



# Beyond 17

THE REAL TRUTH ABOUT BRITISH YOUTH

Channel 4 research report  
February 2023

# Everything you've been told about Gen Z is wrong

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Chief Executive's Introduction

# What does it feel like to be young in Britain right now?

More specifically, what does the future hold for those aged 13 to 24-years-old? We have been carefully thinking about this for several years. It's vital for us – all of us – to understand them.

**Alex Mahon**  
Chief Executive Channel 4

**We live in an age of classification and I am not sure it's helping any of us.**

But really, if you want to know about people in a way that actually matters, you need to know who they are, not what they are – which is a whole lot harder. And that is especially so with Gen Z.

This is a group of people that in my view we need to know about. When I say 'we', I do mean 'we' at Channel 4; but I also mean 'we', the population of the United Kingdom, whether we are those who are their parents or their teachers or their workmates or their Government.

We should know about them not because we want to judge or make friends or sell things to them – although we might want to do all of that – but because they are our future, and we are theirs.

If you think about it, humans rely on the conduct of older humans when they are young. Do you want to interact based on guesswork – or do you want to find out what motivates them, what matters to them, what they believe and what they do not believe, what they like and dislike, value and discard, laugh about and laugh at, cry for and cry over?



**We should know about them not because we want to judge or make friends or sell things to them – although we might want to do all of that – but because they are our future, and we are theirs.**

At Channel 4, we want to understand all of the above. Gen Z is composed of eight million Britons today – and they are our future. In just the same way that the young people of previous generations were once our future – those who grew up with the likes of *The Tube*, *TGI Friday*, *Don't Forget Your Toothbrush* and *Comic Strip Presents* in the 80s and 90s.

Channel 4 has always been the broadcaster that seeks to understand our youngest adults – that relies on their attention. We are here for them now, as we have always been – and we need to understand them to do that.

This research was born out of the fact that we decided to know them better. Working with our research partner, Craft, we commissioned a new and highly detailed survey called Beyond Z. The research included more than 1,500 people in cohorts of both 13-24-year-olds and over-25s, from across the country. We conducted focus groups and held a conference in November 2022.







# They have the potential to ignore us or embrace us



The research tells us that they are not of one single mind, but of many. They are not all 'woke'. They are not all angry. Or scared of the future. Or fussed by it. Or unfussed.

If you read on, you will find out what you need to know about this amazing generation: a generation of hope, despair and expectation, a generation that feels love, anger and indifference, a generation that cares about its own destiny as much as any generation has ever done, with a sense of foreboding and an enormous feeling of optimism and power.

I believe you will read this and realise the power of their potential. Because these eight million young people have immense potential. They are the next generation of viewers who find the programmes we make and the news stories we tell and the dramas we unfold on a whole different set of platforms. They will find us on YouTube and TikTok and on a mobile or a tablet or that old school, rectangular box with the big screen in the corner of the room that they share with others.

There remains an urgency for improved personalisation and ease of discovery so audiences of all ages can easily find trusted and safe media sources. Our industry needs to ensure we're doing everything we can to allow young people easy access to content that matters – matters to them and to the society they are part of – and that we reduce the number of steps it currently takes them to find PSB content.

Research like this can help us to make choices about where we invest for tomorrow. By 'knowing' this generation better, we're more equipped to tap into their interests, hold their attention by covering what matters to them, and create opportunities to report on what engages them.

**Alex Mahon**

**Chief Executive** Channel 4

# What the research says

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01

# The same... just different



Generation Z are often portrayed as a homogeneous, amorphous mass – a demographic united by liberal politics, strident activism, and an obsession with social media fame; a group fundamentally different from those which came before them. The reality is far more nuanced.

## 01 The same... just different

## Channel 4 research report Beyond Z

Google the term 'Generation Z' and you'll find a bewildering array of claims and assertions about this demographic. They're all woke; they all have a side-hustle; they're a generation of climate activists; they're radically different from the millennials who came before them, and a different species compared to their parents.

Our research singularly failed to replicate these findings. While age does drive difference between generations, it is not the most important factor. Given the huge socio-demographic diversity of people aged under 25 compared to those aged over, talking about Gen Z as a single, homogeneous group is very difficult and frequently, nonsensical.

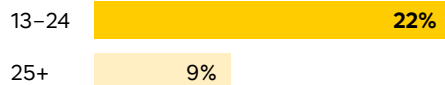
It would be an absurdity to try and stereotype a group of eight million people. Income and education are most important when it comes to explaining in-group differences. Put starkly, young people born to well-off parents will have very different lives to those born into less-well-off families.

Like all of us, they are a bundle of contradictions. Just as there is a broad spectrum of views across the voting population, this is reflected in Gen Z as well. There are wide pluralities of experience, attitudes, interests and identities – they are not generally activists or overly conscious consumers and older people's expectations of them – for instance, that they should be consistent in making ethical choices – are unrealistic.

