



BASIS
Signals

Gen Z's New Rules for Growth

Welcome to Signals, our new flagship content series for businesses who need to see what's coming next.

Shifts you can't afford to ignore

Welcome to Signals, our new flagship content series for businesses who need to see what's coming next.

Signals isn't your standard trend report. It's powered by our Ideas First methodology. Using proprietary AI tools, we analyze millions of real-time public conversations and cultural signals to identify patterns in how people act, think, live, and buy.

For this edition, we validated these patterns against published studies and external data sources across social, search, online communities, blogs, and media. The result is a credible, cross-category view of the attitudes and behaviors shaping the market today. Those are the signals: decoded by our experts to show what they mean commercially and how brands can act on them.

Each quarter, Signals will bring together the cultural and commercial shifts you need to stay ahead, and translate noise into actionable insight.





We start with Gen Z

Not because they're the youngest, but because they're the most economically powerful generation you might not be ready for. Today, Gen Z spans ages 13–28. Many are already young adults making major life decisions. That means they're getting married, buying homes, starting families, while still being treated by most brands as if they're teenagers.

By 2030, Gen Z will account for nearly \$12.6 trillion in global spending, the highest share of any generation in history. Yet most brands still treat them as a lifestyle segment, not a strategic growth engine.

Spotting behavioral shifts is one thing. Acting on them is what drives growth. This is Signals. And Gen Z is just the start.

Integrated Intelligence in action

Signals is built on a simple belief: AI doesn't replace human research, it amplifies it.

We call this Integrated Intelligence: the orchestration of AI's scale and speed with human judgment and commercial framing.

Basis Signals uses AI to translate unstructured data from social, search, online communities, blogs, and media into foresight leaders can act on. Each edition turns cultural noise into commercial clarity, showing what's shifting now and what to do about it.

Here's how Signals works in practice:



AI to detect

Our proprietary tools analyze millions of real-time data points across social, search, and online conversations to surface emerging trends, tensions, and opportunity areas.



Humans to decode

Our experts interrogate those signals, connecting cultural context with commercial impact.

Signals pairs AI's scale with human interpretation to reveal what's changing and why. We then recommend tailored research pathways to validate and build on these findings, bringing an AI-first mindset to explore how they play out for your specific brand needs.

Together, this gives us a fuller, faster read of consumer behavior and a 360° view of what's now, what's next, and what to do about it.

The Gen Z dilemma: eco-conscious but addicted to fast fashion



BACKGROUND

Image to illustrate the temptation of fast fashion. Shein pop-up store in Hamburg, Germany (March 2024). Credits: Shein

Generation Z



Why Gen Z are staying indoors for days

Across all generations, just a quarter of people make a conscious effort to step outside at least once a day, study finds

Gwyn Wright

16 Sep 2025, 6:30am

Forget generic Gen Z headlines.

This isn't another list of clichés. It's four real shifts in how Gen Z spends, lives, decides and socializes.

These are not trends to watch. They are signals to act on.

Millennials and Gen-Z have higher rates of climate worry

5 July 2023



Gen Z are **spending** differently

VIBE OVER VALUE

What your boss needs to hear

For Gen Z, spending is as much about self-expression as affordability. They'll skip essentials but happily splurge on scaled-down indulgences, whether it's a \$7 matcha, a collectible charm, or a thrifted statement piece from sites like GOAT Group, that deliver a taste of luxury and signal who they are.

If you believe loyalty is built on price or convenience alone, you're missing how Gen Z actually decides. They buy into symbols, stories, and vibes, and they'll pay more when a brand reflects their identity and values.

From now until 2035, virtually all consumer spending growth is projected to come from Gen Z. They are not a niche group. They are your next growth engine.



Status lives in the details

3 in 4 Gen Z are more likely to buy if they can customize the product

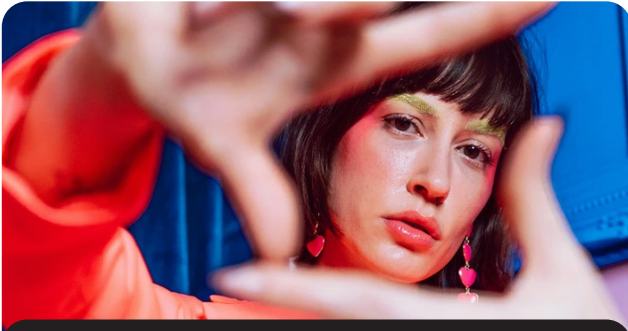
Over half of Gen Z use 'Buy Now, Pay Later' to make vibe-driven purchases affordable

The signal unpacked

Gen Z's wallets tell two stories. On one side, they're pragmatic: hunting second-hand on Depop, Mercari or Vinted, delaying big-ticket buys, and leaning on payment plans to make ends meet. On the other, they're expressive: spending on luxuries, collectibles, and drops that carry meaning beyond price.

