

Britainthinks

—— Insight & Strategy ——

The Kids are Alright

How Gen Z feel about their nation, their prospects (and their parents)

October 2021

We put the people that matter most at the heart of our clients' thinking.



We work across the public, private and third sectors



1. Background

Born after 1997, Gen Z are now young adults. It's predicted that by 2030 Gen Z will...



Make up **1/3** of
the global
workforce



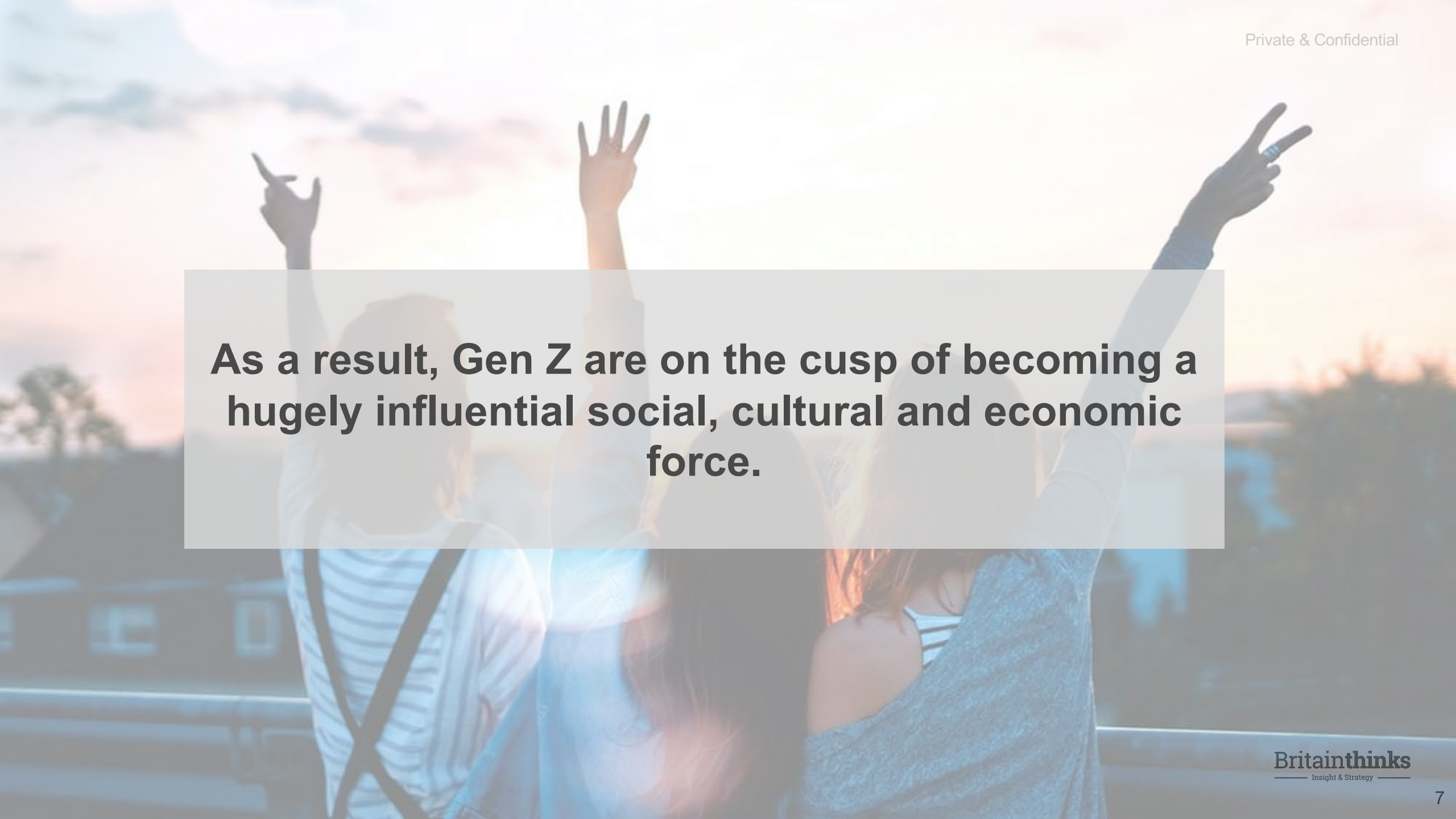
Have **\$3.5 trillion** of
disposable income



Be responsible for **\$3 trillion** of consumer
spending

Gen Z are true 'Digital Natives', they are the same age as Google. Seven years older than Facebook.

*Oxford Economics, 'Gen Z's role in shaping the digital economy' (Research report, March 2021)

A photograph of three young people standing on a rooftop or balcony at sunset. They are seen from behind, with their arms raised in the air, making various hand gestures. The person on the left is wearing a striped shirt and a backpack. The person in the middle has long dark hair. The person on the right is wearing a grey cardigan over a striped shirt. The background shows a cityscape with buildings and a bright, hazy sky with soft clouds. A semi-transparent grey rectangle is overlaid in the center of the image, containing the text.

As a result, Gen Z are on the cusp of becoming a hugely influential social, cultural and economic force.

