

THE
YOUTH REPORT
by PACSUN

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Contents

3	Executive Summary	Digest of key findings
7	The Youth: Identity	Insights into identity perceptions of the youth
17	The Youth: Style Inspiration	Insights into style inspiration among the youth
32	The Youth: Discovery	Insights into methods of discovery among the youth
51	The Youth: Social Media	Insights into social media trends among the youth
64	The Youth: Finances	Insights into financial trends among the youth
78	The Youth: Mental Health	Insights into mental health among the youth

Executive Summary

—▶ Digest Of Key Findings

Key Takeaways

Individualism and sense of self is important to Gen Z

There is a general reluctance to be molded by external influences, particularly among Gen Z, as 32% claim that they themselves have the biggest influence on how they think, feel or make decisions. This contrasts to Gen Alpha, who are in their more formative years and are therefore both more open to and reliant on external influences, such as parents and caregivers. This hesitance to unify somewhat reflects the backdrop of the US, a market of 'rugged individualism', comprised of many cultures and operating across multiple time zones. This sense of self-influence also comes through in Gen Z's reluctance to admire the lifestyles of content creators/celebrities as well as admit to taking inspiration from the style choices of these individuals.

TikTok is an engine for discovery

#News has 14.5 million posts on TikTok, as of June 2025, driven by the fact that 66% of the youth turn to the platform to keep up with current events or pop culture trends. Whilst the platform can be informative, it is often a culprit when it comes to spread of misinformation. For example, a recent narrative around luxury handbags being made in the same factory as budget-friendly handbags has been circulating the platform and recently been found to be untrue. However, these accounts can leave a lasting impression on users, who may now struggle to justify luxury spend in the handbag segment. Beyond current events, TikTok users are more likely to agree that social media helps them uncover brands they didn't previously know about, compared with the average respondent. This is in-part driven by the TikTok shop, but also by the prevalence of content such as 'Get Ready With Me' videos, hauls and reviews

Feelings of Anemoia persist among the youth

Anemoia, a yearning for a past that you never actually experienced, is a common feeling among the youth. These feelings are in-part driven by the fact that the youth have lived through challenging times in recent years, with both political and economic instability, as well as the recent COVID-19 Pandemic contributing to this. This backdrop has led to a yearning for what is being seen as a more romantic past, with trends such as 'Tomato Girl Summer' which embodies a historic slow-paced lifestyle of a Mediterranean summer, the resurgence of Y2K fashion and growing preference for things like retro style cinematography gaining favor. In the case of fashion, whilst the film *How to Lose a Guy in 10 Days* dates back to 2003, predating even the launch of TikTok, #HowToLoseAGuyIn10Days has amassed nearly 50k posts on the platform, as of June 2025. Within the film, the lead part is seen dancing in a butter yellow dress, a scene which TikTok users are recreating with dresses of a similar style. This trend has driven a significant surge in Google searches for 'Butter yellow dress', with the color benefiting from a real moment this summer, thanks to both TikTok and this feeling of anemoia.

Degree of financial autonomy is mixed

Variety in response to questions around financial independence reflects the array of life stages typical of the years from 11 through to 24, when it comes to both living situation as well as education and/or employment. Whilst 35% claim to be financially independent, a further 24% completely rely on their parents/guardians. It's worth noting, however, that definitions of financial independence are relative. Of those who live in a family-owned home, one in five claim to be financially independent, with this raising obvious questions as to involvement in spend on things like mortgages, rent or bills. This could also suggest an incoming reality check once those respondents move out of home and are forced to spend on non-discretionary items.

The influencer dream is prevalent

Over one in five (22%) of the youth aspire to be or are currently pursuing a career as a content creator/influencer, with this rising to 28% among Gen Alpha. For Gen Alpha, following of influencers is driven more by admiration and inspiration, with influencer/creator posts showcasing what best-in-class looks like and likely informing the own content choices of Gen Alpha users. This is further highlighted by the fact that 75% of Gen Alpha respondents have bought clothes specifically to create social media content within the past year, with such investments deemed worthwhile as these respondents strive to build their own following and pave the way for their future careers.

Online spend in fashion continues to grow

In the US, growth in non-store retail is expected to outpace in-store retail within clothing in the coming years in terms of retail spend as 57% of the youth spend over 40% of their clothing and apparel budget online. This out-performance is driven in-part by preference for discovery through browsing online, compared with in-store with such behaviors motivated by convenience, budget and choice. Whilst willing to spend on clothing, the youth are extremely value conscious with 56% claiming they will always look for the best deals and prefer cheaper options and 36% seeking out coupons before purchasing. Online shopping provides an opportunity for the youth to easily compare prices, whilst the rise of 'dupes' has driven a level of skepticism among younger consumers and hindered willingness to unconsciously trade-up without having conducted extensive online research first, with this cynicism driving spend in the channel.

Key Takeaways

A gender divide persists in relation to AI

Females are less likely to agree with the statement 'I use AI chat-bots like ChatGPT regularly', compared with males. Males are also significantly more likely to agree with the statement 'Using AI tools like ChatGPT is as natural and intuitive for me as using social media.' Slower uptake of AI platforms could worsen the gender divide when it comes to areas such as employment and pay. This gives a sense of history repeating itself, with similar gender discrepancies happening in terms of the internet when usage eventually became more mainstream. Contrastingly to this, females are much more likely to be using Pinterest to create mood boards and save outfit ideas. This indicates a female preference for more visual, design-based platforms. Whilst AI is currently clunky in terms of user interface, this will likely shift with time, which will make the platform more appealing to a broader audience.

Comfort and confidence are key in fashion

Comfortable and casual are the leading ways in which the youth describe their personal style, with this indicating a preference for feeling as opposed to aesthetic. Similarly, a desire to feel more confident is the factor most likely to encourage a shift in personal style, with 47% stating this is as very likely to encourage a shift in fashion sense for them. To benchmark this, just 23% stated that seeing a friend or peer dress differently would be 'very likely' to have the same effect. However, it's worth noting the demographic nuances to this. Gen Alpha appear more aesthetic-focused, with this aligning with the broader narrative around them being in their younger, more formative years and having that yearn to fit in with friends. This is further evidenced through the fact that 21% of Gen Alpha dress in accordance with how they want to be seen by others (vs. 12% of Gen Z). Gen Alpha appear more willing to conform to traditional beauty standards, with this in-part driven by the fact that this demographic particularly over index when considering influencer/content creator as a career.

Concern for mental health outpaces physical health

Among the youth, 42% claim that mental health is most important in their life right now, compared with 12% who state the same for physical health. This generation has grown up in a social media-orientated world, with many experiencing negative side effects due to over usage, with nearly one in five admitting to being addicted to social media. This over usage, combined with general day-to-day pressures faced by the youth such as exams, the rising cost of living and societal pressures, have driven this concern over preservation of mental state. Building on this, females are more likely to claim they experience negative feeling on socials due to making comparisons between others and oneself. These comparisons are likely worsened by the increasing prevalence of weight-loss jabs, which distort beauty standards and make them feel even less attainable for young consumers.



Identity

—> Insights into identity perceptions of the youth



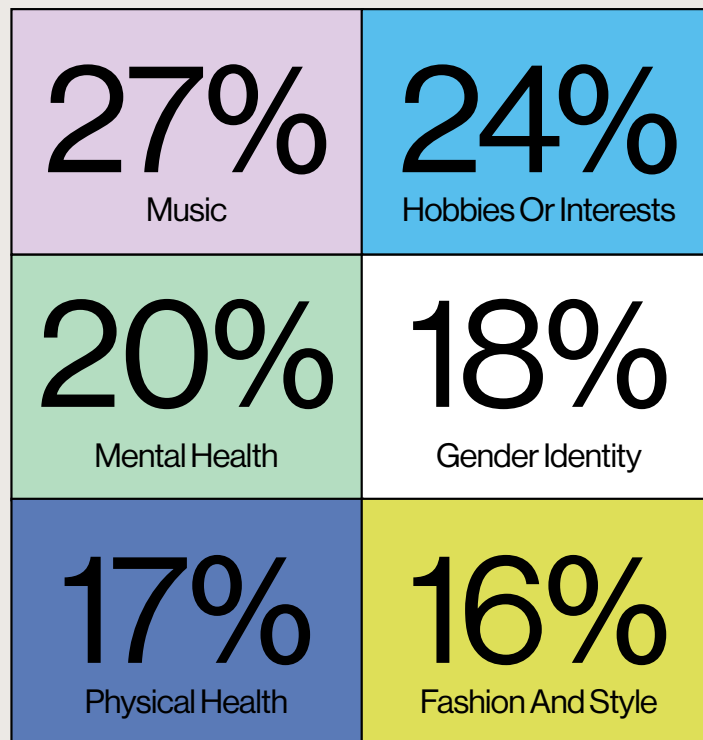
Identity Perceptions



Music to their ears – over a quarter of the Youth claim music has a huge influence on who they are, vs 16% for fashion and style



Respondents who claim the following factors have a 'huge' influence on who they are



30% of females claim that music has a huge influence on who they are

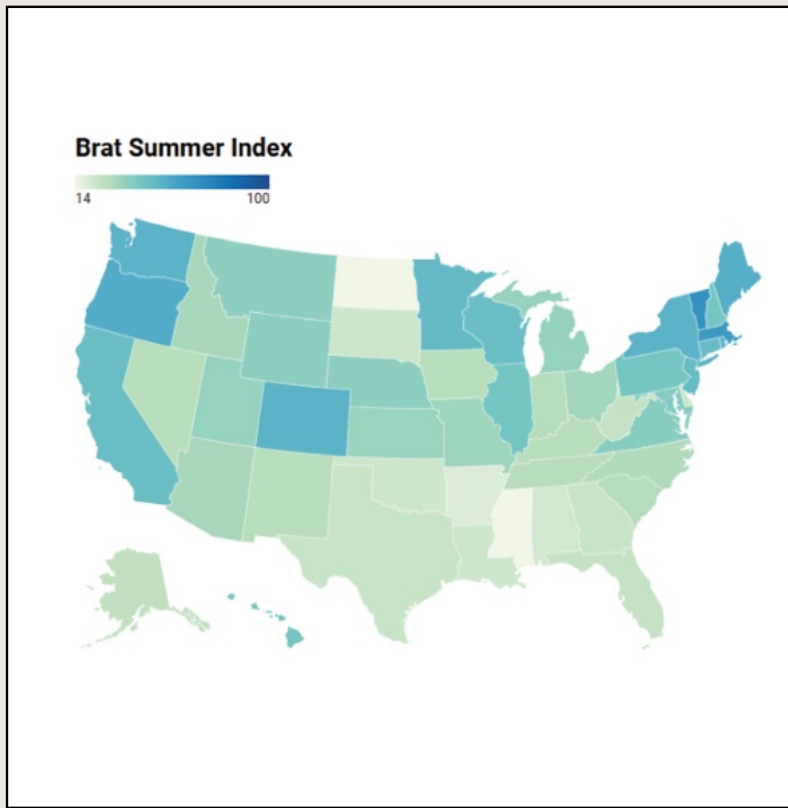


Whilst females over index compared with males in relation to the above, males are more likely to agree that they are more likely to wear a brand if its supported or worn by a musician they love. This suggests that female identity in relation to music is not formed so much by dress but more in terms of who they are as a person.

21% of females stated fashion and style had a huge influence on who they are

Females are more influenced by fashion and style. The youth call out female fashion influencers including Chiara Ferragni, Camila Coelho, Kim Kardashian and Emma Chamberlain as influential for them.

Coastal locations were more engaged in Google searches for 'Brat Summer' in the past 12 months



28% of respondents from the South claim that music has a huge influence on who they are

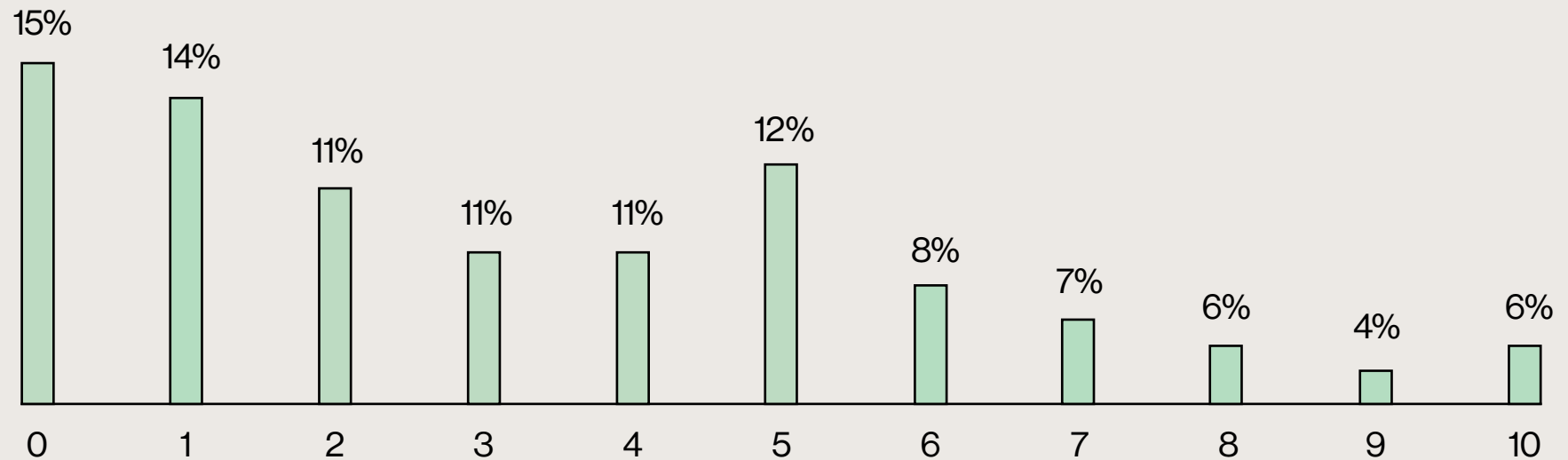
Whilst respondents from the South are slightly more likely to claim that music has a huge influence on who they are, they were less engaged than other regions when googling the term 'Brat Summer'. Coined by famous musician Charli XCX, 'Brat Summer' refers to a movement, which dominated Summer 2024, and consisted of party-girl antics.

Some of the favorite musicians commonly mentioned among respondents in the South are; Tyler the Creator, Rihanna, NBA Youngboy, Ariana Grande, SZA and Bad Bunny. This suggests that whilst Charli XCX may not appeal to those as much in the South, similar movements by such artists could transform the identity of these respondents.

15% of the youth claim political views and activism has no relevance to their identity, rising to over a quarter among Gen Alpha



Political views or activism: How much does each of the following shape your sense of who you are? Please use the slider to show how big a role each plays in your identity, where 0 is not a part of my identity at all, and 10 is a huge part of my identity.

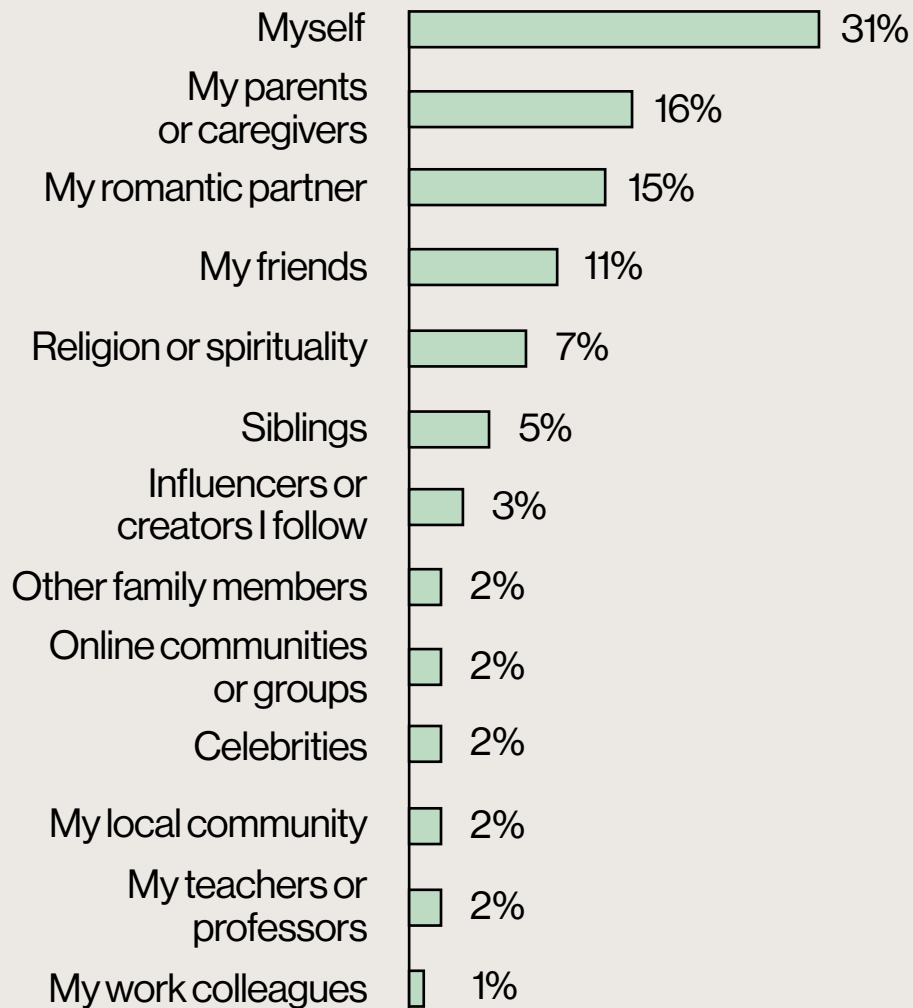


A lack of affiliation with politics leads to a diminished turnout at the presidential election in 2024 vs 2020

Voter turn-out among young people (18-29) dipped between 2020-24, as the demographic show weak affiliation with politics.

The youth are reluctant to be molded by external factors.
Political views or activism: How much does each of the following shape your sense of who you are?

Identity Perceptions



The youth are dissatisfied with external influences

The focus on self-influence points to a wider dissatisfaction with other spheres of influence and/or role models. As identity has become so fragmented, with so much accessibility and freedom to embrace varying sub-cultures, the youth have become more inclined to rely on themselves to form their own identity, rather than conform to any societal norm. It also underscores the notion of 'rugged individualism' and the prevalence of this in a US context, driven by the expansiveness of the country which is comprised of many cultures and operates across multiple time zones. This backdrop has meant that the US is arguably less unified and means that the youth are increasingly self-dependent.

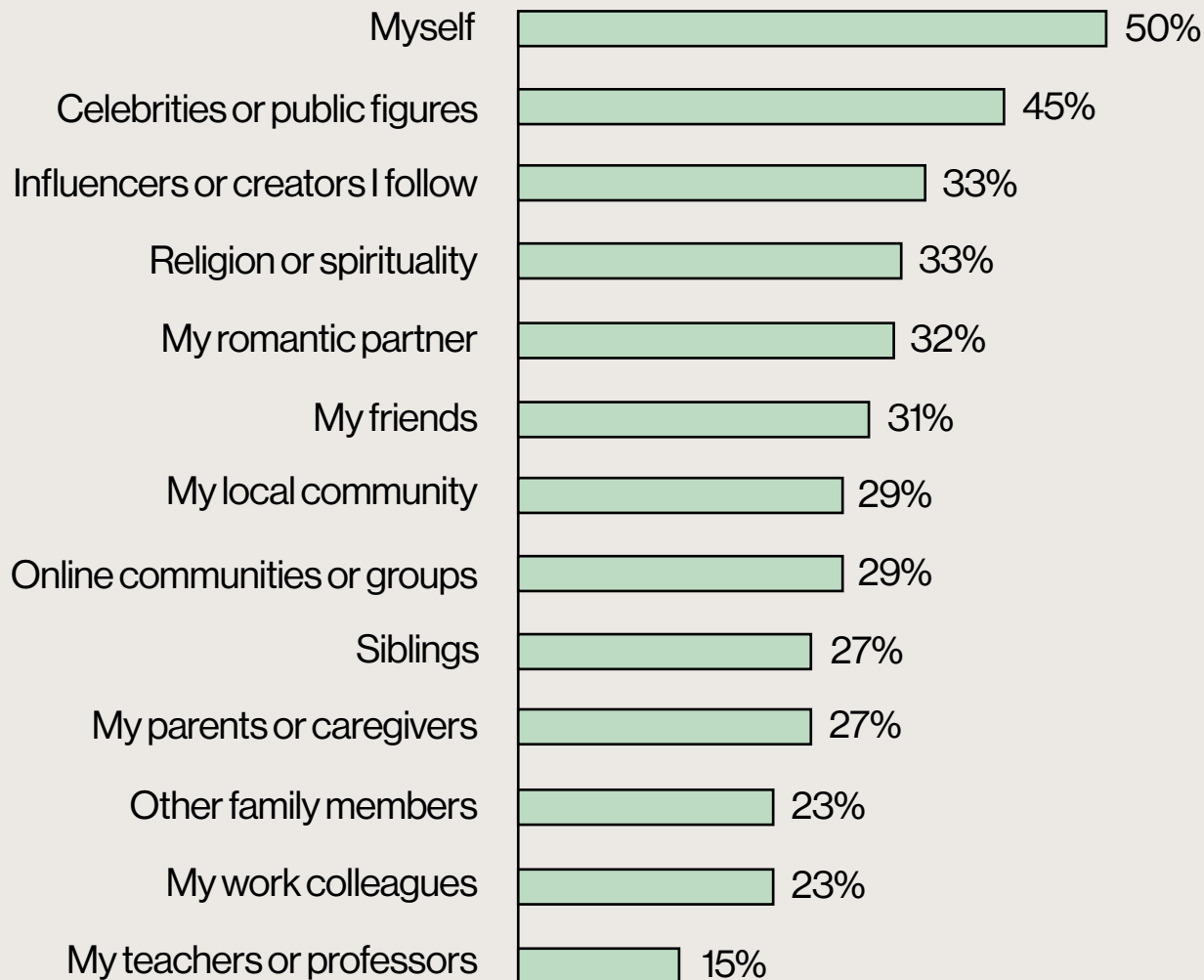
Teachers/professors may struggle to influence the identity of their pupils

A very small proportion (2%) of the youth claim that teachers/professors have the biggest influence on them right now. This aligns with the above to an extent in that the youth are dissatisfied with the influences available to them and could suggest that this demographic view teachers and professors as too authoritarian.

Celebrities and influencers have the greatest influence when it comes to how the youth dress



Respondents who claim that the below factors impact how they dress



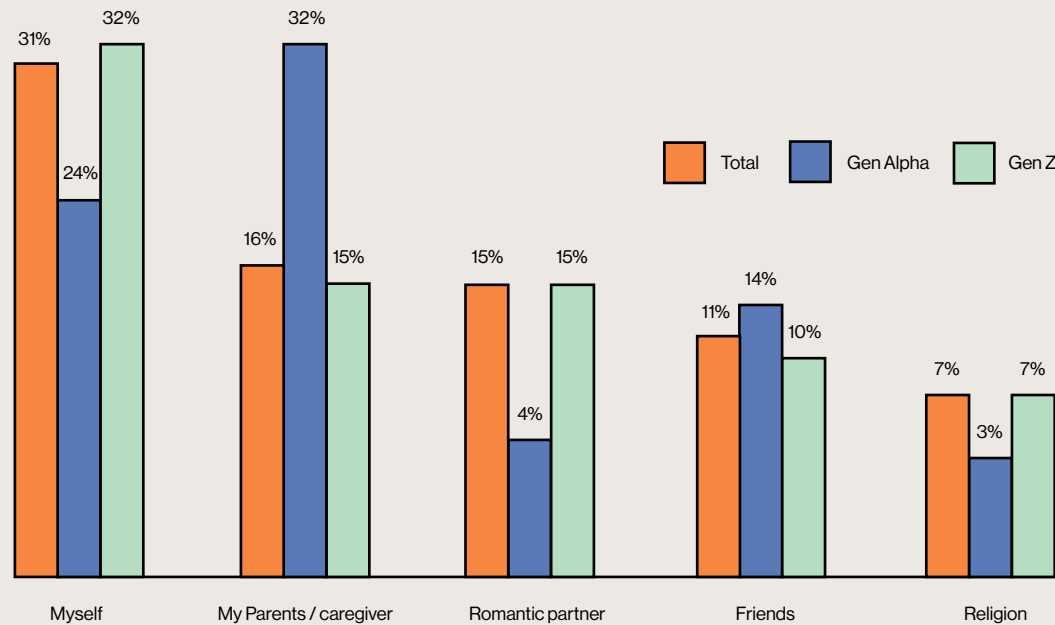
70% of Gen Alpha say celebrities/public figure influence how they dress

Despite influencers becoming increasingly popular due to their comparative relatability, celebrities or public figures are still more influential when it comes to how the youth dress, particularly among Gen Alpha. The lines between celebrities and influencers continue to blur, with larger-scale influencers benefiting from a somewhat 'celebrity' status whilst social media savvy celebrities are also often viewed as influencers too. The most mentioned celebrities or public figures to have influenced respondent style in the past 12 months were; Rihanna, LeBron James, Drake, ASAP Rocky, Kylie Jenner, Sabrina Carpenter, Hailey Bieber and Lady Gaga. However, the likes of Alix Earle and Charli D'Amelio, who are arguably predominately influencers also frequently cropped up, reflecting that blurring of lines.

Gen Z claim to be more self-influenced, compared with Gen Alpha

Identity Perceptions

Who, or what, has the single biggest influence on you overall right now?



Influence shifts away from parents / caregivers and towards romantic partner with age

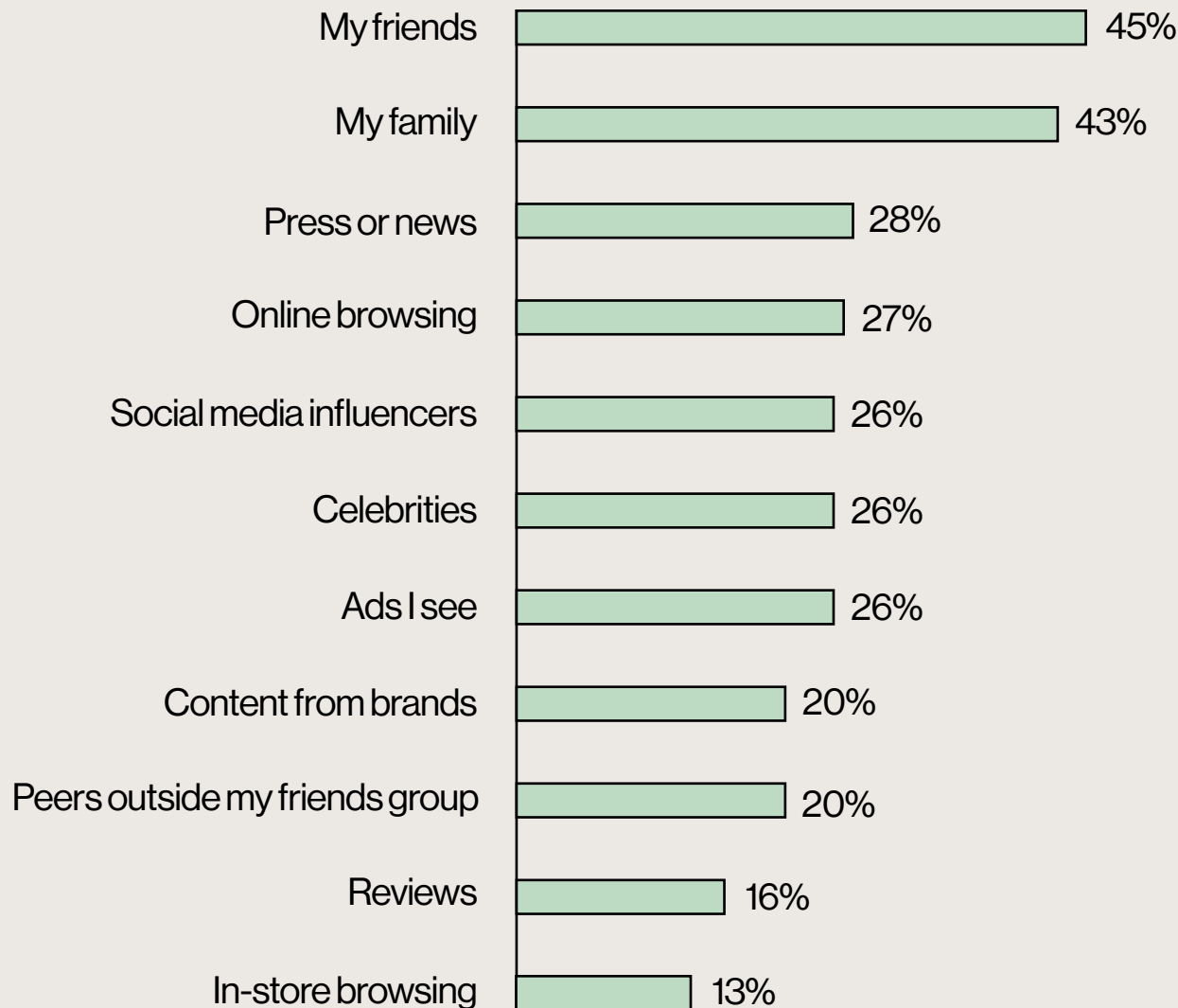
Gen Alpha are more likely to claim their parents/caregivers have the most significant impact on them right now. Whilst Gen Z are comparatively more likely to state the same in relation to romantic partner, indicating how relationships evolve with age.

