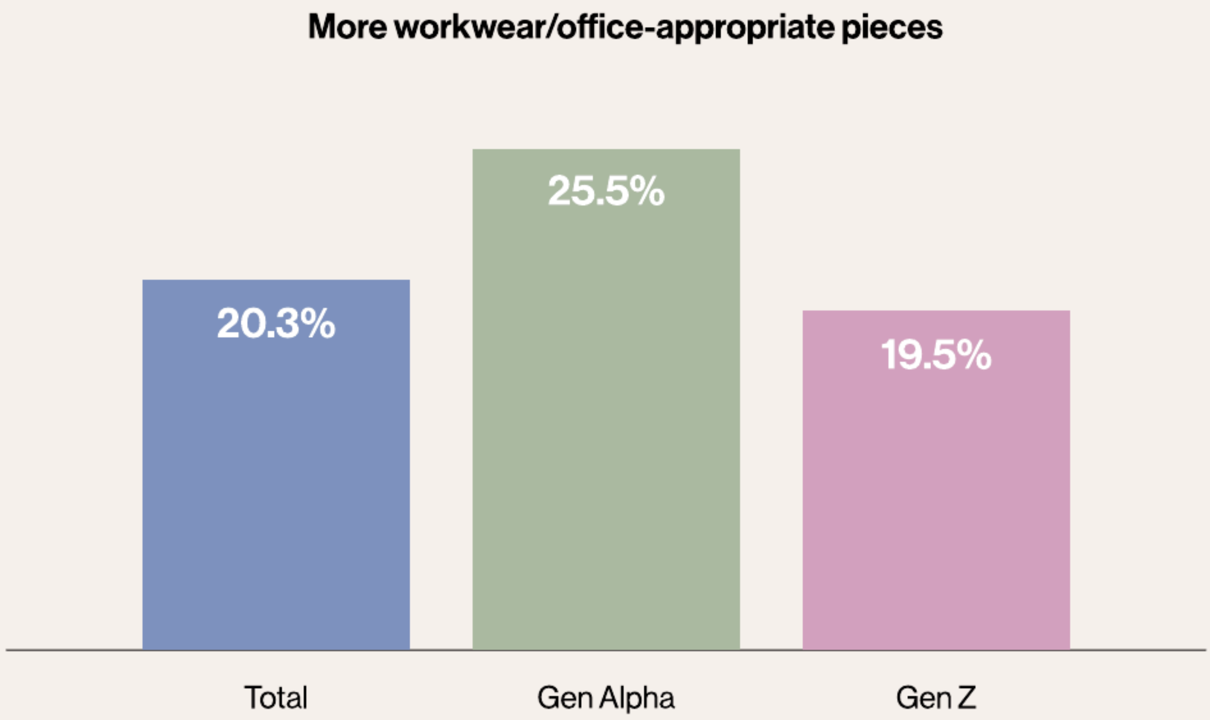
This indicates that the youth consumer is prioritizing fashion choices anchored in wearability. Over a third also said they were buying more dressy/going out pieces this year too, with this indicating a polarization of clothing spend. More specifically, the youth consumer enjoys buying items which help them look and feel their best on occasion, but overall, comfort-first items take priority. Mission or trend-focused clothing such as vintage, gym, and workwear sit below staples like comfort and "going out", suggesting aesthetics matter, but take a back seat to staple wardrobe necessities.

Base: 5,852 US respondents aged 11-24 who purchased clothing in the past 12 months

Gen Alpha romanticizes the working world

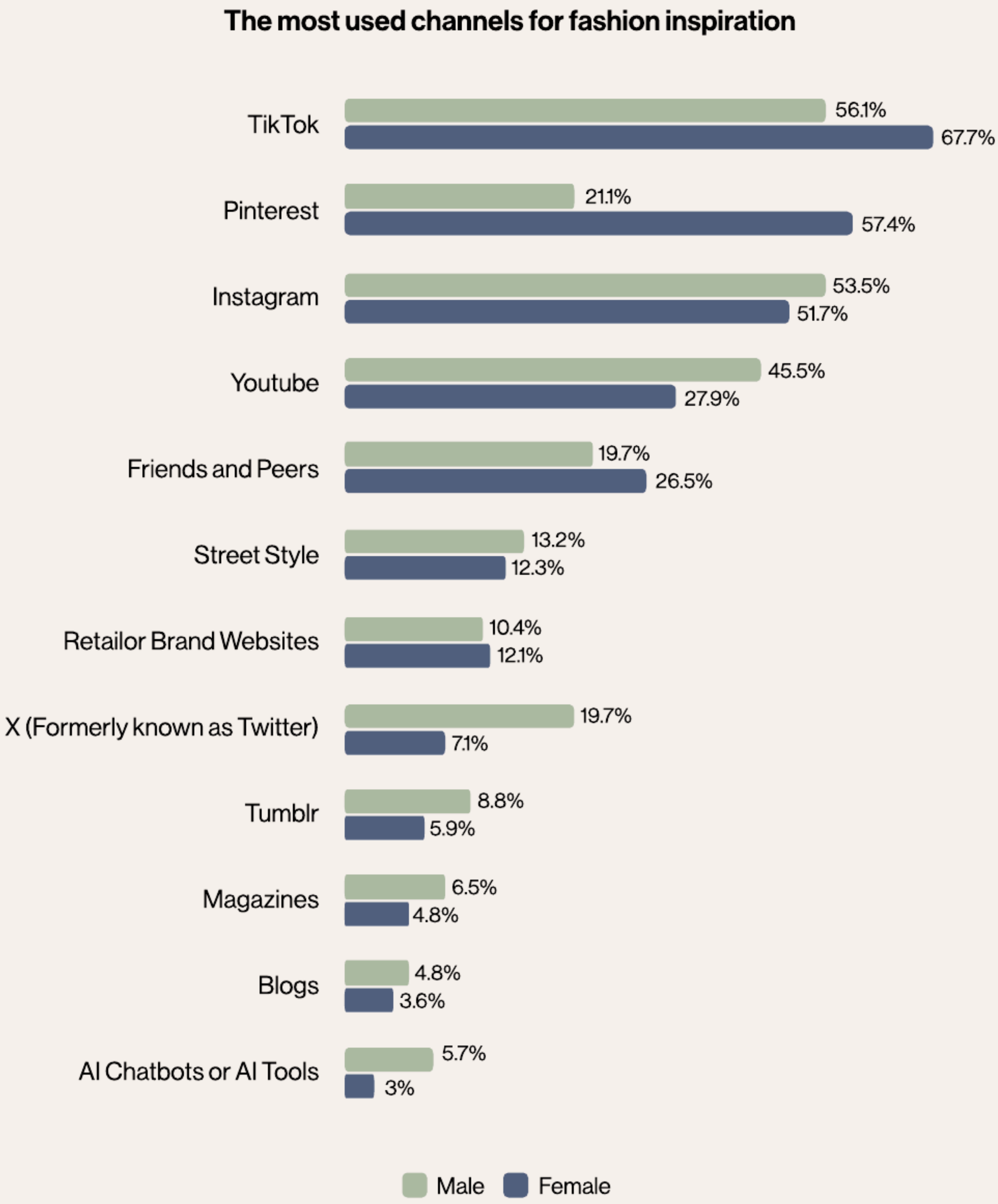
Interestingly, Gen Alpha over indexed in terms of increased purchase of workwear this year compared with last. For the most part, workwear remains fairly irrelevant to Gen Alpha in terms of necessary daily dress, but for this age group, items such as blazers, dress pants and button-downs are less about corporate dress and more about achieving a grown-up aesthetic.

These shifts have aligned with trends like "office siren" and "corpcore", both of which further reinforce this push towards workwear. According to Google Trends data, searches for these terms surge in the US during April and June, months whereby there's typically a high volume of internship or job acceptance, as well as start periods. Such trends are helping to shift work clothing from a simple necessity to an aesthetic-driven fashion movement that is capturing the attention of youth shoppers.



Base: 5,852 US respondents aged 11-24 who purchased clothing in the past 12 months

Image-led platforms inspire females when it comes to fashion



Base: 6,126 US respondents aged 11-24

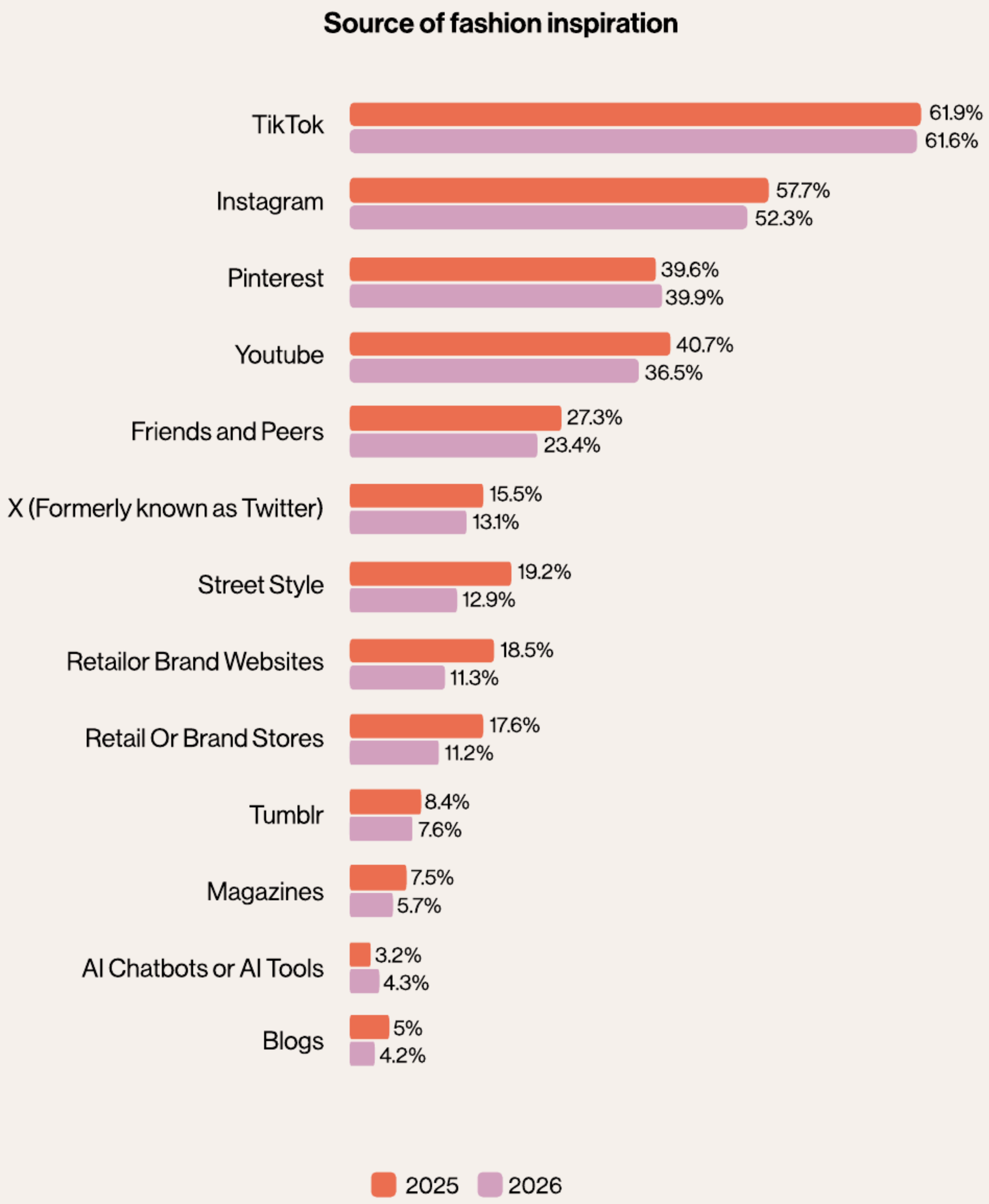
Fashion discovery should be viewed as a funnel

A discovery funnel persists in fashion

Social media remains a dominant force in fashion discovery. Whereas traditional channels like retail or brand stores witnessed the biggest year-on-year decrease.

That said, while social media remains the 'go to' source for fashion inspiration, outlets such as friends and peers or the physical store remain a crucial step in driving conversion.

Base: 5,852 US respondents aged 11-24 who purchased clothing in the past 12 months



Base: US respondents aged 11-24; 6,312 (2025) and 6,126 (2026)

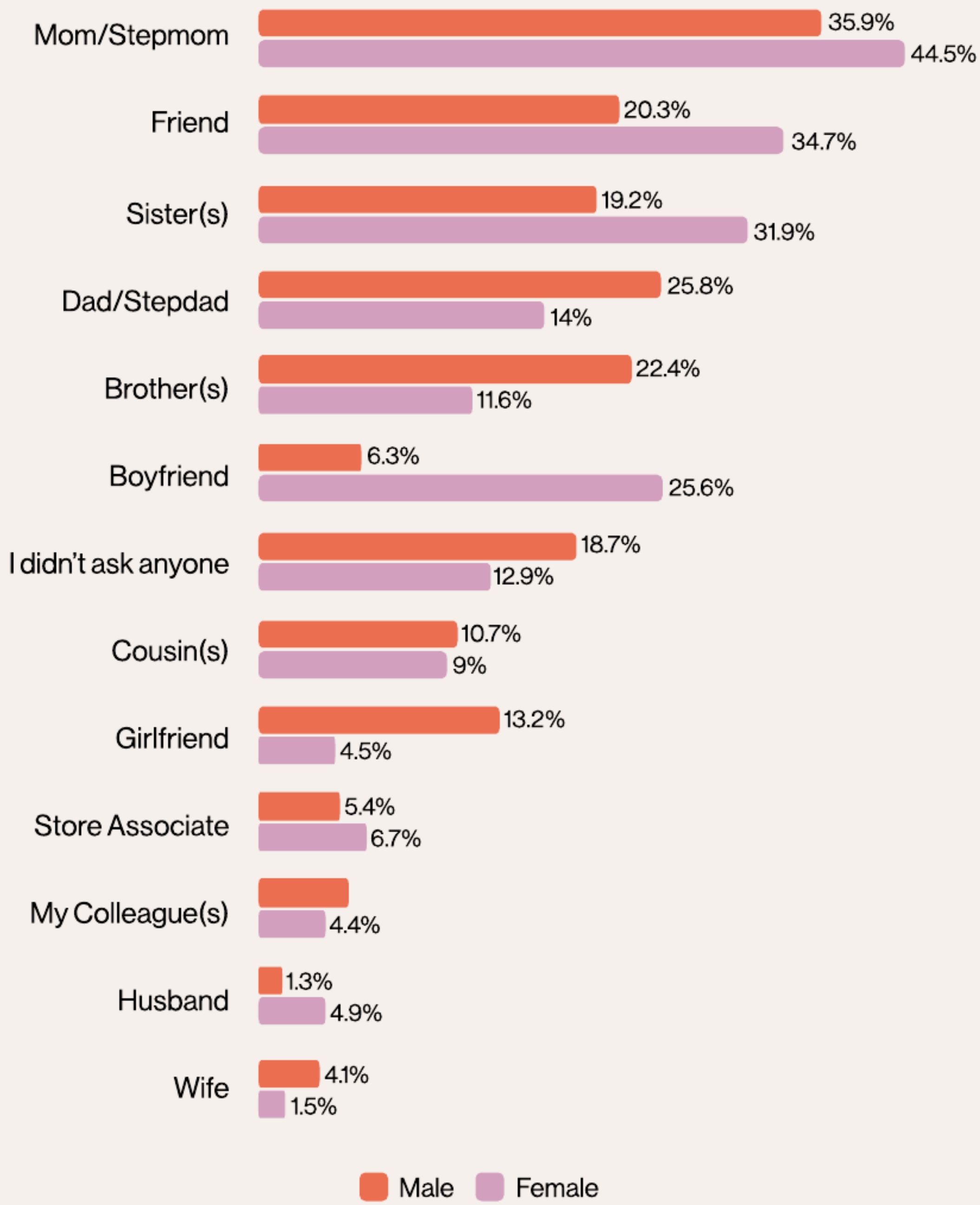
Advice remains largely grounded in personal channels

Although social media is a major source of fashion inspiration and discovery, advice remains largely personal and grounded, with people going to individuals they trust for advice before making purchasing decisions. This indicates that there are still substantial human touchpoints in the purchasing process, and that the youth have not fully outsourced their fashion choices to online channels.

Base: 6,126 US respondents aged 11-24

Females are more holistic in terms of seeking fashion advice

Who youth ask for fashion advice



Base: 5,852 US respondents aged 11-24 who purchased clothing in the past 12 months

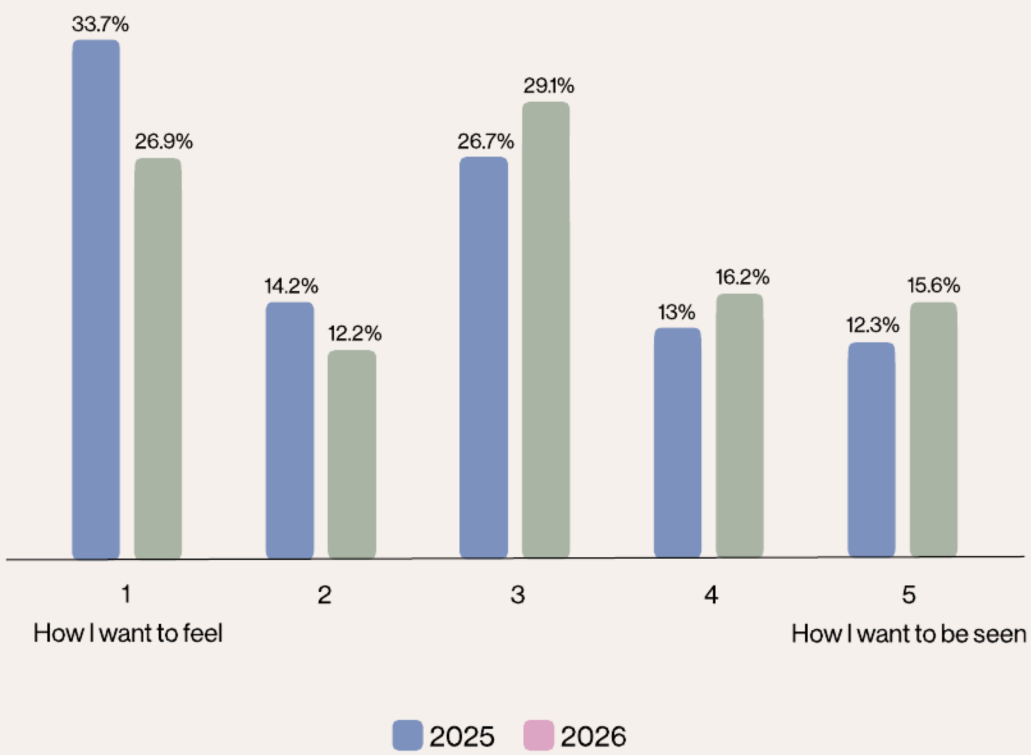
Clothing choice is increasingly driven by external validation

Driven mostly by Gen Alpha, clothing choices have become less about how young consumers want to feel and more how they want to be seen by others. As social media puts a magnifying glass on the appearance and aesthetic of young Americans, visual presentation is becoming more intentional.

The rise of 'Looksmaxxing', GLP-1s, online fitness culture, and general health and appearance optimization all coincide with this general push towards image curation.

Although Gen Alpha places far more emphasis on 'being seen', Gen Z also showed movement towards the prioritization of appearance perception, making this a cultural shift, not just a generational one.

How youth choose clothing: feeling vs. perception



Base: US respondents aged 11-24; 6,312 (2025) and 6,126 (2026)

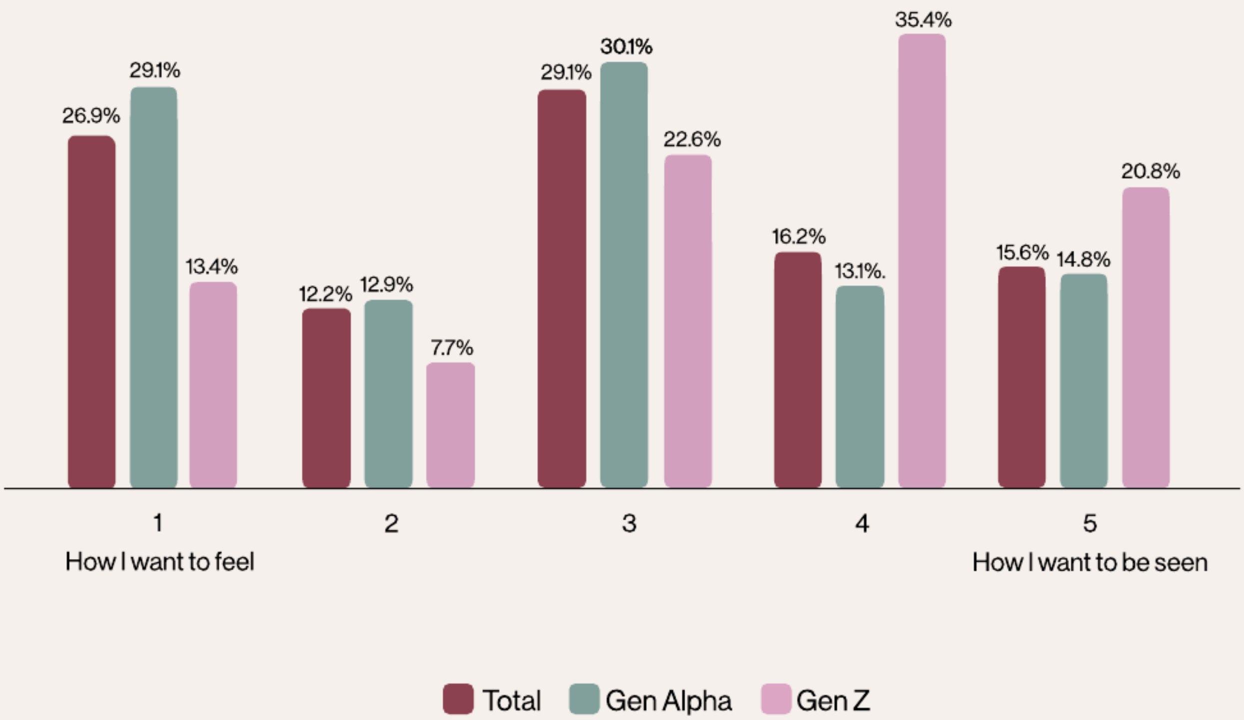
Gen Alpha ties appearance more to external identity

Gen Alpha's identity is still forming, making appearance a more immediate way to express who they are and how they fit in, leading to this demographic over indexing in terms of dressing in line with how they want to be seen.

This discrepancy is partly life stage related, but also attributable to environment, as Gen Alpha has grown up in a social media native world built around comparison and self-presentation.

