Young in Britain.

THE SONDA REPORT ON BEING SIXTEEN TO TWENTY-NINE IN BRITAIN RIGHT NOW

A RESEARCH PUBLICATION



Sixteen to twenty-nine, in Britain, right now.

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INTRODUCTION

Read it in order or read it in pieces. Every chapter ends where the next one begins.

UK EVIDENCE UNLESS LABELLED OTHERWISE

They kept their end of it

This is a research report about being young in Britain right now, sixteen to twenty-nine, written for the people who make decisions about this generation, brands most of all. It does not try to sum a generation up in one line, because no generation holds still long enough for that, and anyone who tells you otherwise is selling something. What it tries to do instead is simpler and harder: look closely, check what can be checked, say plainly where it cannot, and hand over what it actually found. Read it in order or read it in pieces. Either way, it starts where the whole argument starts: with the promise this generation was made, and the promise it has watched come apart. The argument, stated once, is this. They kept their end of it. They worked, they studied, they took the jobs, they did what they were told the arrangement required. What has failed is the other side. The labour market, the housing ladder, politics, the platforms and the brands were all supposed to hold up their half of it, and have not. That is the distinction the rest of this report depends on. This is not a generation that has given up on effort. It is a generation that has given up on the institutions that were meant to reward it.

THE BELIEF COLLAPSE

63%

2025

36%

2026

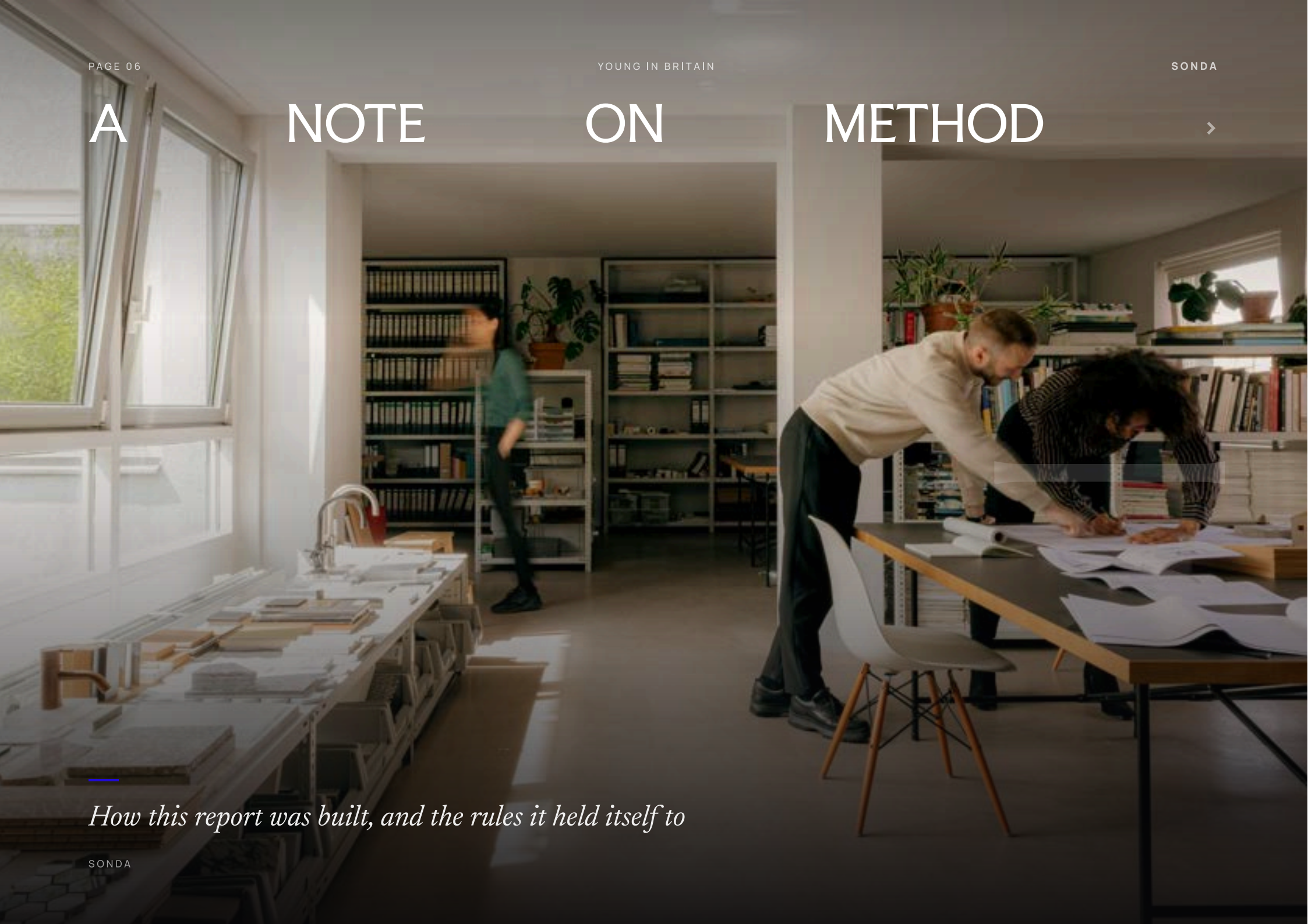
63%

Personal optimism about their own lives, holding steady across the same period.

The share of UK 16 to 29s who believed they would end up better off than their parents, in two consecutive years. Belief in the country fell by nearly half. Belief in themselves did not move.

JOHN SMITH CENTRE UK YOUTH POLL · 2,307 RESPONDENTS AGED 16 TO 29

A NOTE ON METHOD



How this report was built, and the rules it held itself to

This report was built the way a sceptical reader would want it built, one chapter at a time, each one researched fresh against the most current UK data available rather than assembled from memory or last year's deck. Where a figure could be verified against a primary or official source, that is what carries it: the Office for National Statistics, Ofcom, the NHS and the Adult Psychiatric Morbidity Survey, the FCA and the CMA, the BPI, the British Election Study, Music Venue Trust, the Gambling Commission, peer-reviewed academic work. Around that backbone sit disclosed-methodology trackers, YouGov, Ipsos, Savanta, Opinium, Focaldata for the John Smith Centre, whose samples and fieldwork dates are stated rather than hidden. And around that sit company, platform and lobby figures, Vinted, Monzo, Diageo, TikTok, the trade bodies for beer and hospitality and gambling, used for scale and always named as what they are: interested parties reporting on themselves.

That naming is not a formality. A figure from a platform that benefits from the story it tells is still useful, often the only number that exists, but it is reported here as a platform's own claim, not smuggled in as independent fact. The same discipline applies to age. A statistic measured at 16 to 24 is never silently stretched to cover 16 to 29, and a number from 18 to 34 is not quietly presented as if it means the same thing. Every figure in this report carries the bracket it was actually measured at, because a generation described one age bracket too wide is a generation slightly misdescribed, and brands act on these numbers as if they were precise. Where the only available data is American or European and fills a genuine gap in the UK picture, it is used, but it is labelled, never dressed up as a British finding it is not.

Retracted findings stay retracted. The clearest example in this report is the so-called Quiet Revival of young churchgoing, a story that ran for the best part of two years before the data behind it was found to be compromised and formally withdrawn. It appears here once, as a retraction, not as a live statistic, and its inclusion is itself a small warning about how eagerly the market accepts a tidy story about the young before anyone has checked it.



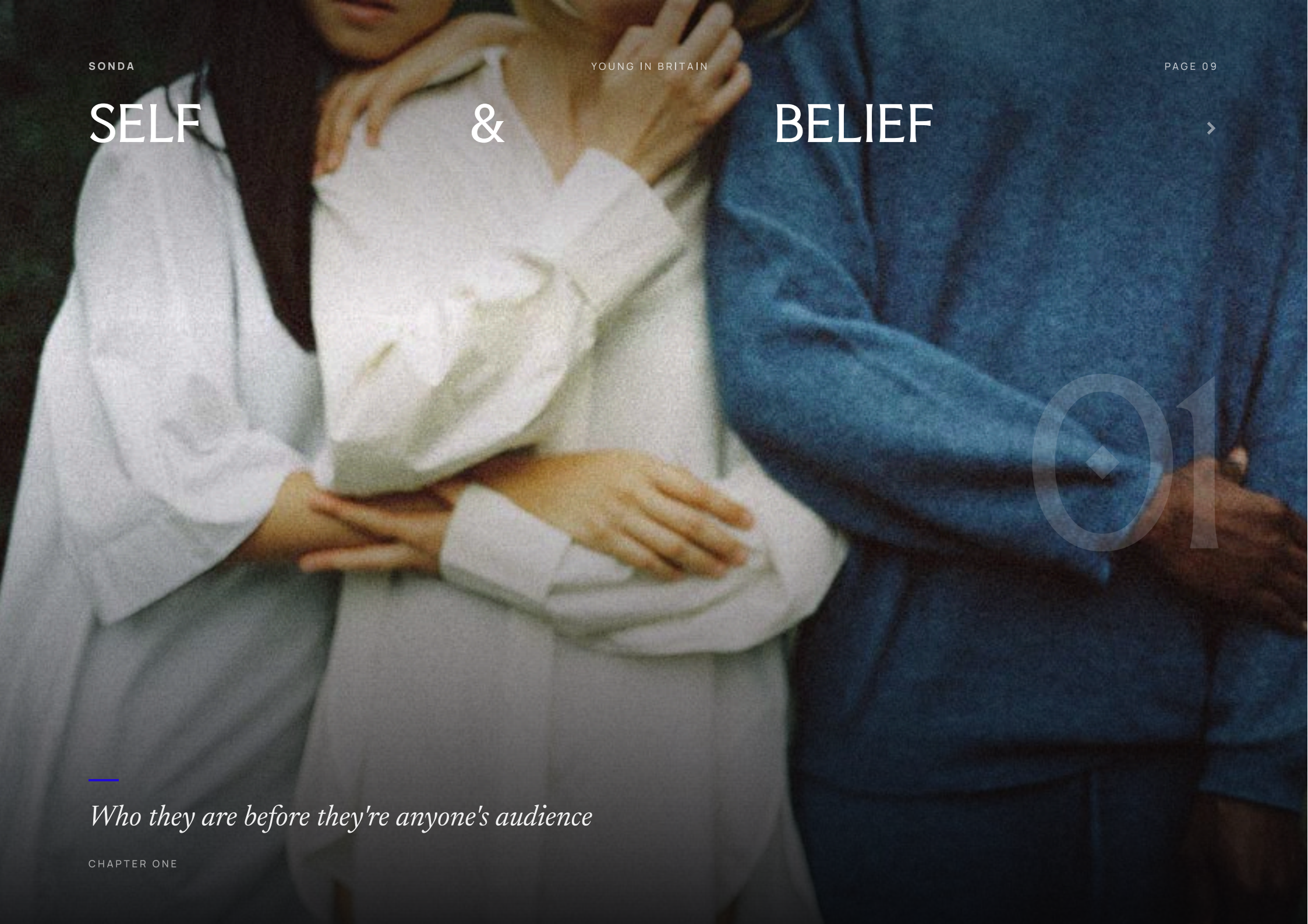


The same applies to figures that move quarter by quarter, waiting lists, NEET counts, inflation-sensitive spending data, which carry their as-at date rather than being presented as settled for all time. A number that was true in the spring is not automatically true by publication, and the honest move is to say so rather than let a stale figure pass as current.

One rule governs tone rather than fact, and it is worth stating plainly because it shapes every chapter that follows. The temptation in research like this is to read every playlist as a coping mechanism and every gym session as a symptom of something deeper. This report resists that temptation deliberately. A great deal of what young Britain does is simply people living their lives, having fun, building things, enjoying a night out, and the analysis says so wherever that is what the evidence actually shows. Constraint explains a great deal in the chapters that follow. It does not explain everything, and treating it as if it did would be its own kind of distortion, flattering to the researcher and false to the people being described.

Nothing here claims to be the final word on a generation that, by its own nature, will not hold still long enough to be captured once and filed away. What this report claims is narrower and more useful: that every figure in it can be traced to where it came from, that no bracket has been stretched to make a point look bigger than it is, that vendor and lobby interest is named rather than hidden, and that where the evidence was genuinely unresolved, this report says so rather than choosing the tidier story. The mistakes that remain, and there will be some, are the authors' own. We would rather they were found than never checked.

SELF & BELIEF



01

Who they are before they're anyone's audience

CHAPTER ONE



Ask UK 16 to 29s what they value most in life and the answer, in a word, is relationships. Not money, not causes, not careers: family, friends, partners. That finding comes from one of the largest dedicated studies of this generation, the John Smith Centre's UK Youth Poll (2,307 young people aged 16 to 29, with 260 depth interviews), and it is worth sitting with before anything else, because it cuts against almost every portrait sold about them. The most photographed, most analysed, most marketed-to generation in British history, asked what actually matters, gave the oldest answer there is.

Start with composition, because it changes everything downstream. This is the most diverse cohort in British history: mixed identities are the fastest-growing ethnic category, nearly one in five people in England and Wales was born abroad, and in the biggest cities the "minority" young person is the majority. Sexuality has shifted a generation in a decade: 8% of 16 to 24s identified as lesbian, gay or bisexual in 2024, against roughly 1% of over-65s, a change led by bisexual identification and by young women (ONS). Faith, which this chapter comes back to properly near the end, is diversifying rather than simply disappearing. Two quieter facts matter just as much. Place: 62% report pride in their hometown, and most young Britons build their identity from local loyalties, the club, the postcode, the accent, far more than the rootless-digital-native cliché allows. And class: the deepest divide in this generation is not taste or politics but economic route, and it will surface in every chapter that follows. What a young person can afford predicts more about them than the year they were born.

What runs underneath that composition is a moral temperament, not a manifesto. On their own self-description, this is not an activist generation. Nearly half place themselves dead centre of the political scale, 47% between four and seven out of ten, with 17% leaning left and 20% right. The loud youth politics that dominates coverage is a minority amplified by engagement: the passionate ends post, the quiet centre scrolls. What they do hold, almost universally, is a set of character values with commercial consequences.



Asked which traits matter in the people and organisations around them, the answers cluster on honesty (62%), trustworthiness (61%) and consistency (56%, YouGov Profiles). Authenticity is the master value, and they hold it inside a paradox they understand perfectly well: they demand realness while knowing everything, including themselves, is performed. Irony is armour; underneath it sits a genuine turn toward sincerity, and a hardening resistance to the synthetic. Gen Z excitement about AI fell fourteen points in a year while anger rose to 31% (Gallup, 1,572 14 to 29s, early 2026), and 57% of Gen Z non-users say they are not open to adopting it at all, nearly double the resistance of boomers (Numerator, 2026). When 82.7% of young music fans say human creativity is essential while 97% cannot tell AI music from human blind (BPI; Deezer/Ipsos), authenticity has stopped being a detectable property and become a claim about intent. Who made this, and why, now matters as much as what it is.

Their moral frame is protective rather than absolutist, and it is consistent across every domain it touches. On free speech, young Britons run the exact opposite of their elders: 61% of 16 to 24s would support dismissal over sexist jokes at work, against 35% of over-55s (King's College London). Read it as a harm-protection ethic, not fragility, the same instinct that drives their scepticism of AI, their demand for honesty, and their punishment of brands that get the two confused.

They audit every brand against three traits: honesty, trustworthiness, consistency. Not one of them is about the product.

SELF & BELIEF · 62 / 61 / 56

And they carry a contradiction that explains half their behaviour: the rigged-system mindset is now dominant, most believe the economy is stacked against people like them, yet belief in merit persists, and concern about inequality far outstrips appetite for redistribution (JRF; More in Common). They think the game is fixed and still intend to win it. Hold that double belief; it is the psychological engine of everything from the side hustle to the savings app.