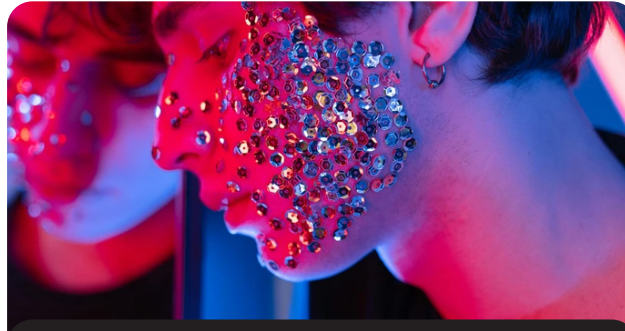
These aren't contradictions. Purchases are communication. A sneaker, a trinket, even a coffee brand becomes shorthand for values, humor, or identity. The price matters, but emotional relevance secures loyalty.





Aesthetic over affordability

From meme tees to symbolic jewelry, 36% say they buy to display beliefs. Every choice signals their identity or offers an ironic nod to nostalgia.



Customization counts

Ownership now means co-creation. With 30% calling themselves 'creators' and a quarter 'influencers', Gen Z flock to products they can customize, remix, or shape themselves.



Tiny signals, big status

From patches and charms to vintage finds, Gen Z express identity through low-cost, high-meaning pieces. Two in five say they shop secondhand precisely to find unique items. These markers are low-cost, high-recognition assets. Flexible enough to swap as identity evolves, and powerful enough to stand out.



Flexible frugality

9 in 10 say they're open to frequent "splurge" spending on small luxuries that signal self-care or identity. For them, frugality and indulgence aren't opposites: they're two sides of the same approach to their finances. Brands that help Gen Z flex between the two will win long-term loyalty.



Loyalty without transaction

For Gen Z, advocacy itself is loyalty. Sharing or repping a brand they vibe with counts, even without purchase. As their spending power grows, cultural presence today can translate into commercial impact tomorrow.

What it means for you

Gen Z save hard where they must, then spend freely when a purchase feels right. To stay relevant, balance affordability with cultural and aesthetic resonance.

What to consider:

Design for self-expression

Make identity part of the product. Symbols, drops, and customization can build loyalty without big-ticket purchases.

Sweat the small stuff

Collectibles, accessories, and add-ons drive repeat engagement and travel across networks as signals of belonging.

Redefine affordability

Payment flexibility, subscriptions, and rent-to-own help Gen Z stretch budgets without losing identity.

Essentials made aspirational

With financial and social pressures, even quality basics sometimes feel out of reach. Brands that make those essentials attainable and identity-affirming will build long-term trust.

Takeaway for your team

Gen Z's spending is a cocktail of pragmatism and expression. They'll cut back on certain basics or spread payments just to afford the items that feel most "them."

Brands that help them balance both sides will win out.



What next?

One way to act:

Test how payment flexibility options like subscriptions, Buy Now, Pay Later, or rent-to-own shape Gen Z's willingness to spend on identity-driven items.

Find out more in our dedicated one pager

Take a look >

Gen Z are **living** differently

INFLATIONSHIP VS IN-NESTERS

What your boss needs to hear

Financial pressures are reshaping Gen Z's relationship with the home. Some are fast-tracking romance to split the rent. Others are staying in their childhood bedrooms well into their thirties.

If your brand still equates adulthood with independence or traditional spending patterns, you are already behind. Gen Z's emotional and economic lives are blurring, and they're rewriting the rules of co-living, intimacy, and identity in the process.



Moving in too soon vs. not leaving at all

Almost
1 in 2

Gen Z adults still live at their family home

2 in 5

Gen Z adults would move in with a partner purely to save money

The signal unpacked

Rip up conventional timelines. Gen Z are mapping milestones to affordability, not age.

Their spending power is rising fast. But how they spend, when they spend, and what they're willing to sacrifice is changing. Independence, intimacy, and even romance is being weighed against the cost of living.

Some are accelerating relationships purely for economic reasons. In the UK, 24% of young adults say they'd move in with a partner earlier than planned to save money. In the US, nearly 40% say they'd do so even if they were not emotionally ready. In fact, as of last year, the number of 18–24-year-olds in the US who are living with a partner reached an all-time high of 11%.