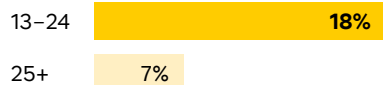


Talking about Gen Z as a single, homogeneous group is very difficult and frequently, nonsensical.

### Ethnically diverse background



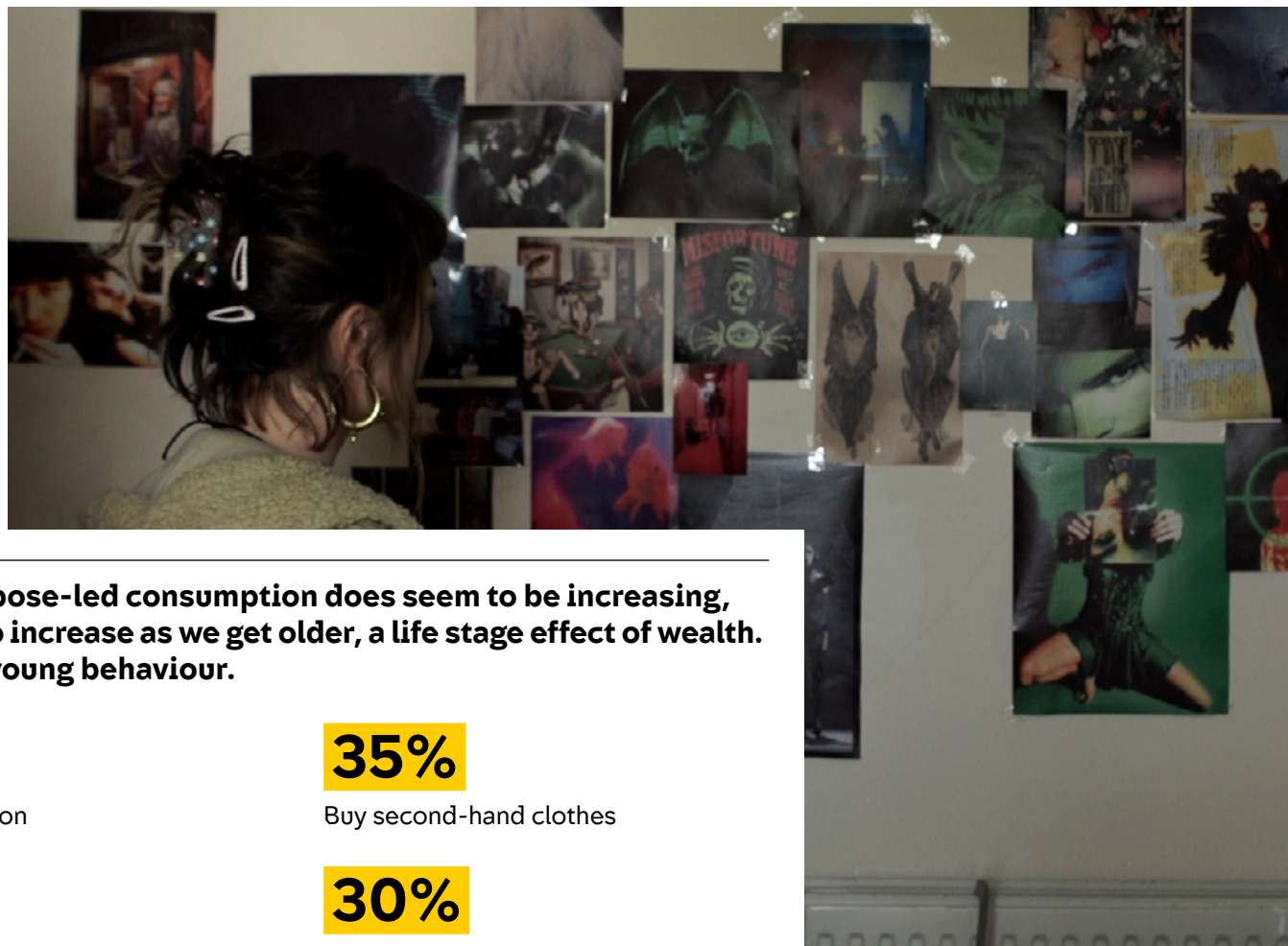
### Identify as LGBTQIA+



Source: Craft (2022), Beyond Z







**While purpose-led consumption does seem to be increasing, it seems to increase as we get older, a life stage effect of wealth. It is not a young behaviour.**

**66%**

Buy fast fashion

**35%**

Buy second-hand clothes

**66%**

Buy products in disposable packaging

**30%**

Pay more for environmentally and/or socially responsible brands  
**whilst over two-thirds do not**

**49%**

Fly for holidays/leisure  
(60% ABs, 32% DEs)

### The rise of the YIPs (Young Illiberal Progressives)

Gen Z are more progressive people in that they support the freedoms won by earlier generations, who changed social attitudes towards issues such as sexuality and equality. They are significantly more progressive than their parents and even than millennials on some issues – for instance, only 48% of Gen Z believe there are just two genders, compared to 64% of over-25s.