2. Methodology

We conducted eight online focus groups and two surveys



8 online focus groups with 36 16-24 year olds

1st and 6th September

Spread across South East England,
North West England and Wales

Groups split by work and education
status



**Online survey with
16-24 year olds**

3rd – 8th September

Sample of 1026
nationally
representative by
age, gender and
in/out education

Online survey

3rd - 6th September

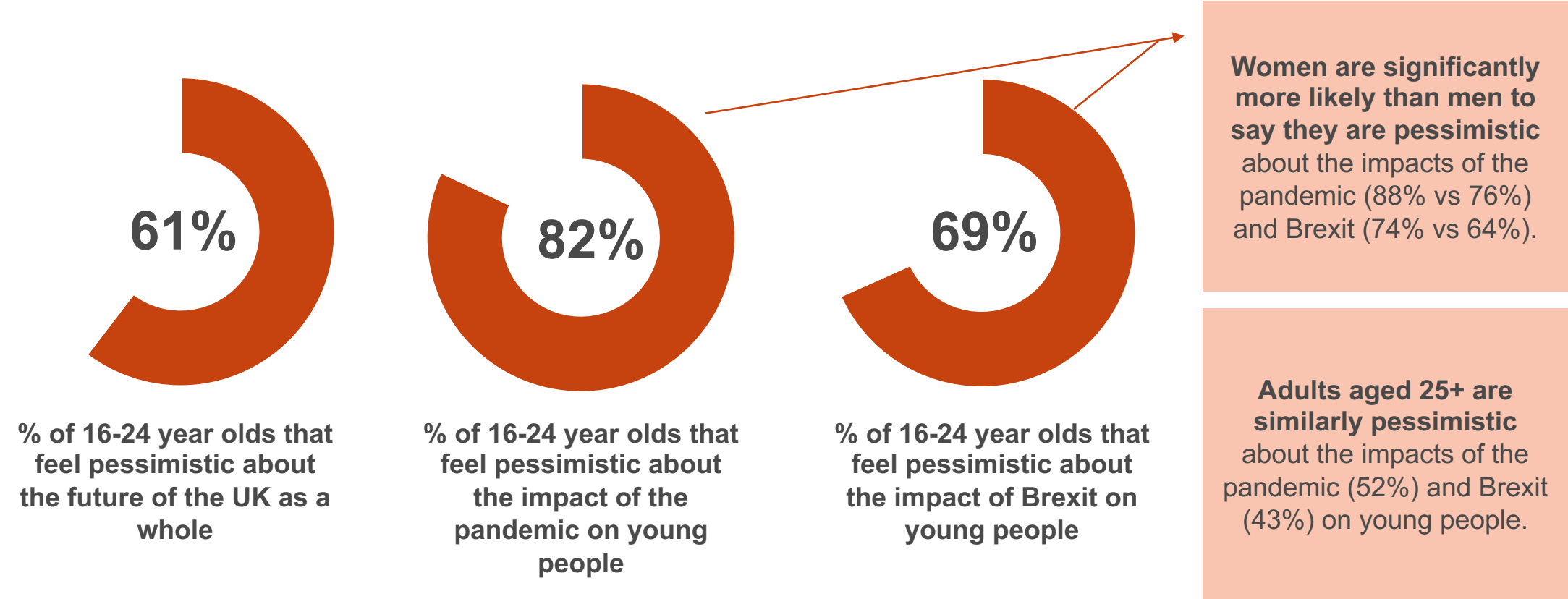
National
representative
sample of 2071

3. Key findings

- 1 **Young people feel negative about the UK.** Many feel detached from Britishness, dismayed by the country's trajectory, and fear that Covid and Brexit will only make things harder for their generation.
- 2 **Young people are optimistic for their own futures.** Most believe they will succeed *despite* the external environment. They express faith in their own positivity, resilience and capacity for hard work.
- 3 **Mental health is a critically important issue to young people,** it underpins their self belief. But over a third say they have personally experienced poor mental health.
- 4 Gen Z's ambitions feel fairly traditional (a stable job, a family). But **their expectations for flexibility suggest a very different relationship to work in the future.**
- 5 **Passion for equality issues sets 16-24s apart.** Whilst climate is a shared priority, the rights of women, ethnic minorities and LGBTQI+ people matter much more to young people than older cohorts.
- 6 **The 'culture wars' is an unknown term for most,** but young people do believe their generation's values differ from their parents' (and in particular from those of 'old white men')
- 7 **Young people feel secure in their values.** They have little desire to 'cancel' those who disagree. But they do wish to educate and feel no compunction in calling out behaviours they see as offensive.

4. How do Gen Z feel about the UK?

Covid-19 and Brexit are front-of-mind for Gen Z when thinking about the UK, leaving a majority feeling pessimistic



Q2: Thinking about the next few years, how optimistic or pessimistic do you feel about each of the following? Base: All respondents (n=1026) : Q4. Thinking about the next few years, how optimistic or pessimistic do you feel about each of the following? Base: All respondents aged 25+ (n=1852)

Their education, careers, social lives and mental health are already perceived to have taken a hit



“Obviously you feel like you're not learning as much and you're not doing as much as you should. It's been kind of discouraging in a way because obviously you want to be the best you can be at the degree you're doing and it's hard to do that when you can't do anything.”

(18-24 yrs old, female, university student)



*“I think **Brexit** has impacted me because a lot of the jobs I'm interested in are in Europe and I can't apply for them anymore because I don't have an EU passport. So that's had a really big impact on me and my friends.”*

(18-24 yrs old, female, NEET)



“At the start, it was kind of weird but you get through it because you have to but more recently you just start to realise how much you need to see your friends and the fact that you can't makes you want to even more.”

(16-18 yrs old, female, in work/training)



“Also with the whole lockdown, we all had a really rough period for our mental health and whatnot. We couldn't go to the gym, play sports and see our friends.”

(16-18 yrs old, male, in education)

Uncertainty dominates young people's feelings about the UK. With some expressing dismay at the trajectory of the country

“No one knows what they’re doing or how we’re going to get out of this situation with Covid. There’s no real certainty of what’s going to happen.”

(16-18 yrs old, male, in education)

“Just living in a place of unknown at the moment, no one really knows what’s going to happen next.”

(18-24 yrs old, male, university student)