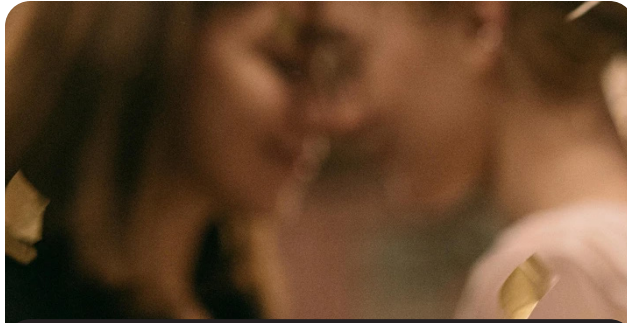
But others are delaying independence altogether. Nearly half of Gen Z adults still live at home. With rents rising and wages stagnant, independence is no longer a given: it is a luxury. The home is not a launchpad, it is a holding pattern.





Money is a dating filter

46% of Gen Z would choose long-term financial stability over romantic love. Welcome to the era of 'cash-candid dating', where conversations about debt, salary, and shared goals happen up front.



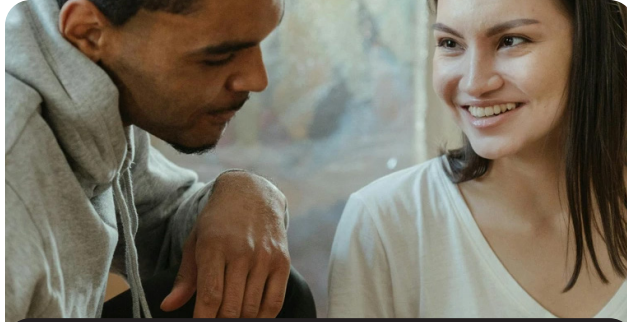
They're formalizing relationship

Gen Z are pragmatic. 47% would sign a cohabitation agreement before moving in with a partner. For many, living together is less about romance and more about protecting financial futures.



Roommates rewritten

More couples are living with friends or family, turning the home into a shared, flexible space shaped by practicality over privacy. In the UK alone, there has been a 67% increase in couples living alongside friends compared to pre-pandemic levels



The "singles tax" is real

A quarter of Americans say they've stayed in a relationship they would have ended, if they could afford to. Breakups are expensive, and money keeps people together longer than love might.

This points to new consumer priorities, reshaped purchase journeys, and rising demand for products, services, and messaging that reflect shared,

What it means for you

Gen Z are navigating relationships, independence, and adulthood through the lens of affordability and flexibility. Brands that still map outdated milestones risk missing relevance entirely.

What to consider:

Rethink life stages

Build segmentation frameworks that reflect hybrid, shared, and transitional living arrangements, and capture the shifting motivations, challenges, and excitement behind Gen Z's milestones.

Reflect reality in messaging

Build segmentation frameworks that reflect hybrid, shared, and transitional living arrangements, and capture the shifting motivations, challenges, and excitement behind Gen Z's milestones.

Design for shared living

Stopgap living is the norm. Enable multiple users, shared ownership, and small-space solutions. From modular furniture to bundled services, design with communal living in mind.

Make autonomy affordable

Even in shared or short-term spaces, Gen Z want to express themselves. From décor kits to portable “status” products, give them ways to make their space their own.

De-risk commitments

Lower the barriers to financial independence. From flexible joint accounts to subscriptions and try-before-you-merge tools, help Gen Z take steps without high stakes.

Takeaway for your team

Gen Z's living arrangements are their customer journeys. If your product assumes privacy, permanence, or predictability, chances are, it's misaligned.

Build for shared lives, transitional spaces, and financial caution, or risk being overlooked by the generation driving your future growth.



What next?

One way to act:

Test demand for bundles, dual-use products, and flexible tiers designed for the realities of shared living.

Find out more in our dedicated one page

Take a look >

Gen Z are deciding differently

AI AS LIFE CURATOR

What your boss needs to hear

Gen Z aren't searching. They're outsourcing.

Where older generations once 'Googled it', Gen Z expect algorithms and AI to do the heavy lifting. TikTok's AI-driven For You feed surfaces content with uncanny precision, while tools like ChatGPT are on hand as always-on advisors.

Social-first and AI-powered discovery has now replaced traditional search. TikTok, Instagram, and YouTube are the defaults for quick, visual, peer-validated answers, with AI chatbots and companions curating recommendations, advice, and even informing life-altering decisions.

