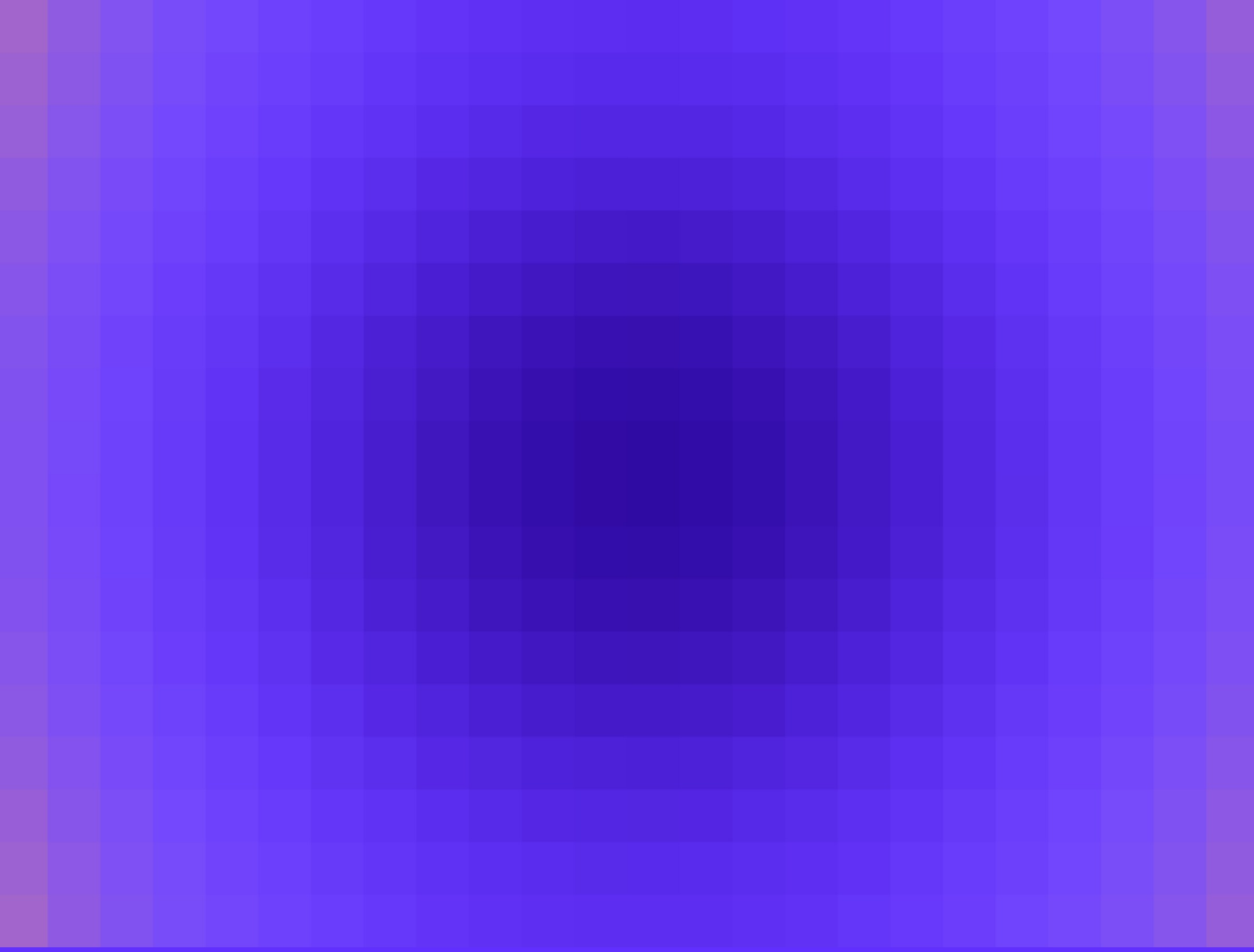


Gen Z is Unbound

A generation less tied together politically, but less divided by nationality. Findings from a survey of more than 50,000 people in the US, the UK, France and Germany.

October 2026

Electric Twin

One global culture, a thousand microcultures

Everyone wants to understand Gen Z: brands, politicians, sociologists, parents, even Gen Z themselves. The people born between 1997 and 2012 are usually described as lost, anxious, cautious and more focused on education and career than the generations before.

We surveyed more than 50,000 people across the United States, the United Kingdom, France and Germany, and analysed their answers with methods borrowed from population genetics. Two things stood out.

PEOPLE SURVEYED	COUNTRIES	POLICY QUESTIONS	PLATFORMS
50k+	4	13	21

First, Gen Z is loosely bound. A young person's political positions hang together much less than an older person's: knowing one opinion tells you less about the others, and their views are less polarised on every measure we could construct.

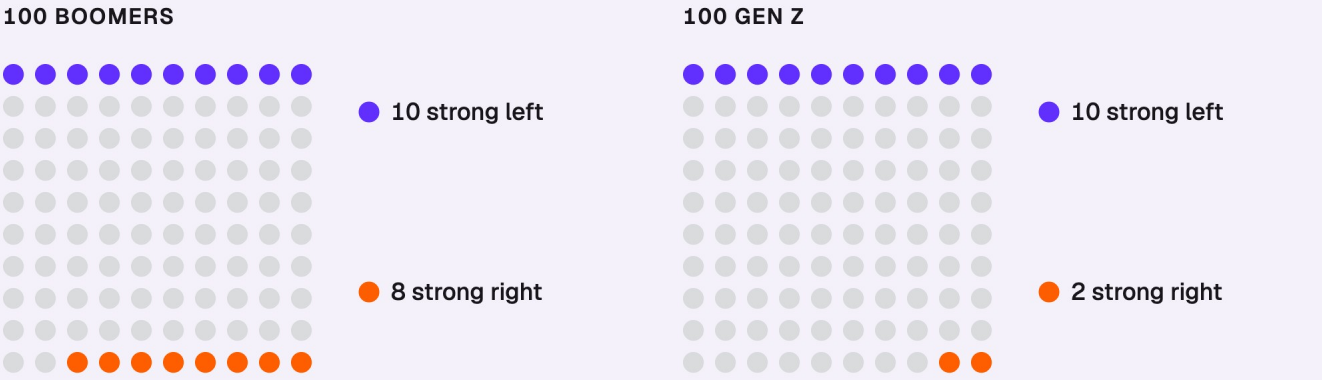
Second, Gen Z is more loosely bound by borders. Young Americans, Britons, French and Germans hold remarkably similar mixes of views. Among Boomers, national differences are about three times as large.