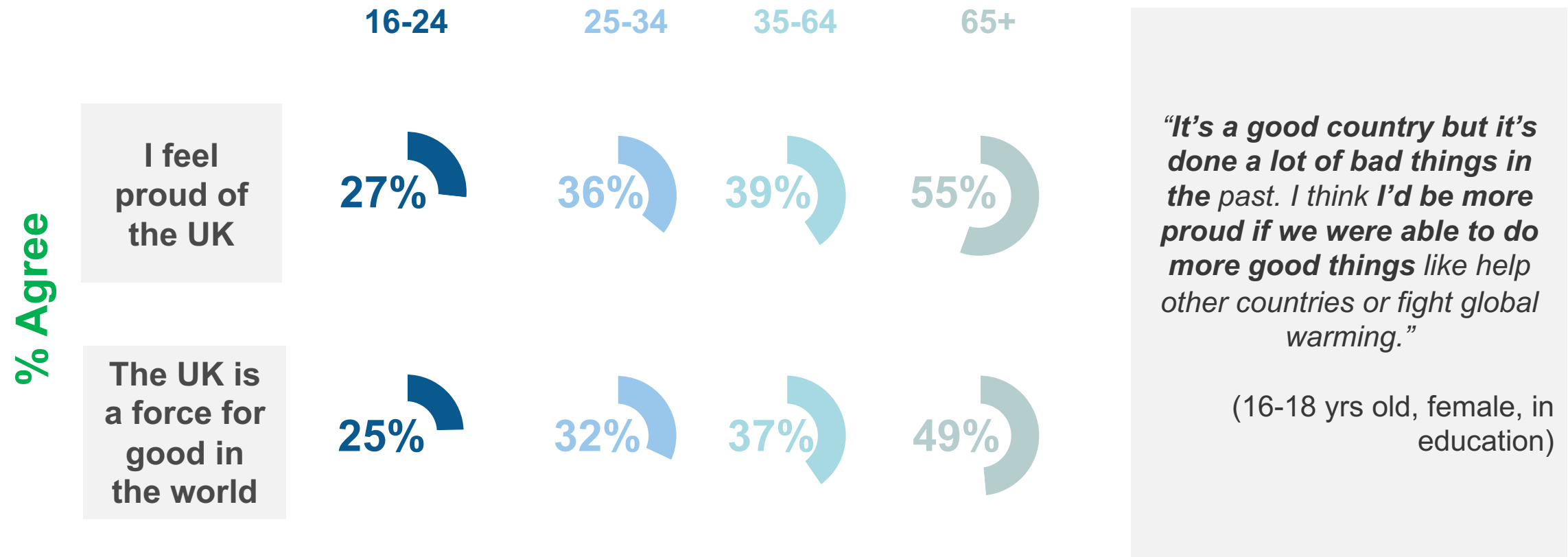
“I’m really like happy and glad that things have opened up again, because I think like we’ve been waiting for, like the day that things get back to normal for ages, but it is also that like uncertainty, you’re just like well what if it goes backwards?”

(16-18 yrs old, female, in education)

“Some people are a bit confused, some people are very sad... I felt that the younger generation are very confused... anyone that's young is kind of panicking thinking what am I going to do with my life, right now, because there's not a lot of opportunity”

(18-24 yrs old, male, NEET)

Many don't feel as connected to the UK as their older counterparts, and struggle to describe what British values are



Q4. Thinking about the United Kingdom as a whole, to what extent do you agree or disagree with each of the following statements? Base: All respondents (n=1026) ; Q6. Thinking about the United Kingdom as a whole, to what extent do you agree or disagree with each of the following statements? Base: All respondents aged 25+ (n=1852)

Britain is a shambolic, tragi-comic character – good natured, beset by mishaps, braving it out with gallows humour

*“The word I’d describe it is **shambles** ... The best person to relate to shambles would be Boris.”*

(16-18 yrs old, male, in education)

*“I’ll probably say someone like Chandler off Friends [sums up the current mood of the nation]. Kind of his attitude towards life. What’s been going on. **He has two sides to him... the feeling bummed side because of everything that’s been going on but there’s also the brighter side.**”*

(16-18 yrs old, female, in work/training)

*“Do you know After Life, the character that Ricky Gervais plays? He’s down but he’s also happy at the same time. **Everyone’s happy, but then everyone’s also got stuff going on.**”*

(18-24 yrs old, female, working never been to uni)



5. How do Gen Z feel about their personal lives?

Looking forward, many have fairly 'traditional' life ambitions – but where they expect to work and in what jobs, feels different



59%

see **raising a family** as one of their life goals (22% disagree)



67%

would be willing to **sacrifice some of their free time** to spend the majority of time **doing a job they find fulfilling** (13% disagree)

However...

1/3

unwilling to work full time in an office

(14% of those aged 25+ agree)

- Qualitatively, many now aim for careers as **entrepreneurs and creatives**, valuing the control and flexibility this could bring.
- There was little perceived downside to remote working. **Opportunity to learn from others was never raised.**
- **16-18 year olds** in particular often **envisaged becoming their own boss in their early 20s.**

*Pre-pandemic (2019) only 4.6% of those in employment in the UK reported working mainly at home.

Q5. Thinking about your personal life, to what extent do you agree or disagree with each of the following statements? Base: All respondents (n=1026) ; Q7. Thinking about your personal life, to what extent do you agree or disagree with each of the following statements? Base: All respondents aged 25+ (n=1852)

*A. Felstead & D. Reuschke, (2020) 'Homeworking in the UK: Before and during the 2020 lockdown'. *WISERD Report*, Cardiff: Wales Institute of Social and Economic Research.

Despite feeling negatively about the UK, most young people are optimistic about their personal lives



69%

of 16-24 year olds feel
optimistic about their lives
in general

*“And obviously I was working from home that whole time [during lockdown] which was difficult... **But I think so many other people were affected so much more negatively than that so I kind of count my blessings in reality.**”*

(18-24 yrs old, female, graduate)



52%

of 16-24 year olds feel that
despite Brexit, Covid and
the wider economy, they
will be successful

*“I think covid’s starting to settle down. Many people have lost jobs and loved ones from this. **It’s had a massive impact but I think it’s starting to settle down.**”*

(16-18 yrs old, male, in work or training)

Q2: Thinking about the next few years, how optimistic or pessimistic do you feel about each of the following? Base: All respondents: (n=1026)

Many even feel hopeful about their chances of owning a home in future, though optimism diminishes with age



16-17 year olds

26%

Feel that owning their own home by the time they're 30 is not realistic



18-24 year olds

37%

Feel that owning a home by 30 is no longer a realistic expectation for young people



25-34 year olds

65%



35-64 and 65+ year olds

68%

"Have my own house if I'm still with my boyfriend. I'd probably wait a few years to start a family until I was more financially stable."

(16-18 yrs, female, in education)

"Right now in today's climate, it's very hard for someone to do it on their own... I've agreed with my friends that once we're all ready, we're going to get a mortgage together."