If your strategy still assumes Gen Z will land on your brand via Google, paid ads, or direct visits, you're already off their radar.



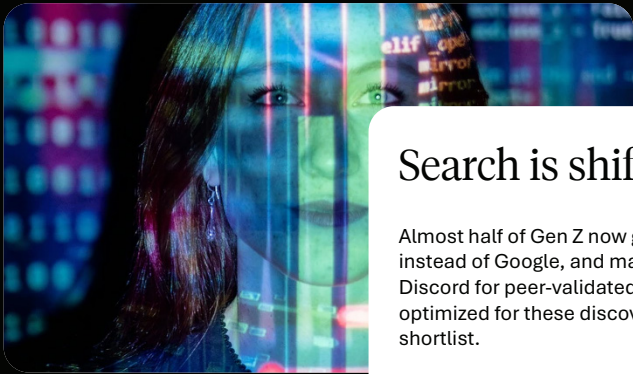
AI in the passenger seat

6 in 10 of Gen Z prefer searching with AI tools like ChatGPT and Gemini over traditional search engines

3 in 4 Gen Z consumers have used AI chatbots when shopping online

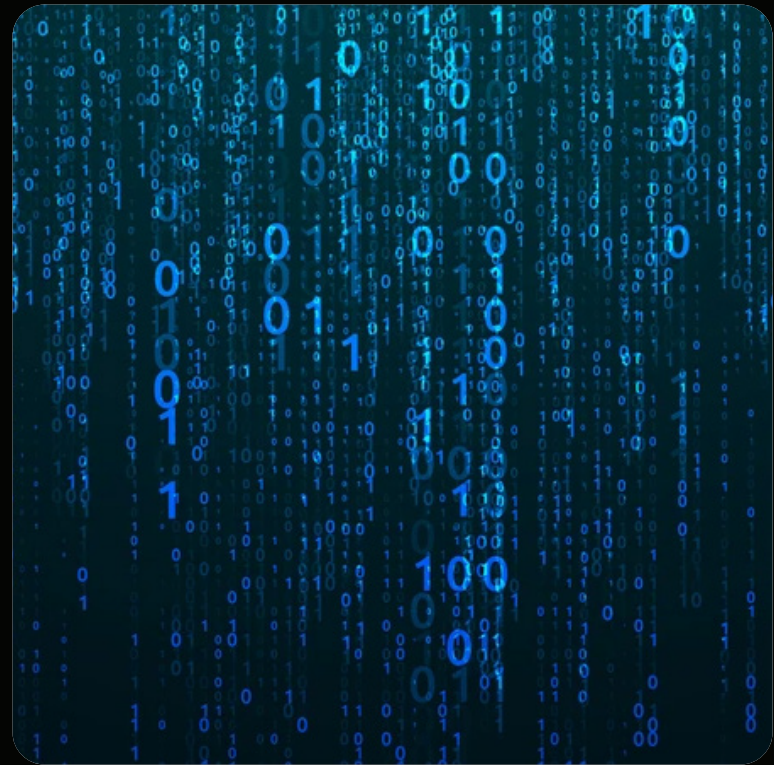
The signal unpacked

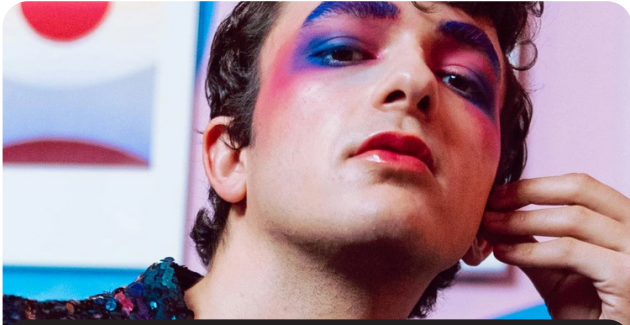
For Gen Z, algorithms are advisors. It's not just about faster search results. It's about letting AI guide what they consume, how they express themselves, and the biggest decisions of their lives.



Search is shifting

Almost half of Gen Z now go to TikTok, Instagram, or YouTube instead of Google, and many are also turning to Reddit and Discord for peer-validated answers. If your content is not optimized for these discovery platforms, you won't make the shortlist.