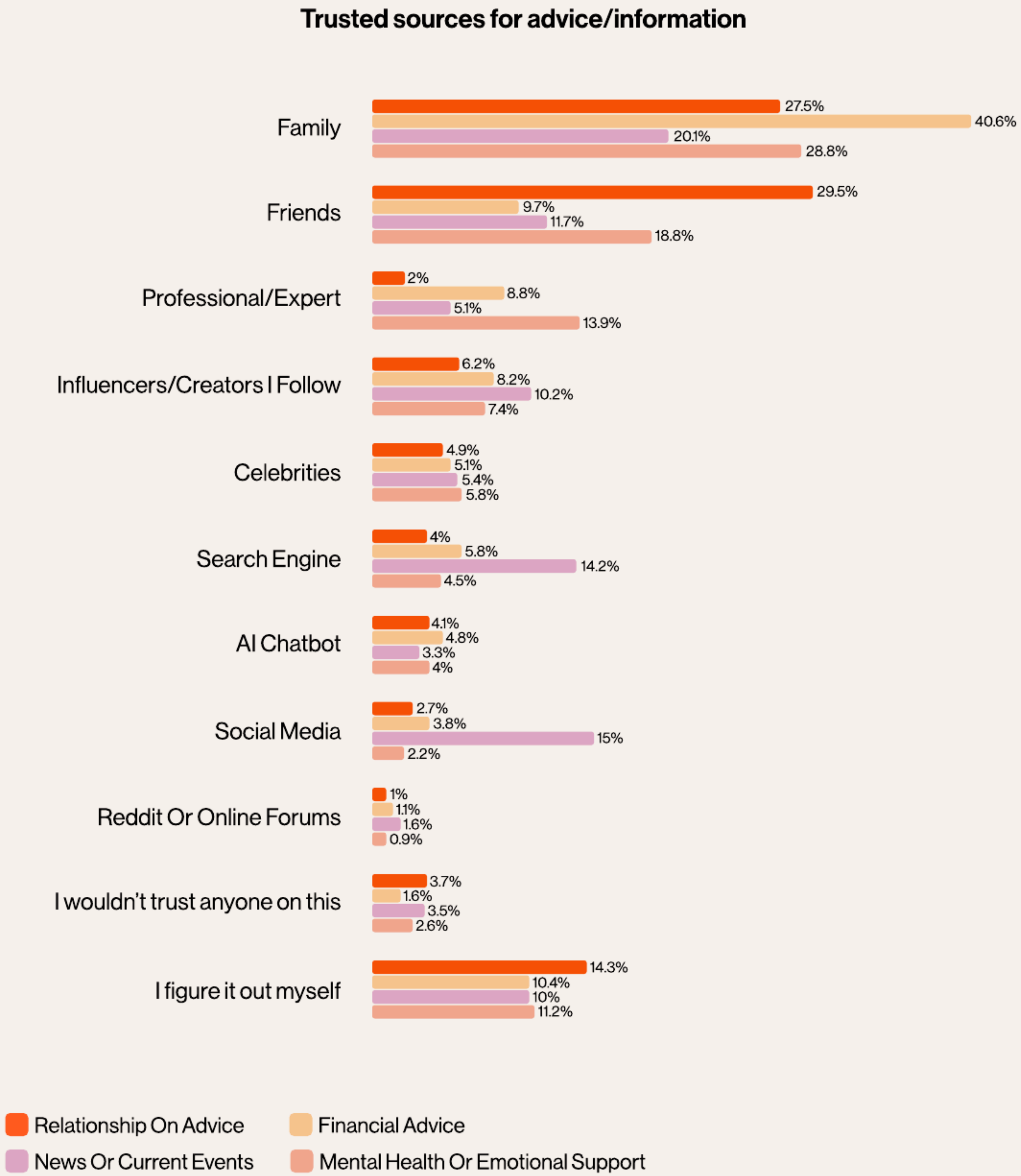
As a result, clothing and physical aesthetics carry more weight as a tool for achieving confidence at this age.

How youth choose clothing: feeling vs. perception



Base: 6,126 US respondents aged 11-24

Family remains the obvious go to for financial advice



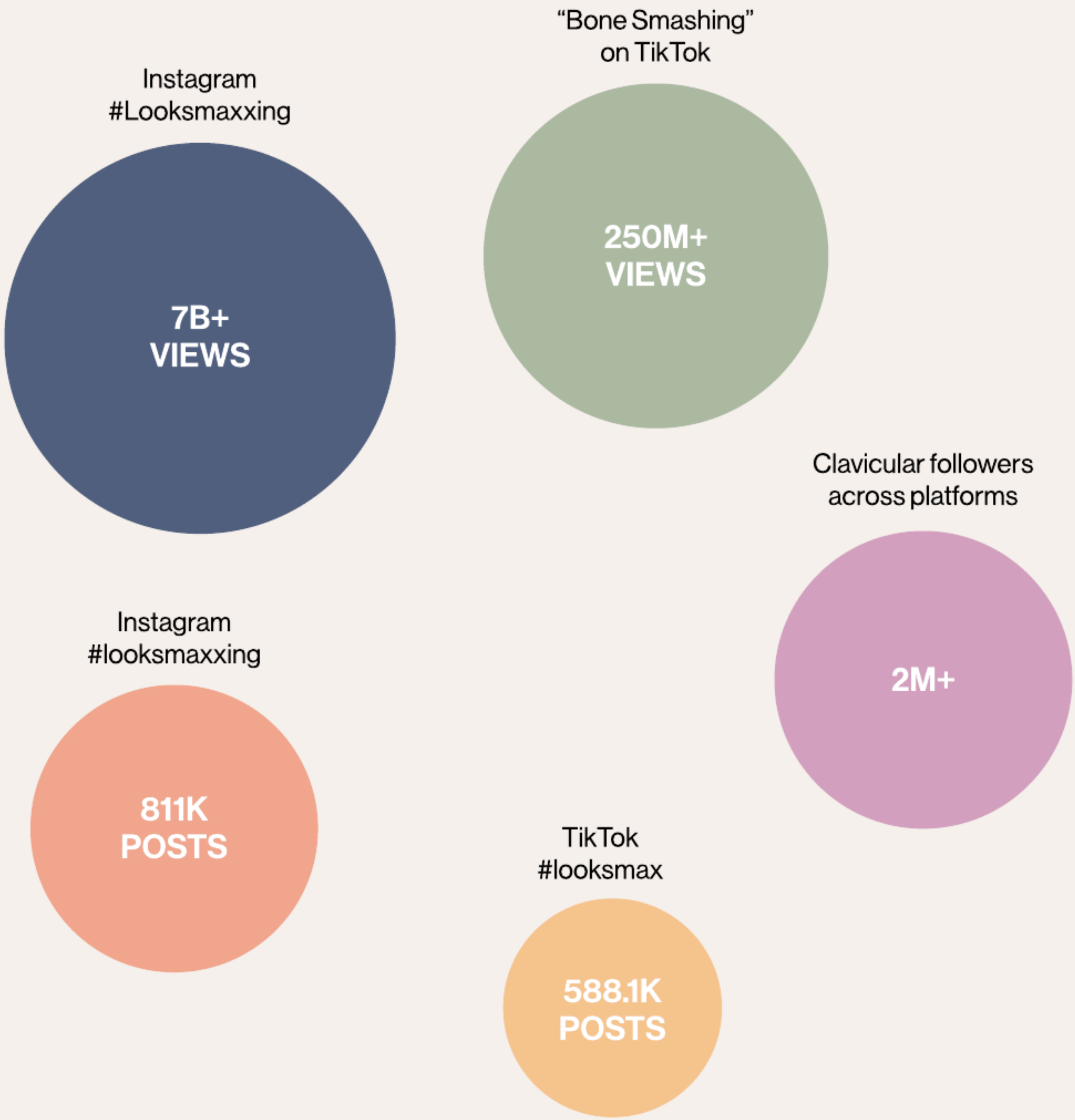
Base: 6,126 US respondents aged 11-24

The youth are surrounded by extreme appearance pressure

External appearance pressures surround the youth

The youth are inundated with content on looksmaxxing, physical alteration, and weight loss drugs across their favorite social media platforms. The popularity of these trends is especially impactful on Gen Alpha, who show more focus on their appearance and external image, and are at an age where they are comparatively more vulnerable to external influences

Base: TikTok and Instagram user statistics as of July 2026


Instagram
#Looksmaxxing
7B+
VIEWS
“Bone Smashing”
on TikTok
250M+
VIEWS
Clavicular followers
across platforms
2M+
Instagram
#looksmaxxing
811K
POSTS
TikTok
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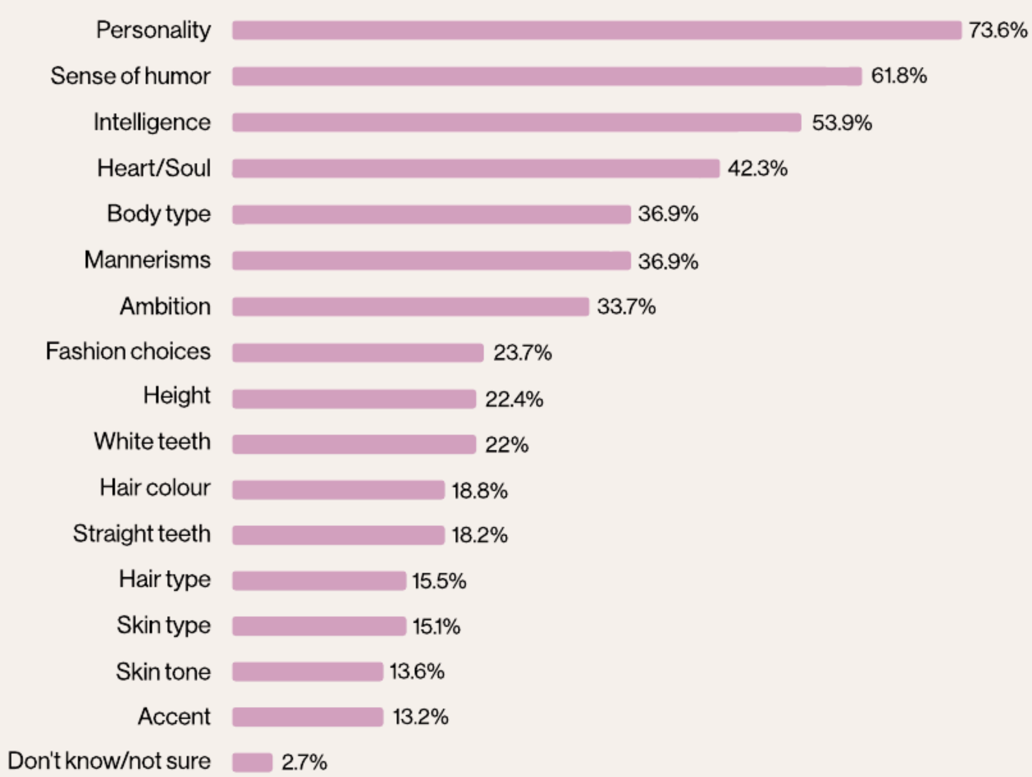
Factors most associated with attractiveness are non-aesthetic

Despite a rising focus on appearance, the youth reports defining attractiveness through personality, humor, intelligence, and other non-physical traits. This aligns with the fact that over a quarter of youth respondents claim they choose clothes based on how they want to feel, instead of how they want to be seen by others.

However, factors such as body type and fashion choices are not far behind in terms of proportion of youth respondents attributing them to attractiveness. This shows a polarization between what traits the youth value in theory, and the appearance pressures they feel they must navigate.

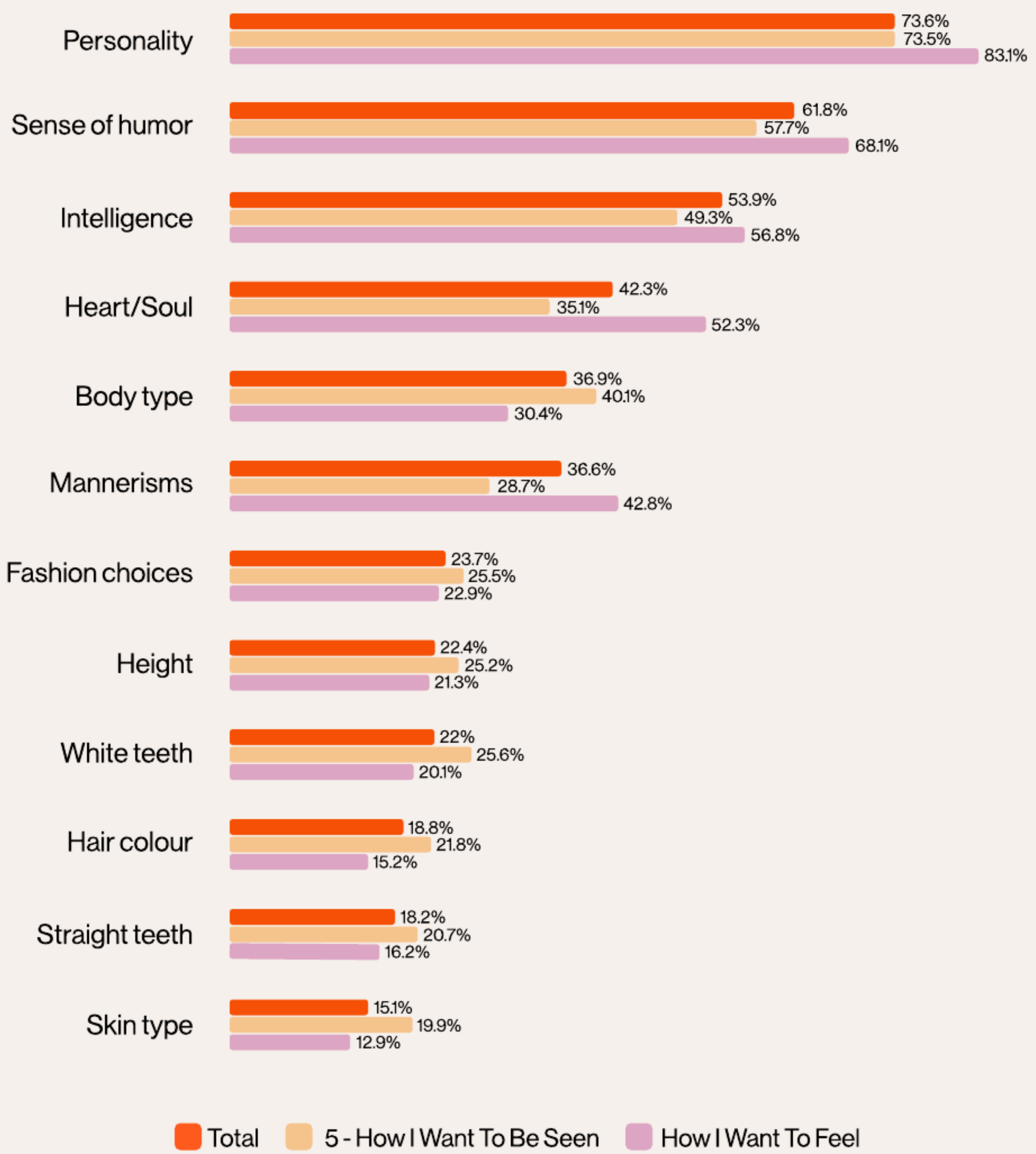
Most important factors in attractiveness



Base: 6,126 US respondents aged 11-24

Those who dress to be seen define attractiveness more visually

Definition of attractiveness among those who buy clothes based on how they want to feel vs. how they want to be seen



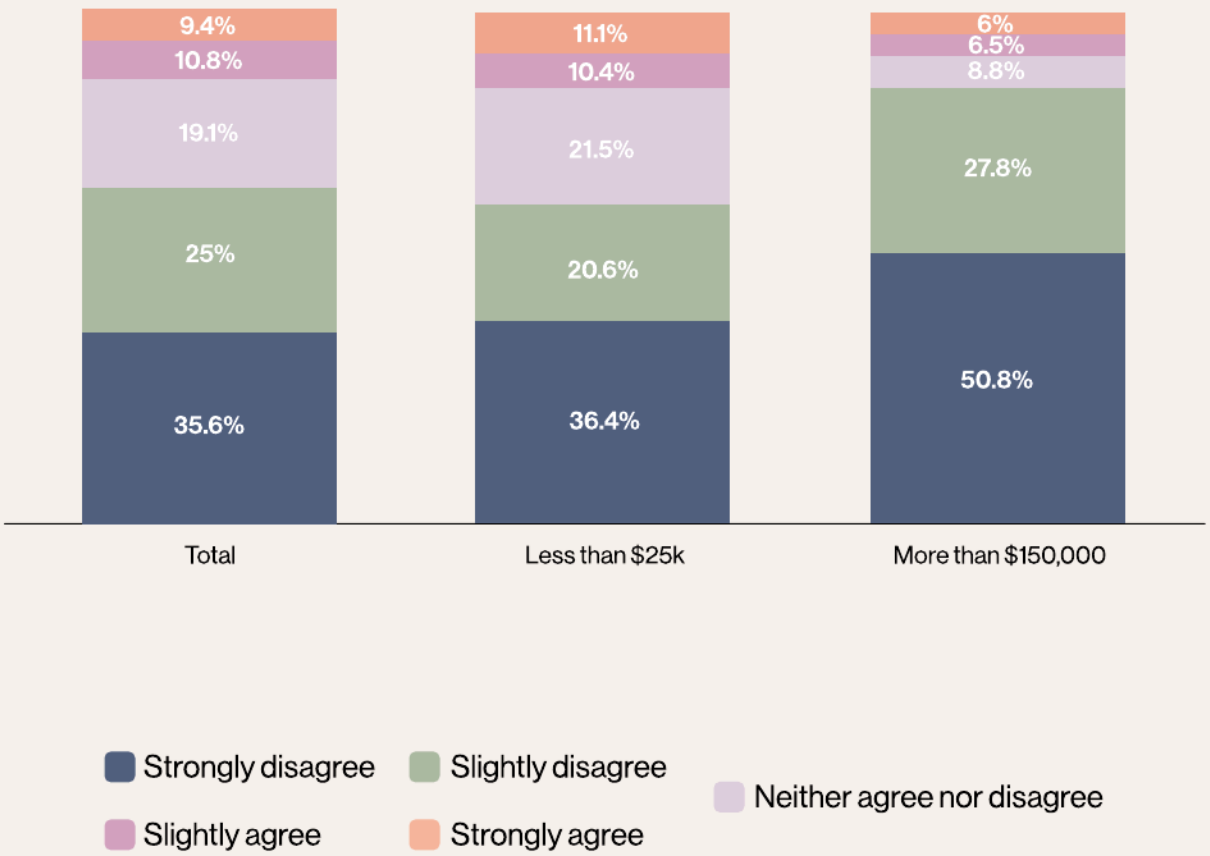
Base: 6,126 US respondents aged 11-24

More affluent households would swerve fast fashion if money weren't an object

Fast fashion is often an accessible avenue for trend access, even though for some, it is not the ideal choice due to quality and sustainability concerns, as well as guilt associated with making these purchases.

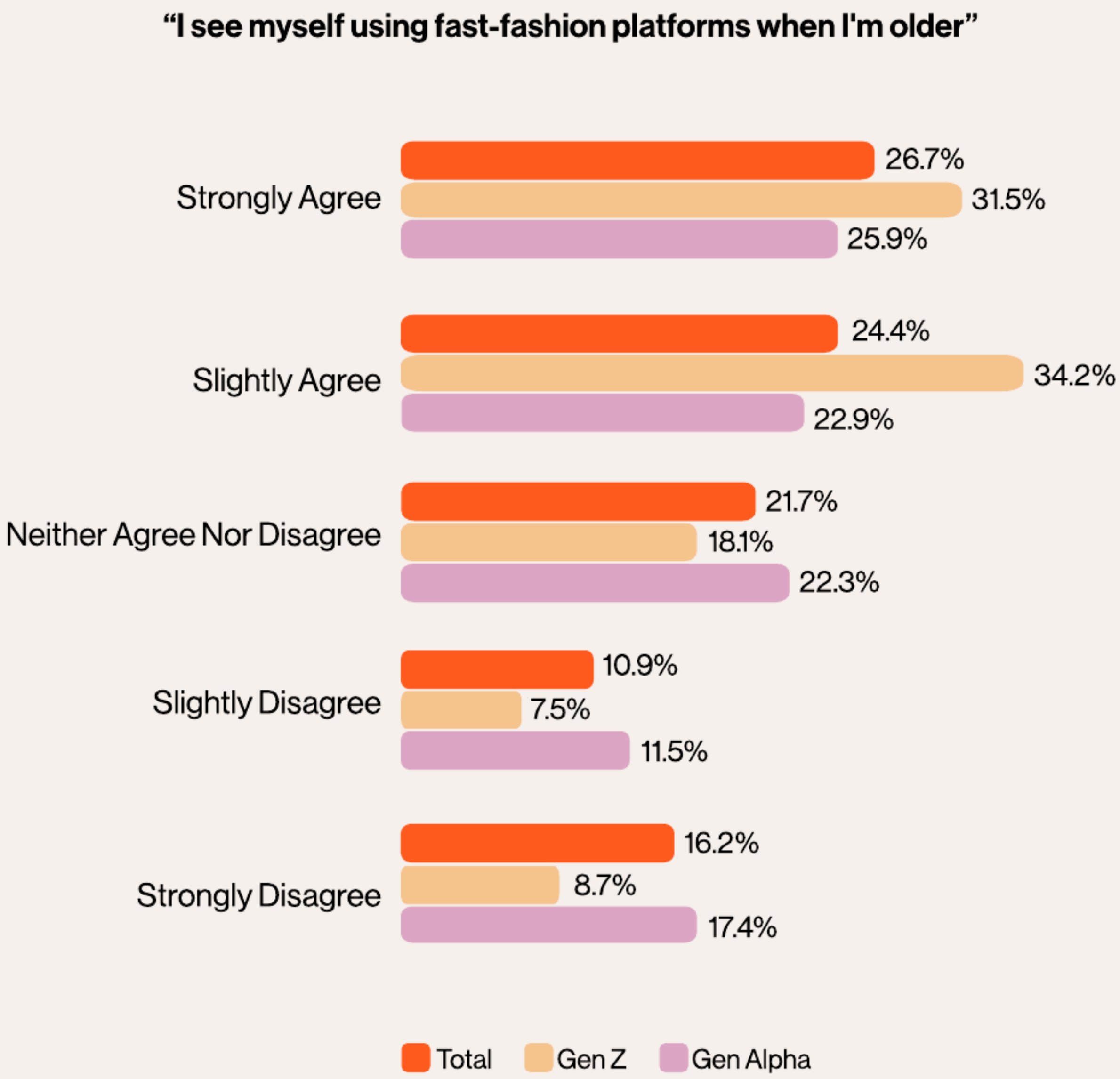
One in five of the youth would still shop fast fashion if they had access to unlimited money, a percentage that drops for youth respondents from more affluent households. This disparity indicates that fast fashion popularity is reinforced by accessibility and price leadership but loses relevance as income levels and subsequent access to higher end items rises.