(18-24 yrs old, male, NEET)

Q5. Thinking about your personal life, to what extent do you agree or disagree with each of the following statements? Base: All respondents: (n=1026) ; Q7. Thinking about your personal life, to what extent do you agree or disagree with each of the following statements? Base: All respondents (n=2071)

Gen Z look inwards for their impetus and motivation. Positivity and self belief are seen as the cornerstones of success



*“There’s only one kind of attitude that will get you places... I’m hopeful for my future I can see myself getting there but it’s not going to be easy, but worth it. **I believe I’ve got the drive and determination to get there**”*

(16-18 yrs old, male, in work or training)



*“**You’ve got to have the right mindset.** You’ve got to remember it’s tough and you’ll always be in competition but you’ve just got to get better and be passionate about it. **If you’re not passionate or don’t want it enough, I don’t believe you’ll get where you want to be.**”*

(18-24 yrs old, female, working never been to uni)



*“Quite confident because **I know I have the skills and perseverance. As long as you put your mind to it then you should be able to succeed.** If you’re not going to try there’s no point because you won’t get anywhere. ”*

(16-18 yrs old, female, in education)

Q5. Thinking about your personal life, to what extent do you agree or disagree with each of the following statements? Base: 16-24 yr olds: (n=1026) ; Q7. Thinking about your personal life, to what extent do you agree or disagree with each of the following statements? Base 25+ yr olds: (n=1852)

Mental wellbeing is discussed openly, with mental ill health seen as a widespread, challenging, fact of life

35%

of 16-24 year
olds

say they suffer from
mental health issues,
compared to

19%

of adults aged 25+

“With the whole lockdown, we all had a really rough period for our mental health and whatnot. We couldn’t go to the gym, play sports and see our friends... Different kind of negativity on younger people because they’re just in a different stage of life”

(16-18 yrs old, male, in education)

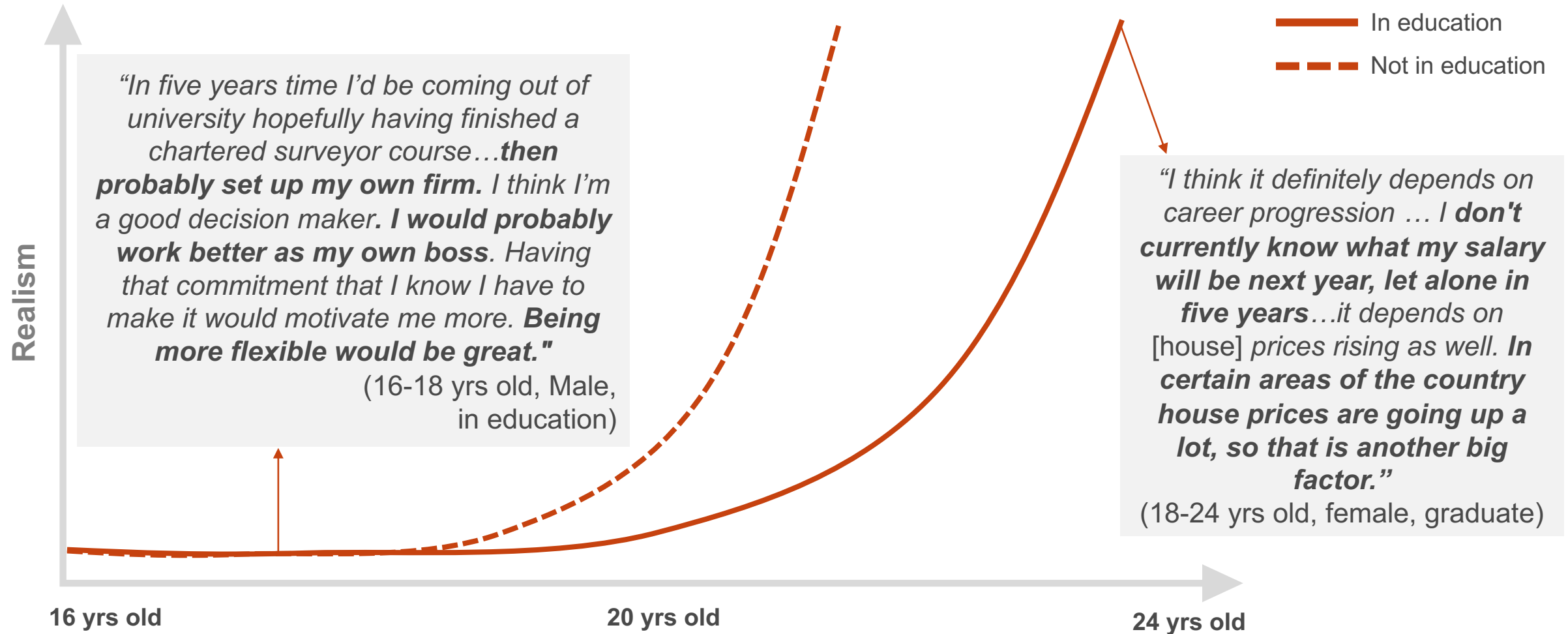
“It’s good to have a balance between work and rest. If you work too much you can suffer from burnout and it could have a negative toll on your mental health. Health is more important than wealth in the long run”

(18-24 yrs old, female, university student)

Q3. Which of these statements are true for you? I suffer from mental health issues. Base: all respondents 16-24 (n=1026)

Q5. Which of these statements are true for you? I suffer from mental health issues. Base: all respondents 25+ (n=1852)

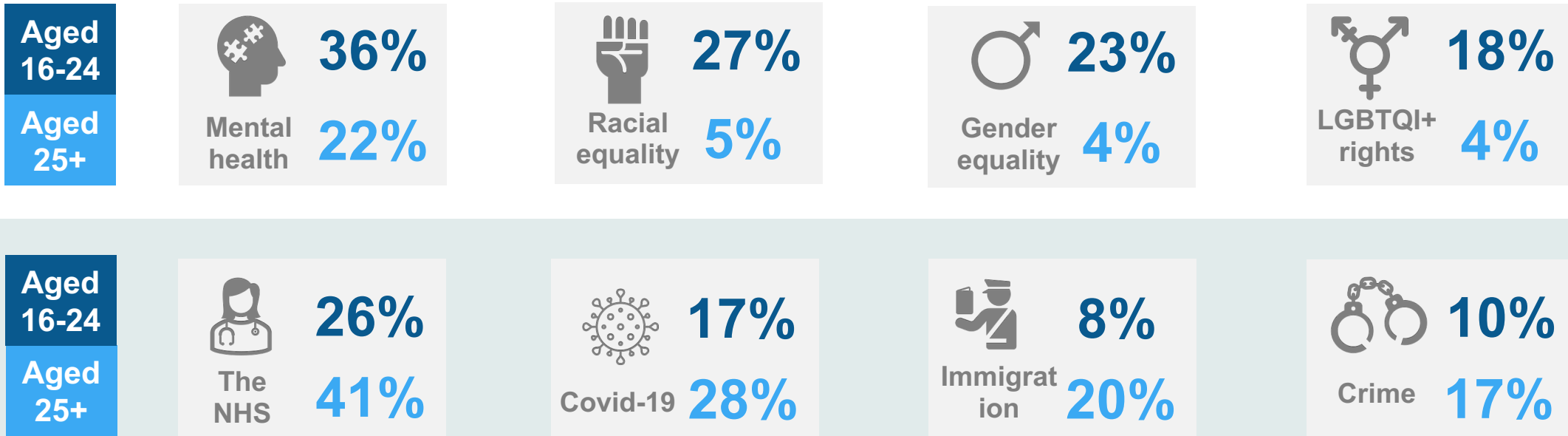
Whilst self belief was evident at all ages, Gen Z's sense of life's challenges increases as the realities of adulthood set in