But young people could be said to be less liberal because they are less tolerant of the views of others than their parents and grandparents. It is also a rational reaction to the digital age. A quarter of Gen Z say they “have very little tolerance for people with beliefs that they disagree with”. These young, illiberal progressives don’t believe in unrestrained free speech, with nearly half agreeing that “some people deserve to be cancelled”.



We should be less judgy of others and the choices they make, because it just adds to the mounting stress.

Joe 21, Halifax, West Yorkshire

02



# Hey, boomer!

From the climate crisis, through toxic masculinity to the impossibility of getting on the housing ladder, the popular picture is of a generation more at loggerheads with their elders than any other.



# The popular view of Gen Z is that, on any given subject, they're in conflict with older generations.



The key intergenerational issue creating tension today is around social media. There is a huge amount of misunderstanding and misconceptions by older generations about how young people use social media and devices.

Yes, there have always been tensions between generations – but these tend to be over-stated and simplistically presented as us-and-them dynamics. For instance, Gen Z aren't really sure when asked which generation has had it best – only 26% say baby boomers, compared to 53% of people aged over 25. Conversely, nearly a third (29%) are unsure which generation has had it the worst. Around a quarter of Gen Z (23%) think they've been hardest done by, but the same proportion of millennials think that their generation had it worst.

Tensions are exacerbated today by young people and older generations having less contact than they used to, in part driven by geography: more young people living in cities and more older people living in rural areas. The key intergenerational issue creating tension today is around social

media. There is a huge amount of misunderstanding and misconceptions by older generations about how young people use social media and devices – a classic example of older generations projecting their dislike for behaviours that simply did not exist when they were at the same age as their children (find out more about the impact of social media on p20).



Even though I spend a lot of time with my friends and enjoy it, obviously family is much more important at the end of the day.

**Hamza** 24, Birmingham

## Older people are often inspiring role models

Which, if any, of these are inspiring role models for you?

Parents

**30%**

Grandparents

**24%**

Teachers

**22%**

Sports stars

**14%**

Celebrities

**11%**

Influencers

**7%**

Plenty of the young people that we met live in multi-generational households with extended families. The younger people we spent time with generally like and respect authority figures and older people in their lives, be they teachers, colleagues or older friends.

Ultimately the battlegrounds presented in the popular press – for instance, gender and racial inequality, climate change and human rights abuses – are more likely to be seen as societal problems, rather than issues where responsibility lies with one generation or another, although a significant minority of Gen Z (24%) do hold previous generations responsible for discrimination against the LGBTQIA+ community, signalling that one of the biggest generational divides remains around issues of identity politics and the rights of minority groups.



The people who have suffered because of inequalities made it all worth it, so we can be who we want to be in the present day.

**Rocco** 15, Epping, Essex

## Who's responsible for big issues?

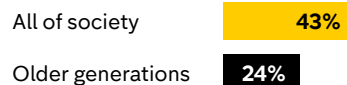
### Gender inequality



### Climate change



### Discrimination against LGBTQIA+



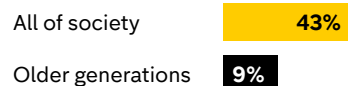
### Increases in mental health issues



### Racial inequality



### Human rights issues



Source: Craft (2022), Beyond Z





03

# Work and play

While Gen Z are emerging into a challenging socio-economic context, it's not all bleak. They approach their future as you might expect young people would – with optimism, curiosity, experimentation, and creativity.

### More mild than wild?

We're often told that Gen Z are less fun-loving than previous generations – this is a long-term trend.

When compared to millennials of the same age, Gen Z drink less, engage in less sexual activity and commit less crime, while consumption of recreational drugs is stable.

This might not be a fundamental attitudinal shift, however. Evidence suggests that these declines are driven more by the effectiveness of barriers that prevent 'bad' behaviour.

This generation has been shaped by near constant societal upheaval – from the financial crisis of 2007/2008, through Brexit uncertainty to the pandemic, war in Europe and the current global recession.