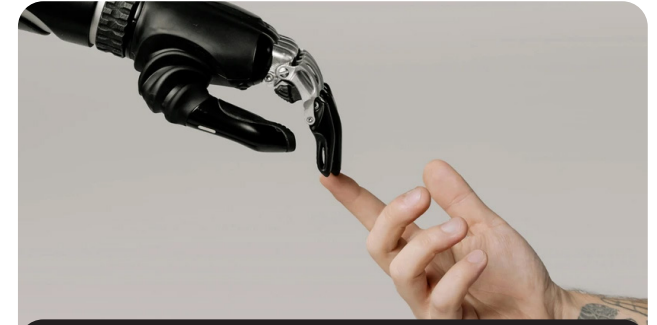
Shopping is curated

Whether it's comparing products, finding deals, and getting personalized recommendations, three in four are using AI tools like ChatGPT or Copilot while shopping online. Product discovery and conversion now sit in the hands of algorithms, not search engines or ads.



Identity is co-created

From playlists and wellness hacks to avatar skins and style choices, AI isn't just delivering content, it's enabling self-expression. For Gen Z, identity now spans both physical and digital realms, with 84% saying their real-world fashion is influenced by how they style their avatars.



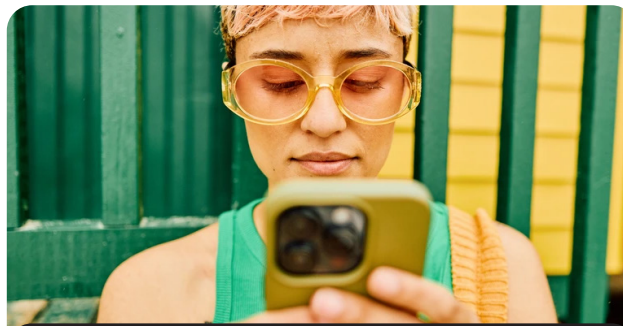
Careers are co-piloted

Two in five are using AI for job search tips, interview prep, and career planning, outsourcing milestones once shaped by mentors, schools, or employers. Employer brands that don't show up in AI-mediated pathways risk being overlooked.



Relationships are rehearsed

From conversation starters and crafting profiles to AI dating assistants such as Rizz and Keepler, nearly half of Gen Z singles are using AI in their dating lives, as they look to practice social skills and boost confidence.



Finances are outsourced

Whether budgeting, micro-investing, or running the day to day, 8 in 10 Gen Z are leaning on AI for financial advice.



Support is digital

Wellness, health, and lifestyle brands now compete with the 'friend that never says no.' Winning means adding the human value AI cannot.

What it means for you

Gen Z are letting algorithms curate their choices, from daily habits to big milestones. If your brand isn't showing up in those feeds, recommendations, or advisory tools, you risk becoming invisible.

What to consider:

Optimize for social search

Traditional SEO is no longer enough. Discovery starts on TikTok, Instagram, and YouTube. Make content visual, peer-validated, and algorithm-ready to get noticed where Gen Z actually search.

Design for AI engines

Answer engines like ChatGPT, Gemini, and Copilot are now curating product, content, and brand choices. If your content is not structured for algorithmic discovery, you will not make the shortlist.

Enable co-creation

AI-powered personalization and creative tools are now baseline expectations. Build experiences Gen Z can remix, customize, and shape themselves.

Embed advisory tools

Gen Z are turning to AI for life advice, from careers to finances, brands that integrate empathetic, stigma-free guidance into these platforms will earn relevance and trust.

Design for seamless ecosystems

Gen Z expect AI to connect across apps and devices. Partner with or build platforms that deliver frictionless, personalized experiences wherever they are.

Takeaway for your team

Gen Z are outsourcing decisions to algorithms. If your brand is not designed to be discovered, recommended, or validated by AI, you will not make the shortlist.

The winners will be the ones who build trust inside algorithmic pathways, show up in AI-mediated searches, and prove relevance in the moments when Gen Z let machines guide their choices.



What next?

One way to act:

Map how Gen Z's path to purchase shifts when discovery starts with TikTok or ChatGPT, not Google.

Find out more in our dedicated one page

Take a look >

Gen Z are socializing differently

THE RISE OF THE MICRO-EXPERIENCE

What your boss needs to hear

Big nights out are a thing of the past. Gen Z are building social lives around small, intentional moments that are affordable, repeatable, and shareable.

From pop-up galleries and immersive art nights to rooftop yoga and running clubs, Gen Z value intimacy, novelty, and identity-affirming moments they can document and share. Large-scale gatherings feel overwhelming, expensive, and out of step with their reality.

Mass experiences and broad cultural moments are waning. Micro moments keep a sense of progress and joy alive without requiring the long wait (and high stakes) of 'big life moments.'