Gen Z claim to be self-influenced

Gen Z are reluctant to accredit varying spheres of influence as having an impact on them, compared with Gen Alpha, of whom are in their much more formative years, typically less confident and are more likely to be looking outside of themselves for support and/or guidance. Additionally, when considering platforms such as Roblox and Minecraft, these are often extremely collaborative, involving interactions with others, with these forums likely to influence that reliance on external factors.

Friends and family are influential when it comes to sports

When it comes to sports, who or what influences you most?



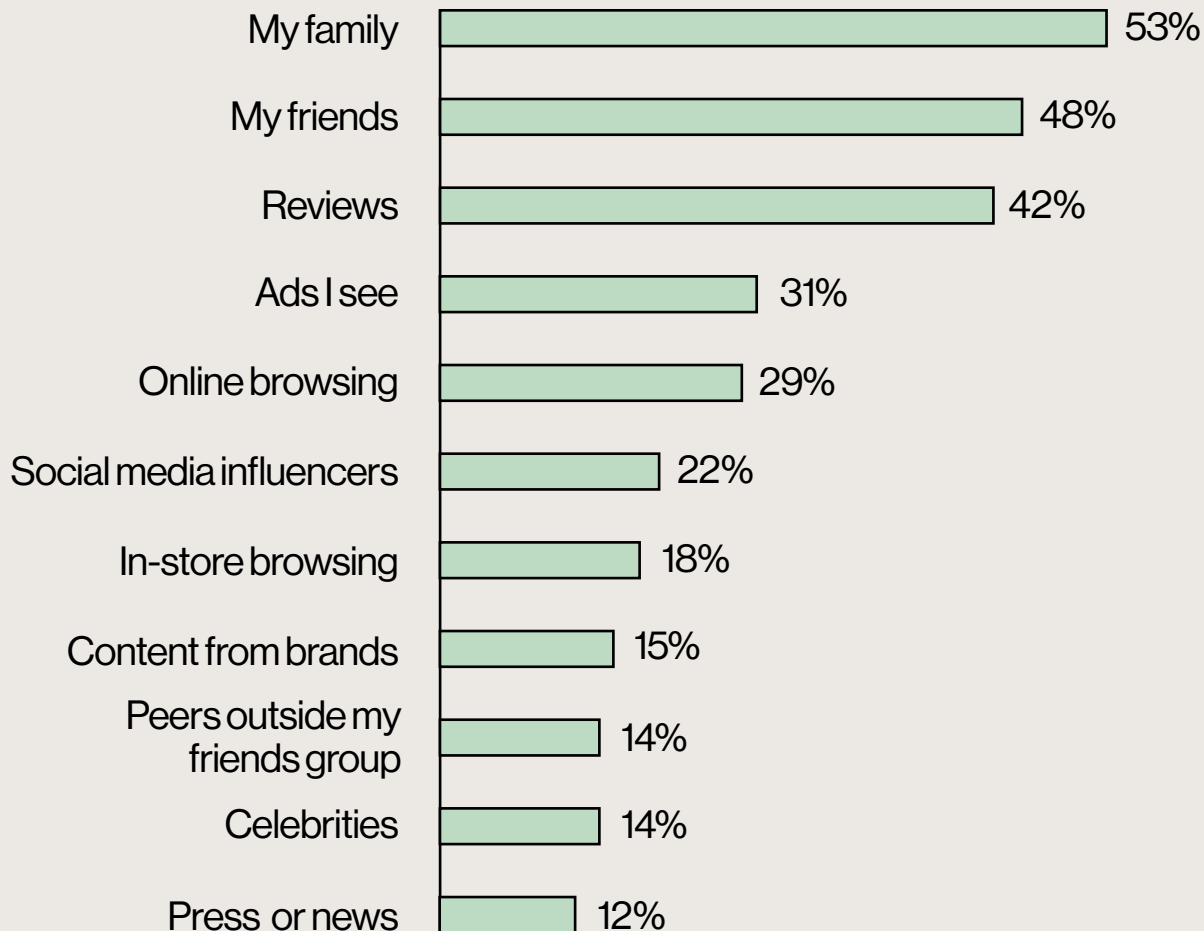
The Youth are influenced by friends and family when it comes to sports

Friends and family have a significant influence when it comes to sports, with the youth naturally gravitating to sports that loved ones enjoy. The youth are also influenced by sports in relation to fashion, with one in four (40.3%) either strongly agreeing or just agreeing with the statement 'Communities I'm part of, e.g. sports teams, influence my style.'

Family is pivotal when it comes to restaurant influences, with this reflecting spend behaviors

Identity Perceptions

When it comes to restaurants, who or what influences you most?



Over half agree that family is influential when it comes to restaurants

This reflects the fact that the youth are still somewhat reliant on parents when it comes to making decision around leisure spend, and more specifically where to eat.

Style Inspiration



—▶ Insights into style inspiration among the youth

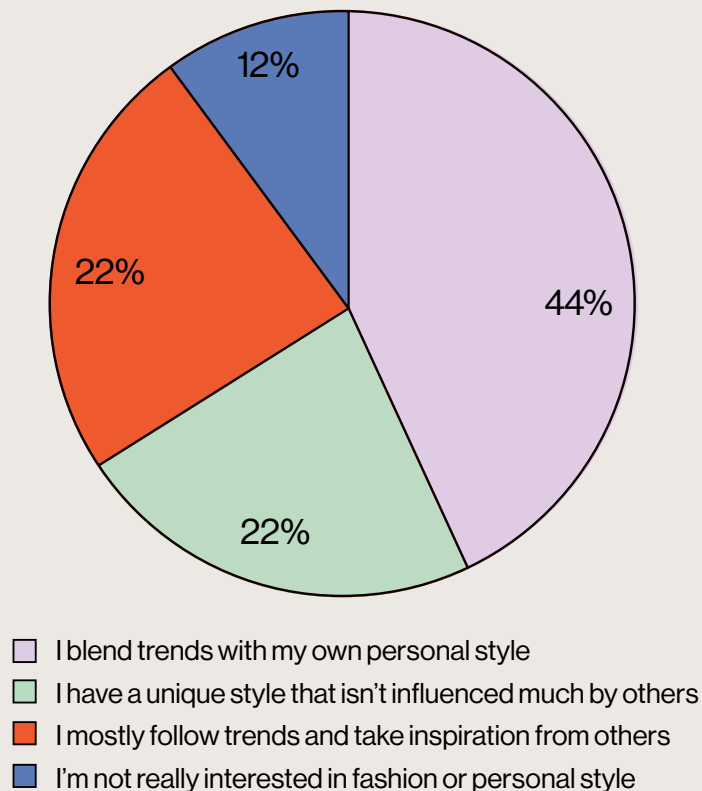


Style Inspiration

A desire to stay current and fashionable encourages following of trends

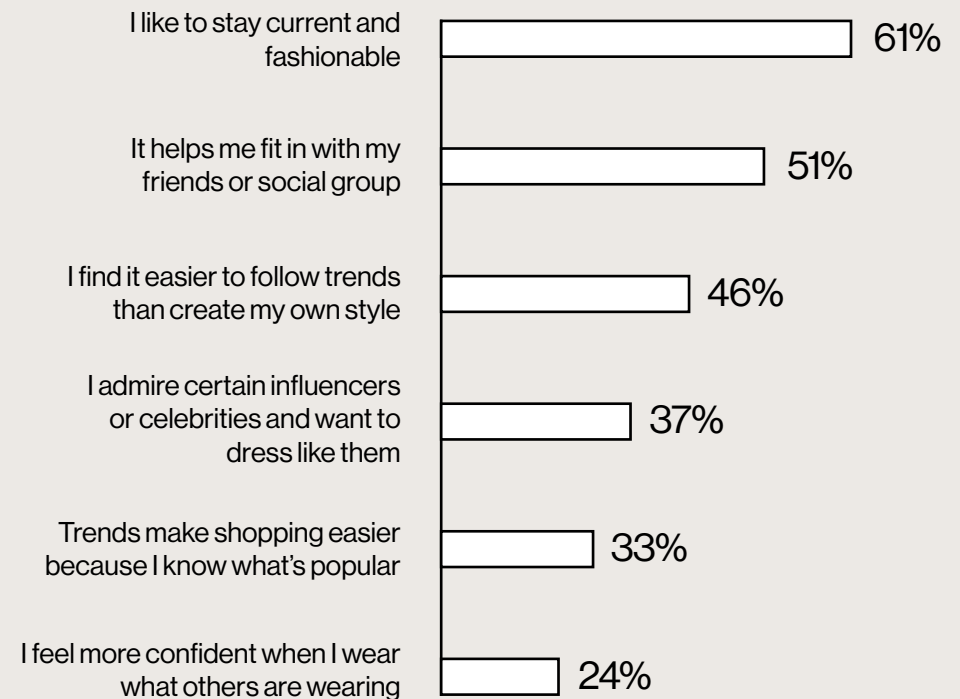
When it comes to fashion, which statement best describes you?

Following of trends overlaid with incorporating personal style is common



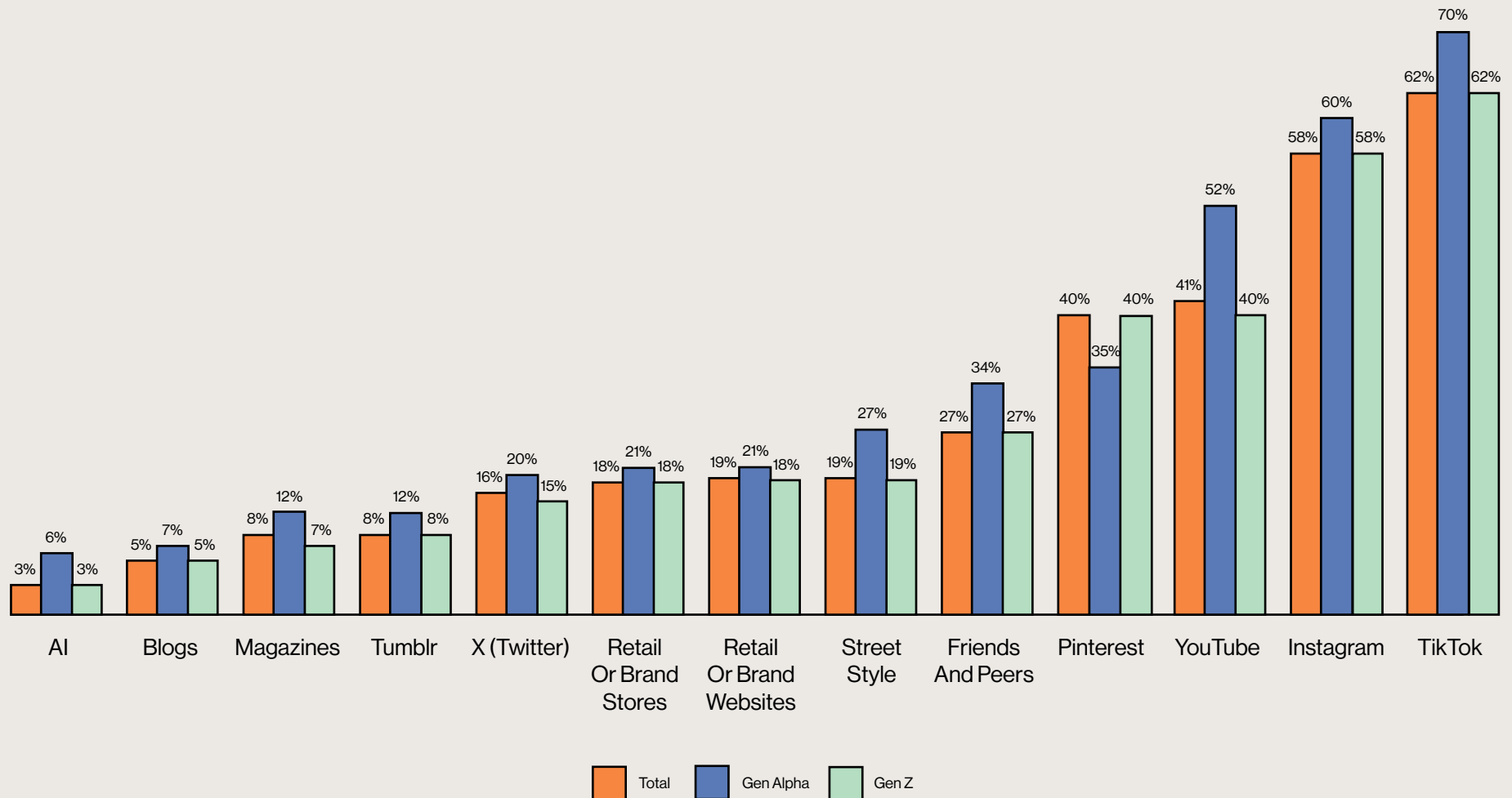
You said you mostly follow fashion trends and take inspiration from others, why is this?

Fitting in with friends and a desire to stay current/fashionable motivates following of fashion trends



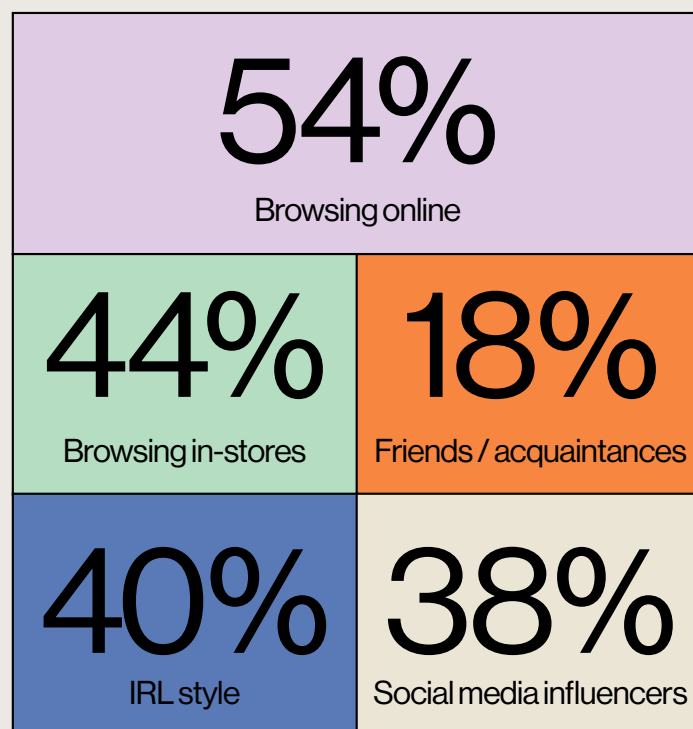
Gen Alpha rely on TikTok for fashion inspiration

Where do you typically go for fashion inspiration?



Online browsing beats in-store when it comes to discovery in fashion

How do you usually discover new clothing styles or fashion brands?



Online browsing is more popular than in-store across all demographics

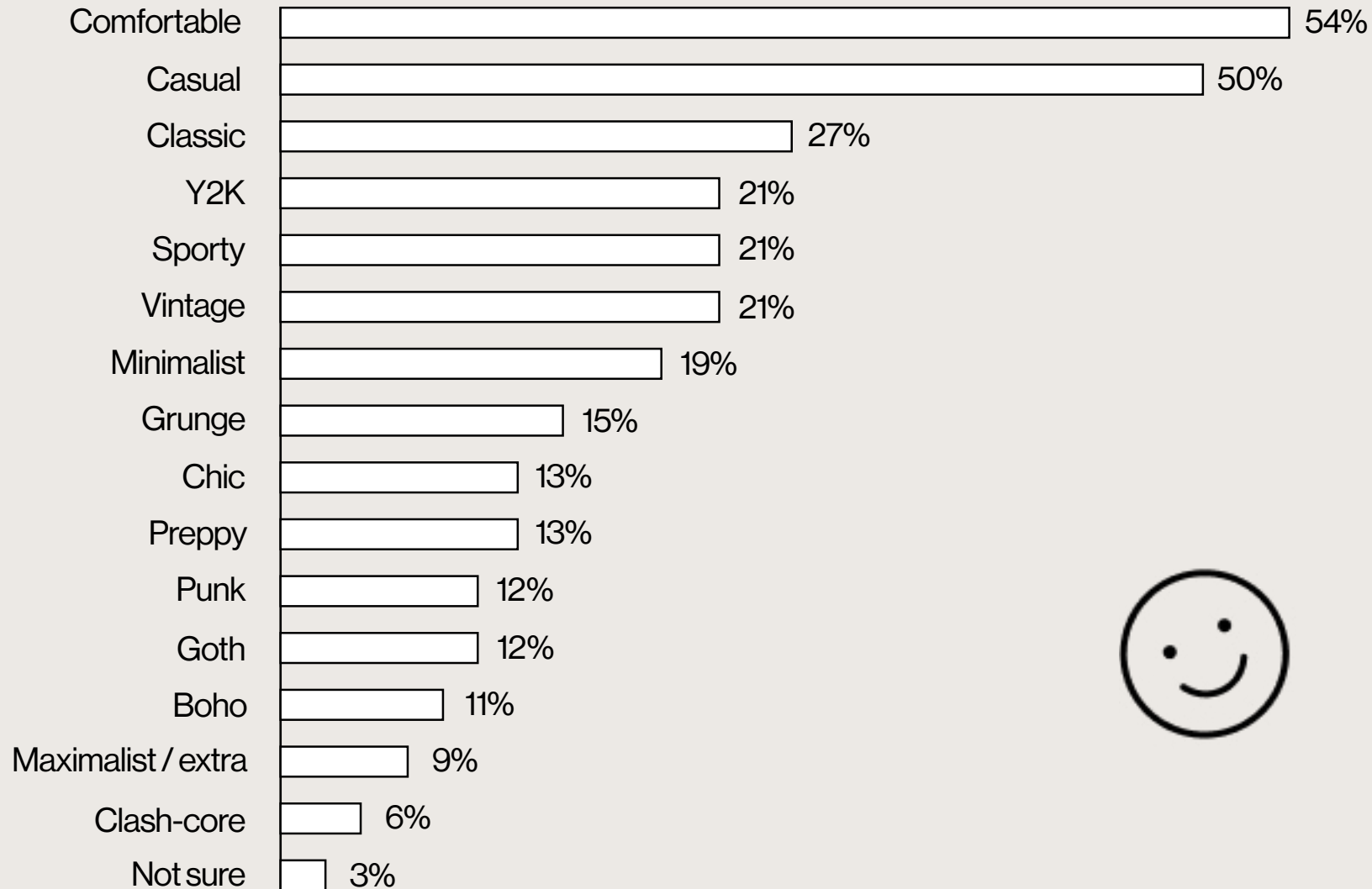
All demographics are more likely to discover new clothing styles or fashion brands by browsing online, compared with in-store, highlighting the ease and appeal of the channel.

42% of Gen Alpha respondents discover new clothing styles or fashion brands through social media influencers they follow

The fact that Gen Alpha over index when considering the influence of social media influencers on fashion discovery indicates that the 'influencer effect' is far from dying out, and once again represents Gen Alpha's comparative willingness to be influenced, compared with Gen Z.

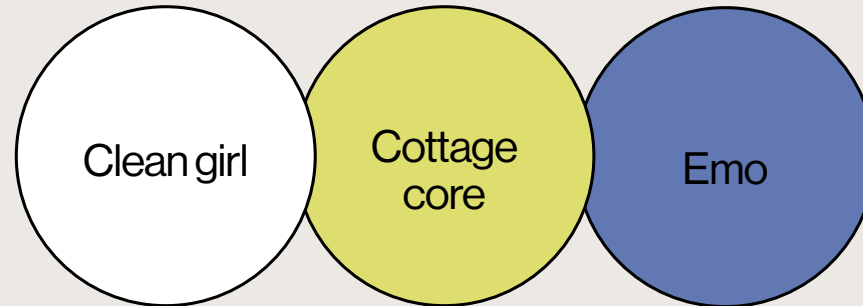
Comfort and casual are synonymous with personal style

How would you describe your personal style?

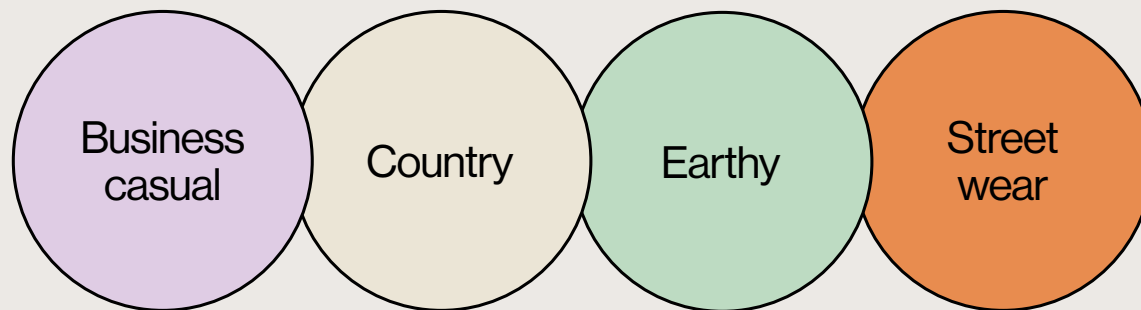


How would you describe your personal style?

Style Inspiration

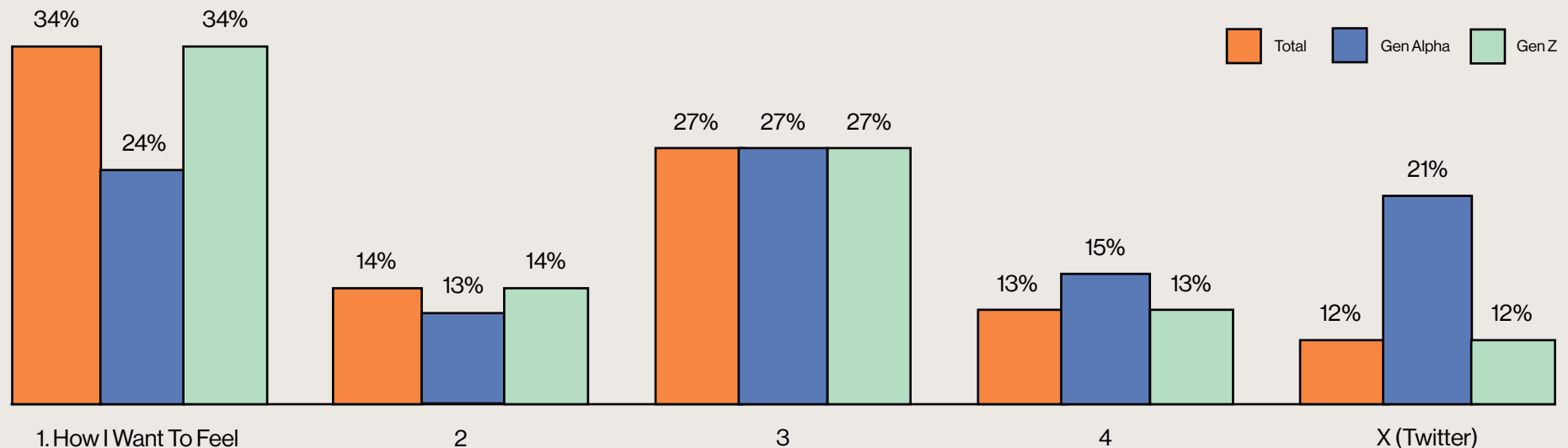


“It honestly depends on the season.
In the Spring / Summer I’m Cottage Core and
70s vibes, and in the Fall / Winter I’m
Dark Academia”



Gen Z dress based on how they want to feel, Gen Alpha dress based on how they want to be seen

When shopping for clothes, do you think more about how it makes you feel or how you want to be seen by others?



Gen Alpha care more about dressing to be seen

Gen Alpha, who have grown up in a social-media dominated world, are more focused on dressing to be seen, as opposed to in accordance with how they want to feel. This aligns again to the idea that Gen Alpha are in their more formative years and are more focused on fitting in. Whereas Gen Z are slightly older, have had more life experiences, such as being more conscious through the Pandemic years, and comfort and/or feeling more broadly therefore comes ahead of aesthetics.

Active fashion blog followers are more likely to shop according to how they want to be seen, vs how they want to feel

Style Inspiration

When shopping for clothes, do you think more about how it makes you feel or how you want to be seen by others?

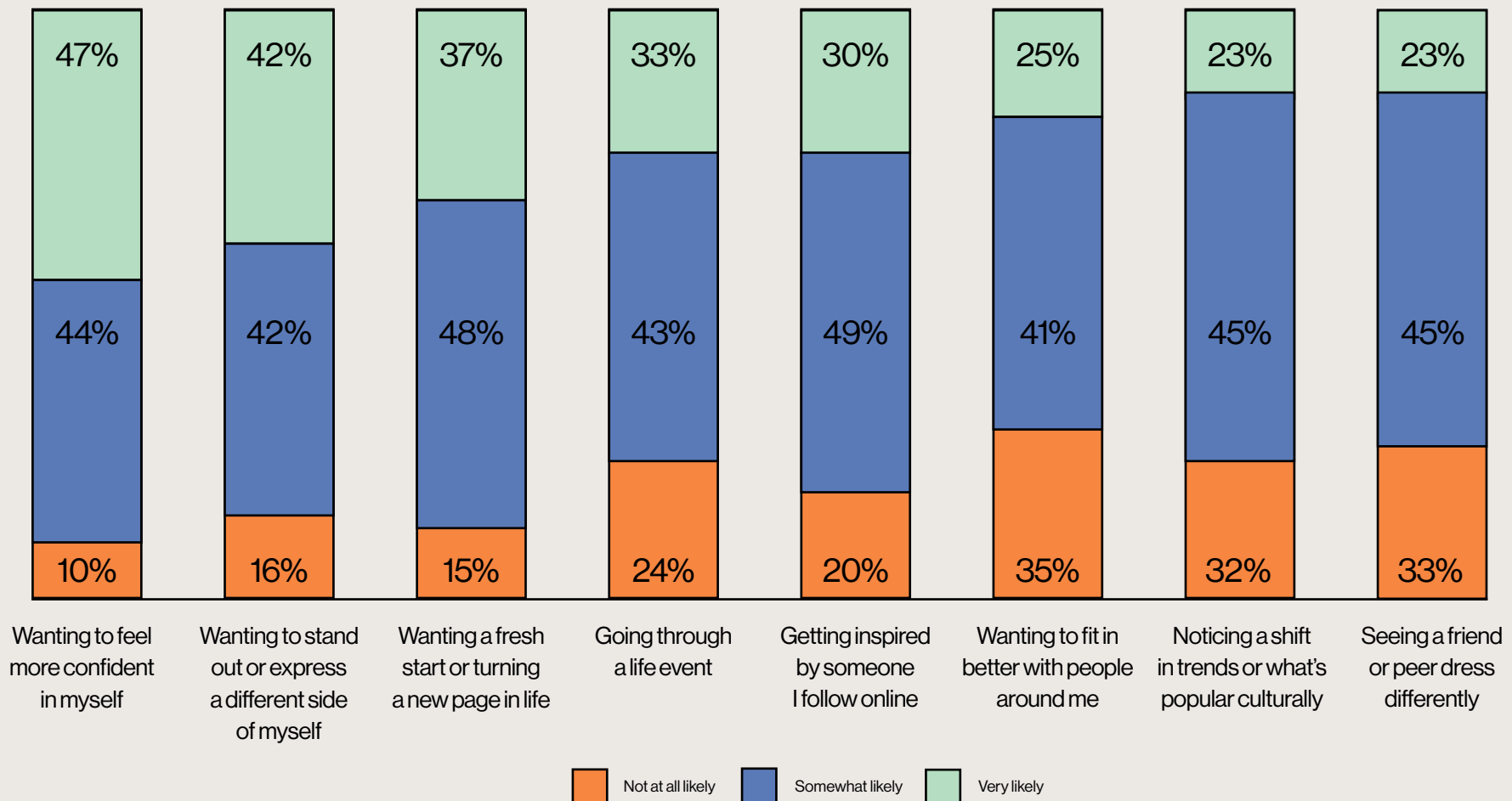
	Total	I don't really follow trends at all	I don't really go looking - I just pick up on what's trending from what shows up in my feed	I check social media or search when I want to see what's trending	I actively follow trend reports, blogs, or fashion pages to stay ahead
1. How I want to feel	34%	47%	33%	29%	33%
2	14%	13%	17%	14%	10%
3	27%	25%	32%	28%	16%
4	13%	6%	11%	17%	15%
5. How I want to be seen	12%	10%	8%	11%	26%

Fashionistas place aesthetics above comfort

Of those who actively follow trend reports, blogs or fashion pages, 26% claim they choose clothes based on how they want to be seen (vs 12% overall). Similarly, those who don't follow trends at all over index when it comes to prioritizing how they want to feel when shopping for clothes.

