



2026
Moonbug Entertainment

The Next State of Parenthood

MOONBUG

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Legend

A color guide for charts and graphs

MILLENNIALS

GEN Z

PARENTS

MILLENNIAL MOMS

GEN Z MOMS

MOMS

MILLENNIAL DADS

GEN Z DADS

DADS



Two Generations. Two Operating Systems. One New Playbook for Reaching Modern Families.

Something Has Shifted Inside the American Family. And We're Only Beginning to Understand It.



Last year, the inaugural *State of Parenthood* study introduced a simple but powerful truth: modern parents don't feel seen. Not by media, not by brands, and often not by the systems designed to support them. That work reframed parenting as something more complex than routines and responsibilities. It revealed the emotional weight, the constant trade-offs, and the quiet pressure shaping everyday decisions.

This year, we went deeper. If 2025 identified the tension, 2026 begins to map its structure.

We built this study expecting to refine the narrative around generational change. The assumption was straightforward: Gen Z parents were entering the picture with new digital behaviors, new expectations, and a fundamentally different playbook for how to reach them. The data challenged that.

Instead of one evolving audience, we found two fundamentally different systems operating side by side.

Millennials are not in transition. They are optimized. They have built structured approaches to parenting, defined philosophies, integrated tools, and a high degree of confidence in the inputs they trust.

Gen Z, by contrast, is still forming its system. More selective, more private, and often parenting in reaction to how they were raised, they are not rejecting guidance, but they are far more intentional about what they allow in. They research less frequently, but when decisions matter, particularly those tied to their child, they go deeper than any other group.



The shift is easiest to see this way:

Millennials are refining a system they've already built. Gen Z is still deciding what that system should be.

But the most important evolution from last year's study is this: the generational divide is only part of the story.

When layered with gender, four distinct parenting realities emerge, each with its own emotional pressures, trust filters, and decision-making pathways. These differences are not subtle. They fundamentally change how parents navigate their lives, their households, and the brands they engage with.

And all of this is happening under increasing pressure.

In August 2024, the U.S. Surgeon General identified parental stress as a public health crisis, with 48% of parents reporting that their stress feels overwhelming most days, nearly double the rate of non-parents.¹ Childcare costs now consume 20% of household income on average, nearly triple what is considered affordable, while 70% of Americans say raising children has become too expensive.² These pressures are not isolated. They are systemic, and they shape every decision parents make.³

Against this backdrop, last year's insight becomes even more important:

When parents don't feel seen, they don't just disengage emotionally; they change how they choose.

This report builds on that foundation by mapping modern parents across three critical dimensions: how their households operate, how they process emotional and social pressures, and how those factors translate into trust, behavior, and purchase decisions.

What emerges is a landscape of overlapping systems rather than a single, unified experience.

It draws on a nationally representative survey of 1,000 U.S. parents ages 18-45 with at least one child under 10, fielded in March 2026, alongside qualitative interviews that bring these dynamics to life in their own words.

For brands, the question is no longer how to reach parents. It is knowing which parent you are trying to reach.

Millennials Named Their Philosophy. Gen Z Is Still Figuring Out What to Call Theirs.

Most parents are not standing around playgrounds introducing themselves as "gentle parents" or "free-range families." That's not how parenting shows up in real life.

What they talk about instead is what just happened that morning. The meltdown. The negotiation. The moment they lost patience or tried not to.

But when you step back from those moments, patterns start to emerge.

Millennials are more likely to organize their parenting around a defined approach, even if they don't say it out loud every day.



38%

of millennials identify with gentle parenting

compared to

31%

of Gen Z⁴

21%

of millennials align with crunchy parenting

15%

of Gen Z⁵

26%

identify with free-range parenting

23%

of Gen Z⁶

26%

identify with authoritative parenting

25%

of Gen Z⁷

These parents may not lead with the label in conversation, but they have a structure behind their decisions. A system they can point to.

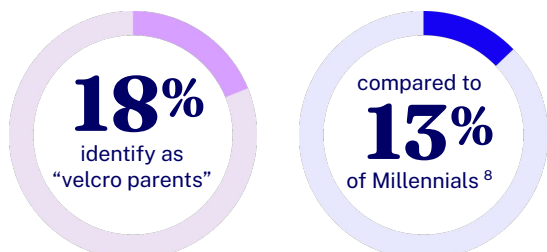
⁴ Gentle parenting (focus on empathy, communication, and emotional validation)

⁵ Crunchy parenting (health-conscious, holistic, and sustainability-focused lifestyle)

⁶ Free-range parenting (encouraging independence and self-directed play)

⁷ Authoritative (clear boundaries paired with warmth and responsiveness)

Gen Z is more likely to describe their parenting in terms of proximity and responsiveness.



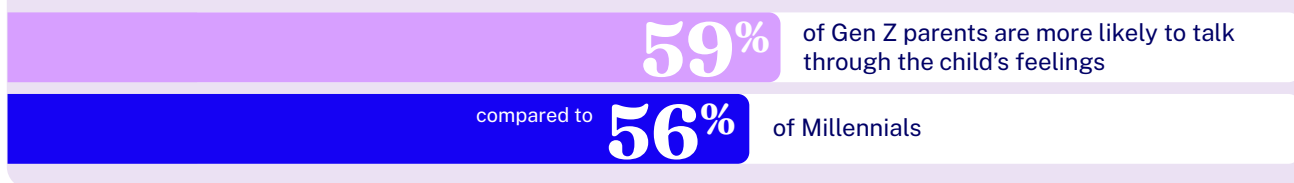
Part of that difference may reflect life stage. Younger children often require more hands-on parenting. But it also reflects something broader. Gen Z is significantly more likely to say none of the listed parenting philosophies fully describe them at all.

They recognize the language. They have seen gentle parenting across TikTok and social media. But in real life, especially in unpredictable or high-pressure moments, those labels often become less rigid.

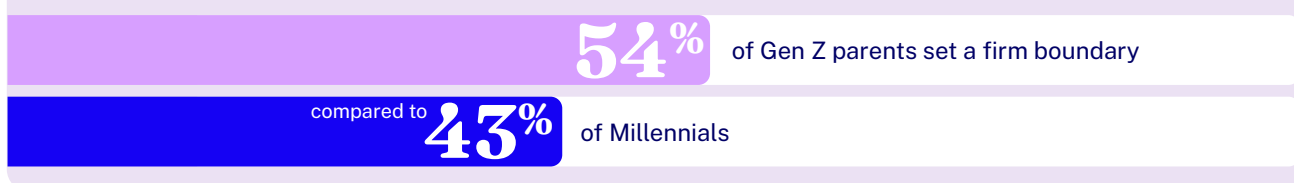
You can see that in how Gen Z responds across different parenting scenarios:



When a child's toy breaks



When a child hits another child



When a child struggles with an independent task



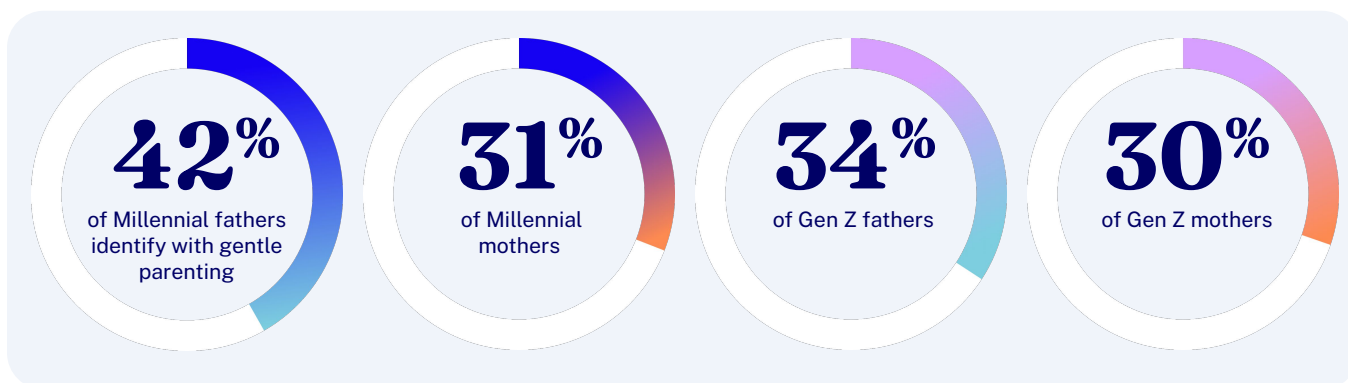
Three moments, three different responses from the same parent.

Millennials are more likely to build around a defined system. Gen Z is more likely to adapt in real time.

But inside that broader pattern, one group stands out in a way many people may not expect.



Millennial dads are the most likely of any parent group to anchor themselves to a clear parenting philosophy.

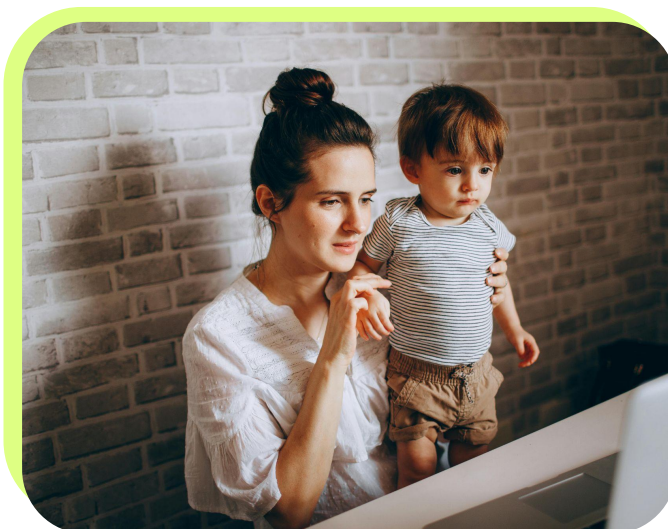
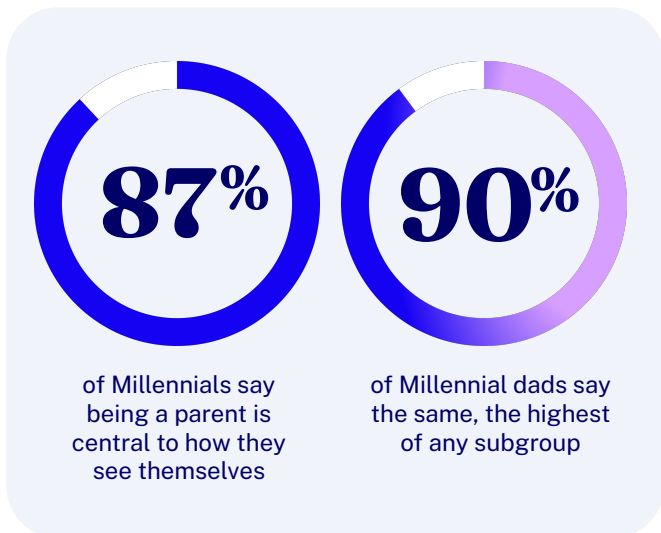


This is more than just fathers being more involved than previous generations.

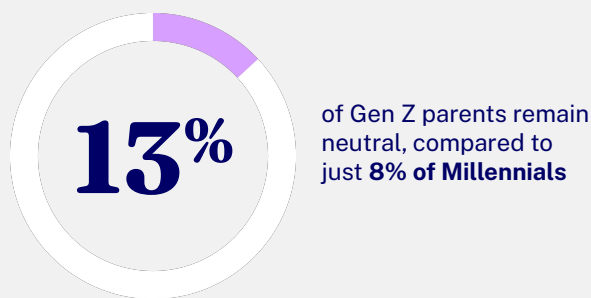
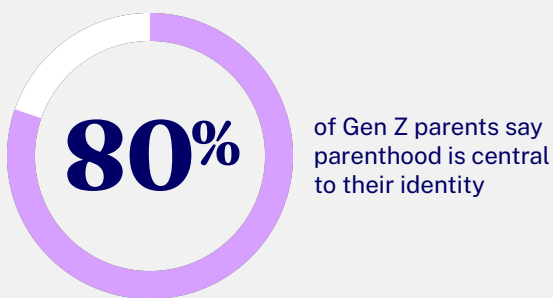
A significant share of Millennial dads have actively embraced an empathy-first framework and built it into how they see themselves as parents.

For Millennials, Parenthood Is Core to Identity.
Gen Z Leaves More Room Around It.

Both generations love their children completely. They just carry parenthood differently inside their sense of self.



Gen Z parents still place enormous importance on parenthood, but often with more distance around it.



That 13% neutrality shows up in how settled parents feel in their role. **Millennials are more likely to define themselves through parenting. Gen Z is more likely to see it as one part of a broader identity.**

Both generations feel confident in their daily parenting decisions. The majority of each group rates themselves at 8 or higher on a 10-point scale, and both land at the same peak.

But Gen Z shows more variation underneath that ceiling, more parents who feel generally capable but less certain in specific moments.

The difference is not whether either generation cares deeply about parenting. It is how tightly parenting becomes tied to identity, structure, and self-definition.

Underneath these parenting differences is a larger question many parents are quietly working through: what parts of how they were raised still belong in their own household, and what parts do not.

One Generation Is Extending Their Parents' Legacy. The Other Is Rewriting It.

Every parent carries something forward from how they were raised. The question is how much of it they keep.

For many Millennials, parenting feels more like inheritance. Their parents got enough right that they are building on an existing foundation.

44%

of Millennials say they parent in a very similar way to how they were raised.

Gen Z sees something different in the mirror. For them, parenting is more often an active process of correction.

20%

of Gen Z parents say they have developed a parenting approach that is quite different from how they were raised

Combined, roughly one in three Gen Z parents are not simply adjusting inherited patterns. They are actively trying to rewrite them.

12%

of Gen Z parents say they are intentionally parenting in the opposite way



But changing how you parent does not always mean disconnecting from where you came from. Many parents are actively reworking certain patterns while still holding onto the values, traditions, or cultural foundations that shaped them.

"I just want to be there for him, the way that my father wasn't."

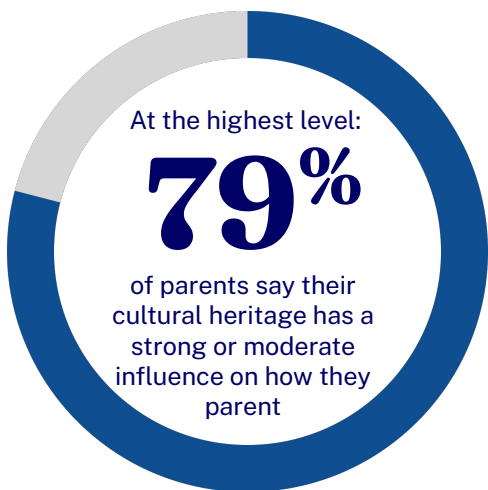
(Male, 25-29)

"I grew up as a people pleaser. My parents put a lot of focus on what are other people gonna think. The smartest kid, the most polite kid, fit into this little cookie-cutter. With my son, we're trying to break that cycle."

(Female, 25-29)

But that average masks very different realities underneath.

Heritage still plays a role, but how it shows up depends heavily on both generation and race.



For Millennial parents, heritage tends to act as a foundation.

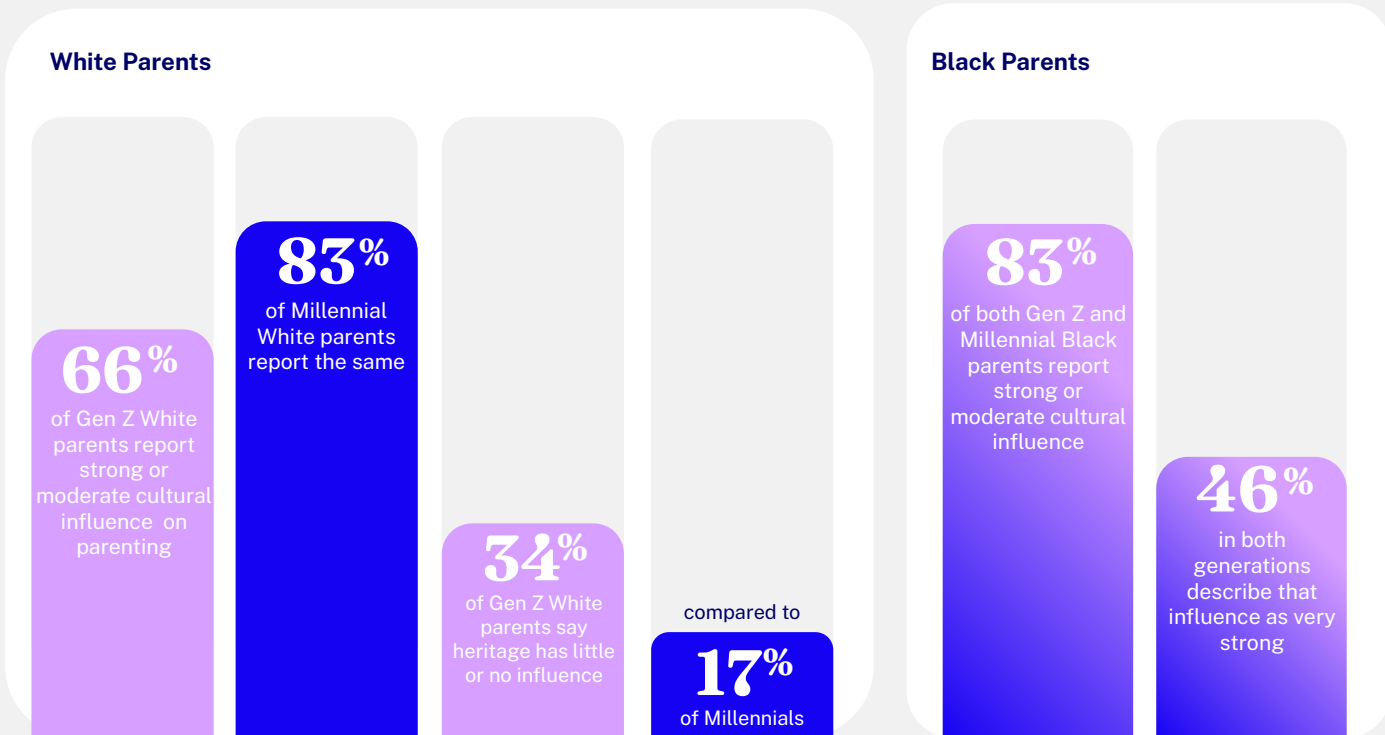
They are more likely to carry forward what they were given, reinforcing the idea of continuity across generations.

Gen Z parents, while still shaped by culture and family background, tend to approach that influence more selectively.