Eight in a hundred, and two

Ask a hundred Boomers in the US, the UK, France and Germany for their views on immigration, tax, the environment, trans athletes and the safety net, and you will find about eight who hold strong right-wing views on almost all of them. Ask a hundred of their grandchildren and you will find two.

You will find about ten committed left-wingers in each group. On the left, the generations look alike. On the right, the young sit much closer to the middle. Young people who vote for right-wing parties hold a near-even mix of left and right positions; their older counterparts lean clearly right.

Strong positions, per hundred people



Share answering strongly on one side of six or more of eight party-dividing policy items. Strong left: 10% of Boomers, 9.6% of Gen Z. Strong right: 8.4% of Boomers, 2.0% of Gen Z. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses.

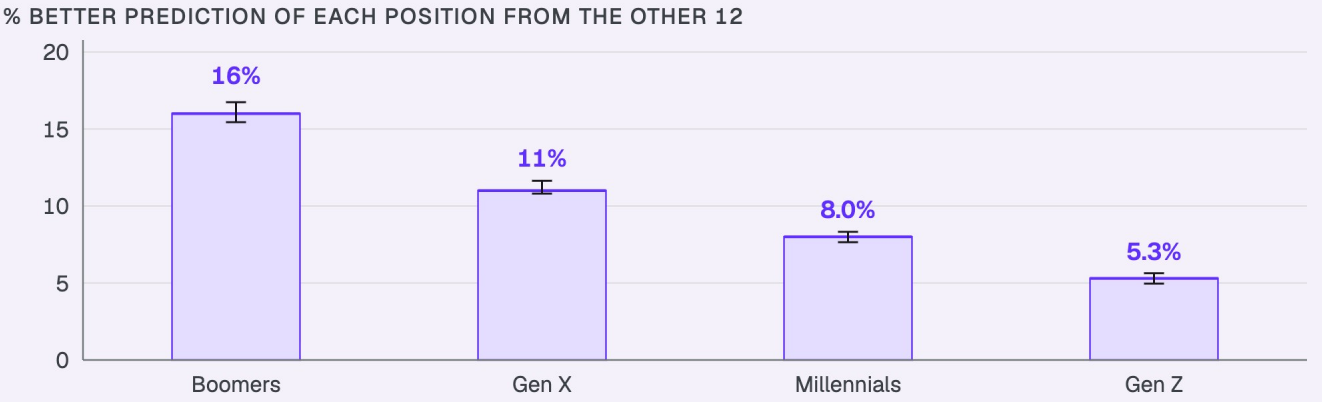
Gen Z do sit a little further left, about 8 points on average. But the left is no bigger. The right is smaller, and closer to the middle.

Less bundled

Much is written about polarisation: as trust in shared institutions falls, people retreat into two camps anchored to incompatible sources. Among the young, we find the opposite.

Start with how policy positions hang together. We asked everyone 13 policy questions, from immigration and abortion to AI and the social safety net. In a room of 100 US Boomers, 20 find someone with exactly their set of answers; among US Gen Z, 9 do. The gap remains after comparing each generation with what random combinations of the same answers would produce, so it is not simply that Gen Z split more evenly on each issue. Knowing one of a young person's positions tells you much less about the others.

Knowing one view tells you less about the rest

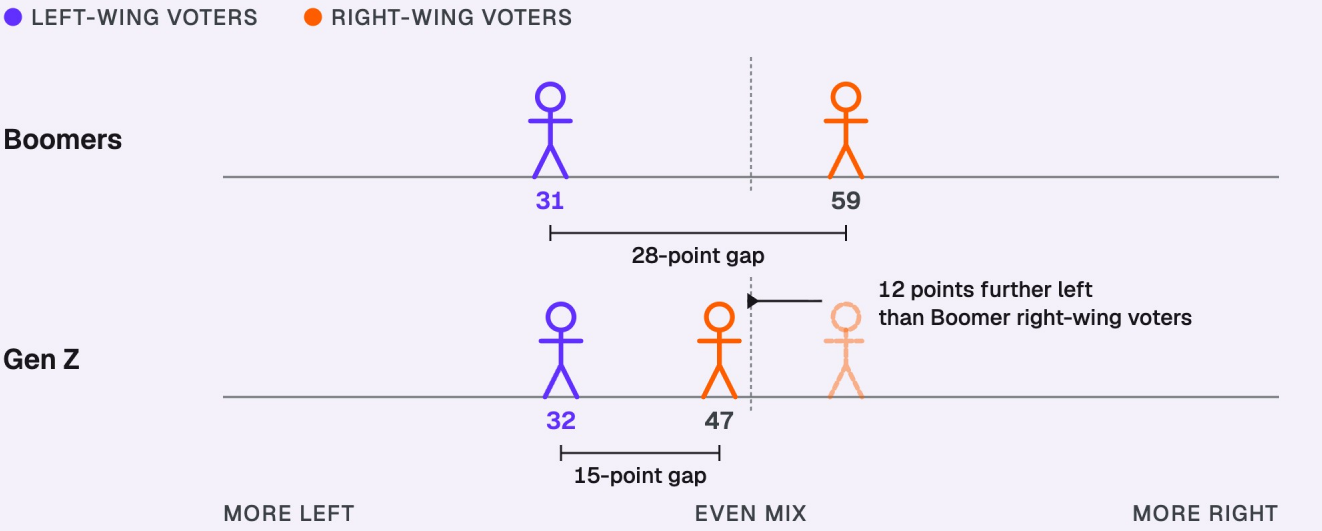


How much better each of a participant's 13 policy positions is predicted from their other 12 than from how common it is among peers, beyond what random combinations would give (0 = no connection). Equally weighted mean of four countries, both waves pooled; whiskers show 95% bootstrap intervals. It falls with each younger generation in all four countries. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses.