A desire to feel confident is most likely to influence a change in personal style

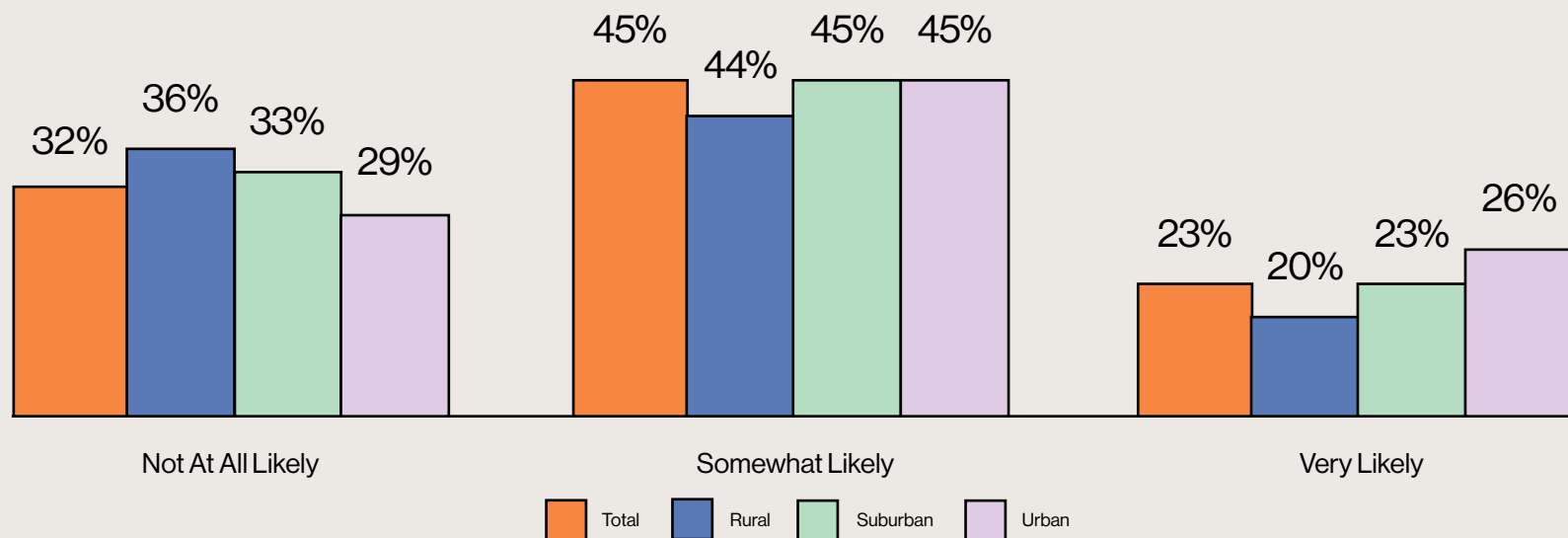
How likely is each of the following to influence a change in your personal style?



Urban dwellers are more likely to shift their style based on what's culturally popular

Style Inspiration

Noticing a shift in trends or what's popular culturally: How likely is each of the following to influence a change in your personal style?

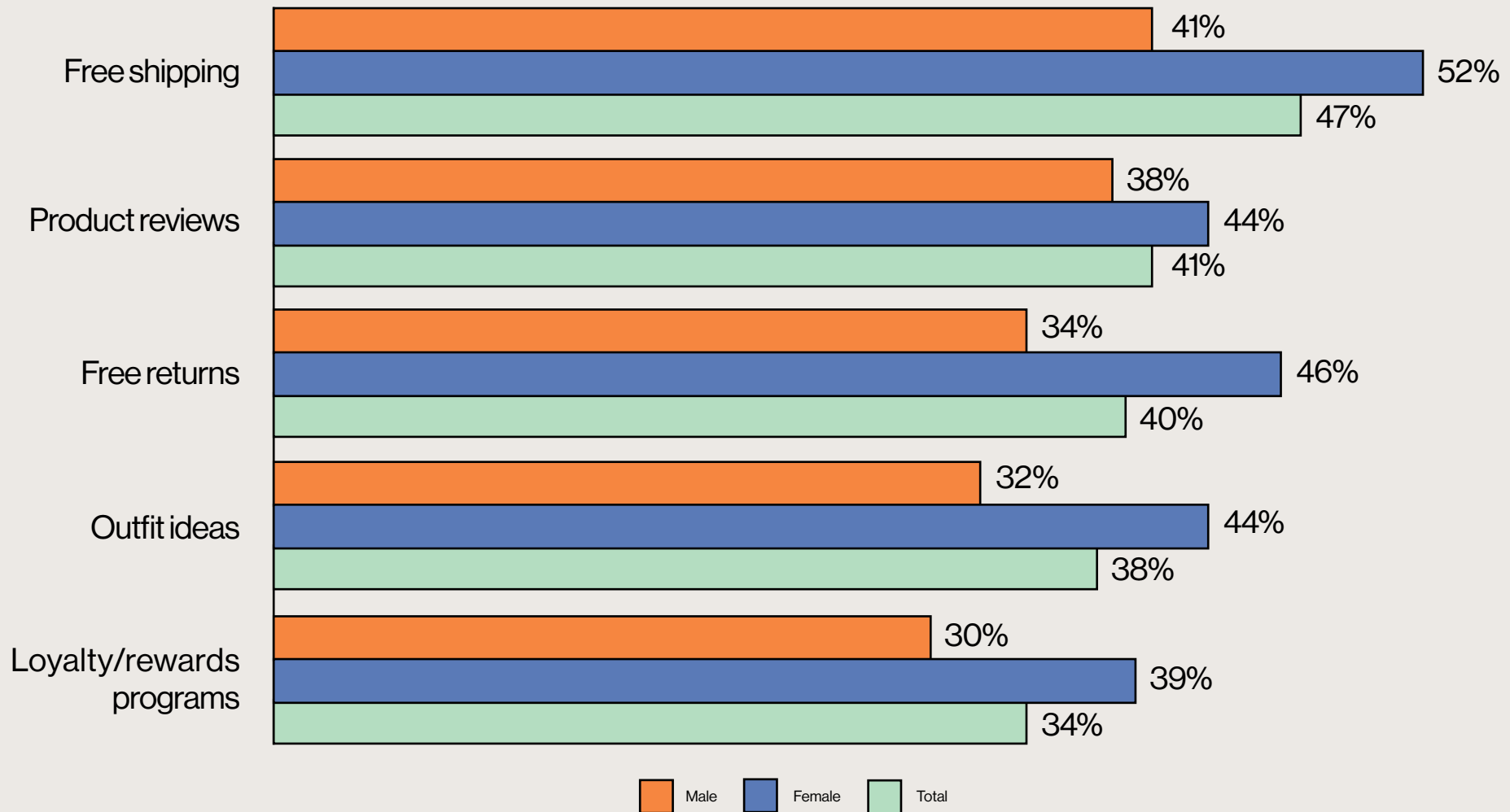


Those in rural locations are less likely to change their style due to a shift in trends

Respondents from rural locations are less likely to alter their personal style based on what's trending. This can also explain the fact that 27% of respondents from rural locations claim to not really use fast fashion sites (compared with 22% overall) as limited motivation to buy into changing trends means that those living in rural locations will be more likely to invest in longer-term pieces, rather than needing to prioritize more accessible trend-led clothing. This discrepancy also aligns with a lack of fashion inspirations among those in rural areas, with less frequent fashion-led occasions also hindering interest in what's trending.

Females are more likely to expect fashion brands to provide loyalty/rewards programs

Which, if any, of the following, do you expect fashion brands to provide?

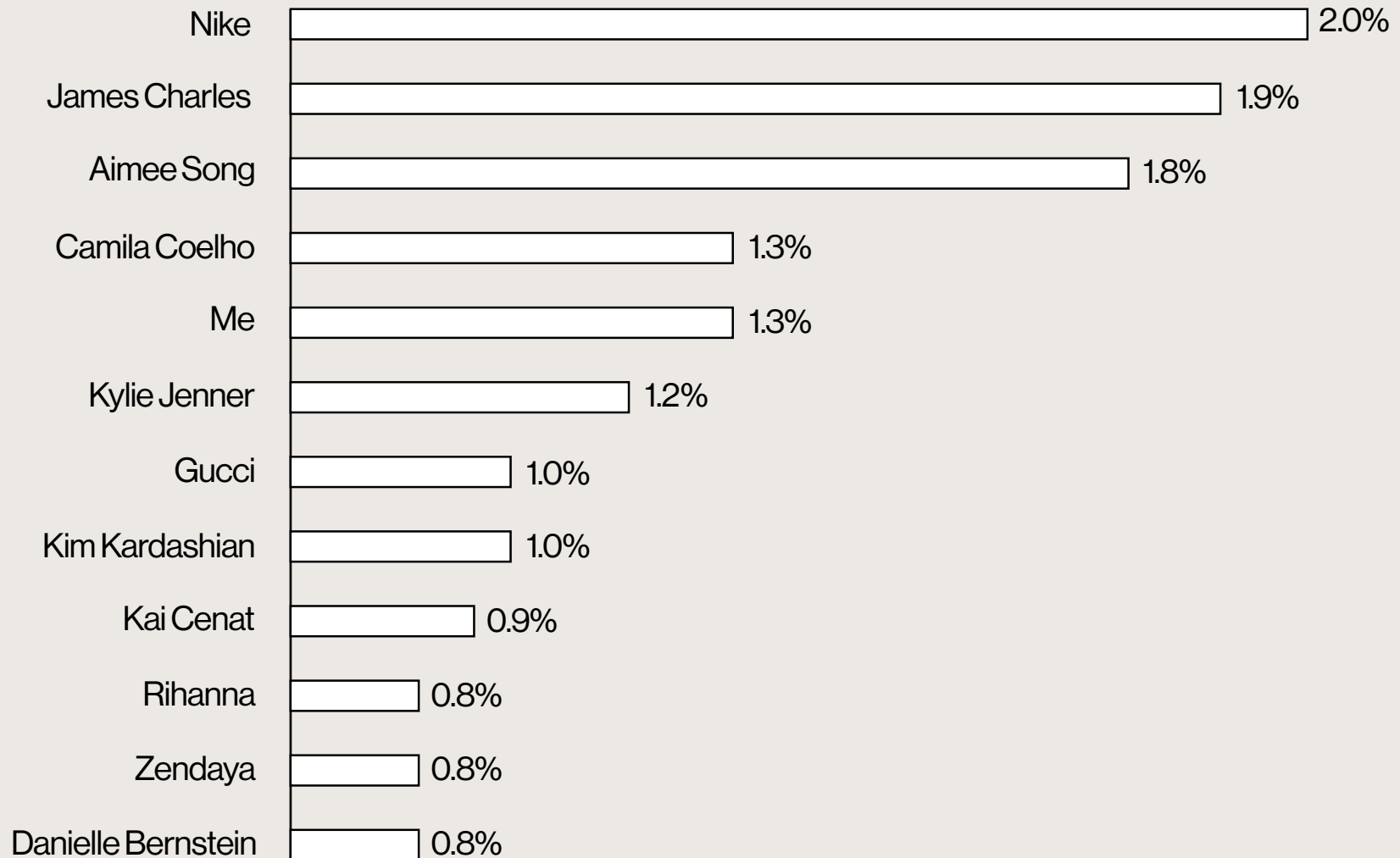


The Youth claim to be fashion influencers themselves

Style Inspiration

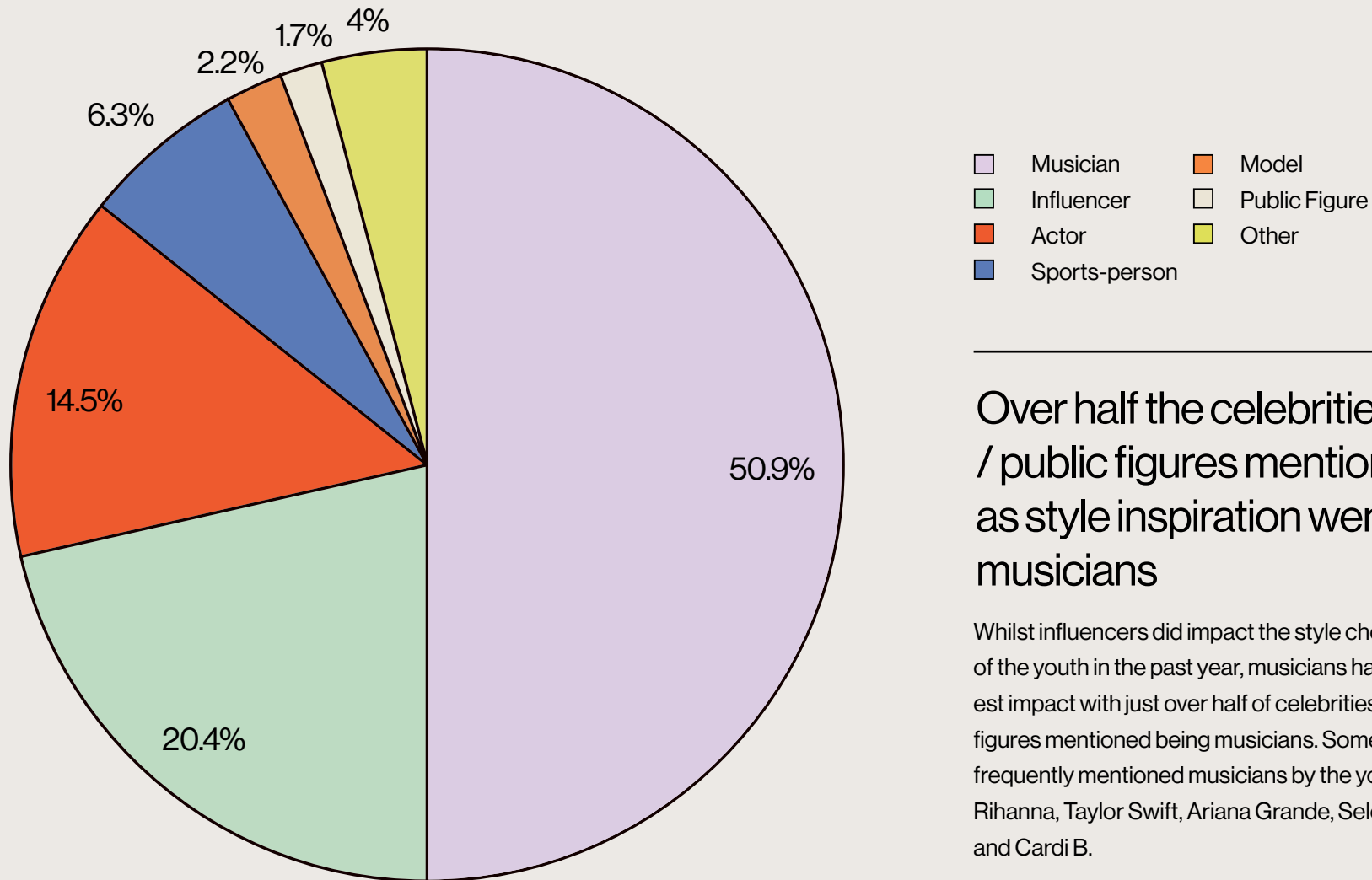


Who are the top fashion influencers you can't live without?



Musicians over index as top influence for style inspiration

Which celebrities or public figures influenced your style in the past year?



Which celebrities or public figures influenced your style in the past year?

Note: the larger the font, the more frequently the celebrity/public figure was mentioned as a favorite.



Discovery



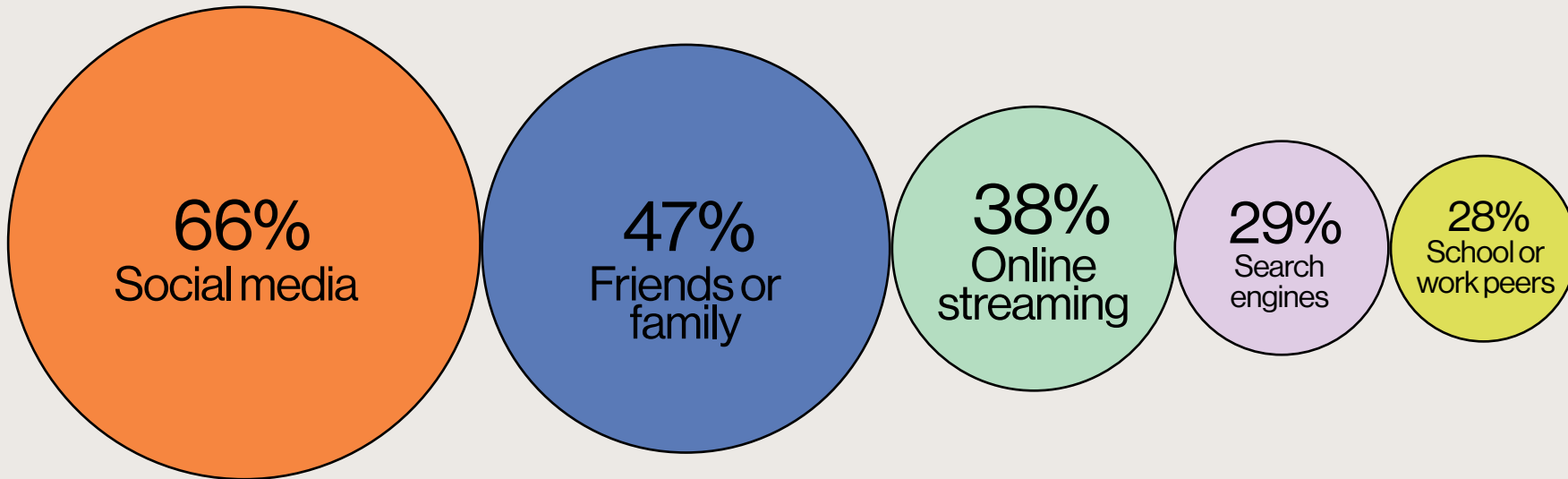
—▶ Insights into methods of discovery among the youth



Discovery

Social media fuels discovery when it comes to current events and pop culture

Where do you usually go to keep up with current events or pop culture trends?

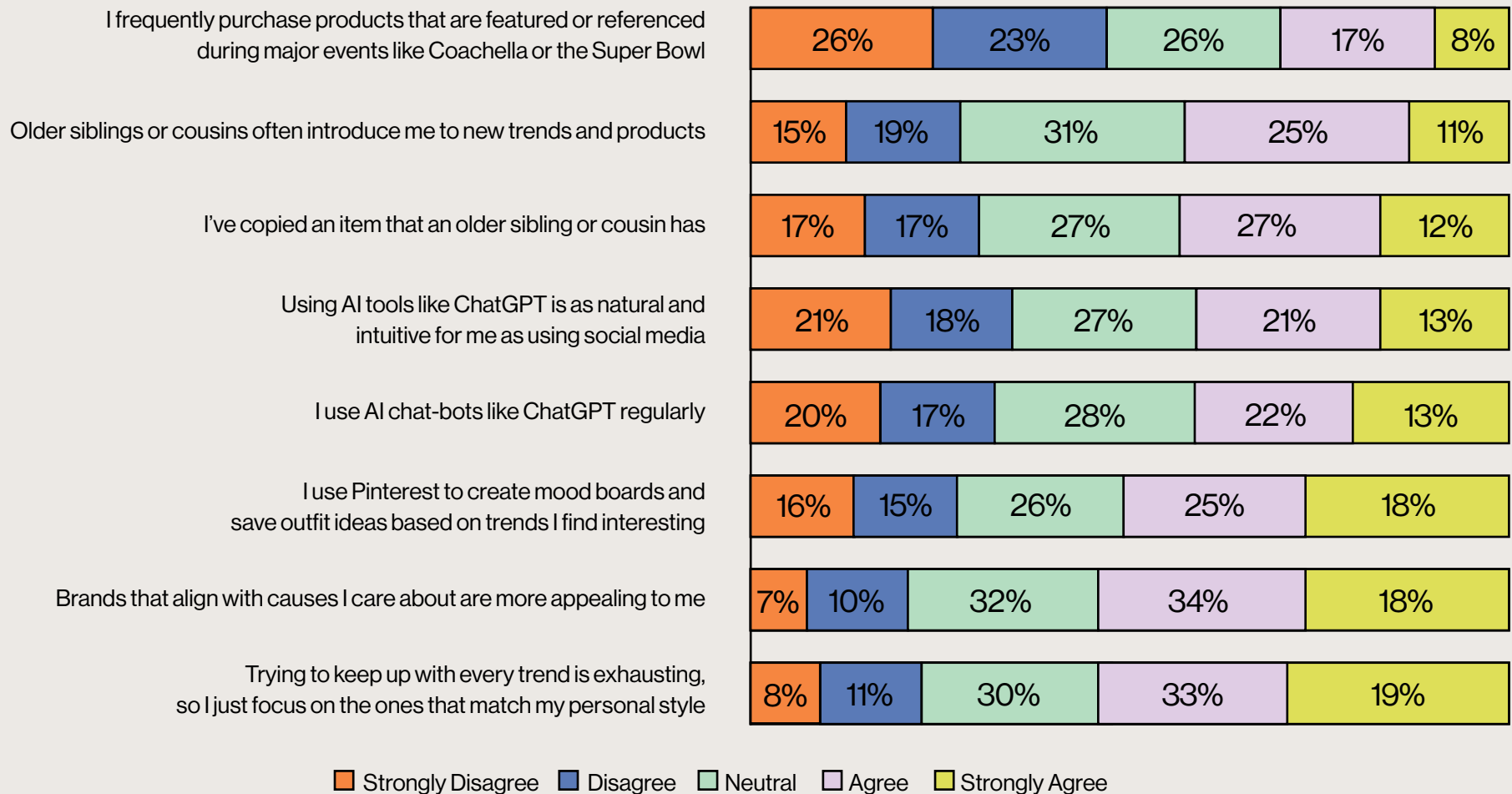


#News has 14.5 million posts on TikTok, as of June 2025

Social media is the main place whereby the youth opt to keep up with current events or pop culture, with TikTok being a 'go to' platform for the demographic. However, the platform is riddled with a wealth of misinformation. For example, there's been a recent narrative around luxury goods, such as handbags, being made in the same factories as their 'dupe' equivalent. Whilst this is untrue, this narrative will have placed doubt in the minds of prestige consumers. Whilst luxury handbag buyers may not be TikTok's core user group, such narratives can spread fast through word of mouth too, perpetuating the problem and damaging the reputation of luxury brands.

The influence of major events, like Coachella or the Super Bowl, on spend activity is polarized...

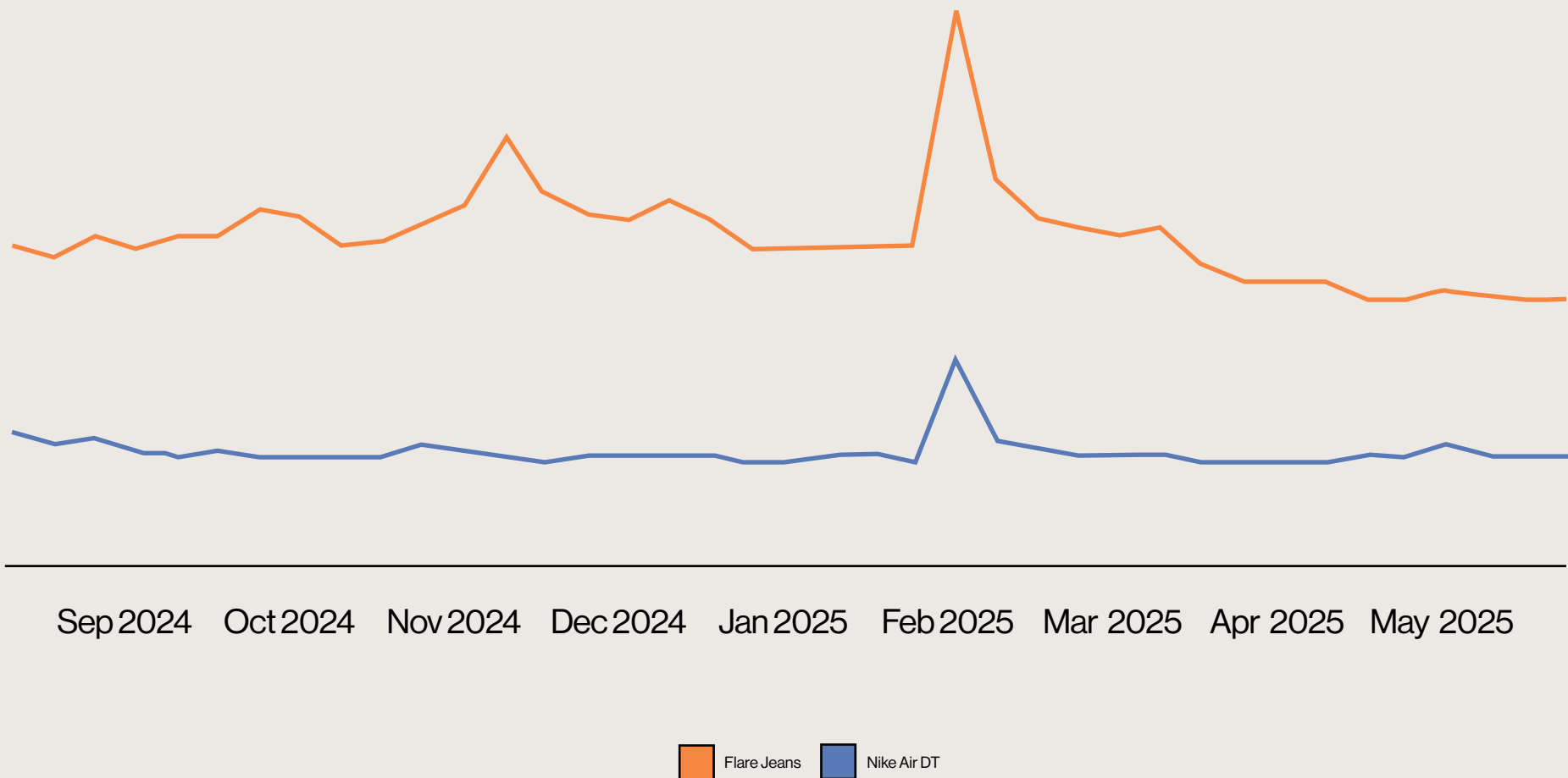
A quarter of the youth agree they have purchased products featured at such events, whilst 26% strongly disagree.