There is a leading edge to this, and it is worth watching even though it is not yet the norm. Highsnobiety surveyed 730 people from its own global audience of early adopters in 2026, alongside a comparison group of around a thousand general Gen Z and Gen Y consumers. Among that leading-edge group, 73% agreed that what sits in their bathroom cabinet tells a story about who they are, and 71% said groceries have become a form of lifestyle expression. This is a self-selected taste-making minority, not a picture of young Britain, and it should be read as an early signal rather than a measurement. But the direction it points is consistent with everything else in this chapter. Identity is no longer concentrated in one category. It has spread across every surface a person owns, and the ordinary ones now carry as much signal as the expensive ones.

One value has quietly moved down the list, and it deserves honest reporting: climate. Held as a value, yes, but in the ranking of what actually keeps them up at night, climate came last of thirteen anxieties at 10%, far behind money at 37%, work pressure at 23% and job insecurity at 20% (John Smith Centre). This is not denial; it is triage. A generation that cannot cover a rent deposit has subordinated the planetary to the material, and any brand still leading its youth strategy with sustainability messaging is speaking to the anxiety ranking of 2019.

Money is what they fear first and always. The King's Trust Youth Index, the longest-running measure of youth wellbeing in the UK, sixteen years of data from thousands of 16 to 25s, finds money the area of life young people are least happy and confident about, with the confidence score sitting exactly where it sat in 2009, in the teeth of the global financial crisis. Except there is no crisis to blame now; this is just the weather.

62 / 61 / 56

Honesty, trustworthiness, consistency. The traits they audit every brand against.

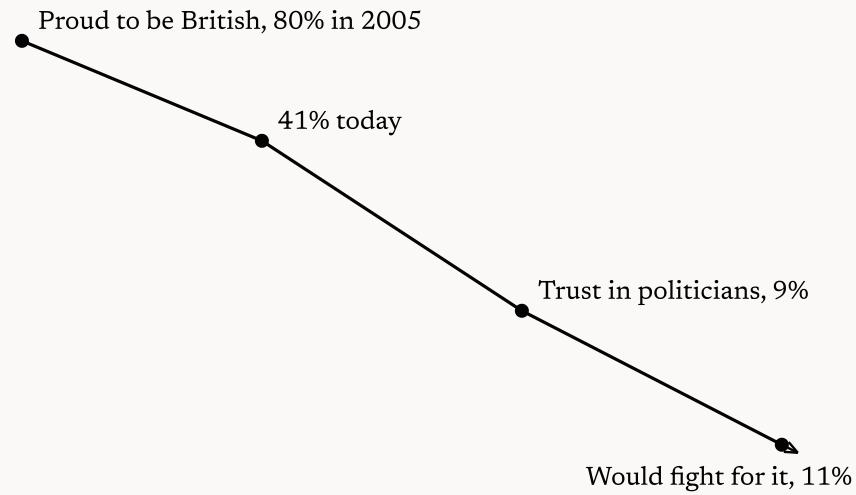
YOUGOV PROFILES

More than seven in ten say they wish they were not starting their careers in the current economic climate (The King's Trust, 2026).

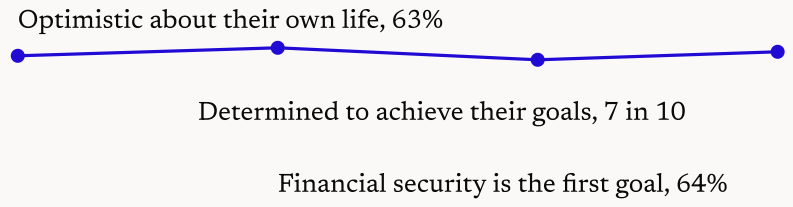
Then the mind, and here the fear is less a spike than a permanent climate. Common mental health conditions among 16 to 24s rose from 17.5% in 2007 to 25.8% in 2023/4, the steepest climb of any age group in the national psychiatric survey, and the burden is wildly uneven: young women carry nearly three times the rate of young men (36% against 13.5%), while young men account for around three quarters of young suicide deaths, they present less and die more. Underneath the diagnosed rate sits something broader and harder to put a clean number on: 16 to 29s post the highest anxiety score of any age group in the country, and close to nine in ten say they feel anxious at least sometimes, a third of them on most days (ONS; Mental Health Foundation). Loneliness runs alongside it at 31%, the same finding this report keeps returning to. And underneath the fluency sits a genuine paradox: this is the generation that talks most openly about mental health, "boundaries", "burnout" and "triggered" now everyday words, self-diagnosis and neurodivergent identity increasingly load-bearing parts of who someone says they are, and yet nearly half still say they feel ashamed to admit how anxious they actually are. Openness in public, shame in private, is the honest shape of it. Serious UK researchers debate how much of the measured rise is worsening health versus better recognition and broadened definitions, a debate that stays open here. But two things are not in dispute. The distress is real enough that a quarter of young people who want to work say mental health stops them. And the same generation is objectively the least reckless on record: teen pregnancy down two thirds, hazardous drinking halved since 2000, youth offending at record lows. Strained but adapting is the honest verdict, anxious, yes; broken, no. What they have built instead of a cure is a coping kit: dry, self-aware humour that makes the unsayable sayable, a wellness economy of run clubs, journaling and £10-a-month calm apps, and a hardening instinct toward rest as a right rather than a luxury, the "bare minimum" day worn without embarrassment. None of it fixes the weather. It is how they have learned to dress for it.

THE DOUBLE BELIEF

BELIEF IN THE SYSTEM



BELIEF IN THEMSELVES



Belief in the system falls away while belief in the self holds steady. The two lines do not resolve into one another. They run in parallel, and that parallel is the psychological engine behind everything from the side hustle to the savings app.

FIG. 01



What they fear beneath both, the interviews keep finding, is a life that doesn't add up: effort that converts to nothing, milestones that recede as fast as they're approached, a future that costs more than it pays. Which makes their hopes all the more striking, because the aspirations survived. Asked their biggest goals in life, young people rank financial security first (64%), good mental health second, and having a family third (The King's Trust), security, sanity and love, in that order. Seven in ten describe themselves as determined to achieve their goals. Nine in ten young women still hope to become mothers, and the two-child family remains the modal dream (Centre for Social Justice). The milestones are deferred, not rejected, postponed by rent and insecurity, not by a change of heart, and "rich", when they define it, means security and freedom from anxiety, not display.

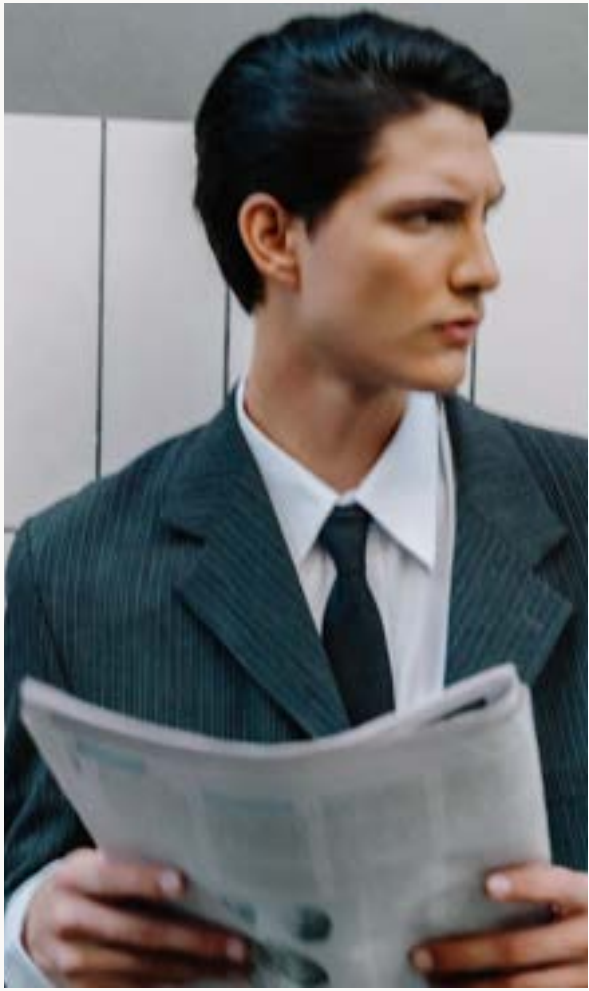
What has changed is the shape of success itself. The global evidence (EY's 10,000-person study of Gen Z across ten countries, international, so labelled as such) finds success redefined from the outside in: emotional wellbeing, strong relationships and impact now outrank titles and salaries, and barely half still see a single lifelong employer as a viable path. The British data agrees in its own accent: the personal optimism that survives everything. Around 63% remain optimistic about their own lives even as belief in the system collapses around them. They back themselves and not the machine, hopeful for themselves, hostile to the system, hedging their bets. That split is not a contradiction to be resolved. It is the defining structure of this generation's inner life, and the single most important thing to understand about them.

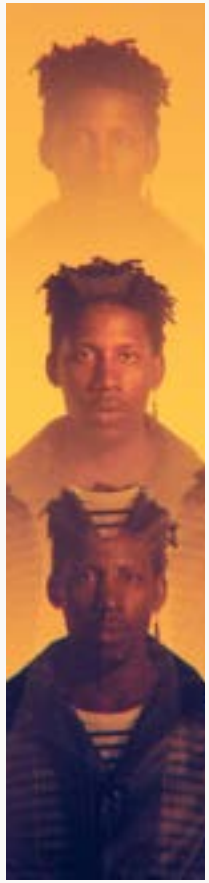
That personal hope curdles fast the moment the frame widens from themselves to the country. Here is the newest and perhaps most consequential dataset in this chapter. Twenty years ago, 80% of young Britons said they were proud to be British. Today it is 41% (YouGov for The Times, 18 to 27s, 2025). Half think Britain is a racist country; nearly half think it is stuck in the past; only 11% say they would fight for it. Yet the same survey finds 47% calling Britain tolerant, and when Britons of all ages are asked what would make them proud of the country in ten years, the answers are strikingly civic: a functioning NHS (69%), affordable daily life (53%), affordable housing (36%), far ahead of any exclusionary measure (IPPR/YouGov, December 2025). The pride that collapsed is pride in the state's performance and the national story; pride in culture, sport, music, the local, survives largely intact. They are not anti-British. They are unconvinced Britain is holding up its end.

The same pattern runs through every institution. Trust in nurses: 92%. Engineers: 90. Doctors: 85. Then the cliff: journalists 27, government ministers 14, politicians 9, and at the very bottom, the first time the profession was ever measured, social media influencers at 6%, the lowest score recorded for anyone since the index began in 1983 (Ipsos Veracity Index,

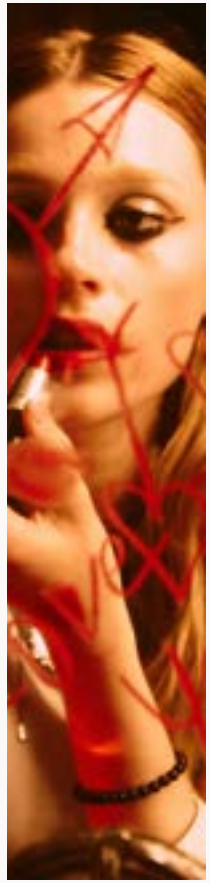
Watch where they go when the institution does not have an answer. Reddit has now overtaken TikTok to become Britain's fourth most visited social media platform, according to Ofcom, and Gen Z women account for a third of all UK users. The pull is not entertainment. It is the search for people with the same problem. One 24-year-old described looking for information on endometriosis and finding, for the first time, women whose experience with doctors matched her own. The platform gives her something the surgery could not, which is the confirmation that she was not imagining it. This is the belief pattern of the whole chapter in miniature. The institution did not come through, so the answer gets crowdsourced from strangers.

November 2025). And still a quarter of 16 to 34s consume influencer news daily. Trust and attention have come apart, which later chapters will show is the key that unlocks how this generation is actually influenced.














Democracy they keep, pointedly. Preferred to dictatorship 57 to 27, even while 63% say it is in trouble. The viral claim that half of them want a strongman collapsed under proper testing, a careful re-run found 6% wanting a genuine dictator. What they want is a state that works: roughly half would prefer expert government, 41% believe economic growth will make no difference to their own lives, and their politics is scattering accordingly, fewer than half of under-30s voted for the two main parties in 2024, turnout among 18 to 24s fell to around 37%, and non-voting concentrated hard among the poorest. Gaza became a genuinely formative political event, cited by two thirds of young Labour switchers. And the sexes are diverging: Reform leads among men aged 16 to 25 while the Greens lead among women the same age, though the movement is asymmetric and female-led, young women swinging left far faster than young men swing right. The manosphere completes the picture with its essential correction: around 80% of teenage boys have seen Andrew Tate content, and just 13% of young men view him positively.

Near-universal exposure, minority belief. What the research behind that gap keeps finding young men actually asking for is not grievance. It is role models.

Faith completes the picture of what they still believe in when the state and the feed both let them down.

Irony is armour. Underneath it sits a genuine turn toward sincerity.

Britain is secularising fastest at the young end, 61% of 16 to 34s have no religion, weekly Christian attendance among under-35s sits around 4%, and the decade's loudest counter-claim, the "Quiet Revival" of young churchgoing, was formally retracted in March 2026 after the data behind it was found to be compromised. It appears here only as a caution about how badly the market wants a youth-faith story.

Because the real story is better, and almost nobody is telling it. Faith among the young is not dying; it is changing hands. Non-Christian religions doubled their share of the population in twenty years and are now youngest where Christianity is oldest: non-Christian identification is highest among the under-35s, inverting every historic pattern. At the centre of it are young British Muslims, 46% of UK Muslims are under 25, the median age is 27, half are now UK-born (MCB, 2025), markedly more devout than their peers, with 89% praying at home and around two thirds attending mosque, and describing themselves in the academic research as "surveilled but not seen". Commercially they are among the most underserved audiences in the country: young, digital, brand-aware, with faith-inflected demand running through modest fashion, halal food and the sober economy. The brands that have moved early show what taking this audience seriously looks like, Nike's Pro Hijab did more for its standing with young Muslim women than a decade of diversity advertising, precisely because it was a product, not a statement.

Around the institutional edges, something softer persists. The spirituality numbers deserve a correction that most trend decks refuse to make: the best British data finds gender, not age, is the real predictor, around a third of women describe themselves as spiritual against a fifth of men, and young Britons are no more spiritual than their grandparents (YouGov). What is genuinely new is the form: astrology, tarot and manifestation practised as tools for self-reflection rather than belief systems, traded through TikTok and apps, taken seriously enough that the UK's Astrological Association now publishes a magazine aimed squarely at the young.





And beneath all of it, ritual, the human need for repeated, shared practice, has simply migrated: the Sunday long run, the gym schedule, parkrun, Wrapped in December, the group chat that never sleeps. A generation without churches has not stopped congregating. It congregates elsewhere, and mostly, it pays for the privilege.

Understand them before you sell to them: that is this chapter's whole argument, and what follows is what falls out of it directly. Their centre of gravity is relationships and security, not causes and display, which means marketing built on status and aspiration is aimed at a self-image they no longer hold, while marketing that helps them protect what they value, their people, their money, their peace of mind, lands where they actually live. If a brand speaks on issues, it should be as selective as they are: the British public's appetite for brand stances is real but specific, mental health tops the list of issues people accept brands engaging with (64% in the UK), ahead of climate, with geopolitics a red line (Statista Consumer Insights). Beneath that headline sits a clear hierarchy, not a blanket licence. Climate (63%), diversity and inclusion (58%) and free speech (56%) all sit close behind mental health, while international conflicts fall to 37% and political candidates and religion drop under 30%, and among young people specifically the appetite is if anything wider, poverty and inequality, racism, climate and women's rights are all live territory for a large share of 18 to 27s. The distinction they are drawing, once you look closely, is between a brand having values and a brand taking a side: fairness, honesty and treating people well are read as universal and welcomed, picking a party or a position in a geopolitical conflict is read as partisan and punished.