Less polarised, mostly on the right

Nor are young people more polarised. Score each person from 0 (every answer on the left) to 100 (every answer on the right), with 50 an even mix. Gen Z sit closer to 50 than Boomers, and beyond what random answering would produce, Boomers sit about twice as far out. Most of that difference is on the right. On average, young left-wing voters hold much the same positions as older ones. Young right-wing voters sit near an even mix, while older ones lean clearly right, so the gap between the two camps is 15 points among Gen Z against 28 among Boomers. Young right-wing voters sit clearly nearer an even mix than older ones in the US, the UK and Germany, though not clearly in France.

On average, the left matches. The right doesn't.



Average share of right-coded answers on eight party-dividing items, by national vote; mean of the four countries, both waves pooled. 50 is an even mix of left and right positions, not a political centre. Country detail in the appendix. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses in total.

Could this just be age? People are often said to move right as they get older. But left-wing voters sit in much the same place in every generation. So if age is the explanation, it hardens right-wing voters alone. We can't rule that out. That gap could be young right-wing voters who will harden later, or a cohort that never will. One snapshot can't tell the two apart.

Not a uniform left

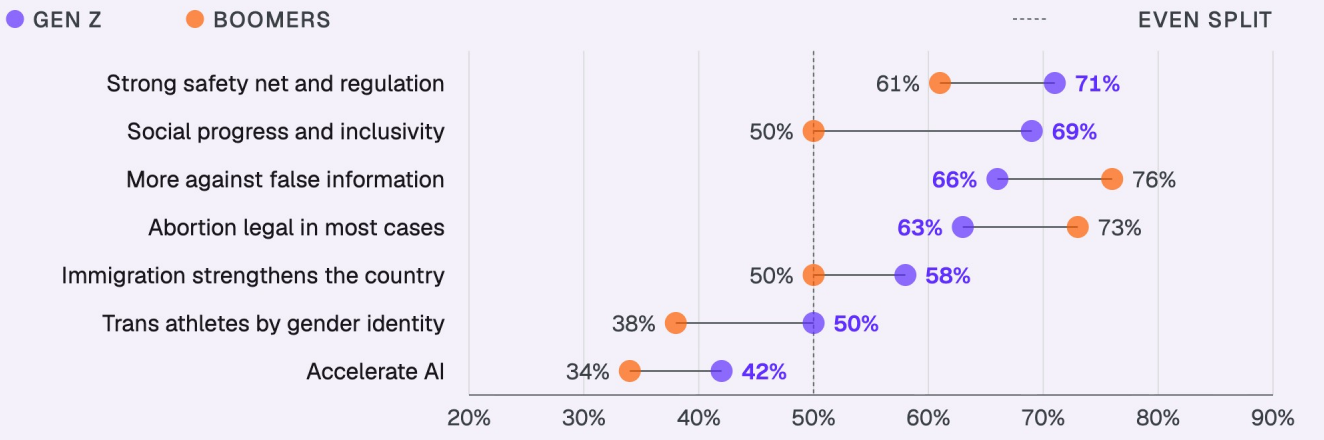
Gen Z sit to the left of Boomers, but not on everything.

On social questions they are clearly further left. 69% favour social progress over tradition (Boomers: 50%). 58% say immigration strengthens the country (50%). Half back trans athletes competing by gender identity (38%). And 71% want the government to provide a strong safety net and regulate the economy, rather than leave it to the market (61%).

On false information and AI, they are less keen than their parents on institutions stepping in, though most still favour it: two thirds want social media and the government to do more against false information (Boomers: three quarters), and 58% favour pausing or restricting AI (66%).

On 11 of the 13 questions, majorities of both generations sit on the same side. They differ in degree more than in direction.

Different in degree more than direction



% choosing each statement of a forced-choice pair. Equally weighted mean across the four countries, both waves pooled. Statement wording abbreviated. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses.

Abortion runs the other way, and needs care. People answered on a four-point scale, from strongly “legal and protected in all or most cases” to strongly “illegal or strictly limited”. 63% of Gen Z lean towards legal and protected, against 73% of Boomers. The whole gap is in Europe, and it is mostly a softening: 53% of European Boomers strongly back legal abortion, against 38% of Gen Z, while strong support for “illegal or strictly limited” rises only from 9% to 13%. In the US the generations are level (60% and 59%), and fewer young Americans strongly oppose abortion (16%, against 27% of Boomers).

One generation, four countries

If Gen Z were simply scattered, young people in different countries would scatter in different directions. They don't. On our 13 policy questions, the share of Boomers taking each side differs between the four countries by about 11 percentage points on average; among Gen Z, by about 4. Boomers hold recognisably national sets of positions. Gen Z hold much the same mix wherever they live.