...but the Super Bowl cannot be ignored for its traction

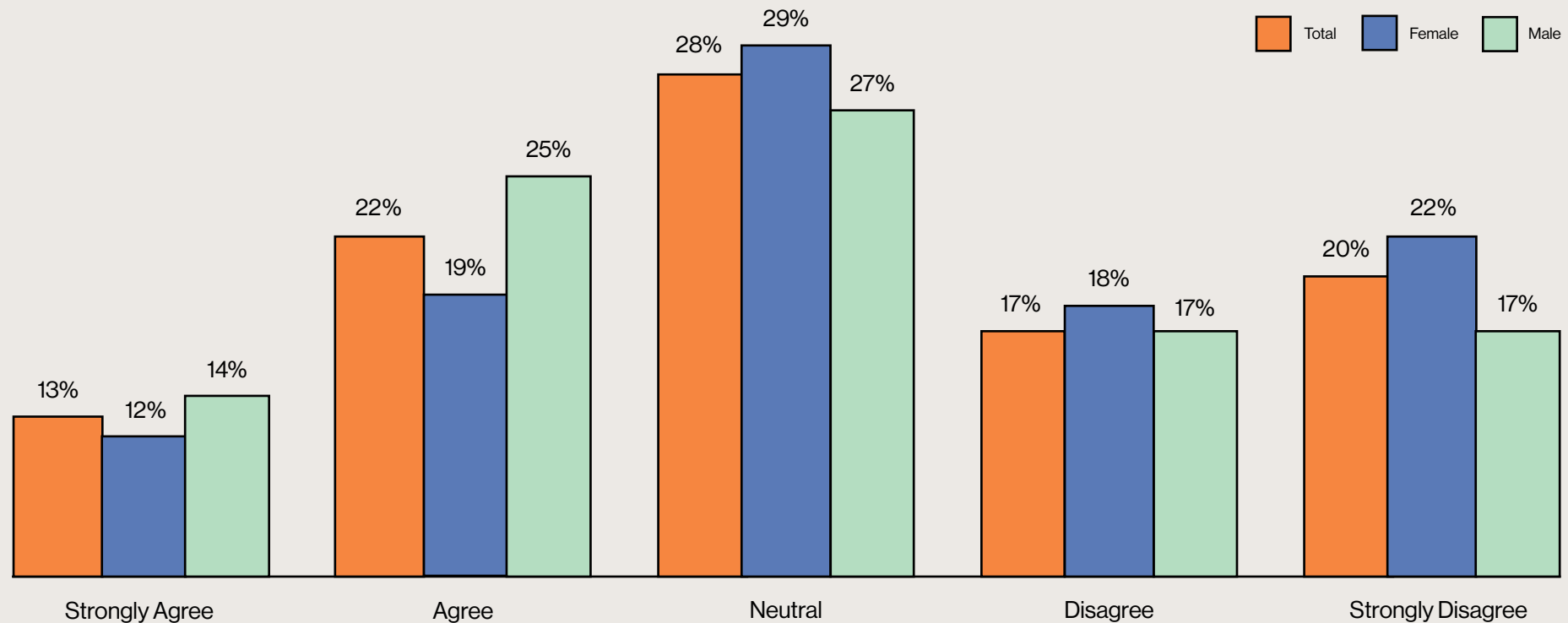
Discovery

Following Kendrick Lamar's sporting of flared jeans and Nike Air DT Max's at the Super Bowl, Google Searches of both items skyrocketed in February 2025, signaling the impact of such events in generating traction within fashion.



Males are more likely to be using ChatGPT regularly

'I use AI chat-bots like ChatGPT regularly'



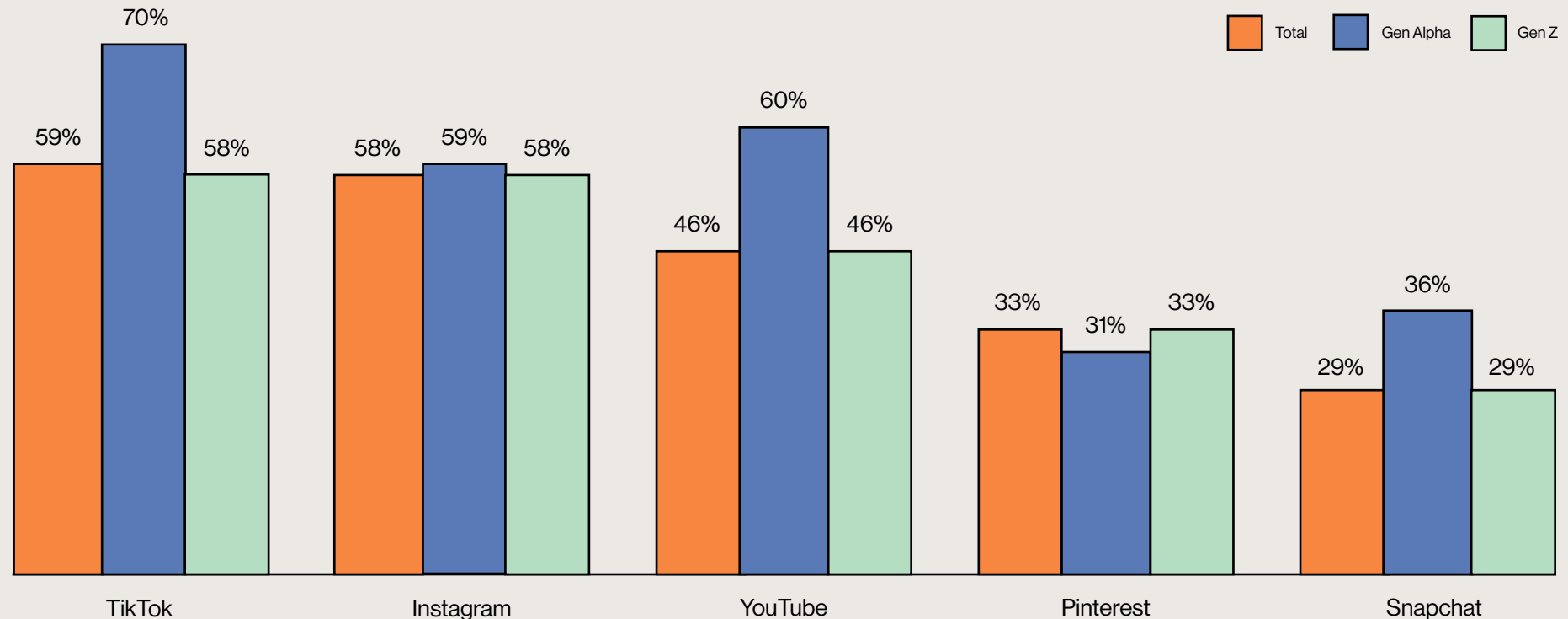
A gender divide persists in relation to AI

Females are less likely to regularly use ChatGPT, compared with males. Slower uptake could worsen the gender divide when it comes to areas such as employment and pay. History is clearly repeating itself, with females also being slower to adopt to usage of the internet when it first became mainstream. However, by the year 2000, female internet users had finally caught up with their male counterparts in terms of usage. Therefore, whilst it may take females slightly longer to become accustomed to Gen-AI tools such as ChatGPT, which could hinder opportunities in the short-term, this disparity will likely dwindle with time.

TikTok is a firm favorite for fashion-led discovery

Discovery

Which social media platform(s) do you rely on to stay in the know on current fashion trends?

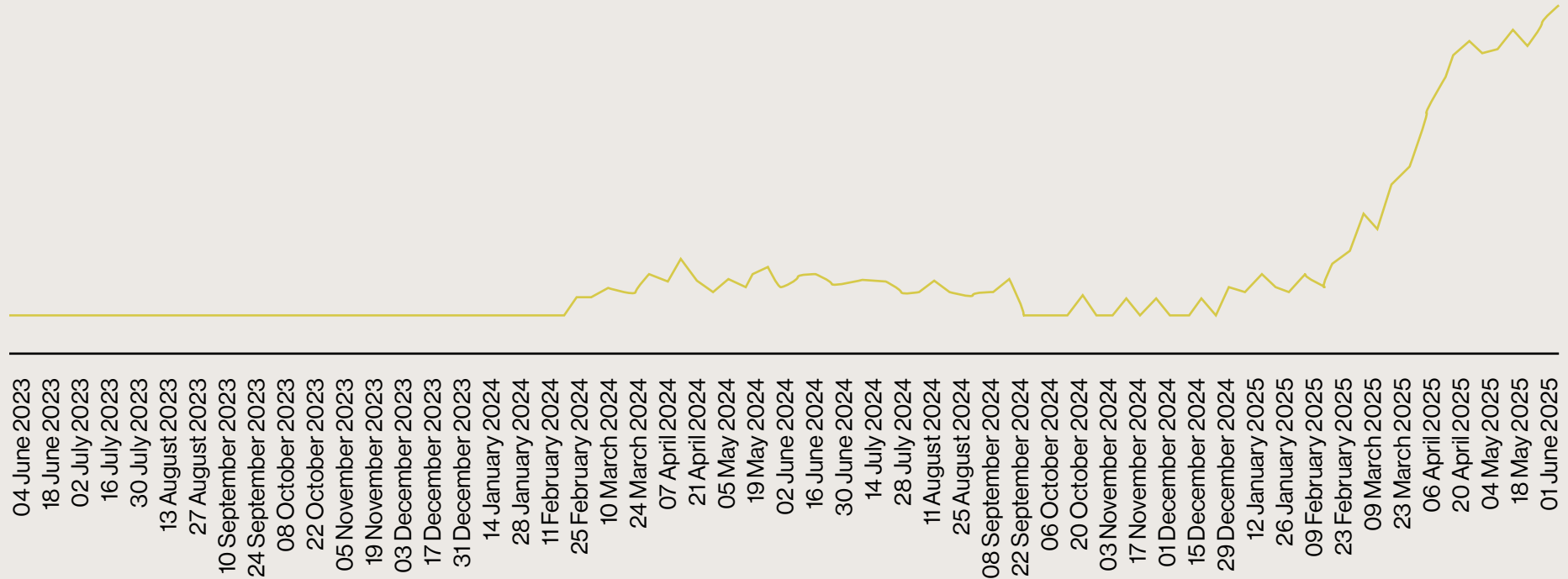


#TikTokFashion has over 13 million posts, as of June 2025

TikTok is the most popular platform for fashion-led discovery, particularly among Gen Alpha. The potential of a ban would therefore have significant impact for the fashion industry. The platform has catapulted certain brands to success, whilst other pre-existing brands have experienced massive wins thanks to the platform, whether that be through selling products via TikTok Shop or generating both brand and product visibility through content. Not only this, but the platform is responsible for many evolving trends such as 'Cottage Core' or the return of Y2K, with this generating spend activity among the youth more generally.

Butter yellow has a moment, thanks to TikTok

Google searches for 'Butter yellow dress' skyrocket in the US.

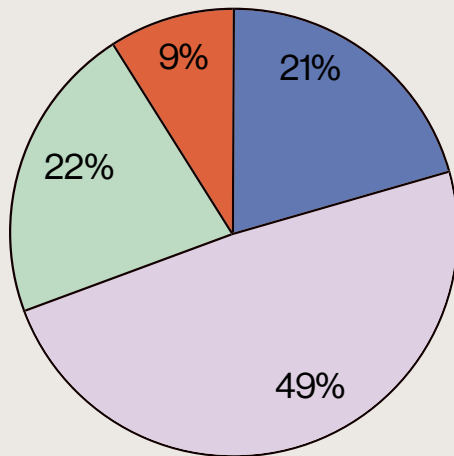


#HowToLoseAGuyIn10Days has nearly 50k posts, as of June 2025

Despite releasing back in 2003, over a decade before TikTok launched, the film has garnered attention on the platform as the lead part wore a stand-out yellow dress in the film. This depicts that even years on from an event, TikTok can cause a resurgence in trends, with butter yellow since having a real moment within fashion. It also underscores the notion of 'anemoia', with the youth feeling nostalgic about an event whereby many of them weren't yet born, signaling a somewhat dissatisfaction with the present day.

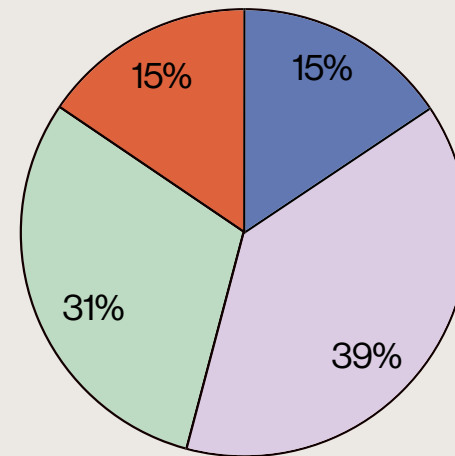
There's some extreme engagement when it comes to fashion trends, with 21% talking to friends regularly about trends and 15% following trend reports, blogs or fashion pages to stay ahead

Which celebrities or public figures influenced your style in the past year?



- A lot - we talk about trends and try them out together
- Somewhat - sometimes they'll bring up a trend I hadn't seen
- Not much - I usually find trends on my own
- Not at all - I don't really follow trends or talk about them with friends

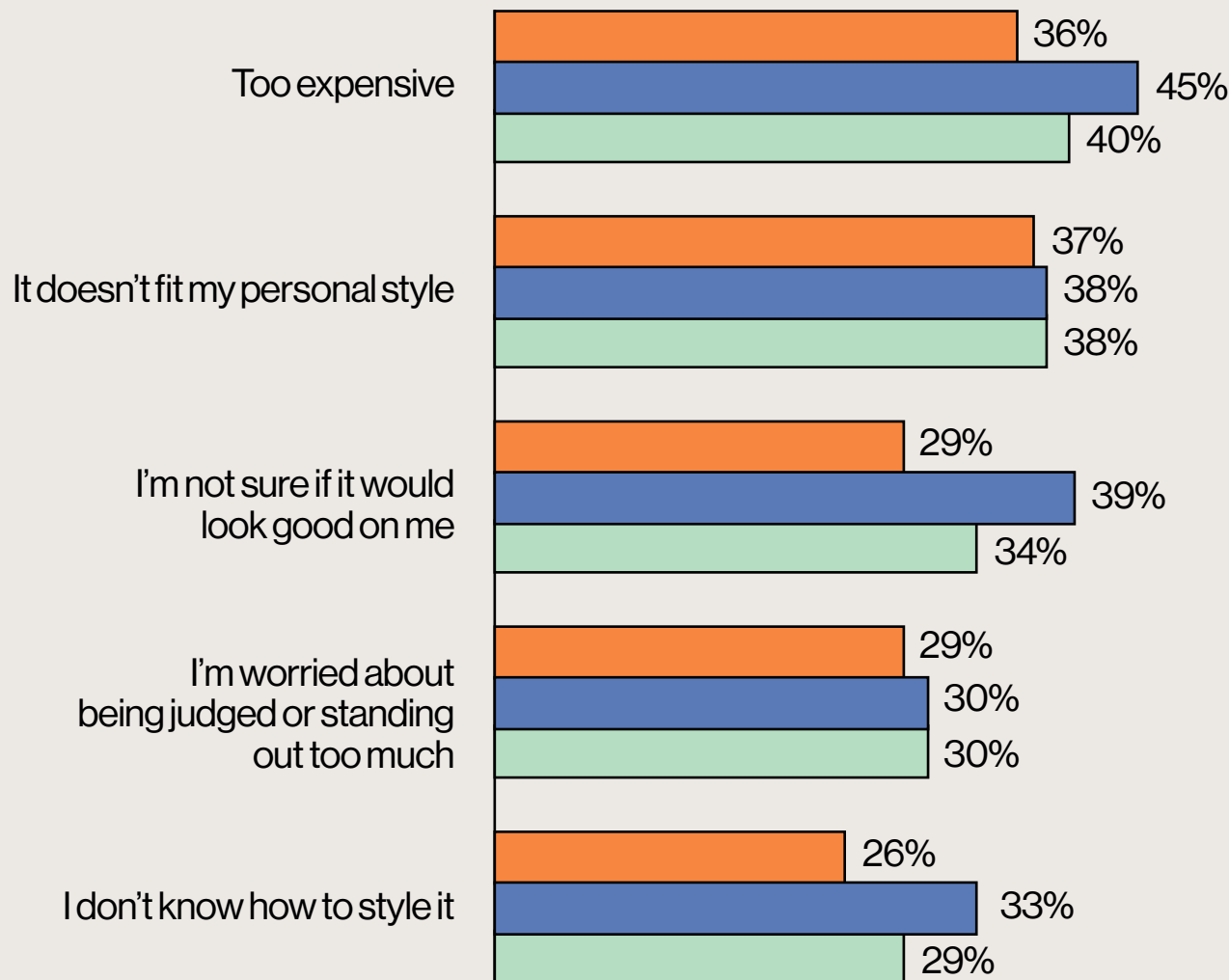
Which of these best describes how you usually find out about fashion trends?



- I actively follow trend reports, blogs, or fashion pages to stay ahead
- I check social media or search when I want to see what's trending
- I don't really go looking - I just pick up trends / what is showing in my feed
- I don't really follow trends at all

Expense is a deterrent when it comes to trying new fashion trends

What usually holds you back from trying a new fashion trend or switching up your personal style?



Females are more deterred by expense when it comes to trialling new trends

Females are more likely to be deterred from trying new fashion trends due to expense compared with males. Whereas males were slightly more likely to state that they don't really care about trends in general.

Male Female Total

Gen Alpha are more motivated by trendiness and staying up-to-date

Discovery

Trendiness and staying up-to-date with fashion: What makes you feel drawn to or interested in a fashion or lifestyle brand?

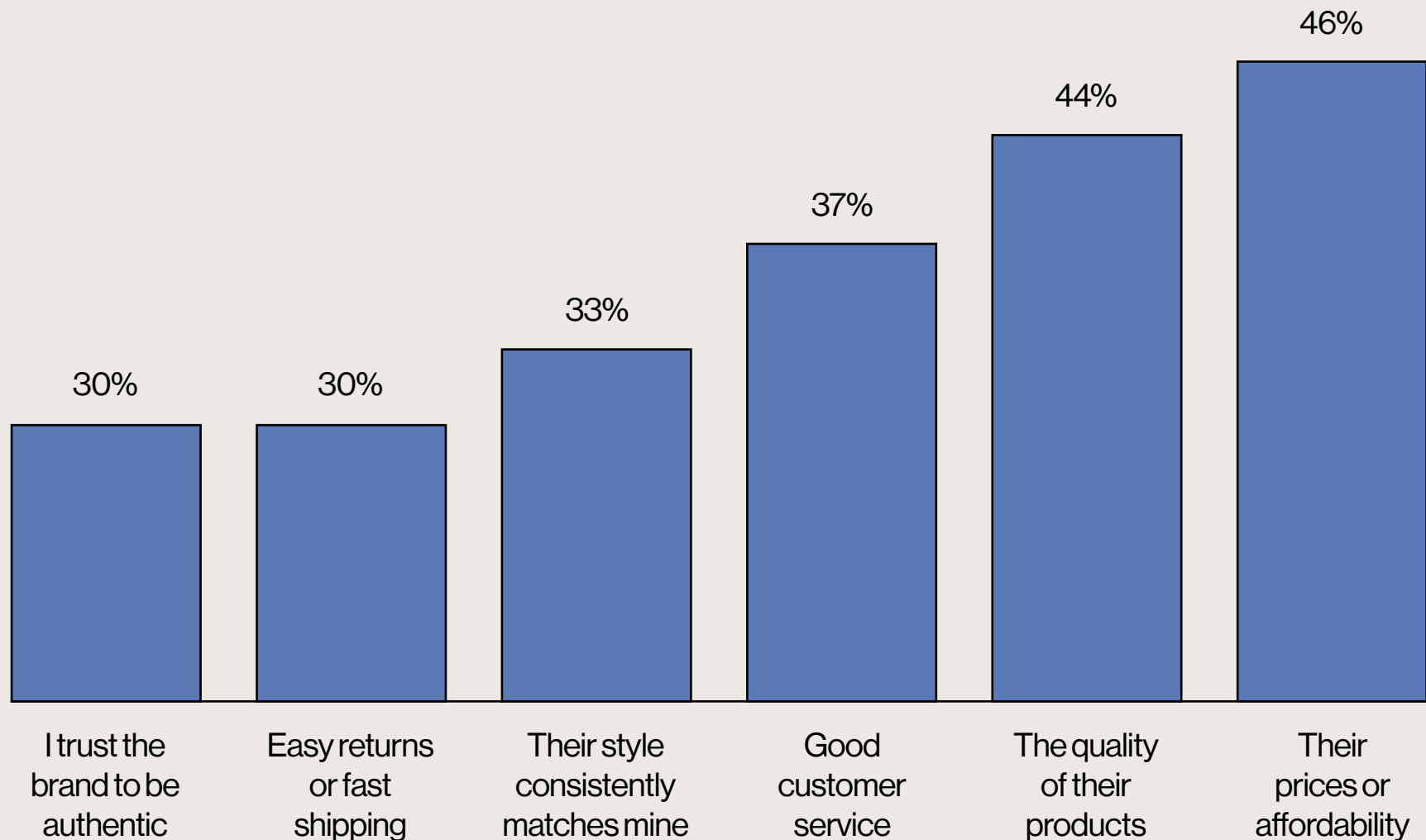
	Total	Gen Alpha	Gen Z
1. Not At All Important	21%	8%	22%
2. Slightly Important	22%	15%	22%
3. Moderately Important	31%	26%	31%
4. Very Important	16%	30%	16%
5. Extremely Important	10%	21%	10%

Staying current motivates interest in fashion and lifestyle brands among Gen Alpha

Over half of Gen Alpha respondents state that trendiness and staying up-to-date within fashion is either a very important or extremely important factor which draw them to fashion/lifestyle brands. This aligns with the fact that this demographic have grown up in a social-media dominated world, where staying on-trend is deemed essential.

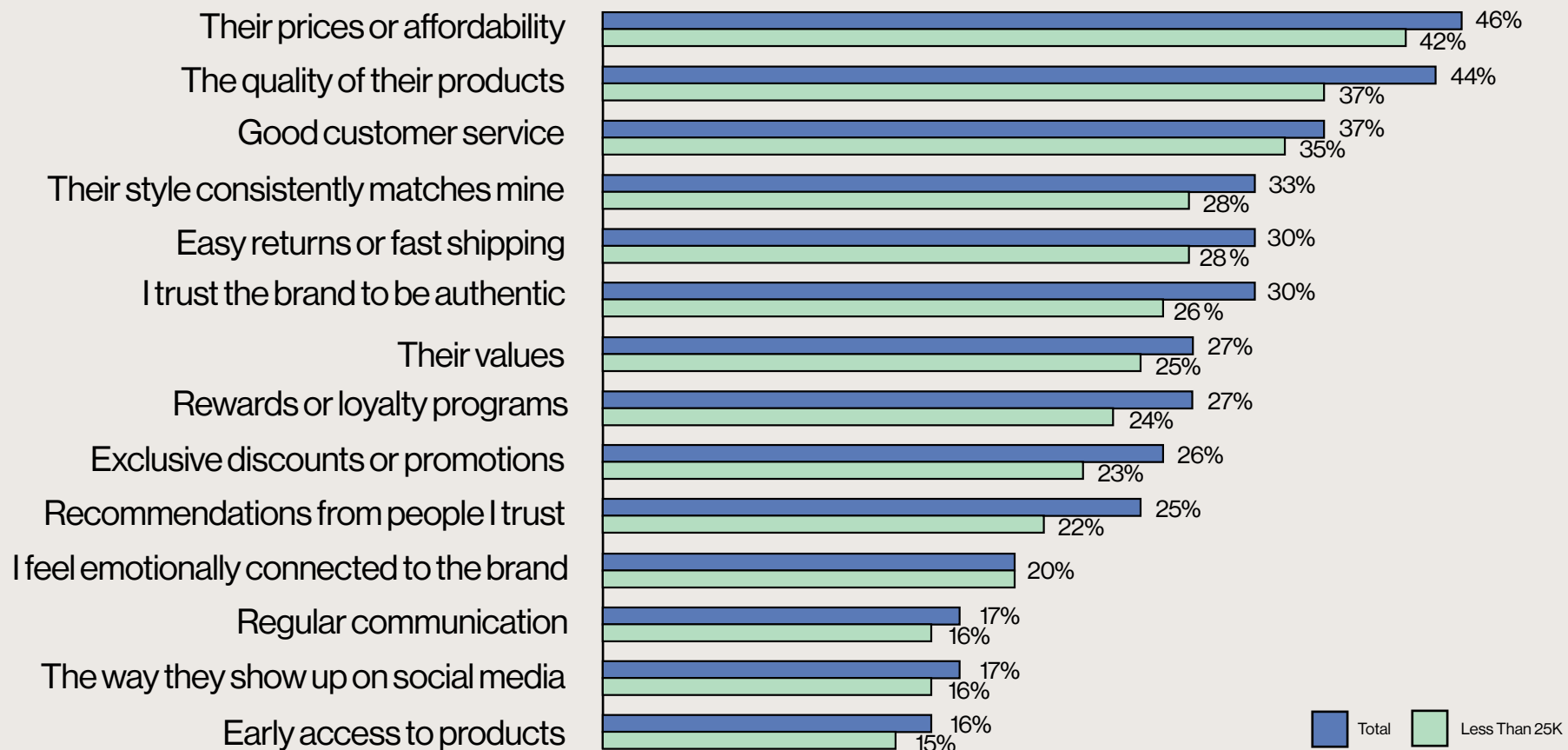
Price and quality are key to driving loyalty in fashion

What makes you want to stick with a fashion or lifestyle brand over time?



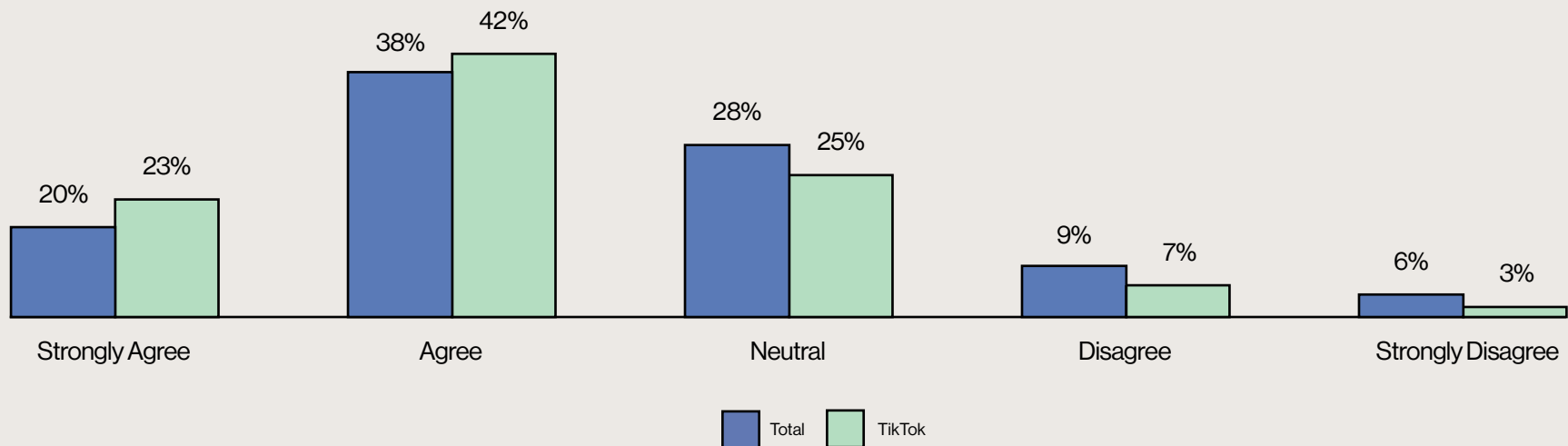
Respondents from lower income households under index when considering factors which motivate loyalty to fashion and lifestyle brands

What makes you want to stick with a fashion or lifestyle brand over time?



Those who rely on TikTok to keep up with fashion trends are more likely to agree that social media encourages them to buy brands they otherwise wouldn't have known about

Social media has allowed me to discover brands that I otherwise would not have known about, and which social media platform(s) do you rely on to stay in the know on current fashion trends?