6. How do Gen Z view the 'culture wars'?

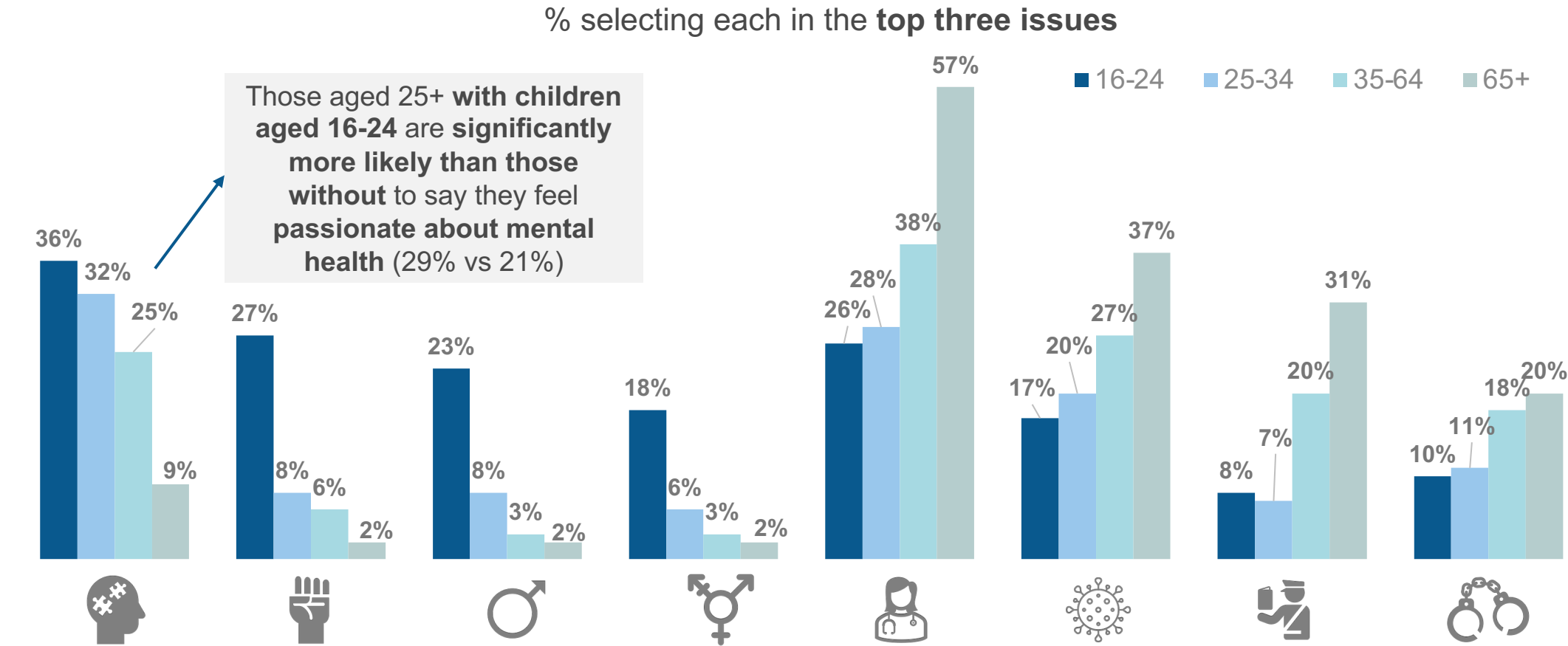
There are some stark differences between the passions of Gen Z and older generations

% selecting each in the **top three issues** they feel most strongly/passionate about
(from a list of 15 issues)