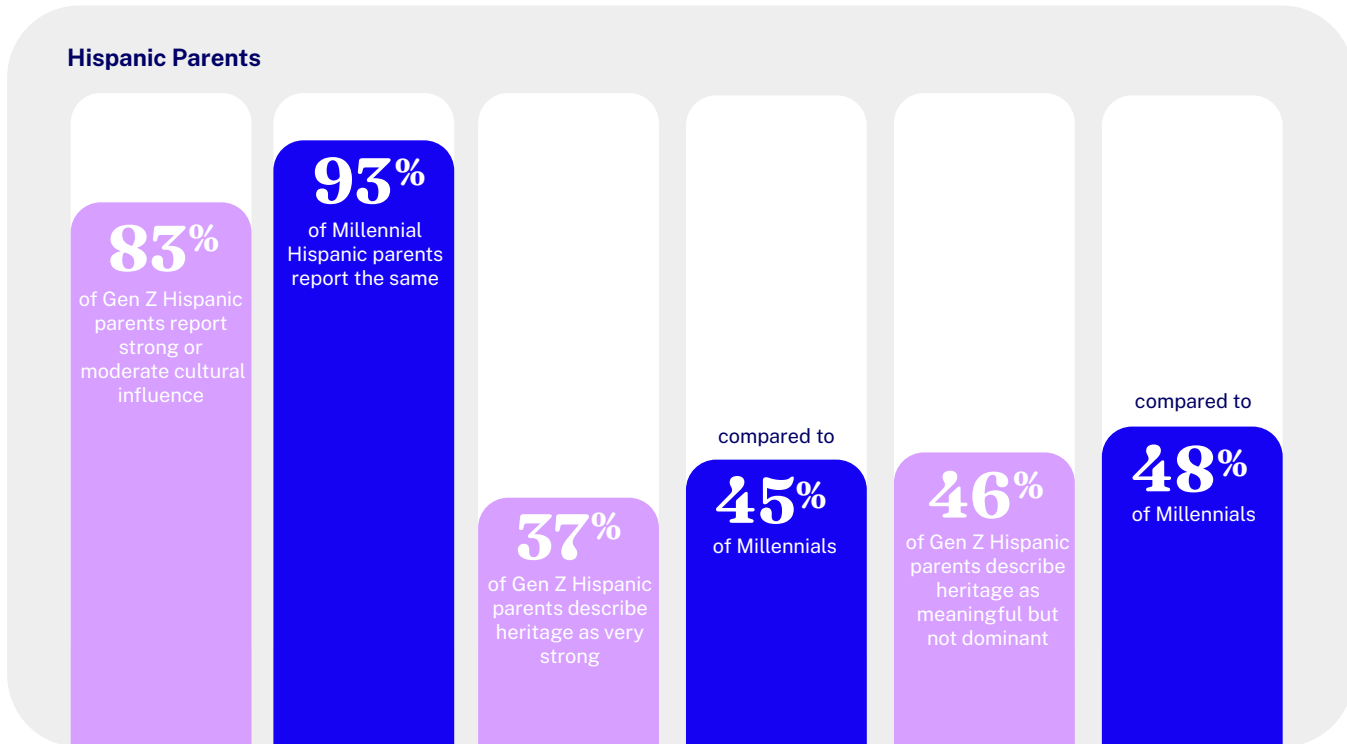
And that broader pattern shows up differently across racial and ethnic groups.

Among White parents, Gen Z is more likely to take an individualistic approach, with heritage playing a less defining role.

Among Black families, heritage remains deeply stable across generations, with nearly identical levels of strong cultural influence.



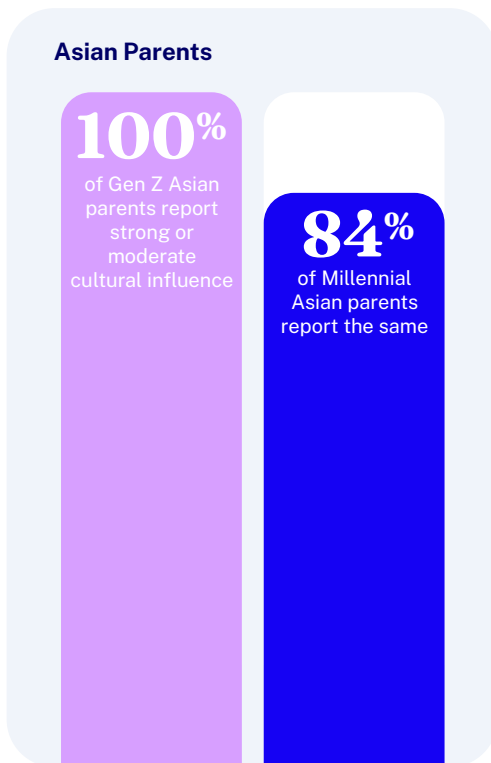
Hispanic parents continue to report high levels of cultural influence overall, though Gen Z Hispanics are slightly less likely to describe that influence as dominant.



Among Asian parents, heritage remains especially strong across both generations, with little indication that influence is fading.⁹



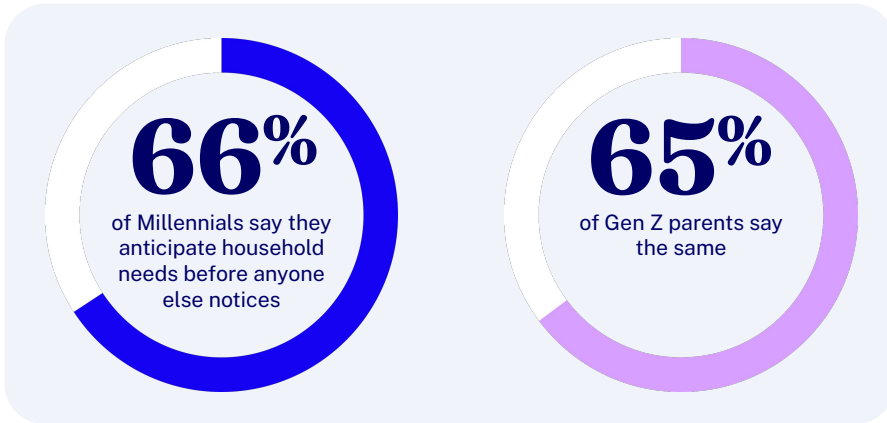
Across groups, heritage continues to influence parenting in meaningful ways. What changes is how directly it shapes everyday decisions and household structure.



In some households, heritage remains a central framework for how children are raised. In others, it operates more in the background, informing decisions without fully determining them.

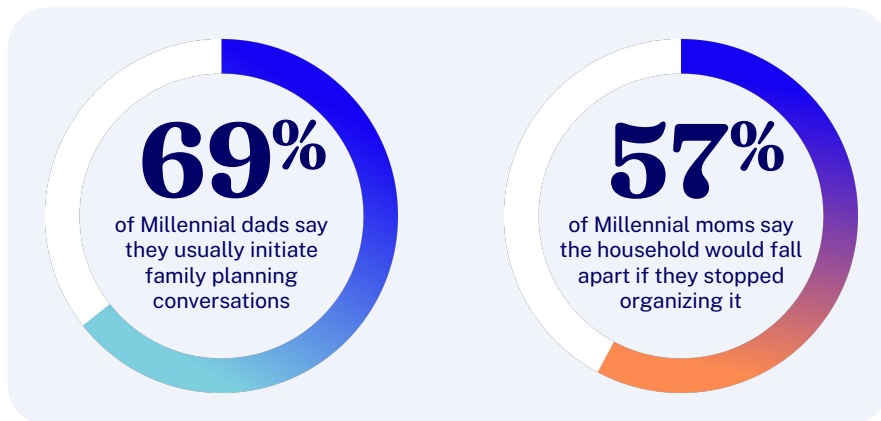
Everyone Sees the Problem. Not Everyone Owns It.

The mental work of scanning ahead, anticipating needs, and noticing what might fall through the cracks is broadly shared across generations.

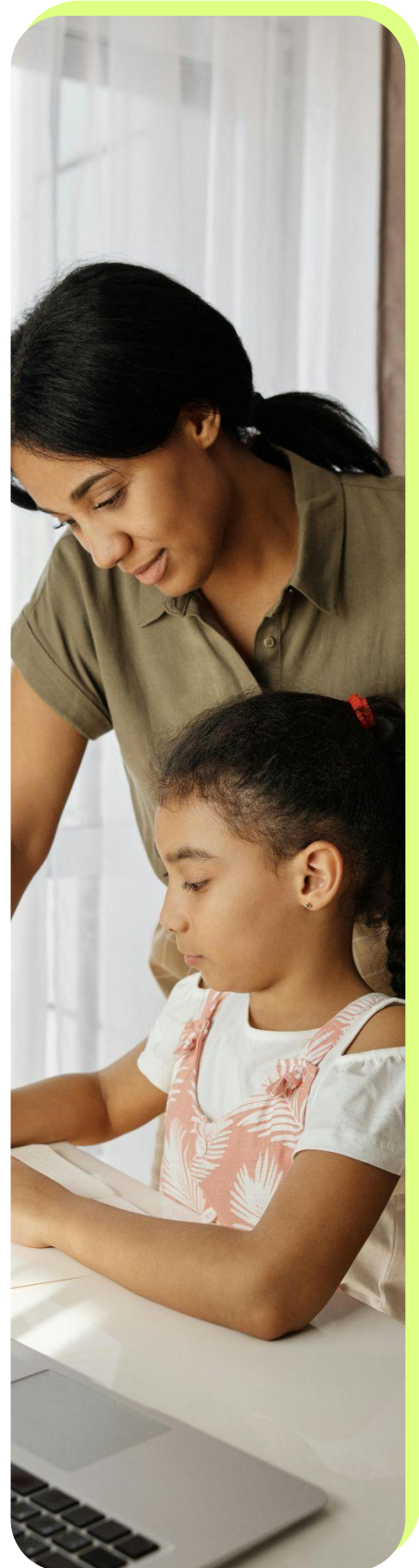
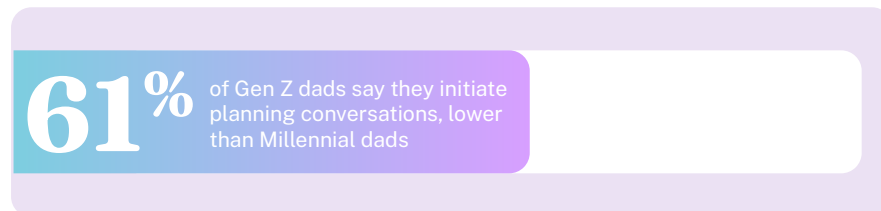


But noticing the problem and carrying the responsibility for making sure it gets handled are not always the same thing.

In Millennial households, dads are more likely to describe themselves as the drivers of family planning. Moms are more likely to describe themselves as the ones holding the entire system together.



Gen Z shows signs of somewhat more shared planning dynamics.





But even in more collaborative systems, not all forms of planning carry the same weight.

Starting the conversation about summer camp is one kind of contribution.

Tracking the deadlines, filling out the forms, packing the lunch, managing the logistics, and making sure nothing falls through the cracks is another.

Both may technically count as planning. But one is often carrying far more of the invisible work.

And that difference helps explain why shared responsibility on paper does not always feel equally shared in practice.

"It's always this non-stop mental thinking about making sure she's safe, healthy. Even not being with her, you think about her."

(Female, 30-34)

"If you have time to lean, you have time to clean. It's just an all-hands-on-deck collective effort."

(Male, 40-45)

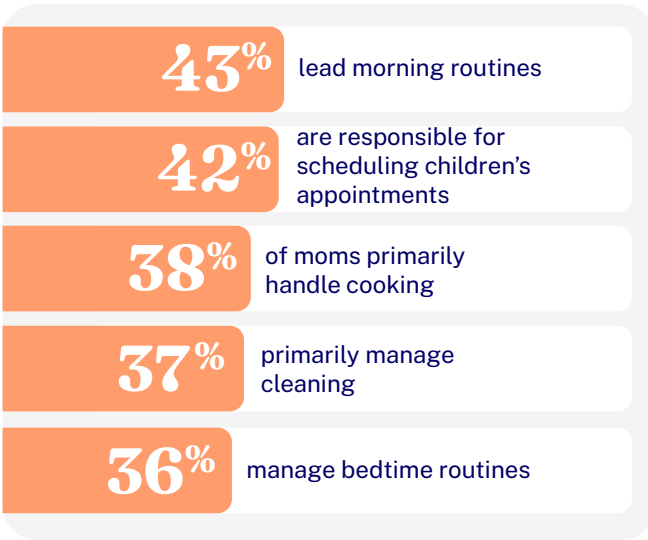
The Labels Have Changed. The Daily Division Has Not.

Despite the equal-partnership ideals both generations often share, the actual division of daily labor still follows a pattern that feels strikingly familiar.

And it looks nearly identical whether the parents are 25 or 40.

Women continue to dominate the tasks that happen every day and cannot easily be deferred.

Men are more likely to dominate responsibilities that are periodic, structured, or easier to schedule in advance



But the visible division of labor is only part of how a household actually functions.

Someone is still tracking what the family needs. Deciding what matters enough to spend money on. Determining what gets researched, bought, replaced, restocked, or prioritized.

And that responsibility does not always sit with the person doing the most visible work.

"As a stay-at-home mom, I feel like it's my obligation. I'll do everything to the best of my ability. Sometimes I don't trust my husband."

(Female, 30-34)

"Dirty diaper, it wasn't even a question. If I'm with her, I'm just gonna go and change her. The other guys were like, hey, baby's dirty, go change her, that's your responsibility."

(Male, 30-34)

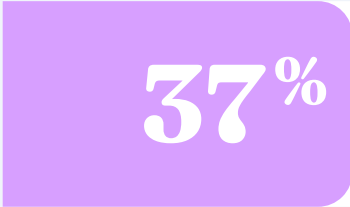
Gen Z Dads Are Co-Managing the Household in Ways Their Fathers Never Did.

In Millennial households, purchasing responsibility is more likely to sit with one person.



of Millennial households say one person typically makes household essential purchase decisions independently

Gen Z households often look different.



of Gen Z dads say they regularly decide together with another adult on household purchases, the highest collaborative rate of any subgroup.

They are more likely to be in the cereal aisle together. Comparing options. Sharing the mental load. Deciding in partnership rather than through fixed ownership.

That shift reflects something larger.

This generation of fathers is starting from a more hands-on baseline and building toward shared responsibility, rather than negotiating for occasional participation within older household structures.

Previous research has shown that younger fathers often want to be deeply involved, but may feel treated as secondary parents.

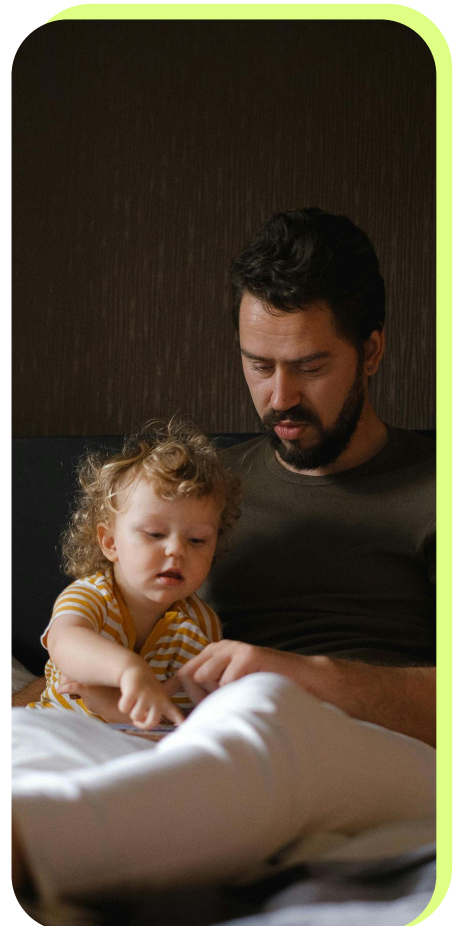
Gen Z dads in this study appear to be moving beyond that barrier.

They are not waiting to be included. They are already participating more directly in how the household operates.

But even in households where responsibilities feel more shared, the workload rarely stays contained to just two people for long.

"My objective is to be around my son as much as possible. It's not to not be around him. I love being around my son."

(Male, 25-29)

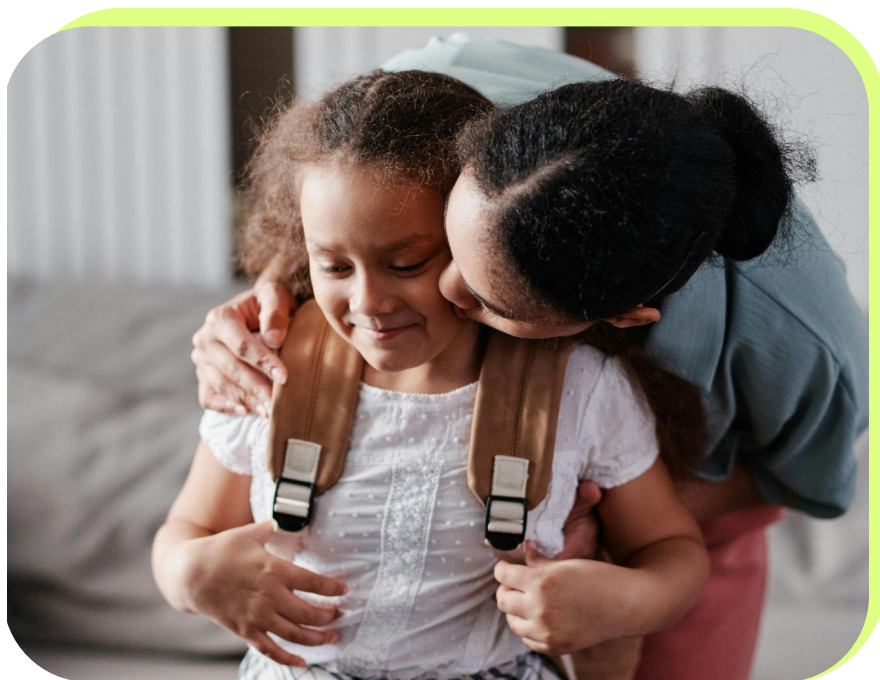
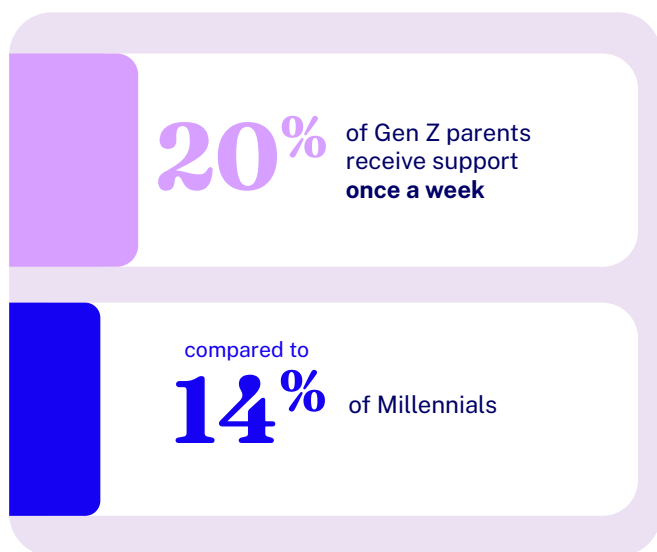
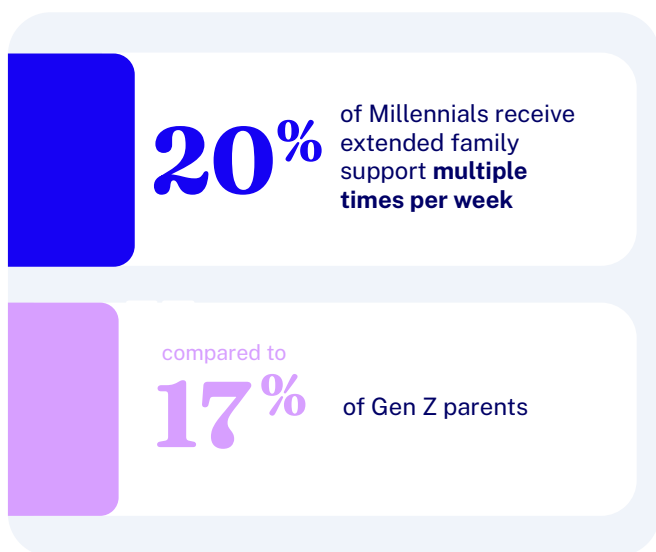


The Village Still Exists. But It Shows Up Differently.