And the appetite for a boycott is much louder than the boycott itself. Nearly half say they would boycott a brand they disagree with; measured behaviour puts the real figure closer to one in eight, and most outrage decays within weeks unless it is sustained by an organised movement or backed by an easy substitute, which is exactly how Bud Light lost its crown in America and how UK imports of Israeli goods actually fell during the Gaza boycotts. Silence is not the safe option it looks like, though: over half of people, and an even larger share of the young, read a brand's silence on an issue it has already claimed as evidence it is hiding something. The safe posture is not loud and not silent. It is consistent, on the few issues a brand has genuinely earned the right to hold. The models that work earned the right through action sustained for years, Dove's two decades of self-esteem work, capped by its public pledge never to use AI-generated imagery; CALM turning suicide prevention into some of the most affecting advertising this country has produced. The reverse holds just as hard: McDonald's found this out when it removed the smile from the Happy Meal box for a single Mental Health Awareness Week, a gesture read by the audience as trivialising rather than caring. A stand is a product decision and a budget line, sustained past the awareness week, or it is a liability. The authenticity economy, meanwhile, is now literal: "made by humans" is becoming a claim with measurable value to an audience that penalises the synthetic on principle, and honesty, trustworthiness and consistency, their stated top traits, are exactly what they audit for. And the gaps are the opportunity: young Muslims, under-served and growing; young men, over-targeted by grievance media and under-served by role models, so that a brand offering genuine mentorship, skills or belonging walks into open space; and the happiness deficit itself, a generation whose confidence about money sits at financial-crisis levels does not need another aspirational campaign, it needs brands that make one corner of life demonstrably easier, and it repays them with the scarcest asset it has, trust.



They back themselves and not the machine: hopeful for themselves, hostile to the system.

That is who they are before anyone tries to sell them anything: relationship-first, quietly anxious, personally hopeful, institutionally sceptical, and building belief in whatever still delivers. The next chapter follows them onto the ground where all of it gets tested first, the money in their account and the work that is supposed to be paying for the life they actually want.

6%

Trust in social media influencers, the lowest score for any profession since 1983.

IPSOS VERACITY INDEX, NOV 2025

MONEY & WORK



02

The floor everything else stands on

CHAPTER TWO

Everything in this report stands on a material floor, so the floor comes early. And the first thing to understand about young money in Britain is that there is a whole financial life happening on the phone that most of the industry writing about "Gen Z" has never opened.

Start where they actually keep their money. The current account is no longer inherited furniture. Nearly half of 18 to 24s, 45%, switched banks in the past year, against 4% of over-65s, and among the under-35s the top reason for moving was not a cash bribe but better customer service (KPMG, January 2026). The winner of that churn is well known by now: Monzo reached 15.2 million customers in the year to March 2026, adding a record three million in twelve months, 79% of them arriving through word of mouth rather than advertising, and "I'll Monzo you" has settled into the language the way "hoover" once did. The detail that should stop a marketer mid-scroll is the youngest edge: one million of those customers are under sixteen, roughly one in eight British children aged six to fifteen, onboarded less than a year after Monzo opened to them. The bank of first resort is being decided in Year 8. Legacy banks still hold millions of young customers through the account a parent opened, and the switching service has had to build entire campaigns just to overcome that inertia, but inertia is a wasting asset: only 13% of 25 to 34s say they will never switch, the lowest of any age group.

What do they do inside those apps? They build control systems. The behaviours read like superstition until you see them together, and then they read like engineering: 69% of Gen Z set budgets; nearly a fifth of 18 to 24s run no-spend months; social-feed savings challenges, sinking funds and "loud budgeting" cycle through FinTok; three in ten still withdraw cash to make their own spending harder, a revival strong enough that the ATM network itself has noted young people talking up notes and coins. The round-up, the pot, the instant notification: these are not features, they are the product. A generation that cannot control the rent controls the £4.50, and any brand touching young money should understand that friction, when it is chosen, is the point. The spending that survives the control system tells its own story.



140

Applications now chasing every graduate vacancy.

Subscriptions have quietly become the fixed cost nobody budgets honestly for: UK Gen Z carry an average of £305 a month in subscriptions, triple Gen X, across streaming, meal kits, wellbeing apps and the rest (Visa, March 2025, and yes, a payments company has an interest in the story, but the direction is corroborated everywhere). Three quarters of them have had a bad direct-debit experience, the surprise charge, the cancellation maze, which is why frictionless cancellation is becoming a trust signal rather than a legal chore. Fitness has overtaken streaming and dining as a stated spending priority for 16 to 28s, and the treat economy documented across this report, the £5 coffee, the one protected splurge, runs on the same psychology as the budgeting: small, controllable, identity-bearing. The barbell, the cheap floor defended by one meaningful peak, starts here and shows up in every consumption chapter that follows.

Then there is the part of young money the industry keeps getting wrong in both directions: investing. The caricature says day-trading crypto bros; the counter-caricature says a generation too broke to invest at all. The data says something more interesting. More of Gen Z have tried investing than any other generation, around two thirds have put money into something at some point, and the platforms that made that possible are named and specific: Trading 212 with 4.5 million funded UK accounts and no platform fee, Freetrade with 1.6 million, Moneybox at 1.9 million customers marketing ISAs on TikTok, Monzo bolting ETFs into the current account and signing up half a million investors almost as an afterthought. But the depth is shallow: just 9% of 18 to 24s hold a stocks and shares ISA, and the average young ISA sits under £8,000. Crypto is retreating from its youth peak rather than defining it, 15% of 18 to 34s hold some, down as overall UK ownership fell from 12% to 8% (FCA, December 2025), which leaves it a minority hedge, not a generational religion. And buried in the official numbers is the finding a smart financial brand would build a decade of strategy on: young men are markedly more likely than young women to hold investments, a 22% against 13% split on stocks and shares ISAs, a gender gap in wealth-building opening at exactly the age when compounding matters most.

Renting does not feel like a stage on the way to somewhere. It feels like the destination.



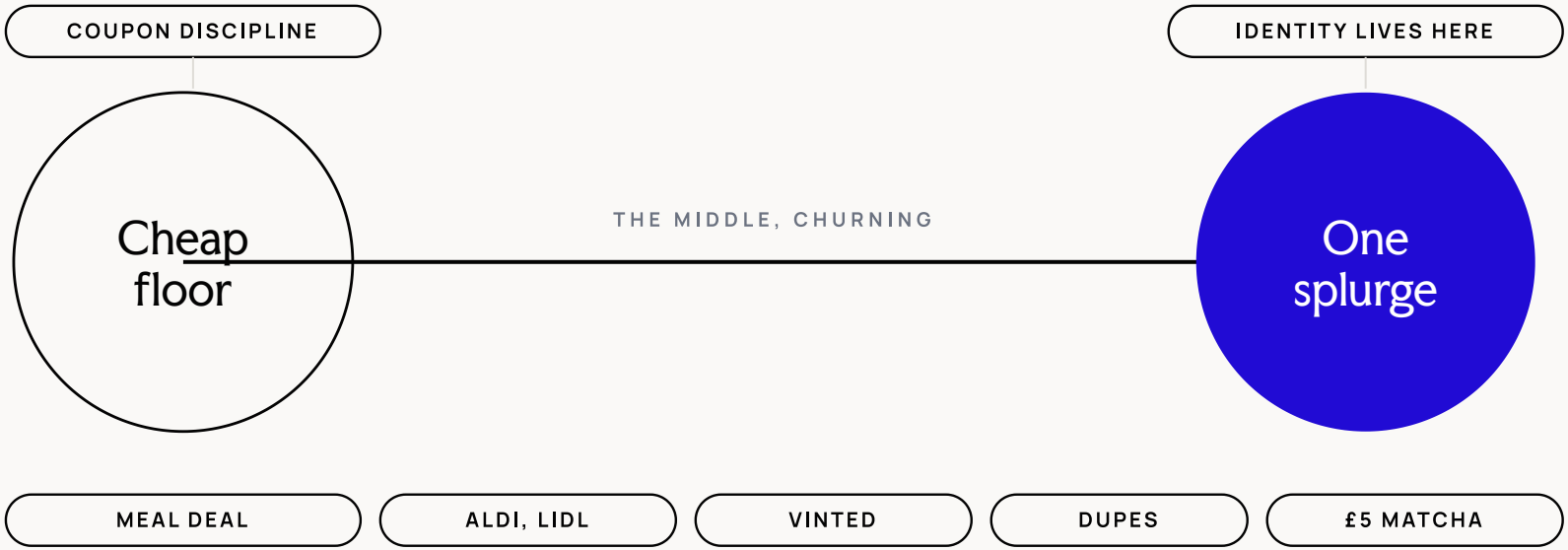
The first brand to make investing feel as designed-for-her as the banking apps already do is walking into open space, and the Treasury has just tilted the table toward equities anyway, cutting the cash ISA allowance for under-65s to nudge savers into the market.

Where do they learn any of this? Not from banks, mostly, and not from parents who never had to navigate this landscape. They learn from the feed, and the feed is a genuinely mixed teacher. The FCA finds 62% of 18 to 29s follow financial influencers and that most of those who do trust them; the same regulator ran 74 enforcement actions against finfluencers in 2025, nearly triple the year before, and took a guilty plea from a reality-TV name for promoting unauthorised schemes. Martin Lewis remains the exception that proves the rule, earned authority in a landscape of performed expertise. In the vacuum where a mentor should be, a 24-year-old with a ring light is teaching Britain's young how compound interest works, sometimes well, sometimes ruinously, and the regulator has decided the difference is now a criminal matter. Two more pieces complete the money picture, and they sit at opposite ends of the same generation. At one end, the safety net that is really a class divider: the Bank of Mum and Dad moves roughly £17bn a year in informal gifts and loans, mostly parents helping adult children with deposits, and the children of university-educated homeowners receive around six times more than the children of renters (IFS). Nearly two thirds of buyers aged 20 to 24 had family help; the Bank of England calculates parental help buys a ten-year head start on homeownership.

The great wealth transfer everyone in wealth management is planning for has already started at the young end, and it is flowing along exactly the class lines this report keeps finding, which is why "Gen Z" as a money audience is really two audiences: those waiting for a transfer and those who know none is coming. At the other end sits the pension, the purest measure of whether they believe the future will honour its promises. Auto-enrolment quietly works, around nine in ten eligible employees participate and young opt-out never materialised at the feared scale, but ask them what they think and the faith evaporates: 46% of Gen Z believe the State Pension will not exist by the time they reach it, they expect to retire at 71 if at all, and only 13% call pensions a priority. They are saving for a future they do not quite believe in, on autopilot, which may be the most quietly poignant data point in this chapter. The BNPL era of young credit, meanwhile, just ended its lawless years: from 15 July 2026 buy-now-pay-later came under FCA regulation, affordability checks and all, closing a chapter in which one in five UK adults, skewing heavily young, used credit that no one was watching.

Underneath all of it sits the fact that actually decides how far any of this stretches: where they live, and what it costs. Living with parents has quietly become the modal experience of the late twenties rather than a footnote to it, 28.7% of 20 to 34s in England in 2025, and nearly 35% of young men specifically, a figure that has climbed steadily for a decade (ONS). Renting is what most of the rest do, and it does not feel like a stage on the way to somewhere; it feels like the destination. A 19 to 29-year-old renter now hands over around a third of their income in rent, rents having risen a quarter against wage growth of under a fifth since 2022, and the flat itself is frequently a single room in a shared house rather than a home, a landlord's living-room conversion doing double duty as someone's whole social life. Debt sits inside this picture unevenly, and the industry keeps misreading which part actually hurts. Student debt, now averaging around £46,000 at the point repayment starts, functions psychologically as a graduate tax rather than real debt, mentally written off by borrowers who know most of it will never be repaid.

THE BARBELL



Young spending is a cheap, disciplined floor defended by coupon logic, plus one protected splurge where identity actually lives. The middle, the merely adequate and the merely mid-priced, is where churn happens.

FIG. 02



What genuinely damages people is the other kind, rent arrears, council tax, credit cards, the debt with no thirty-year forgiveness clause, and 25 to 34s are almost twice as overrepresented among debt-charity clients as their share of the population would predict (StepChange). The net effect is a measurable mindset, not just a mood: over half of 16 to 25s say they worry the cost of living means they will never be financially secure (The Prince's Trust). Money is not just tight. It no longer reliably buys the two things it is supposed to, a home and a settled future, and every product built for this audience is competing against that fact whether it admits it or not.

Pion's 2025 study of 2,131 UK 16 to 24-year-olds arrives at the same conclusion from the commercial side, and offers a more useful way to cut the group than age does. It splits them by two questions: where the money comes from, and how freely it gets spent. Supported but cautious, at 37%, have their costs covered by family and still budget tightly. Independent and cautious, the largest group at 38%, fund themselves through work, loans and savings and count every pound. Work hard, play hard, at 14%, self-fund and spend freely. Parent-supported splurgers, the smallest at 12%, have costs covered and spend without much thought. Three quarters of the cohort sit in one of the two cautious groups. The finding that matters is not the split itself but what it does to targeting. Two 19-year-old students at the same university, in the same halls, can sit in different quadrants and behave like different consumers, and the quadrant predicts their behaviour better than their age does.



Work is where what this generation was promised meets what actually arrived, and the gap between the two is now the widest in modern memory. The context first, stated plainly: around 1.01 million 16 to 24s are not in education, employment or training, 13.5%, the worst since 2013, with the growth driven by economic inactivity and ill health rather than job-hunting; graduate recruitment at the leading employers has shrunk by a quarter since 2022 to its lowest level since 2012; and only 12% of 18 to 21s feel very confident about finding good work right now. Seven in ten young people say they wish they were not starting their careers in this economic climate, and 140 applications now chase each graduate vacancy. Whatever else this chapter says about attitudes, hold it against that wall. They are not workshy. The market is failing to hire them. So what do they actually want from work, when they can get it? Not the purpose-over-pay fantasy that a decade of employer branding was built on. Ask them to rank what matters and salary comes first, 82%, with career growth at 85% and flexible hours at 80% pressed right up against it: pay, progression and flexibility as a single package, not a trade. The flexibility is not posturing; one in twelve 18 to 24s left a job in the past year specifically over the lack of it, more than double the all-worker rate (CIPD). But the office is not the enemy either, and this is the nuance most coverage misses: the strongest case employers make for office days is onboarding, learning and connection, and young workers, the people with the most to learn and the fewest work relationships, are quietly the group with the most to gain from being in the room. What they resent is not the building. It is presence without purpose, the mandated commute to sit on the same video calls. Structured hybrid with real teaching in it is the offer that matches the evidence. And their expectations of employers hardened into law while nobody was watching: the Employment Rights Act cuts the unfair-dismissal qualifying period from two years to six months from 2027, which quietly rewrites the power balance for every young worker in their first job.

They want to work, they are not getting jobs, and it is the not getting jobs that is damaging them.

LILY-ROSE BISSON, 20, LEEDS · VIA DAZED



The Milburn report that produced the NEET million calls it a moral crisis and names the group a bedroom generation. What has changed underneath the number is the reason. In 2011, 24% of NEETs gave mental health as the main reason they could not work. It is now 43%. Read carelessly, that looks like a generation opting out. The young people living it read the causation the other way round. One 20-year-old in Leeds applied to around 200 jobs before landing part-time waitressing work she was laid off from within weeks, and put it plainly: they want to work, they are not getting jobs, and it is the not getting jobs that is damaging them. The mechanism has hardened too. Automated screening now returns rejections within an hour of submission, and around a third of UK firms report actively hiring older workers over concerns about younger candidates' skills. A UCL study finds the effect scars wages and wellbeing into midlife.