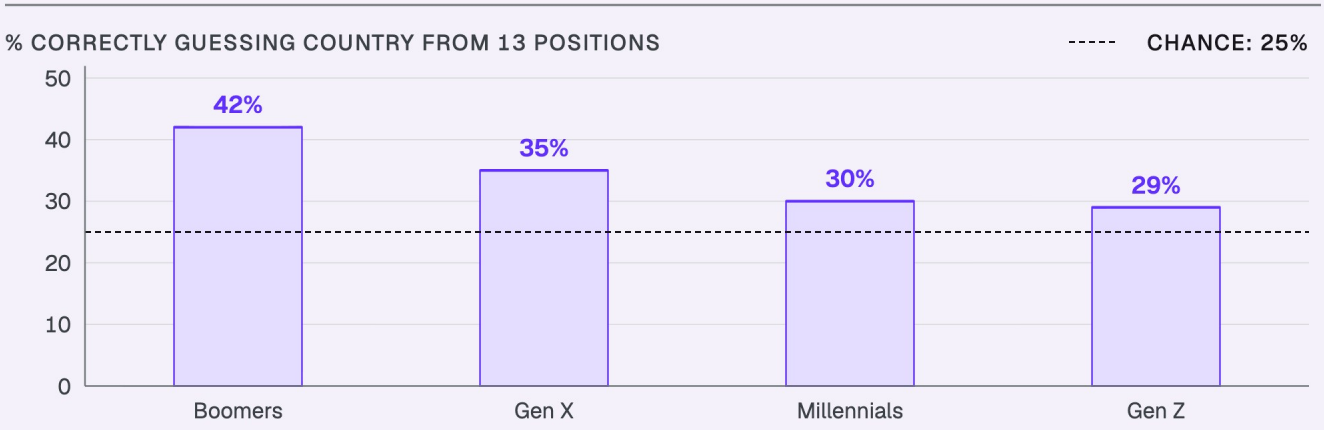
11

Points between countries per question, Boomers

vs **4**

Points between countries per question, Gen Z

Can you tell where someone lives from their politics?



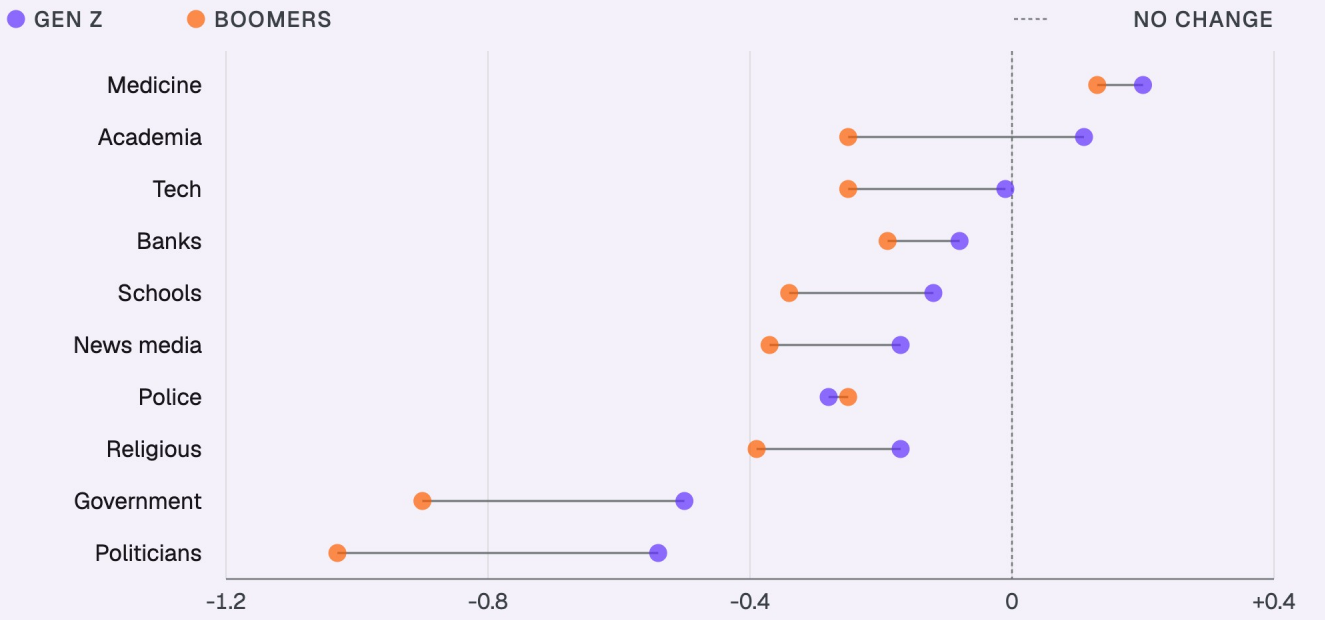
Cross-validated accuracy of a model guessing a participant's country from their 13 policy positions, countries balanced. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses.

The pattern holds for men and women separately, and when we set aside people who rushed through the survey. Among Gen Z, men and women differ more from each other than one country's young people differ from another's. For trust the convergence is weaker, but runs the same way.

What happened to trust

Asked how their trust in ten institutions has changed, every generation in every country reports a net decline. The largest reported falls are for politicians and government, and among Boomers and Gen X; Gen Z report the smallest. Very few people trust politicians completely: between 1% and 7%, depending on generation.

How people say their trust has changed



Mean self-reported change in trust, from -2 (much less) to +2 (much more), excluding “never trusted”. Participants pooled across countries and waves. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses.

These are people's own accounts of change. Over the two months between our survey waves, measured trust did not fall. What they describe is a loss of confidence that built up over years.

Trust people can check

Asked to pick the main reason they trust institutions less, the generations largely agree. About three in ten in each say institutions care only about money or power, and about as many say they aren't honest with the public. Boomers are more likely to add that institutions take political sides (21%). Those are the failings you would expect people to notice once they can see and compare what institutions do for themselves.

What holds up is trust people can check for themselves. Your own doctor is the most trusted of the 15 sources we asked about (87% trust them a lot or completely), with friends and family second (83%). Doctors and medicine are the only one of the ten institutions where people report trust rising, slightly, in every generation. Trust that rests on what people can see for themselves is holding up. Trust that rested on being people's main source of information is not.