The village has not disappeared. But the structure of that support looks different depending on generation.

Millennials are more likely to have help built into the rhythm of the week.

Gen Z parents are more likely to experience support in a more episodic, on-call pattern.



That difference matters.

When support is predictable, some of the pressure can be absorbed before it escalates.

When support is more intermittent, more of that burden stays concentrated inside the household.

And for many parents, that pressure does not disappear when the day ends. It simply follows them into the quieter moments.

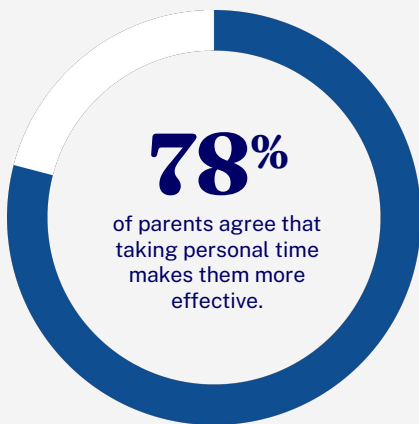
Parents Believe in Rest. They Just Cannot Stop Feeling Guilty About Taking It.

It is 9:15 on a Tuesday night. The kids are finally asleep. There is a window, maybe an hour, before exhaustion wins.

And instead of resting, the checklist starts running:

*Should I prep tomorrow's lunch?
Did I respond to that email from the teacher?
Is it selfish to sit here when the laundry is still in the dryer?*

Parents understand the value of rest intellectually. They understand the tradeoff. A rested parent is a better parent.



But emotionally, the reality feels far more complicated.



The struggle is not usually with the concept of self-care. It is with what self-care feels like in practice.

For many parents, the internal dialogue sounds familiar:

*"I should be more patient than this."
"Everyone else figured this out already."
"If I stop, everything stops."*



Millennials have a more settled relationship with this tension. Gen Z has not fully arrived there yet.

82% of Millennials say personal time makes them more effective parents

compared to **73%** of Gen Z parents

79% of Millennials say they actively take turns with their partner to create personal time

compared to **73%** of Gen Z parents

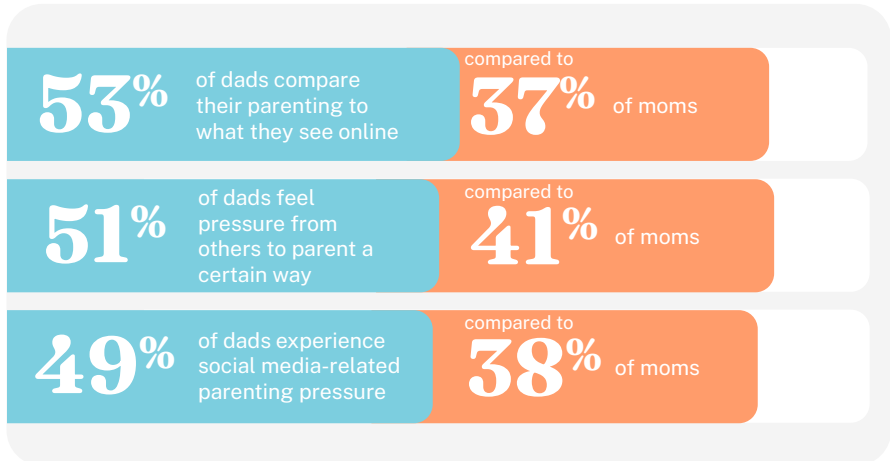
Across many measures, Gen Z are not rejecting self-care. But they are often still negotiating with it. Still deciding whether they are truly allowed to claim it without guilt.

The Pressure Conversation Has Been About Moms for Years. The Data Says Dads Are Carrying More.

For years, "mom guilt" has been the cultural shorthand for parenting pressure. It is real.

But it is not the full picture.

Across every measure of external pressure, dads report higher levels than moms, and that pattern holds across both generations.



This shift did not happen in isolation. Modern fathers are significantly more involved than previous generations, spending more time, taking on more visible roles, and operating under far greater scrutiny.

More time. More responsibility. More comparison.

And the cultural environment surrounding parenting has only intensified that pressure.

Every scroll can feel like another benchmark. The perfect bedtime routine. The calm discipline moment. The father who somehow always seems patient, present, and fully optimized.

Meanwhile, real dads are often navigating the same chaos, self-doubt, and exhaustion as everyone else, but without the same long-standing cultural language to process it.

Moms have had decades of social vocabulary around burnout, overload, and guilt.

Dads are increasingly feeling those same pressures, often without equivalent support systems or narratives that acknowledge it.

And yet much of the marketing aimed at fathers still leans heavily toward performance, achievement, or aspiration.

Very little says: "You are doing enough."

For a generation of dads carrying more pressure than many people realize, that reassurance may be far more powerful than another reminder to do more.

"I feel guilty that I'm going out with friends to the bar and leaving the kids. Am I being irresponsible? I got kids now."

(Male, 25-29)



Dads Feel Watched. Moms Feel Worn Down.

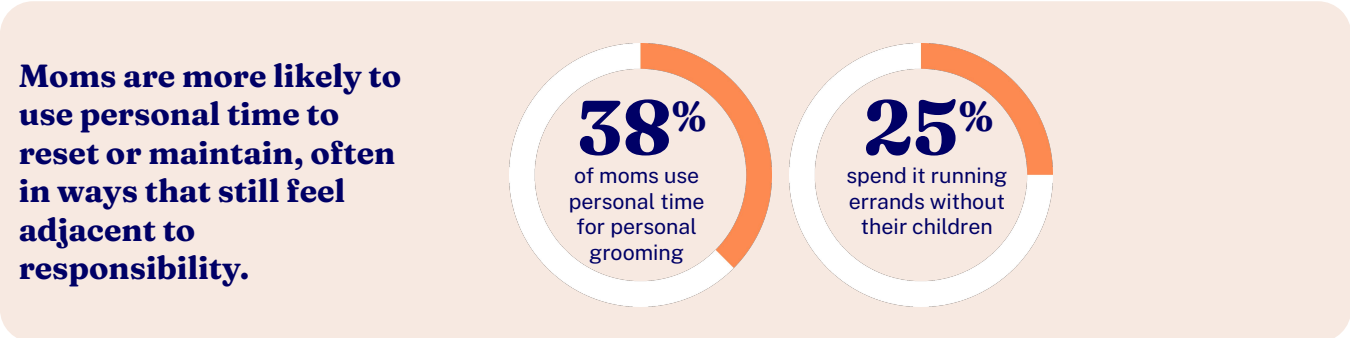
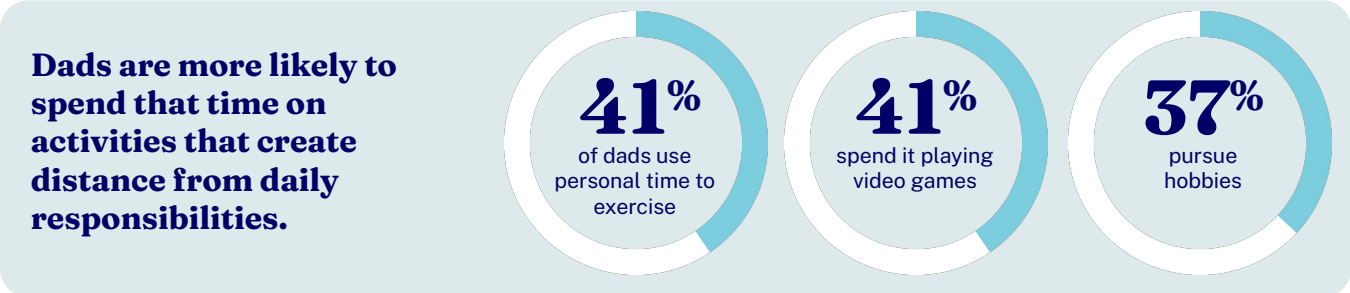
Much of that pressure centers on whether they feel like they are measuring up.

Dads are more likely to report feeling evaluated. Their pressure often centers on performance, comparison, and whether they are measuring up.

Moms, by contrast, are more likely to experience pressure as sustained depletion. Less about how they are being judged, and more about how rarely they fully get to step away.

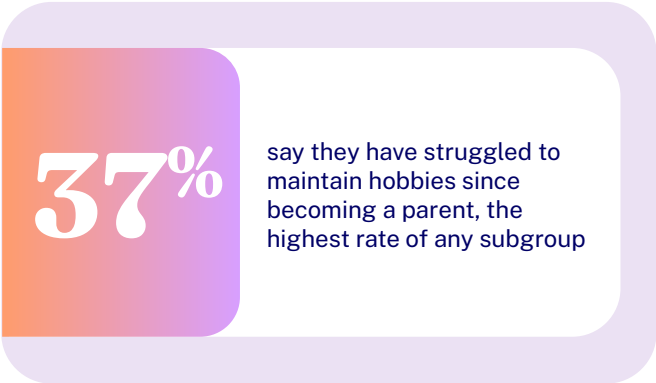


Even when personal time does exist, it often functions differently across genders.

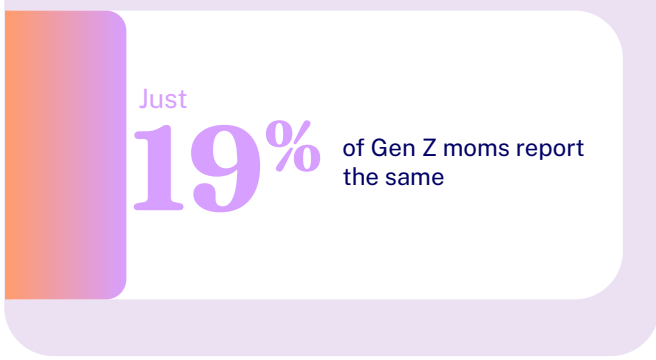
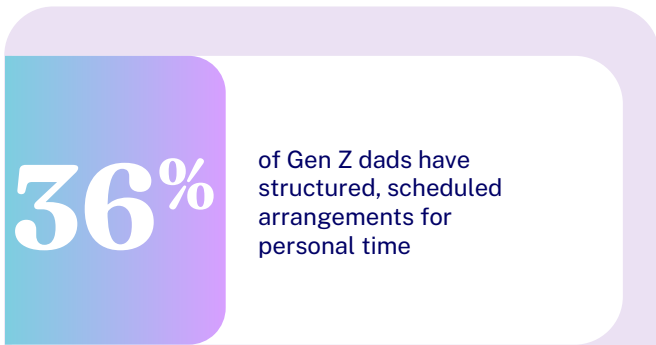


The time may technically belong to them, but it often still revolves around maintaining the household around them.

That strain appears especially strongly among Gen Z moms.



And the divide becomes even more visible when personal time is something that has to be intentionally scheduled rather than taken whenever it appears.



One is built into the calendar. The other often depends on whether space happens to appear.

One is protected time.
The other is borrowed time.

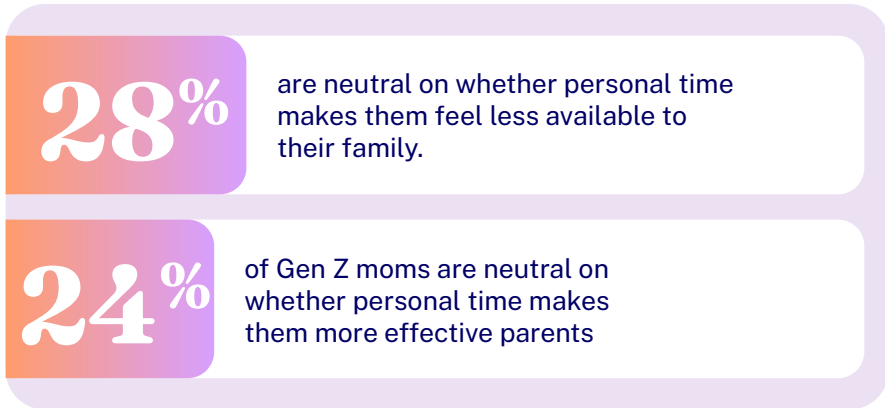


Gen Z Moms Carry the Quietest Weight. And They Have the Least Support.

Not every form of pressure is loud.

For Gen Z moms, it often shows up less as overt burnout and more as uncertainty.

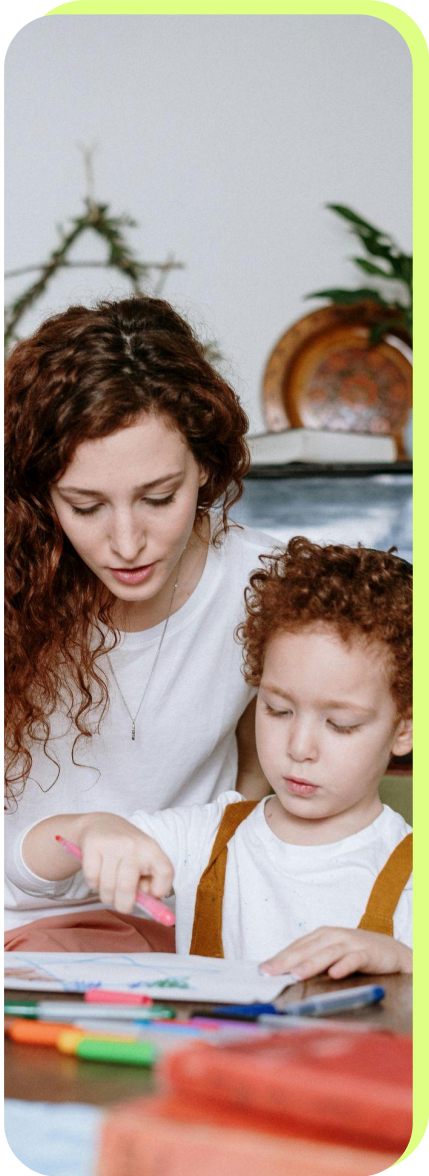
They are less likely than other groups to strongly agree or disagree across key measures, and more likely to remain in the middle.



Where other parent groups often express conviction, Gen Z moms are more likely to express ambivalence.

That uncertainty extends beyond mindset into structure.

- She has:
- The least scheduled personal time
 - The lowest ability to maintain hobbies
 - The highest rate of saying her partner does not actively take turns giving her space



And if you asked her how she is doing, she may not necessarily describe herself as overwhelmed.

It may sound more like:

**"I don't know if I've earned a break yet."
 "Nobody is offering. So I'm probably fine."
 "This is just what it is right now."**

Compared to other parent groups, Gen Z moms are often navigating these pressures with fewer built-in systems, less consistency, and less structural support.

The question is not whether she needs a break.
 It is whether she truly feels allowed to take one.

When “Equal” Does Not Feel Equal.

He initiates the planning conversations.
She tracks the follow-through.

He has scheduled time for himself.
She is waiting for a gap to open up.

He feels the pressure of being watched.
She feels the weight of holding it together.

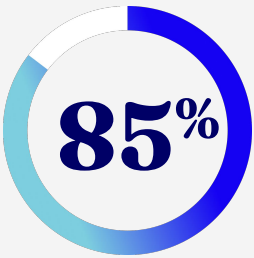


Both parents often believe they are contributing fairly. But perceptions of how household responsibilities are divided remain sharply different.

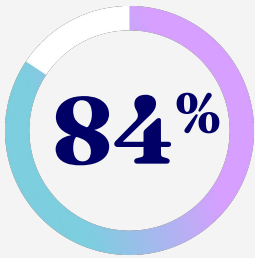
85% of dads are satisfied with how household responsibilities are divided

Just **65%** of moms say the same

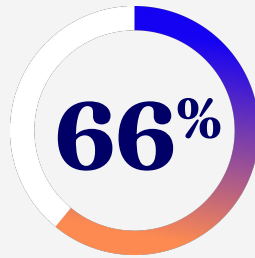
By subgroup:



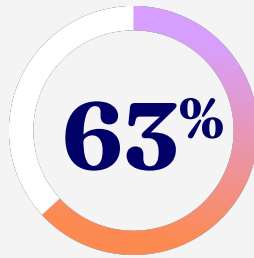
of Millennial dads are satisfied



of Gen Z dads are satisfied



of Millennial moms are satisfied



of Gen Z moms are satisfied



The generation changes. The gap does not.

This is not necessarily a disagreement about what is happening inside the household. It is more often a difference in how fairness is being measured.

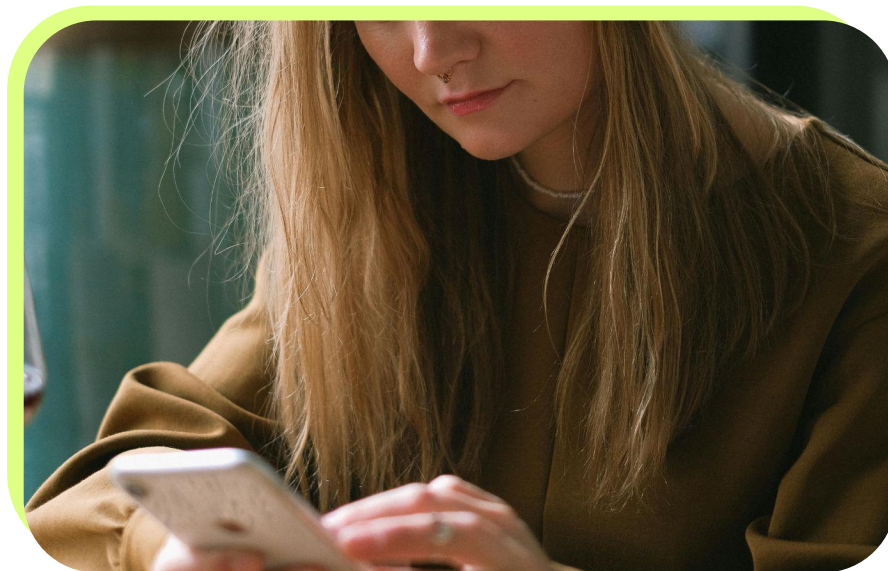
A dad who handles bedtime several nights a week and initiates planning conversations may genuinely see himself as an equal partner.

A mom managing the daily routines, school logistics, appointments, emotional labor, and invisible follow-through may be working from a very different baseline.

The Platform Most Embedded in Parents' Daily Lives Is Still YouTube

TikTok gets the headlines.
Linear still gets the spend.
Both matter.

But when you look at where parents actually show up every day, one platform leads by a wide margin: YouTube.

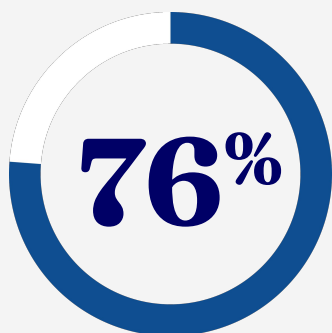


YouTube

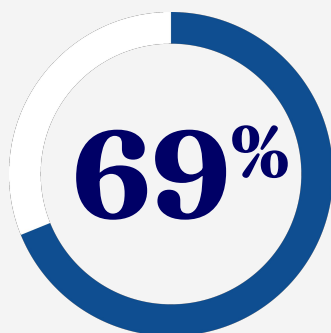
facebook

Instagram

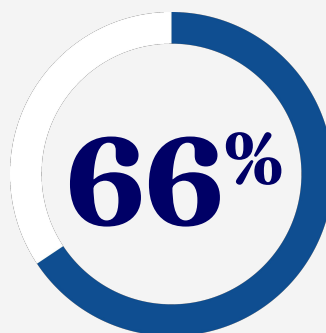
TikTok



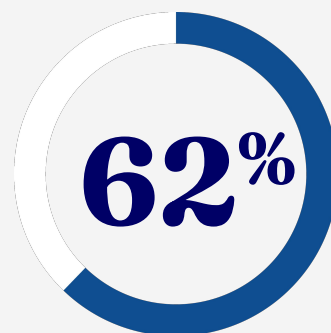
of parents use YouTube daily or more often



use Facebook daily



use Instagram daily

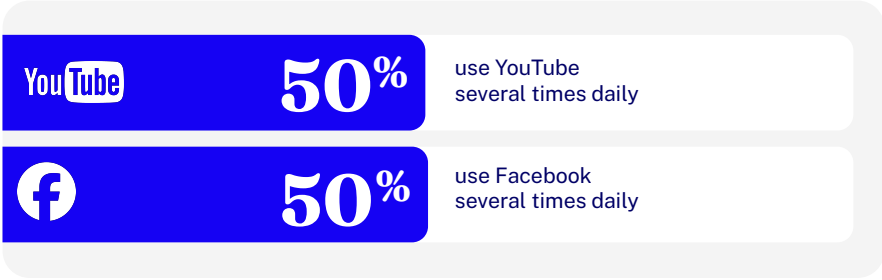


use TikTok daily

A Millennial dad researching car seats at 11pm. A Gen Z mom scrolling “day in the life” content while nursing at 3am. A toddler watching YouTube while dinner gets made nearby.