The gap inside this generation is no longer something you can see only in the national statistics. It is now visible across a kitchen table. Average monthly private rent in the UK stands at £1,374, and £2,273 in London, which means renting alone has moved out of reach for people who would once have considered themselves comfortable. Higher earners have been pushed back into the flatshare, and the flatshare has become the place where the class gap is negotiated in person. SpareRoom's research finds that 48% of flatsharers earn under £30,000 while 16% earn over £50,000, and that 43% of renters in shared accommodation report problems caused by wealth gaps in the house. The friction is small and constant: who replaces the washing-up liquid, what counts as reasonable heating, whether a housemate's father can simply transfer £750 to make an unexpected bill disappear.

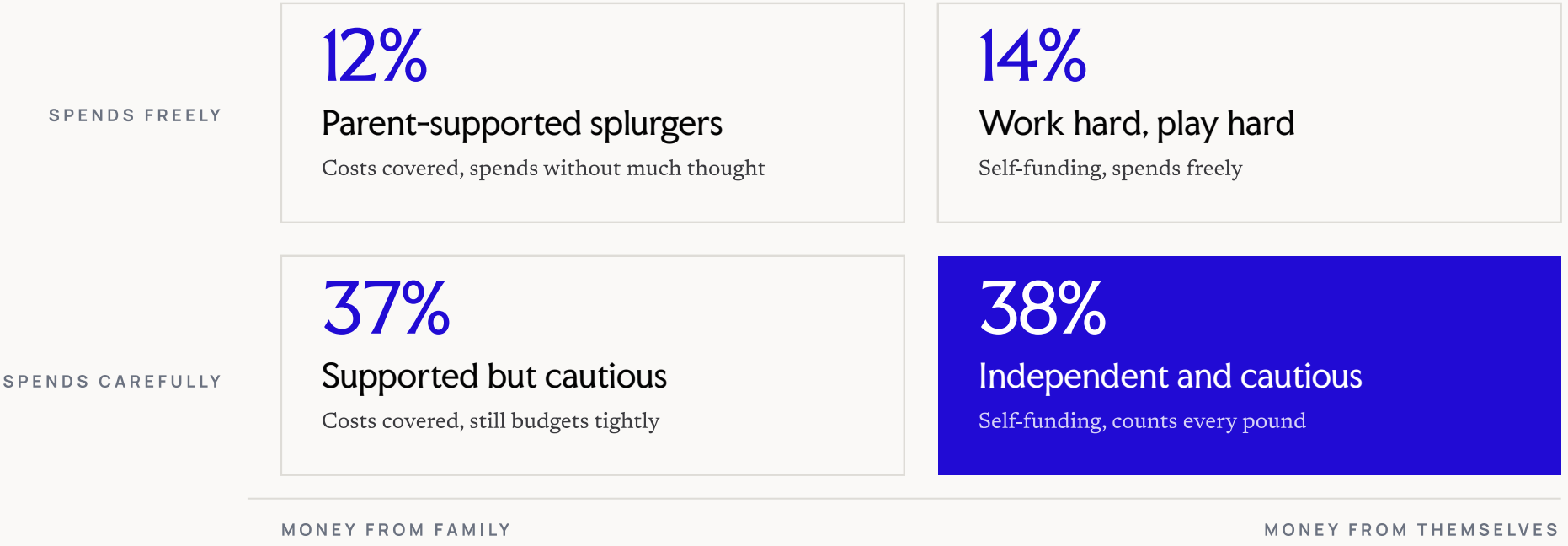
One 25-year-old spent three months contesting a £1,500 electricity error while his housemate wanted to pay it and stop thinking about it. A researcher at the University of Plymouth points out why this is new. Renting was not a housing route for higher-earning middle-class young people until recently, so these disputes are only now surfacing. For a brand, the lesson is uncomfortable and useful. Two people in the same flat, same age, same postcode, same supermarket, can be having completely different financial experiences, and any segmentation built on age and location will put them in the same box.

Where they want to work is scattering in two revealing directions. The graduate rankings tell one story, and it is not the one a startup-obsessed decade predicted: the most-wanted employers among UK students put the Civil Service second and the NHS third, sandwiched between the big professional firms. In a precarious world, the state looks like shelter. The other direction is the one almost no youth-marketing deck has caught up with: the trades. Gen Z employment in UK construction and trades grew nearly 17% year on year, roughly three times the pace of any older cohort, with sector pay rising ahead of inflation, and government money is now flooding toward apprenticeships with a stated ambition of parity with university. The "toolbelt generation" framing arrived from America, but the British version is real, income-led, and gathering: a plumber with a van, a full order book and no student debt is a genuinely aspirational figure in 2026, and brands still picturing young Britain exclusively at a laptop are marketing to half a generation.

Around the job, the hedges. Two thirds of Gen Z earn something from a side hustle, the highest of any generation, averaging a few hundred pounds a month, though the taxman's stricter definition finds far fewer true second businesses than the surveys imply; the honest read is that most side hustles are insurance and identity as much as income. AI sits inside work as both tool and threat, held at once: half of UK workers used AI in the past year and the wage premium on AI skills is real, while 23% of 18 to 24s expect it to swallow most of their job within a few years, nearly double the all-age figure, and the early payroll data on young software developers suggests the fear is not paranoia.

A generation that cannot control the rent controls the £4.50.

THE FOUR QUADRANTS



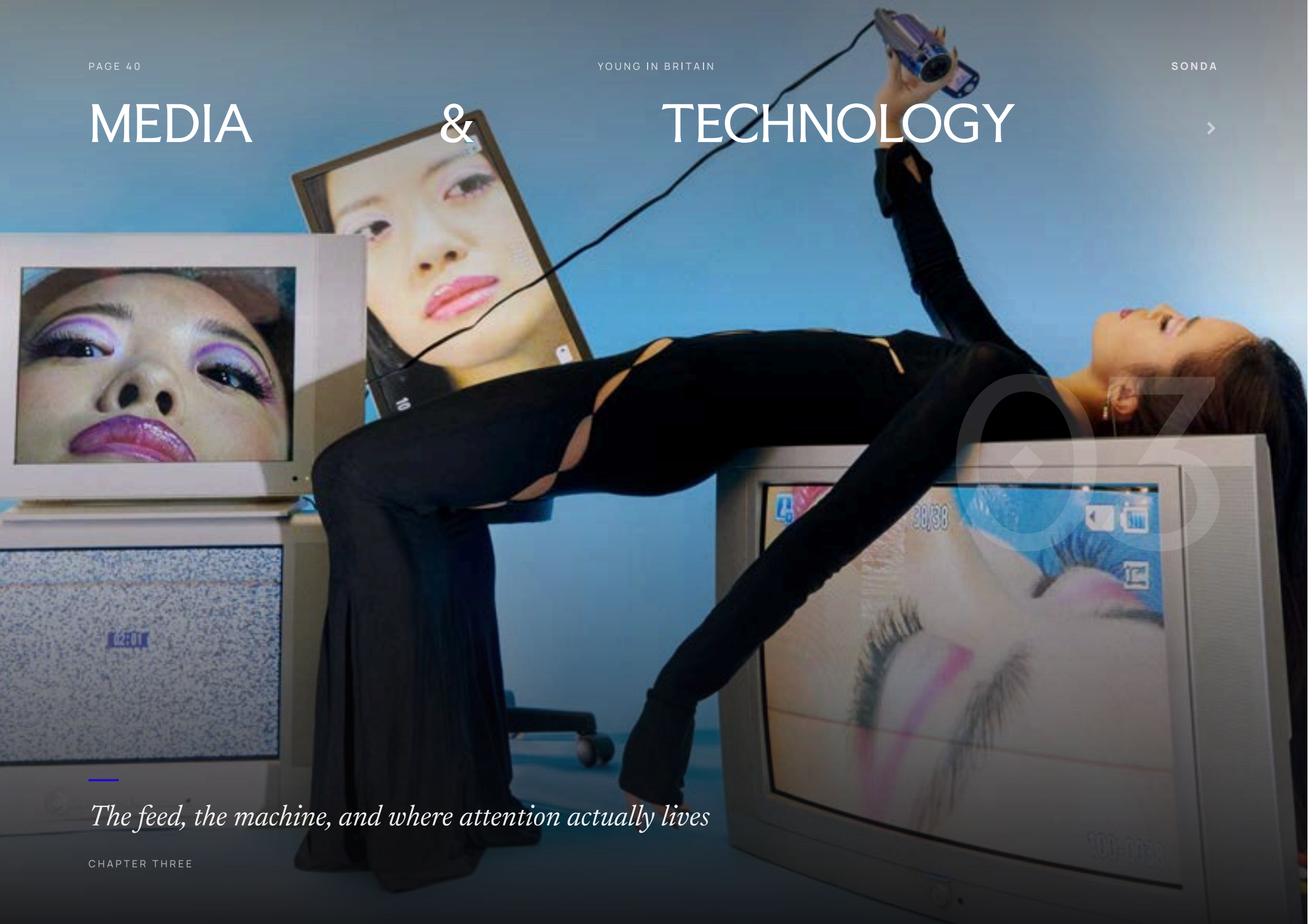
Where the money comes from, against how freely it gets spent. Three quarters of UK 16 to 24s sit in one of the two cautious groups. Two nineteen-year-olds in the same halls can fall in different quadrants and behave like different customers, and the quadrant predicts them better than their age does.

FIG. 04

Their response is the same as everywhere else in this report: hedge inside the system, learn the tool that threatens you. And when the system will not teach them, they teach themselves, on YouTube, on Coursera, increasingly with AI itself as the tutor, because the thing they say would most improve their working lives, more than beanbags, more than purpose statements, is somebody senior taking an actual interest. There is no robust UK statistic on how many young workers have a mentor, which is itself the finding: nobody is even measuring the thing they keep asking for. Into that vacuum, once again, step the influencers. Put the two halves of this chapter together and the shape of the floor is clear. Money is managed with a discipline their parents never needed, inside apps designed like games, against a future they part-fund and part-doubt. Work is wanted, badly, on terms that are neither entitled nor exotic: decent pay, visible progression, flexibility with a point, and someone to learn from. Between the two runs the quiet divider of family money, sorting one generation into those with a head start and those doing it entirely alone. The industry keeps asking why young people's relationship with money and work feels so intense. The answer is that these are the two arenas where effort is supposed to convert into a life, and this generation is running the experiment daily, in real time, on a phone, with the receipts to show which promises paid out.



MEDIA & TECHNOLOGY



The feed, the machine, and where attention actually lives

CHAPTER THREE

18 to 24s spend 6 hours 20 minutes a day online, nearly double the over-65 figure, almost 80% of it on a phone, and just two companies, Alphabet and Meta, take 51% of all UK online time (Ofcom Online Nation 2025). That is the ground truth of young media in Britain: not a channel, an environment. They do not go online; they live with a second world in their pocket, and every brand fighting for their attention is fighting inside it, against everything else it contains.

The platform map, read properly. The single most useful distinction in this territory is the one most media plans never make: reach and time are different purchases. YouTube is the reach king and something more, reaching 94% of UK online adults at 51 minutes a day and functioning, for the young, as default television, the long-form habit hiding inside the short-form generation. TikTok is the time machine: 56% reach but 49 minutes a day among 18 to 34s, the discovery and entertainment engine where trends are born. WhatsApp is the invisible giant, 90% reach with three quarters of online adults in it every single day, the private backbone under everything. Instagram holds the aesthetic identity layer and, increasingly, the DMs; Snapchat owns the youngest and their closest friendships; Facebook was not killed but repurposed into Marketplace and logistics. And two platforms are moving in opposite directions in ways that should reshape spend: Reddit surged 28% in a year to 60% reach, overtaking TikTok as the UK's fourth most-visited social service, yet holds people for barely four minutes a day, because it is not a scroll, it is a reference library, the place young people go to check whether something is true or worth buying.





X, meanwhile, fell from 45% to 39% reach in a year and is now the one major platform where men predominate: a narrower, older, more combative room than the town square it used to claim to be. BeReal, the authenticity app of a thousand trend decks, has quietly left the top ten. Each platform now has a job, and the era of posting the same asset everywhere is a category error: discovery happens on TikTok, verification on Reddit, intimacy on Snapchat and WhatsApp, and the deep watch on YouTube.

The platform story of the last year in Britain is not a new app. It is an old one. Reddit has passed TikTok to become the country's fourth most visited social media site, and it has done it by changing who uses it. For most of its life it carried a reputation as a male space built on gaming and tech, a reputation its own executives accept was earned. Today Gen Z women are a third of the UK user base, and in the United States, its oldest market, the split has moved to roughly even. Globally, daily active users went from around 50 million in 2021 to 116 million in 2025. What draws people is the structure rather than the content. Reddit is not a feed of performances. It is a room of people talking, mostly anonymously, mostly about a specific problem. One 27-year-old described the appeal as its plainness, no theatre, just people talking, and contrasted it with TikTok, where the content feels staged and the design keeps you there. Reddit lets you get what you came for and leave. That is not a small distinction for a generation that describes itself as tired of being optimised at. For brands, this is the highest-value listening surface in Britain right now and the least forgiving to enter. Reach into it is real: 74% of Reddit users say the platform influences their purchasing decisions, and it reaches people other channels miss, with 74% of users not on LinkedIn and 39% not on Instagram. But the room sets its own agenda, which the brand chapter returns to.

Attention is earned against everything, not against competitors.





The feed is short-form-dominated, and the same cohort binges three-hour podcasts, forty-minute video essays and full seasons in a weekend; the appetite is not for brevity but for control over pace, which is why sped-up playback is a default habit and why the skip button is pressed reflexively. They are also the most ad-resistant audience in the country by both behaviour and spend: over a third of 16 to 24s run ad-blockers, and the young are the likeliest to pay for premium tiers precisely to remove advertising. Put plainly: when a brand's content appears, it sits next to Netflix, the group chat, and the game they were mid-way through, and nobody owes it a second. The bar is not "better than the competitor's ad". The bar is "worth choosing over the thing they were already enjoying", which means entertainment, usefulness or an experience, and nothing less.

One 27-year-old described using Reddit to run background checks on companies before buying from them, looking for allegations and complaints. The verification step is no longer the brand's website or a review score on the retailer's own page. It is a room of strangers with no incentive to be kind.

The algorithm is not a mystery to them; it is a negotiation. They know, roughly correctly, how the machine works: TikTok's For You page ranks on interactions, video information and device signals; Instagram and YouTube run on engagement prediction and watch history. What is genuinely new is the folk craft that has grown around that knowledge.

Young users train their feeds deliberately, punishing content with "not interested", starving topics they want gone, feeding niches they want more of. They invented a parallel vocabulary, algospeak, "unalive", "seggs", the whole coded lexicon, to route around moderation, a linguistic shift significant enough that it produced a bestselling book by a 24-year-old linguist last summer. And a counter-current is gathering that any media planner should watch: algorithm fatigue. Only a third of UK adults now think the internet is good for society, down seven points in a year, and the response among the young is a quiet turn back toward human curation, the friend's recommendation, the newsletter, the group chat's verdict, the deliberately dumb phone bought as a gesture. Google itself is changing under them: AI summaries now sit on around 30% of UK searches, and over half of users say they routinely see them, which means the click that used to reach a website increasingly dies in the answer box.

The feed went private, and measurement hasn't followed. The defining structural shift of this era is that the centre of social gravity moved from the public post to the private message. Sharing through DMs and close-friends stories now outpaces the public feed; a large minority of the young keep a second, private "spam" account for their real life; and the platform data shows shares rising sharply even as follower growth stalls, which the industry keeps misreading as decline when it is actually the point. The real conversation about any brand happens in rooms no dashboard can see, ratified by one screenshot and one line of commentary. The practical test this report keeps returning to: is anyone forwarding this? If content is not being screenshotted into a chat, it is not working, whatever the public numbers say.