“If I had all the money in the world I wouldn't shop fast fashion”



Base: 3,884 US respondents aged 11-24 who have shopped fast fashion in the past

Gen Alpha sees themselves using fast fashion going forward

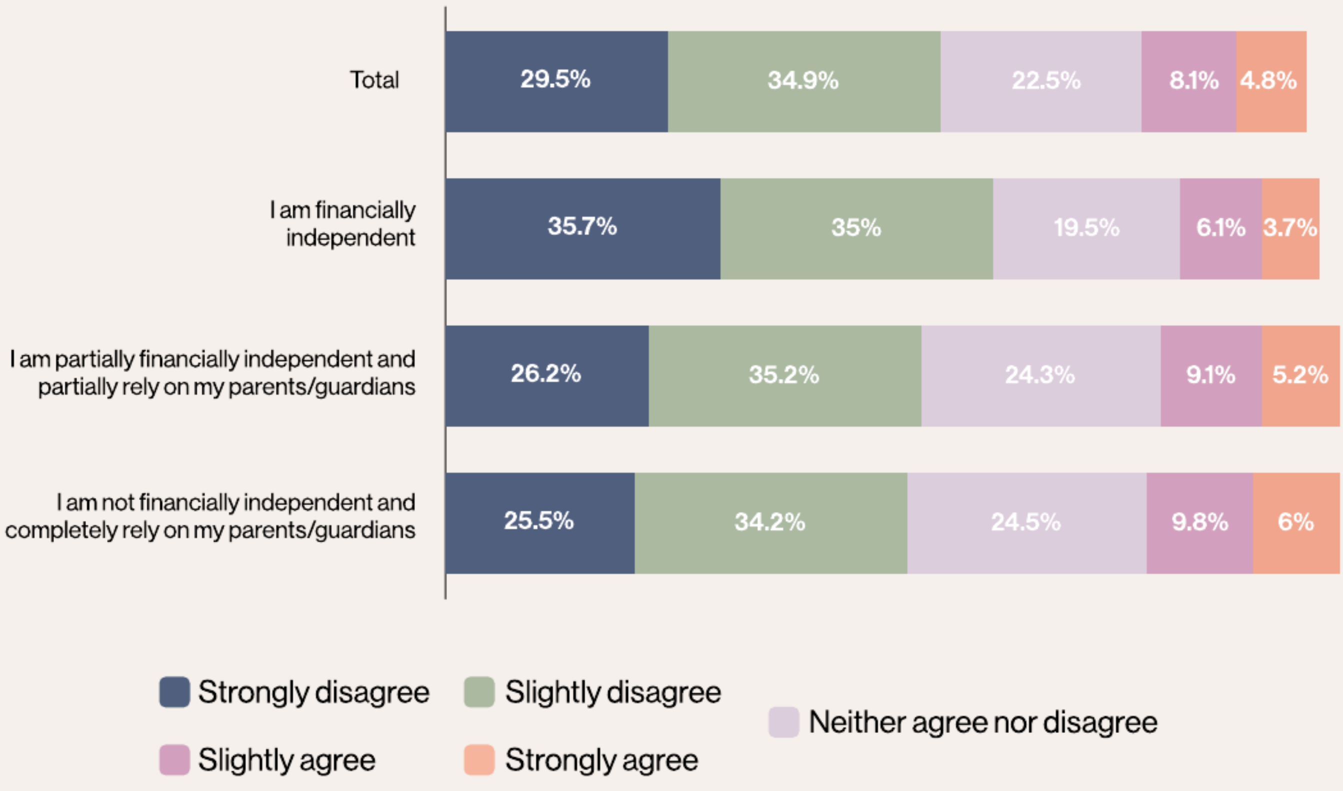


Base: 6,126 US respondents aged 11-24

Financially independent respondents are more likely to agree fast fashion is worth it

Once shoppers are managing their own finances, the value of speed, price, and convenience become more tangible, and the benefits of fast fashion become more pronounced. The youth recognise that fast-fashion may not deliver the perfect product, but in practice, its benefits are hard to ignore. Individuals are more willing to pay the "guilt tax" associated with fast fashion when their own discretionary income is on the line.

"I think the benefits of shopping fast fashion make it worth it"

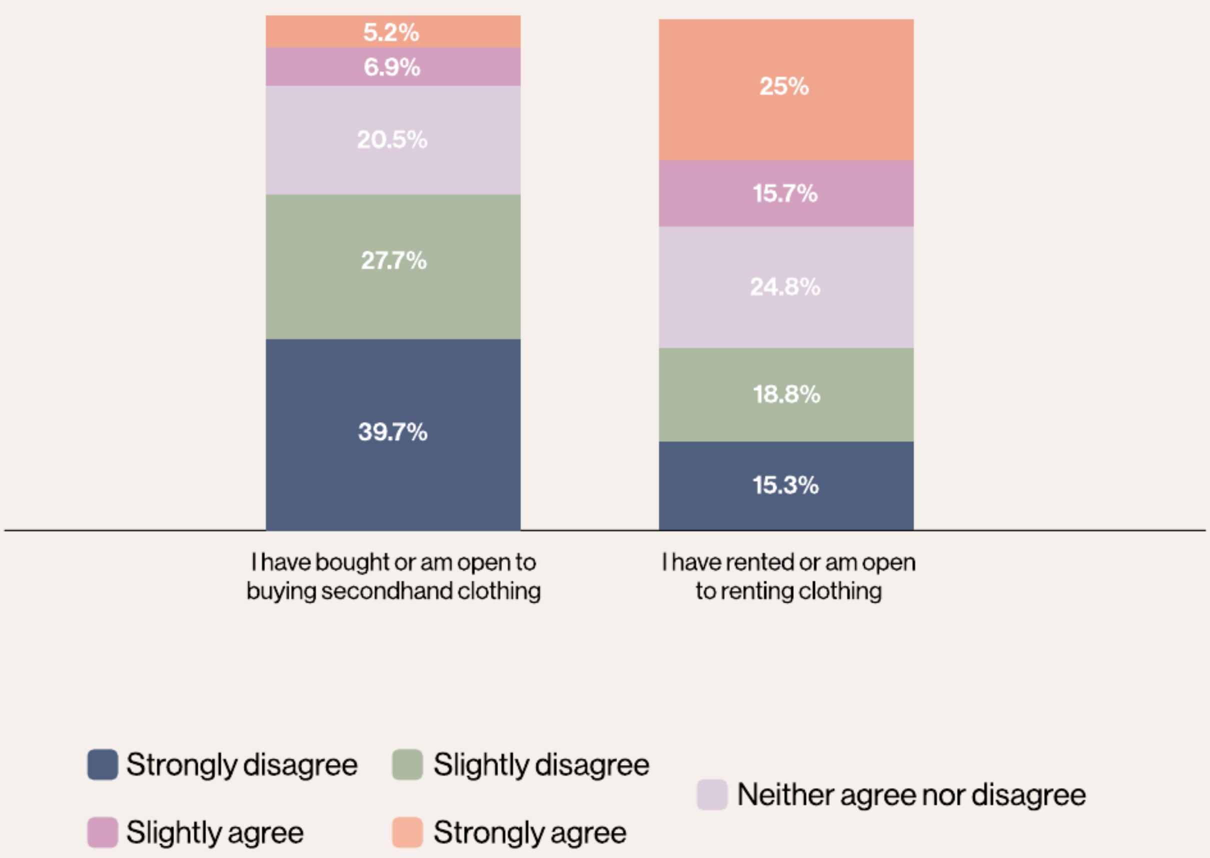


Base: 3,884 US respondents aged 11-24 who have shopped fast fashion in the past

Secondhand clothing shows mainstream appeal while clothing rentals lag

Secondhand clothing and clothing rentals are two key evolving trends in the fashion world, with secondhand clothing showing much more appeal to the youth than clothing rentals. This data shows the youth are open to alternative fashion models that save them money, but only when they feel familiar, flexible, and easy to use.

Secondhand clothing and clothing rentals: willingness to adopt



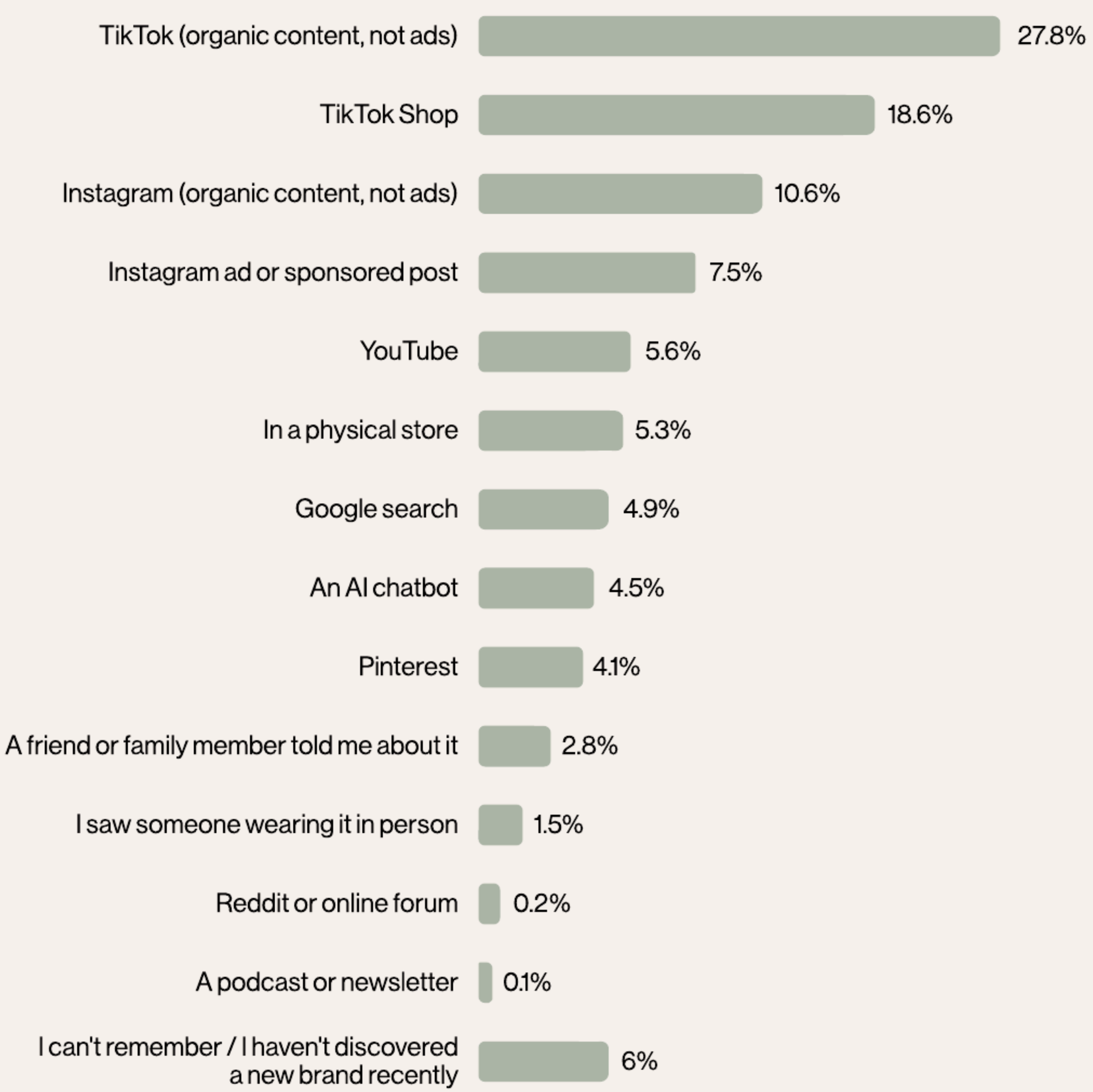
Base: 6,126 US respondents aged 11-24

Discovery

→ Insights into methods of discovery among the youth

TikTok is a dominant force when it comes to discovery

Initial discovery of new clothing or fashion brands

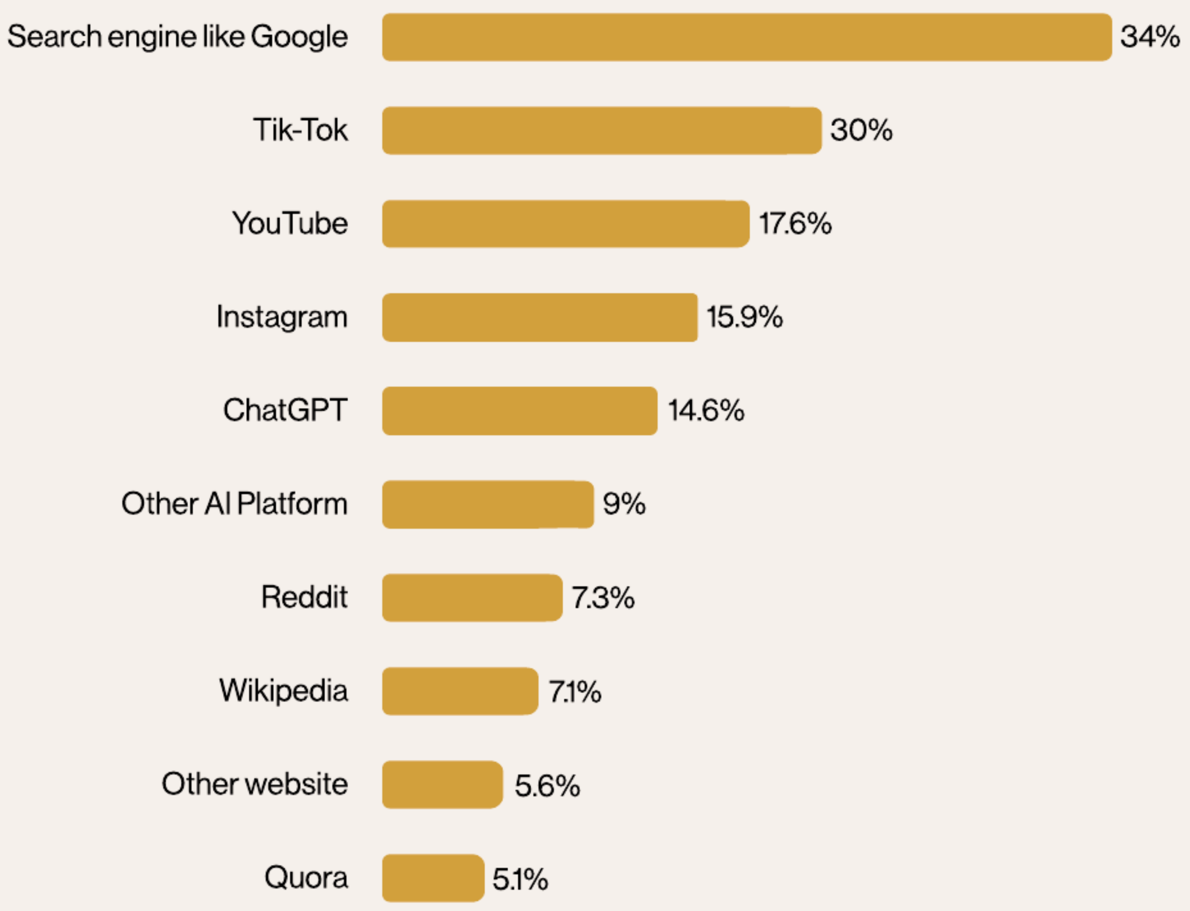


Base: 6,126 US respondents aged 11-24

TikTok is a key go-to when it comes to looking something up

Just over a third of the youth turn to search engines like Google in the first instance when looking something up, while 30% turn to TikTok. A preference for TikTok over other platforms such as Reddit or ChatGPT supports the idea that the youth don't just want answers, they want guidance and options with visual examples, combined with peer validation. For both brands and retailers, this means that visibility is shifting from search results to discovery feeds, where new platforms and creators are driving discovery.

First stop for "look ups"



Base: 6,126 US respondents aged 11-24

Note: the data represents the proportion of the youth who ranked each platform number one in terms of where to look stuff up.

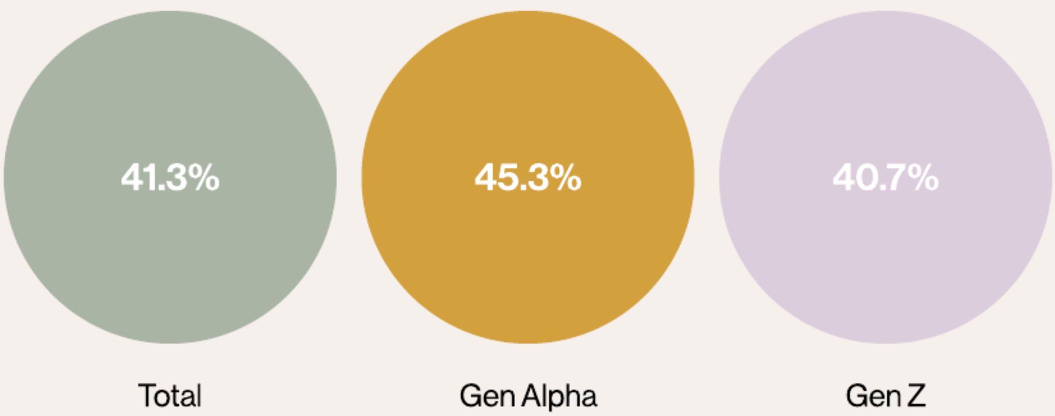
Almost half of Gen Alpha turns to AI for help with homework

AI use for homework is already commonplace among the youth, particularly Gen Alpha with almost half of respondents within this demographic claiming to have leveraged Artificial Intelligence for help with homework within the past 12 months.

This data reinforces the narrative that the youth are open to using AI when it comes to aiding them with simple, impersonal tasks. However, when it comes to more thoughtful activities, the youth are far less comfortable in receiving support from AI. For example, end-to-end shopping or having final sign off on a clothing purchase – for activities such as these, the human opinion is still very much positioned as far more valuable than anything AI can offer.

"It would be great if AI could help me with my homework faster" – Male, 14

"...a lot of the younger generation is addicted to using AI to do their homework and for other things, so if that were to happen, they wouldn't know how to do their homework the old-fashioned way, with textbooks" – Female, 18

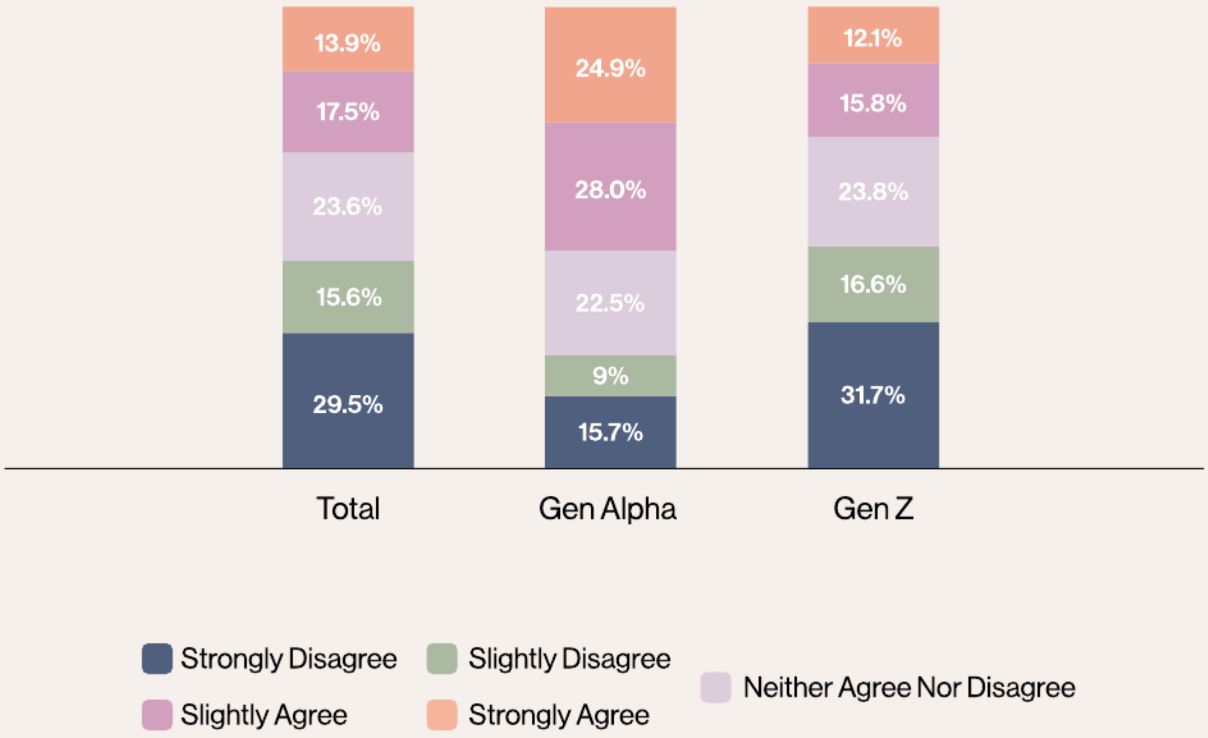


Base: 6,126 US respondents aged 11-24

More than half of Gen Alpha can't imagine life without AI

Gen Alpha responses indicate strong AI reliance, suggesting AI usage has become part of their daily operating system rather than an occasional tool. AI usage has penetrated school and career applications and is beginning to find use cases in shopping and recommendation processes. For brands and retailers, this reliance signals a shift from AI being a useful add-in feature across things like websites to being more about complementing the retail experience in terms of things like discovery, and aiding price comparison behaviors, as well as the purchase experience more generally.

"I cannot imagine life without AI"



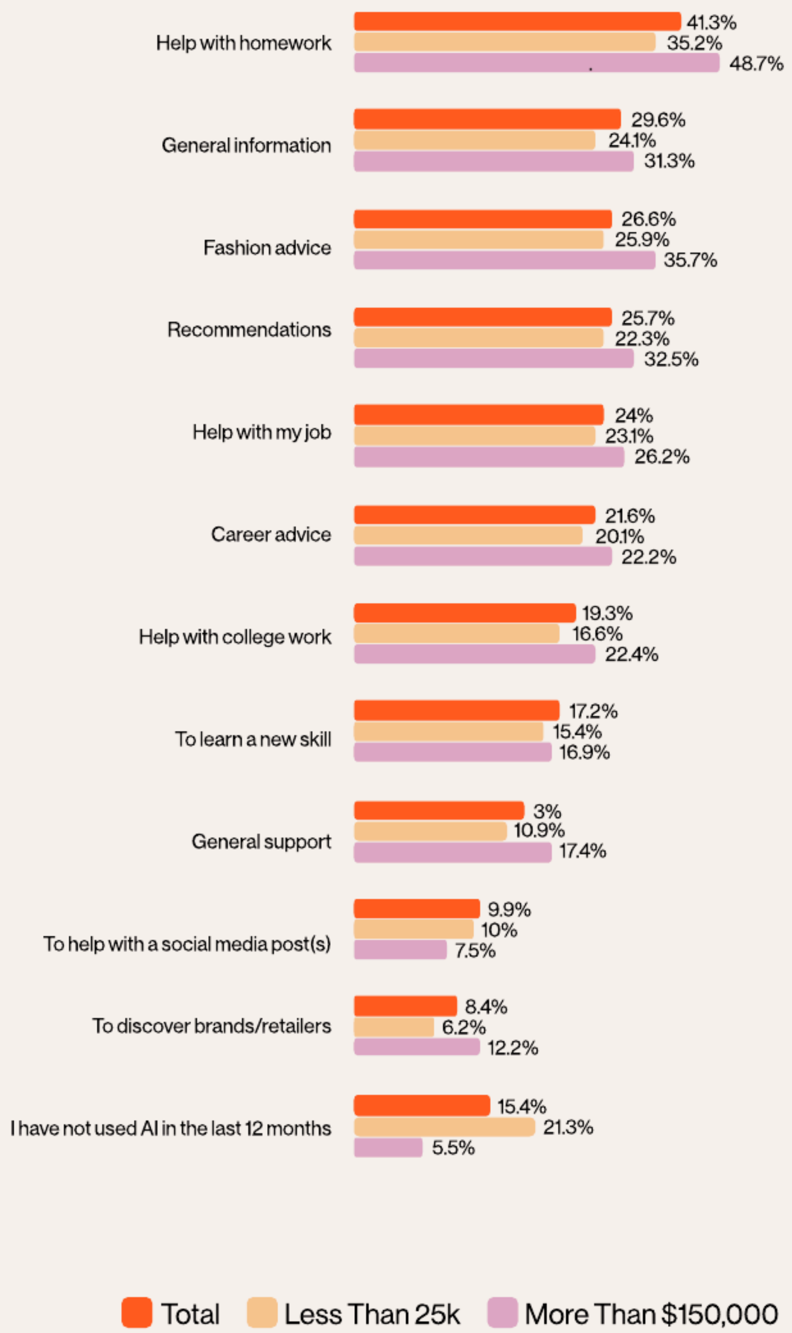
Base: 6,126 US respondents aged 11-24

AI could further the wealth divide

Respondents from more affluent households better leverage AI

The youth who are from more financially comfortable backgrounds over index when it comes to AI use cases. While this is in-part due to accessibility, with some platforms requiring a monthly subscription for access to premium features, this poses challenges in terms of exacerbating a wealth divide. Many companies are investing in AI capabilities, with individuals who can work alongside AI instead of against it, likely to succeed.