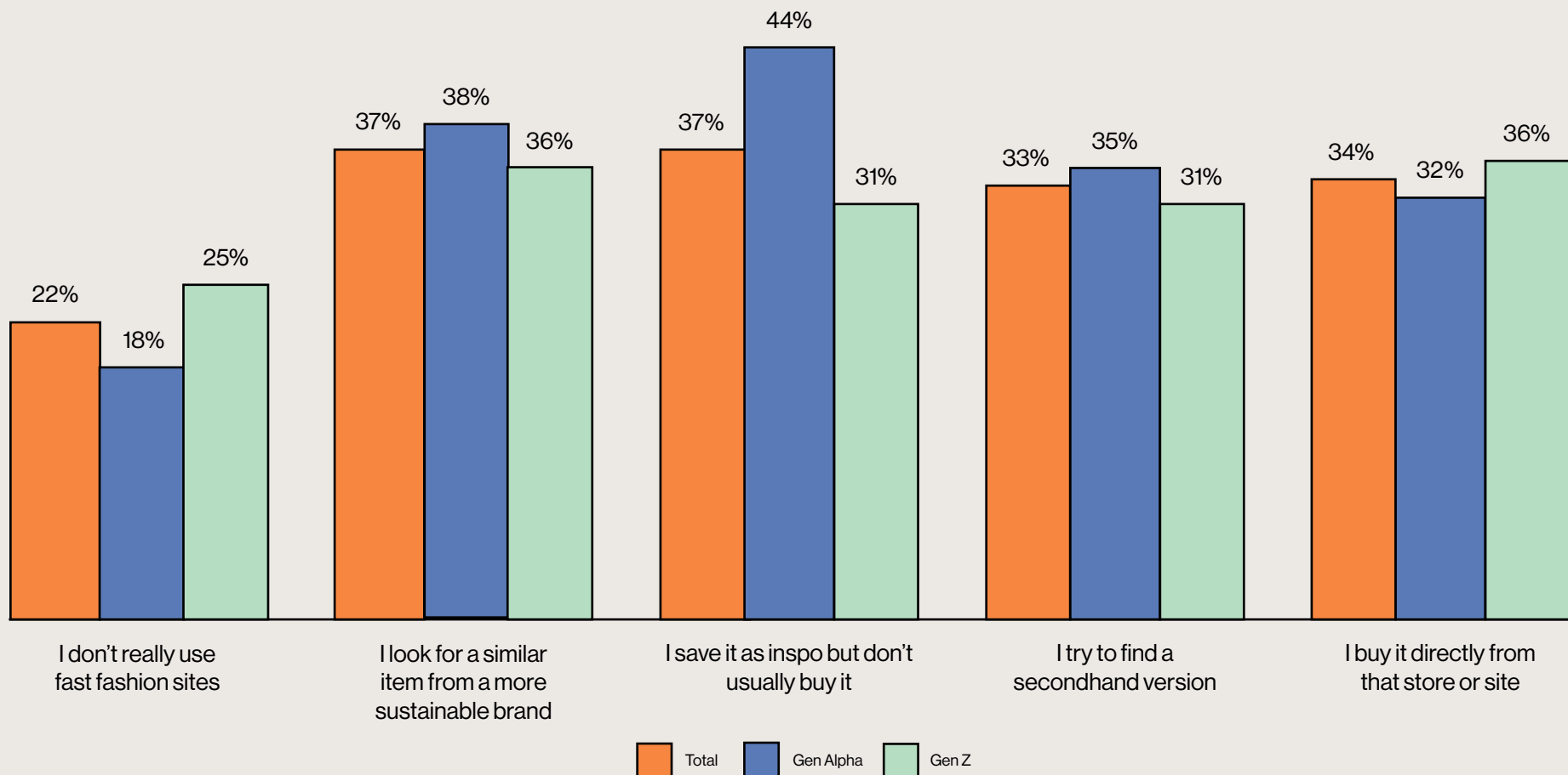


TikTok shop spotlights less-known brands

Not only do TikTok users learn about brands via the platform due to the prevalence of content such as 'Hauls', 'Unboxing' and 'Get Ready With Me' Videos, but TikTok shop helps to spotlight new brands. The channel also often has steep discounts, lowering the barrier to entry for prospect buyers.

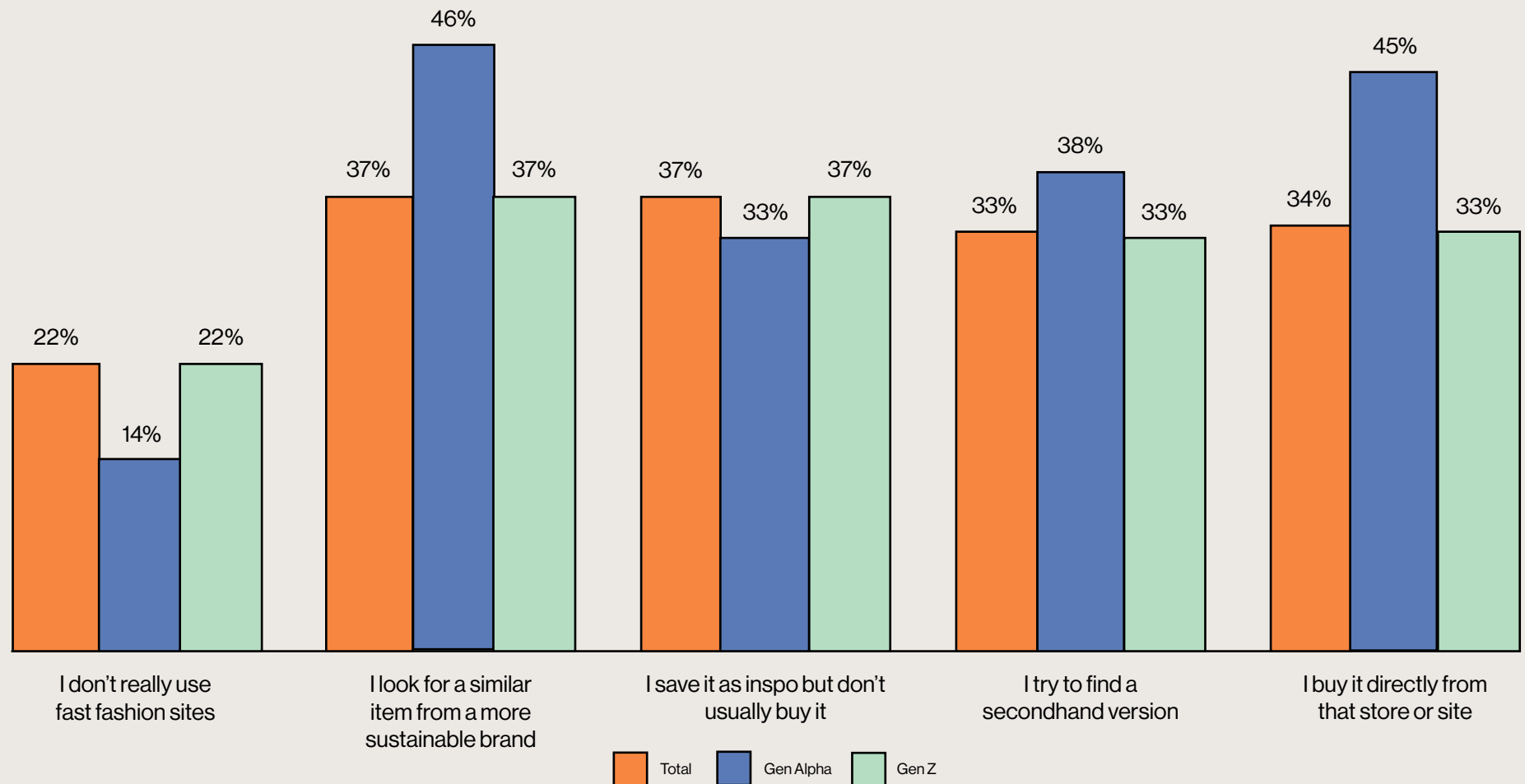
Females will seek alternatives to fast-fashion products, whilst males are more likely to avoid these sites altogether

What do you usually do when you see a trend you like from a fast fashion brand?



Gen Alpha will seek alternatives to fast-fashion products, whilst Gen Z are more likely to avoid these sites altogether

What do you usually do when you see a trend you like from a fast fashion brand?



Social commerce somewhat encourages fast fashion spend

What do you usually do when you see a trend you like from a fast fashion brand?
And in the past 12 months, which of the following have you done?

	Total	Not in the past 12 months	I've made a purchase through live-stream shopping (e.g., TikTok Live, Amazon Live)	I've made a purchase through social commerce (E.g., TikTok Shop, IG Shop)	I've watched a live-stream shopping video but didn't buy anything
I don't really use fast fashion sites	22%	39%	13%	13%	14%
I look for a similar item from a more sustainable brand	37%	25%	47%	45%	44%
I save it as inspo but don't usually buy it	37%	33%	39%	41%	41%
I try to find a secondhand version	33%	22%	43%	39%	40%
I buy it directly from that store or site	34%	20%	42%	43%	41%

Social commerce shoppers aren't as phased about shopping on fast fashion sites

Those who shop via social commerce platforms or through live-stream shopping are more likely to say they would shop direct from a fast fashion site if they spotted a trend they like, compared with respondents on average. This points to the fact that social commerce shoppers are largely more trend-led, and therefore the only accessible way of keeping up with such trends is through shopping fast fashion sites. Building on this, it also reflects the fast-fashion nature of platforms such as TikTok shop, with those who don't shop via the platform more likely to take measures to avoid fast fashion sites for eco reasons.

Nike is a firm favorite when it comes to fashion


What is your favorite fashion brand?

 18%

GUCCI 5%

 4%

FASHION NOVA 3% ZARA 2%  lululemon 2%

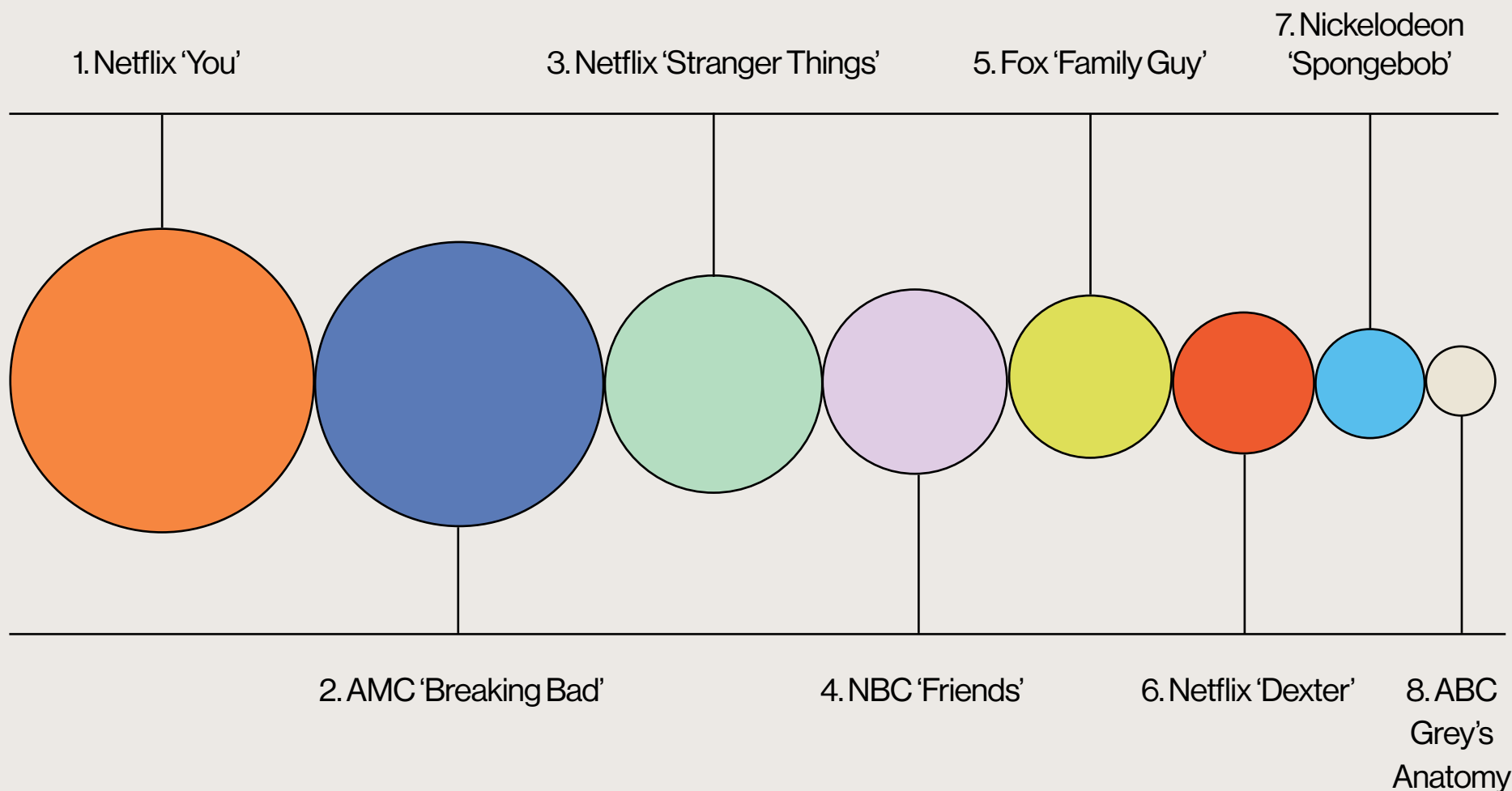
 2% Dior 1% P A C S U N 1%

The variety of shows mentioned reflects the broad life stages of the youth

Discovery

What are your 3 favorite TV shows that you've watched in the past year?

Note: the larger the circle the more frequently the TV show was mentioned as a favorite.



Social Media



—▶ Insights into social media trends among the youth

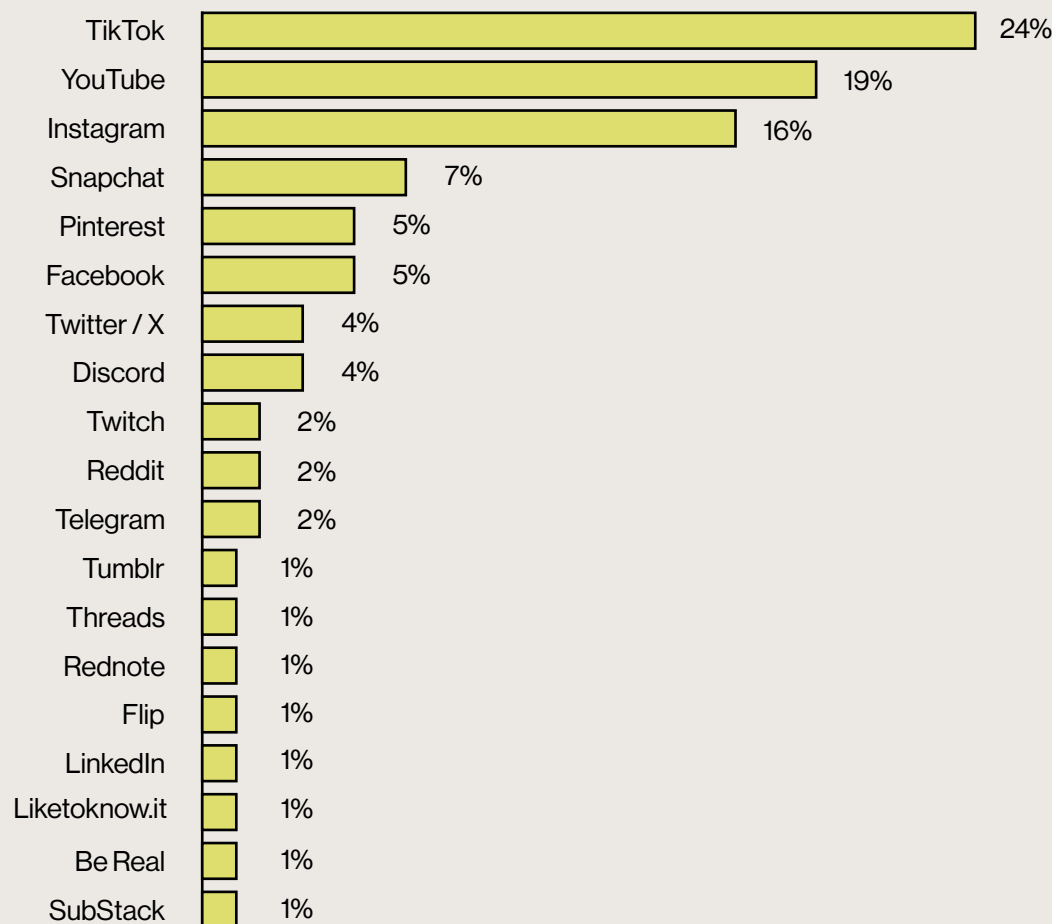


Social Media



A TikTok ban would be hard-hitting for social media users

What is the one social media platform that you couldn't live without?

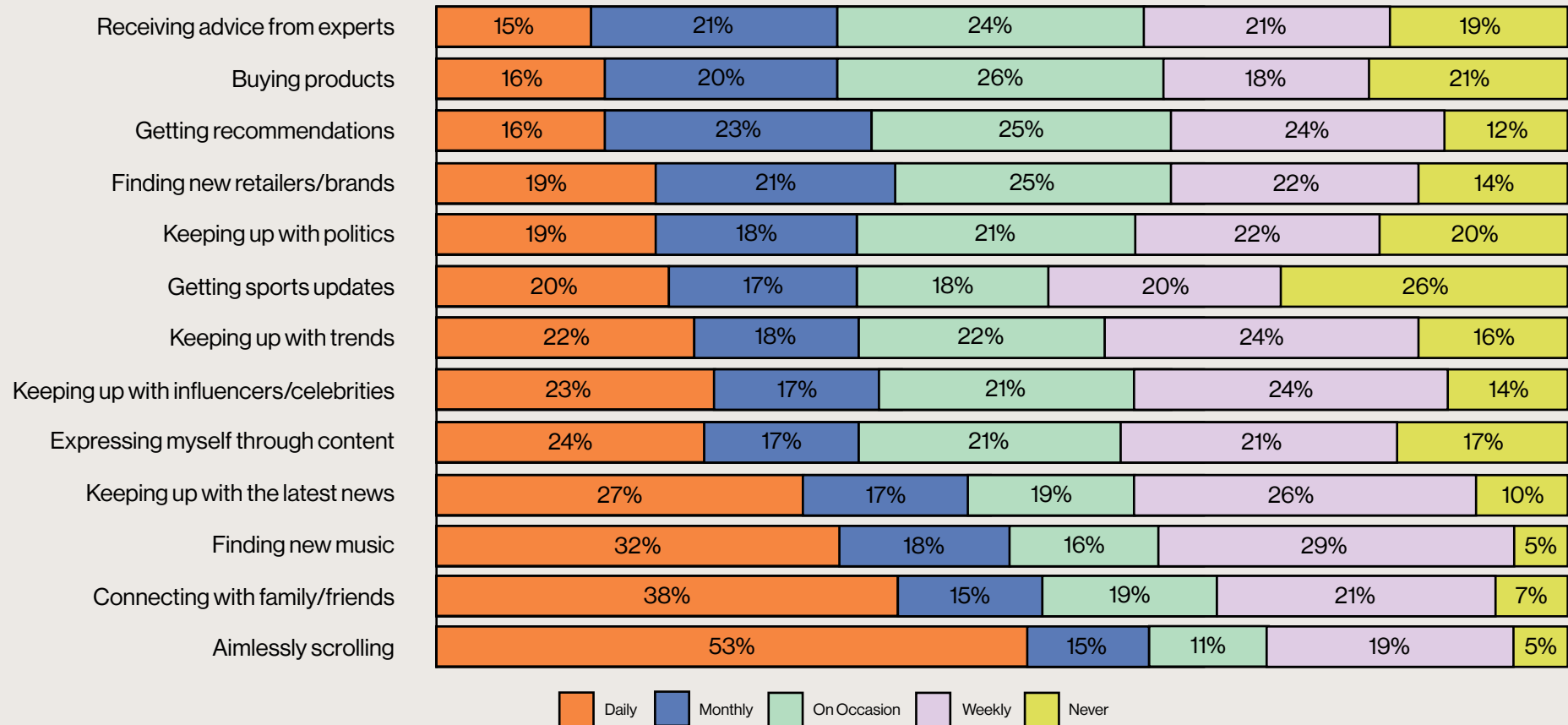


If TikTok were unavailable, 47% of those who couldn't live without it said Instagram would be their main go to instead

Whilst nearly half would revert to Instagram if TikTok became unavailable, the ban would be a great loss for users, with nearly a quarter stating they couldn't live without TikTok. TikTok is renowned for its more authentic lens, with influencers and celebrities often offering a less filtered view into their lives on TikTok, compared with Instagram, which is comparatively more image-led and therefore often more curated. Additionally, more respondents stated TikTok as a source they would use if they needed to look something up (e.g. a fact or how-to), compared with Instagram, another element of the platform which would be missed if a ban were to be enforced.

Over half aimlessly scroll daily, yet the main cause of negative sentiment when on social media is the feeling of wasting time

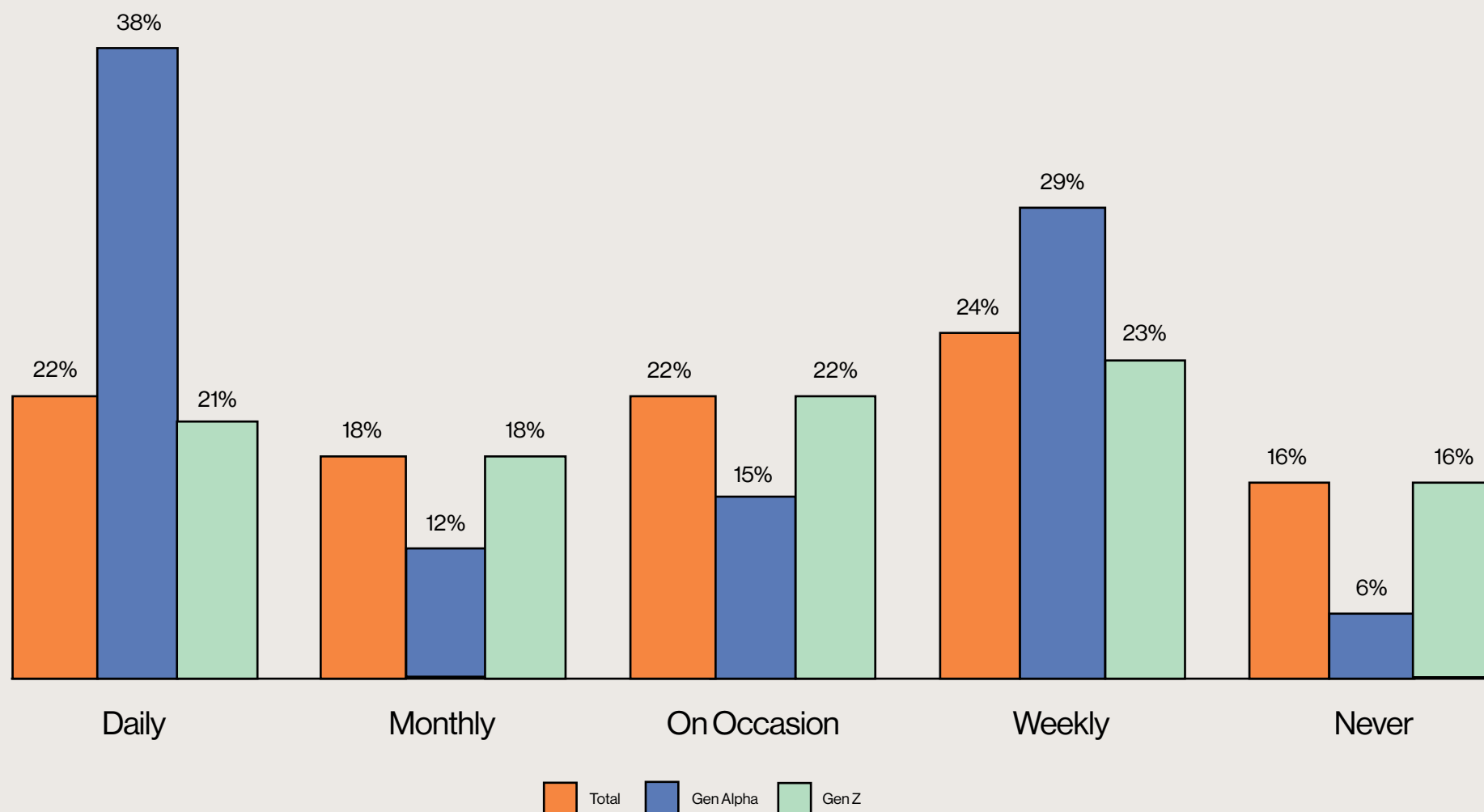
How much do you use social media for the following activities?



Over 1/3 of Gen Alpha respondents use social media daily to keep up with trends

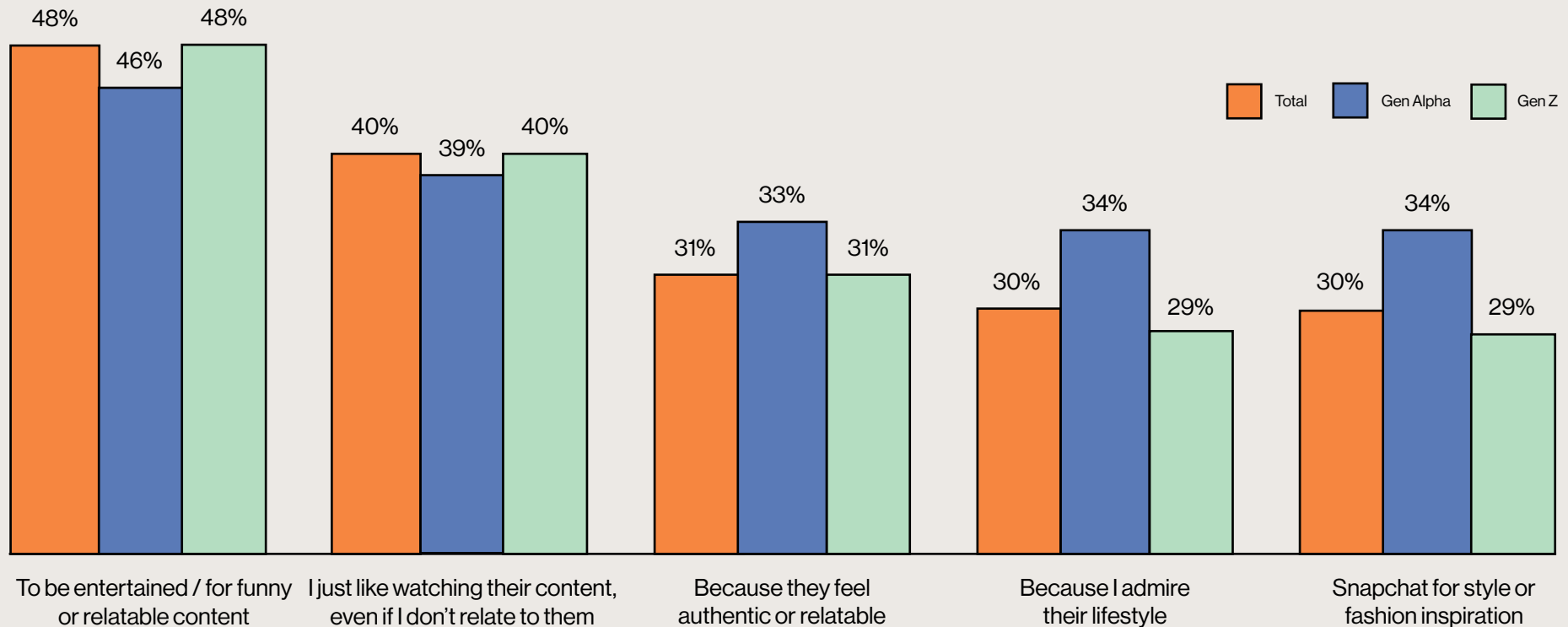
Keeping up with trends (e.g., fashion, beauty):

How much do you use social media for the following activities?



Motivation for following influencers or celebrities differs among Gen Z and Gen Alpha

Why do you follow influencers or celebrities on social media?



Gen Alpha look up to celebrities and influencers more than Gen Z

Following influencers is more about entertainment for Gen Z but driven more by admiration, relatability and inspiration for Gen Alpha. Whilst this will be driven in-part by age, and the fact that Gen Z have been exposed to the traditional influencer for a longer period based on their age, whilst for Gen Alpha the novelty of such lifestyles appears admirable, it also paints a picture as to how the future influencer needs to portray themselves online to maintain a younger audience.

Females are more diverse in the types of social media influencers they follow than males

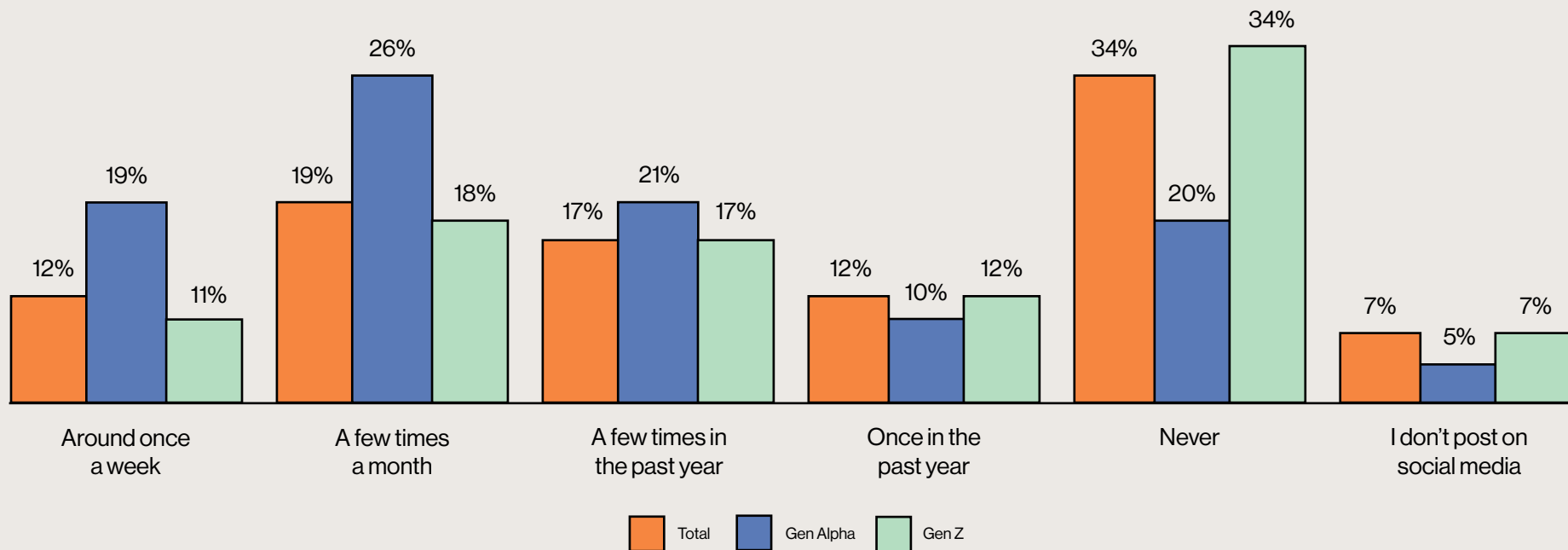


Which types, if any, of social media influencers do you engage with?