87%

Trust their own doctor a lot or completely

83%

Trust friends and family a lot or completely

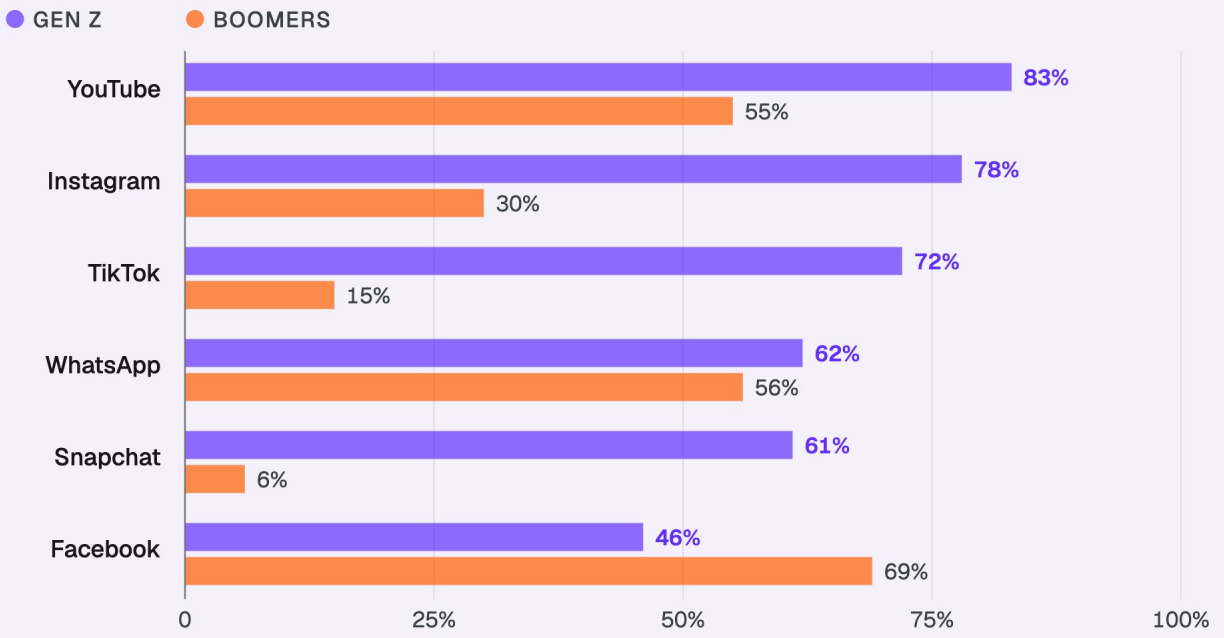
Why? The broadcast account

So much for what we found. Why it is happening is harder to show.

The most natural explanation runs through how information travels. For roughly seventy years, from network television in the 1950s to the algorithmic feed in the 2010s, culture flowed through a handful of national channels. Walter Cronkite told America what happened, and America believed him. Mass media created common knowledge at the scale of nations, and institutions built their authority on it. Positions travelled as national packages, because the channels that carried them were national.

On this account, the internet broke that. Gen Z use six platforms a week on average, twice as many as Boomers, and a third of highly online Gen Z say algorithms shape their interests, beliefs or identity a lot. If culture now reaches the young through feeds that cross borders and are cut to each person, you would expect exactly what we found: national differences shrinking, and the national packages that bundled positions together coming loose.

Where each generation spends its week

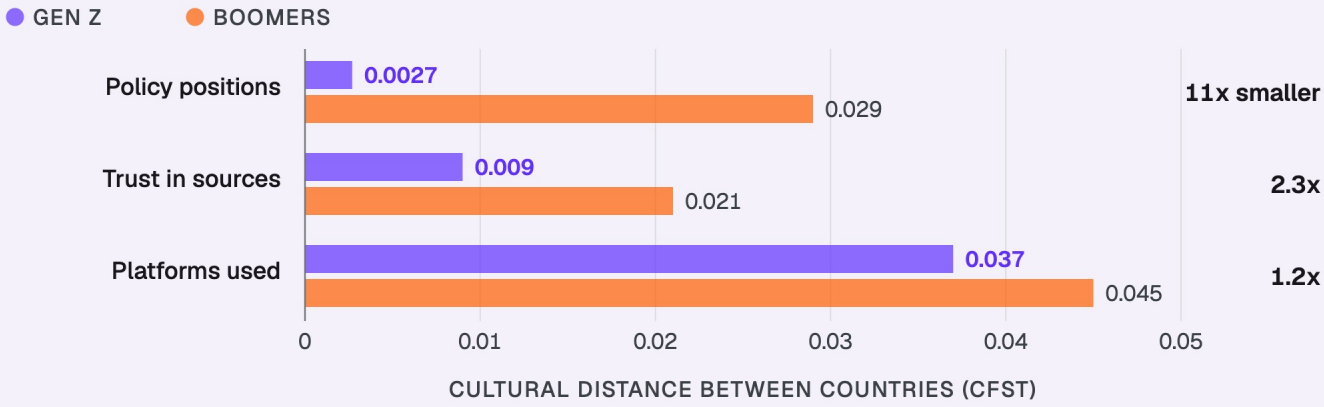


% using each platform at least weekly, equally weighted across the four countries, both waves pooled. Gen Z use 6.2 of 21 platforms on average, Boomers 3.0. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses.

Shared culture, national platforms

If the broadcast account is right, young people should share more culture across borders. They do, but not through the same platforms.

National differences shrink most in politics



Cultural distance between countries (CFST, 0 = identical answers), mean of the six country pairs, corrected for sampling noise. Labels show how many times smaller the Gen Z distance is. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses.

It isn't that young people use the same platforms everywhere: their platform mixes remain nearly as nationally distinct as older people's. What they share more is culture. Asked which celebrities most people their age would know, 46% of Gen Z's answers name someone given in all four countries, against 17% of Boomers'. The people they personally follow are still mostly national; French Gen Z, for instance, favour French YouTubers.

17%

Of Boomers' answers name a celebrity given in all four countries

e.g. Brad Pitt, Madonna, Tom Cruise

VS

46%

Of Gen Z's answers name a celebrity given in all four countries

e.g. Justin Bieber, Rihanna, Taylor Swift

Wave 2, mentions equalised across countries. Names ranked by their share in their weakest country.