Reasons for using AI

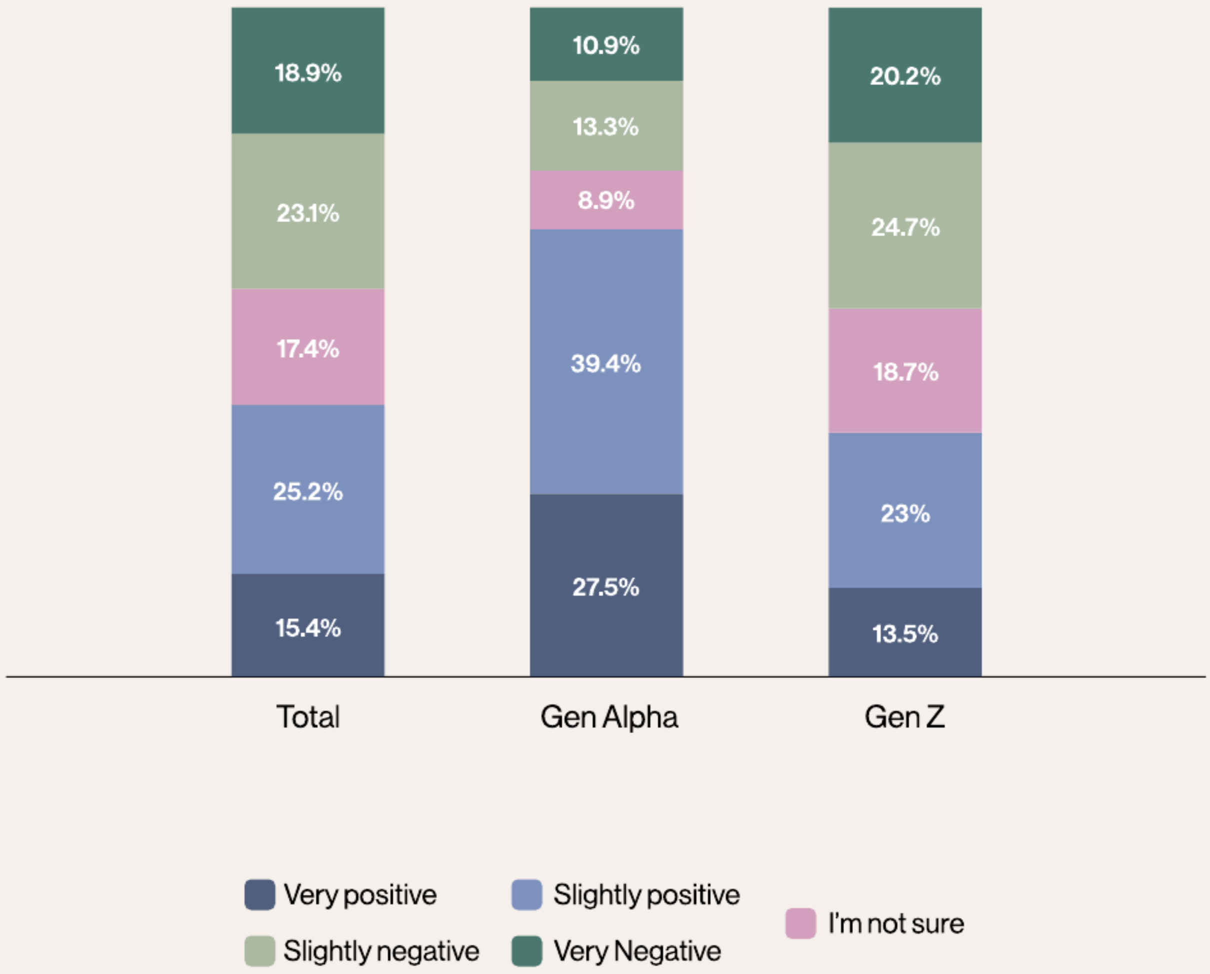


Base: 6,126 US respondents aged 11-24

Gen Alpha holds a much more positive outlook on AI than Gen Z

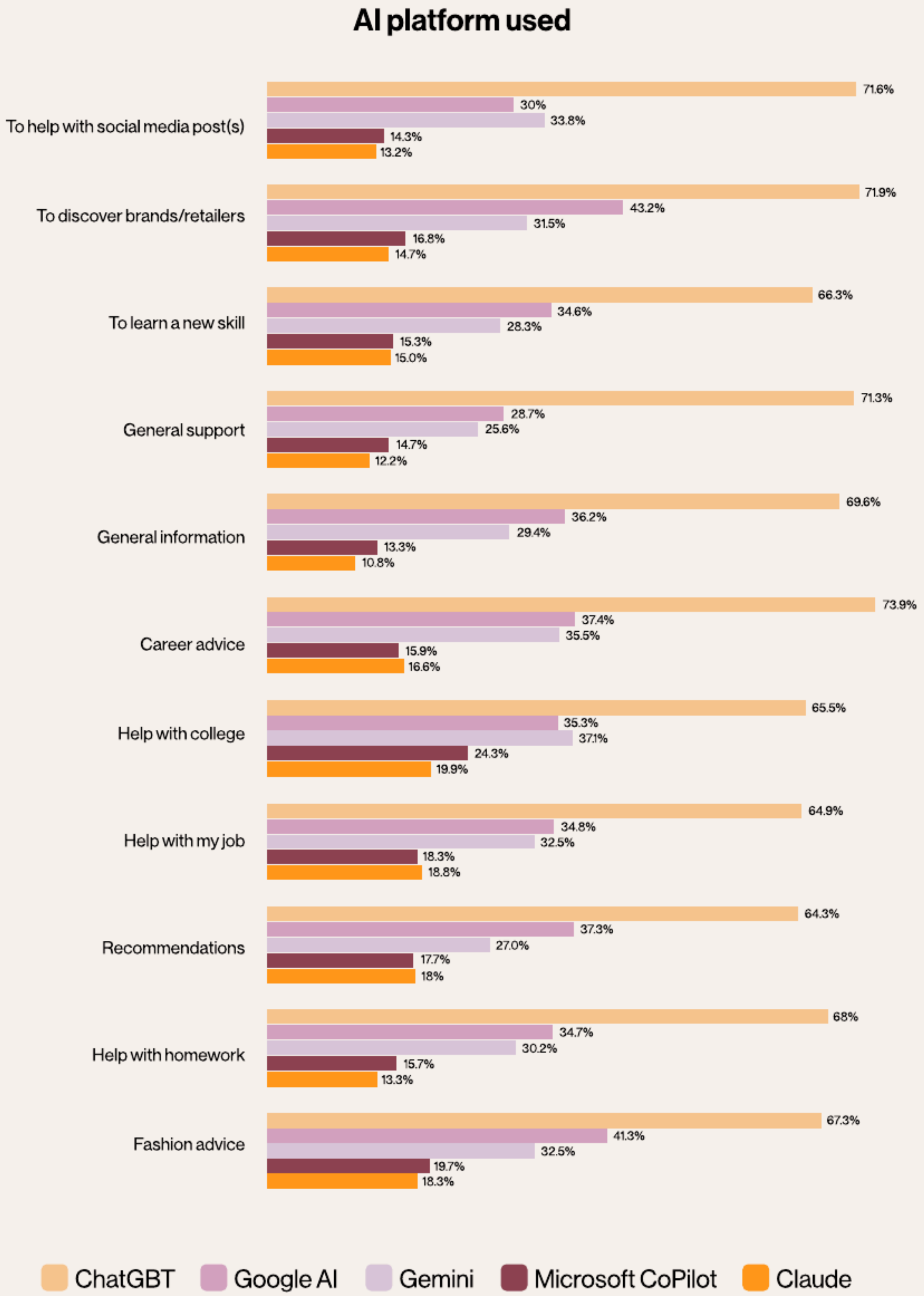
Optimism over the future of AI is polarized when considering both Gen Alpha and Gen Z respondents, with Gen Alpha much more likely to think AI will have a positive impact on their careers. A lack of optimism among Gen Z can be in-part attributed to the fact that they have more experience in the workforce, of which AI is becoming increasingly embedded, and therefore demonstrate elevated skepticism about the applications, uses, and impacts of AI longer-term. Whereas, in the case of Gen Alpha, having grown up with AI more embedded in daily life, they are more likely to view AI through the lens of convenience and possibility, rather than as a disruptive force.

“Thinking about your career, do you think AI will have a positive or negative impact"



Base: 6,126 US respondents aged 11-24

ChatGPT is far more established than other AI platforms

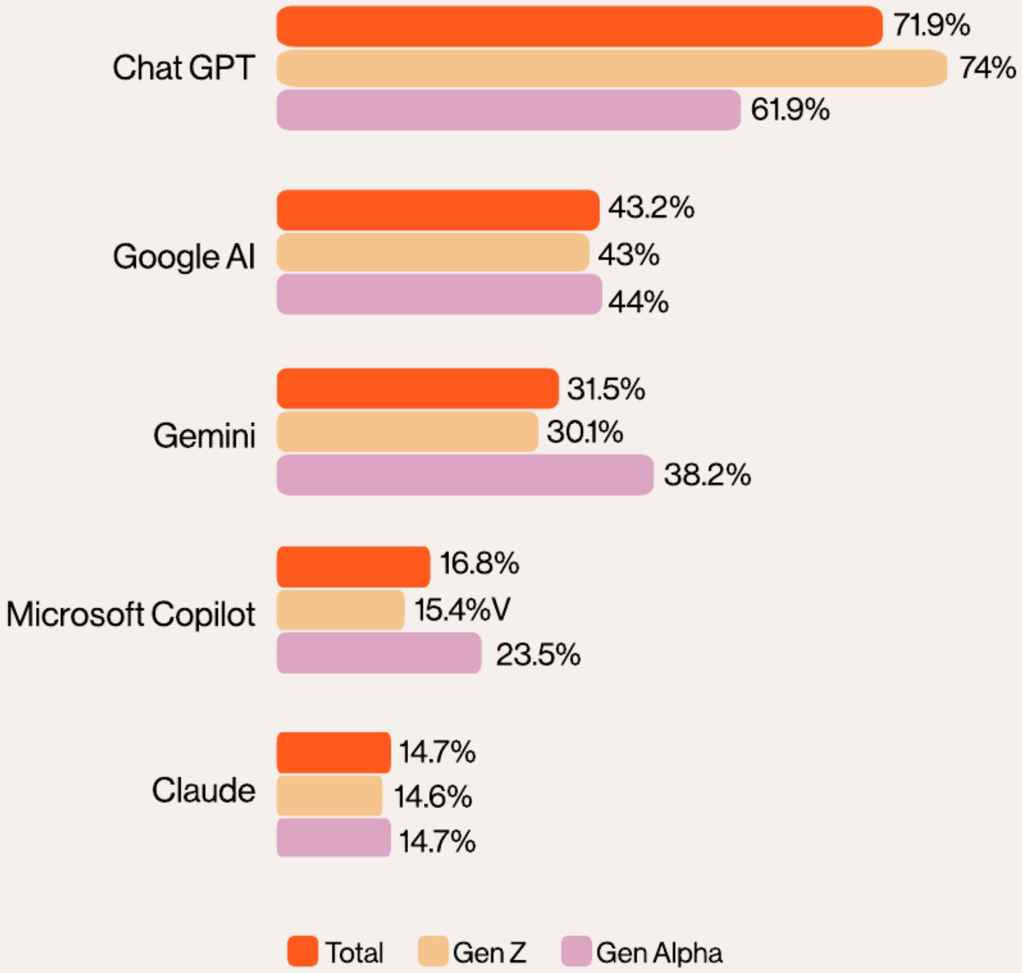


Base: 5,131 US respondents aged 11-24 who have used AI in the past 12 months

Gen Alpha are more versatile when it comes to AI-led discovery

While Chat GPT is the most used platform in general, as well as specifically in relation to discovering brands/retailers, Gen Alpha are much more versatile in their approach. Gen Alpha are more likely to be using Gemini and Microsoft Copilot for brand/retailer discovery, with this reflecting the fact that this demographic are generally more engaged with AI. Given their comparatively younger age, these technologies have played a role in their day-to-day for a greater portion of their more conscious years compared with Gen Z, and therefore this age group are more open to experimenting with different platforms.

AI platforms used for discovering brands/retailers



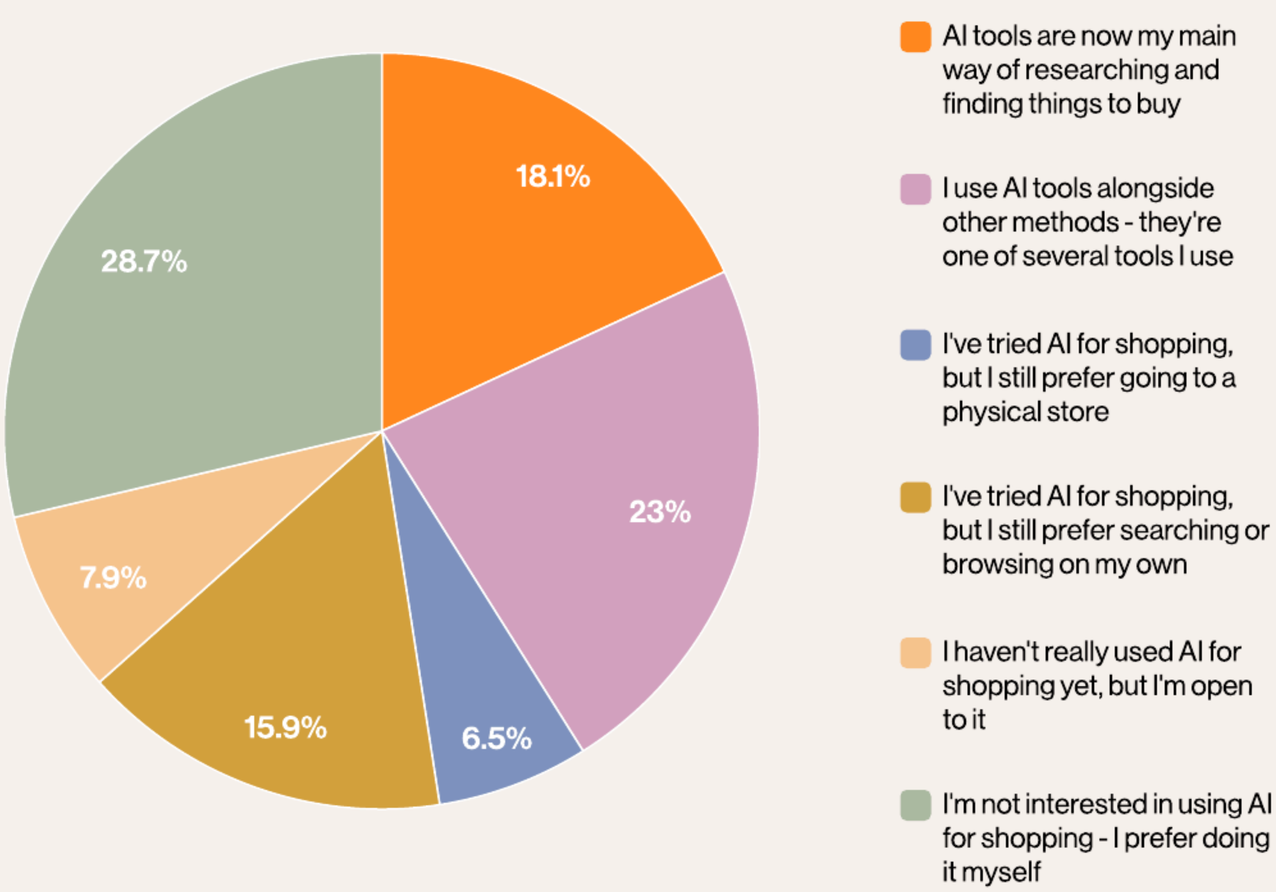
Base: 6,126 US respondents aged 11-24

Almost three quarters of the youth have already used or are open to using AI for shopping

AI already has broad permission to help with shopping-related tasks, with just under three quarters of the youth reporting having either used AI or being open to using it for discovery and research. Although AI has permission to assist with shopping, it does not have permission to take over, as many people who use/have used AI prefer to use it as one tool in their tool kit, not the sole engine.

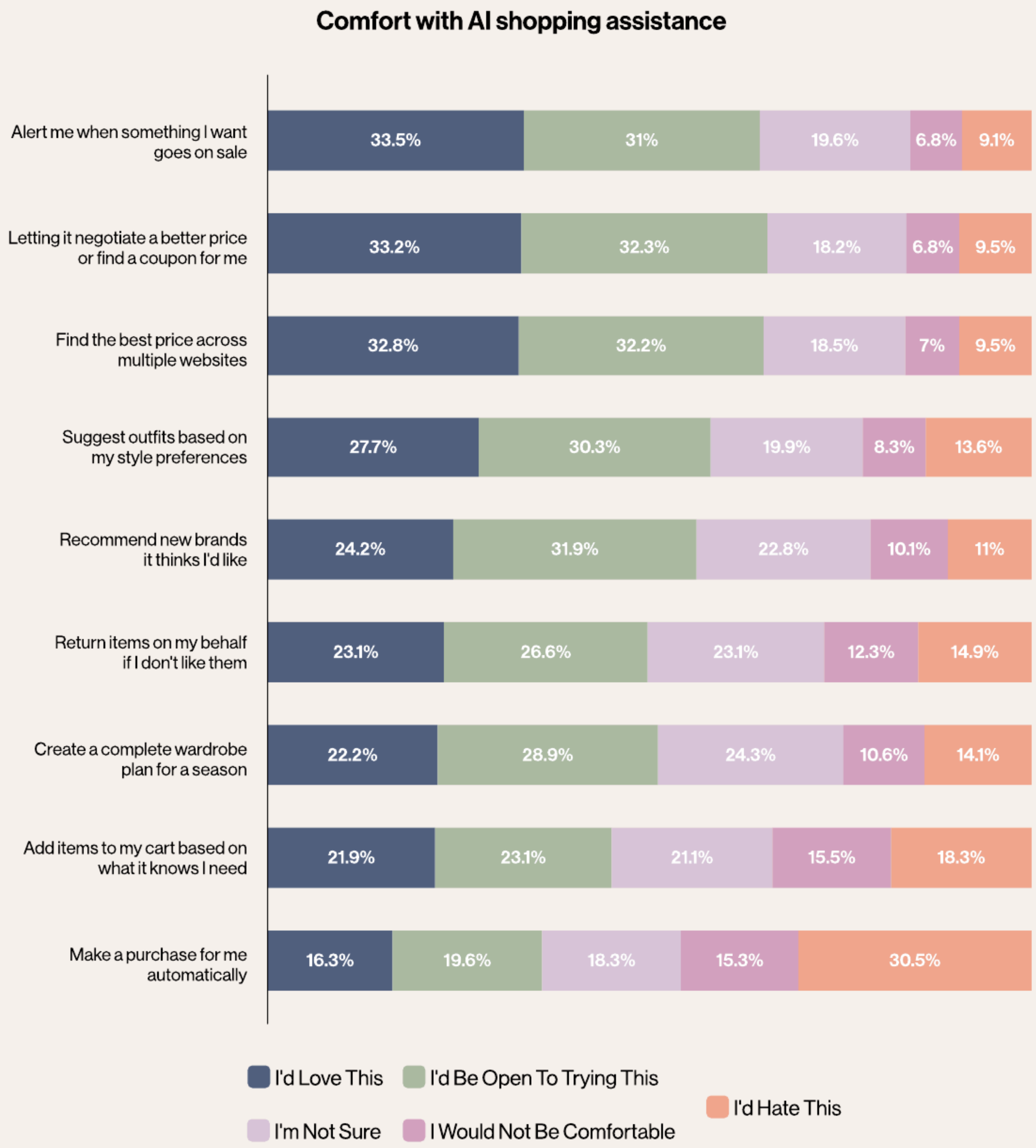
When it comes to processes the youth enjoy, such as end-to-end shopping, or meaningful experiences like receiving style advice, there is a real lack of comfort with AI adoption. This narrative is further underpinned by the fact that main use cases for AI during the shopper journey were in areas such as checking if a product is worth buying or finding the best price.