Micro is mainstream

3 in 4

Gen Z say they feel more comfortable in small-group settings than at large-scale gatherings

Over
60%

would rather attend interactive pop-ups, workshops, or local events than concerts or festivals

The signal unpacked

Gen Z aren't socializing less; they're just socializing differently. UK data shows they go out or meet friends around 88 days a year: far more than other generations. But instead of big nights out, they're choosing smaller, curated, and more intentional formats.





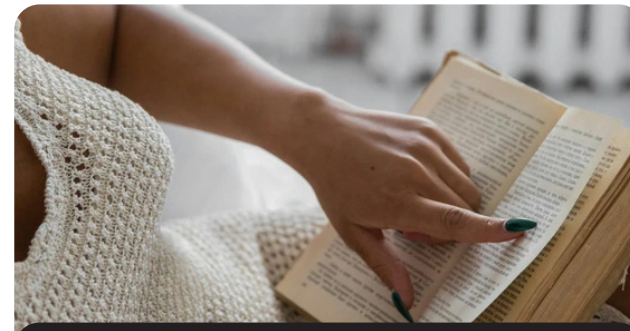
Snackable social life

Social media rewards bite-sized, shareable moments. A dinner party, an ambient co-working space, or a game night with friends translates better online than luxury holidays or messy nights out.



Comfort in scale

73% say they feel more comfortable in small-group settings than big crowds. That's why Gen Z are gravitating towards wellness gatherings and running clubs, which have grown 130% in the past year. These formats feel safer, lower risk, and easier to manage than mass events.



Micro as identity

Social settings double as self-expression. From wellness pop-ups to book swaps and craft workshops, curated group rituals signal values, belonging, and lifestyle choices. Even the rise of craft-focused meetups — with the number of knitting, crochet, jewelry, and pottery-making workshops up 34% in a year — points to a shift toward intimate, identity-affirming connection.



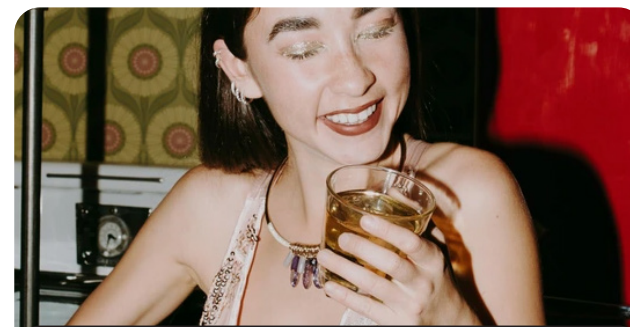
Status in frequency

It's not about rare, blowout milestones. Gen Z build status through frequent, intentional social rituals. By being the friend who hosts, curates, or documents everyday gatherings. Luxury is measured in repeatable, shared experiences, not one-off spectacles.



Rebuilding 'third spaces'

With fewer traditional gathering spots post-pandemic, Gen Z are looking for authentic "third places" like community centers, pop-up events, and creative workshops, where they can openly discuss wellness and mental health, rebuild social confidence and create meaningful ties beyond home or work.



Re-engaging with alcohol, selectively

The share of legal-age Gen Z who've had a drink in the past six months rose from 66% in 2023 to 73% in 2025. But rather than heavy nights out, moderation still dominates.

What it means for you

Gen Z are highly social, but they're curating smaller, more intentional formats. They want connection without the cost, scale, or stress of mass experiences. For brands, that means rethinking how you de-

What to consider:

Design for intimacy

Create activations, products, or services that feel built for smaller groups. From bookable micro-events to modular hospitality packages, make it easy to gather, share, and document.

Elevate the everyday

Help Gen Z turn small routines into shared rituals. Whether it's a coffee run with friends, a group workout, or a weekly dinner they host, align drops, rewards, discounts and campaigns with the moments they use to connect.

Make the everyday feel premium

Even when spend is small, the experience should feel elevated. Storytelling, packaging, and design cues can turn a \$10 purchase into a status-laden moment that's shared online.

Reward frequency, build loyalty

Shift loyalty from one-off campaigns to regular touchpoints. Recognition, gamified rewards, and rotating drops keep momentum alive.

Design hybrid spaces

Recognize that Gen Z social life blends online and offline. From livestreamed pop-ups to communities that extend IRL events into digital forums, create bridges that keep the vibe alive.

Speak to their wants

Craft brand activations or products that tap into micro-rituals and bite-sized experiences. It's less about pushing a grand lifestyle, and more about inserting yourselves into small, shareable moments with campaigns that celebrate small wins and daily joy.