This is what a shared culture looks like in practice: national platforms, but more and more of the same stars, jokes and arguments on them. Political debates may travel the same way, starting in one country and argued in all four. If so, a message that lands with young people in one country is more likely to land in the others, and a national conversation is less national than it looks.

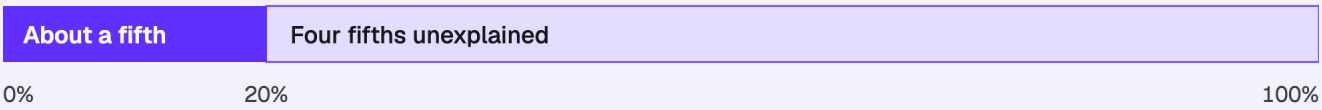
Where the data stop

How much of that can our data actually show? Some of it.

We measured what people use and how much: 21 platforms, hours online, how much they post and comment, whether they think algorithms shape them, which creators influence their politics. Together with the celebrities people follow and how they vote, these explain about a fifth of the gap in how tightly Boomers and Gen Z bundle their positions; four fifths remain unexplained. Hours online explain almost nothing, even though they vary widely: Americans in their forties report as much time online as Germans in their twenties.

What everything we measured can explain

SHARE OF THE BUNDLING GAP EXPLAINED BY ALL MEASURES, INCLUDING VOTE



Platforms used, hours online, posting and commenting, perceived algorithmic influence, online creators, celebrities followed and national vote, together: 20% of the wave-2 gap. Source: Electric Twin survey, wave 2.

What we did not measure is what people actually see inside those platforms: the posts, videos and debates in their feeds. That is where the broadcast account says the action is, and where the next study needs to look. Nor can a single snapshot separate cause from selection: the platforms people choose may reflect who they already are. So the broadcast account is our best explanation. It is not yet a finding.

What follows

If the broadcast account is right, Gen Z is not a generation with a distinctive bundle of values. It is the first cohort to grow up without a shared national information system, and its views look like what you would expect from that: less tied together within each person, less sorted by party, and more alike across borders. Unless some new channel becomes the Walter Cronkite of the feed, later cohorts may look the same.

For most of history, the culture people learned from was local. For most of the last century it was national, carried by a handful of broadcasters. For Gen Z it is online: shared across borders, but cut differently for each person. That is why the two findings belong together. The same environment that gives young people in four countries the same references also lets each of them assemble their own politics from it. We call this the Great Unbundling, and it points to a future with both a more global culture and more microcultures inside it. It may also mean that “Gen Z” doesn't exist as a group in the way “Boomers” did.

That has consequences in three directions.

01 Brands chasing “the Gen Z consumer” are chasing an average that describes few individual young people; demographic labels are a weaker guide to younger people's views than to older people's.

02 Institutions trying to rebuild trust only by improving their product risk a category error: trust never rested on quality alone, but also on their central place in a shared information system, and that place has changed.

03 Researchers and pollsters should expect generation to explain less among the young than among older people.

Expecting to be checked

When institutions lose the room, one common response is to invest more in fact-checking, moderation and clearer official messaging. How well that works depends on whether people are shaped by what they are shown, or mostly seek out content that fits what they already believe. The experimental evidence is mixed. Changing what adults saw on Facebook and Instagram for three months produced no detectable change in their political attitudes (Guess et al. 2023; Nyhan et al. 2023), but reranking feeds to show less partisan hostility did reduce how much people disliked the other side (Piccardi et al. 2025).

Both what people are shown and what they go looking for seem to matter. Campaigns that work tend to activate values people already hold. The “Don't Mess with Texas” anti-littering campaign worked by recasting littering as an insult to state pride, which crossed party, region and class. The UK's Covid-era “Stay Home, Protect the NHS, Save Lives” campaign drew in the same way on the public's regard for the NHS.

> The same technologies that dissolved centralised authority also make verification possible.

Trust at scale is more likely to be rebuilt by institutions that expect to be checked, against competing accounts, in front of an audience that can check their work. Those that organise themselves around being worthy of that scrutiny will rebuild it. Those that rely on their position alone risk losing the room.

A different room

In 1840, Tocqueville described the basic problem of a society of equals. Individuals, scattered and insignificant, cannot find each other on their own. They need a coordinating instrument, for him the newspaper, to discover that strangers think what they think. Newspapers offered opinions, but they also let people know they were not alone in holding them.

For most of the last century, that room was national. For the young, it may no longer be: their views are less tied to their own country, more shared with their peers abroad, and less divided into two camps than their parents'. Whether a room like that can support the coordination a society needs, and whether the young will sort themselves into camps as they age, are the questions the next decade will answer.

ABOUT THE RESEARCH

An online panel survey run by Electric Twin in two waves, 30 January to 6 March and 22 to 26 April 2026: 51,929 analysed responses from Gen Z to Boomers in the US, UK, France and Germany, quota-sampled on age, region and education. Cross-sectional data cannot separate age from generation.

Research by Electric Twin with Professor Michael Muthukrishna (London School of Economics and New York University).

Guess, A. M. et al. How do social media feed algorithms affect attitudes and behavior in an election campaign? Science 381 (2023).