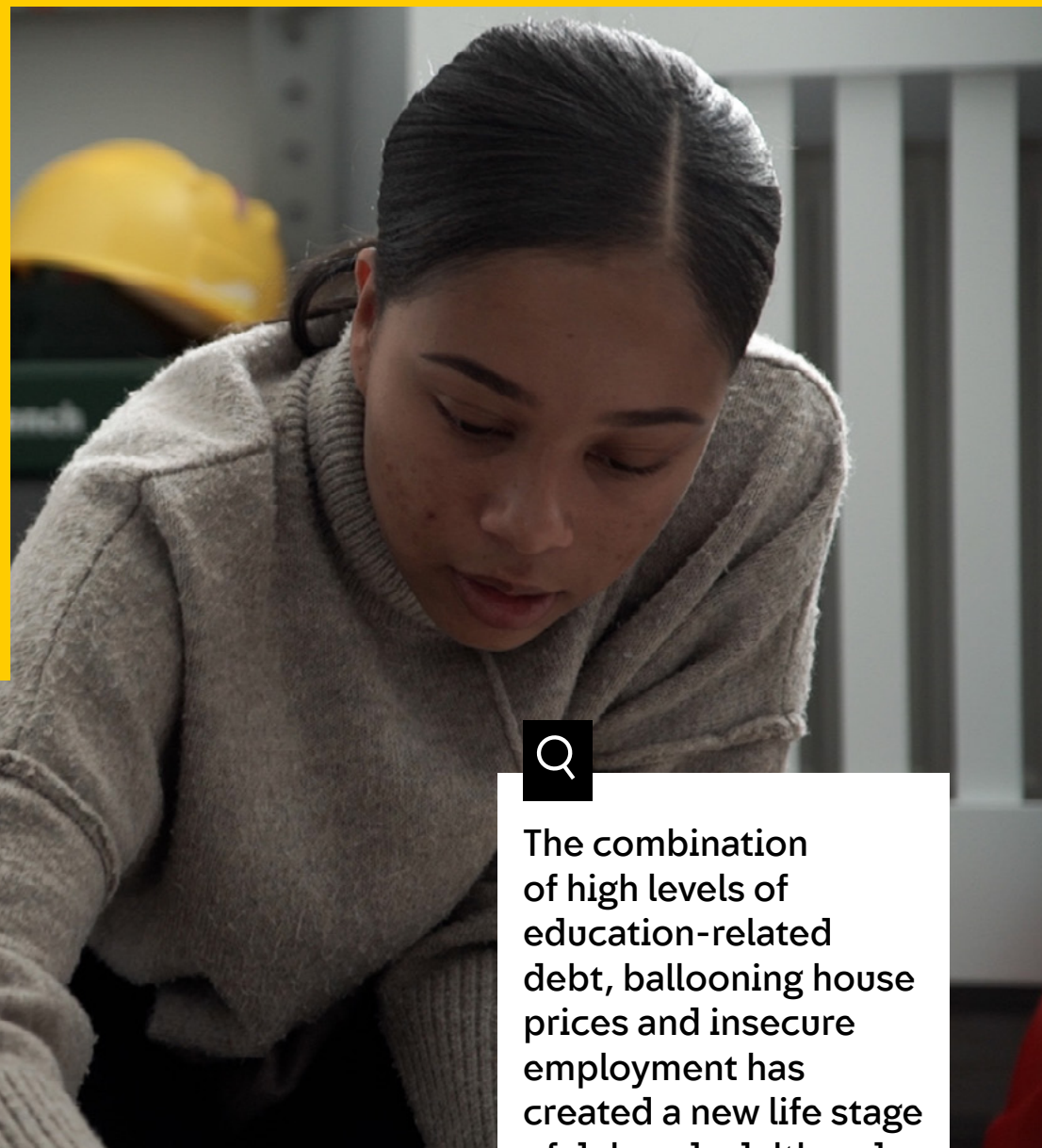
These teens and young adults are coming of age in a society grappling with the toxicity of institutional racism and sexism and the contested collapse of traditional ideas of gender and sexuality. Phew.

Education is expensive and work is insecure – Gen Z are three times more likely to be on zero-hour contracts than the general working population and 16-25s were more than twice as likely to have lost their job because of Covid-19.



I'm having to pick up more and more hours at work to compensate for the rise in living costs, but I can't juggle everything at once.

**Amelia** 24, Truro, Cornwall



The combination of high levels of education-related debt, ballooning house prices and insecure employment has created a new life stage of delayed adulthood.



The combination of high levels of education-related debt, ballooning house prices and insecure employment has created a new life stage of delayed adulthood. This has not been seen in previous generations.

Young people are staying at home longer than ever before. This has several effects, notably on decreasing feelings of independence and slower transitions into long-term relationships and parenthood. First sexual experiences and marriage are happening later, the latter more likely to be a validation of a long-term relationship than the start of one.

It's not all bleak, however. Young people who are not living in deprivation are exactly what one would hope and expect them to be: fun-loving, social, curious, experimental, creative and innovative. They have a whole lot of fun – there's an obvious proliferation of leisure activities available to them at a time when they have fewer obligations and responsibilities.