	Total	Female	Male
Lifestyle	38%	43%	34%
Fashion	37%	44%	31%
Other celebrities	33%	34%	32%
Beauty	31%	46%	17%
Skincare	30%	41%	21%
Fitness	30%	28%	32%
Travel	29%	31%	29%
Wellness	25%	27%	24%
Reality TV stars	23%	25%	20%

3/4 of Gen Alpha have purchased clothes specifically to post on social media in the past year

How often have you bought clothes specifically to create social media content / to post online?



Content creator ambitions drive spend activity in clothing

The youth are motivated when it comes to creating an online personality, with 12% buying new clothes around once a week specifically to create content with. This is driven by ambitions around making it as a social media influencer, with such spend perceived as a worthwhile investment if users can achieve this longer-term goal.

Fashion-first content creators are less motivated to follow influencers to be entertained, but more for inspiration and to keep up with trends

How often have you bought clothes specifically to create social media content to post online, and why do you follow influencers or celebrities on social media?

	Total	Around once p/week	Few times p/year	Few times p/month	Once in the past year	Never	I don't post on social media
To be entertained / for funny or relatable content	48%	36%	45%	43%	46%	60%	26%
I just like watching their content, even if I don't relate to them	40%	32%	38%	35%	39%	48%	25%
Because they feel authentic or relatable	31%	32%	33%	31%	34%	31%	16%
Because I admire their lifestyle	30%	33%	33%	34%	33%	26%	16%
For style or fashion inspiration	30%	39%	35%	35%	32%	23%	15%
Because they talk about issues I care about	28%	31%	29%	32%	28%	27%	16%
To stay in the know about trends or pop culture	27%	37%	29%	33%	29%	19%	19%
For beauty or skincare tips	25%	33%	27%	29%	28%	20%	18%
To discover new products or brands	25%	30%	31%	30%	28%	18%	14%
I don't follow influencers or celebrities	8%	3%	3%	2%	3%	12%	35%

TikTok and Instagram encourages brand discovery

Agreement with social media has allowed me to discover brands that I otherwise would not have known about

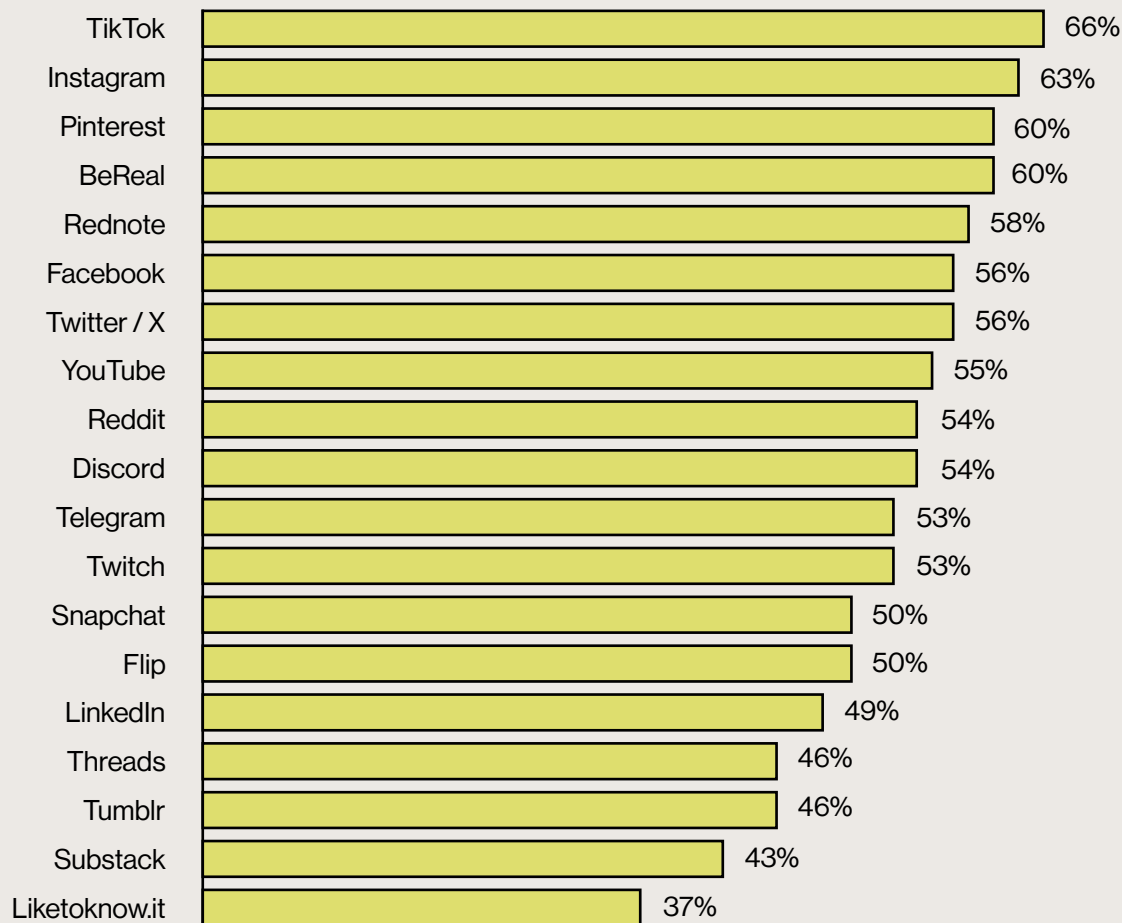
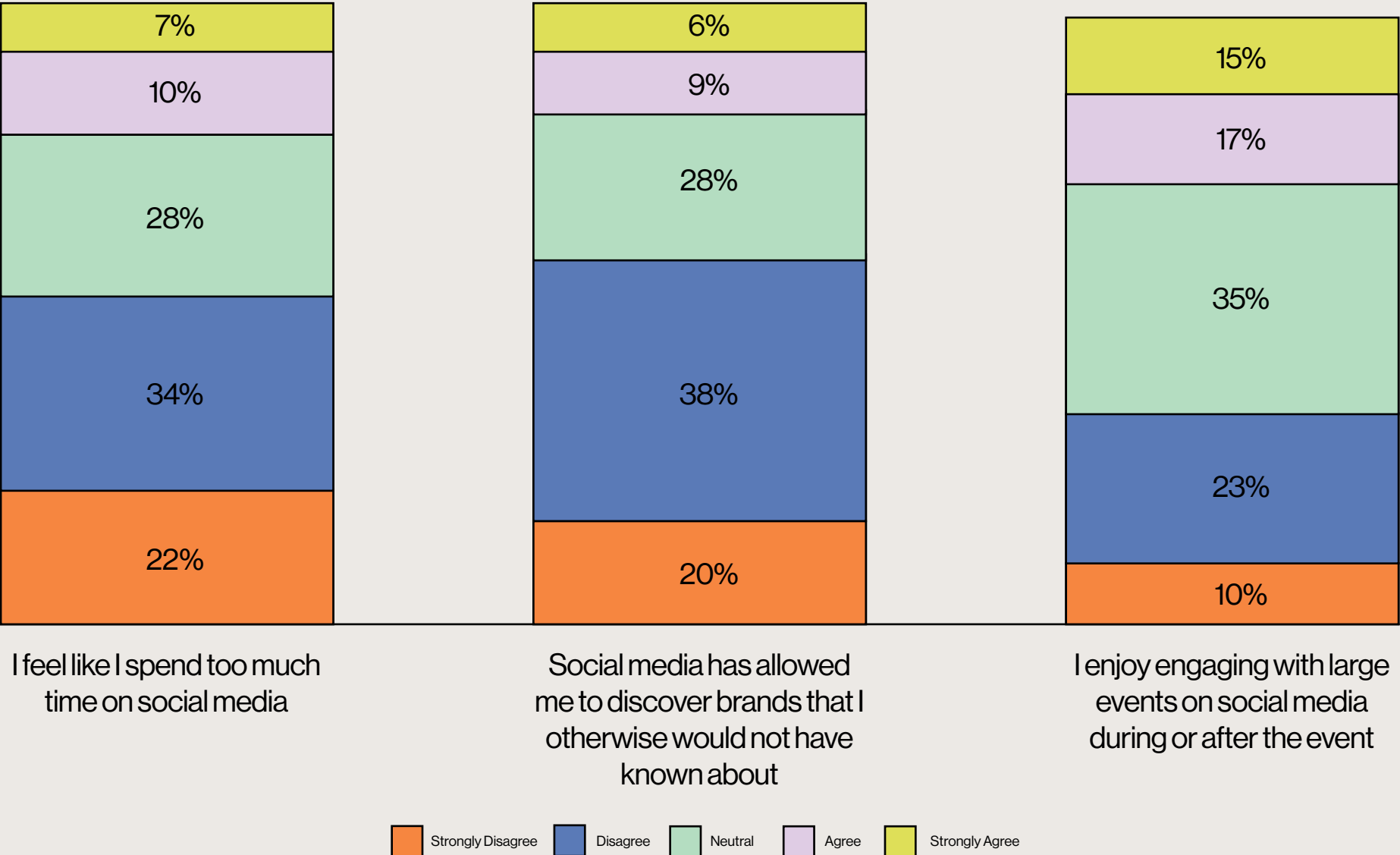


Image and video-led apps facilitate brand discovery

Those who claim they couldn't live without TikTok, Instagram or Pinterest are more likely to agree social media allows them to discover brands they otherwise would not have known about, compared with the average respondent.

Over half of the youth feel they spend too much time on social media



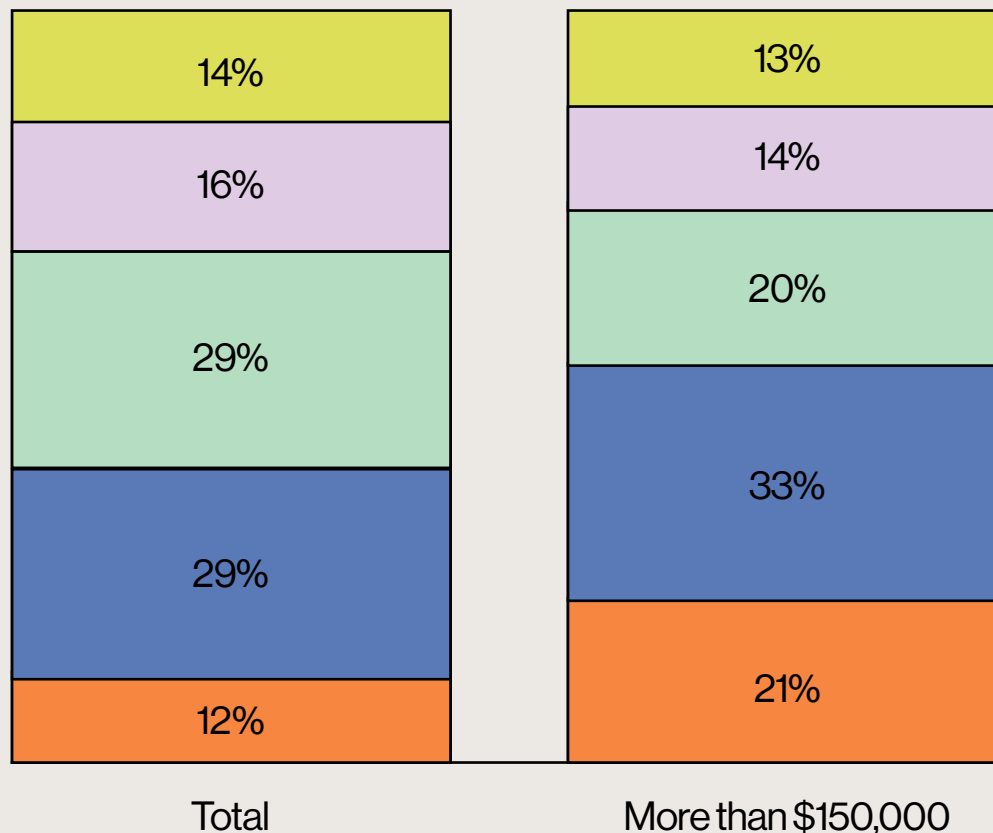
When social media makes you feel bad,
what's the biggest reason why?

“In all honesty, it has ruined relationships,
friendships, the true meaning of love and respect.
Granted we get to connect virtually, but we're so
disconnected physically it's impossible to come
back from that especially with the new
generations.”

Political people make my existence undervalued so other people can feel better | Others using
social media to put people down | I feel like I'm wasting time with my life | Feel like I'm trying to distract myself
from something bigger | Everyone wants to make you feel bad | When I use social media I feel like I'm bragging
to everyone and I don't enjoy it | I could be doing something more important | People online do
nothing but argue | People are mean | Seeing bad people thriving on
social media mostly | Negative stories lead to negative thoughts | There's bullies online

Respondents from a higher income household are more likely to be tempted to buy products based on what they see on social media

'Social media makes me buy more than I would otherwise'



Less risk leads to greater spend activity on social media

Those from a higher income home are more likely to be swayed into buying products from social media. The return policy on platforms such as TikTok is often unclear, meaning that shopping via these outlets can be a risk, with lower income respondents less willing to take that risk despite temptation.

Strongly Disagree Disagree Neutral Agree Strongly Agree

Finances



—▶ Insights into financial trends among the youth



Finances



Over a third of the youth claim to be financially independent. Financial independence is only slightly more common among Gen Z, with just 32% of Gen Alpha claiming to be financially independent (vs. 35% of Gen Z).

35%

Of the youth claim to be financially independent

24%

Of the youth claim they are not financially independent and completely rely on their parents/guardians

41%

Of the youth claim they are partially financially independent and partially rely on their parents/guardians

Financial Independence Among Demographics



A higher percentage of respondents identifying as Black/African American report financial independence, with 42% claiming to be financially self-sufficient. In comparison, only 21% of Asian respondents and 32% of White/Caucasian respondents reported the same level of financial independence.

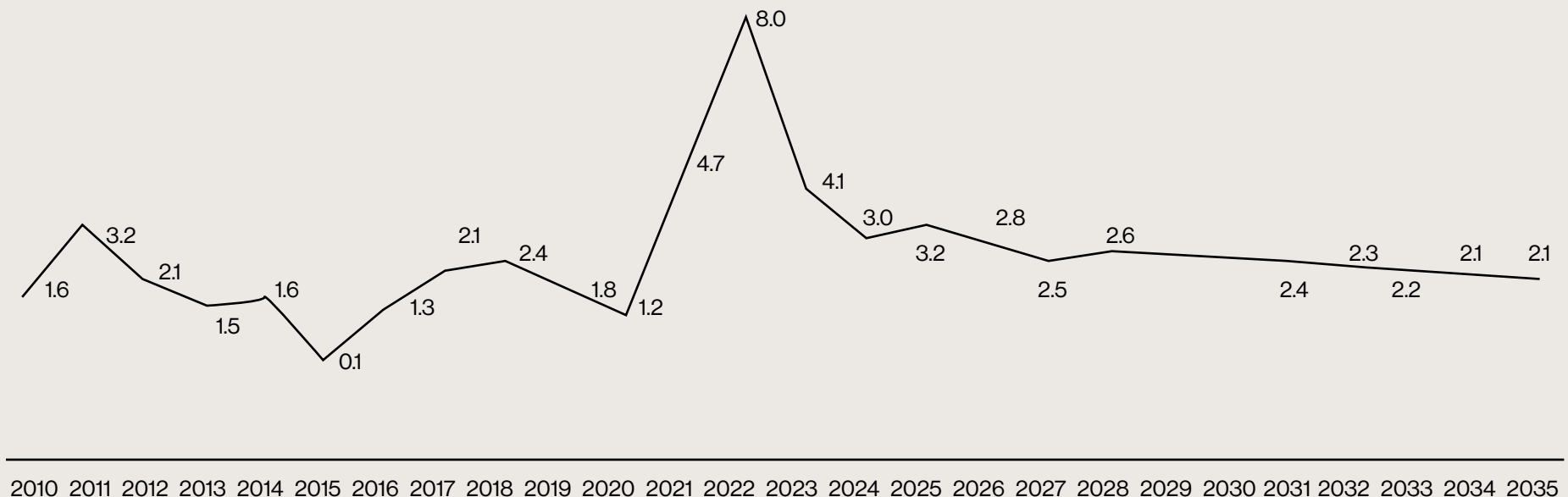
Definitions of financial independence are relative

Of those who still live in a family-owned home, one in five claim to be financially independent. Whilst the youth could contribute to more functional spend (i.e., bills), it's less likely they are paying rent and/or a mortgage. Therefore, it's worth being cautious when interpreting this data.

CPI continues to ease in 2025

Lowering CPI will improve financial sentiment among the youth, particularly the 35% who claim to be financially independent. Whilst this could encourage more frivolous spending, it might also lead young people to prioritize saving, something they're willing to maintain even with less money to spend.

CPI in the US, 2010-35 (fore)

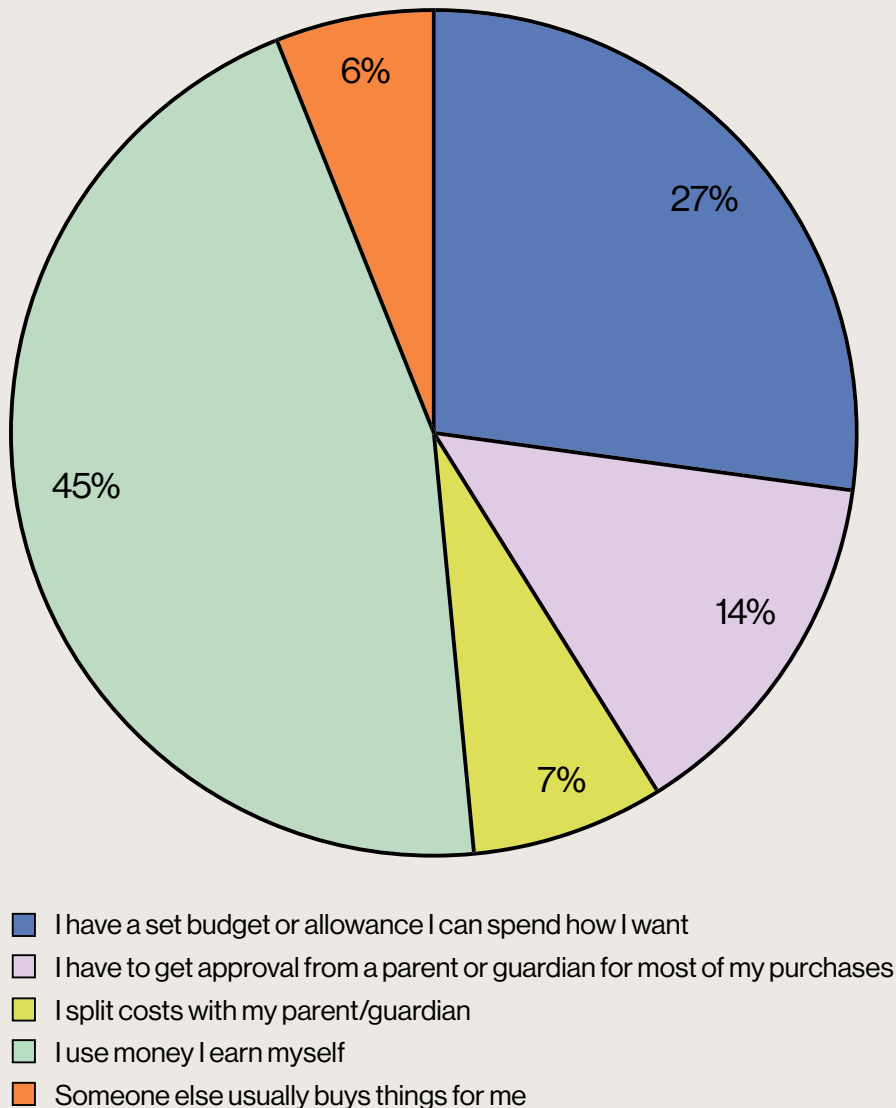


The Consumer Price Index (CPI) is a measure of the average change over time in the prices paid by urban consumers for a market basket of consumer goods and services. Indexes are available for the U.S. and various geographic areas (Bureau of Labor Statistics)

Nearly half of the youth are self-sufficient

Finances

Which of the following best describes how you usually pay for things you buy?

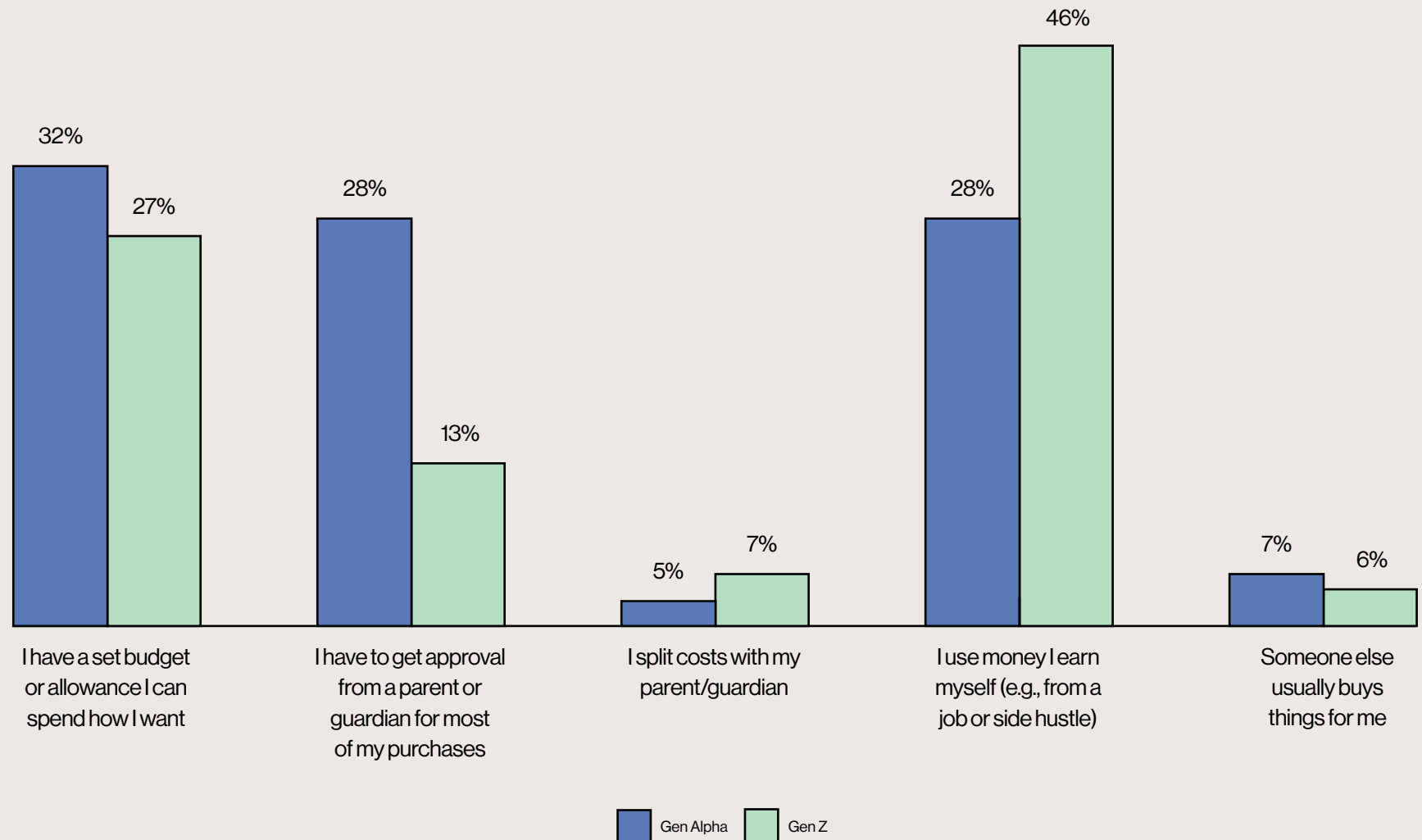


Payment Methods Among Youth

A notable 45% of respondents use money they earn themselves, indicating a strong sense of financial independence among this demographic. Additionally, a further 27% report having a set budget or allowance that they can spend at their discretion, suggesting that many are developing essential financial planning skills. Conversely, a smaller portion (14%) indicated that they need to get approval from a parent or guardian for most purchases, highlighting the ongoing influence of parental guidance in their financial decisions. These findings underscore the varying levels of financial autonomy among the youth, reflective of significant changes in life stage between the ages of 11 and 24.

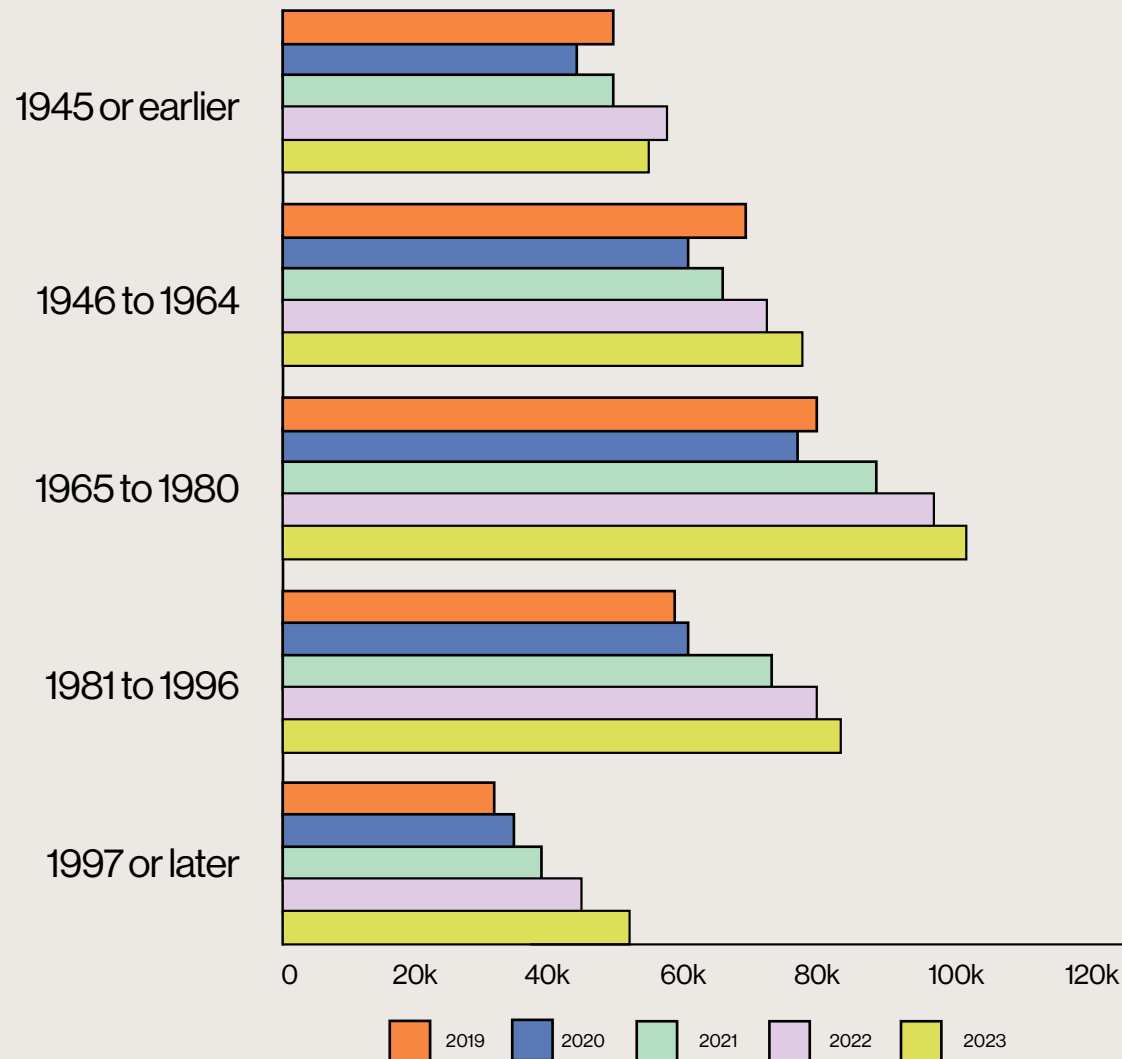
Gen Z are much more likely to use self-earned money

Which of the following best describes how you usually pay for things you buy?