Creators are the new media companies, and the proof is on the shelves. The UK's biggest youth media brand is not a broadcaster; it is seven men from south London. The Sidemen sit on more than 155 million combined subscribers and have converted attention into an actual conglomerate: a clothing line, a subscription service, XIX Vodka, a cereal that sold 100,000 boxes in its first fortnight in Tesco, a fried-chicken chain expanding toward twenty restaurants, and now their own venture-capital firm.

79%

Of 16–24s use AI tools. Trust in the technology has not risen a point since 2023.



The pipeline runs the other way too: GK Barry went from TikTok clips to the fifth-biggest podcast in Britain to a Loose Women seat and an arena tour, the new fame ladder climbed in full public view. But the same economy wrote its own cautionary tale, and every brand considering a creator partnership should study it: PRIME, the KSI and Logan Paul drink that was 2023's playground currency, saw UK sales collapse by more than 70% in a year, its bottles discounted to 31p. Creator brands skip every step of the awareness funnel and then meet the same judge as everyone else, the second purchase. Virality is a launch mechanic, not a moat; only product survives.

News reaches them sideways, when it reaches them at all. Three quarters of 16 to 24s get news through social media, and the profile of how is precise: the clipped podcast moment, the creator explainer, the pushed alert, almost never the bulletin. Broadcast TV's weekly reach among 16 to 24s fell from 78% to 48% in five years, and while the BBC hit its target of four million under-35 iPlayer accounts, its linear grip on the young is gone; the shows that actually carry current affairs to this cohort are The Rest Is Politics, The News Agents and PoliticsJOE, cut into vertical clips. Two findings complicate the doom narrative. Young people who use social media for news rate its trustworthiness more highly than older people rate it, so the trust gap is generational in both directions. And the biggest barrier is not apathy but comprehension: under-35s are four times more likely than their elders to avoid news because they find it too hard to understand, 42% of 18 to 24s avoid it at least sometimes, and 42% now ask an AI chatbot for news weekly. The audience did not stop caring about the world.



The formats stopped speaking their language, and the machine stepped into the gap.

Virality has a mechanism, and 2025 wrote the textbook. The spread pattern is consistent: seed on TikTok, screenshot or clip into the group chats, amplify across Reels and Shorts, with remixable audio as the main vector. The year's case studies show the range. Labubu, a blind-box toy, went from niche to 3.3 million posts and a billion views once celebrities were photographed with one. "6-7", a genuinely meaningless catchphrase from a drill track, became Dictionary.com's word of the year, proof that virality needs no content at all, only remixability. The Coldplay kiss-cam clip showed how a single unplanned moment becomes a template for a million jokes. And the one every British marketer should frame: the Jet2 holiday advert, a year-old voiceover with a Jess Glynne track, became the involuntary soundtrack of 2025, attached to every disaster clip on the internet, handing the airline more cultural presence than any media budget could buy, entirely by accident. The lessons are uncomfortable for planners: the biggest brand moment of the year was unplanned, remixability beats polish, and the trend cycle has compressed to the point where even the trend forecasters found 2025 hard to name. A brand with a six-week production pipeline chasing a three-week trend arrives, every time, as the last guest at a party that has moved house.

The kit tells its own story. Young Britain is decisively iPhone country, 69% of 16 to 24s against 31% on Android, the sharpest Apple skew of any age group, with the blue-bubble social pressure doing quiet enforcement underneath. But the relationship with hardware is maturing in ways that cut against the gadget-generation cliché: phones are kept longer, over half of UK handsets are now at least eighteen months old, refurbished is mainstream among the young, and the growth categories are not screens at all. The camera revival is the telling one: compact digitals and film cameras are genuinely back, a third of the world's active film-camera users are under 30, manufacturers are increasing production, and the stated reason, in a hundred interviews, is escape from algorithmic perfection, the grainy photo as proof of a real night.

51% SHARE OF ALL UK ONLINE TIME TAKEN BY TWO COMPANIES: ALPHABET AND META.

OFCOM, 2025





The wrist completed the same turn toward the body: smartwatch ownership peaks among the young, and the culturally loaded objects are the screenless ones, the Oura ring and the WHOOP band, sleep scores traded like match stats. The pattern across all of it is the one this report keeps finding: technology bought to measure, control and authenticate a life, not to display one.

The virtual worlds that actually exist are not the ones that were promised. The VR headset, five years after the metaverse pivot, remains a niche gaming accessory: shipments fell by more than 40% last year, the corporate metaverse products are being shuttered, and even among teenagers who own a headset, almost none use it daily. Meanwhile the actual virtual worlds thrive in plain sight, on phones. Roblox reached 144 million daily users and is aging up fast: over a quarter of its age-verified users are now adults, its fastest-growing cohort is 17 to 24, and that older group spends 40% more than the children the platform is famous for. Fortnite carries the concert lineage, from Marshmello to Travis Scott's 27 million attendees, into a venue young adults still treat as a place. The rule for brands entering either is now well evidenced and unforgiving: native gameplay earns its place, a playable thing worth playing, while billboard logic, the logo dropped into someone else's world, is ignored at best and screenshotted for mockery at worst.

And the machine moved in, further than a usage statistic can show. The AI layer, new since 2022, is now simply part of young daily life: 79% of 16 to 24s use AI tools, ChatGPT logged 1.8 billion UK visits in eight months, and the uses are mundane and revealing in equal measure, fun and exploration first, then finding things out, then work, then advice. But underneath the utility sits something closer to companionship than the industry likes to admit. A third of UK 11 to 16s who talk to an AI chatbot say it feels like one of their friends, and a third have told it something they would not tell a parent, a teacher or an actual friend (Vodafone). Among the most vulnerable young people the number goes further still, more than a quarter say they would rather talk to the chatbot than a person, because it is always there and it never judges.

It is the same openness-in-public, shame-in-private pattern this report found in the mental health chapter, now with a machine standing in for the friend who was supposed to hear it first. The evidence on whether this helps or harms genuinely splits down the middle, one major study found AI company reduced loneliness about as well as a human conversation did, another found the heaviest daily users grew lonelier, not less, and both are probably true of different people, which is exactly why a brand should tread carefully here, not confidently. Underneath the companionship sits plain fatigue, not a movement so much as an ambient guilt: most 16 to 24s say they use their phone too much, and a striking near-half of 16 to 21s say, given the choice, they would rather have grown up without the internet at all. Nobody is deleting the apps. They are just increasingly certain they should.

Trust in the technology itself has not risen a point since 2023 even as adoption tripled, demand for labelling grows, and the anti-slop instinct hardens: they use the tool constantly and resent the symbol, exactly the split this report found in music and will find again in advertising. The generation that lives furthest inside the machine is also the one most determined to know where the humans are, and increasingly, the one quietly wondering whether it should be confiding in a machine at all.

What this chapter hands to a brand is a map with three markings on it. Attention is competed for against all of culture, so the price of entry is being genuinely worth watching. The feed is where things are found and the chat is where they are decided, so build for the screenshot, not the like.



Discovery on TikTok, verification on Reddit, intimacy on Snapchat and WhatsApp.



And the machine layer, the algorithm negotiated, the AI consulted, the summary that swallows the click, is now part of how anything reaches them at all, which makes being legible to it infrastructure, not innovation, and makes playing the friend rather than the tool a genuine risk rather than a growth hack. The next chapter follows the thread into the rooms the dashboards can't see: the friendships, the dating, and the communities on the other side of the screen.

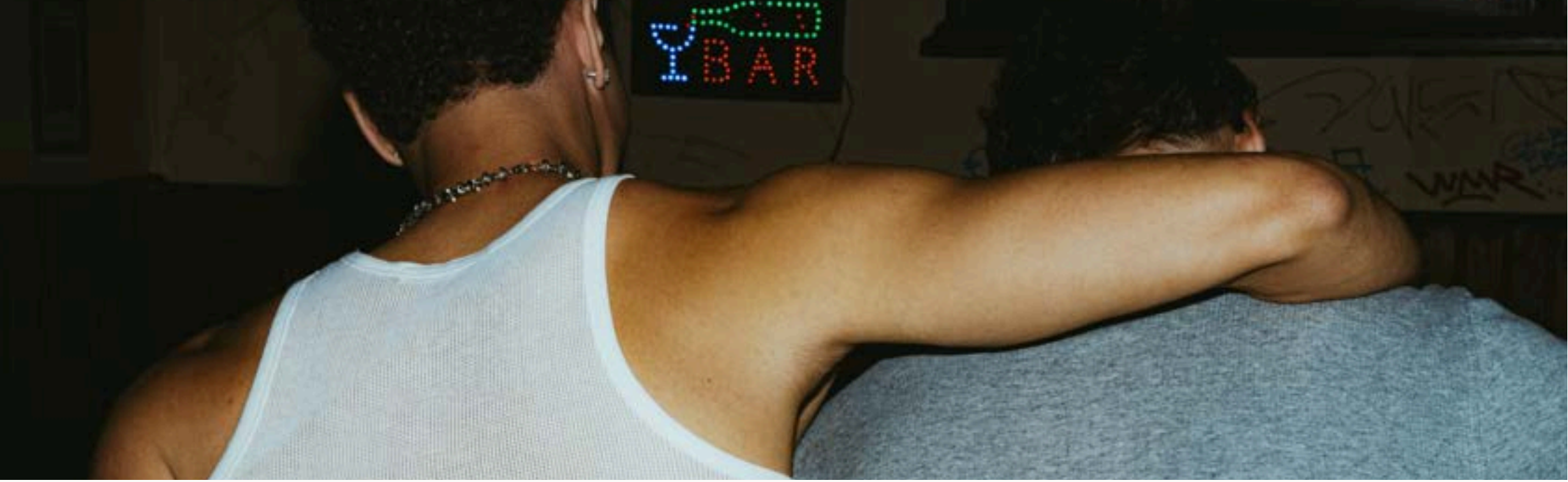
The click that used to reach a website increasingly dies in the answer box.

FRIENDSHIP, DATING & COMMUNITY



The people, and the rooms they gather in

CHAPTER FOUR



The loneliest age group in Britain is not the old. It is the young. In April 2025, 31% of 16 to 29s reported feeling lonely at least some of the time, against 16% of the over-70s (ONS), and by several European comparisons young Britons are the loneliest of all. That single inversion, the assumption that loneliness lives in a care home rather than a shared flat, is where any honest account of young connection has to begin, because almost everything a brand thinks it knows about this cohort's social life is filed under the wrong age.

The friendship recession is real, but the panic is aimed at the wrong person. The headline evidence is Onward's: the share of under-35s with one or no close friends trebled in a decade, from 7% to 22%, while those with four or more close friends fell from 64% to 40% (2021, pandemic-inflected, and dated as such). Something genuinely thinned. But the story the internet tells about who is most affected is largely imported and largely wrong. The viral figures about men with no friends at all, the collapse from a third to a handful, are American, and the UK data runs the other way on age: young British men are the least likely group to report having no close friends, around 7% of under-24s against 19% of the over-55s (Movember UK). The real male deficit is not headcount but disclosure, only around half feel able to talk to friends about what is actually wrong, and the far sharper British finding is one nobody is merchandising: young women are the lonely ones.



Half of 18 to 24 women reported loneliness in 2025, the highest of any single group, their life satisfaction sliding while young men's held (Belonging Barometer). A brand building a "male loneliness" proposition on the American numbers is solving a problem that, in Britain, belongs more acutely to someone else.

What thinned the friendships, more than anything, is money. Friendflation is the least glamorous and most important idea in this chapter. Socialising now costs an average of £375 a month, the set-piece obligations have become genuinely exclusionary, a hen or stag weekend runs to £779 at home and past £1,200 abroad, a wedding £700 a head for the 25 to 34s expected to attend several a year, and the everyday baseline moved too: eating and drinking out rose more than 50% in a decade. Underneath the individual costs sits the structural one this report keeps returning to, the disappearance of the free third place. The youth club, the park bench, the cheap pub corner, the places you could simply be with people at no charge, have thinned, and almost everything that replaced them has a price on the door. Friendship did not just get harder to schedule. It got repriced, and for the poorest young people that functions as quiet exclusion from the very contact that protects a mind.

The flatshare deserves a mention here as well as in the money chapter, because it is where a lot of this generation's daily social life actually happens, and because it has become harder. When 43% of shared-accommodation renters report problems caused by wealth gaps in the house, what that describes is not a financial statistic. It is an ongoing negotiation with people you live with over heating, cleaning, and whose standard of normal wins. Living with people you did not choose, at incomes you cannot match, is now a routine feature of being in your twenties in Britain.

The people inside it describe it in harder terms than the statistics do. One 25-year-old, out of work and watching his twenties go by, said he and the people around him had been left to rot, and called them a lost micro-generation. That is not self-pity. It is an accurate description of what happens when a cohort is asked to wait out an economy that has no plan for them.



The screenshot into the group chat is the most powerful marketing asset in Britain, and no brand owns it.



The group chat is now the smallest unit of society, and it is where trust actually lives. When young people are asked what makes them feel connected, in-person time wins decisively over anything on a screen, and yet the maintenance of friendship has moved almost entirely into the phone, the group chat running all day as a kind of ambient hearth, the meme forwarded in place of a phone call, the plan half-made and half-abandoned. This matters commercially more than almost anything else in this report, because the group chat is not just where friends talk; it is where they decide. A product is vouched for, a brand is mocked, a recommendation is ratified, all inside a room no dashboard can enter, and the whole influence economy of later chapters runs on this simple fact: the screenshot into the group chat is the most powerful marketing asset in Britain, and no brand owns it. Discord has quietly become the structural version of this, a quarter of a billion people using it monthly and most of them, now, for things other than gaming, the interest-group campus where the belonging that used to come from a postcode gets rebuilt around a shared obsession.

But the group chat that actually holds this generation together most days is not the friend one; it is the family one, and the closeness it reveals cuts against the story about a generation drifting from its parents. An estimated 34 million UK adults now sit inside a family group chat, exchanging around 19 messages a day across three generations, and for close to four in five of them it is the first place personal news gets shared, ahead of a call to mum (Vodafone).

Contact stays intense even where distance grows: the majority of 18 to 24s message a parent at least once a week, and parents remain the single most trusted source of financial and career advice well into the mid-twenties, snowplough parenting having simply migrated from the school gate to the WhatsApp thread. None of this should be romanticised into a universal warm-family default, though. A meaningful minority are not close to family at all, on the last serious UK estimate around one in five families carry some form of estrangement, and this generation carries more children of divorce and separation through into adulthood than any before it. The emotional register of staying financially entangled with parents, still on the family phone plan, the shared streaming login, well into a first salary, is not simple gratitude either; it runs alongside real guilt and, for some, quiet resentment at not yet being fully independent. And family itself is not one shape: multi-generational households are far more common in British Asian communities than the white British norm, while lone parenthood is the more common pattern in British Caribbean households, which means a brand's mental picture of "family" should flex by community rather than default to the same two-parents-two-kids image for everyone. The instruction is the one this report keeps repeating in different rooms: earn a place in the family group chat the way you would the friend one, useful or funny enough to be forwarded, and always leave an exit for the people for whom family is not the safe word it is for everyone else.

Dating apps are not dead, but the era of the swipe is visibly ending. The UK's top dating services shed roughly a sixth of their users in a year, Tinder alone losing around 600,000, Bumble cut a third of its global staff, and both major listed players trade at a fraction of their 2021 highs (Ofcom; company filings). Around five million UK adults still use them and 18 to 24s remain the highest-reach group, so extinction overstates it, but the mood has curdled: burnout, safety fatigue, and a widespread sense that the apps optimised for everything except actually meeting.

22%

Of under-35s have one close friend or none. A decade ago it was 7%.

ONWARD, 2021

We've been left to rot. We're a lost micro-generation.