Role of AI tools in the shopper journey



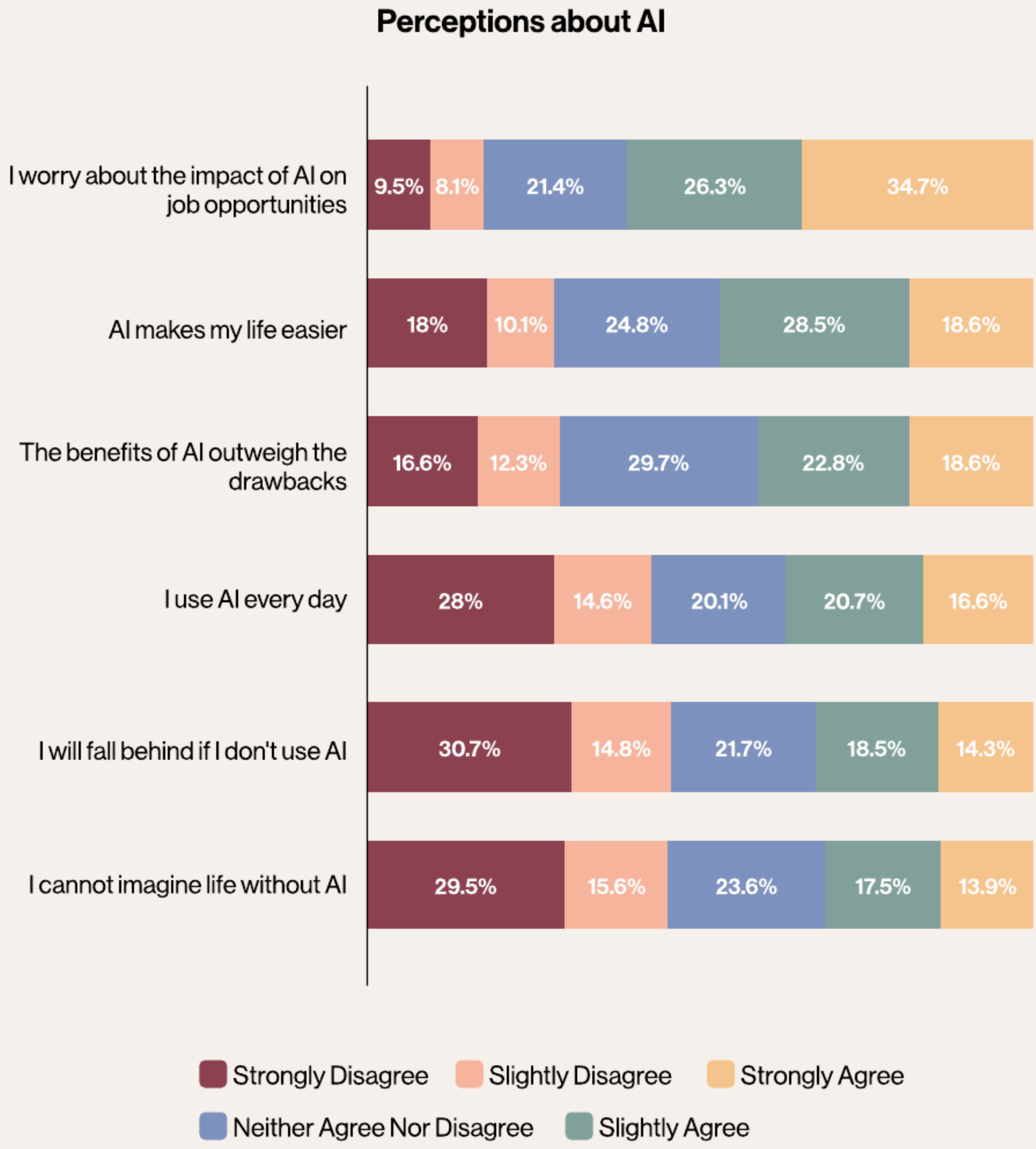
Base: 6,126 US respondents aged 11-24

AI should complement the retail experience, not control it



Base: 6,126 US respondents aged 11-24

Concerns persist around the impact of AI on job opportunities



Base: 6,126 US respondents aged 11-24

Social Media

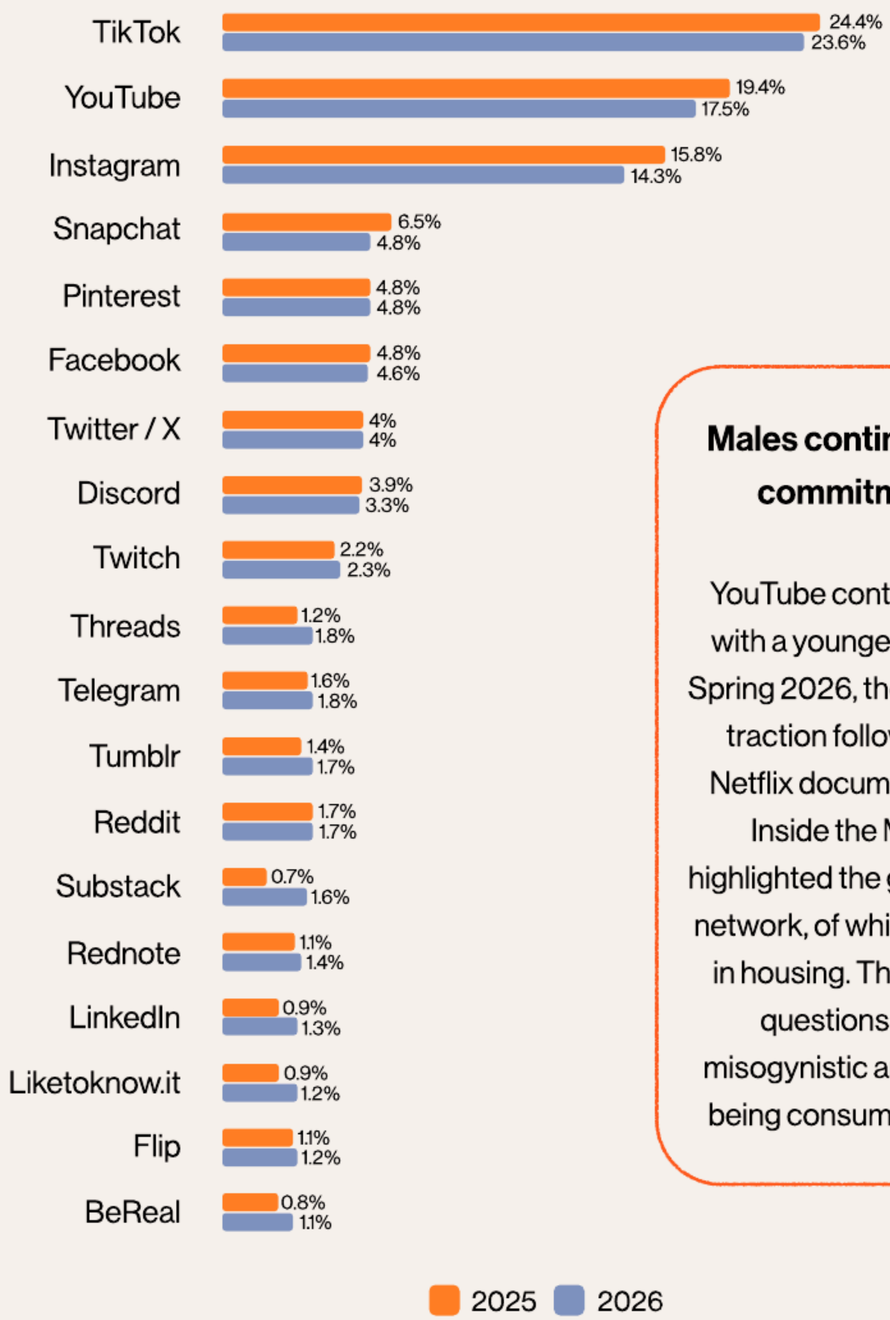
→ Insights into social media trends among the youth


PACSU
EST. 1980

TikTok remains the firm favorite

While TikTok remains the preferred platform overall, a gender divide exists in terms of platform preferences.

Social media platforms the youth can't live without



Males continue to show greater commitment to YouTube

YouTube continues to prove popular with a younger, male audience. As of Spring 2026, the platform gained media traction following Louis Theroux's Netflix documentary 'Louis Theroux: Inside the Manosphere' which highlighted the growing ultra-masculine network, of which YouTube plays a role in housing. The documentary raised questions as to the wealth of misogynistic and antifeminist content being consumed by the youth online.

Base: US respondents aged 11-24; 6,312 (2025) and 6,126 (2026)

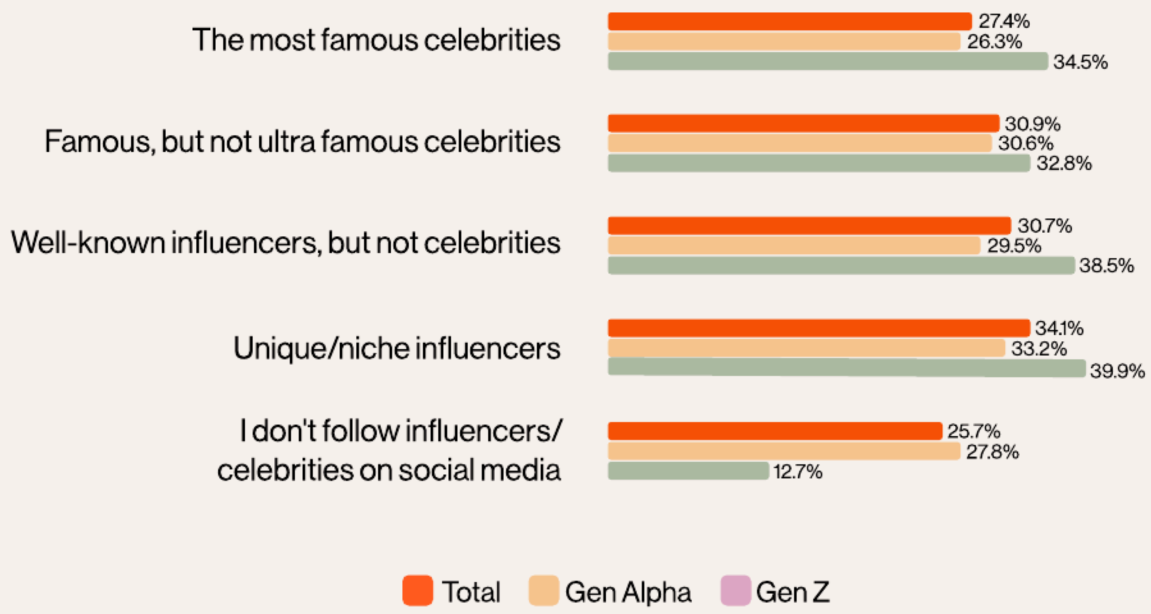
Individualism priorities hinder the influencer pull among Gen Z

In Pacsun Youth Report 2025, a key theme that emerged was the fact that there is a general reluctance to be molded by external influences, particularly among Gen Z, as 32% claimed that they themselves have the biggest influence on how they think, feel, or make decisions.

This theme held true this year, as Gen Z demonstrates a greater reluctance to follow celebrities or influencers on social media. If they do follow these individuals, they are most likely to be unique/niche influencers (33.2%). This, once again, highlights the fact that Gen Z are continuously striving to be different.

Despite this, the most common favorite influencers/celebrities mentioned among Gen Z were: Mr Beast, Zendaya, Emma Chamberlain, Taylor Swift, and Kylie Jenner. While this is in-part inevitable due to these individuals being more famous generally and therefore more commonly mentioned, it also works in counter to the below data.

Influencers of preference to follow on social media



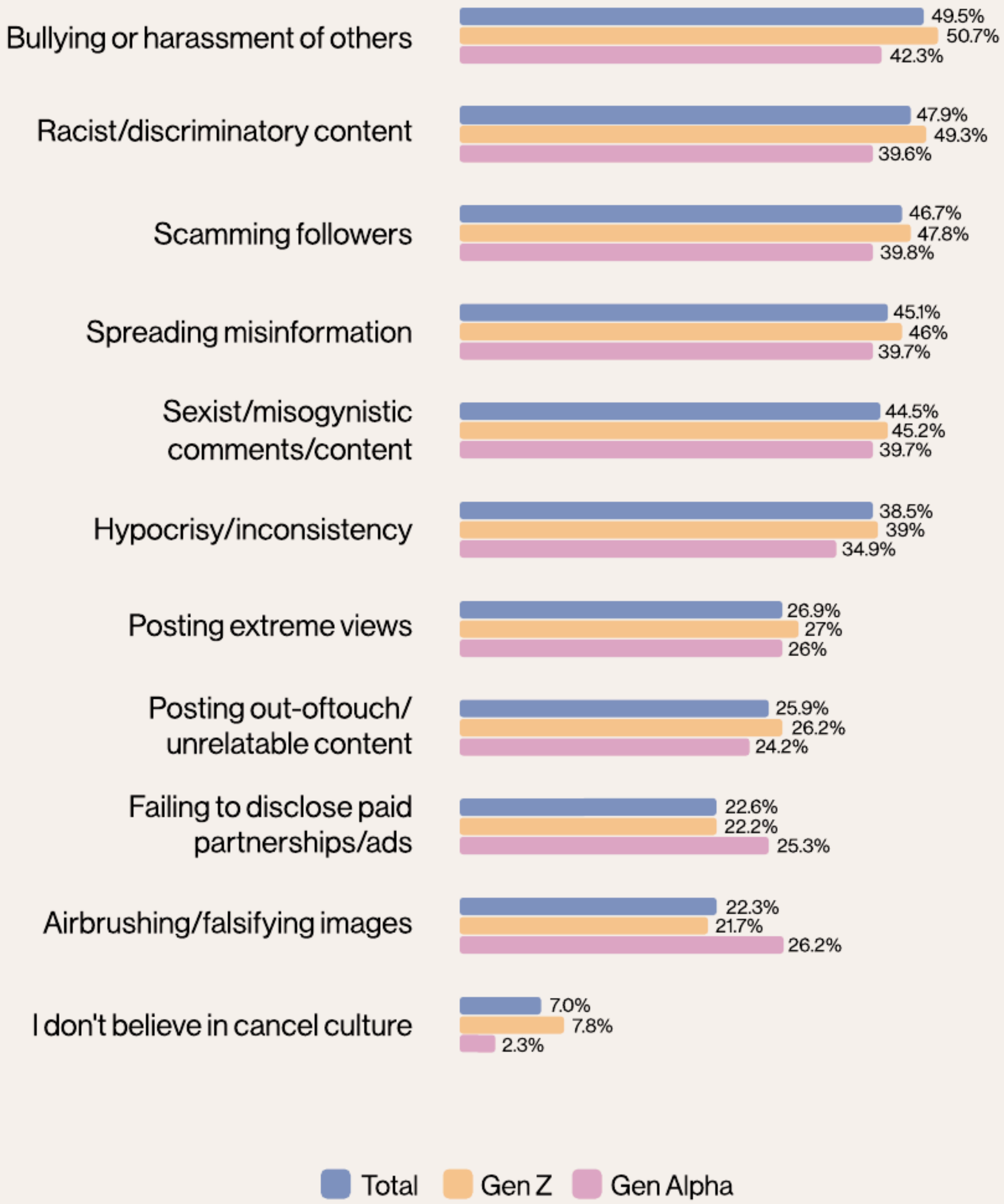
Base: 6,126 US respondents aged 11-24

Cancel culture remains strong. Almost half of the youth would unfollow influencers based on bullying, racist content, or scamming.

Gen Z exhibits contradictory behaviors

While Gen Z are more likely to claim they don't engage in cancel culture, they are also more likely than Gen Alpha to unfollow influencers across almost all reasons surveyed.

Behaviors which would encourage unfollowing of influencers



Base: 6,126 US respondents aged 11-24

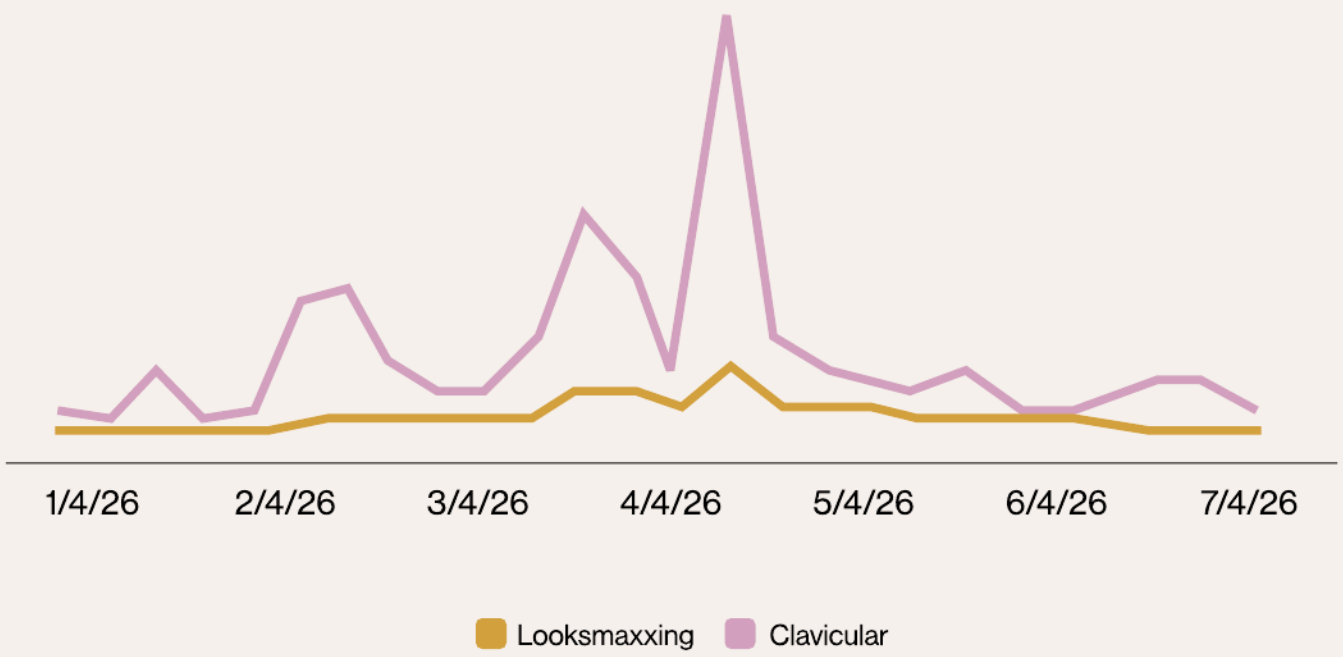
Influencers should tread carefully in terms of being unique, without being canceled

The youth prefer to follow unique/niche influencers, but influencers need to be wary about just how unique their content is, to avoid getting canceled.

While not niche in terms of following, Clavicular, who has amassed 1.1m followers on TikTok as of July 2026 and 903k on Instagram, is renowned for his unique content, making him popular among the youth. Clavicular, a key figure in the 'looksmaxxing' trend – an online self-improvement practice rooted in the manosphere and focused on maximizing physical attractiveness – is no stranger to media controversy.

Google Trends data points to spikes in traction around Clavicular.

In April of this year, he was hospitalized in Miami after a suspected overdose which was broadcast during a livestream, before then being charged for shooting an alligator the following month. While Clavicular has somehow gained status for being "uncancelable", other influencers have found themselves in the firing line for posting extreme content.



Source: Google Trends Data, 2026

Finances

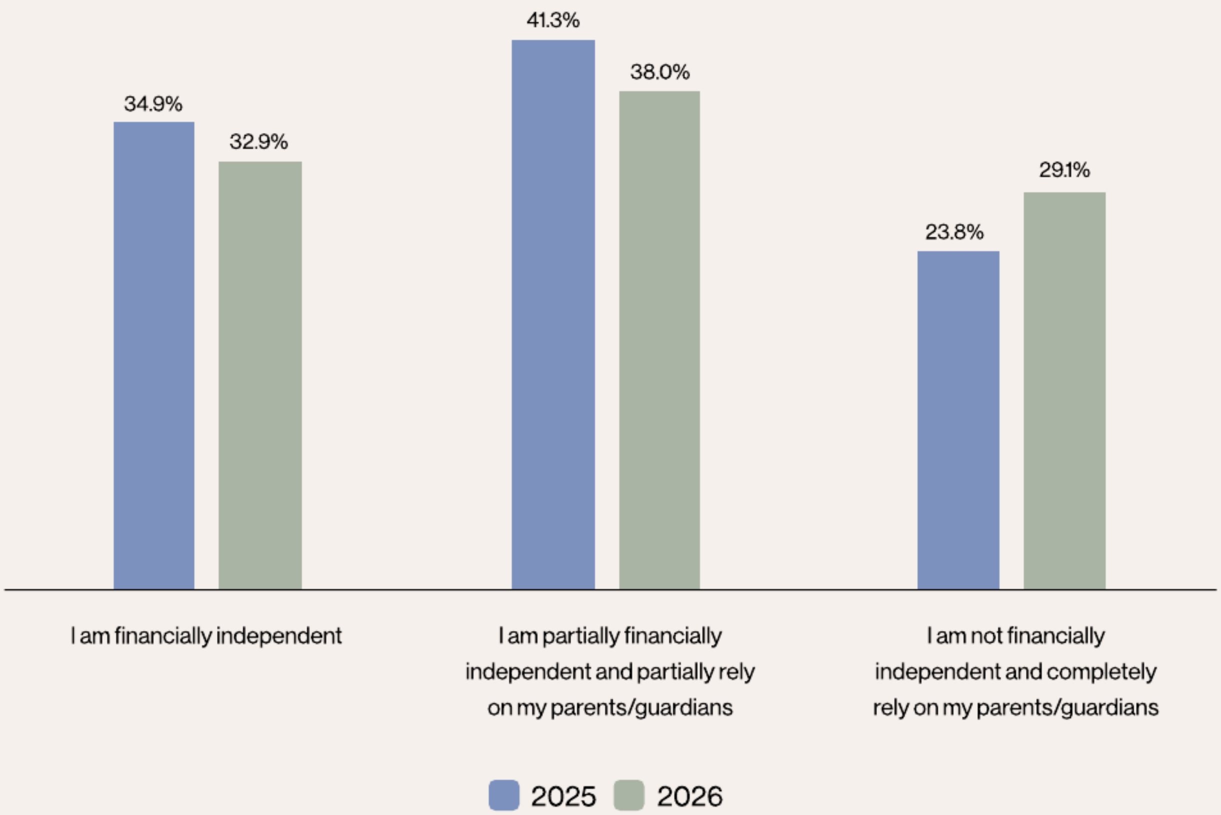
⟶ Insights into financial trends among the youth


Rotterdam

Financial Independence Dwindles

Financial independence has dwindled year-on-year, with not only a lower proportion of the youth claiming to be financially independent, but also an increasing proportion stating they completely rely on their parents/guardians. Interestingly, this shift has hampered growth within livestream and social commerce, with spend activity simultaneously taking a hit year-on-year across these platforms. Among the youth, individuals who claim to be financially independent over index in terms of spend activity across social and livestream commerce, with shifts in financial independence inevitably weighing down spend activity across social and livestream shopping.