YouTube is not just another platform. It is deeply woven into modern family life.

Millennials, in particular, are still highly active across both YouTube and more traditional social platforms like Facebook.



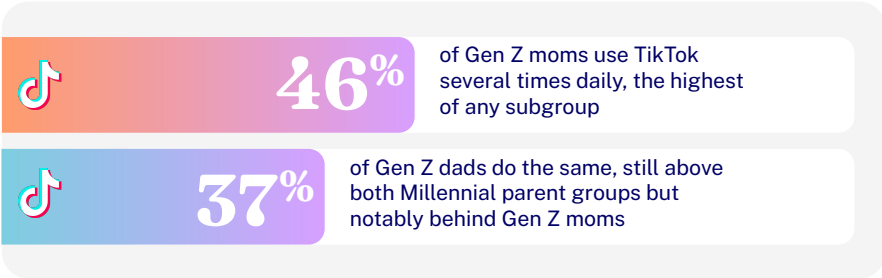
And despite how often industry narratives frame Millennials and Gen Z parents as fundamentally different digital consumers, the overall platform divide is narrower than many assume.



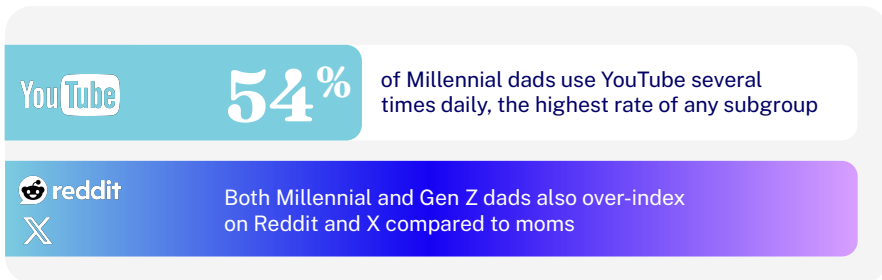
That 8-point gap is meaningful, but it does not represent two entirely separate media worlds. Both generations are highly digital, highly social, and deeply platform-dependent in their daily parenting routines.

The sharper differences often emerge within generations rather than between them.

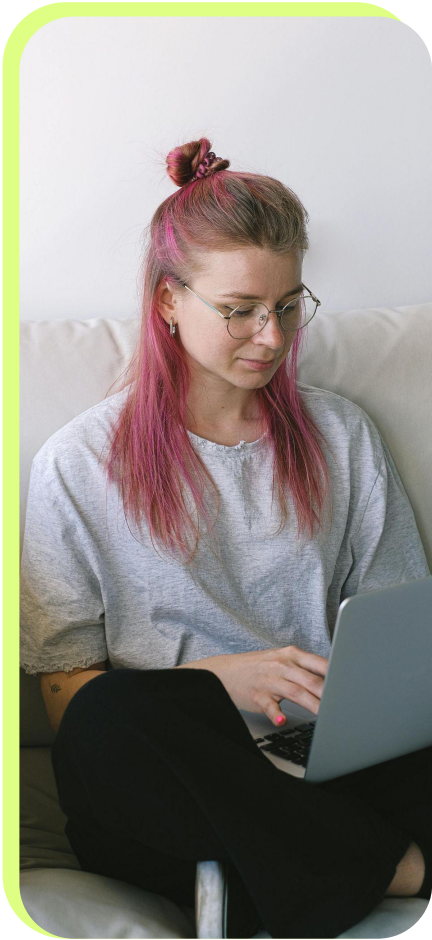
TikTok is more Gen Z than mom-specific, but Gen Z moms are clearly its heaviest power users.



Meanwhile, when platforms center around research, discussion, or information-seeking, dads consistently over-index regardless of age.



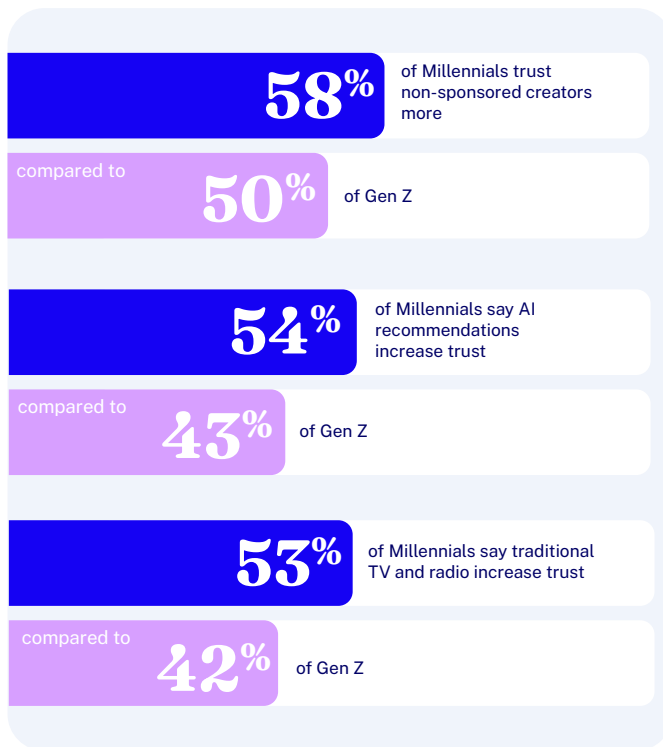
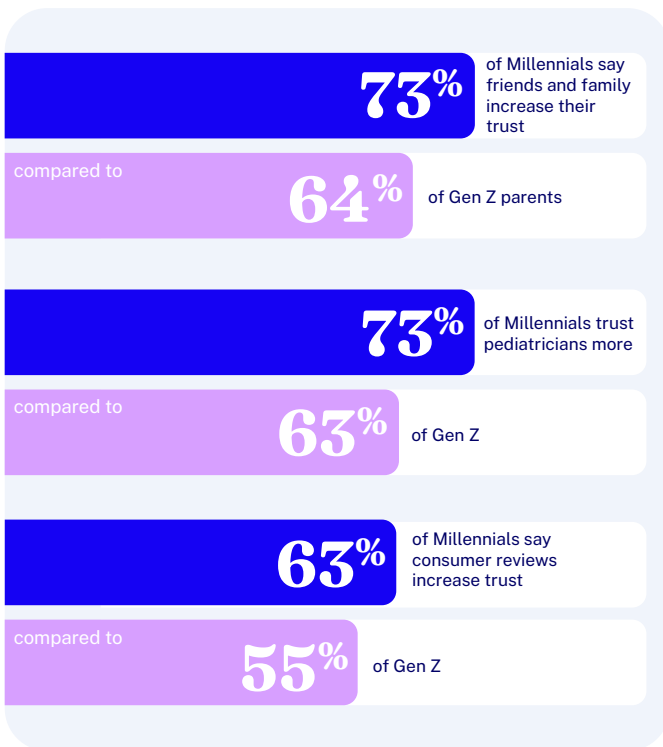
But presence alone does not equal trust.



Millennials Let More Sources In. Gen Z Makes Each One Prove Itself.

Across every source, the pattern is consistent. Millennial parents are more likely to say a source increases their trust. Gen Z is more likely to remain neutral or skeptical.

That trust gap becomes especially visible in traditional channels, where Gen Z is far more likely to say TV, radio, and print have little or no influence at all.



Millennials are not trusting blindly. But they are generally more receptive across human, institutional, digital, and traditional sources. Gen Z, by contrast, requires more proof before extending that same trust. And increasingly, one of the places where parents are deciding who and what to trust is creator content itself.

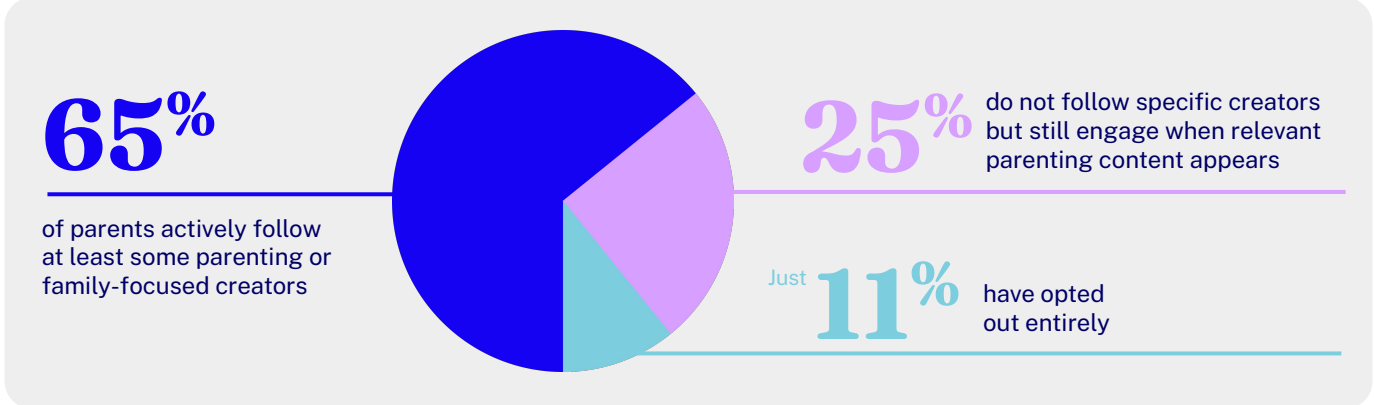
"Don't use staged, perfect families in ads. Show the actual chaos of daily life so it feels relatable. If your product solves a problem or saves time, just say it clearly."

(Male, 40-45)



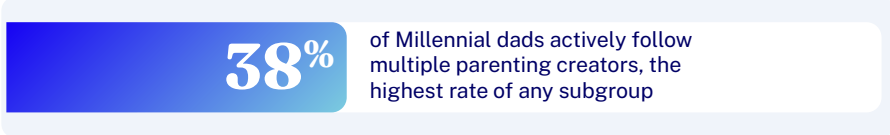
Most Parents Are Watching Creators. But Who They Follow and What They Trust Looks Very Different.

Nearly every parent in this study is engaging with creator content in some form.



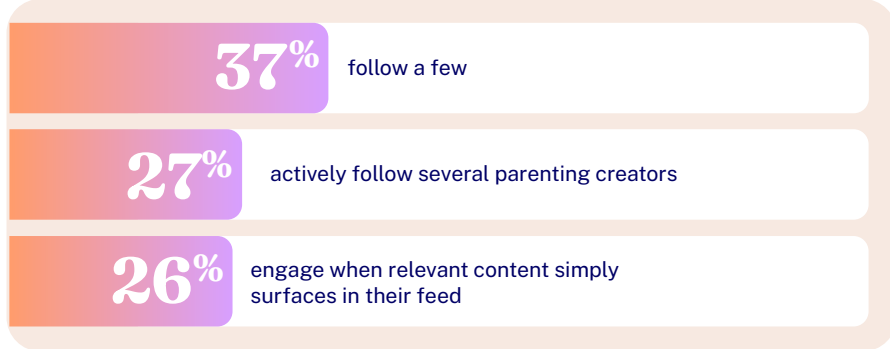
But what “following a creator” actually looks like varies dramatically by parent type.

Millennial dads are more likely to build intentional creator ecosystems rather than passively consuming whatever appears in their feed.

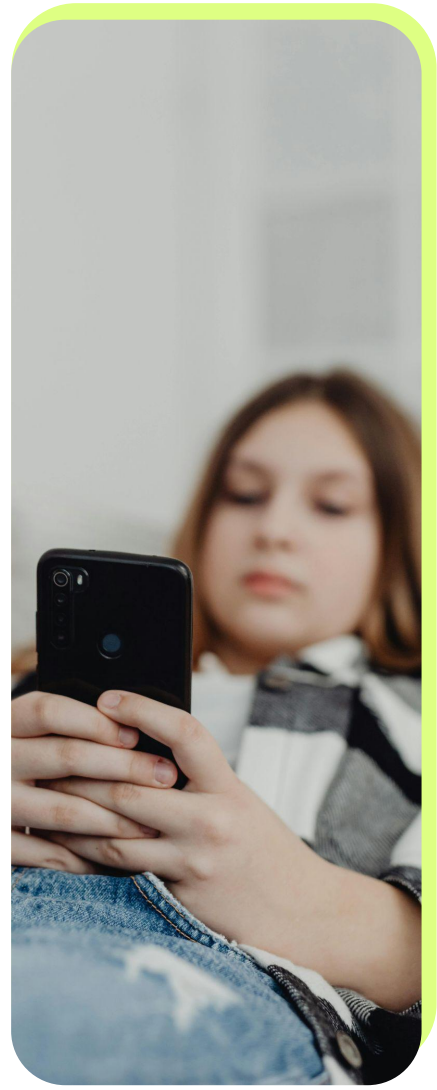


He is not casually scrolling. He has likely identified a handful of voices he trusts, and once credibility is established, those recommendations carry weight.

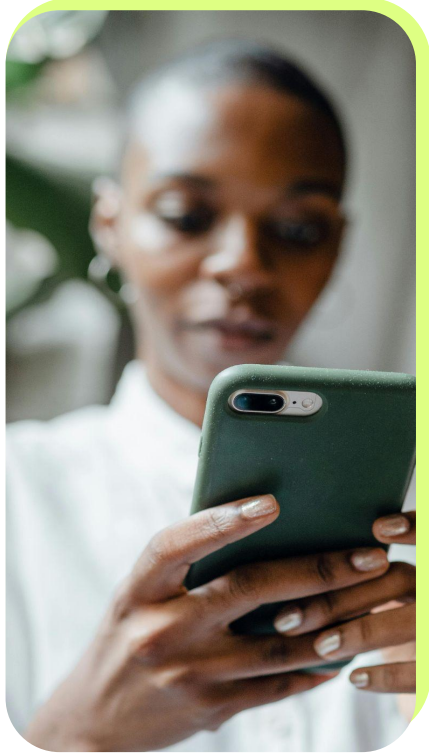
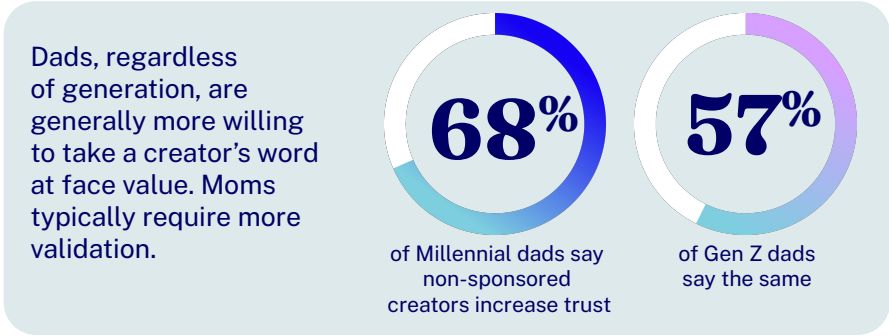
Gen Z moms operate differently. Their relationship with creator content is often looser, more fluid, and more algorithm-driven.



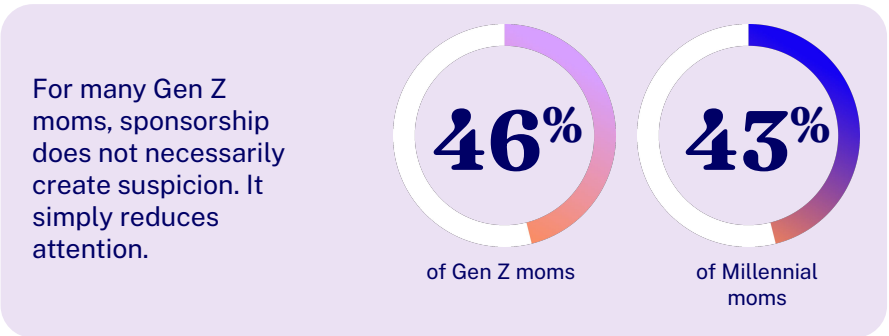
She is less likely to curate a fixed list and more likely to let discovery happen passively, deciding in real time whether content feels worth her attention.



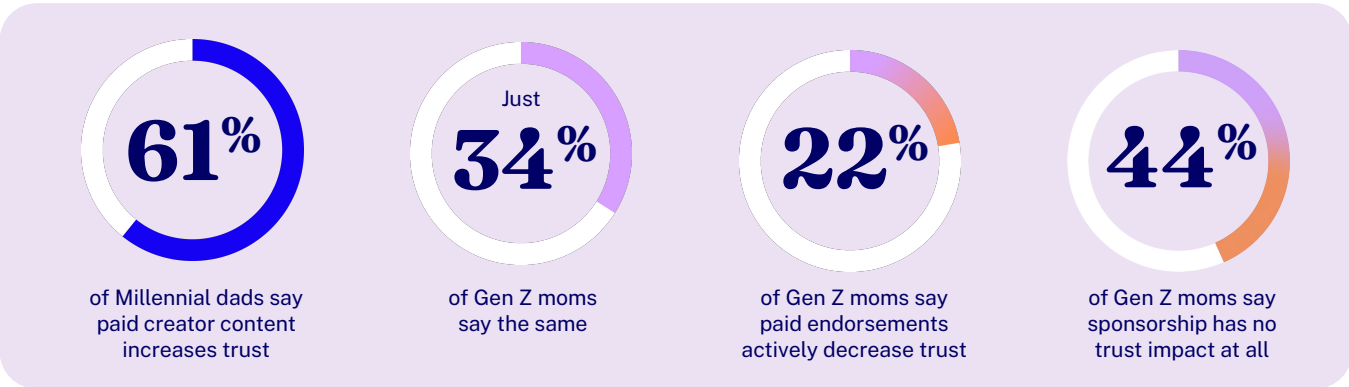
When creators are unpaid:



Among moms, trust drops significantly:

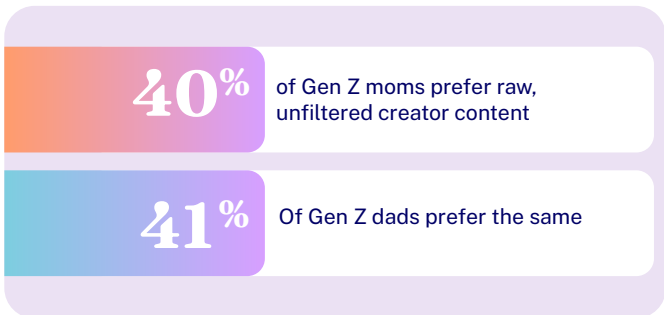


When creators are sponsored:



For many Gen Z moms, sponsorship does not necessarily create suspicion. It simply reduces attention. And beyond the message itself, presentation style matters. A phone on the kitchen counter. Real mess in the background. No script.