DAVE MARSHALL, 25 · VIA DAZED

Safety is not a footnote to this, especially for young women, 46% of 18 to 24 women feel unsafe walking alone after dark, up on the year, and that single fact shapes how, when and whether a whole cohort dates, socialises and travels home. What is replacing the app is real but should be described honestly: the run club is the emblem, explicitly framed now as the anti-Tinder, alongside singles nights built on padel or pottery, hobby-first meeting, the return of being introduced. It is genuine, it is growing, and it is metropolitan and largely paid, so a national generalisation is unsafe and the class gate reappears the moment you look at the door charge.

Underneath the dating story sits a deeper realignment, and it is becoming a romantic problem. Young women are moving left and young men, in parts, right, the Green-leaning young woman and the Reform-curious young man now a measurable feature of the same generation and, increasingly, a friction inside the same dating pool. The gap in feminist identification between young men and women is the widest of any age group, and academics have started naming the resulting "heteropessimism", a documented, partial turn by some young women away from heterosexual dating altogether. The manosphere sits behind the male half of it as an information environment more than a belief system, near-universal exposure, minority conviction, and the honest reading is not that young men have radicalised but that young women have mobilised faster than young men have moved anywhere. Calibrate the temperature, though: this is a real divergence, not a war, and the framing that pits every young man against every young woman overstates what the data actually shows.

And here is the finding that should stop the "they've rejected everything" narrative cold: they haven't. The milestones were deferred, not abandoned. Marriage sits at its oldest ages ever recorded and the fertility rate hit a record low of 1.41, and yet 86% of unmarried under-30 women and 80% of unmarried under-30 men still say they want to marry, nine in ten young women still hope to become mothers, and the desired family size, 2.3 children, has barely moved (CSJ, 2026). What changed is not the aspiration but the affordability of it.



This is a generation postponing the traditional script under economic constraint while privately still wanting most of it, which is a profoundly different proposition from the one sold in most trend decks, and a far more useful one for any brand whose products touch homes, weddings, families or the long arc of settling down.

Which brings the chapter to its real commercial heart: community, and the brands learning to build it. The macro-shift is from inherited community to chosen community, from the belonging you were born into, the parish, the street, the extended family, to the belonging you opt into around an interest. And into that shift a handful of brands have moved with genuine skill. Gymshark is the case study every marketer should know: a Birmingham garage brand that grew community-first into a billion-pound valuation, whose lifting events are run explicitly as celebrations rather than sales, whose 66-day challenge turned customers into a movement with a shared uniform. The lesson it teaches is the one most "brand community" initiatives fail: community is autonomy and genuine value handed to members, not a hashtag and a discount code, and this cohort can tell the difference in seconds. The reading renaissance shows the same mechanism from the other direction, BookTok pushing nearly eight in ten young readers to read more and library visits up sharply, then spilling off the screen into silent book clubs and run-and-read meetups, a chosen community forming around a shared pleasure with no brand required at all, which is precisely why the brand that facilitates it rather than colonising it wins.

The milestones were deferred, not abandoned.

ON MARRIAGE AND CHILDREN



Some of the most functional community this generation has is with people they will never meet. The subreddit works because it does something the friendship group cannot: it finds the handful of people anywhere in the country going through the exact same specific thing, at various stages of it, and lets you compare notes anonymously. One 24-year-old described posting about a medical condition and a television obsession under the same account, with nobody able to connect either to her. That combination, total specificity plus total anonymity, is not available offline. It is worth being precise about what this replaces. It is not friendship. It is the expert and the support group, both of which have become harder to access, reassembled out of strangers.

The in-real-life revival is real and large, and it runs on money. The gym is the strongest evidence, a record 11.5 million UK members with Gen Z the clear driver, young people increasingly choosing the gym over the pub as the place to see people. Padel more than doubled in a year to 860,000 players, tennis hit participation records, run clubs became a genuine social infrastructure. But the through-line of the whole chapter reasserts itself at the end: almost every one of these new third places costs money. A padel court is around £7 a head an hour, roughly a month of budget gym membership for a single game; the run club centres on the paid coffee and the kit; the festival, the class, the club night all carry a price. The free civic infrastructure shrank and the paid replacements boomed, which means the connection economy is quietly sorting young people by what they can afford, and the equity-minded brand, the one that builds the free session, the park meetup, the no-spend format, is not just doing good but walking into open and uncrowded space.

Pulled together, the picture a brand should carry out of this chapter is specific. This is a lonely, relationship-hungry cohort whose friendships are strained by cost, whose dating has moved from the app back toward the room, whose deepest social decisions happen in a chat you cannot see, and whose community has migrated from the inherited to the chosen.



The opportunity is not to advertise into that world but to host a room inside it, and the test of whether you have built something real rather than a marketing veneer is the same test that runs through this entire report: does it survive without the discount, and would anyone show up if you stopped paying for the reach. The next chapter follows them out of the private rooms and into the public ones, to the food, the drink and the night out, where belonging gets performed in front of everyone.

FOOD & DRINK



What they eat and drink, and how the night changed shape

CHAPTER FIVE

If you want to understand what young Britain now does with the money, the time and the identity it once spent on going out, follow the food. Food and drink have quietly become the primary arena in which this generation performs status, builds ritual, signals values and finds each other, and the brands that grasp this are not selling calories or units of alcohol. They are selling belonging, content and a manageable treat inside an unmanageable economy.

Start with the correction that every drinks brief in Britain gets wrong. "Gen Z doesn't drink" is the most repeated line about this cohort and it is half true in a way that misleads. On the abstinence side the numbers are real and record-breaking: 39% of men and 31% of women aged 16 to 24 did not drink at all in the past year, the most teetotal young cohort the national health survey has ever measured (NHS Health Survey for England 2024). But the drinks industry's own tracking now pushes back hard, and the honest reading is polarisation, not sobriety. IWSR, the sector's data authority, reports that UK Gen Z drinking participation climbed from 66% three years ago to 76%, month-long abstinence among young drinkers fell over a single year, and its managing director went as far as to call the moderation narrative

"conclusively debunked". Both things are true at once: this generation contains more committed non-drinkers than any before it, and its drinkers are re-engaging on new terms, drinking less often but spending more when they do. The instruction for brands is to bin the monolith. There is no single young drinker; there is a committed abstainer, a mindful "less but better" drinker, and an occasion drinker, and a portfolio that speaks to only one of them is speaking to a fraction of the market.





The clearest proof of the new logic is that alcohol-free stopped being a punishment and became a category. Around 200 million pints of no and low beer were expected to be drunk in 2025, up nearly a fifth on the year and now 2.7% of the entire beer market, a category that has grown many times over in a decade (BBPA). Nearly half of adults now drink low or no at least sometimes, up from a fifth in 2021 (Drinkaware). The behaviour that makes this stick is "zebra striping", alternating alcoholic and alcohol-free across a single night, which turns moderation from a binary choice into a dial, and roughly one in three pub visits is now completely alcohol-free. Lucky Saint built a genuine brand on this, on draught in around a thousand pubs, and Guinness 0.0 leads the category by value, which matters because it points at the drink of the moment.

Guinness is the defining youth drink story of the cycle, and it is a masterclass in accidental virality that brands should study rather than envy. The "split the G", the game of trying to drop the level of the first gulp to the middle of the G on the glass, spread across TikTok on tens of millions of views, boosted by a backstage clip of Niall Horan and Ed Sheeran and then by everyone from Kim Kardashian to the Princess of Wales being seen with a pint. Sales surged, volumes up double digits, its off-trade share climbing sharply, and Diageo reported a marked rise in young women drinking a stout that used to read as a rugby-club drink. Crucially the brand did not manufacture the trend; it noticed one its drinkers had invented and amplified it without smothering it, which is exactly the ritual-earning move that later chapters return to. It also over-heated: a 2024 supply shortage and a cooling in mid-2025 are the honest footnotes, and the lesson underneath is that virality is a supply-chain problem as much as a marketing win, because both Guinness and, in food, the Dubai chocolate craze hit shortages at the peak of demand.

When they are not drinking, the same social and status energy has flowed into a handful of non-alcoholic drinks that now carry real cultural weight.



£46m

UK matcha import revenue in 2025, more than double the year before.

Matcha is the standout, the green tea powder that became a lifestyle: UK import revenue more than doubled to around £46 million in 2025, matcha drink sales tripled in a year, a global shortage forced rationing in Japan, and a young chain called Blank Street built much of its rise on it, growing UK turnover more than threefold and courting a billion-pound valuation, with Caffè Nero, Starbucks, Costa and even Greggs all launching matcha to chase the same customer. The run-club coffee, the aesthetic iced cup, the speciality flat white: these are the everyday treats that do the social work drinking once did, photographed, shared, met over. Energy drinks hold the young male end, Red Bull and Monster still dominant while PRIME surged and slumped, with a ban on high-caffeine sales to under-16s incoming. The through-line is that the cup in hand is now an identity object, and a drinks brand that ignores the non-alcoholic daytime occasion is ignoring where the growth and the content actually are.

On the food itself, the master pattern is the barbell from the money chapter, made edible. Young people trade ruthlessly down on the staples so they can trade up on the treat.

Underneath sits relentless value-engineering: the meal deal as a genuine cultural institution complete with its own online discourse about how to beat the system, Aldi and Lidl at record market shares pulling younger multi-shoppers, Too Good To Go and budget-cooking content, all driven by food inflation that keeps price permanently front of mind. And on top of that thrifty base sits the little treat, the crookie, the £4 matcha, the viral bar of Dubai chocolate that sold out on limited runs and forced two-per-customer limits in the supermarkets. The same 22-year-old runs both programmes at once, coupon discipline on the weekly shop and cheerful indulgence on the daily treat, and a food brand that understands the barbell dual-tiers its offer accordingly rather than pitching everything at the middle, which is precisely where young spending has thinned.

Then there is the response nobody's forecast contained, which is that some of them have started picking food out of hedges.

Foraging has moved from rural hobby to urban practice across British cities, with wild food walks running in Sheffield, coastal Kent, Leeds and east London. Google searches for foraging are up by a third year on year, Waitrose reports a surge in customers looking for recipes using foraged ingredients, and TikTok foragers have built audiences in the hundreds of thousands posting wild garlic toast and birch twig biscuits. The interesting part is that the people doing it rarely lead with money. They lead with the nervous system. A 27-year-old described it as the only time she walks slowly. A 28-year-old framed it as cutting her plastic consumption and as a practice of presence. The financial logic is real and the practitioners will confirm it when asked directly, that a handful of nettles and wild garlic is a meal you did not pay for, but it is not the story they tell about themselves. That gap is the finding. This generation is repeatedly converting economic constraint into practice and identity, and the conversion is not cynical. It is how a hard thing is made liveable.

There is a signal at the leading edge worth flagging, though it is not yet a British norm. Among Highsnobiety's self-selected global audience of early adopters, 71% now say groceries are a form of lifestyle expression or cultural capital, and grocery spend rose faster than any other category in that group. That is a taste-making minority in a global sample, not a measurement of young Britain. But it points the same way as the domestic evidence. When Pion asked UK 16 to 24-year-olds what they loved, Sainsbury's came eighth nationally and third among the most careful spenders, ahead of most fashion and tech. The supermarket has stopped being the boring part of the shop.



Guinness did not manufacture the trend. It noticed one its drinkers had invented.

It has become somewhere identity is expressed, at both ends of the income range, for completely different reasons.

Two forces now shape what "healthy" food means to them, and both are commercial gold with an ethical edge. The first is protein, the nutritional obsession of the decade, gym-driven and everywhere, high-protein claims quadrupling on packs over a decade and spreading from shakes to cottage cheese to snacks. The second is the arrival of GLP-1 weight-loss drugs into mainstream life, an estimated 1.6 million users in Great Britain and the language of "food noise" entering wellness discourse, though direct use among 16 to 29s specifically is a genuine data gap and the audience skews older and female. But the cultural weight of the drug lands well beyond its actual users: the return of visible thinness as the aspirational body, the so-called Ozempic body, has quietly remoralised being thin and being fat for a generation that had only just been told neither was a measure of worth, and that pressure is felt by plenty of people who have never taken the drug and never will. Both trends carry a caution this report takes seriously: an eating-disorder-adjacent edge runs through protein-maxxing and weight-loss culture, and brands courting a young audience should ride the demand for function and fuel while staying well clear of weight-loss framing, which for this cohort is closer to harm than to helpful.

On values, the honest story is that plant-based behaviour outlived plant-based identity. Hard veganism has plateaued and in places retreated, Veganuary intentions softening and vegan lines being trimmed from chains, yet more than a third of adults still plan to buy plant-based in January, because the flexitarian behaviour persists even as the label fades. The more commercially urgent values story is halal, a large and fast-growing market tied to the young, digital, brand-aware British Muslim population from the opening chapter, under-served enough that the country's first drive-thru halal butcher counts as news, and a real opportunity for food brands willing to treat it as a market rather than an afterthought.



Now the night out, which was not abandoned so much as rebuilt around the same forces. The nightclub is in structural decline, closing at around three net venues a week, the late-night sector down more than a quarter since 2020, with some forecasts warning of a "last night out" before the decade is out (NTIA). The causes are the ones running through this whole report: a night out now costs real money, pre-drinking has moved the spend home, students are cutting back, drinking is down, and safety fear is a genuine structural force, especially for young women, with around a million UK adults spiked in a year, women the majority of cases, and roughly seven in ten 18 to 24s anxious about it. That anxiety reshapes when, how and whether a whole cohort goes out, and it finishes the night earlier. One image captures the shift: in London there are now more 24-hour gyms than late-licensed nightclubs.

But the demand for being out together did not vanish; it migrated to formats that suit the new mood. Competitive socialising is the clearest winner, venue numbers up 84% since 2018, the darts and mini-golf and shuffleboard bars, Lane7 and Flight Club and Swingers and Toca Social, where 41% of Gen Z have already been and nearly half more want to go, because these venues offer a reason to be there beyond drinking, a shared activity that works whether you are on pints or on Lucky Saint. The pub is holding among the young precisely because it now reads as sober-friendly, a place to sit rather than a place to get drunk.



Coupon discipline on the weekly shop, cheerful indulgence on the daily treat.



And the daytime social, the run-club-to-brunch, the coffee rave, the day party, the padel game, absorbs the rest. The night did not die. It moved earlier, cost less per head at the door, added an activity, and made room for the person not drinking.