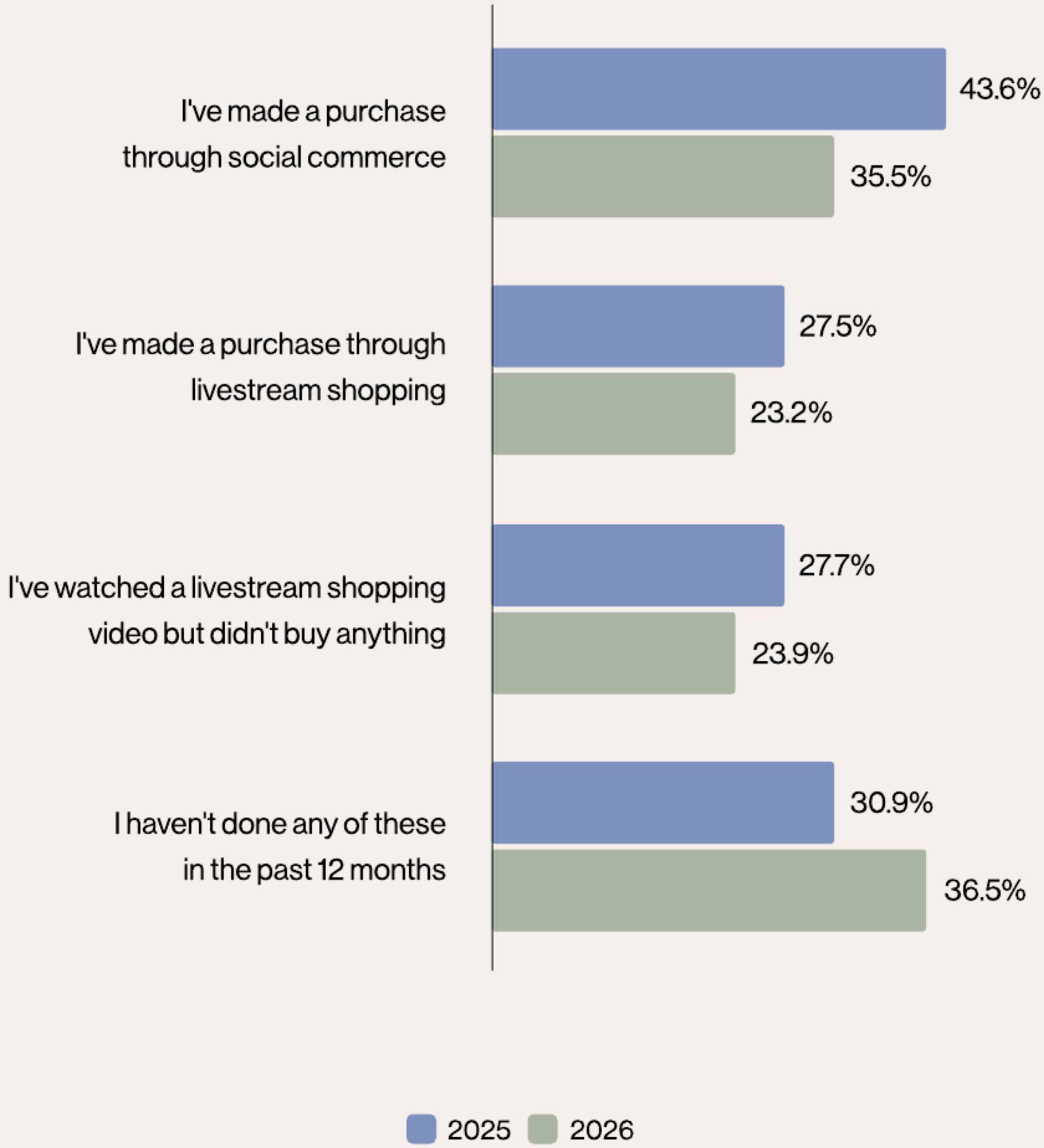
Financial independence among the youth



Base: US respondents aged 11-24; 6,312 (2025) and 6,126 (2026)

Social commerce dips amid waning financial independence

Social commerce and livestream purchasing patterns



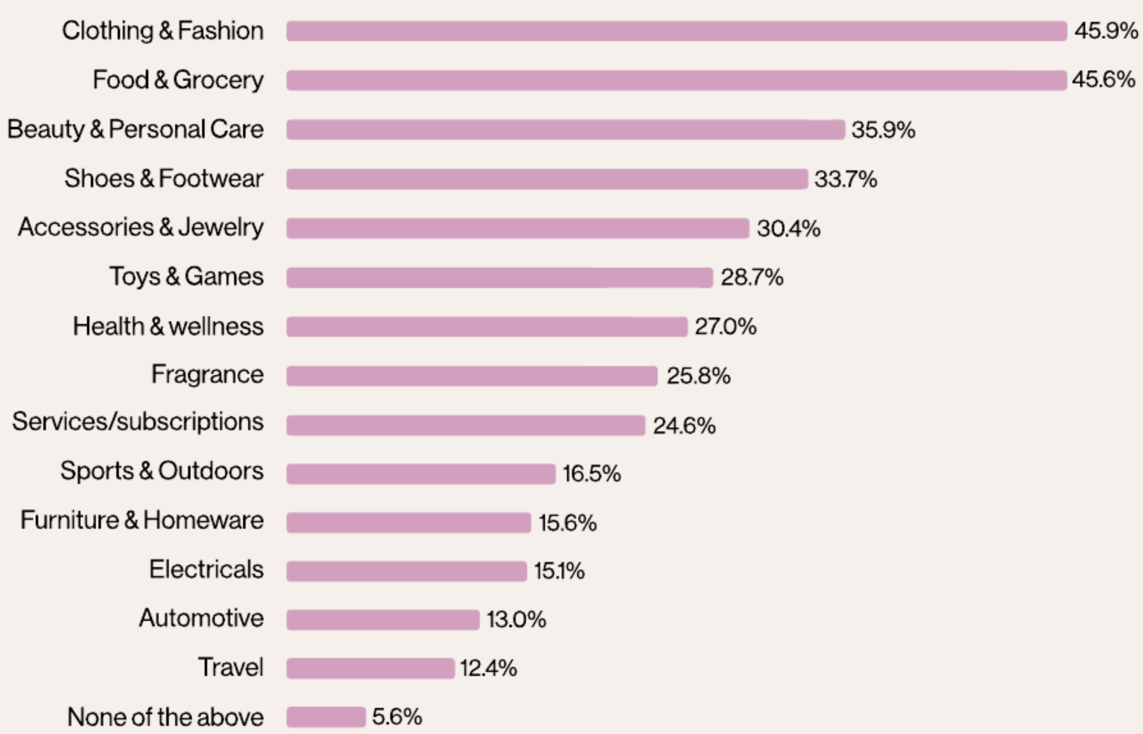
Base: US respondents aged 11-24; 6,312 (2025) and 6,126 (2026)

Youth spending is concentrated in discretionary categories

Over 70% of the youth describes themselves as fully or partially financially independent, but purchase activity suggests spending from these cohorts is fragmented. For example, less than half of respondents claimed they had purchased food and grocery over the past 12 months, posing questions as to the definition(s) of financial independence among the youth.

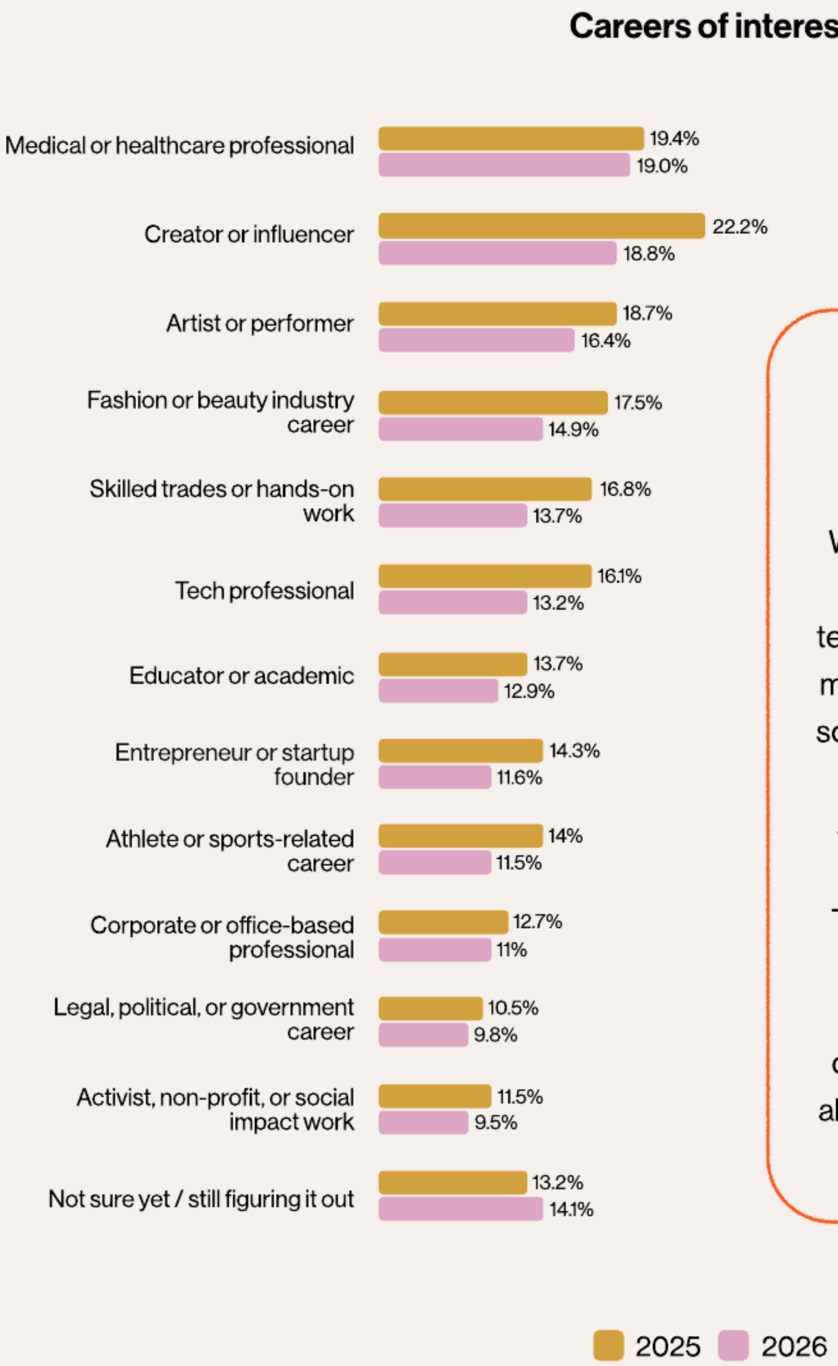
Where the youth are making personal investments, it's largely across discretionary categories such as clothing and beauty, while more mundane, essential spend in areas such as automotive or furniture largely sit outside youth spend activity.

Items personally purchased in the past 12 months



Base: 6,126 US respondents aged 11-24

The youth are less clear when it comes to specific careers



AI muddies the water when it comes to careers

While job preferences have remained generally consistent on last year, in terms of creator or influencer as well as medical professional being particularly sought after, there's a greater degree of uncertainty when it comes to job aspirations among the youth overall.

The rapid development of AI over the last 12 months has inevitably made young people second guess their career choices, with people cautious about pursuing sectors which could be 'replaced by' AI.

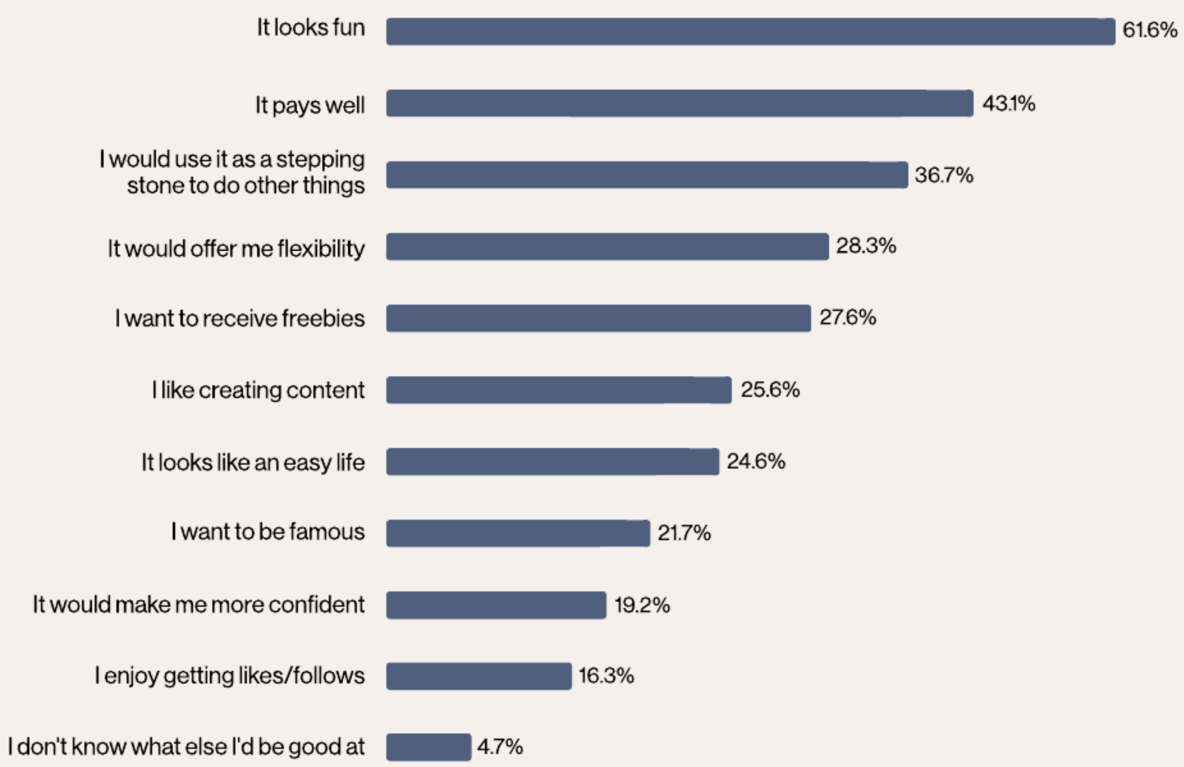
Base: US respondents aged 11-24; 6,312 (2025) and 6,126 (2026)

Enjoyment Underpins Influencer Motivations

The main reason for the youth wanting to pursue a career as an influencer or content creator is centered around enjoyment, with this being a particular motivator for females (65.4%).

Beyond this, factors such as compensation and opportunities stemming from influencer life play a key role in motivating such aspirations. Gen Z slightly over index in response rate for using being an influencer as a platform to do other things (38.1%). Not only does this represent a degree of entrepreneurship, but also experience, with this demographic having watched famous influencers go on to do things like launch brands. Additionally, just under one in five also selected that a career as an influencer would make them more confident. This is indicative of the element of self-validation that derives from likes and follows among the youth.

Motivations behind wanting to be an influencer

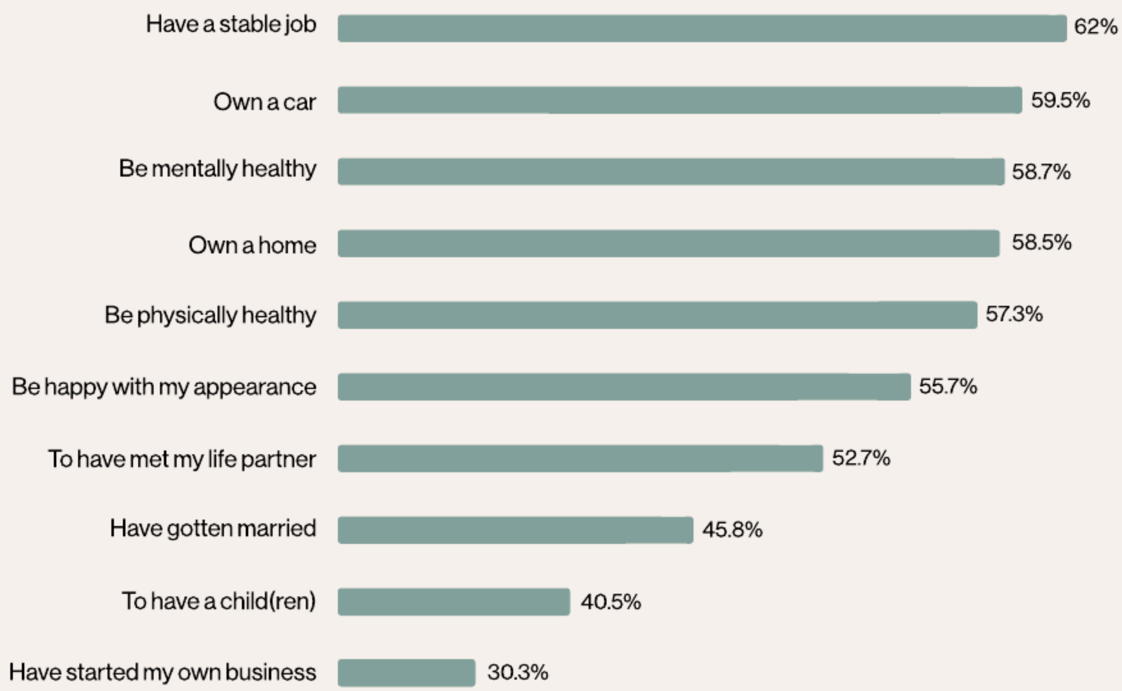


Base: 1,119 US respondents aged 11-24 who want to pursue a career as an influencer

The Reimagined American Dream

The American Dream was once underpinned by the belief that anyone can build a better life through freedom, hard work, and opportunity. While what this dream looks like has evolved over time, traditionally it would involve having a good job, buying a home, getting married, and having children. The data on the following page indicates a deviance from this. Only two in five see having children as a goal for them by the age of 35, while just under half don't see meeting their life partner by this age as a priority either. Instead, priorities center around having a stable job, as well as home and car ownership, with areas such as mental health very much at the forefront. Interestingly, just under a third also strive to start their own business by age 35. This highlights the sense of entrepreneurship that persists among the youth, while also reflecting a reluctance to conform to authority, in the form of upper management or a boss.

Goals by age 35



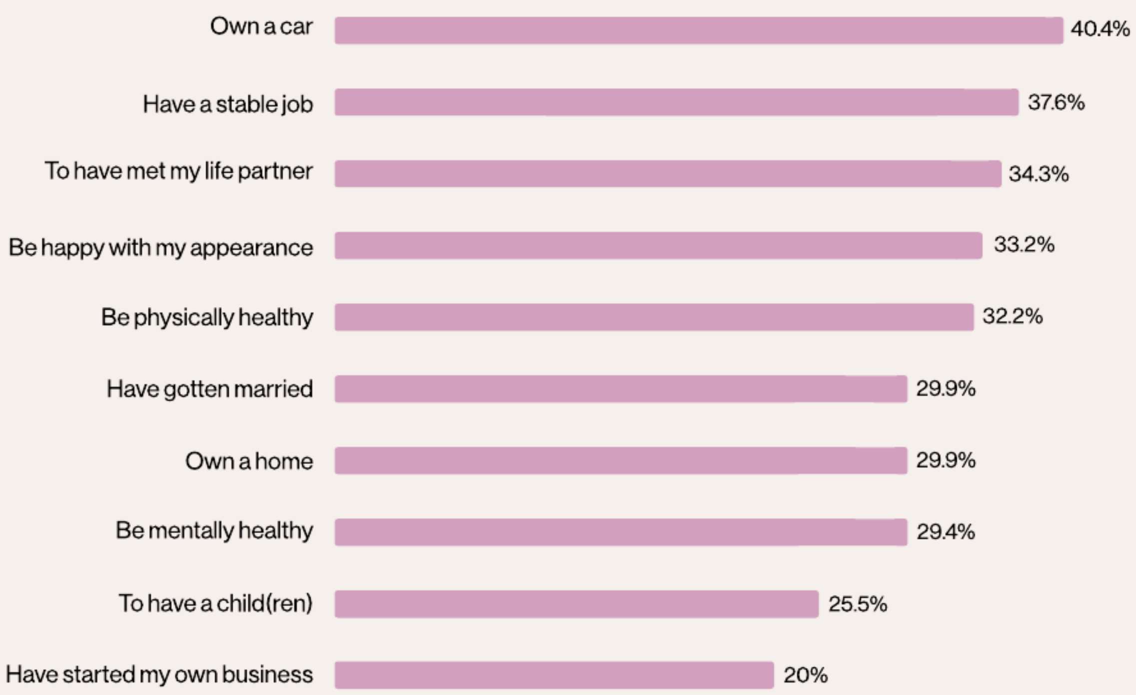
Base: 6,126 US respondents aged 11-24

‘The American Dream’, but with a hint of realism

Not only has ‘The American Dream’ evolved in the sense of what the youth are prioritizing, but also in terms of what they view as realistic. Factors such as a turbulent economy have made the youth more cynical in terms of their outlook, with under 30% viewing home ownership as guaranteed by the age of 35 and less than 40% thinking that job stability is a guarantee too.

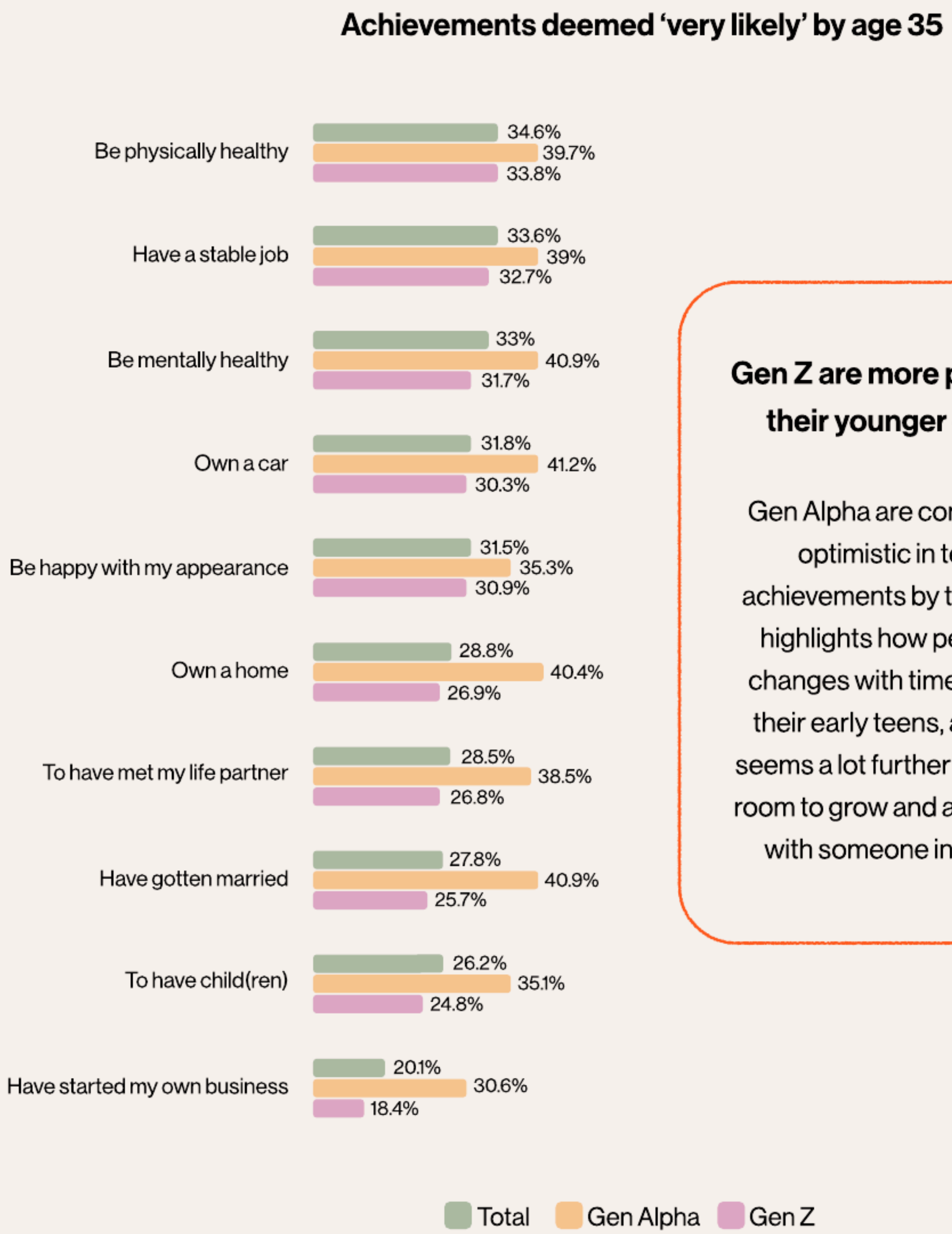
In recent years, the youth have lived through a global Pandemic, cost-of-living crisis, and geopolitical conflict. All of which have grounded them with a sense of realism when it comes to likely achievements over the next one to two decades, age dependent.

Achievements deemed guaranteed by age 35



Base: 6,126 US respondents aged 11-24

Gen Alpha is more optimistic than Gen Z on future goal outlook



Gen Z are more pessimistic than their younger counterparts

Gen Alpha are comparatively more optimistic in terms of likely achievements by the age of 35. This highlights how perception of age changes with time. For someone in their early teens, age 35 inevitably seems a lot further off, with a lot more room to grow and achieve, compared with someone in their early 20's.