Sometimes you think about it and it's just, like, what's the point? You're never going to get the money and all this craic. I haven't even applied for a course yet because I'm so worried that I won't get money, that they'll just reject me straight away.

Eimear 21, Newry, Northern Ireland

### What's your side hustle?

The side hustle is often presented as an example of a combination of Gen Z's alternative approach to employment and innate entrepreneurialism. With only 32% of young people claiming to have one, the research suggests that, in an increasingly insecure economy, side hustles are a needs-must solution to temporary problems, rather than a choice.



04

# Pessimistic, optimistic and realistic

Gen Z are not as confident about *the* future as they are about their own futures. Most young people are happy and optimistic that they can make the life they want, but maybe not change the world.



# What matters most to Gen Z



**53%**

Having good friends



**51%**

Mental health

**50%**

Doing well in their studies

**25%**

Climate change

**22%**

Human rights

**15%**

Ending poverty

**14%**

Gender inequality



The challenging context into which young people are emerging has made them pessimistic about the future, particularly society's ability to solve macro issues to solve macro issues like a more peaceful world (43% pessimistic vs 27% optimistic); addressing climate change (38% pessimistic vs 27% optimistic); and making the world economically fairer (39% pessimistic vs 26% optimistic).

They remain optimistic about the future in spheres where they have more control – they're confident they'll live happy lives (53% optimistic vs 21% pessimistic) and achieve their personal goals (52% vs 21%).

This generation is the first to be brought up by parents who grew up in a neo-liberal world. This, combined with a hyper-competitive education system has led to Gen Z putting a lot of pressure on themselves to succeed.



I've always had dreams of being an actor, singer, something in musical theatre. My more achievable goal is to be a dentist, but if I end up being an actress by accident, then why not!

**Isabelle** 15, Wakefield, West Yorkshire

**Young people are much more optimistic about *their own futures* than *the future***

**66%**

Pessimistic about the future of the world

**41%**

Feel empowered to influence the future of the world

**61%**

Feel empowered to influence their future

**40%**

Pessimistic about their future

**60%**

Optimistic about their future

**34%**

Optimistic about the future of the world



**Most of their aspirations are standard and close-to-home, not global and revolutionary.**



**67%**

Would like to buy a property

**57%**

Would like to get a full-time job

**52%**

Want to get married/ enter a civil partnership

**10%**

Want to become an influencer

**3%**

Say contributing to society is a life goal



But despite the persistent narratives around 'changing the world' and wanting to be social media influencers, most of their aspirations are standard and close-to-home, not global and revolutionary. They want good friends (53%), resilient mental health (51%) and to do well in their studies (50%). Ending poverty and righting gender inequality are much lower ambitions (15% and 14%, respectively).

Activism is very much a behavioural and attitudinal outlier for this generation. Only 3% agree that 'contributing to society' is a life goal, compared to 67% who want to own a property and 57% who want to get a full-time job.

05

OUTH



# A fine balance

Young people are ambivalent about the digital world – it has its costs and benefits – and they believe they’re adept at balancing both these and their virtual and real-world experiences.



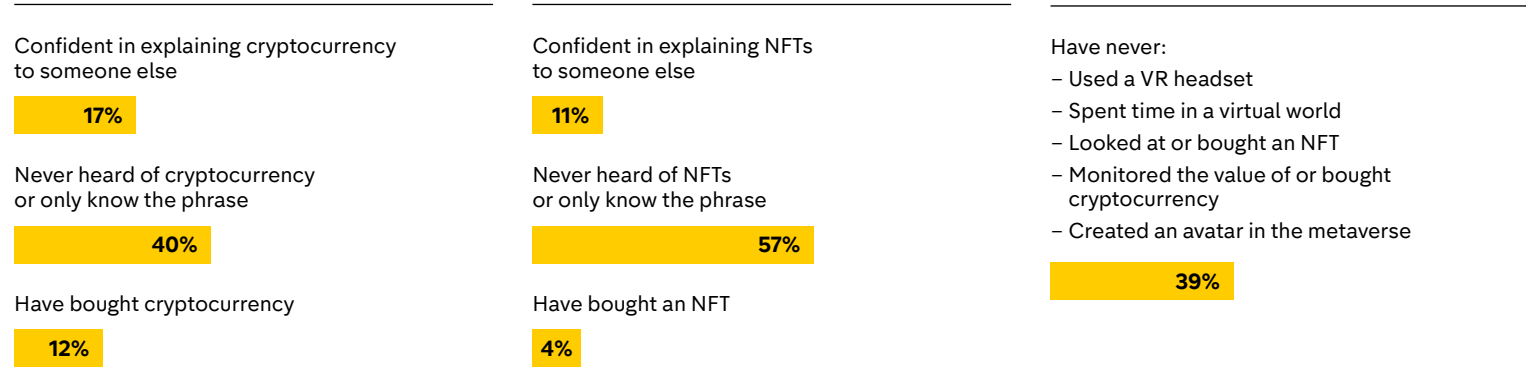


The digital world is perhaps the most contentious area of young people's lives – often because of the discourse that surrounds it, rather than the realities of how they experience it.