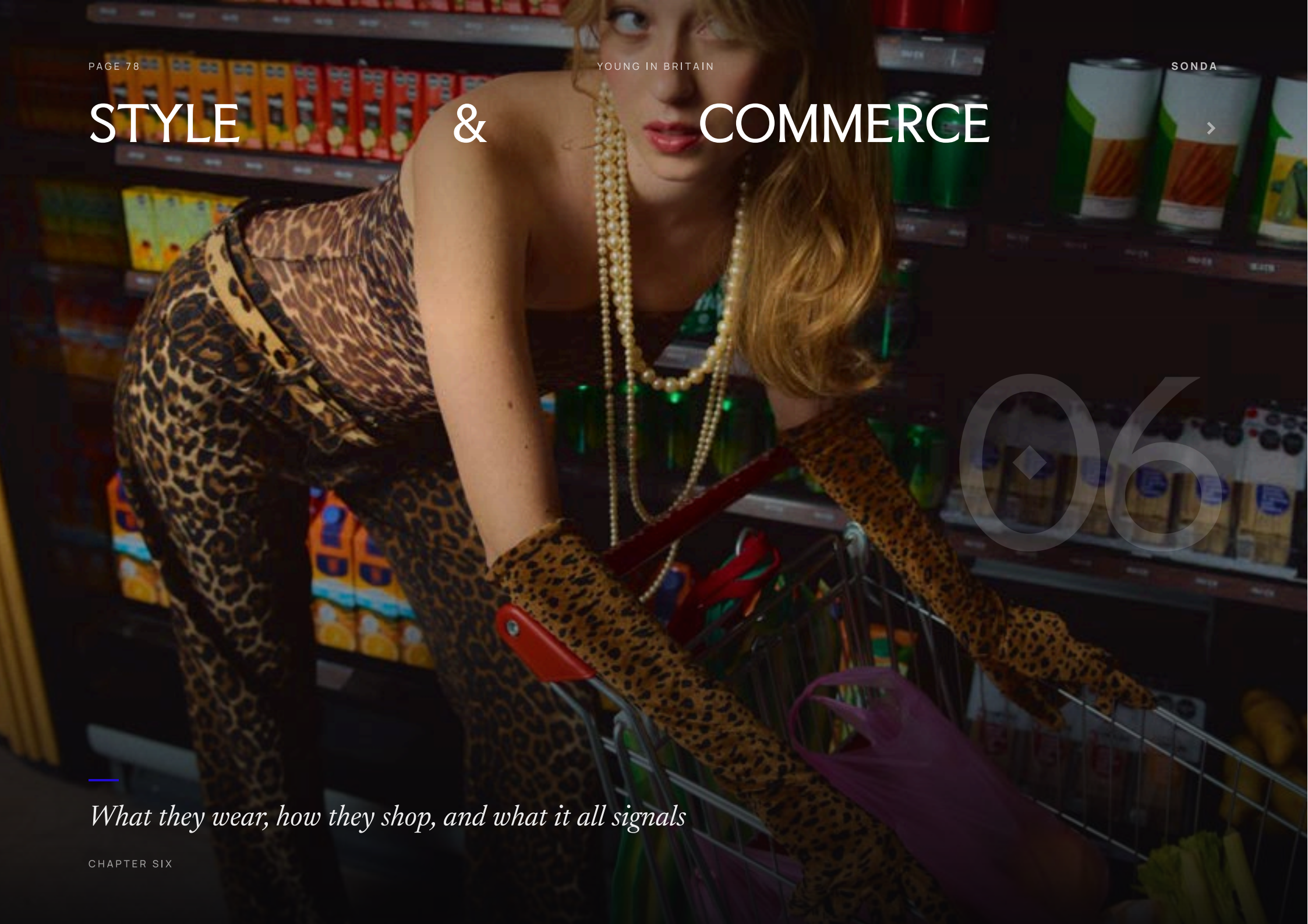
Eating out is where the cultural icons live, and Greggs is the one every brand should study. Greggs crossed £2.15bn in sales in 2025, opened another 121 net shops, and did it while deliberately chasing a younger customer, adding matcha, protein salads, pizza and iced drinks, and turning a sausage roll into a wax exhibit at Madame Tussauds on a velvet cushion, the kind of self-aware cultural move that money cannot usually buy. Its genius is the value chapter and the treat chapter fused: it is cheap enough to be a daily habit and beloved enough to be an identity, the "for us" brand that middle-class students adopt precisely because it is coded working-class, which is the exact trick this report keeps finding at the winning end of youth commerce. Around it, McDonald's, KFC and Nando's remain youth institutions, and the food hall and street-food market provide the premium, photographed end of eating out.

Against that, the fast food counter holds its ground, and the reason is not price. Pion's 2025 study of 2,131 UK 16 to 24-year-olds puts food and drink second of thirteen sectors for spending enthusiasm at 59%, and puts Greggs top of every brand in the country at 90%, ahead of YouTube, Netflix, H&M and Nike. Among the group with the tightest budgets it reaches 97%. McDonald's sits at 88% and Subway at 85%. Look at what those three actually did. Greggs replaced points-per-pound with something a person can hold in their head: buy a set number of items in a category and the next one is free. Subway collapsed a tiered points system into a flat 10% back. McDonald's ran a campaign co-authored with young people across the UK built on the regional names they already use for it, Maccers, McD's, Maccys, McDizzles. None of that is discounting. It is the removal of friction and the recognition of language people were already using. The pattern across all three is that the brand did not reinvent itself to be relevant. It got simpler, and it listened to what it was already being called.

Festivals close the chapter on a cautionary note. The mid-sized festival is in crisis, hundreds closed since 2019, dozens cancelled each year, squeezed by soaring production costs and a generation that increasingly saves for a few big, high-value experiences rather than many small ones. That concentration, spend flowing to the stadium show and the superclub and the one unmissable weekend while the middle collapses, is the barbell again, this time applied to the experience economy, and it tells any events or drinks brand where the money is pooling. Pulled together, food and drink are where this generation's whole psychology becomes legible in a single order at the counter: the thrifty base and the protected treat, the health claim and the little indulgence, the drink chosen as much for the photo and the ritual as the buzz, the night rebuilt around an activity and a safe way home. The brand that wins here is not the one shouting loudest about its product. It is the one that hands young people a ritual worth repeating, a treat worth affording and a room worth being in, sober or not. The next chapter follows the same instinct for status and self-expression out of the café and onto the body, into style and the wider world of how they shop.

Coupon discipline on the weekly shop, cheerful indulgence on the daily treat.

STYLE & COMMERCE



06

What they wear, how they shop, and what it all signals

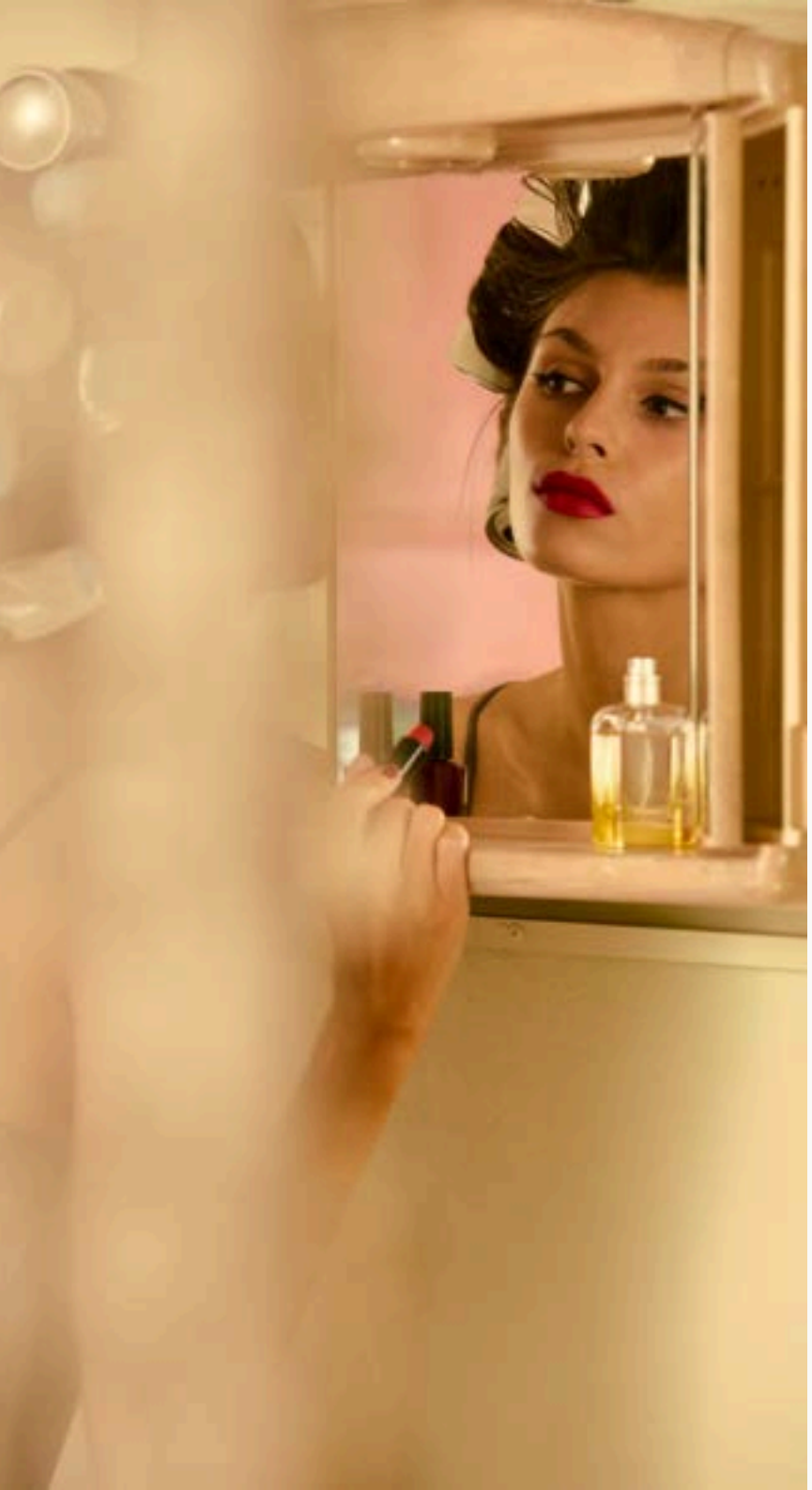
CHAPTER SIX

Nobody in this generation has stopped consuming. They have rewired how they do it, and the wardrobe is where the whole psychology of the report becomes visible in a single outfit: a Shein top bought for a fiver, a £5 supermarket fragrance that dupes a £160 one, a pair of trainers chosen with genuine care, and one real thing, a bag, a jacket, a scent, that carries the self. The barbell from the money chapter, cheap floor and one protected splurge, is not a metaphor here. It is literally what they are wearing.

The single biggest structural change in how young Britain shops is that second-hand became the default first stop. Vinted reached 17 million UK customers in 2025, behind only Primark and Next by reach, having overtaken Sports Direct as its numbers grew by a fifth, and the UK second-hand fashion market is now worth over £7bn with close to one in four fashion transactions involving resale. Among 16 to 24s, one in four uses resale platforms to save money, against fewer than one in ten of the over-55s. The important thing for brands is to read the motive honestly: this is economics first and sustainability second. Vinted's own boss frames the platform as a downturn tool, and the cost-of-living squeeze, the resale value and the thrill of the hunt drive the behaviour far more than the planet does, with the green story functioning as the feel-good justification laid on top. The commercial consequence is sharp and underappreciated: resale value is now part of a garment's real price. A young buyer increasingly works out what a thing costs by subtracting what they can sell it for later, which quietly makes a well-made, resellable item cheaper than a disposable one, and the brands building buy-back or branded resale into their model, as Represent has, are pricing themselves into that maths rather than out of it.

Fast fashion did not die, though; it is enormous and under strain at once, and it exposes the sharpest tension in this generation. Shein still grew to nearly $42bn globally, and it and Temu remain a core part of how young Britain actually dresses, even as the same cohort tells every survey that sustainability matters to them. That say-do gap is not hypocrisy; it is income.





When 53% of Shein's young buyers say it is simply all they can afford, the values are real and the wallet decides, and this is the master lesson of the whole commerce chapter: stated green values are genuine but rarely deciding, and what actually changes behaviour is when the sustainable option is also the cheaper or easier one, which is exactly why Vinted and refurbished win and why virtue sold at a premium fails. Underneath the fast-fashion churn there is even a counter-current worth naming, the underconsumption and no-buy discourse that flowered on TikTok, but it lives far more loudly as content than as measured behaviour, and a brand should treat it as a mood rather than a movement for now.

Taste itself has fragmented into a blur of fast-cycling aesthetics, and the honest news for brands is that chasing them is a losing game. The last two years ran through mob wife, office siren, brat summer, the boho revival, blokecore, coquette and a dozen other named "-cores", each viral and then dated within a season, and by 2026 the fashion press was openly naming the exhaustion, "micro-core fatigue", and a swing back toward individual style and pieces that last. The lesson is not to ignore trends but to stop building strategy on them, because by the time a brand has manufactured, shipped and marketed to a named aesthetic, the aesthetic is already cringe. The durable signal underneath the churn is a hunger for individuality and for staples that outlive the cycle, which rewards brand-building over trend-chasing.

Where the real cultural heat lives is UK streetwear, and it is the clearest proof in this report that community and scarcity beat advertising.

1 IN 5 UK 18–25S HAVE ALREADY HAD BOTOX OR FILLER, ROUTINE RATHER THAN REMARKABLE.



1 in 5

UK 18–25s have already had Botox or filler, routine rather than remarkable.

Corteiz is the case study every marketer should know: a West London brand built by Clint Ogbenna on a private Instagram, a shop that opens only in bursts, and guerrilla drops that became folklore, the puffer exchange where fans swapped premium jackets for a Corteiz "Bolo", the 99p cargo sale that drew thousands to a market stall, all of it turning scarcity and mischief into roughly $58m of revenue and a Nike collaboration that sold out in seconds. Around it sits a genuine scene, Trapstar, Represent at £93m turnover with a fast-growing activewear line, Broken Planet, and the through-line is identical: no billboards, no reach-buys, just drops, community, co-signs from the biggest names in UK rap, and the deliberate manufacture of not being able to get the thing. The trainers tell the same story from the other direction. Nike, the default of a decade, went flat and cooling while adidas surged past £24bn on the Samba and Gazelle, spread almost entirely by organic styling and celebrity feet rather than campaigns, and even that is now rotating on, with the market fragmenting toward running and technical brands, ASICS up dramatically, Salomon and On climbing, Onitsuka Tiger reframed as Gen Z's shoe of the moment. The pattern for any brand watching is that hype is now a fast-moving current, not a fixed hierarchy, and it is earned in culture, not bought in media.

Two UK rankings of youth brands were published within months of each other this year, and they contradict each other, which is the most useful thing about them. Pion asked 2,131 UK 16 to 24-year-olds how they felt about more than 700 brands. Greggs came first. Basis analysed over 50 million Gen Z signals across social, search and forums, and found Dr. Martens first in the UK, with Greggs barely visible. The tempting move is to pick the one that suits the argument. The honest reading is that they measure different things and both are true. Pion measures affection, which is what people will tell you when asked. Basis measures conversation, which is what people do without being asked. Those have come apart. Dr.



Martens is the only UK brand in the Basis data that appears across all six of the ways young people talk about brands: whether it is credible, whether it is urgent, whether it is worth keeping, whether it can be made your own, whether it gets recommended, and whether it is worth showing up for. Only three UK brands out of sixty-eight manage that. Most win in one or two contexts. Palace is the sharp example of the opposite: thirteenth overall, present in only one conversation type, and dominant inside it, because when British youth talk about a drop, Palace is the drop. Lush leads on credibility, rising whenever the conversation turns to ingredients and whether something is genuinely worth it. ASOS leads on recommendation, because it is embedded in daily life and daily life produces the “which one should I get” message. Monzo, in a category that struggles to be talked about at all, shows up in four. For a brand, the diagnostic is more useful than the league table. Being loved and never mentioned is a different problem from being mentioned and never loved, and they have opposite solutions.

The gap between what they want and what they can afford has produced a specific commercial role, and Sports Direct occupies it. It takes the brands young people covet, Nike, adidas, The North Face, and prices them into reach. Pion's respondents scored it 89% on affordable fashion accessibility and 84% on making premium affordable, and it ranked tenth nationally overall. What makes it work is that it does not pretend. It is honest about being a discount destination, and that honesty reads as respect rather than compromise.

THE SIX CONVERSATIONS

01

Is it credible

Does it hold up when people check the ingredients

LEADS IT · LUSH

02

Is it urgent

Is there a reason to move now, not later

LEADS IT · PALACE

03

Is it worth keeping

Does it survive a wardrobe clear-out

LEADS IT · DR. MARTENS

04

Can I make it mine

Is there room in it for my own version

LEADS IT · DR. MARTENS

05

Would I recommend it

Does it answer the which-one-should-I-get message

LEADS IT · ASOS

06

Is it worth showing up for

Would I queue, travel or clear an evening

LEADS IT · DR. MARTENS

Six ways young people talk about brands. Only three UK brands out of sixty-eight appear in all six. Most win in one or two, which is not a failure so long as you know which ones you have.

FIG. 05

The strategic point generalises past retail: young people are not embarrassed by the brand that helps them afford things. They are embarrassed by the brand that pretends they can afford more than they can.