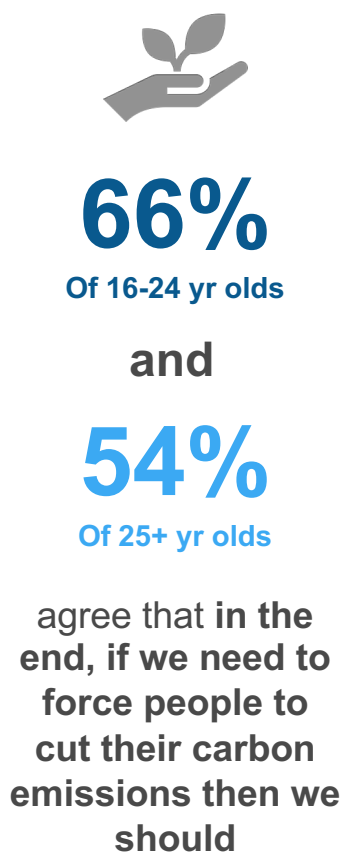
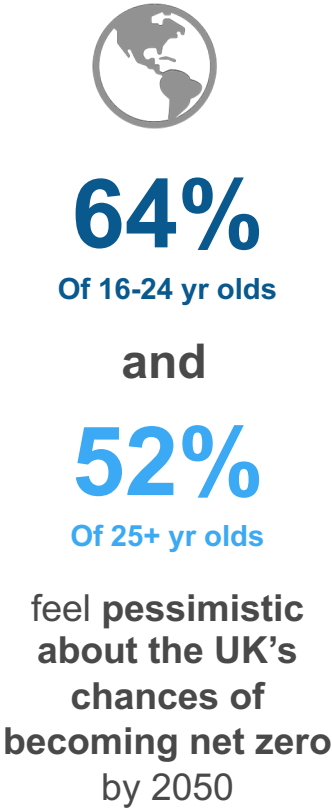
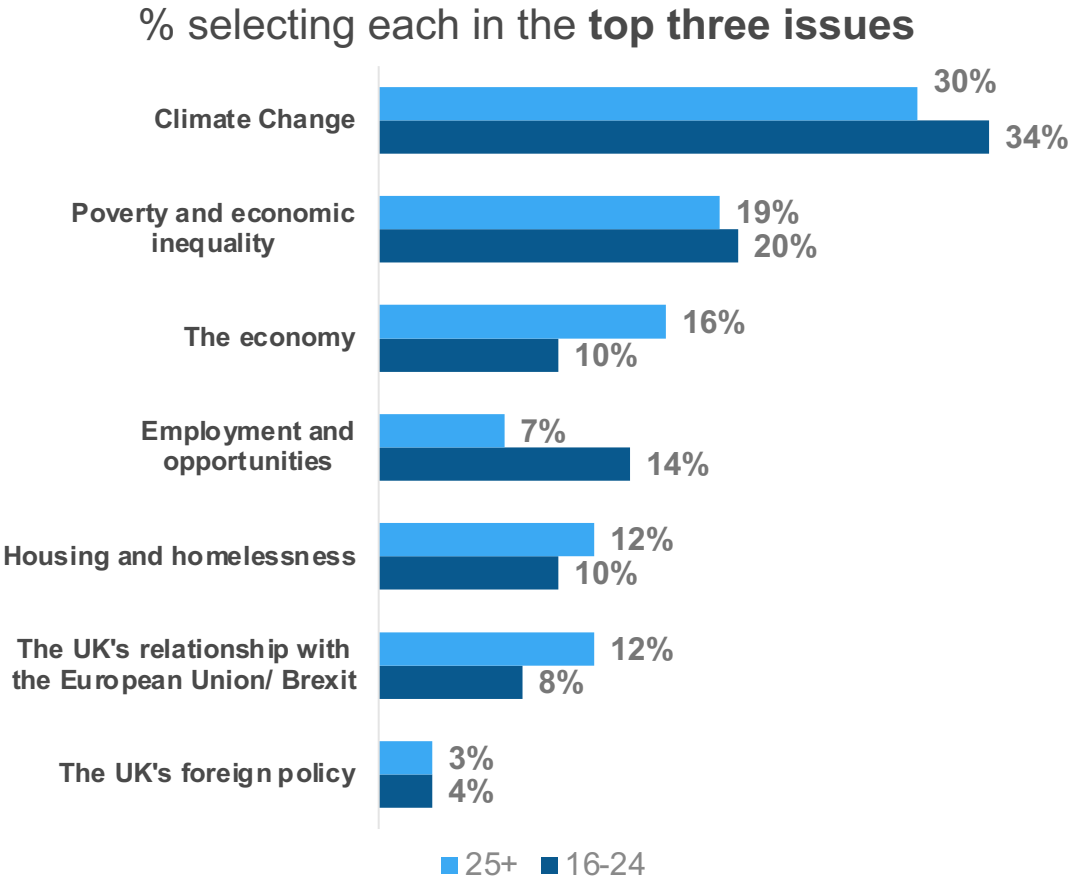
Q1. Which of the below issues do you feel most strongly/passionate about, if any? Base: All respondents aged 16-24 (n=1026) ; Q2. Which of the below issues do you feel most strongly/passionate about, if any? Base: All respondents aged 25+ (n=1852)

These differences become more pronounced with age, with the passions of Gen Z and millennials most closely aligned



Q1. Which of the below issues do you feel most strongly/passionate about, if any? Base: All respondents aged 16-24 (n=1026) ; Q2. Which of the below issues do you feel most strongly/passionate about, if any? Base: Respondents aged 25-34 (n=357), aged 35-64 (n= 1028), aged 65+ (n=467)

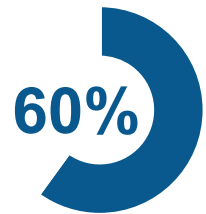
Importantly some issues - climate change, the economy and poverty - are similarly pressing for all age groups



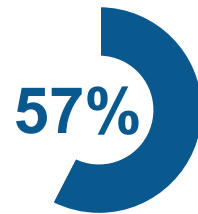
Q1. Which of the below issues do you feel most strongly/passionate about, if any? Base: All respondents (n=1026) ; Q2. Which of the below issues do you feel most strongly/passionate about, if any? Base: All respondents aged 25+ (n=1825) ; Q3. Thinking about the yr olds next few years, how optimistic or pessimistic do you feel about each of the following? All respondents aged 25+ (n=1825) ; Q2 Thinking about the next few years, how optimistic or pessimistic do you feel about each of the following? Base: All respondents (n=1026) ; Q4. Thinking about the United Kingdom as a whole, to what extent do you agree or disagree with each of the following statements? Base: All respondents (n=1026; Q6. Thinking about the United Kingdom as a whole, to what extent do you agree or disagree with each of the following statements? All respondents aged 25+ (n=1825)

Equality and advocacy are notably high on the Gen Z agenda, even compared to those a few years older

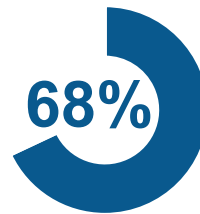
Amongst 16-24 year olds...



Agree that the **BLM** movement will have a lasting positive impact on UK society
(37% of 25+ agree)



Agree that they **feel** proud when the England football team 'take the knee' before matches
(33% of 25+ agree)



Agree they **would be** supportive if a family member wanted to undergo gender reassignment (have a sex change) (51% of 25+ agree)

Lived experience plays a big role in Gen Z's views

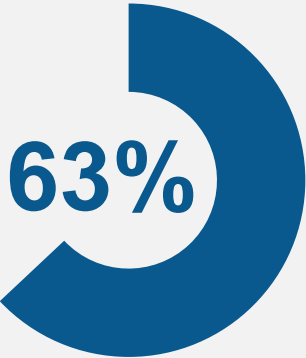
38% of 16-24 year olds know someone personally who describes themselves as **transsexual or non-binary**, (compared to 14% of adults aged 25+)

"People being transgender isn't harming anyone so why do people get so het up about someone wanting to transition? They're just doing what they need to do to feel happy in this society."
(18-24 yrs old, female, NEET)