While Gen Z are more likely to agree that access to the internet is a fundamental human right (71% vs 61% 25+), they are not as cutting-edge as some might think – only 17% would feel confident in explaining cryptocurrency to someone else and only 9% could do the same for NFTs. More than one in four have never even heard of the metaverse.

It goes without saying that these young people are 'digital natives'. What's more influential is the type of internet that they've grown up with. Social media and the internet brings a raft of benefits and potential pitfalls.



## Social media and body image

A major downside of social media is the effect on body image. 80% of 16-17-year-olds say that appearance is very important to them, with girls more likely to feel pressure and be unhappy about their appearance. Nearly a third of girls in our research said they were obsessed with getting likes on social media.

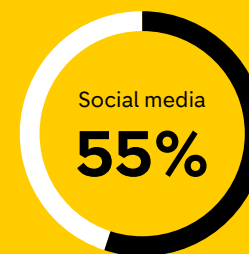
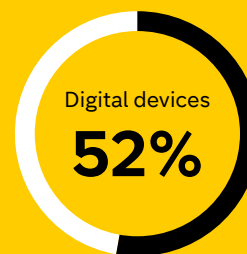
A half of Gen Z (rising to 62% of females) say they feel pressure to be skinny, while 43% males report pressure to be muscular/big. Nearly half (45%) say that their physical appearance is influenced by what they see on social media and a similar number say they've compared their appearance to those of celebrities. However, the same number (44%) say that seeing body positive images on social media has helped them to accept their body as it is.

Here lies one of the biggest generational divides unearthed in this study. Like rock 'n' roll, television, and computer games before it, social media has become a classic intergenerational battleground.

Gen Z believes that its elders do not understand their ability to control interaction on social media. Older generations hold social media responsible for the growing mental health crisis among the young – 50% of them believe that it's the major cause of stress for young people; Gen Z doesn't lay the blame at big tech's door – only 35% of them identify it as a cause.

For them, it isn't even in the top five stated drivers of stress. Social media does have some negative impacts on young people's lives, of course, but they don't see it as a major cause of poor mental health because they believe in their power to turn it on and off. Ultimately, their perspective is that being paid fairly and owning a house are more likely to drive happiness than what they're seeing on TikTok.

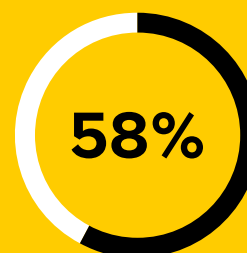
## Young people think older people don't 'get' how they use digital devices and social media



## 50% of over 24s think social media is the main reason for poor mental health among young people



## 58% of 13-24s, however, think older generations worry too much and exaggerate the effects of social media





**The mental health time-bomb**

Sadly, the talk of a mental health crisis among young people is not a myth. Almost half Gen Z report experiencing some form of mental health problem and similar numbers (46%) state that their mental health had worsened during the pandemic.

The causes of this crisis are complex, though the trend in young people’s happiness and confidence in their mental health has steadily declined since 2009. And while the downsides of social media – loneliness, unrealistic expectations, cyber-bullying – inevitably contribute to this trend, the big socio-economic issues, global uncertainty and pressures around education, work and money are having the biggest impacts on Gen Z’s mental health.