That preference for realism shows up especially strongly among Gen Z parents.

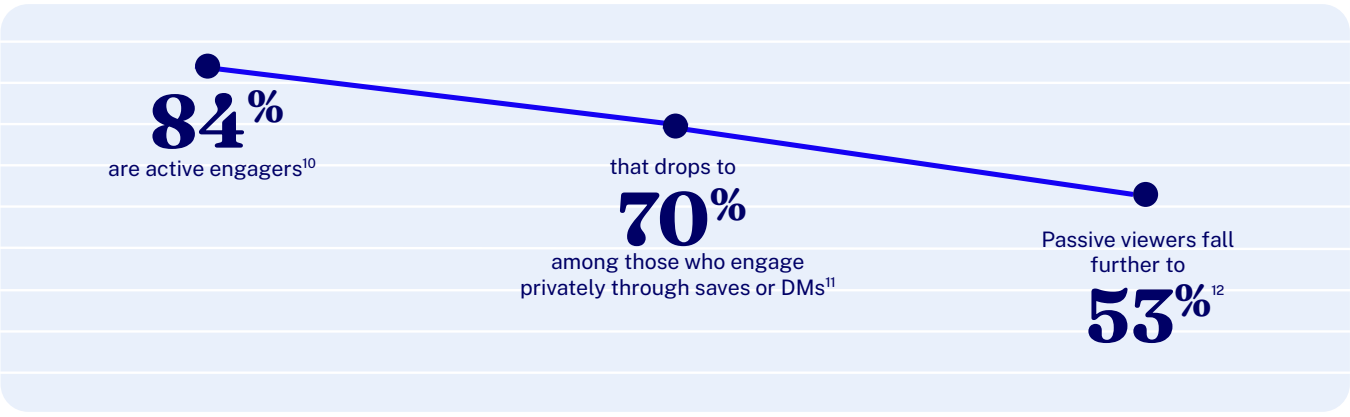


Millennials lean differently:



The Parents Who Engage Publicly Are the Parents Who Buy.

The more intentionally parents engage with parenting content, the more likely they are to take action afterward.



How parents engage matters just as much as whether they engage at all.

That difference becomes even clearer when looking at Millennial and Gen Z parents side by side.

43% of Millennials engage publicly with parenting content

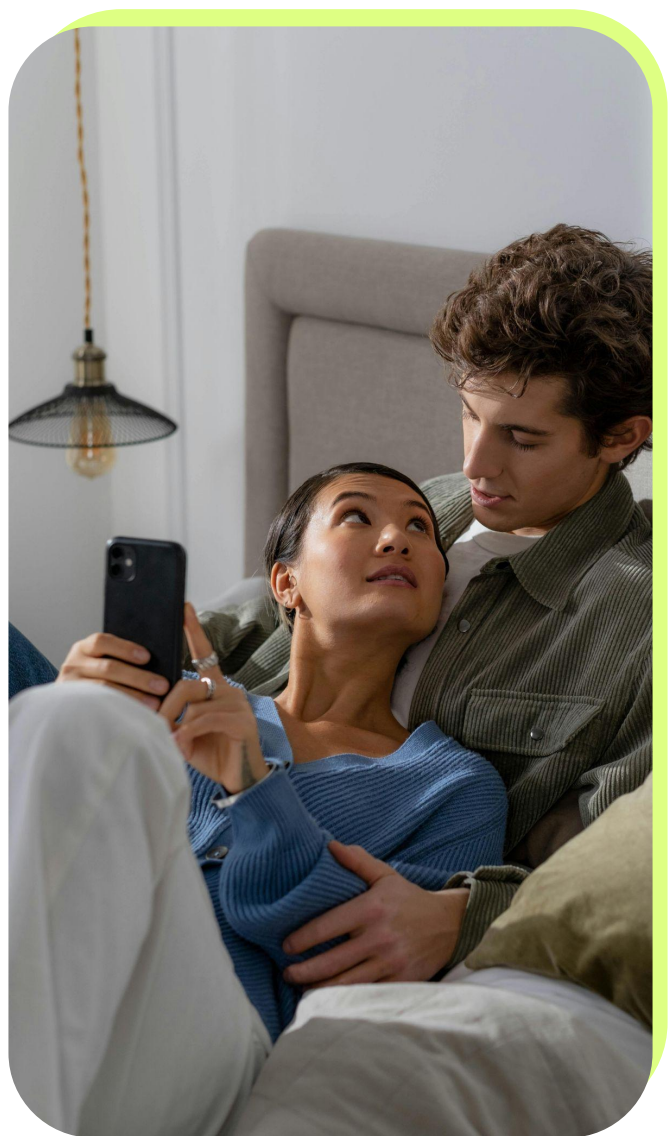
compared to **36%** of Gen Z

42% of Gen Z parents engage privately

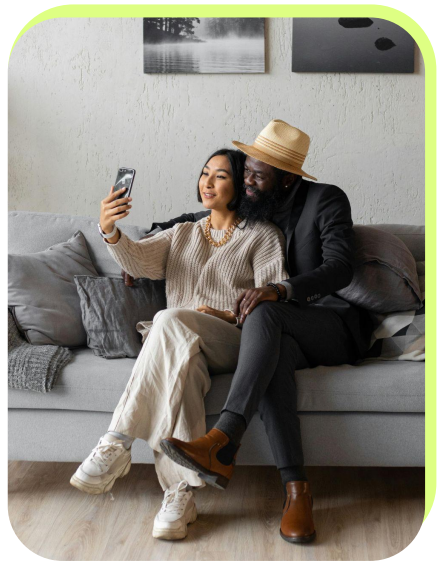
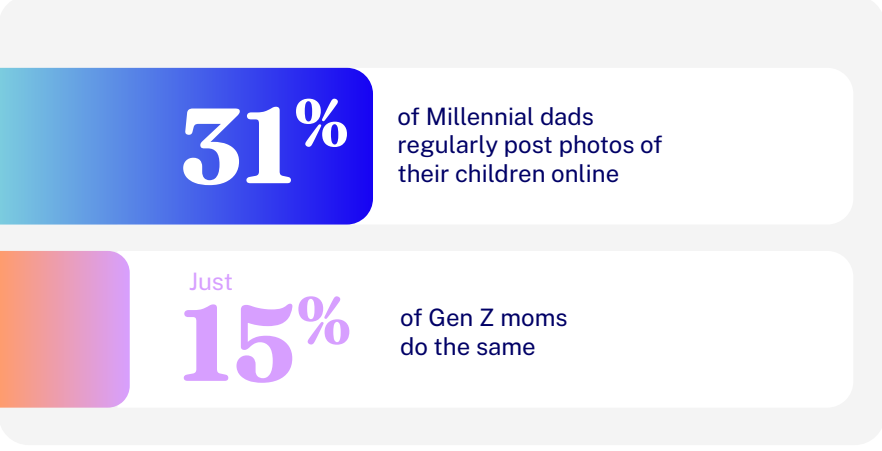
compared to **36%** of Millennials

Millennials are more likely to signal purchase intent openly through visible engagement.

Gen Z is often just as engaged, but their behavior is more likely to happen in less visible ways, through saves, shares, DMs, and private reconsideration rather than public interaction.



That same divide extends into how parents share their own families online.



When parents choose to limit family sharing:



For many parents, especially younger ones, privacy is not a sign of disengagement. It is a more intentional decision about what parts of family life remain personal.



There Is No Single Path to Purchase.

A Gen Z mom is on the couch after bedtime, scrolling TikTok. A creator she half-follows shows a product in a real kitchen, mid-chaos, kid screaming in the background. She saves the video.

A Millennial dad is on his lunch break, typing a product category into Google because he read a Reddit thread about it last night. He clicks through to YouTube, watches a seven-minute comparison review, opens Amazon in another tab.

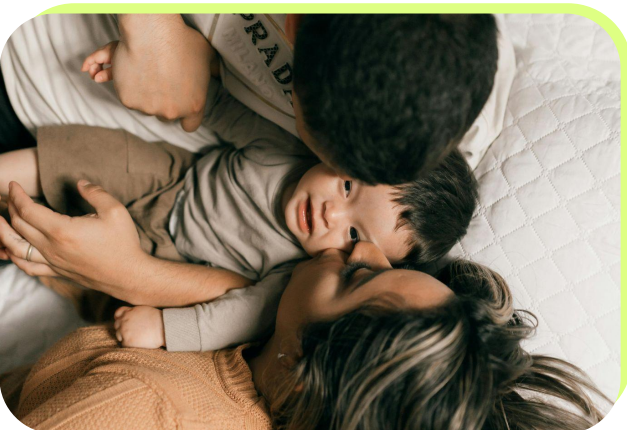
A Gen Z dad is in the store, picking up a product, turning it over, reading the back label. He wants to see it, hold it, decide for himself.

A Millennial mom heard about it from another parent at school pickup. Later that night, she checks Google Reviews, glances at YouTube, and mentally files it away until the purchase feels relevant.

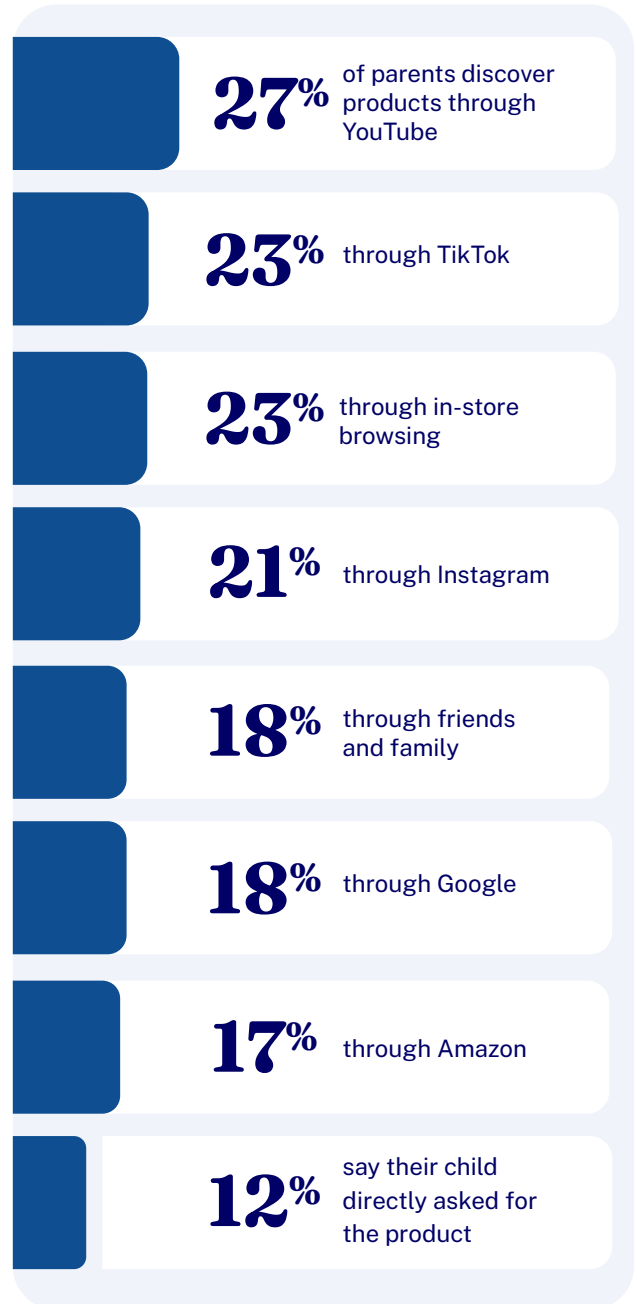
Same moment. Completely different decision systems.

At the aggregate level, parent product discovery is highly fragmented.

Parents move fluidly between digital platforms, physical retail, search, social recommendations, and real-world exposure depending on the category, urgency, and level of consideration involved.



Where Parents Actually Discover Products:



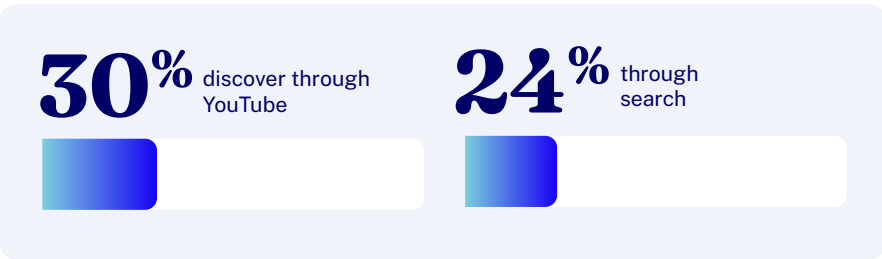
No single channel overwhelmingly dominates across the full parent population.

But once the data is segmented by generation and gender, much clearer behavioral patterns begin to emerge.

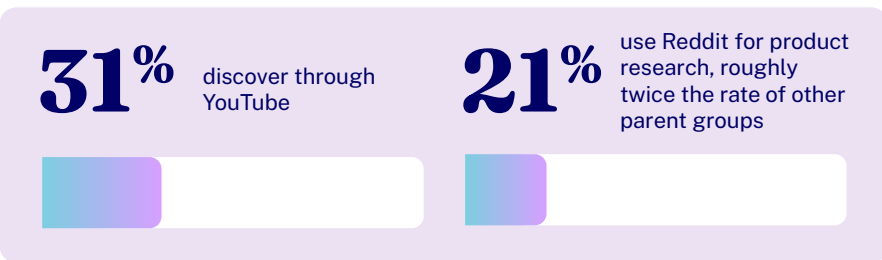
Gen Z moms lean heavily into social-first discovery:



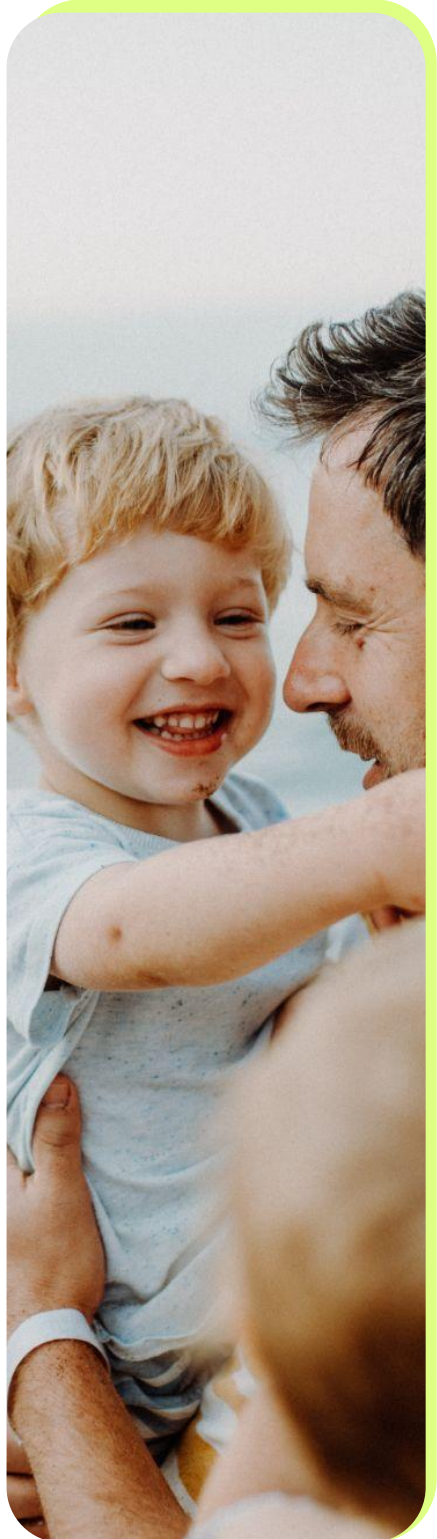
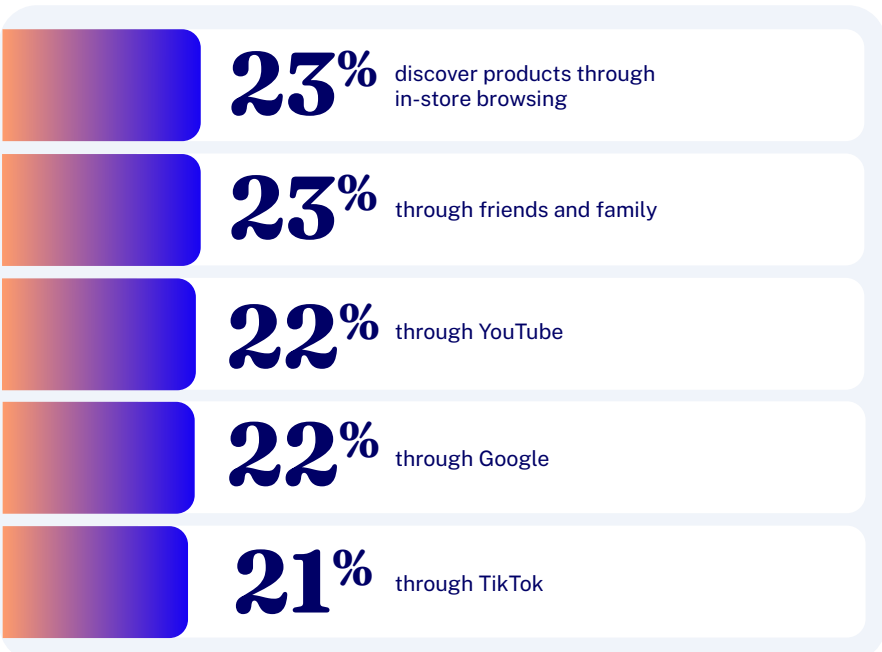
Millennial dads show a more utility-driven discovery pattern:



Gen Z dads stand out as the most digitally exploratory parent segment in the study:



Millennial moms show the most distributed discovery behavior of any parent cohort:

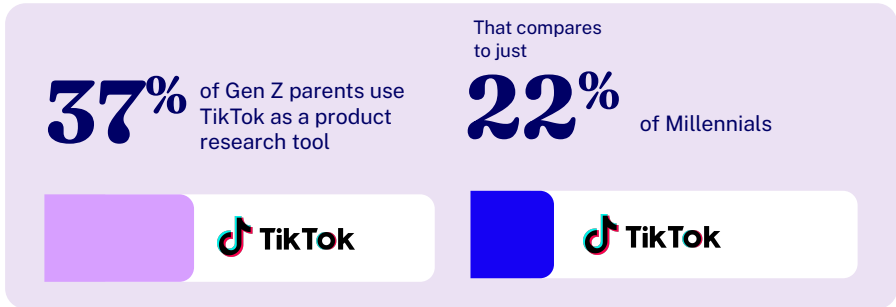


Some Parents Research. Others Stay in the Feed.