Base: 6,126 US respondents aged 11-24

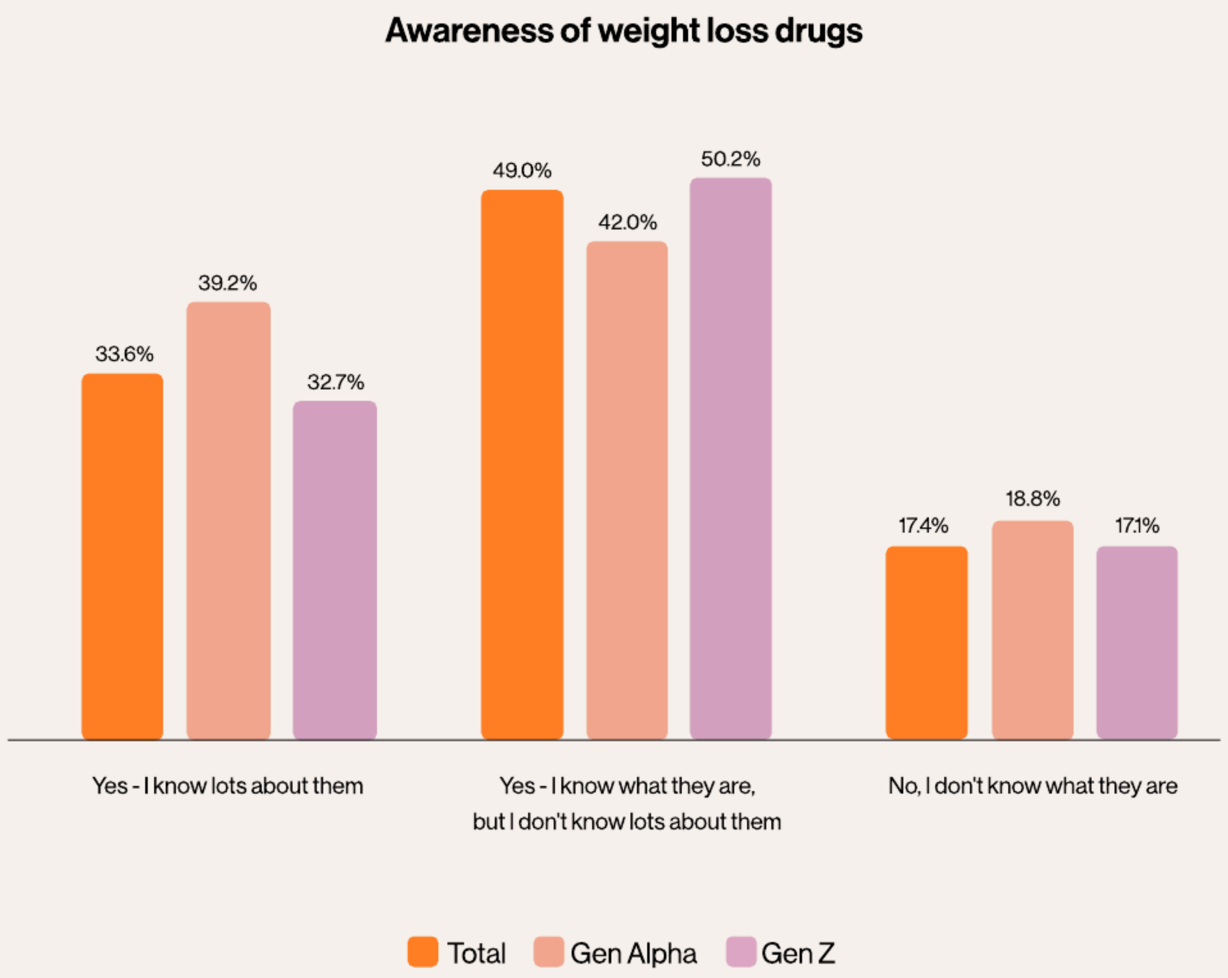
Mental Health

⟶ Insights into perceptions around mental health among the youth

Gen Alpha claim to be well-versed on GLP-1s

Nearly one in four Gen Alpha respondents claim to be well-versed on GLP-1s. This likely comes down to the fact that much of Gen Alpha still lives at home, with this therefore meaning they have greater exposure to these medications if a parent or guardian is using them, or even just discussing them in-home.

Additionally, Gen Alpha respondents were more likely to cite that their mom/stepmom or dad/stepdad were using these medications, with this once again reflecting greater awareness as a result of being in the same household.

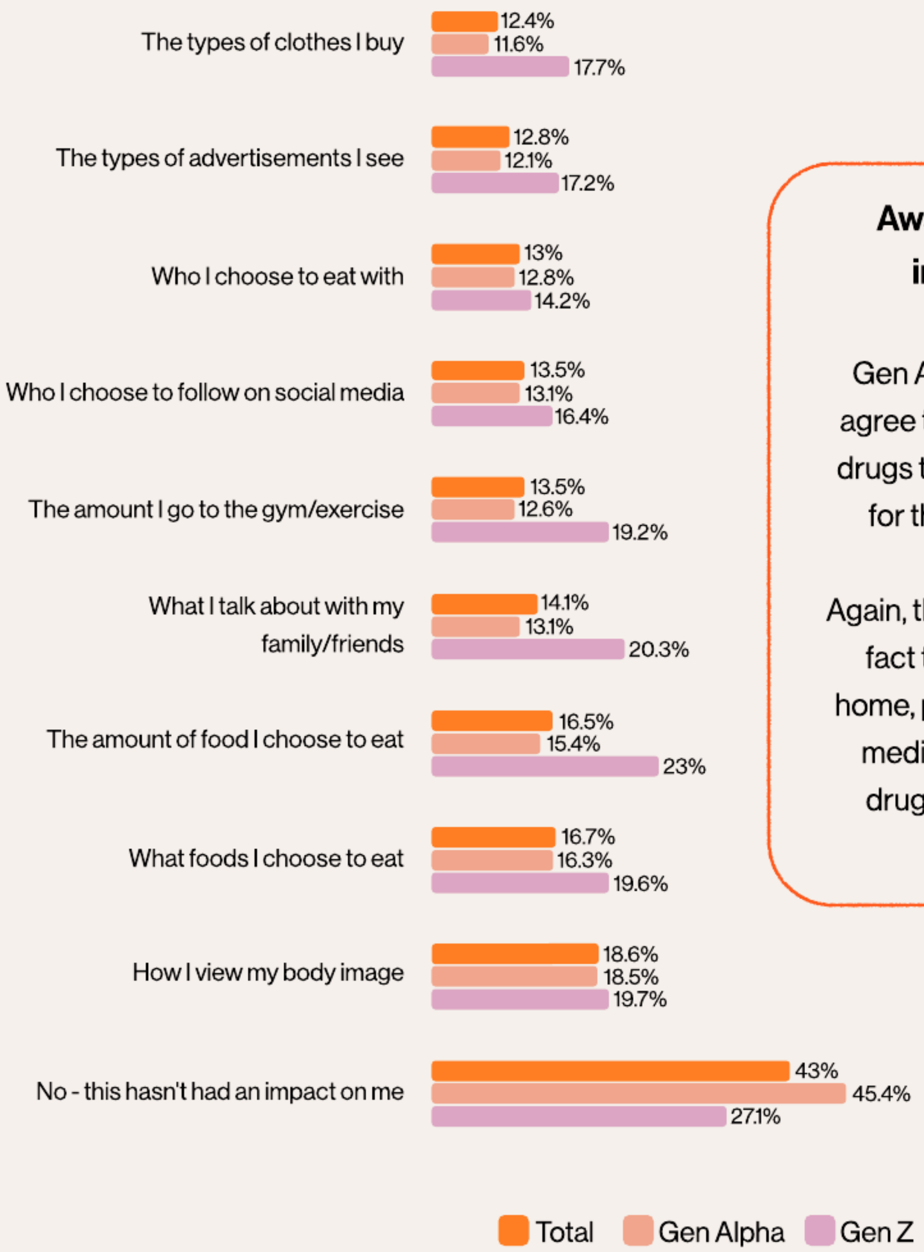


Base: 6,126 US respondents aged 11-24

Gen Alpha admit to impact of GLP-1

Nearly a quarter of Gen Alpha respondents claim awareness of GLP-1s has influenced the amount they choose to eat.

Impact of GLP-1 awareness on behavior



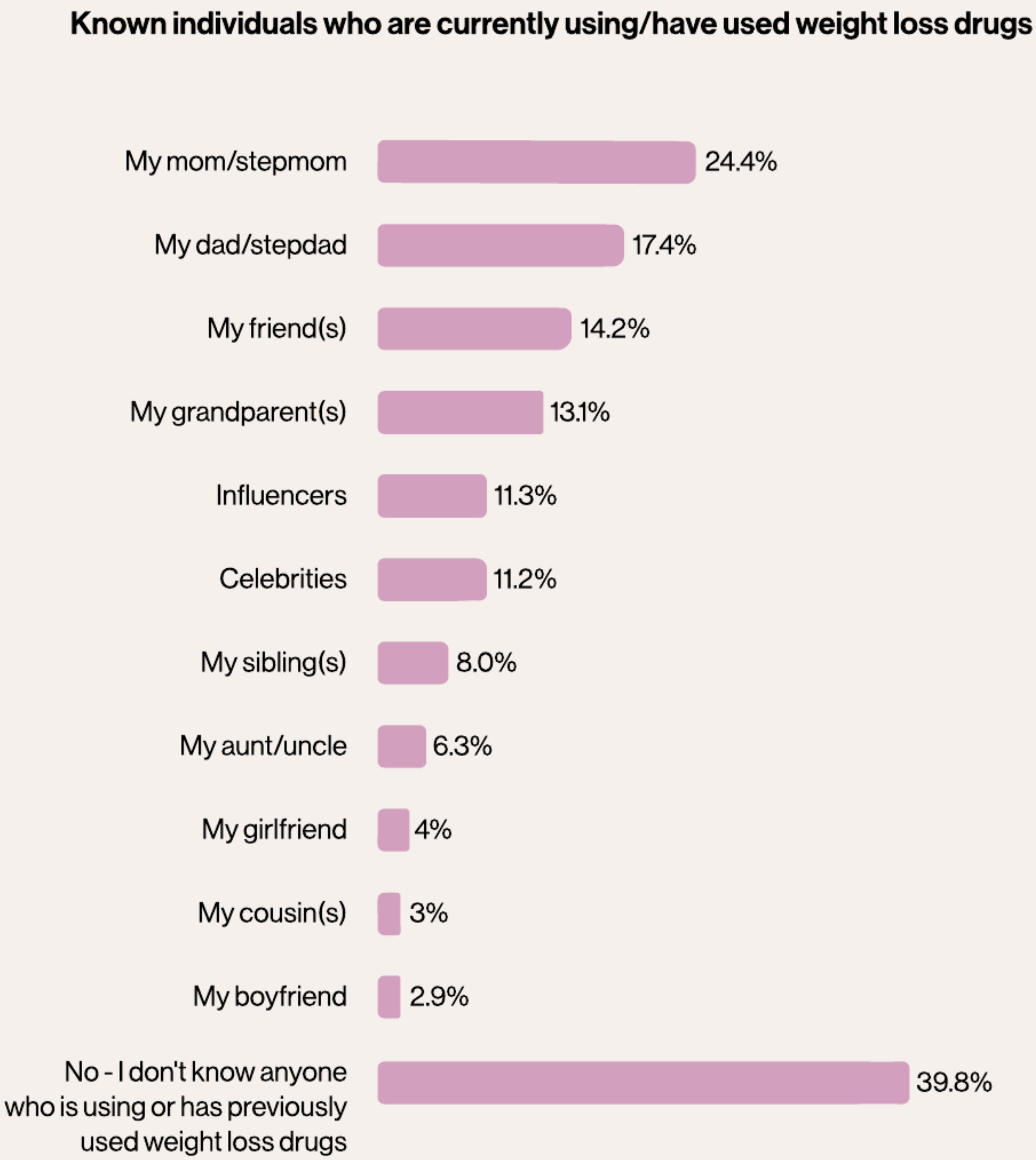
Awareness translates into impact for Gen Alpha

Gen Alpha are much more likely to agree that awareness of weight loss drugs translates into tangible impact for them, compared with Gen Z.

Again, this is likely driven in-part by the fact that many of them still live at home, perhaps with a parent on such medications, meaning that these drugs have a more real-life, daily relevance for them.

Base: 6,126 US respondents aged 11-24

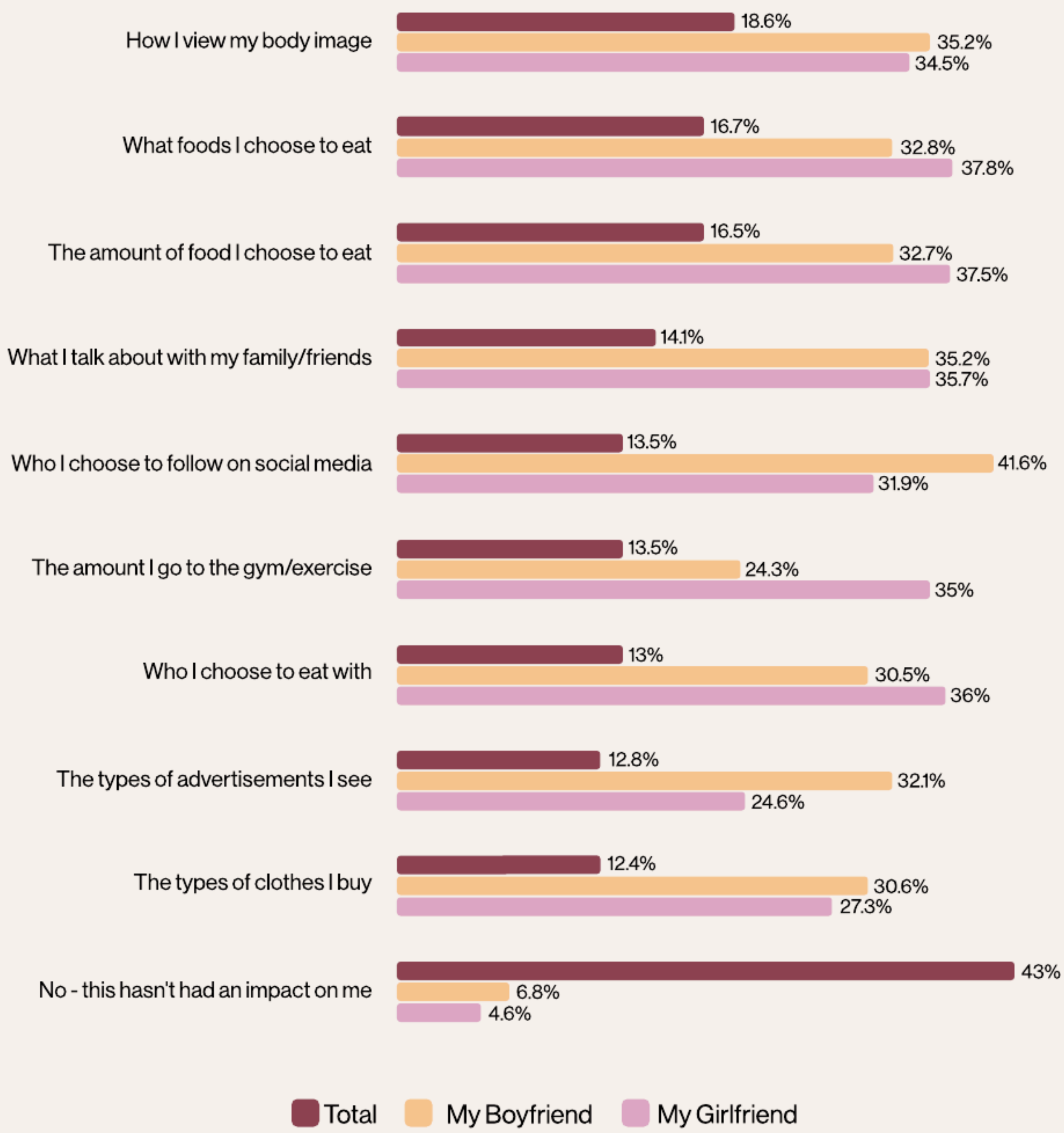
Parents are the most known users of weight loss drugs among the youth...



Base: 5,081 US respondents aged 11-24 who are aware of weight loss drugs

...but partner usage has a disproportionate impact on behavior

Impact of GLP-1 awareness on behavior, by known person using GLP-1 medication



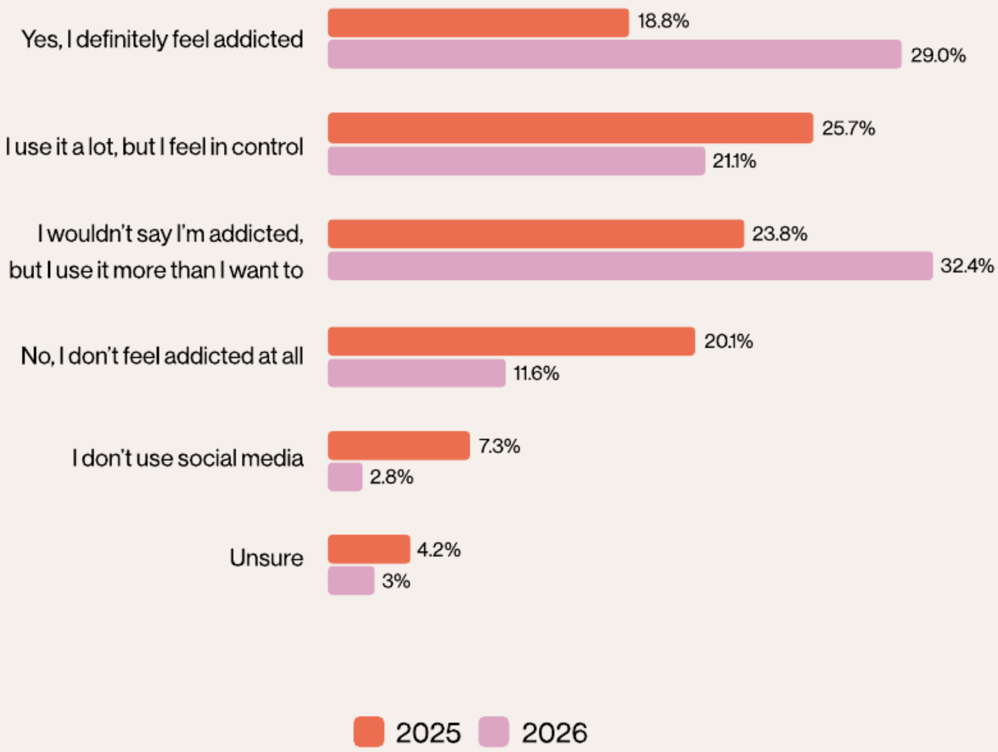
Base: 5,081 US respondents aged 11-24 who are aware of weight loss drugs

Social Media Addiction Surges

While addiction to social media surges, the youth are more likely to cite that the impact of socials is largely positive this year compared with last. However, those who claim to be addicted over index in terms of feeling pressure to be on social media daily, indicate that engagement is in-part motivated by pressures.

Additionally, those that cite they are addicted are more likely to say that their appearance has a huge impact on their identity (21.6% vs. 15.4% overall). This suggests that while the youth increasingly view the impact of social media as positive, rising addiction is manifesting in a somewhat negative way, in terms of what the youth feel underpins their identity and a perception that they are somewhat defined by their aesthetic.

Claimed addiction to social media



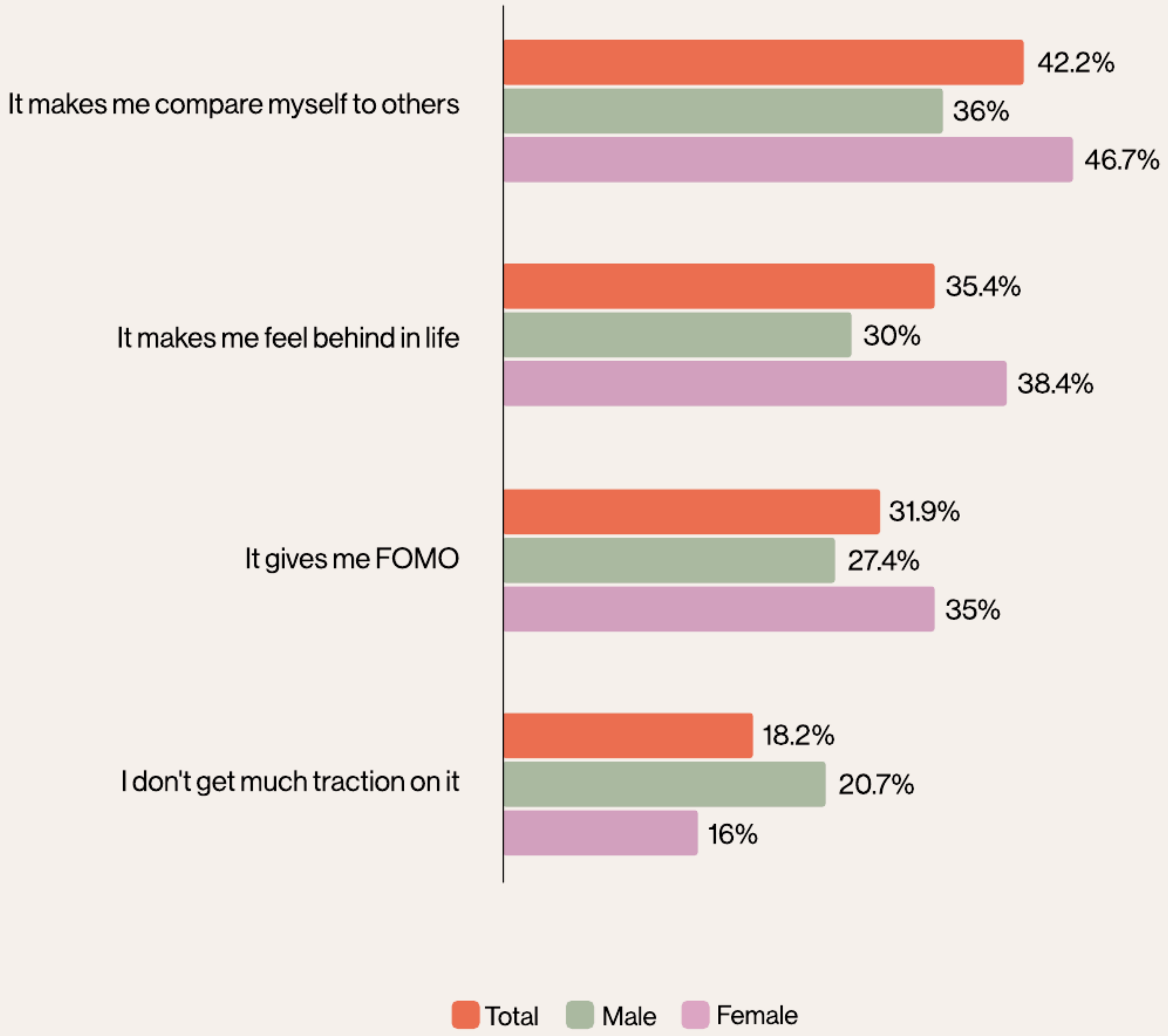
Base: US respondents aged 11-24; 6,312 (2025) and 6,126 (2026)

Comparison is the thief of joy for girls when it comes to social media

Rationale for negative sentiment relating to social media and mental health is much more complex among females, while for males it largely centers around receiving little traction (i.e. in the form of follows and likes) on socials.