Takeaway for your team

Gen Z aren't rejecting social life. They're reinventing it. They're not glued to their phones or saving for that one big milestone. Big nights out are giving way to curated, repeatable

Brands that design for intimacy, elevate the everyday, and make micro feel premium will earn their place in Gen Z's most meaningful moments, and follow them into their 30s and beyond.



What next?

One way to act:

Segment Gen Z by the micro-rituals they adopt — from running clubs to craft workshops — and map how these shape brand affinity.

Find out more in our dedicated one page

Take a look >

Final takeaways

Gen Z aren't waiting for your strategy to catch up

They're already reshaping categories with new rules for living, spending, deciding, and socializing. Micro-moments are overtaking milestones, and algorithms are steering choices long before traditional touchpoints come into play.

Signals exists to make sure you don't just see these shifts: you act on them. The brands that translate them into action first will set the pace for everyone else.



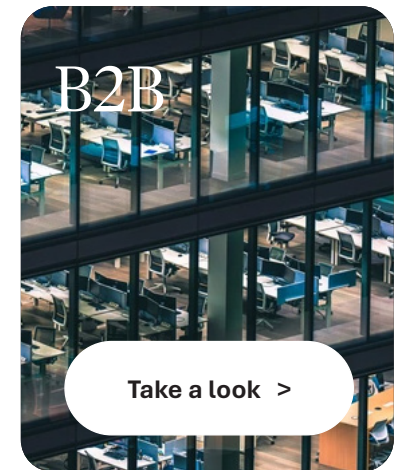
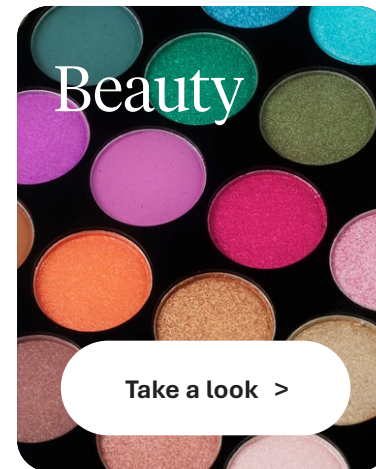
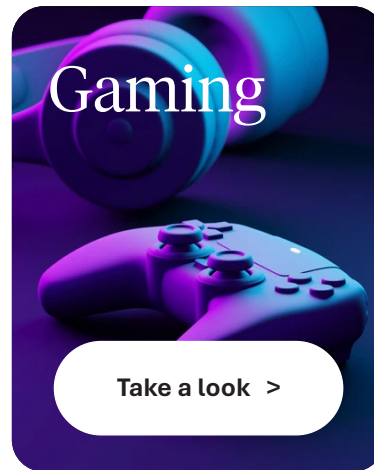
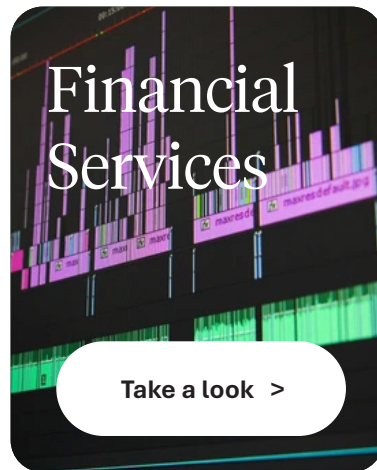
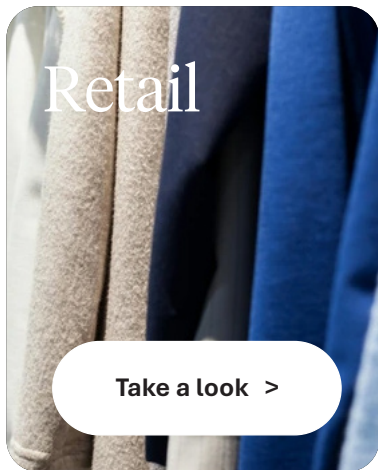
Remember, Gen Z aren't a future audience

They're the most powerful generation in the market today, already reshaping your category. The question isn't if you'll adapt, but how quickly you'll move to stay ahead.

Want to see how this plays out in your world? Download one of our sector-specific deep-dive sheets or get in touch to build something specific to your priorities.

Let's talk

Get in touch to find out what these signals mean for you,
or download one of our sector-specific sheets below.