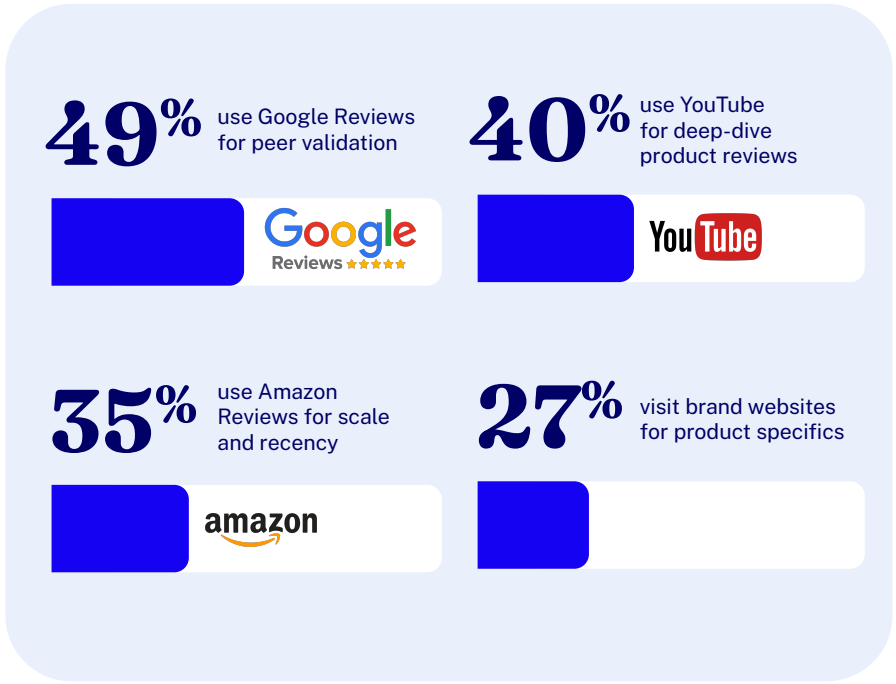
For many Gen Z parents, discovery, validation, and reconsideration all happen within the same ecosystem.

They see the product, search for more content about it, save it, revisit it, and often make decisions without ever leaving the app.



For Millennials, each platform serves a distinct role.

Purchase confidence builds cumulatively across multiple sources.



What Finally Gets a Parent to Buy.

There is a point between interest and purchase where the decision either happens or stalls. And for each parent group, that moment looks very different.

Millennial dads move fastest.

He is the most likely parent to trust, click, and buy without adding extra friction.



Millennial moms take a more deliberate path.

She is rarely impulsive. When she buys, it usually happens after her own validation process.



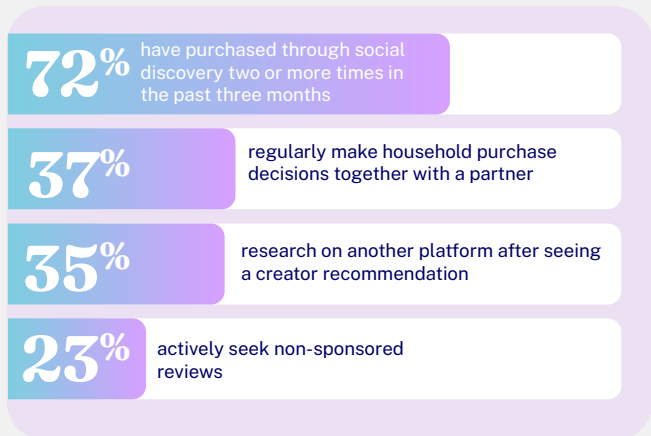
Gen Z moms are selective, but when it matters, they go deeper than anyone.

She may not overthink the snack aisle. But when the purchase feels important, she becomes the most intensive researcher in the study.



Gen Z dads sit somewhere in the middle.

He is open to influence, but he rarely relies on one source alone. His path is more balanced, practical, and often shared.



The path to purchase may look different for every group. Every parent in this study is looking for some version of reassurance before they buy. What creates that reassurance changes dramatically from one group to the next.

Price Wins in Some Categories. Values Win in Others.

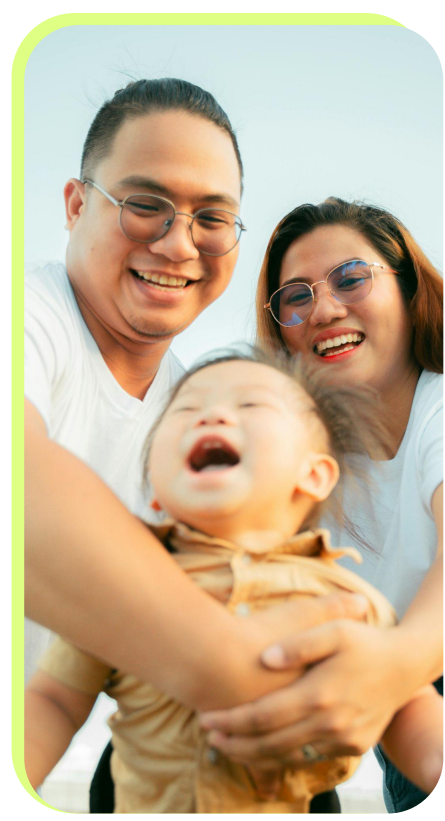
Ask parents what matters most when they are buying for their family, and price is not the first thing they mention.



Parents are often willing to pay more when they believe something is genuinely better.

But what counts as "worth paying more for" shifts dramatically depending on what they are buying and who it is for.

Where parents are most willing to pay more:

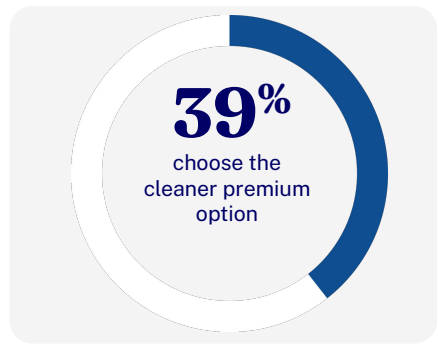


But what parents say they value and what they actually choose are not always the same thing.

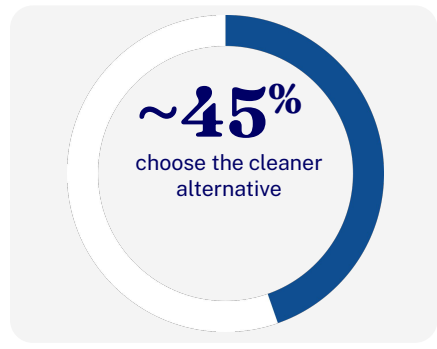
For everyday household goods:



For children's food:

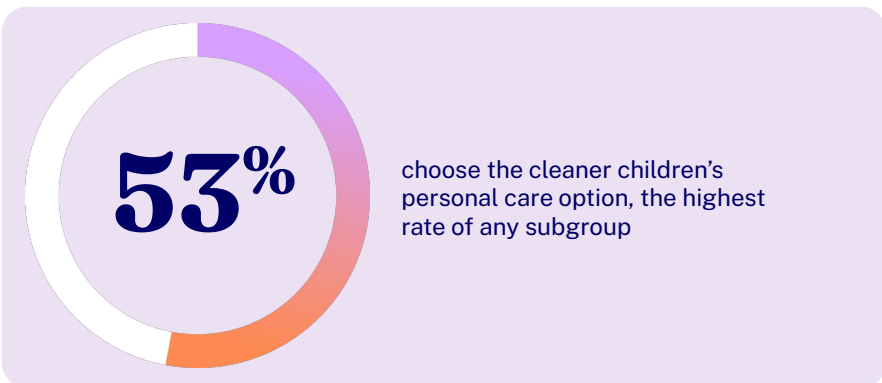


For baby products and children's personal care:



The closer a product gets to what a child eats, wears, or absorbs, the more parents are willing to scrutinize what is inside it.

Gen Z moms lead this shift most clearly:



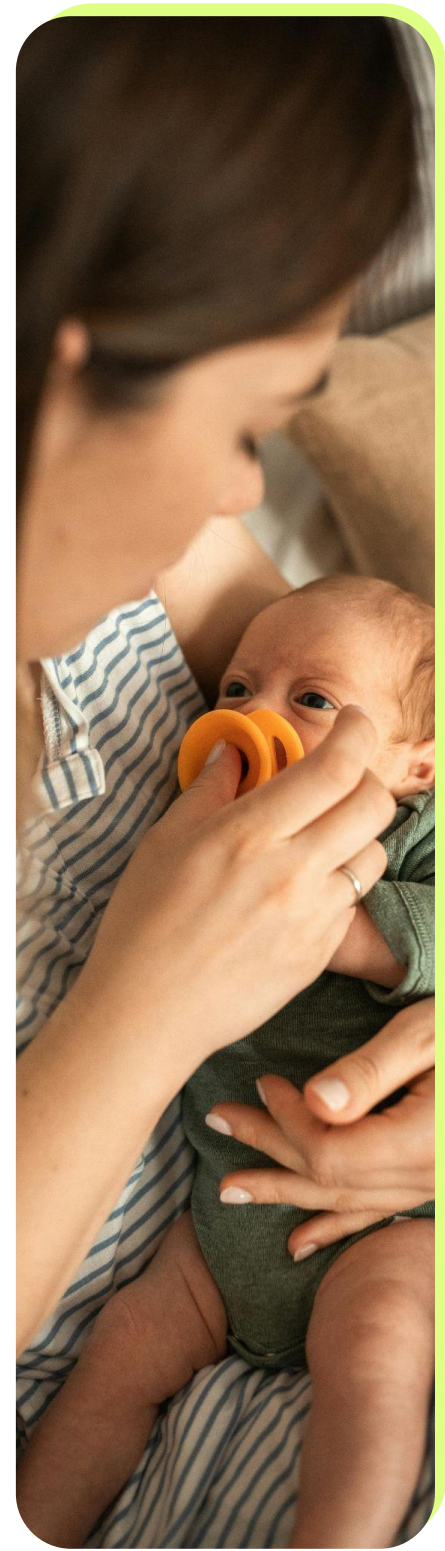
This is particularly notable because Gen Z moms are often among the most skeptical and selective consumers throughout the broader data. But when a purchase feels directly tied to their child's wellbeing, priorities shift quickly.

The motivation is rarely abstract sustainability alone.

- It is usually more immediate.
- Safety.
- Ingredients.
- Direct impact.

"If you can offer a good product while also offering those features, yeah, I would prefer the good product that's sustainable over the good product that's not. But don't focus on sustainability at the expense of providing a good product."

(Male, 40-45)

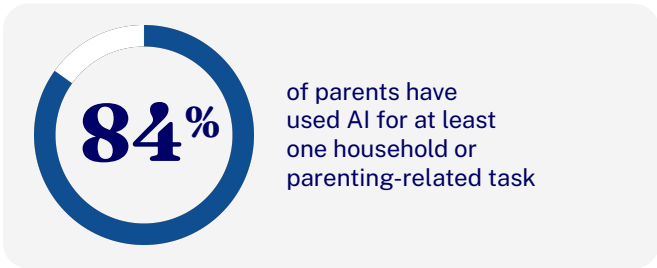


It Started as a Tool. Now It's a Parenting Support System.

Every generation of parents has had a trusted source for the moments when they did not have the answer.

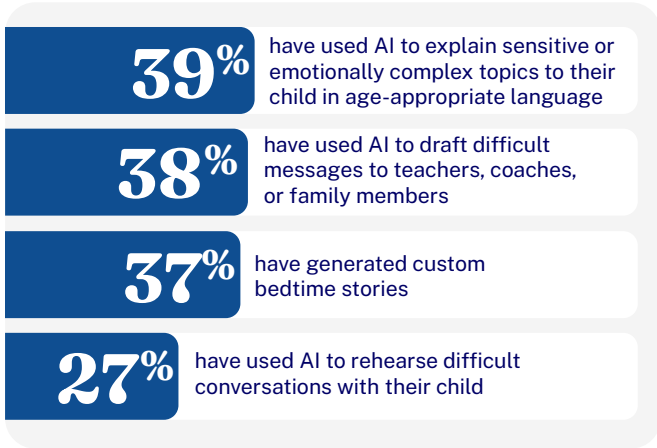
For Boomers, it was Dr. Spock and their own mothers. For Gen X, it was What to Expect When You're Expecting and the pediatrician's after-hours line. For early Millennials, it was mommy blogs and WebMD.

For this generation, that source is increasingly a conversation with an AI.



What started as convenience quickly expanded into something much more personal.

Parents are turning to AI not just for efficiency, but for moments that feel emotional, uncertain, or difficult to navigate alone.

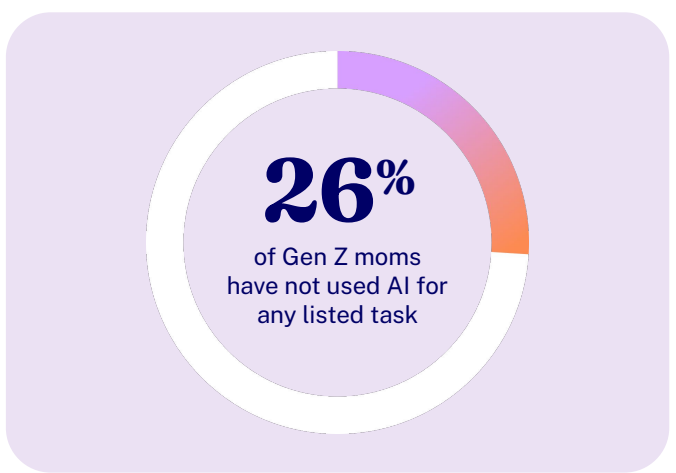


The shift is subtle but important. AI is no longer functioning only as a productivity tool. In many households, it is starting to operate as a form of emotional support infrastructure.

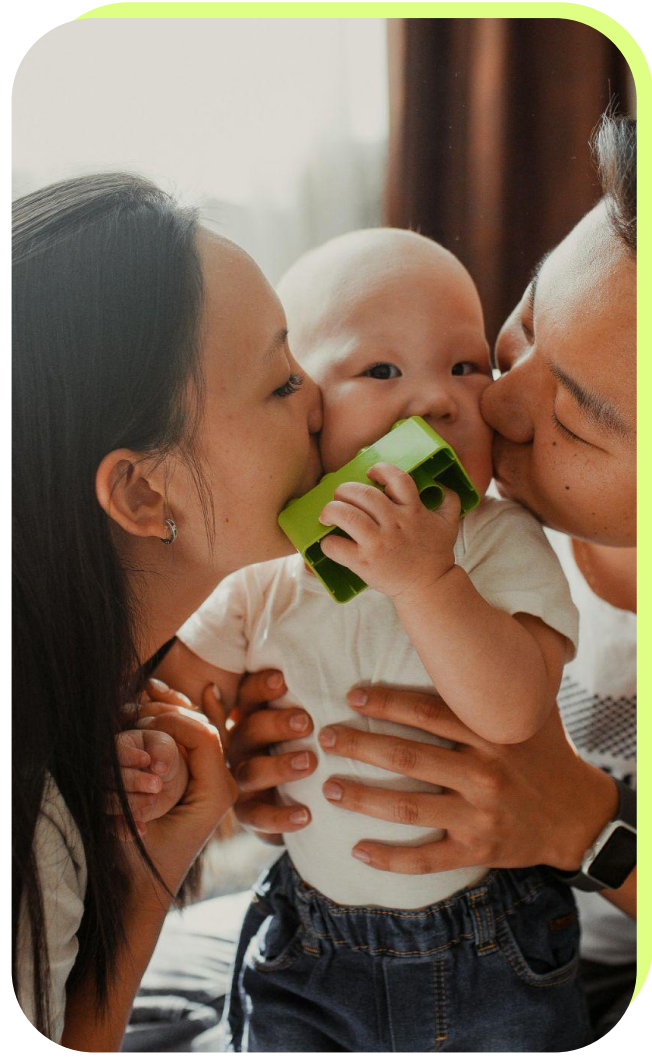
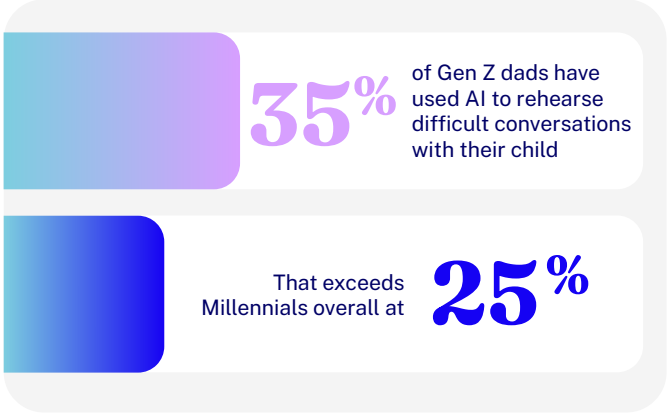
"I thought I was not doing something right, and ChatGPT reassured me that no, this is all normal, this is what you should do. And it worked great."

(Female, 30-34)

Gen Z approaches the technology more cautiously.



But even that caution has limits.



The hesitation often seems less about technology itself and more about how much influence these tools should have inside family life.

That broader caution is already appearing outside the parenting space as well.

Gen Z's lower adoption reflects a broader generational pattern. According to a 2026 Gallup study, Gen Z's excitement about AI has dropped 14 points in a single year to just 22%, while anxiety holds at 42% and anger has risen 9 points to 31%. Even among Gen Z's daily AI users, excitement fell 18 points year over year. And 80% of Gen Zers say using AI tools will likely make it harder to learn in the future.¹³

Our parenting data follows that same direction.

Gen Z parents are not rejecting AI outright. But they are significantly more cautious about what new technologies are allowed into their lives, especially when those tools directly shape their children's experiences.

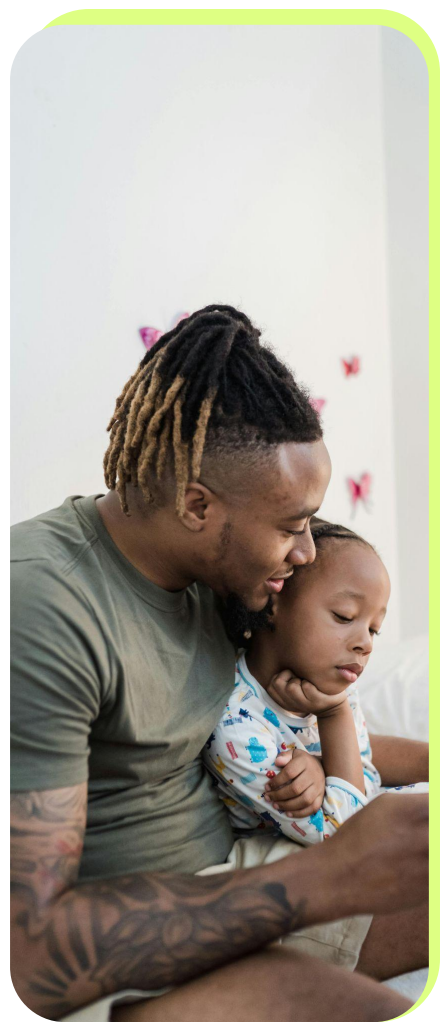
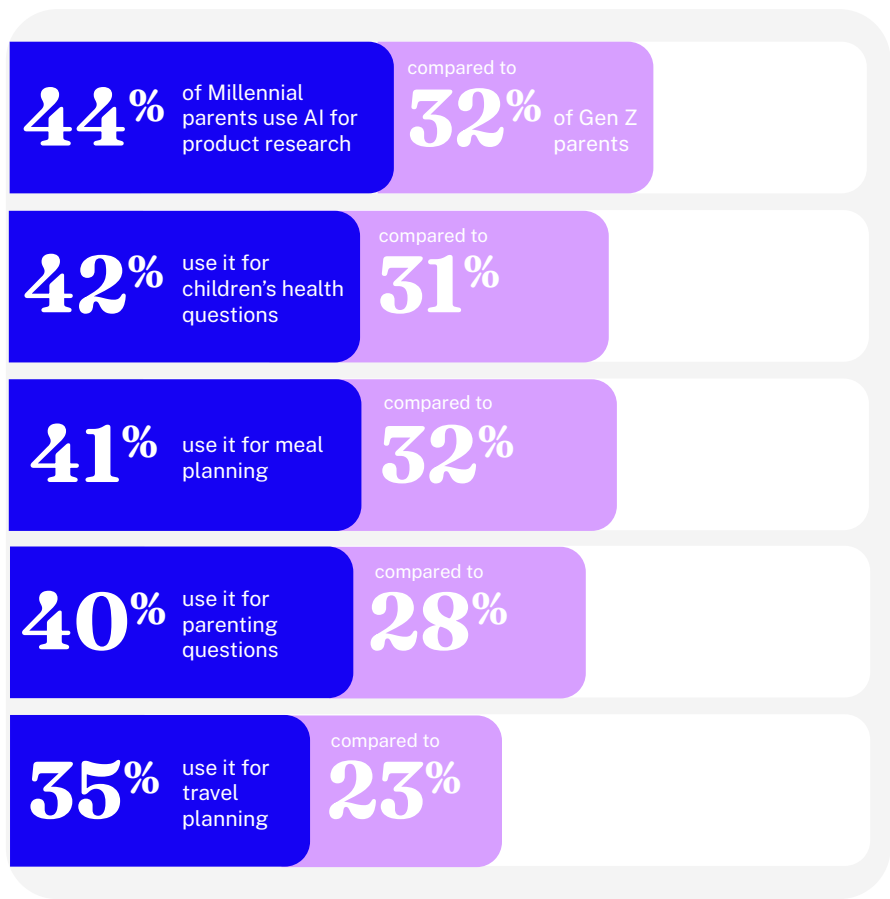
Parents are not turning to AI because they want less human connection. They are turning to it because modern parenting increasingly feels impossible to navigate alone.