The spend impact of younger consumers becomes increasingly relevant

Total average annual expenditure (\$) by generation of birth

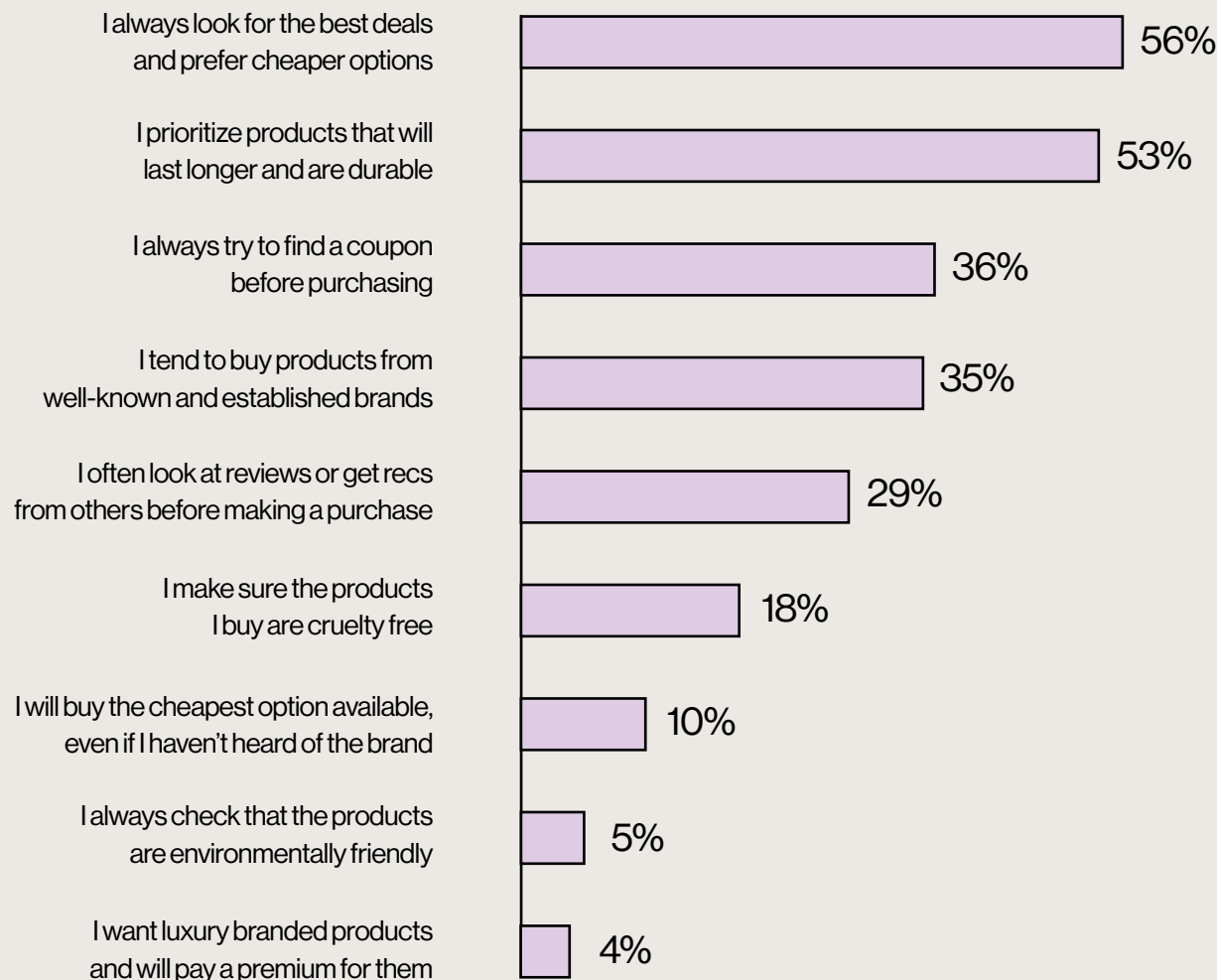


The spend relevance of the youth is increasing

Over time, the spend relevance of the youth has grown. Whilst this will in-part be due to inflation, it also suggests that the youth are increasingly spending themselves, without relying on their parents. This has been driven by a combination of side hustles and rising college fees which are encouraging some to enter the workforce earlier, meaning more of the youth are now earning and able to spend a greater amount independently. This narrative means it's increasingly important that brands and retailers design for a younger demographic within advertising.

Cost and durability motivate spend decisions

When making purchases, what factors most motivate your decision on what to buy?



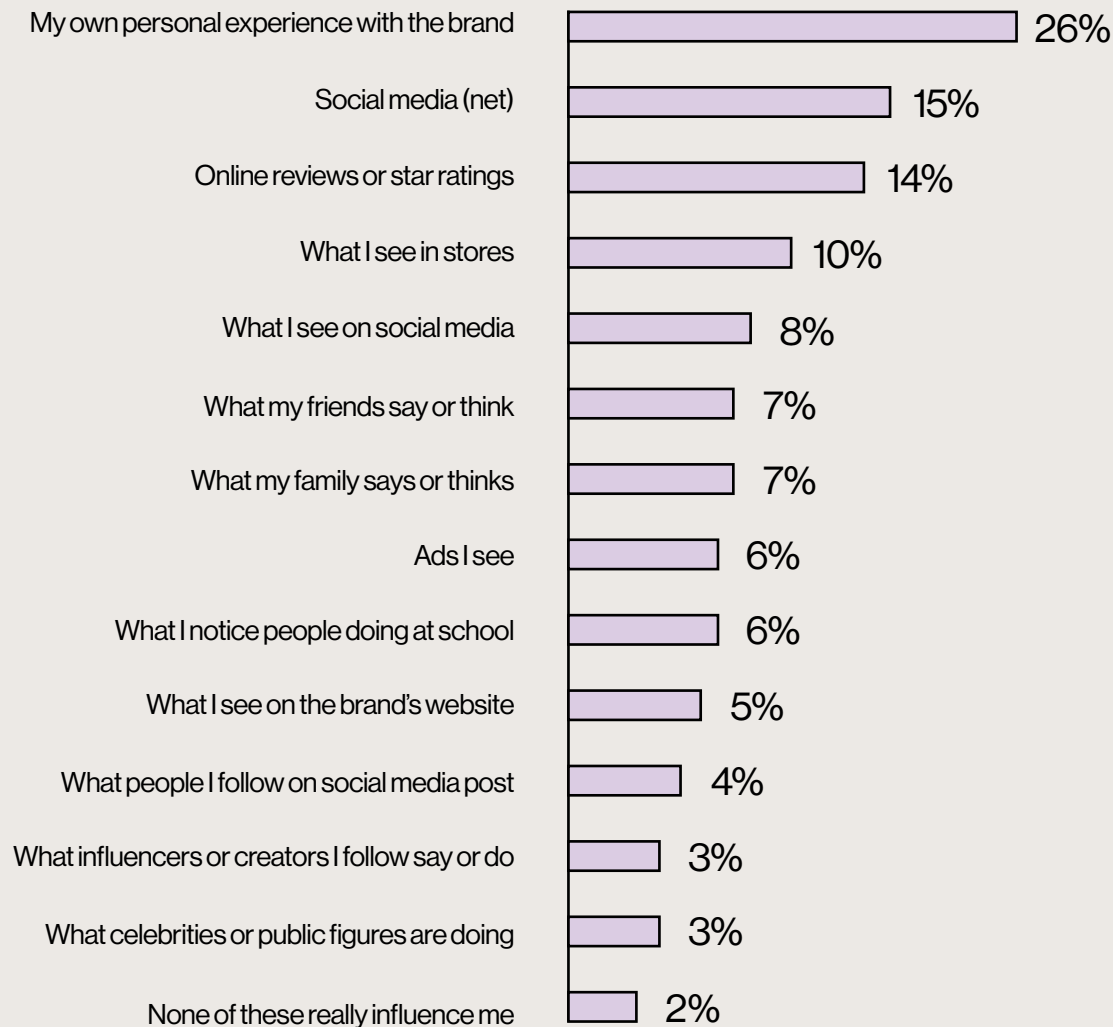
Value takes precedence over environmental considerations.

Cost-effectiveness is important to the youth, with 56% prioritizing the best deals and 53% favoring durable products, indicating a strong inclination towards value for money and longevity spend. Additionally, the pursuit of discounts is significant, as 36% actively seek out coupons before buying, showcasing a savvy consumer mindset. However, environmental considerations appear to hold less weight, with only 5% emphasizing the importance of eco-friendly products, suggesting that while price and durability dominate their decision-making, sustainability is not yet a primary concern for this demographic.

First impressions by brands matter

Finances

And which of these is the most influential when you're forming an opinion about a retail brand?

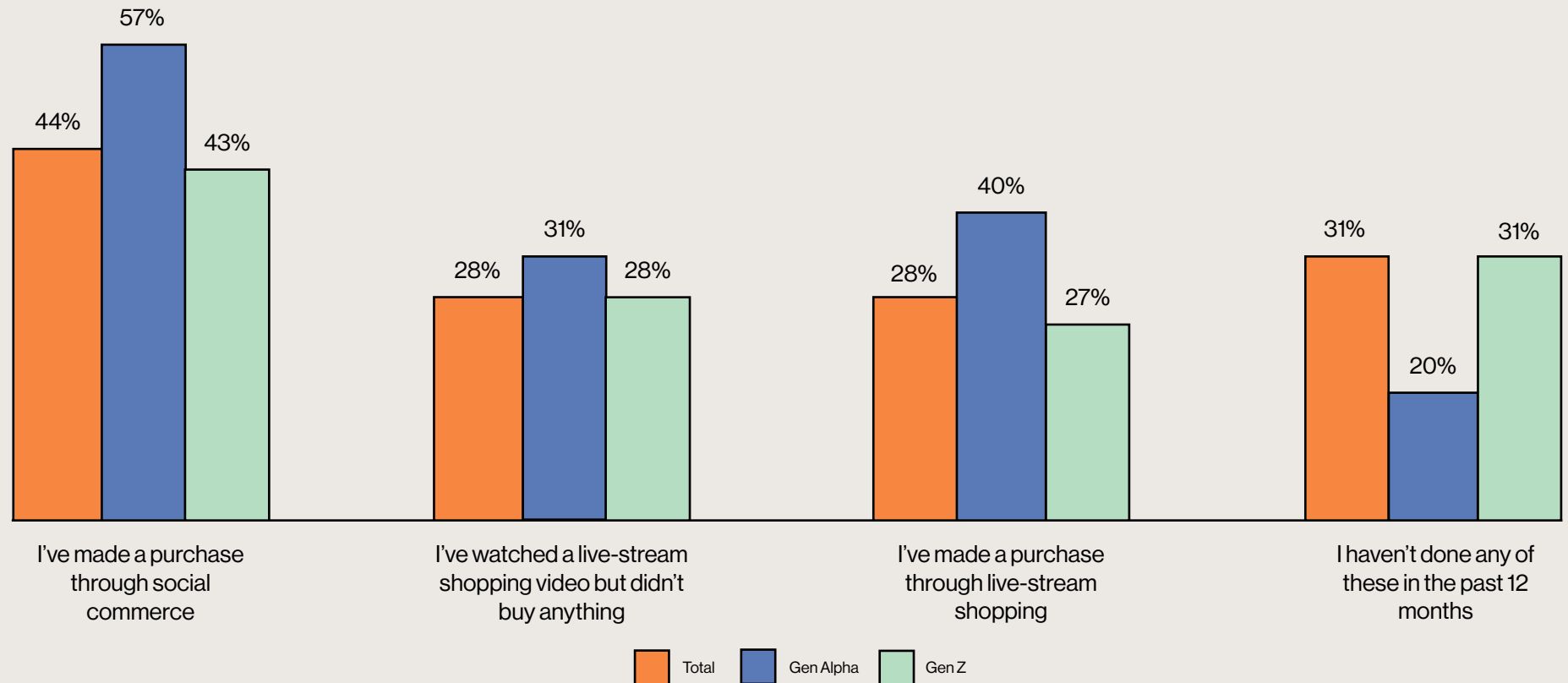


Personal experiences outweigh celebrity influence in shaping retail opinions

The youth demonstrate a clear preference for personal experiences over celebrity endorsements when forming opinions about brands, with this signaling the relevance of hyper personalization. A striking 26% of this demographic cite their own interactions with a brand as the most influential factor, overshadowing online reviews at 14% and in-store observations at 10%. Notably, celebrity involvement holds minimal sway, with only 3% considering it significant. This trend highlights the importance of authentic brand engagement and customer satisfaction in capturing the loyalty of younger consumers, who prioritize genuine experiences over external influences.

Gen Alpha buy into social commerce

In the past 12 months, which of the following have you done?

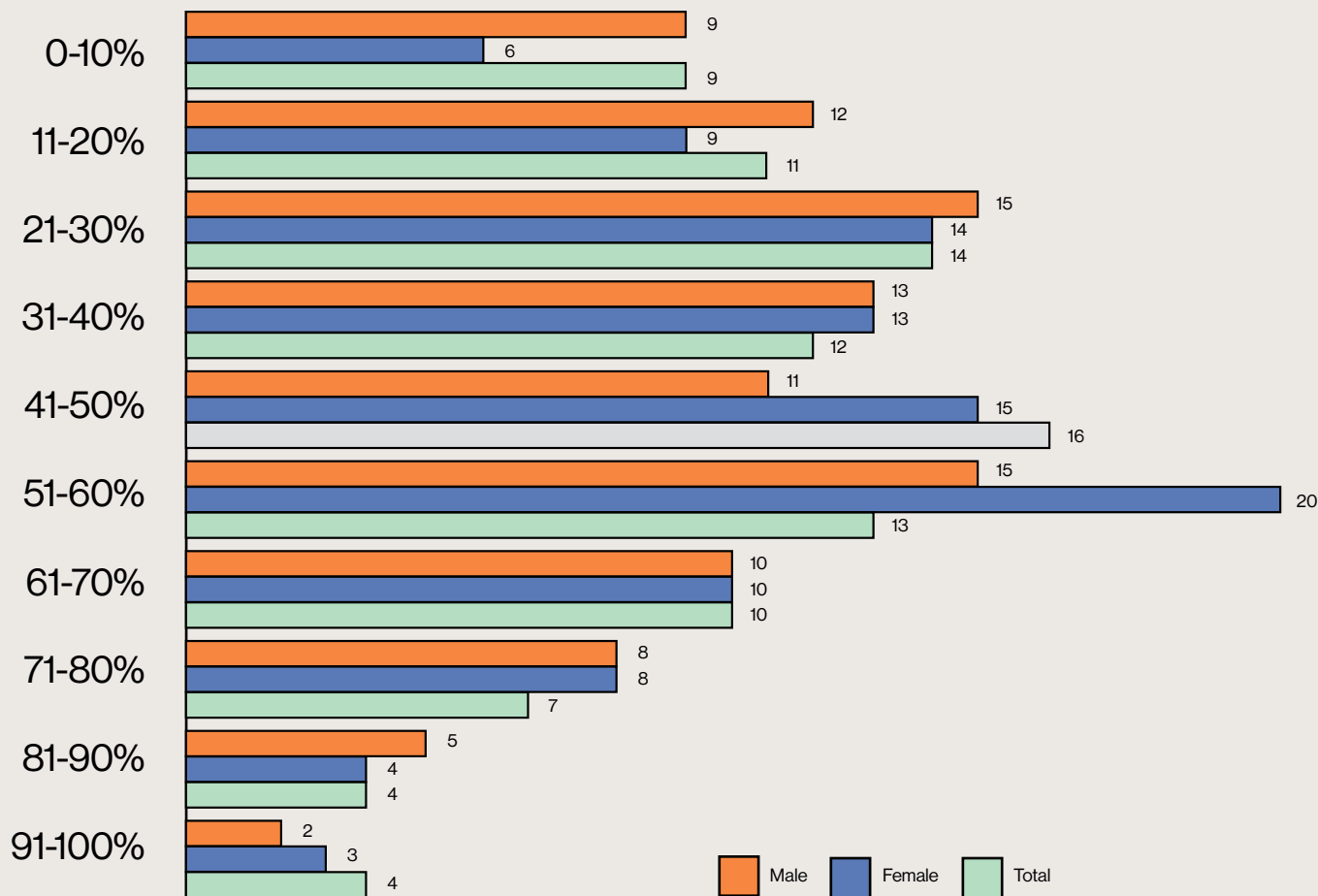


Gen Alpha's engagement with social commerce

Gen Alpha demonstrates a stronger inclination towards social commerce compared to Gen Z, with 57% of respondents reporting that they have made purchases through social commerce platforms, while only 43% of Gen Z have done the same. This highlights Gen Alpha's both willingness and tendency to be influenced on socials. This trend is further emphasized by their engagement in live-stream shopping, where 40% of Generation Alpha have participated in such purchases, compared to just 27% of Gen Z. These findings indicate that Generation Alpha is not only more receptive to innovative shopping methods but also more willing to integrate social media into their purchasing decisions.

Nearly half of females (45%) allocated over 50% of their annual budget to apparel this past year, compared with 40% of males

What percentage of your total budget was spent on apparel over the past 12 months?



Nearly a quarter of the youth aspire to be an influencer

Which of the following careers are you currently pursuing or most interested in pursuing in the future?



22%

Of the youth aspire to be or are currently pursuing a career as a creator/influencer

19%

Of the youth aspire to be or are currently pursuing a career as a medical or healthcare professional

19%

Of the youth aspire to be or are currently pursuing a career as an artist/performer

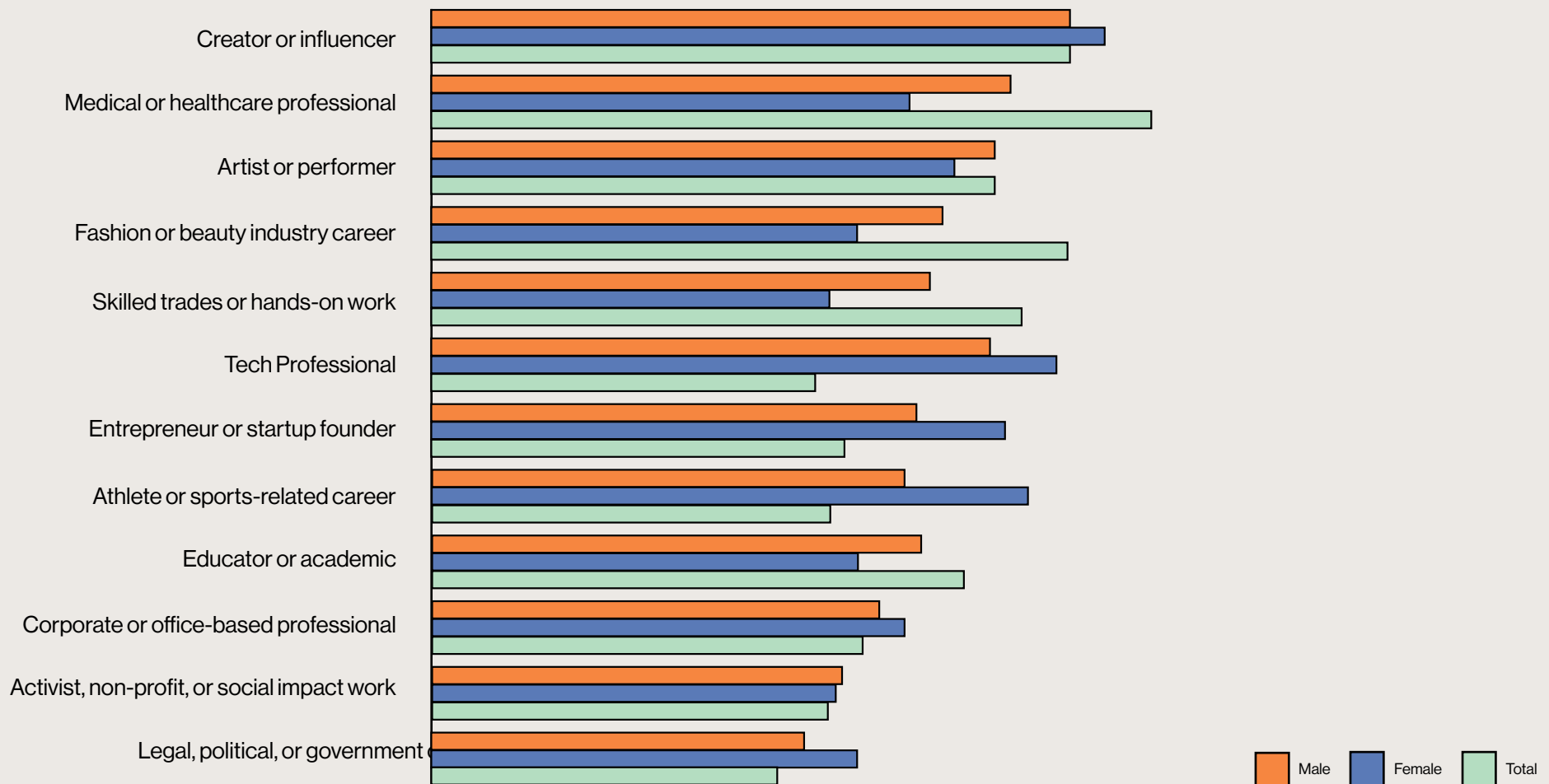
18%

Of the youth aspire to be or are currently pursuing a career within fashion or beauty

Females are more likely to be pursuing a career as a medical/healthcare professional

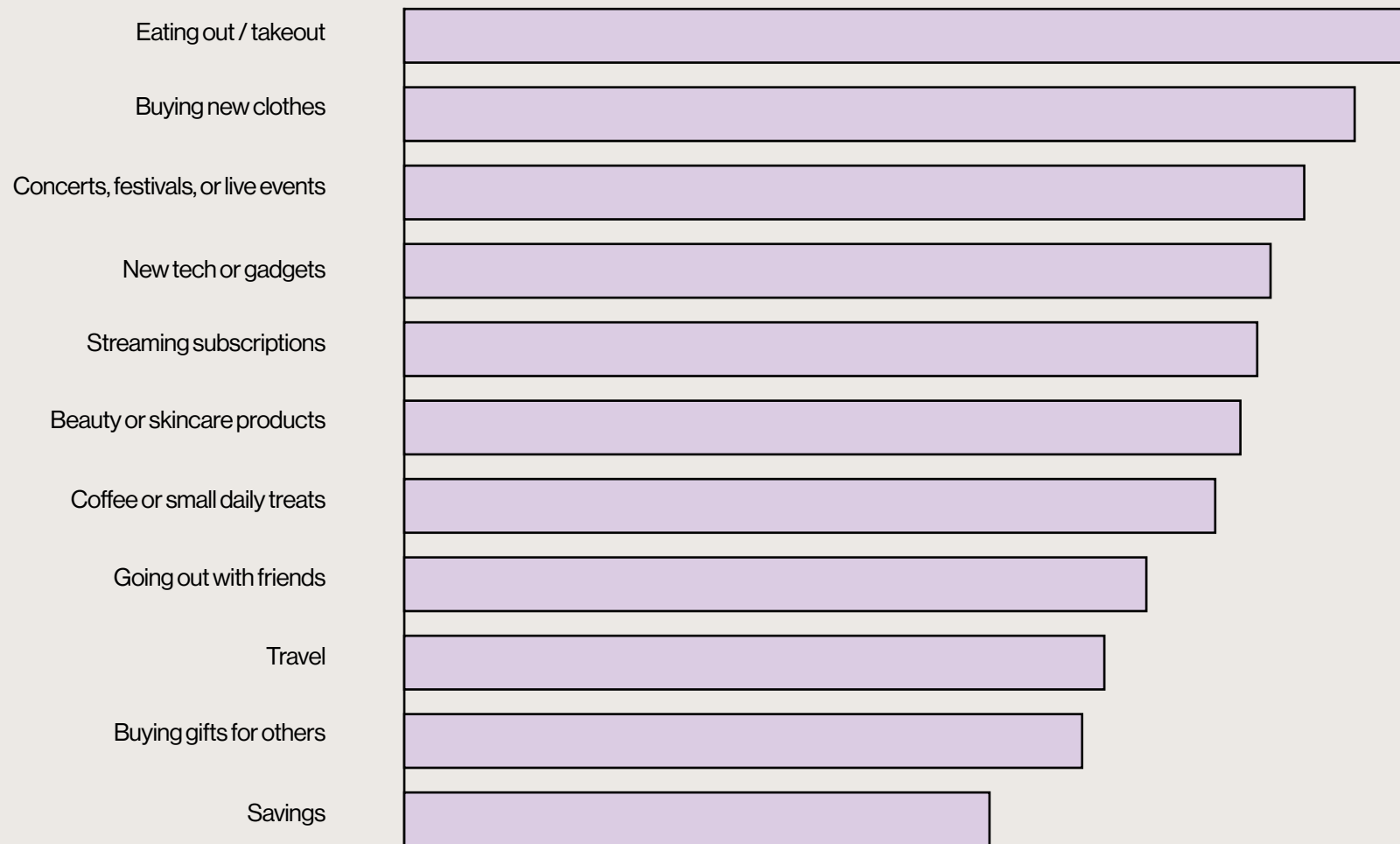
Finances

Which of the following careers are you currently pursuing or most interested in pursuing in the future?



The youth are more likely to cut back on buying new clothes than they are buying beauty/skincare

When money is tight, which of the following are you most likely to cut back on or give up?





Mental Health



—▶ Insights into perceptions around mental health among the youth

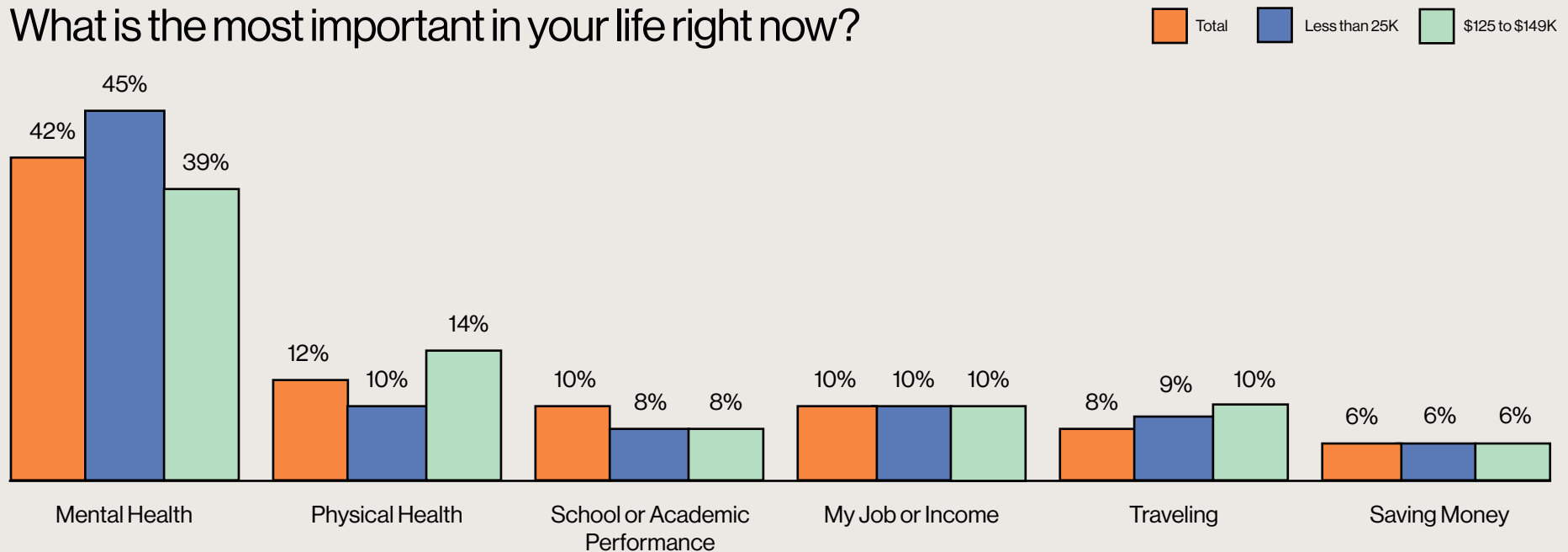


Mental Health



Mental health is the most important factor to the youth

What is the most important in your life right now?