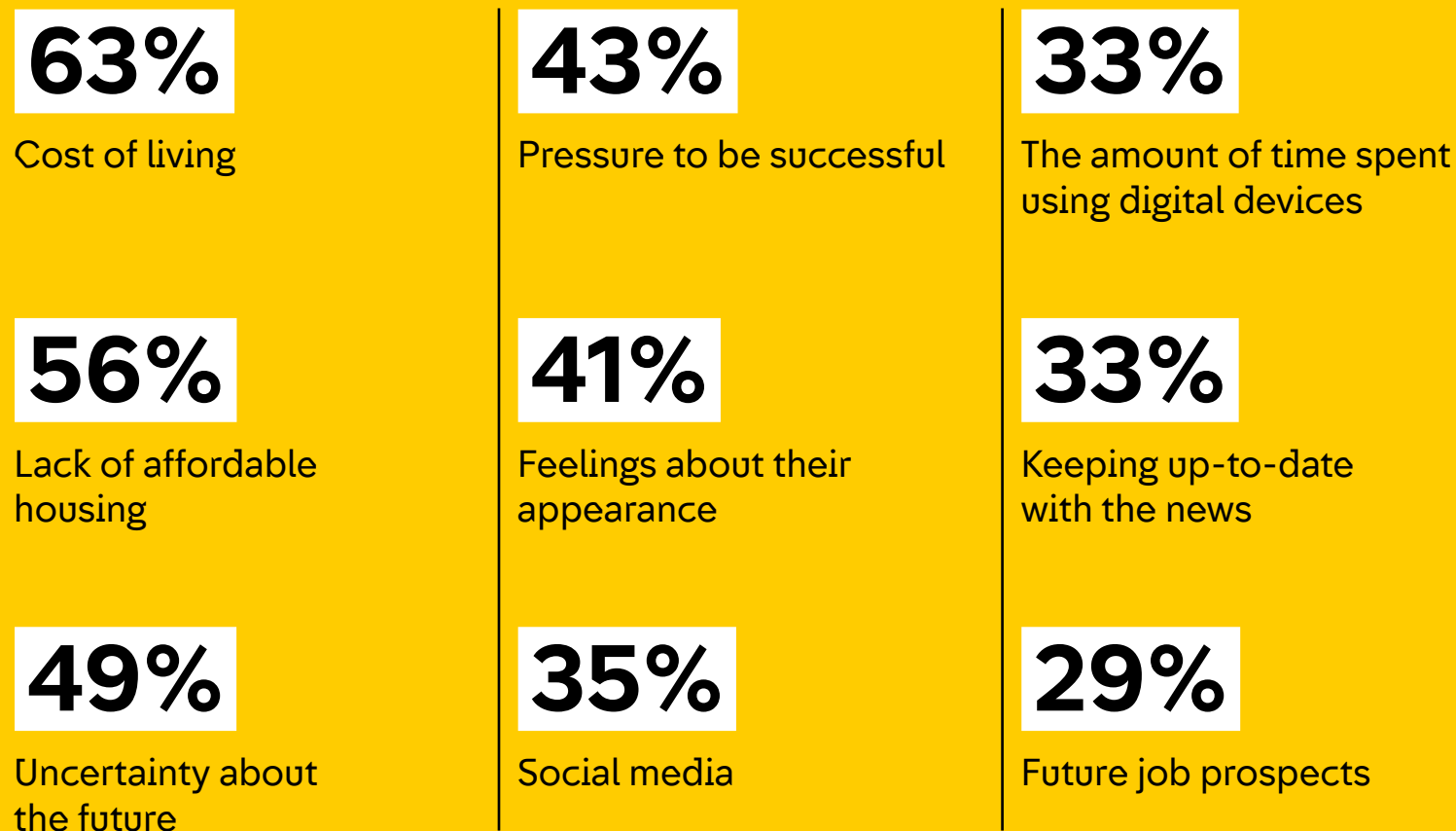


I’m quite a shy person. Since Covid, I’ve gone back into my shell a little and I have a bit of social anxiety around that.

Helena 15, Burnley, Lancashire

**Big socio-economic issues, uncertainty and pressure are seen to be the biggest negative impacts on mental health**

Percentage agreeing ‘this area has a negative impact on my mental health’



06



# Screen lives

Although TV viewing is lower for younger people, TV – and its broadcasters and producers – still has a role to play in their lives.



# The press likes to portray young people as a generation lost to 'traditional' broadcasters.



I don't see (Channel 4/Altogether Different) as left-wing because it's a fact: we are all different and we should celebrate those things. It's not even really political, it's just a truth. We're all different and we should accept that and embrace it.

Hugo 17, Beaconsfield

It's true – young people are watching less television than they used to, but this is part of a long-term trend and it's true for all demographics, not just Gen Z.

Screens – particularly mobiles – are hugely important to young people. They watch nearly five hours of content a day, and 30% of this is broadcast content (a combination of live TV, recorded playback and broadcaster VOD) – five minutes more than the time they spend watching SVOD content from the likes of Netflix, Disney+ and Amazon.

Everyone we spoke to in our research watched some broadcast TV – young people value it because it's an experience which bonds them to others; immersive-yet-passive in a world that often demands active interaction and participation from them.

With the UK's biggest free streaming service, Channel 4 has a stronger relationship with Gen Z than any other public service broadcaster. Its authentic, local content reflects modern Britain and Channel 4 has both the highest share of viewing for 16-24s and a much younger profile (40% younger than any PSB competitors).

Nine of the ten youngest profiling shows on the UK's PSB channels were on Channel 4 in 2021 – including *The Great British Bake Off*, *Gogglebox* and *Taskmaster* – and All 4 is the youngest commercial BVOD player.

## Altogether Different

Channel 4's brand is heavily shaped by its remit – to innovate, represent and challenge. This resonates strongly with young people, chiming with their general celebration/matter-of-fact acceptance of difference, hybridity, and fluidity of identity. The ideas of diversity and acceptance that lie at the heart of the brand – and its Altogether Different positioning – are, however, concepts that young people take as givens, with only a minority actually championing them.