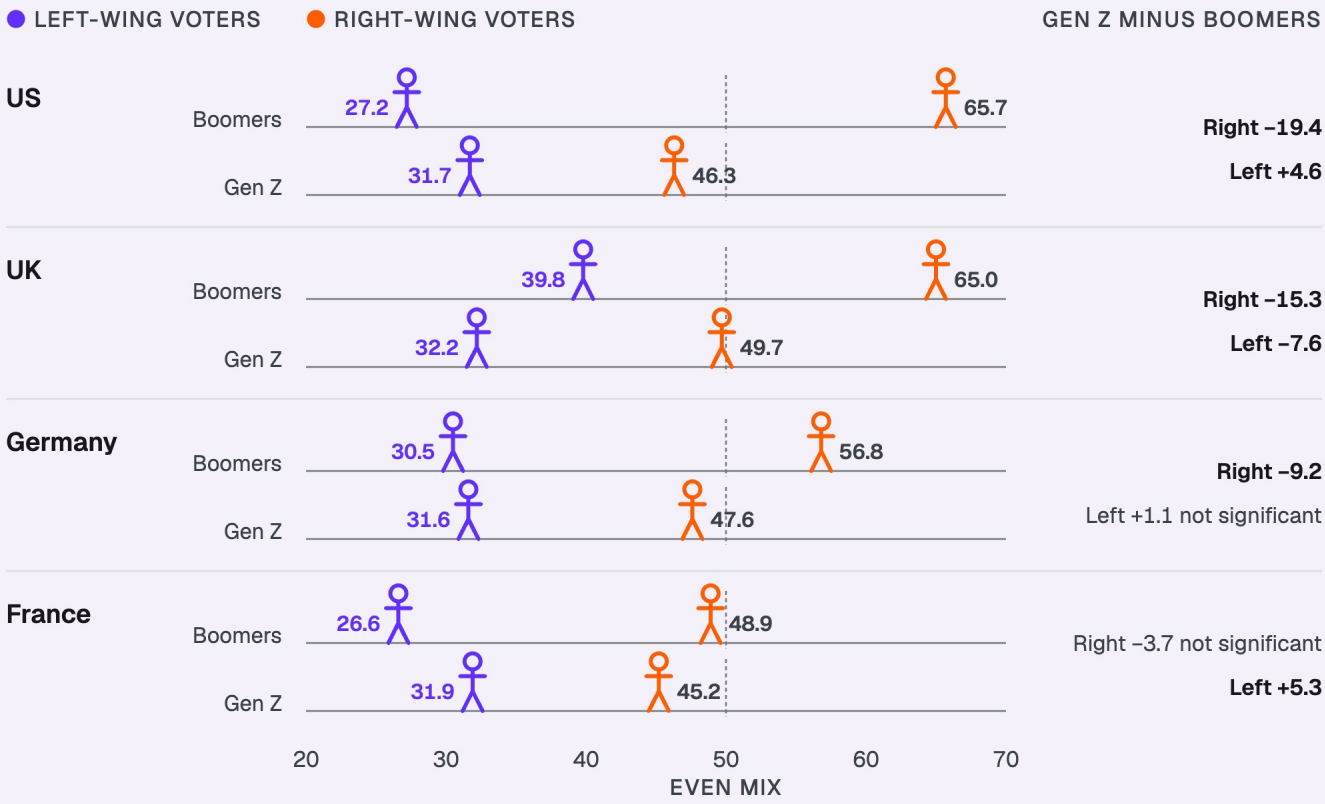
Nyhan, B. et al. Like-minded sources on Facebook are prevalent but not polarizing. Nature 620 (2023).

Piccardi, T. et al. Reranking partisan animosity in algorithmic social media feeds alters affective polarization. Science 390 (2025).

Appendix: by country

Averaging across countries cancels some differences out. Gen Z right-wing voters sit nearer an even mix than Boomer ones in the US, UK and Germany. In France, Boomer right-wing voters are already close to it. Left-wing voters differ in both directions: UK Gen Z sit further left than UK Boomers, US Gen Z less far left than US Boomers.

Left- and right-wing voters, by country



Average share of right-coded answers on eight party-dividing items, by national vote and generation, both waves pooled. Differences marked not significant have p above 0.05. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses in total.

Appendix table: by country

Average share of right-coded answers on eight party-dividing items, by national vote and generation, both waves pooled. Intervals and p-values are for the Gen Z minus Boomers difference; p-values are unadjusted.

COUNTRY	BOOMERS	GEN Z	GEN Z – BOOMERS	95% CI	P
LEFT-WING VOTERS					
US	27.2	31.7	+4.6	2.8 to 6.4	<0.001
UK	39.8	32.2	−7.6	−11.5 to −3.8	<0.001
France	26.6	31.9	+5.3	0.7 to 9.9	0.03
Germany	30.5	31.6	+1.1	−2.7 to 4.9	0.57
RIGHT-WING VOTERS					
US	65.7	46.3	−19.4	−21.6 to −17.2	<0.001
UK	65.0	49.7	−15.3	−19.7 to −10.9	<0.001
Germany	56.8	47.6	−9.2	−13.1 to −5.3	<0.001
France	48.9	45.2	−3.7	−7.7 to 0.3	0.07

Appendix: finding your match across borders

Here each person's room is filled from the same generation in another country. Each person sits in a room of 99 others, and a match is anyone with exactly the same answers to all 13 policy questions. The grey chance rate shuffles each answer within the group, so it keeps how common each answer is but not how people combine them. Intervals are 95%, from repeated subsamples of the data.

Gen Z find their match in any country's room

Boomers

PERSON \ ROOM	US	UK	France	Germany
US	**19.8** chance 3.2	**13.3** chance 3.4	**14.3** chance 2.2	**13.7** chance 2.5
UK	**11.2** chance 3.5	**17.4** chance 5.8	**9.2** chance 2.6	**8.8** chance 3.1
France	**15.7** chance 2.2	**12.9** chance 2.5	**17.3** chance 3.2	**16.7** chance 2.6
Germany	**12.1** chance 2.4	**9.9** chance 3.0	**13.4** chance 2.7	**15.2** chance 3.1

Gen Z

PERSON \ ROOM	US	UK	France	Germany
US	**8.6** chance 2.2	**9.1** chance 2.4	**8.0** chance 2.1	**7.4** chance 2.0
UK	**8.5** chance 2.4	**9.6** chance 2.7	**7.4** chance 2.3	**6.7** chance 2.2
France	**7.8** chance 2.1	**7.8** chance 2.4	**7.8** chance 2.2	**7.7** chance 2.0
Germany	**7.2** chance 2.0	**7.1** chance 2.2	**7.7** chance 2.1	**7.8** chance 2.2

% of people (rows) who find someone with exactly their 13 policy answers in a room of 99 drawn from each country's same generation (columns). Outlined: own country. Both waves pooled, survey-weighted. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses.