In many households, AI is not replacing expertise, community, or instinct. It is filling the gaps left behind by disappearing support systems, fragmented trust, rising expectations, and constant pressure to get parenting "right."

The technology story matters. But the human story underneath it matters more.

The Generation That Grew Up with Technology Is Not the One Leaning on AI Most.

Across nearly every category, Millennials are more likely to use AI than Gen Z parents.



No group leans into AI more aggressively than Millennial dads.



AI is not replacing parenting for him. It is helping him keep up with the version of parenting he feels expected to deliver.



Two Generations.
Four Distinct
Playbooks.

Across six chapters, one pattern has remained consistent: there is no single parent audience.

How parents define their role, divide responsibilities, process pressure, build trust, adopt technology, and make purchasing decisions differs meaningfully across both generation and gender.

Four distinct parent profiles emerge from the data, each with its own logic, filters, motivations, and path to action.



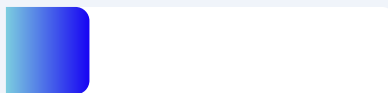
Millennial Dads: High trust, high action, high pressure.

He trusts broadly, researches deeply, buys frequently, and engages publicly.

77% read reviews for most purchases



21% from creator recommendations



50% have used AI for product research, the highest rate of any subgroup



He is one of the most active purchasers in the household, and one of the most responsive to external signals.

That pattern shows up consistently across the broader data.

78%

are strongly motivated by quality



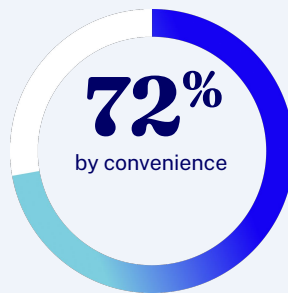
74%

by trusted recommendations



72%

by convenience



71%

by reviews



When information reaches him from a source he trusts, he is more likely to act on it.

That responsiveness helps explain why Millennial dads consistently post some of the highest conversion rates in the study.

But it also exists alongside significant pressure.

66% report guilt

55% report online comparison

53% report social media pressure

He has often adopted a parenting identity with both a philosophy and a performance standard, and he is actively measuring himself against it.

Where to find him:

- YouTube (**54%** several times daily)
- Google Reviews
- Amazon Reviews
- Instagram

He over-indexes on polished, credible, high-production content that feels authoritative.

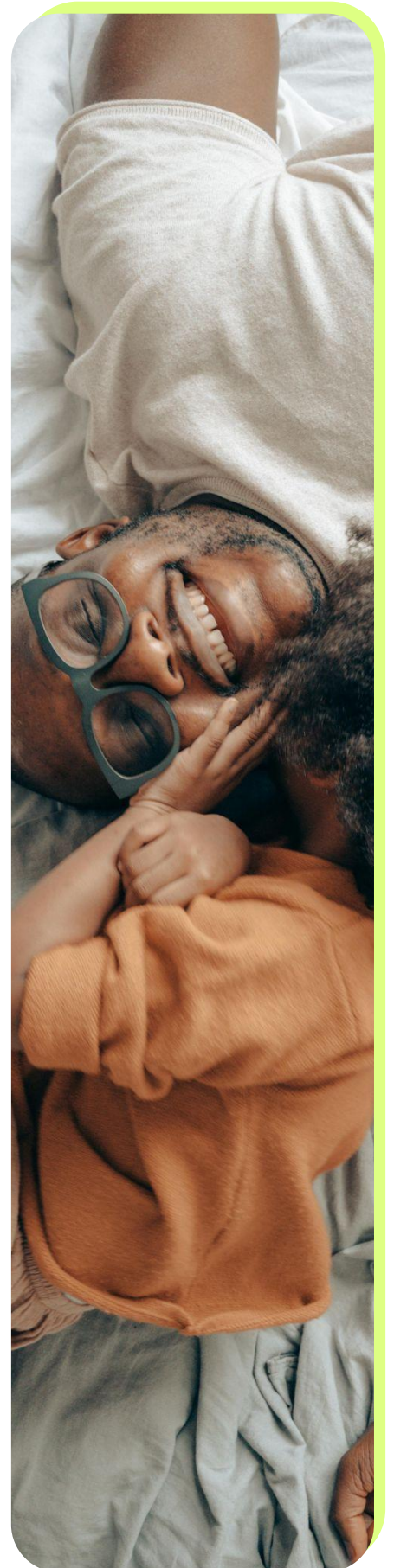
What resonates:

- Permission-based messaging
- Validation that he is already doing enough
- Product benefits centered on efficiency, quality, and practical performance
- Frictionless creator-to-cart experiences

What to avoid:

- Messaging that adds more performance pressure
- Unrealistic standards
- Additional optimization burdens

He already feels the weight of trying to get modern parenting “right.”



Millennial Moms: Conditional trust, structured validation, system management.

She follows many of the same broad trust patterns as Millennials overall, but her path to purchase is slower, more deliberate, and built around validation.

60%

purchased from social discovery two or more times in the past three months

31%

only read reviews for larger purchases

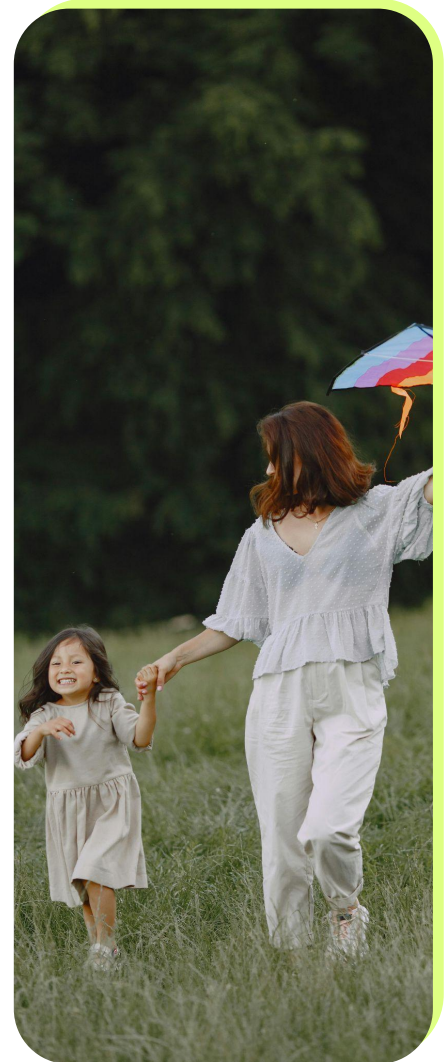
10%

do not watch creator video content at all

She is still converting. She simply tends to do it on her own timeline.

Unlike other parent groups, her discovery behavior is highly distributed. No single platform dominates how she researches, validates, or decides.

In-store browsing, friends and family, YouTube, Google, and TikTok all cluster within a narrow range for her. She is the most omnichannel parent in the study and often requires repeated exposure across multiple trusted environments before making a decision.



Her strongest purchase drivers reflect that same practical mindset.

Strongest purchase influences:

60% prioritize convenience

50% prioritize price

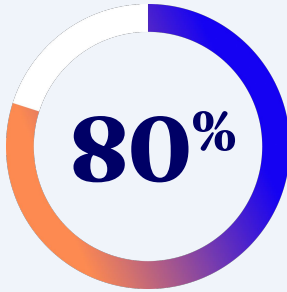
Convenience matters more than cost alone. If something feels easier to trust, easier to access, and easier to integrate into daily life, it gains meaningful ground.

She is also quietly integrating newer tools into that process.

35%

use AI for product research, outpacing Gen Z moms

Emotionally, she often understands the value of self-care, but has not fully escaped the guilt around it.



80% say personal time makes them a better parent

And while conventional assumptions often position her as the primary household purchaser, the broader data suggests Millennial moms may be driving more research and conversion activity than many marketers assume.

Where to find her:

- Google Reviews (**45%**)
- Facebook Groups (**39%** for local discovery)
- Word of mouth (**38%** for local discovery, **29%** for product research)
- YouTube (**30%**) for validation

She trusts closed communities, practical recommendations, and accumulated credibility more than highly performative public feeds.

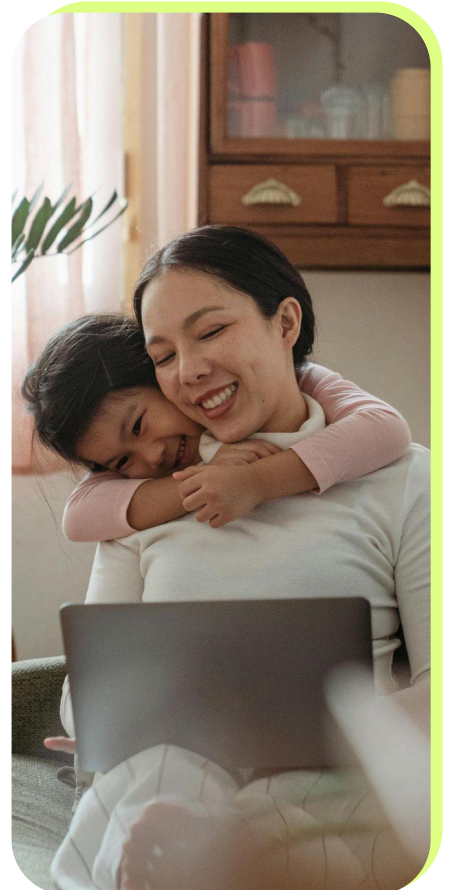
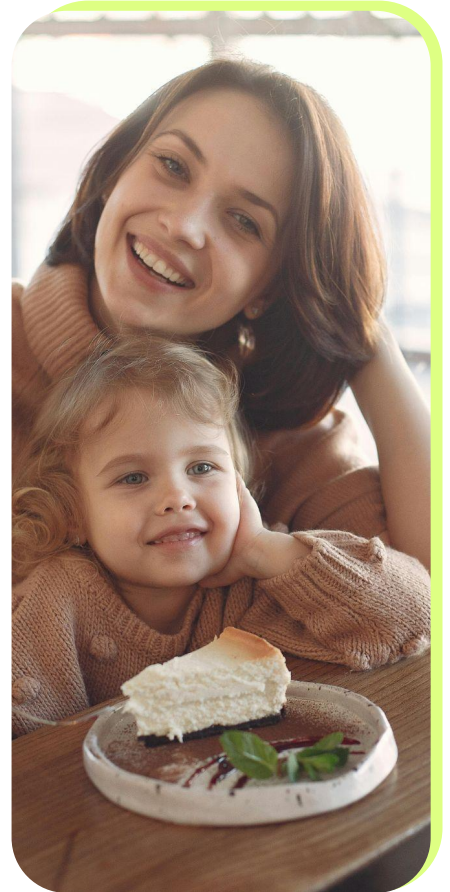
What resonates:

- Expert-backed messaging
- Pediatrician or authority-driven trust signals
- Practical convenience
- Messaging that explicitly connects self-care to parenting effectiveness
- Recognition that she is often carrying significant structural responsibility

What to avoid:

- Over reliance on creator-only strategies
- Assuming she is always the sole or default household shopper
- Single-platform campaigns

She is often reached through accumulation rather than immediacy. Trust builds over time, across multiple environments, before action happens.



Gen Z Moms: Low trust, selective action, high scrutiny.

She filters aggressively, engages privately, and grants trust carefully.

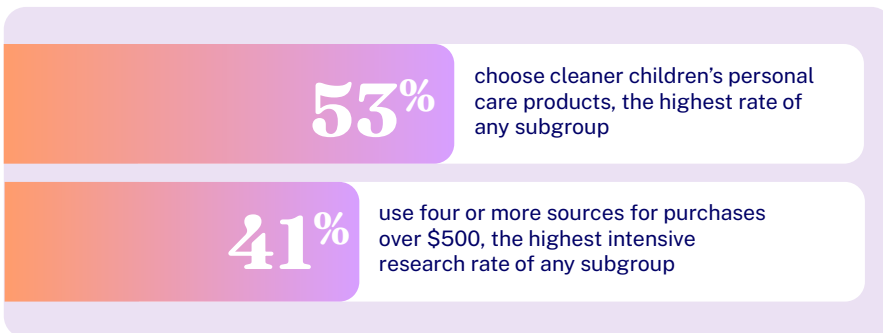


She is the most likely to remain neutral across key questions around self-care, satisfaction, and parenting identity.

At first glance, she can appear difficult to reach.

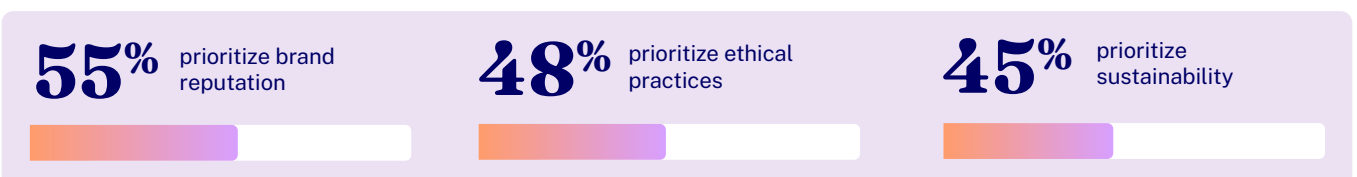
She is less publicly engaged, slower to convert, and more cautious about what she allows into her life and her child's environment.

But when the stakes feel higher, her attention deepens quickly.



And this is where her decision-making becomes more revealing.

Broad ideological positioning alone does not strongly move her.



But when products directly affect her child, especially in categories tied to ingredients, absorption, or safety, her behavior shifts dramatically.

Her decision-making is less about broad value signaling and more about perceived direct impact.



Where to find her:

46%

use TikTok
several times
daily

For Gen Z moms, discovery and research often happen inside the same platform ecosystem. She is more likely to save, bookmark, compare, and privately validate before ever clicking through or purchasing.

What resonates:

- Specificity over aspiration
- Ingredient transparency
- Safety-first product framing
- Price and reviews in lower-stakes categories
- Realistic home environments that feel familiar

What to avoid:

- Broad sustainability positioning without practical relevance
- User-generated content asks that require public participation
- Messaging that assumes she wants to post, share, or publicly advocate

She may be quieter, but that should not be mistaken for disengagement.

She is often one of the most controlled, selective, and high-scrutiny decision-makers in the household.



Gen Z Dads: Shared decision-making, hybrid behavior, practical focus.

He is the most collaborative household decision-maker in the study.



He is often actively involved in both family logistics and household purchasing decisions.

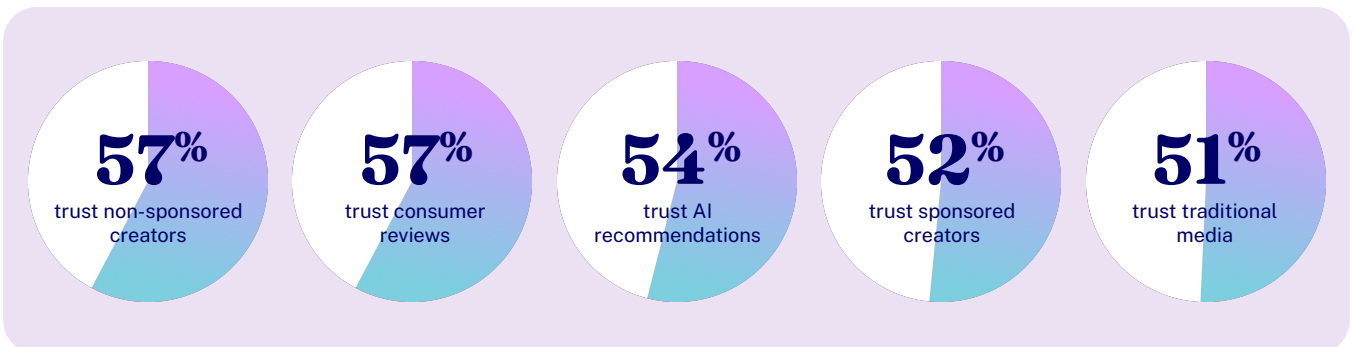
He shows up in the grocery aisle. He inspects products. He moves fluidly between physical retail, social platforms, creator content, and community-driven research.

And that hands-on behavior does not make him less digitally engaged.

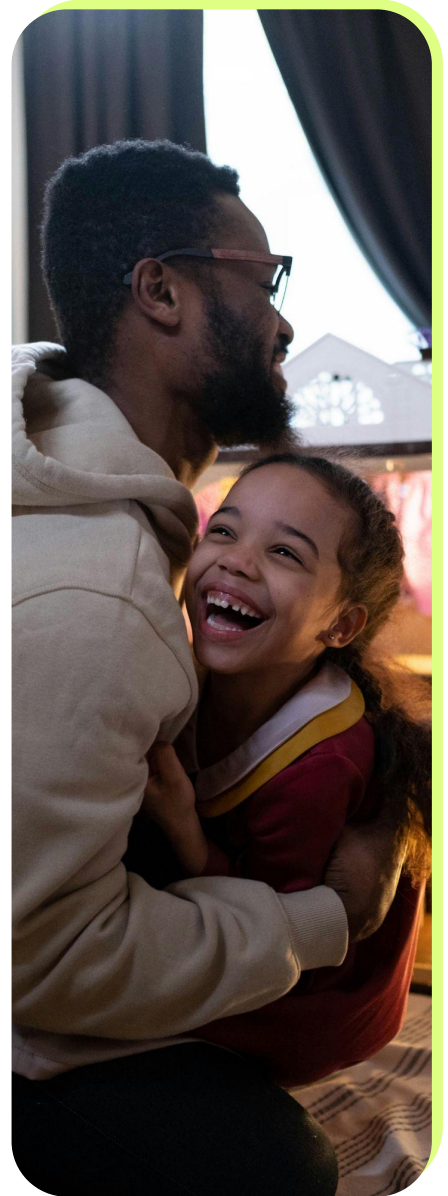


His behavior is highly hybrid. He participates across platforms, across environments, and across decision-making systems rather than relying on a single dominant source.

That same flexibility appears in how he builds trust.



No single source dominates his decision-making, but few sources are dismissed outright either.



Compared to other groups, he is more likely to evaluate broadly and assemble trust across multiple inputs rather than defaulting to one primary system.