Screens – particularly mobiles – are hugely important to young people. They watch nearly five hours of content a day, and 30% of this is broadcast content – five minutes more than the time they spend watching SVOD content.

# 07

# Wrapping it all up

This study shows that it's hugely problematic to talk about 'them' or 'Gen Z' as one.

Gen Z might be a useful shorthand and, on occasion, talking about 'them' as a group is meaningful – there are a handful of cohort effects which are experienced by this generation far more strongly than in previous generations.

For the most part, however, our research shows that difference, nuance and complexity characterise the UK's young people much more than commonality of attitude, behaviour or experience.

Remember – they're not necessarily all that different from the people who came before them; they're not all the same, and they're not going to stay the same; and this is a time of great change and transitions, from childhood to adulthood.

Cut them  
a little slack.





# Giving Gen Z a voice



**Reaching Generation Z, and engaging successfully with them, depends on tapping into their interests and holding their attention by covering what matters most to them.**

This is an increasingly competitive landscape. We are challenged by new technologies and audience behaviours. Only by understanding how young people think can we successfully engage with them.

For Channel 4, the learnings from this research are helping to inform the choices that we make today about where to invest to make the very best entertainment, information and educational shows for young people – and, crucially, where we need to be to reach them.

Today Channel 4 is the youngest-skewing public service broadcaster. Four out of five 16-34-year-olds are registered with our streaming platform All 4 and we reach more young people than any other commercial broadcaster's on-demand services. Our push to digital has made Channel 4 a real destination for young people today and our Leeds-based 4Studio business is successfully creating bespoke social content aimed at Gen Z. But we are not standing still. We know we must do more to actively seek these audiences.

By integrating this research into our business, we can continue to be the TV and film company that 'gets' young people. Truly knowing what it is like to be young in Britain today can help us – as well as help our creative and commercial partners.

There is a clear value for public service broadcasting for all generations, but especially Gen Z – knowing what information to trust and to believe is not easy. As an industry, we need to ensure that we do all we can to allow young people easy access to content that matters – and to reduce the number of steps it takes them to access this trusted content.

Young people need to know that they have a voice in national debates if they are going to contribute to solving national problems. This is why Channel 4 recently launched Untold, our brand new, youth-orientated current affairs strand. It has the same remit-defining, noisy and bold journalism of Dispatches, but is focused on younger viewers and subjects that matter to them.

We are already engaging with a wide range of brands and agencies that are making good use of these findings. But at the heart of this research is that young people recognise its validity and accuracy. This is allowing us to give Gen Z a voice and to help elevate that voice, ensuring that older generations better hear and understand young people.

# Beyond Z was launched at a conference in November 2022

Panels and speakers discussed the key themes to dive into the research.



Demographic metabolism keeps society fresh. If you didn't have the tension between younger and older generations, then society probably isn't changing enough. Younger generations are the ones that move us forward.

**Professor Bobby Duffy**

Professor of Public Policy and Director of the Policy Institute, King's College London



Even though the stress of uni is gone, there's now a stress of sorting out what I'm doing for the foreseeable future – that's the biggest challenge right now.

**Joe** Beyond Z panel member



If one of my articles ends up on Facebook, I know it's game over. Older generations are starting to use social more, like how my generation did as teenagers.

**Yasmine Benoit** Model and asexual activist







What gives me hope is the passion I see from young people to want to make a difference. Not just wanting to get into politics, but influencing their communities, influencing peers, influencing their parents. Young people are the leaders of today and they are making change.

**Jo Hobbs MBE** CEO of The British Youth Council



Not every young person struggles with their mental health. With the right support, most people can overcome challenges they face.

**Chris Martin** CEO of The Mix Charity



Mental health is the biggest problem in society today. It affects every person differently, especially in my generation.

**Hunni** Beyond Z panel member



Social media has helped me become aware of how I think and find people similar to me. I am not disabled, I learn differently. I don't have a learning disability.

**Amelia** Beyond Z panel member



# Research methodology

**Beyond Z is the result of research conducted by Craft Strategies and Channel 4.**

It combines extensive background and desk research; a series of interviews with highly regarded youth experts; two nationally representative quantitative research studies among 1,500 people in cohorts of both 13-24-year-olds and over-25s; interviews with experts, each with a unique take on contemporary youth culture; and extensive ethnographic and qualitative research among a sample of 37 young Britons from the length and breadth of Great Britain and Northern Ireland.

Data from these methodologies was analysed by Craft Strategies and its founder Konrad Collao using a process called synthetic cohort analysis – an approach which seeks to establish the interplay between life stage effects – where change occurs in predictable ways as people age; period effects – consistent changes in attitudes, beliefs and behaviours of a society across different demographic groups, often in response to major events; and cohort effects, where an age group does have different attitudes and behaviours to other groups.







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