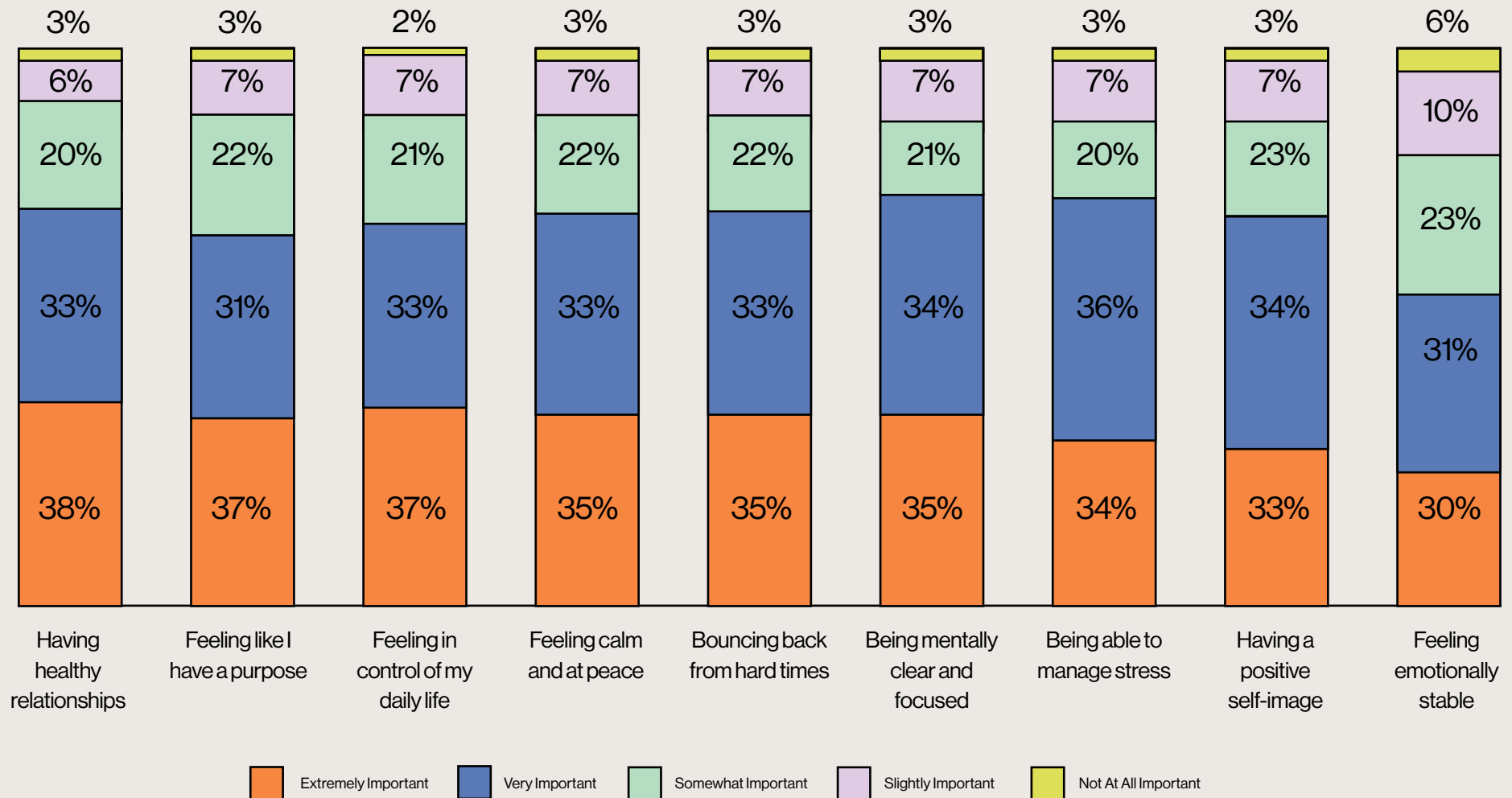
Mental health vs physical health among youth by household income

Youth in lower income households (under \$25k) demonstrate a greater concern for mental health issues compared to their higher-income counterparts, who tend to prioritize physical health. While mental health remains the most important issue for both groups, a higher percentage of lower-income youth (45%) identify it as their top concern compared to 39% of those with a household income between \$125,000 and \$149,000. This suggests that those from lower income households are less able to access mental health support options, such as therapists, and therefore preserving mental health is of greater importance to them.



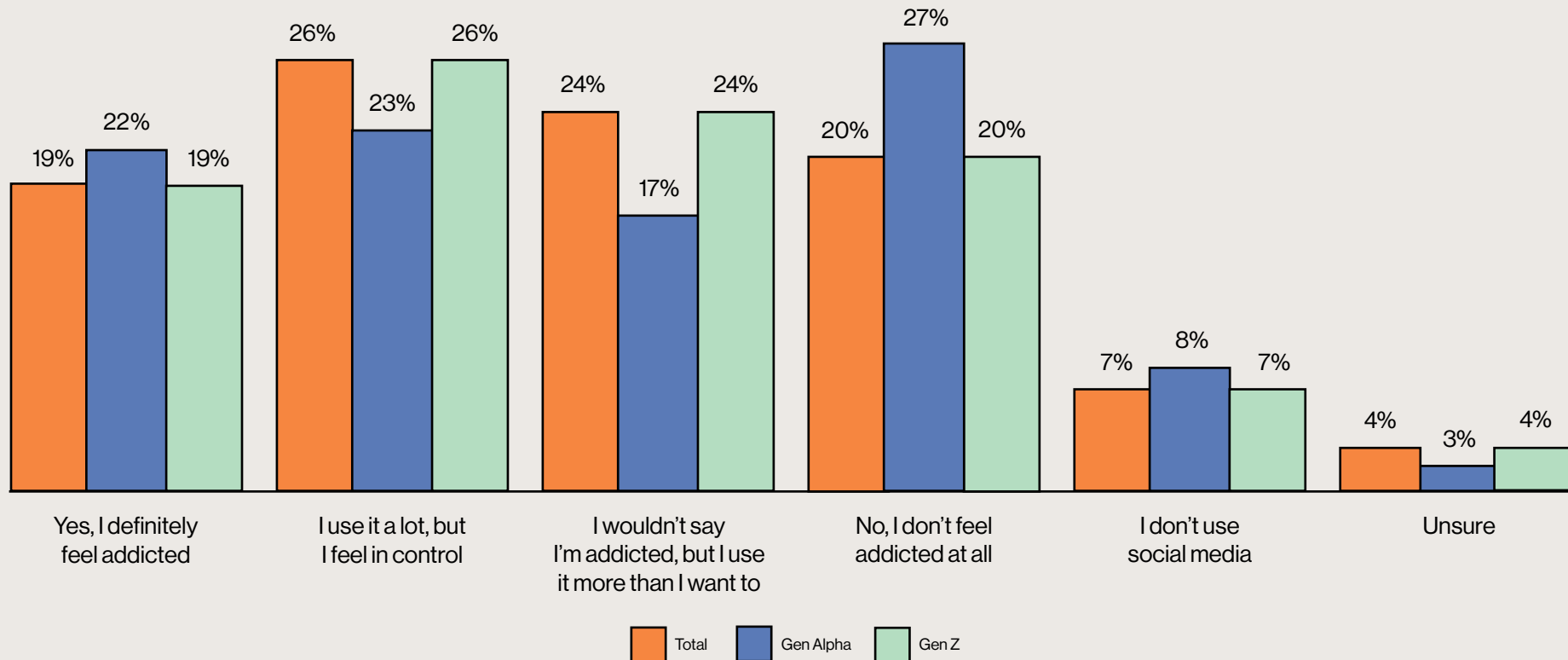
Healthy relationships and feelings of purpose are viewed as top elements essential to mental health

When you think about what mental health means to you personally, how important are each of the following?



Social media addiction is more common among Gen Alpha

Do you feel addicted to social media?

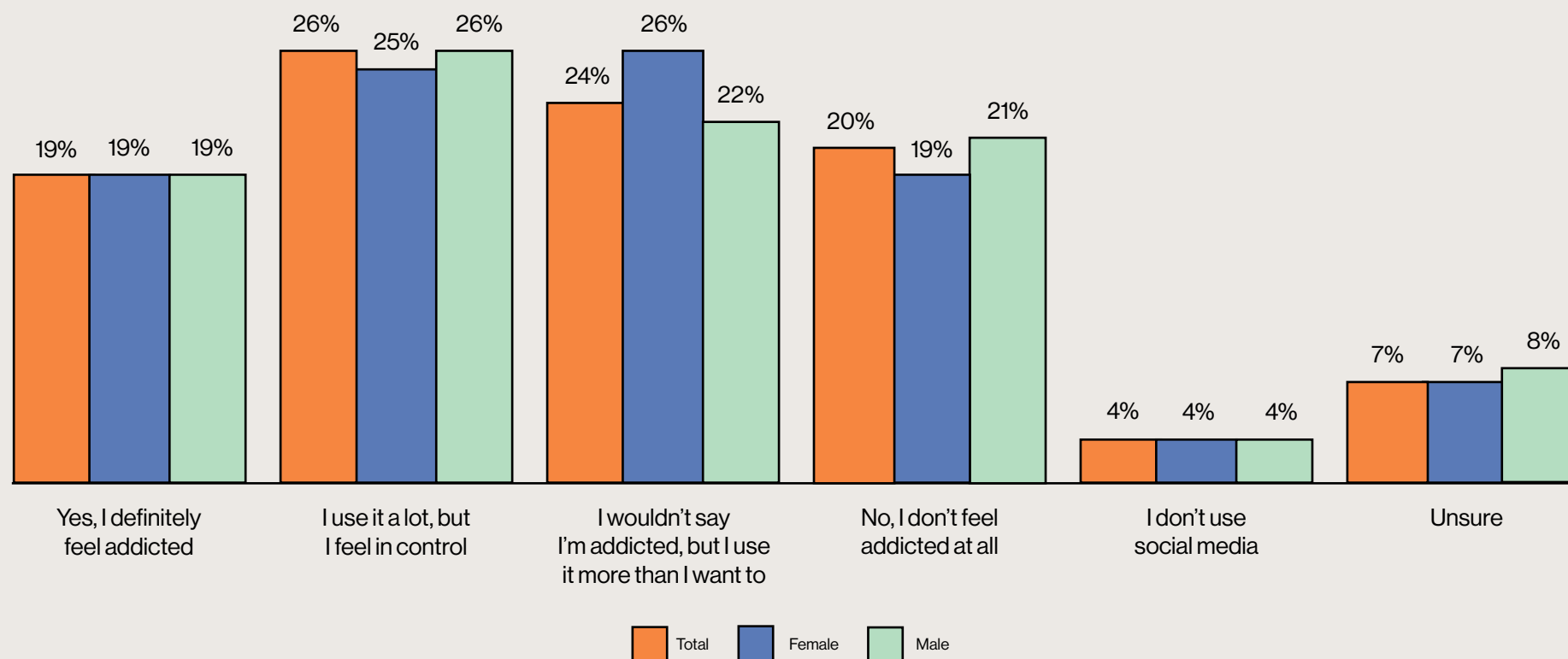


Social media addiction is more common among Gen Alpha

However, Gen Alpha are more likely to claim that their experience on social media is mostly positive, compared with Gen Z, suggesting that this 'addiction' is not wholly bad. It's worth caveating the above with the fact that Gen Alpha are younger, and therefore more likely to still be in the novelty stage of social media usage. Whereas, for Gen Z this novelty aspect will have somewhat worn off, and they may have started to see delayed negative side effects of social media usage or only realized those negative impacts with age.

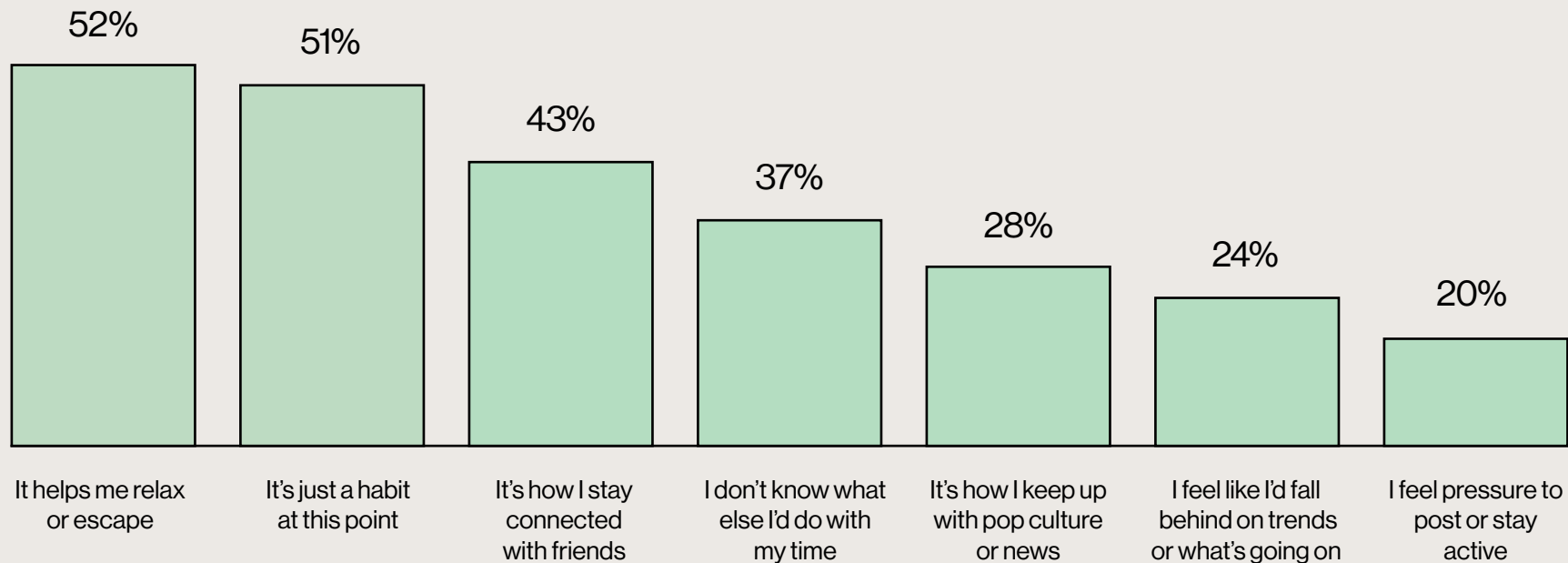
There is little discrepancy between gender when it comes to social media addiction

Do you feel addicted to social media?



Social media provides a form of escapism

What are the biggest reasons you don't spend less time on social media, even if you want to?



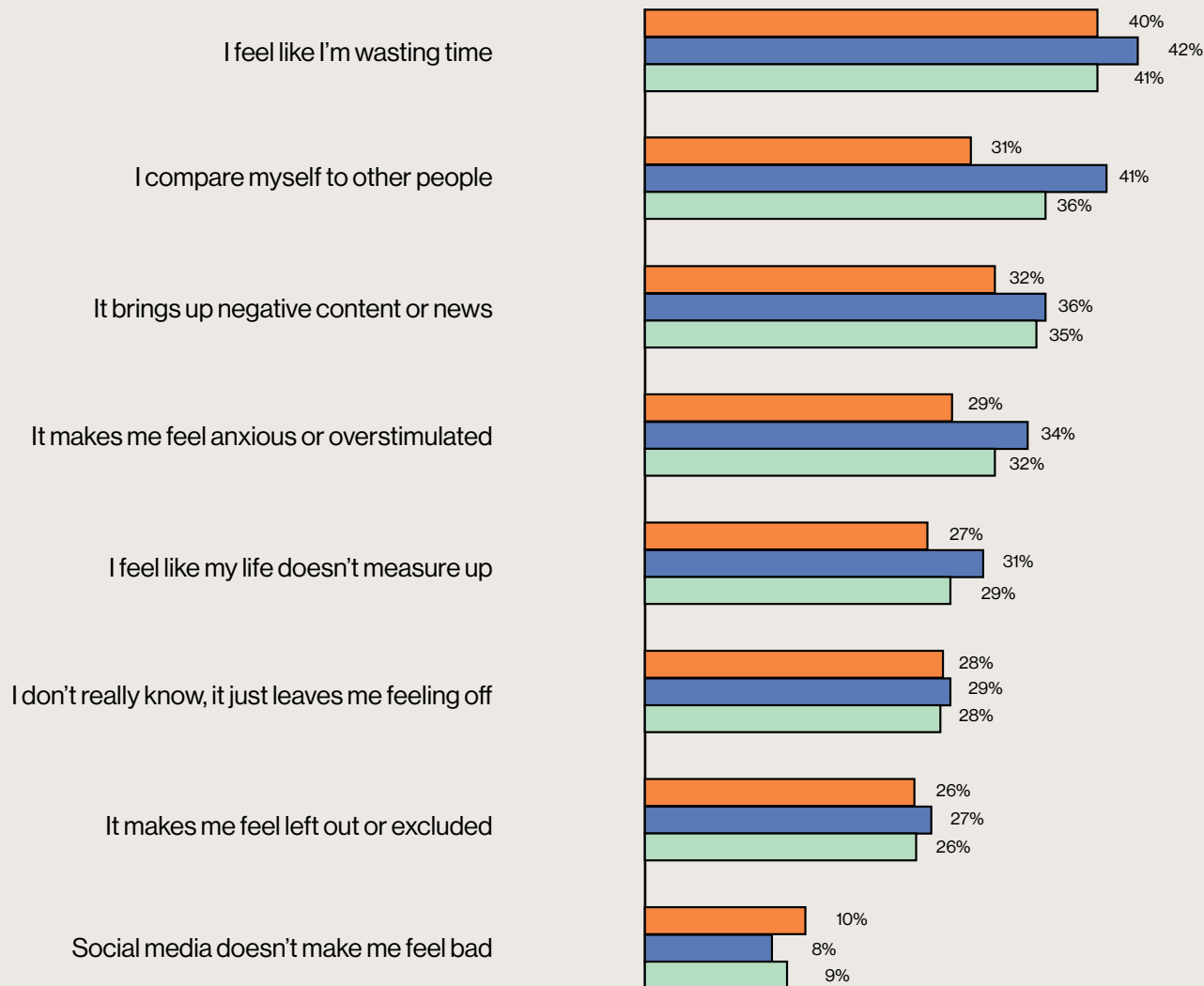
Social Media's Dual Role: Connection and Compulsion

The youth reveal a complex relationship with social media, whereby 52% cite it as a means to relax or escape, while 51% acknowledge it has become a habitual part of their daily lives. However, a notable 20% feel pressure to remain active or post regularly, indicating that while social media serves as a source of comfort and connection, it also imposes a sense of obligation that complicates desire to reduce screen time.

This underscores the need for balance between personal well-being and social expectations in the digital age.

Comparison is the thief of joy for females

When social media makes you feel bad, what's the biggest reason why?



Time wasting and comparisons hinder experience on socials

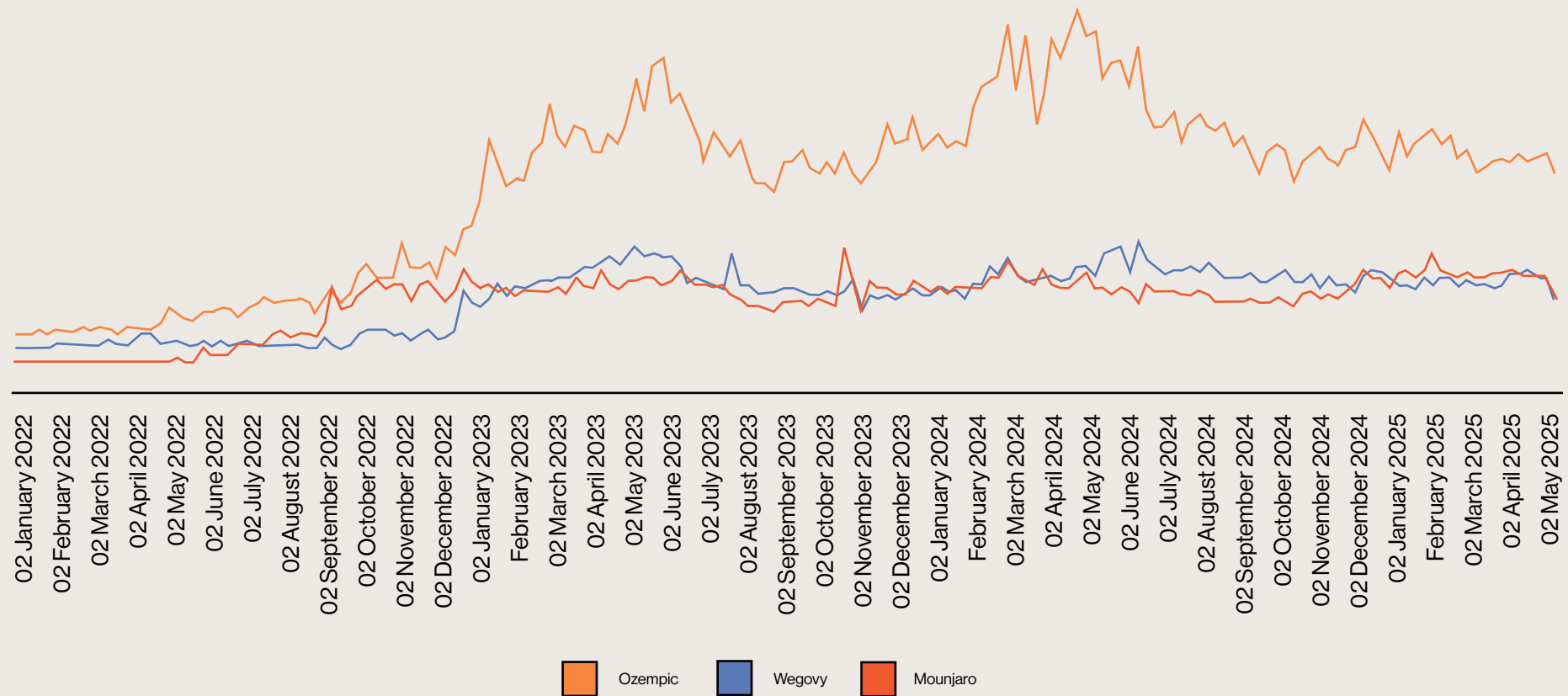
One in four claim that feeling like they're wasting time is a key reason for negative feelings when on social media, with this feeling common across both genders. However, females are much more likely to cite comparisons to other people as a driver of negative sentiment when on socials. This points to the often-unobtainable aesthetics which are showcased on platforms such as Instagram and TikTok, with these portrayals placing a disproportionate amount of pressure on young females.

■ Total
 ■ Female
 ■ Male

Searches of weight loss drugs dip as usage becomes an increasing norm

Negative sentiment around social media has been intensified by comparison behaviors, particularly as weight loss drugs become an increasing norm.

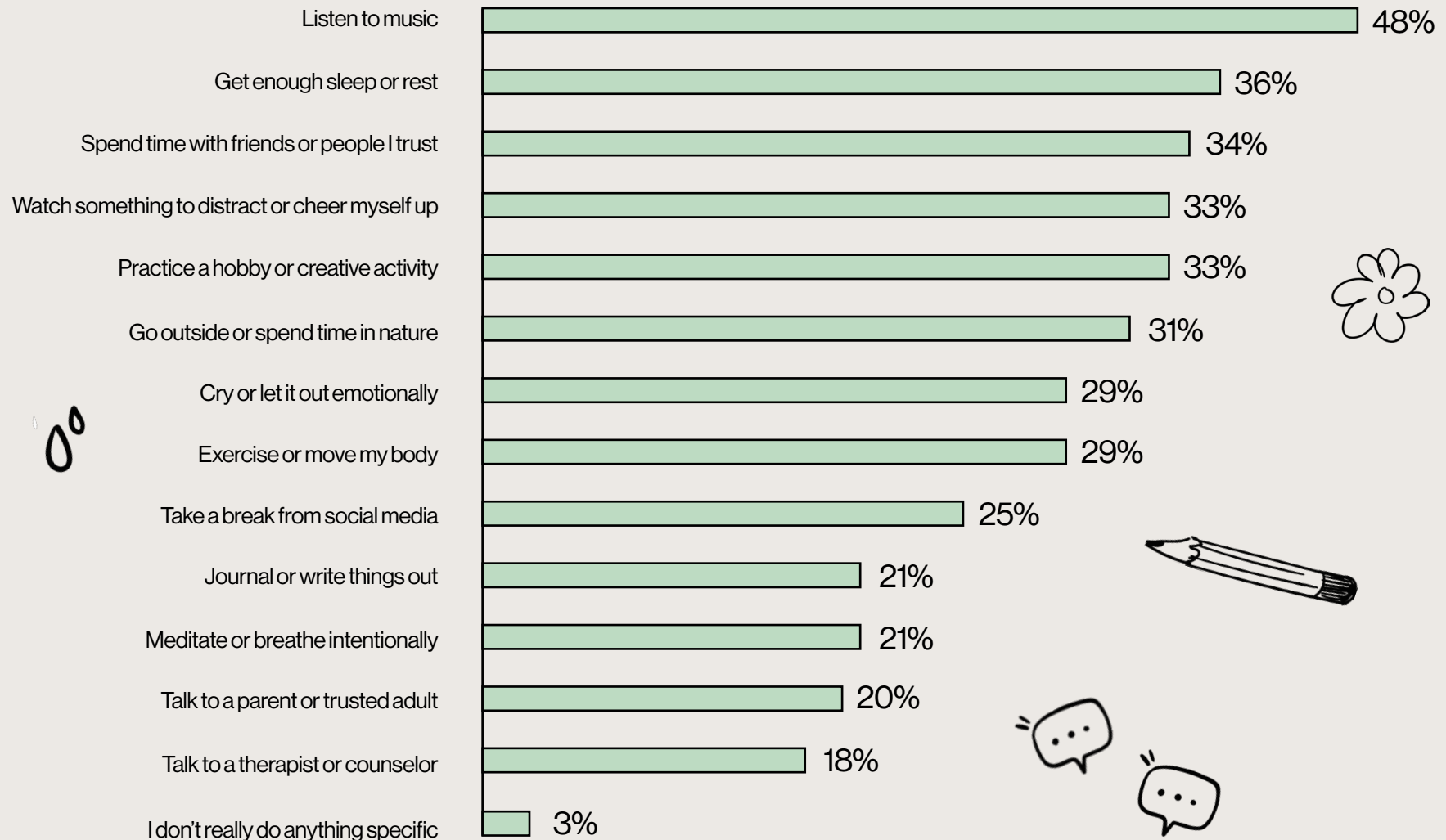
Data published in 2024 stated that the number of 12 – 25-year-olds using any GLP-1 drug — including older medications first approved to treat diabetes in 2005 and for weight loss in 2014 — climbed from about 8,700 a month in 2020 to more than 60,000 a month in 2023, a nearly 600% increase.



Music offers a sense of escapism

Mental Health

What do you personally do to take care of your mental health or feel better when you're struggling?



Appendix

About Global Data

GlobalData is a leading provider of data, analytics, and insights on the world's largest industries.

In an increasingly fast-moving, complex, and uncertain world, it has never been harder for organizations and decision makers to predict and navigate the future. This is why GlobalData's mission is to help our clients to decode the future and profit from faster, more informed decisions. As a leading information services company, thousands of clients rely on GlobalData for trusted, timely, and actionable intelligence. Our solutions are designed to provide a daily edge to professionals within corporations, financial institutions, professional services, and government agencies.

Unique Data

We continuously update and enrich 50+ terabytes of unique data to provide an unbiased, authoritative view of the sectors, markets, and companies offering growth opportunities across the world's largest industries.

Expert Analysis

We leverage the collective expertise of over 2,000 in-house industry analysts, data scientists, and journalists, as well as a global community of industry professionals, to provide decision makers with timely, actionable insight.

Innovative Solutions

We help you work smarter and faster by giving you access to powerful analytics and customizable workflow tools tailored to your role, alongside direct access to our expert community of analysts.

One Platform

We have a single taxonomy across all of our data assets and integrate our capabilities into a single platform – giving you easy access to a complete, dynamic, and comparable view of the world's largest industries.