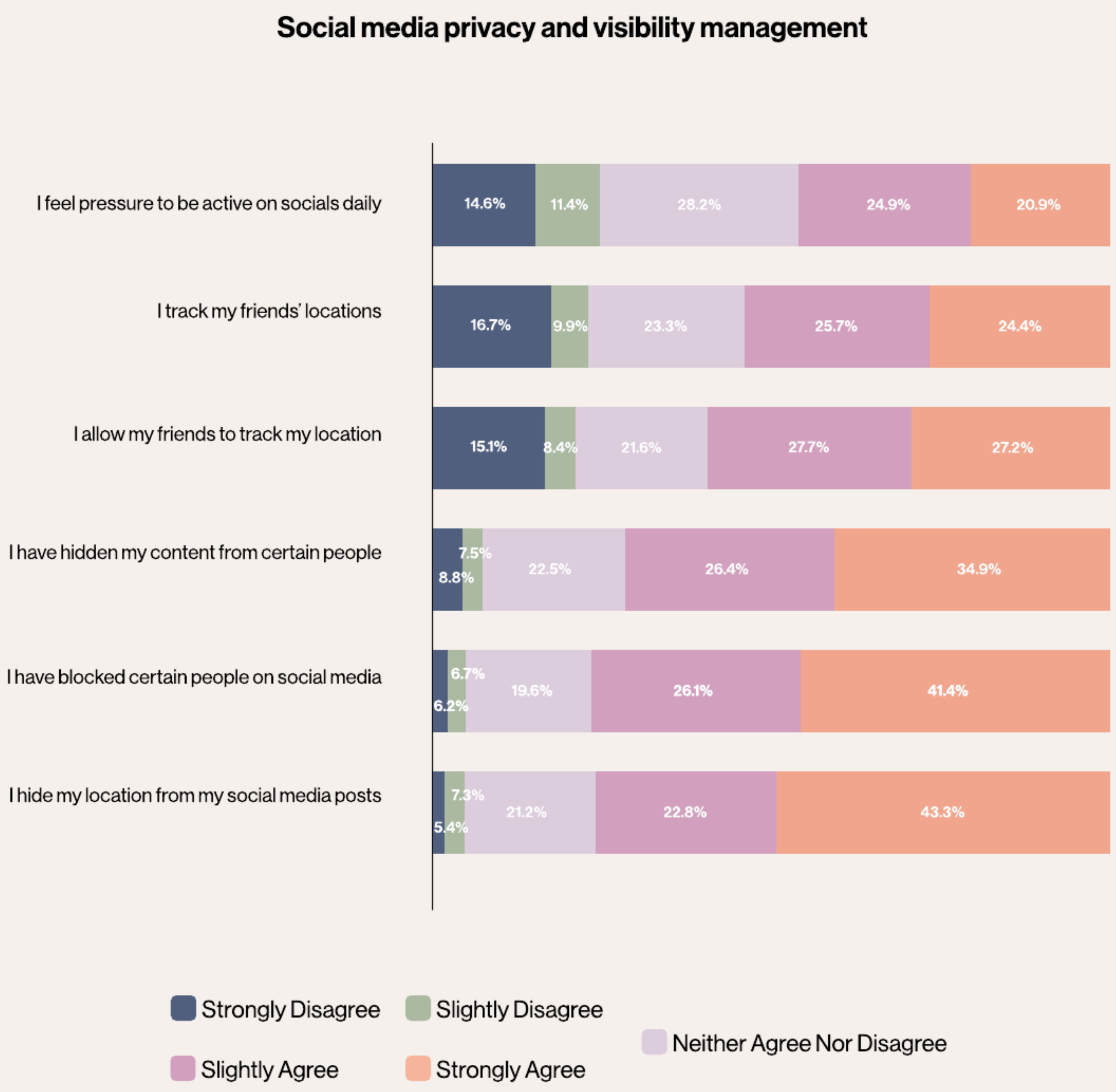
For females, negative sentiment is underpinned by factors relating to comparison, whether that be feeling behind in life, experiencing the fear of missing out, or making comparisons between themselves and others.

Rationale for viewing social media as having a negative impact



Base: 4,233 US respondents aged 11-24 who think social media has a mostly negative or mixed 76 impact on mental health

Social media pressure is driving youth to curate safe online spaces

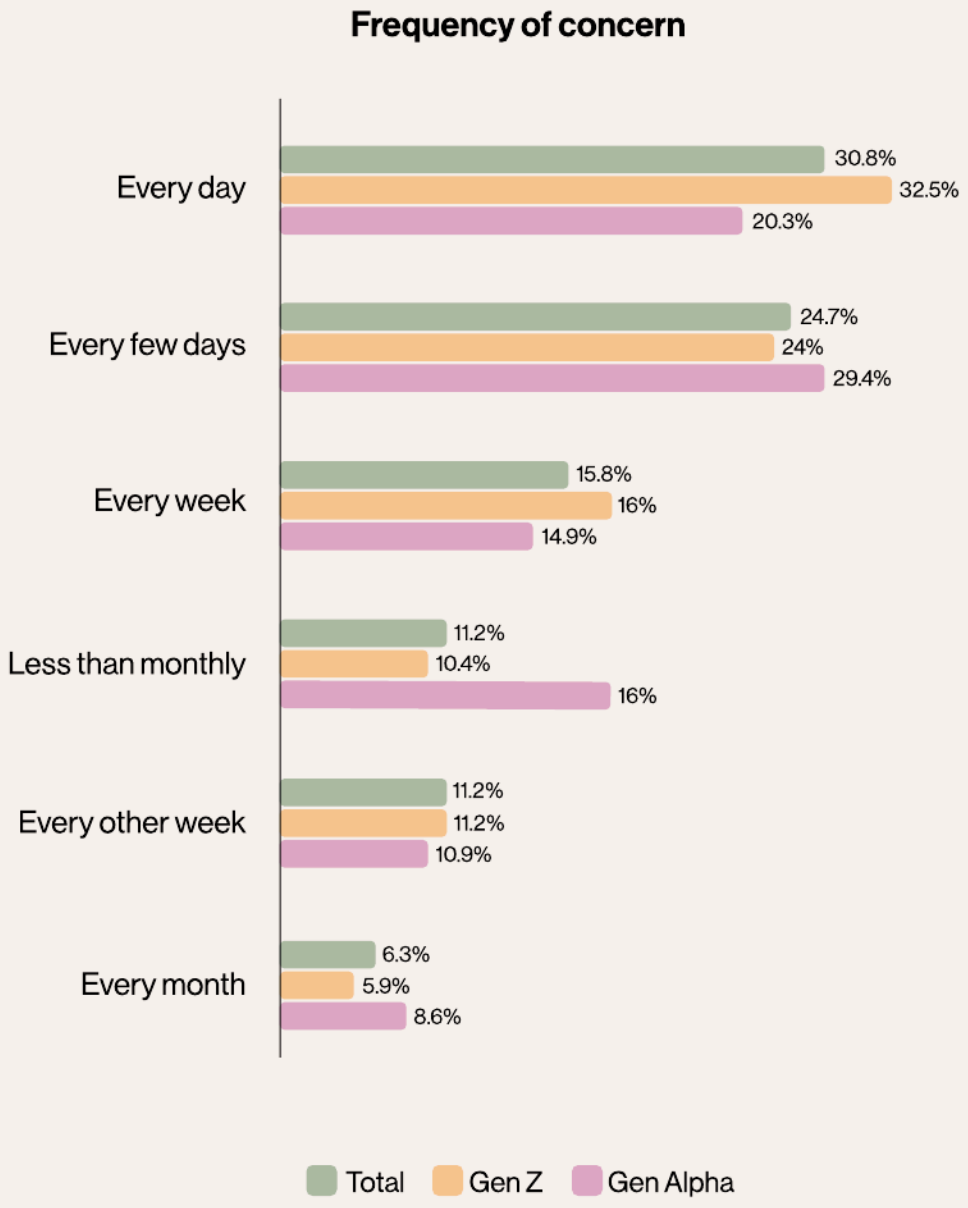


Base: 6,126 US respondents aged 11-24

Gen Z carries more constant concern than Gen Alpha

As Gen Z becomes financially independent and enters the workforce, the stress of factors such as finances, the economy, and the job market are becoming everyday stressors.

Whereas Gen Alpha remain more removed from the immediate stress of adulthood, and as a result see more intermittent stress around key stressors like academics instead.



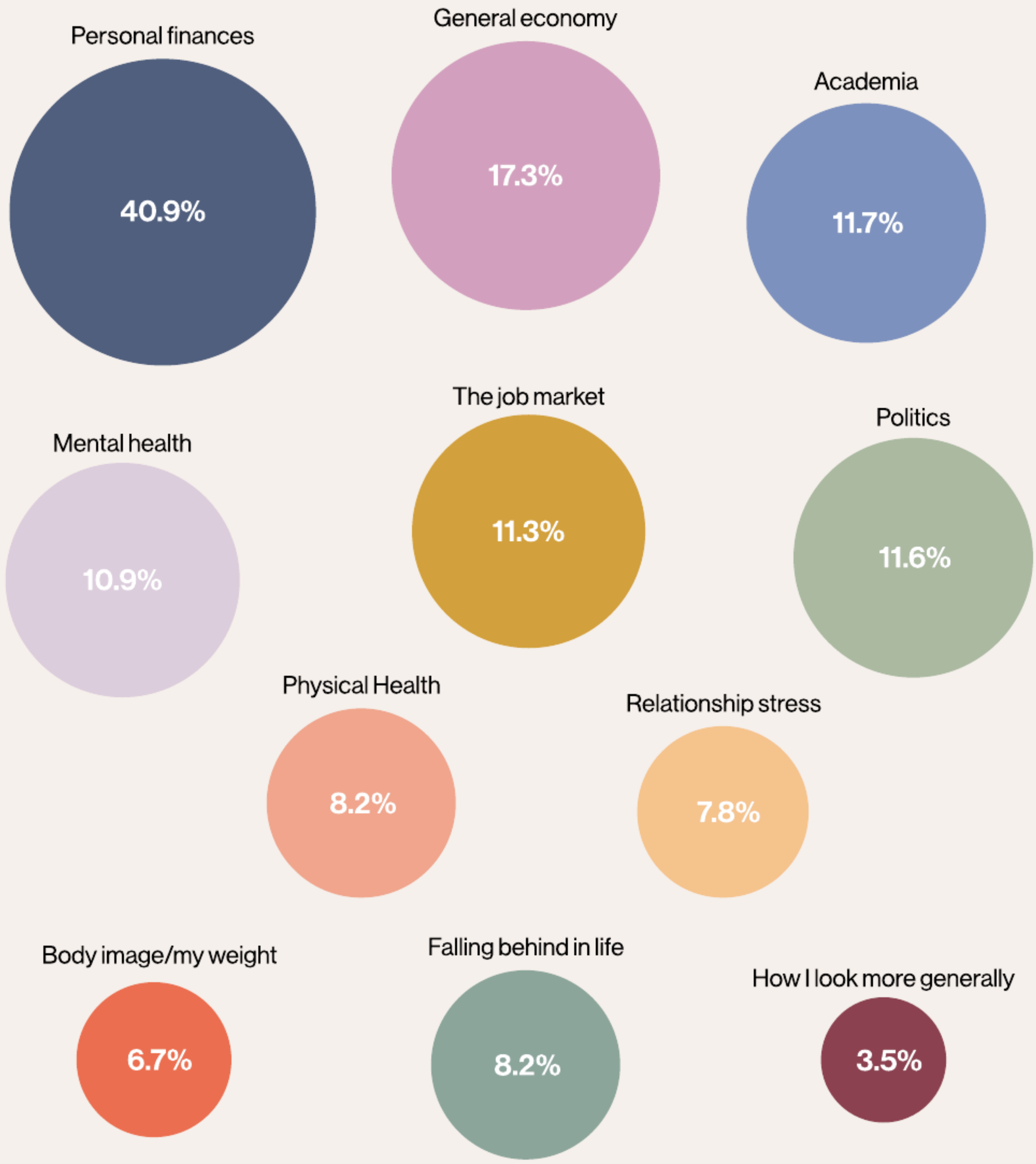
Base: 6,126 US respondents aged 11-24

Personal finances dominate fears among the youth

Personal finances weigh heavy on the youth

Not only did over two in five respondents cite that personal finances were their biggest concern (of factors listed), but of those 40.9% of respondents, 39.1% stated that their worries, fears, and concerns impact them every day (vs. 35.0% on average).

Fears among the youth

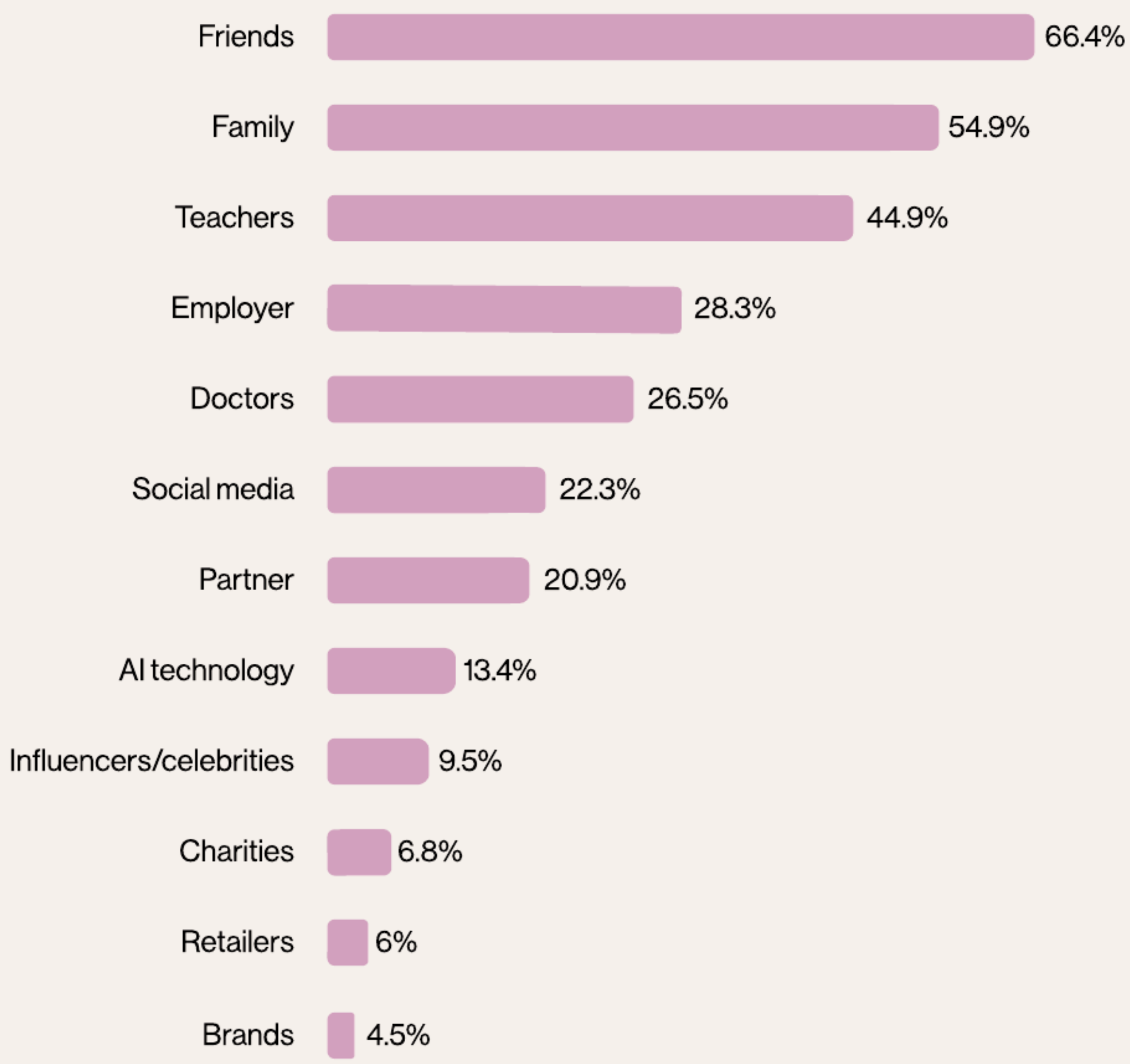


Base: 6,126 US respondents aged 11-24
Note: the percentage in each bubble represents the proportion of respondents who marked each factor as their number one concern

The onus still lies with family/friends

Only a small minority believe that brands and retailers are responsible for preserving the youth's mental health.

Individuals deemed responsible for preserving the youth's mental health



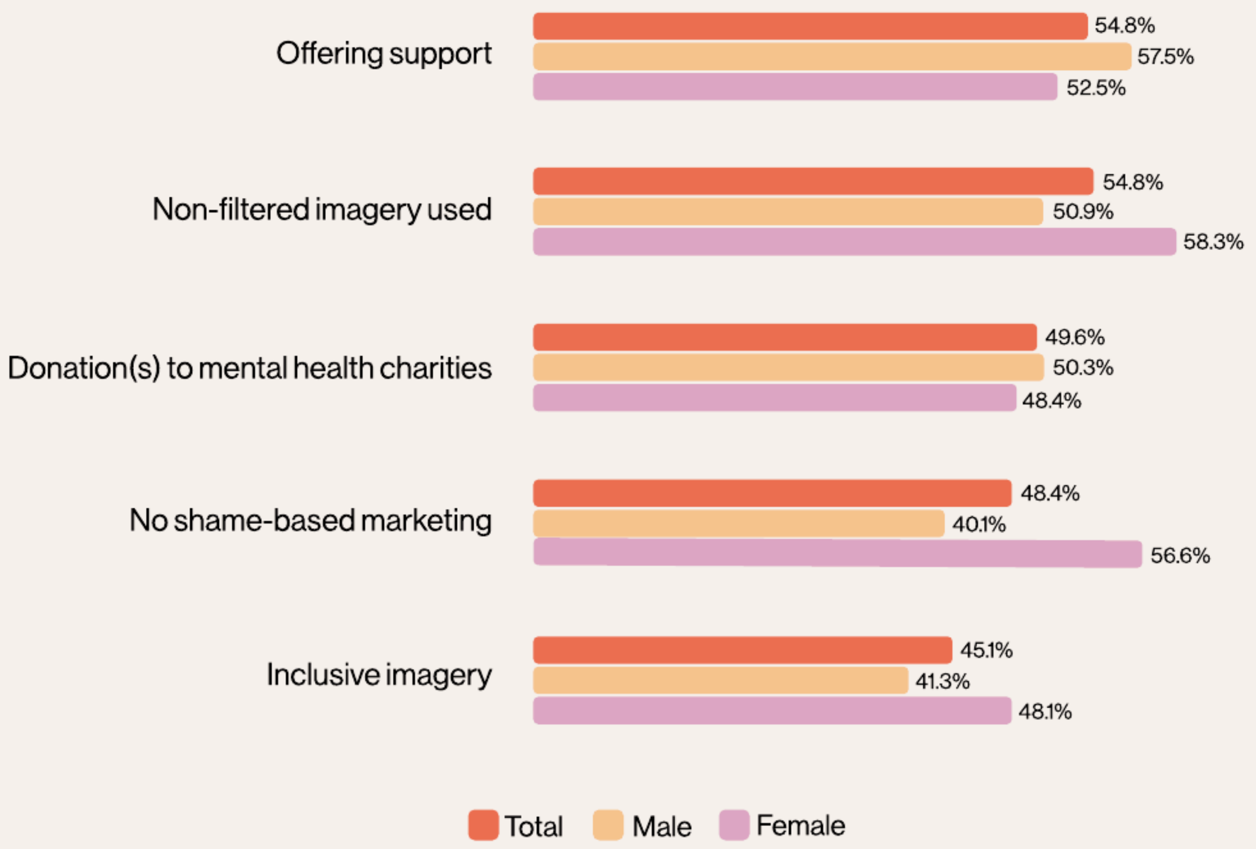
Base: 6,126 US respondents aged 11-24

Inclusive imagery is important to females

When it comes to preferred methods for retailers/brands to improve the mental health of the youth, for males its more about being a source for support, whereas for females it centers around the kind of marketing they share.

Females are particularly concerned with brands/retailers avoiding use of filtered imagery to perpetuate unrealistic beauty standards. While females also over index in terms of inclusive imagery being a priority, the gender disparity here is much less pronounced, indicating that for females, authenticity is the most important factor when it comes to retailer/brand marketing.

Preferred retailer/brand efforts in improving youth mental health



Base: 6,126 US respondents aged 11-24

Conclusions

→ Future outlook for the seven traits

Where we go from here

Whilst the future remains uncertain, it's possible to predict how the seven key traits evolve over the next five to ten years...

Applause To Armor

As Gen Alpha mature, the whole youth cohort will move more into a phase where they shop more for how they want to feel. For businesses, this necessitates a deeper understanding of needs and less of a focus on external trends.

Fashion Therapy

External anxieties will likely accelerate rather than ease. Wellness framing will become a more important part of fashion marketing. Things like mood responsive designs and functional fabrics will become more of a part of the fashion landscape.

The Guilt Tariff

While affluence will increase as the youth cohort matures, channels like resale and rental will become embedded parts of the shopping experience – driven on by regulation. As such, they will become mainstream business models.

The Intimacy Firewall

AI will expand into more areas and will undertake more tasks. However, there will likely be a backlash against it taking over everything, and it will be refused affective trust. Real-world, human experiences will become more important as a counterbalance.

The Kinship Premium

As synthetic content, AI-generated reviews and deepfakes flood the information environment, unfakeable sources become more valuable, not less - family and close friends are likely to matter more in ten years, not the same or less.

Benchmarked Living

Feelings of being left behind will intensify. However, regulation will likely aim to protect the youngest age groups from the intensity of social media, which may provide some relief. Calm experiences will become a critical counterpoint from brands and feeds.

The American Dream 2.0

The amended American Dream is likely to persist as financial constraints make some of the classic goals hard to achieve. Newer wellness considerations will likely be joined by a desire to feel in control of life as one of the primary goals.

The final word

While many of the trends in this research continue to evolve and adapt, few of them are transitory.

They represent a permanent step change in the way the youth is living their lives compared to previous generations. If anything, the next ten years will bring more disruption and churn as technologies like AI become more advanced and creep into more aspects of life. The youth will likely embrace and shun this at the same time. The embrace will come from using AI to undertake tasks and improve the efficiency of life. The youth will use AI as a tool to become more creative and accomplished, something that will allow them to better achieve their goals in a more hectic and complex world. The shun will come from not allowing AI to take over every aspect of life. Personal relationships, time, and space for genuine thought, physical experiences, and community all become more important as a counterpoint to artificial intelligence and a technology-driven world.

Of course, new technology will also eventually allow functions like mass personalization in retail – where products can be easily (and cheaply) adapted to the tastes of individual consumers. The youth will likely embrace this to become more self-expressive and to put their own spin on wider trends, which will remain important as a reference point. This will eventually extend beyond products to wider feelings and wellness. The youth is already spending more on wellness products than previous generations, and this is likely to accelerate further as technology and things like bio-hacking become more sophisticated. This, however, will be more rooted in internal feelings than external appearance.

Technology will also drive more of the youth into entrepreneurship – whether it be creating content or selling product. This will sometimes be done as a side-gig, creating some economic certainty in a job market that will seem less stable. Big firms will remain important, but under this a patchwork of smaller brands will proliferate – something that will increase competition for traditional and established businesses or provide new opportunities for partnerships.

At the heart of all these shifts is a youth generation that will, despite the advances in technology, remain very human. That means businesses must both embrace technology to serve the consumer and create some form of authentic community at the same time. The winners will be the ones that offer both efficiency and emotion.