Q4. Thinking about the United Kingdom as a whole, to what extent do you agree or disagree with each of the following statements? Base: All respondents (n=1026) ; Q6. Thinking about the United Kingdom as a whole, to what extent do you agree or disagree with each of the following statements? Base: All respondents aged 25+(n=1852); Q5. Thinking about your personal life, to what extent do you agree or disagree with each of the following statements? Base: All respondents (n=1026) ; Q7. Thinking about your personal life, to what extent do you agree or disagree with each of the following statements? Base: All respondents aged 25+(n=1852) ; Q3: Which of these statements are true for you? Base: All respondents (n=1026)

People of all ages feel their values differ from the generations either side of their own. Gen Z are no exception

Aged
16-24



Agree that their values are very different from the values of their parents' generation (13% disagree)

Aged
25+

My values are very different from the values of my parents' generation

NET: Agree 46%

NET: Disagree 21%



My values are very different from the values of younger generations

NET: Agree 57%

NET: Disagree 11%



*“The generation we live in today are very conscious... **the generation before us... expressed themselves in a different way.** We’ve become more conscious and social.”*

(18-24 yrs old, male, NEET)

Q5. Thinking about your personal life, to what extent do you agree or disagree with each of the following statements? Base: All respondents (n=1026) ; Q7. Thinking about your personal life, to what extent do you agree or disagree with each of the following statements? Base: All respondents aged 25+ (n=1852)

Gen Z barely recognise the 'culture wars' (as a term or concept)



"I've never heard this before but I assume it's about how different people live and what their beliefs are and the war aspect relates to the arguments that comes with those."

16-18 yrs old, male, in education

"I have never heard of it before but I'm assuming it means a disagreement or like a war against different cultures or different people with different backgrounds."

18-24 yrs old, female, university student

"I've heard of it but I don't know too much about it. I'd say it's clashes between cultures and ways of life and beliefs."

16-18 yrs old, male, in work

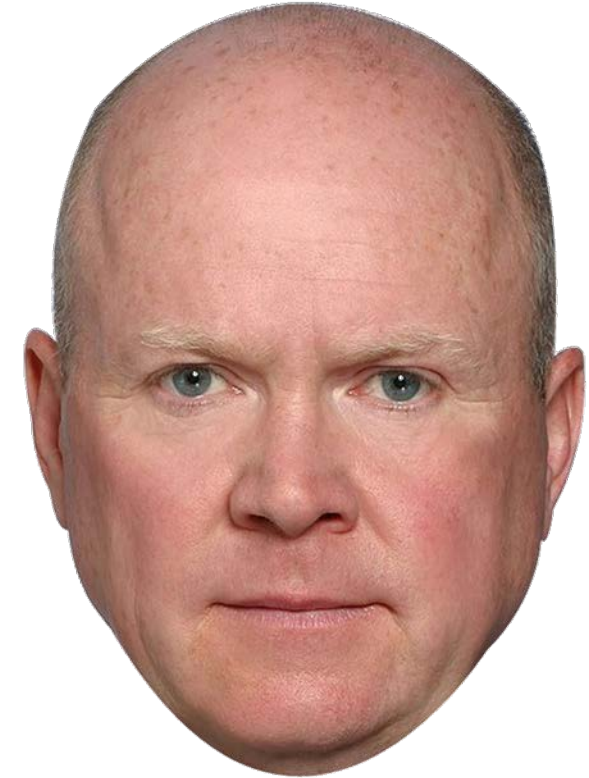
Despite rejecting the idea of a culture war, Gen Z see the 'old white man' as the typical opponent of their passions

“Older white males. They’re the people I tend to hear things like ‘oh political correctness’ or ‘you can’t say things that you could say in the past.’”

18-24 yrs old, female, university student

“I think it stems from your household. You can’t be born a racist or someone who hates gay people ... You’re small minded because you’re a product of your environment.”

18-24 yrs old, male, NEET

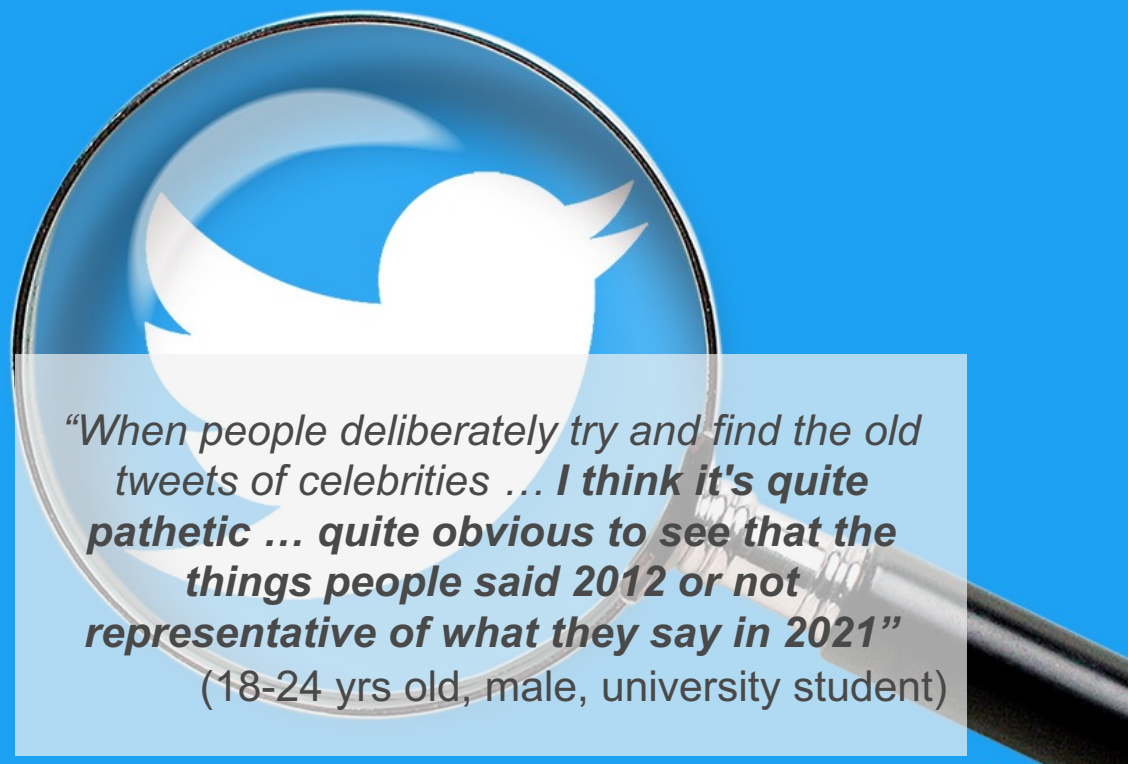


...but he's not a bogeyman, he's a product of his time & place (the past).