Additional behavioral signals reinforce that same pattern:

21% use Reddit for product research, the highest rate of any subgroup

44% spend personal time gaming

31% prioritize date nights

His identity is often less singularly centered around parenting than other parent groups in the study.

Where to find him:

- Reddit
- YouTube
- TikTok

He is also the only major subgroup nearly split between raw and polished content styles:

- **41%** prefer raw, unfiltered content
- **32%** respond to polished production

What resonates:

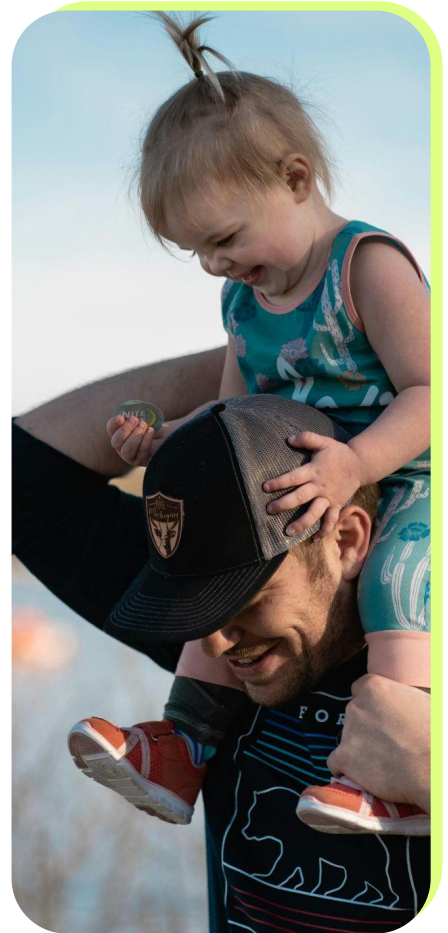
- Shared-decision tools
- Practical product problem-solving
- Real-life household hacks
- Values messaging when directly tied to quality
- Clean ingredients (**60%**)
- Ethical practices (**58%**)

He is actively shaping how his household operates and is receptive to products that help make that system work more smoothly.

What to avoid:

- Messaging that assumes moms are the sole household decision-makers
- Single-buyer assumptions
- Campaigns that ignore collaborative purchasing dynamics

In his household, purchasing decisions are often being discussed, evaluated, and validated by two people together.





The Path Forward

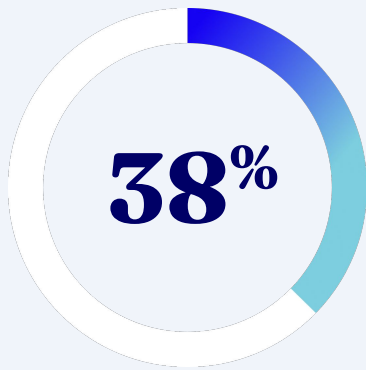
For Content Creators and Influencers

The parenting content landscape is still overwhelmingly built around moms.

But the data suggests fathers are often watching, comparing, and internalizing pressure at even higher rates. That creates a major opportunity.

Content that speaks directly to dads, especially messaging that offers reassurance and permission rather than simply raising performance expectations, is reaching an audience that has often been underserved.

Key audience dynamics:



38% of Millennial dads actively follow several parenting creators, making them the strongest “appointment viewers” in the study



Gen Z parents behave differently.

They are more likely to engage casually, privately, and algorithmically rather than through deliberate long-term creator loyalty.

Gen Z content behavior:

- More short-form
- More passive discovery
- More private validation
- Stronger preference for raw, unfiltered, real-life content over polished production

For Millennials, the ideal balance looks different. Authenticity still matters, but credibility is often strengthened by a level of polish, expertise, and structure.

Strategic Implication:

- **Gen Z:** Raw, relatable, real-life content performs best
- **Millennials:** A blend of authenticity and polish feels most trustworthy
- **Dads:** Permission messaging may outperform aspiration-only narratives

The industry has largely centered moms in parenting conversations.

The data suggests that may be leaving one of the most engaged, pressured, and commercially responsive parenting audiences significantly underserved.

For Media Planners, Buyers, and Agencies

YouTube should remain the anchor of any parent-focused media plan.

- **77%** of parents use YouTube daily
- **TikTok** remains critical for Gen Z discovery, but across the broader parent landscape, YouTube's daily reach is significantly stronger



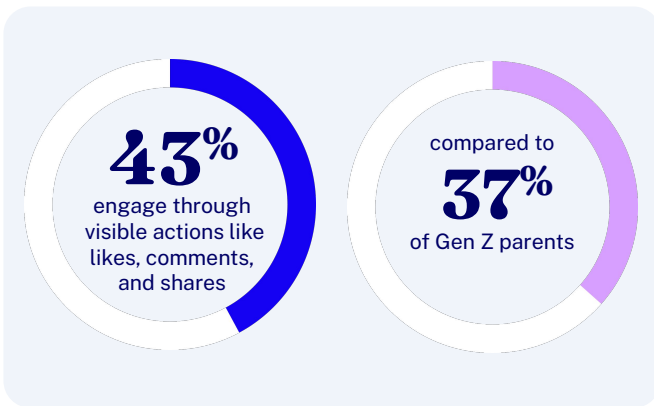
Platform priorities:

- **YouTube:** Core reach and validation engine
- **TikTok:** Essential for Gen Z discovery and in-platform research
- **Facebook:** Still highly relevant, particularly for Millennials
- **In-store:** Drives as much total product discovery as TikTok (**23%** each) and should remain a major consideration, especially for CPG brands

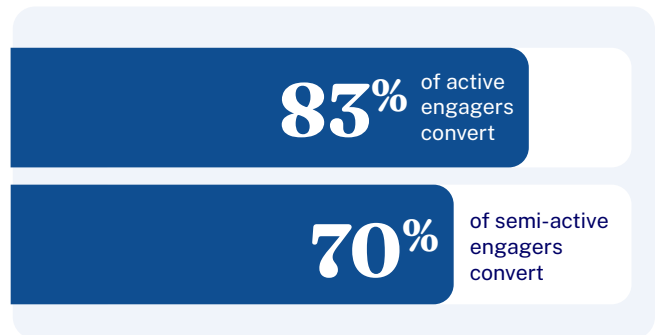
Physical retail is still playing a larger role than many digitally focused strategies assume.

KPI strategy should shift by audience:

Millennials are more likely to engage publicly.

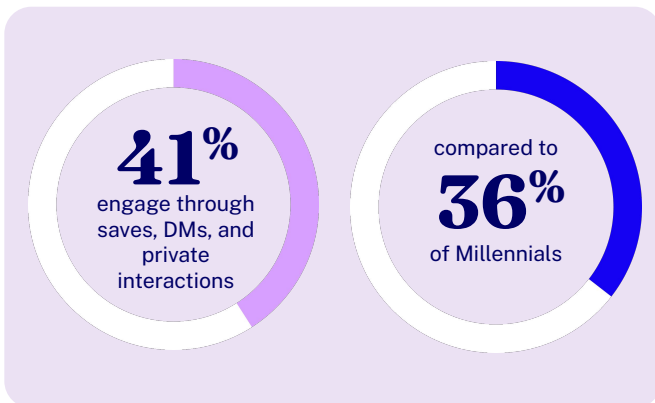


Conversion matters

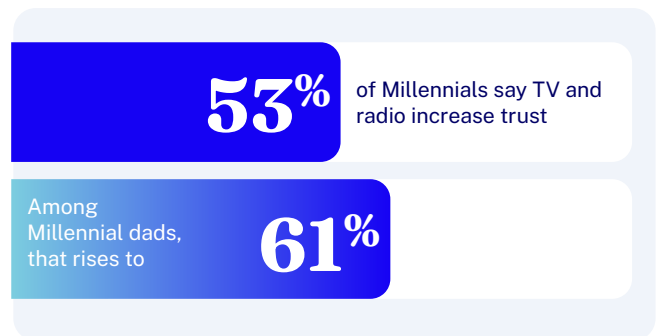


The metrics you prioritize will directly shape which audience behaviors you actually see.

Gen Z is more likely to engage privately.



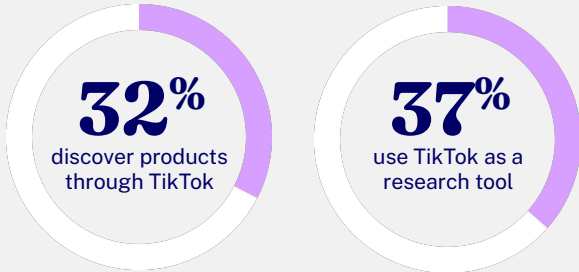
Traditional media remains more relevant than many assume:



For Millennial-focused parent campaigns, traditional media should not be dismissed outright.

Discovery and research architectures differ significantly:

Gen Z



Gen Z is far more likely to stay within a smaller ecosystem, often moving from discovery to validation without leaving the platform.

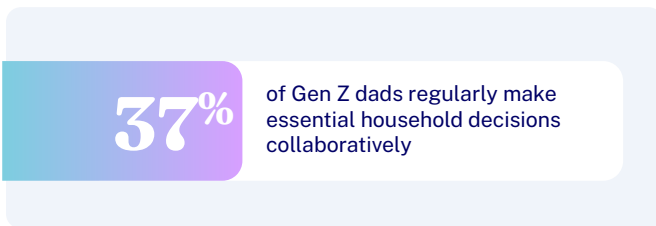
Millennials

- More likely to sequence decisions across YouTube, Google Reviews, Amazon, and brand websites



A campaign optimized for one behavior system may significantly underperform with the other.

Household decision-making also matters:



Campaigns targeting only one household decision-maker may miss how many younger households actually operate.

AI strategy:

Millennials are currently the stronger near-term audience for AI-integrated brand experiences.

Gen Z is showing increasing skepticism:

- Gallup reports Gen Z excitement around AI has dropped **14 points year over year**

Gen Z parents may require significantly more trust-building before AI-powered recommendations meaningfully influence family purchasing behavior.



For Advertisers and Creative Teams

The data makes one thing clear: there is no single “parent audience.”

The four major parent groups often require four very different creative strategies.

Millennial Dads

- Respond best to polished, credible, quality-forward content
- Prefer frictionless purchase paths
- Strongly influenced by trusted recommendations, reviews, and efficiency

Gen Z Dads

- Respond best to community-validated, problem-solving content
- More likely to trust practical demonstrations, peer conversations, and Reddit-style validation

Gen Z Moms

- Respond best to raw, highly specific, realistic messaging
- Ingredient-led and safety-first messaging performs strongest in children’s categories
- Price and reviews matter more in lower-stakes purchases

Millennial Moms

- Respond best to expert-endorsed, peer-confirmed messaging
- Closed communities, reviews, and authority signals carry more weight than broad creator strategies

Sustainability strategy should be category-specific:

Parents are not applying sustainability values equally across all purchases.

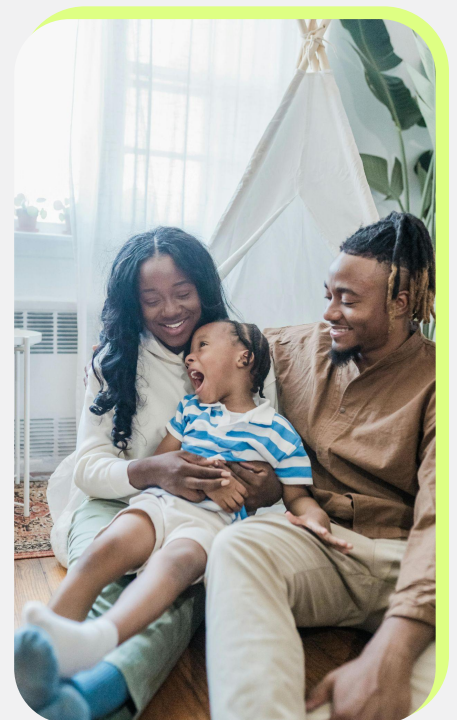
Where sustainability matters most:

53%

choose cleaner options in children’s personal care

45%

choose cleaner options in baby products



Where value dominates:

68% choose conventional household products when they cost less and have stronger reviews

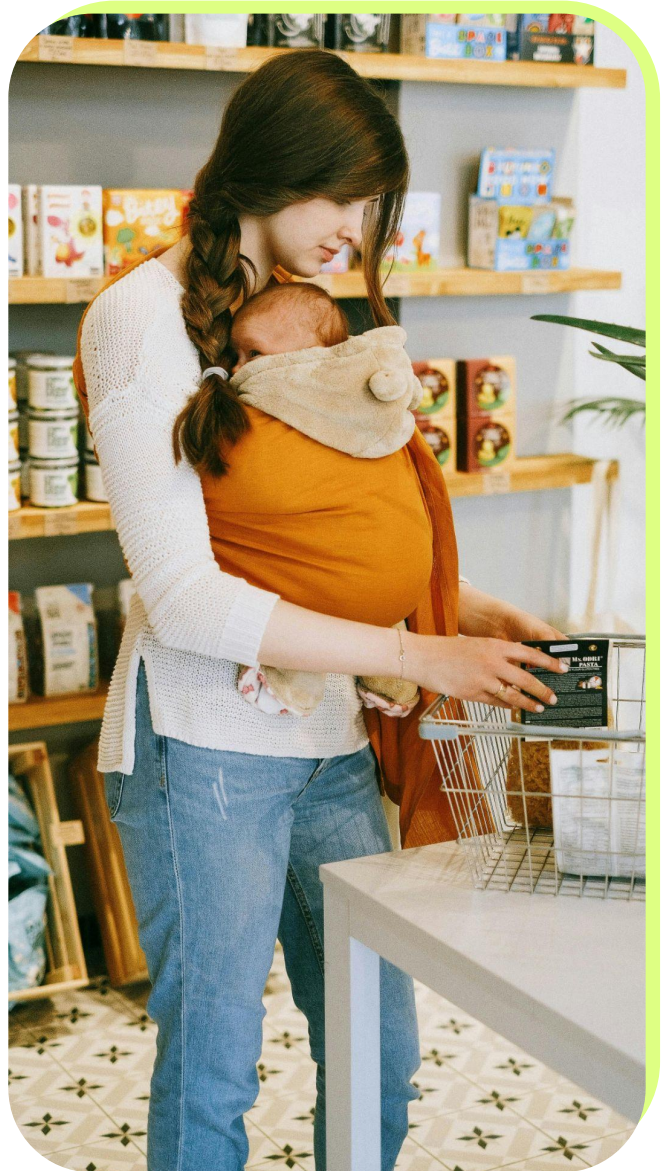
Strategic implication:

- Lead with sustainability where parents are already scrutinizing ingredients and child impact
- Lead with value, convenience, and reviews in everyday household categories

Privacy expectations matter:

45% of parents limit sharing their children online primarily for safety reasons

That means brands should stop assuming parents want to publicly post their lives with products.



Better approaches:

- Private sharing mechanisms
- Parent-focused storytelling
- Utility and experience-led campaigns
- Safety-conscious engagement strategies

Modern parent marketing performs best when it aligns with how parents actually live, decide, and protect their families, rather than how legacy marketing assumptions say they should.

For Brand Marketers

What you lead with should depend entirely on what the product actually touches.

If it goes on or into a child, parents evaluate it differently.

In child-adjacent categories:

Lead with:

- Safety
- Ingredients
- Transparency
- What is absent

52% of parents say they would pay more for sustainable children's personal care



51% say the same for children's food



In general household categories:

Lead with:

- Price
- Reviews
- Performance
- Convenience

Parents are not blanket premium buyers. Their priorities shift based on perceived child impact.



Parents are not blanket premium buyers. Their priorities shift based on perceived child impact.

Gen Z moms are one of the clearest examples of this selective logic.

53%

choose cleaner children's personal care products, the highest rate of any subgroup

But outside of child-specific categories, she often defaults back to value.

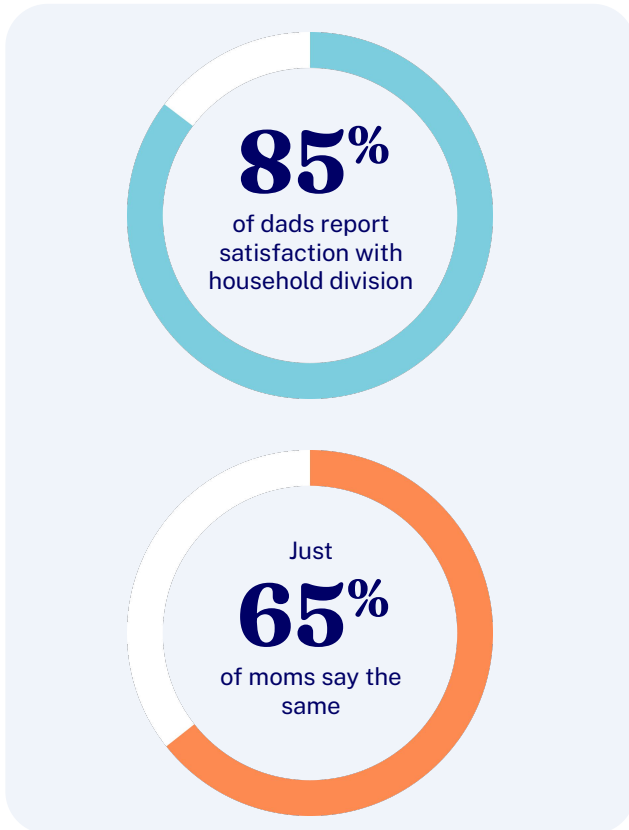
She is not broadly sustainability-driven. She is selectively protective.

That distinction matters.

Broad portfolio-level sustainability messaging is less likely to resonate than category-specific safety and ingredient claims in the moments she cares about most.

Creative strategy matters just as much:

The traditional “happy modern family” narrative does not land equally across parents.



That gap creates creative risk.

Messaging built entirely around seamless family harmony may resonate more strongly with dads, while feeling disconnected from many moms’ lived reality.

Higher-trust creative:

- Acknowledge friction
- Recognize invisible labor
- Speak to the parent often holding the system together
- Reflect real household complexity

Brands that honestly mirror modern parenting realities, rather than idealized versions of them, are more likely to earn deeper trust from the parent audiences driving more of the day-to-day purchase behavior.



Methodology

This study was conducted by Moonbug Entertainment in 2026.

Phase 1: Qualitative Research

- In-depth qualitative interviews with U.S. parents across diverse demographic backgrounds
- Conducted in **February 2026**

Phase 2: Quantitative Research

- Online survey of **N=1,000** U.S. parents ages **18-45**
- All respondents had at least one child ages **0-9** living in their household
- Fielded in **March 2026**

Sample Design

- **500 Gen Z parents** (ages 18-29)
- **500 Millennial parents** (ages 30-45)
- **499 fathers**, deliberately oversampled to support robust generational x gender subgroup analysis

Weighting & Analysis

- Total sample statistics are weighted to U.S. Census natality benchmarks across:
 - Age
 - Gender
 - Ethnicity
 - Region
- Generational and Gen x Gender subgroup analyses use unweighted data to preserve the integrity of the intentional oversample design

Margin of Error

- **+/-3.25%** at the **95% confidence level** for the total sample

Important Notes

- Household dynamics are analyzed by respondent gender
- Parents across multiple household structures are represented
- Same-sex households are not separately broken out due to sample size limitations
- Findings related to household labor division and satisfaction reflect broader directional patterns and may not apply equally across all household configurations

Race & Ethnicity

- Additional racial and ethnic groups are represented in the full sample
- Only groups with sufficient sample size are broken out separately for reliable subgroup analysis

Study Lead

Johanna Moscoso
 Director of Audience Intelligence
 Moonbug Entertainment