Signals sources in order of appearance

1. By 2030, Gen Z will account for nearly \$12.6 trillion in global spending [Gen Z Will Be the Highest Spending Generation in History. Here's What to Know](#)

Spending differently

2. Gen Z projected to drive virtually all spending growth through 2035
[Searching for the consumer of tomorrow: The Gen Z opportunity | Visa](#)

3. 3 in 4 Gen Z are more likely to buy if they can customize the product
[Generation Influence: Gen Z Study Reveals a New Digital Paradigm](#)

4. Over half of Gen Z use 'Buy Now, Pay Later' to make vibe-driven purchases affordable
[How Gen Z shops and buys in 5 charts](#)

5. 36% say they buy to display beliefs
[2021 Consumer Culture Report](#)

6. 30% calling themselves 'creators' and a quarter 'influencers'
[Hubspot Consumer Trends Report](#)

7. 2 in 5 say they shop secondhand precisely to find unique items
[Gen Z's fascination with secondhand apparel: Depop sees large brand equity gains among younger consumers, according to Ad Age - Harris Poll brand tracker](#)

8. 9 in 10 say they're open to frequent "splurge" spending on small luxuries that signal care or identity.
[94% of Gen Z say they like splurging on 'little treats' that bring joy](#)

Living differently

9. Almost 1 in 2 Gen Z adults still live at their family home.
[Nearly Half of All Young Adults Live With Mom and Dad — and They Like It](#)

10. 2 in 5 Gen Z adults would move in with a partner purely to save money
[Move-In-flation: 23% of Singles Would Fast-Track Cohabitation for Financial Relief](#)

11. In the UK, 24% of young adults say they'd move in with a partner earlier than planned to save money.
[So, you're in an inflationship... - The Face](#)

12. the number of 18–24-year-olds in the US who are living with a partner reached an all-time high of 11%.
[Inflation Pushes Gen Z Couples to Move In Together at Record Rates - Bloomberg](#)

13. REPEAT - Almost 1 in 2 Gen Z adults still live at their family home.
[Nearly Half of All Young Adults Live With Mom and Dad — and They Like It](#)

14. 46% of Gen Z would choose long-term financial stability over romantic love.
[Nearly half of Gen Z would pick money over love, new survey finds](#)

15. 47% would sign a cohabitation agreement before moving in with a partner.
[Living Together in the 2020s: Why more Gen Z's are Saying 'Yes' to Cohabitation Agreements](#)

16. 1 in 4 Americans say they've stayed in a relationship they would have ended, if they could afford to.
['Too broke to break up': More Americans than ever are staying in relationships — because they can't afford to be single](#)

17. 67% increase in couples living alongside friends
['We have to flatshare to afford our rent' - The Times](#)

Deciding differently

18. 6 in 10 of Gen Z prefer searching with AI tools like ChatGPT and Gemini over traditional search engines
[The rise of the personal AI advisers](#)

19. 3 in 4 Gen Z consumers have used AI chatbots when shopping online
[7 out of 10 Gen Z shoppers use AI to buy online | IESE Insight](#)

20. Almost half of Gen Z now go to TikTok, Instagram, or YouTube instead of Google
[GenZ Dumping Google For TikTok, Instagram As Social Search Wins](#)

21. REPEAT - Three in four are using AI tools like ChatGPT or Copilot while shopping online
[7 out of 10 Gen Z shoppers use AI to buy online | IESE Insight](#)

22. 84% saying their real-world fashion is influenced by how they style their avatars.
[Virtual to Reality: 84% Say Their Avatar Style Impacts Their IRL Looks](#)

23. Two in five are using AI for job search tips, interview prep, and career planning, outsourcing milestones once shaped by mentors, schools, or employers.
[Gen Z turns to ChatGPT for career advice](#)

24. 8 in 10 Gen Z are leaning on AI tools to manage their money.
[80% of Gen Z and millennials are turning to AI for financial advice](#)

25. Over 60% would rather attend interactive pop-ups, workshops, or local events than concerts or festivals
[Eventbrite's New Report Reveals Emergence of "Fourth Spaces" As Gen Z and Millennials Look to Bridge Their Digital and Physical Worlds](#)

26. UK data shows they go out or meet friends around 88 days a year
<https://www.opinium.com/socialising-in-the-uk-how-adults-connect-and-whats-holding-them-back/>

27. running clubs, which have grown 130% in the past year.
[Gen Z is radically transforming the events space - Thred Website](#)

28. REPEAT - with the number of knitting, crochet, jewelry, and pottery-making workshops up 34% in a year
[Gen Z is radically transforming the events space - Thred Website](#)

29. The share of legal-age Gen Z who've had a drink in the past six months rose from 66% in 2023 to 73% in 2025.
[Non Alcohol Is No Longer a Niche—It's a Billion-Dollar Movement](#)