GENERATION	OWN COUNTRY	ANOTHER COUNTRY	ALL FOUR TOGETHER	LOST ABROAD (95% CI)
Gen Z	8.5 2.3	7.7 2.2	8.0 2.2	9% (3 to 15)
Millennials	9.4 2.1	8.5 2.0	8.9 2.0	10% (4 to 15)
Gen X	12.3 2.5	10.2 2.3	11.0 2.3	17% (13 to 22)
Boomers	17.5 3.9	12.6 2.7	14.7 2.9	28% (24 to 32)

In another country's room, Boomers lose 28% of their matches and Gen Z 9% (difference 19 points, 95% CI 12 to 26). The Boomer loss is about individual questions rather than combinations. Chance falls abroad by the same proportion (3.9 at home, 2.7 abroad), so Boomers match at 4.6 times chance in both. Boomers in each country lean differently on single questions, while Gen Z lean much the same way everywhere. Every whole-generation room matches above chance, at 2.8 to 7.2 times the chance rate (144 rooms).

Appendix: finding your match across generations

Here the room is filled from another generation in the person's own country. Reading along a row shows what happens as the room gets older or younger. Matches, chance and intervals are defined as on the previous page.

Gen Z match in every generation's room; Boomers don't

PERSON	ROOM OF 99 FROM Gen Z	Millennials	Gen X	Boomers
Gen Z	**8.5** ±0.8 · chance 2.4	**8.4** ±0.5 · chance 2.1	**8.7** ±0.5 · chance 2.2	**8.8** ±0.5 · chance 2.0
Millennials	**8.8** ±0.4 · chance 2.1	**9.4** ±0.7 · chance 2.0	**10.0** ±0.4 · chance 2.2	**10.6** ±0.4 · chance 2.2
Gen X	**9.6** ±0.5 · chance 2.2	**10.6** ±0.4 · chance 2.2	**12.2** ±0.7 · chance 2.7	**13.6** ±0.6 · chance 2.9
Boomers	**10.3** ±0.6 · chance 2.1	**11.9** ±0.6 · chance 2.2	**14.5** ±0.7 · chance 3.0	**17.6** ±0.9 · chance 3.7

% of people (rows) who find someone with exactly their 13 policy answers in a room of 99 from each generation (columns), same country; mean of the four countries. Outlined: own generation. Second line: 95% interval and chance. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses.

Gen Z find a match among Boomers about as often as among each other (8.8 against 8.5; difference +0.4, 95% CI −0.2 to 0.9). Boomers lose 42% of their matches in a room of Gen Z (95% CI 38 to 45). So the combinations of views young people hold also exist among older people, but many older combinations are rare among the young.

Observed ÷ chance for each room, unweighted on both sides. Values above 1 mean people's answers fall into shared combinations more often than answer shares alone would produce.

PERSON ↓ / ROOM →	GEN Z	MILLENNIALS	GEN X	BOOMERS
Gen Z	3.5	3.9	4.0	4.3
Millennials	4.1	4.6	4.5	4.8
Gen X	4.4	4.8	4.6	4.7
Boomers	4.9	5.4	4.9	4.8

Appendix: finding your match across the left-right divide

Here the room holds only people who voted for a left- or right-wing party. Vote was asked in both waves in the US but only in the second wave in Europe, so these rooms are smaller and the intervals wider. Matches, chance and intervals are defined as on page 17.

Young right-wing voters rarely share a set of views

PERSON	ROOM OF 99 FROM			
	Boomer left	Boomer right	Gen Z left	Gen Z right
Boomer left	**26.7** ±3.1 · chance 11.1	**12.3** ±2.3 · chance 2.0	**18.3** ±2.2 · chance 4.8	**7.8** ±2.0 · chance 2.2
Boomer right	**9.7** ±1.7 · chance 2.1	**18.1** ±2.2 · chance 5.3	**5.5** ±1.1 · chance 1.1	**6.5** ±1.2 · chance 1.5
Gen Z left	**13.9** ±1.8 · chance 4.4	**6.5** ±1.4 · chance 1.0	**12.4** ±1.7 · chance 3.3	**6.3** ±1.4 · chance 1.8
Gen Z right	**4.7** ±1.3 · chance 2.0	**4.8** ±1.0 · chance 1.5	**4.0** ±0.9 · chance 1.7	**3.6** ±1.3 · chance 1.5

% of voters (rows) who find someone with exactly their 13 policy answers in a room of 99 voters from each group (columns), same country; mean of the four countries. Outlined: own group. Second line: 95% interval and chance. Source: Electric Twin survey, US, UK, France and Germany, two waves (January to April 2026), 51,929 responses.

VOTERS	OWN GROUP (95% CI)	CHANCE	OBSERVED ÷ CHANCE	OWN GROUP, OTHER COUNTRY
Boomer left	26.7 (23.6 to 29.7)	11.1	2.4	19.5 (16.7 to 22.3)
Boomer right	18.1 (15.9 to 20.4)	5.3	3.5	12.4 (10.5 to 14.4)
Gen Z left	12.4 (10.7 to 14.1)	3.3	3.7	11.5 (10.0 to 13.1)
Gen Z right	3.6 (2.3 to 4.9)	1.5	2.6	3.1 (2.1 to 4.1)

Young right-wing voters find a match among each other 3.6% of the time, against 18.1% for Boomer right-wing voters (difference 14.5 points, 95% CI 12.2 to 16.9) and 12.4% for young left-wing voters. They are about as likely to find one among young left-wing voters (+0.4 points, 95% CI −0.8 to 1.6) or Boomer right-wing voters (+1.2, 95% CI −0.1 to 2.5). They still match each other above chance (2.6 times). Of the 10 voter rooms below twice chance, 9 involve UK young right-wing voters, the smallest young group (203 people). Young right-wing voters have their vote in common, but few of them share a full set of positions.