Young people tend to oppose cancel culture...

*"If someone makes a comment they could've just been immature. **We need to give people space to grow.** There are certain circumstances where people deserve a second chance."*
(18-24 yrs old, male, in work)

*"Everyone makes mistakes and to cancel someone as soon as they say something a little bit wrong. I understand if someone's been outright racist or homophobic. **That person should have the right to be educated and if they still don't change then maybe.**"*
(18-24 yrs old, female, NEETs)



*"When people deliberately try and find the old tweets of celebrities ... **I think it's quite pathetic ... quite obvious to see that the things people said 2012 or not representative of what they say in 2021**"*
(18-24 yrs old, male, university student)

... but Gen Z are confident in their values, and stand ready to call out offensive words or actions (publicly if needs be)

“I think sometimes a little bit of backlash is a good thing - people standing up and saying ‘I think what you said, or I think what you believe is wrong’. It can be used as sort of a educational event to sort of let people be a bit more aware of other people's views... but just shutting people out of conversation, **that's not really helping.**”
(18-24 yrs old, female, university student)



Over half of 16-24 year olds support removing statues to individuals associated with slavery (no matter what good they did in their lives)

But in the focus groups, there was a desire to place those statues in an educational context and promote deeper understanding

“Take the statue...and learn from the mistakes that that person made ... don’t erase it ...people just need to face what bad did happen”
(22-24 yrs old, female, graduate)

Q4. Thinking about the United Kingdom as a whole, to what extent do you agree or disagree with each of the following statements? No matter what good they did in their lives, statues to historical figures who were involved in the slave trade should be removed from public places Base: All respondents 16-24 (n=1026)

7. Conclusions and implications

Looking forward, there are 3 key characteristics to bear in mind when engaging with Generation Z

1

Gen Z look inward for their optimism.

They feel negative about the trajectory of their country, and dismayed by both Brexit and Covid. Nonetheless, they feel optimistic about their own lives and prospects.

2

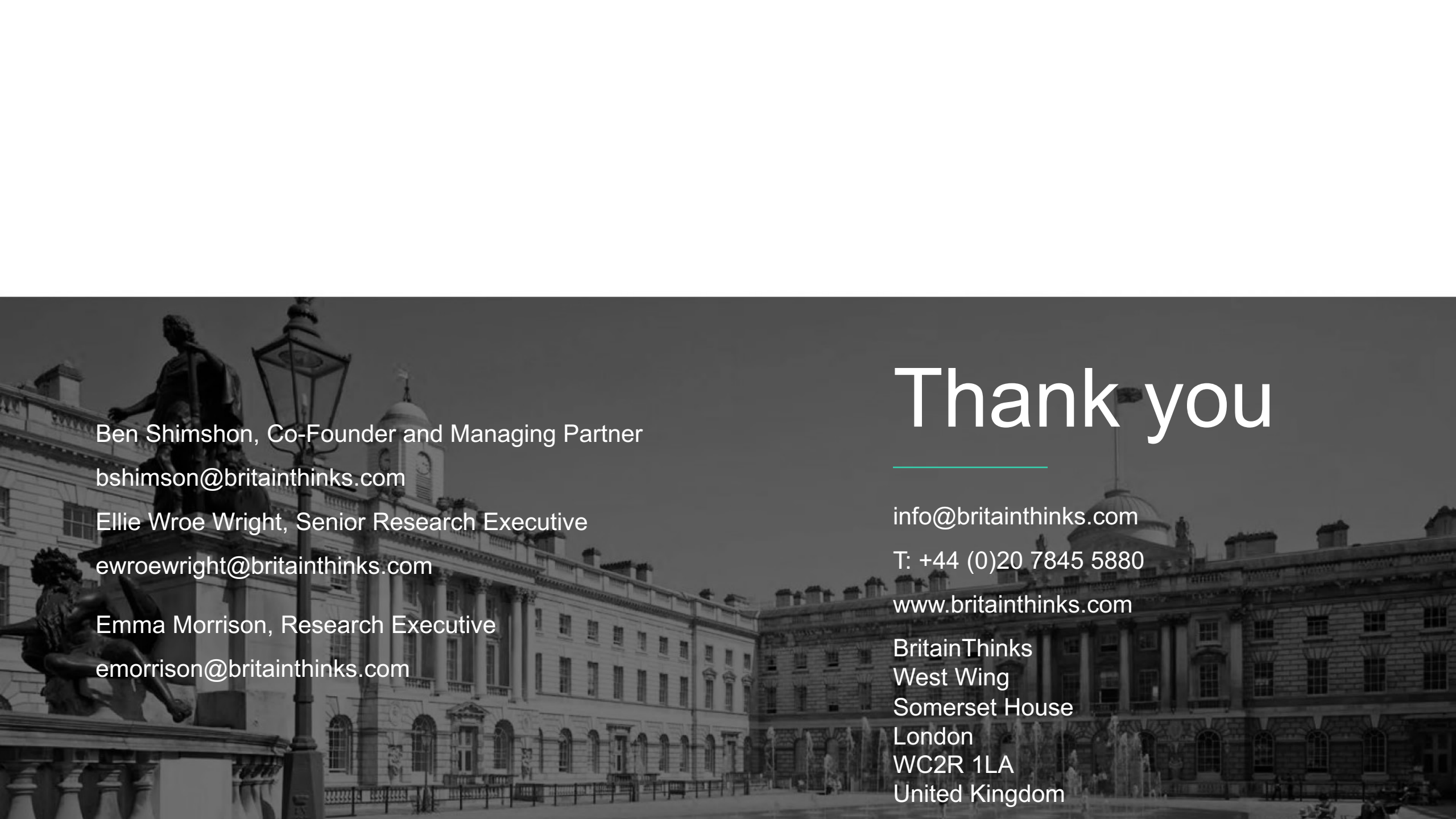
Gen Z are emotionally aware.

They are acutely conscious of mental wellbeing. They see positive attitude as the cornerstone of success, and mental ill health as their biggest challenge.

3

Gen Z are confident in their values.

They are champions of diversity and inclusion. Whilst they rarely want to cancel them, they aren't afraid to challenge views they see as offensive or insensitive.



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