Shein and Primark both dominated young people's field of vision in 2025, and came out of it with opposite results. Shein flooded feeds through influencers and discount codes, and produced a love score well below its visibility. Primark built its position through physical space, stores functioning as places to meet friends and spend an afternoon, and converted that into genuine affection. Same category, same audience, same year. Attention is cheap and affection is rare, and one does not convert into the other on its own. Pion's own framing of this is worth keeping: young people are not rejecting brands. 87% report positive feelings towards brands, with 36% saying they love them. What they are rejecting is paying full price. The distinction matters, because a brand reading low conversion as low affection will fix the wrong problem.

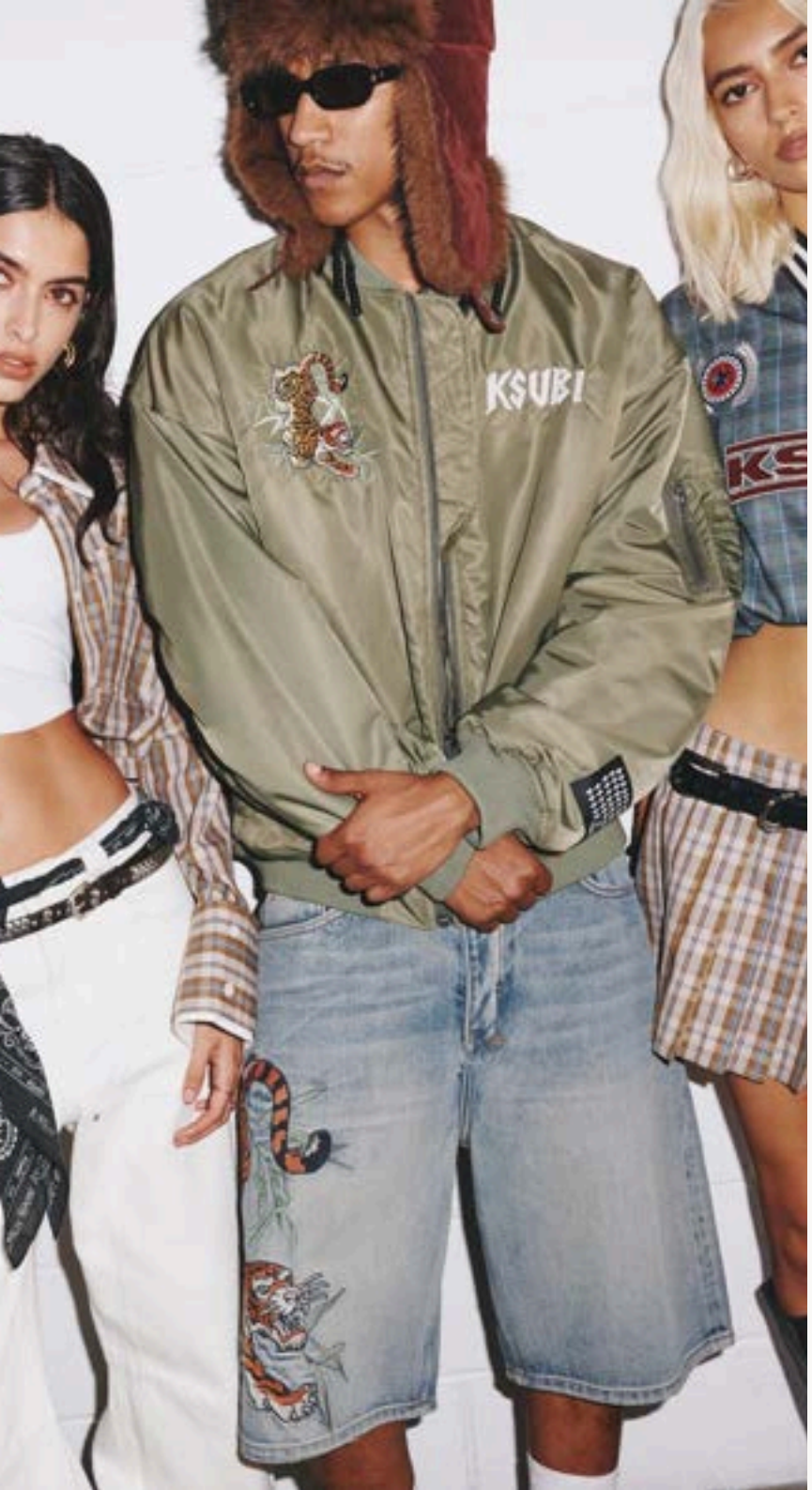
Beauty is booming, it is increasingly male, and fragrance is leading the charge. The category is one of the most resilient in retail, and the newest movement in it is young men, with facial skincare use among Gen Z men roughly doubling in two years and UK male grooming sales surging as young men research ingredients like a hobby. Fragrance is the fastest-growing strand of all, "smellmaxxing" turning scent into an identity project and a fragrance wardrobe into a status collection, much of it driven by TikTok and much of it, tellingly, dupe-led: the supermarket and Zara dupe of a luxury scent is now openly celebrated rather than hidden, part of a wider destigmatised dupe culture that runs from Aldi's £5.99 take on a £160 perfume to lookalike makeup, with the only real pushback coming from brands winning the occasional lookalike lawsuit. The names to know for this cohort, Rhode, Sol de Janeiro, The Ordinary, Refy, Made by Mitchell, and the K-beauty wave surging through TikTok Shop, matter less than the mechanism: beauty is now discovered, explained and sold in a single vertical-video scroll.



One UK-specific figure is worth carrying. Barclays research finds British men now outspending women on treatments such as Botox and fillers. Whatever else is happening in beauty, the assumption that it is a female category no longer survives the UK spending data, and the male end of it is being framed not as vanity but as discipline, performance and control.

Underneath the commercial beauty boom sits a psychological one the industry is quicker to profit from than to reckon with. Filters have moved the goalposts of comparison inward: the large majority of young women now edit a photo before it goes anywhere, and the reference point has shifted from a model in a magazine to an idealised, filtered version of themselves, summoned instantly and impossible to live up to. The finding that should worry any brand playing in this space is the gap between what they know and what they feel: young people can explain exactly how a filter works, the jaw reshaped and the skin smoothed by an algorithm, and still feel worse about their own unedited face after seeing it, because knowing something is fake does not switch off the feeling it produces. Cosmetic intervention has moved into that gap and normalised fast, close to one in five UK 18 to 25s have already had Botox or filler, treated by many the way a hair appointment used to be treated, routine rather than remarkable, and "prejuvenation", starting small and starting early, is now a named strategy rather than a punchline. For young men the same pressure runs through a newer, harder-edged vocabulary, "looksmaxxing", the project of engineering a more attractive face and body through everything from jaw exercises to surgery, rated against pseudo-scientific metrics like eye angle and bone structure. It is the same insecurity this report finds feeding the manosphere elsewhere, dressed as self-improvement, and the concern underneath it, a distorted sense of your own face that starts to resemble the disorders it borrows its intensity from, is real even where hard UK numbers on it are still missing. The instruction for any beauty, fitness or grooming brand is blunt: an unlabelled "aspirational" image and a labelled one cause much the same harm, because the emotional brain does not read small print, and the honest move is not the disclaimer.





It is the picture itself.

Which points at the deepest change in how they buy anything: the discovery-to-purchase journey has collapsed into the feed. TikTok Shop became the UK's fourth-largest beauty retailer on 60% category growth in a year, with live shopping sessions multiplying and Black Friday sales up by half, and for a meaningful share of young adults it is now the main source of what to buy in fashion and beauty. See it, want it, buy it, all without leaving the app, and the haul and the "is it worth it" review live in the same place. But the same generation is also, contrary to the pure-online story, reviving physical retail, most likely of any age group to discover a brand in a shop, driving a charity-shop and vintage-market resurgence that outperforms the wider high street, and treating the flagship and the pop-up as content-generation engines. Digital-first does not mean digital-only, and the brands winning treat the shop as theatre and the feed as till.

All of this reshaped what a brand can even be, and DTC is the clearest casualty. The direct-to-consumer dream of the last decade has met rising acquisition costs and a hard ceiling, and the youth-relevant DTC brands have responded by moving into wholesale and physical retail, Gymshark onto shop floors, Wild deodorant from a website into Sainsbury's and then a Unilever acquisition, Represent into flagships. The pattern is that DTC is now a launchpad and a community-builder, not a permanent home, and scale requires being everywhere the customer already is.

The last strand of this chapter is the one the report has been promising to reach: luxury, class, and the young people with real money.

Luxury is in a genuine slowdown, the personal luxury market shrinking and shedding tens of millions of buyers as prices rose far faster than newness, and young people are its most decisive swing vote precisely because they are projected to make up around three-quarters of luxury spending by the end of the decade. Their response to the price-out is instructive: a pivot to pre-owned luxury through Vestiaire and its rivals, and to experiences over goods, with the brands winning them, a Miu Miu, doing it through freshness rather than heritage. But the more useful finding for a brand sits in how class itself is now read through style. The dominant aspirational aesthetic is "old money", "quiet luxury", the "clean girl", logo-free and understated, and the dominant counter-code is logo-heavy streetwear with deep subcultural credibility, and young people read the two with total fluency. The high-income young, the genuine minority with liquidity or family money behind them, increasingly signal it by hiding it, stealth wealth and lineage over logos, while everyone else recreates the same codes affordably through Zara, Uniqlo and thrift and pre-owned. There is a real caution here that a good agency earns its fee by flagging: the quiet-luxury and old-money aesthetic is coded, by class and often by race, in ways that can curdle fast, and the cautionary tale of the cycle is PrettyLittleThing, whose pivot from hot-pink bodycon to beige "old money" cosplay, with prices raised and its core plus-size ranges thinned, read to its own audience as a betrayal of who it was for. Misreading your customer's class identity, the PLT lesson runs, is commercially dangerous, because in this generation taste is class legible at a glance and felt in the gut.

At the leading edge, the monopoly fashion held on status appears to be breaking. Among Highsnobiety's global audience of early adopters, the biggest spending rises of the last year were in groceries, travel and wellness, while fashion was more likely to fall than any other category. Asked what reads as more culturally knowing, 86% chose being friends with the chef at the hottest restaurant over turning up to dinner in the latest luxury item, which 14% chose. This is a self-selected global minority and it should be read as an early signal.

A cheap floor, and one real thing that carries the self.

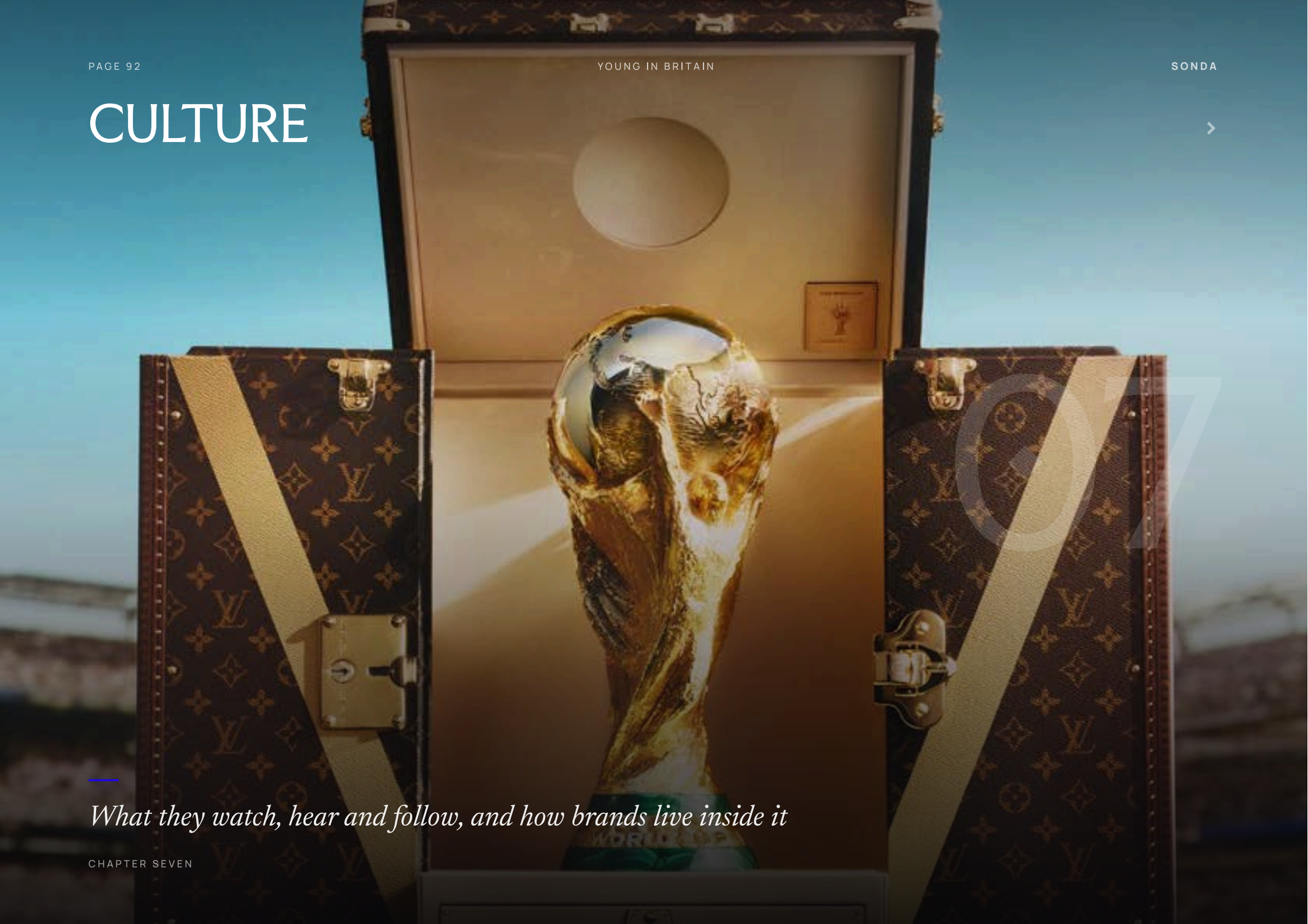




But the mechanism it describes is one the UK evidence supports independently: status has not been abolished or democratised, it has scattered. It now gets demonstrated across many categories at once, each with its own codes, and knowing the codes matters more than affording the object.

Pulled together, style and commerce show a generation extracting the meaning of consumption, the look, the scent, the status object, while refusing its full price and its waste, shopping a cheap floor and a protected splurge, discovering in the feed and confirming in the shop, loyal to scarcity and community and unmoved by advertising, and reading class through every purchase. The brand that wins here is not the one with the biggest campaign. It is the one that earns cultural credibility, prices itself into their resale maths, respects both ends of the barbell, and never, ever misreads who its customer thinks they are. The next chapter follows the same signals up out of the wardrobe and into the wider world they are built from: culture itself, what they watch and hear and follow, and how brands live inside it.

CULTURE



What they watch, hear and follow, and how brands live inside it

CHAPTER SEVEN

Culture is where this generation actually lives, and it is the hardest thing for a brand to buy its way into. Everything in the report so far, the beliefs, the money, the screens, the wardrobe, converges here, in what young Britain chooses to watch and listen to and gather around, because culture is how they build identity out of the raw material of a fragmented world. And the first thing to understand is that there is no longer a single culture to buy into. There is a centre of gravity, and around it a thousand niches moving at speed, and the brands that succeed learn to move with specific scenes rather than broadcasting at a mass that no longer assembles.

The centre of gravity is Black British and diaspora music, and cultural literacy now starts there. UK rap and drill, afrobeats, amapiano and the jungle and drum-and-bass lineage are the engines of what reads as cool, and they are not a niche to be sampled but the mainstream itself. The scene in 2025 was richer and stranger than the caricature allows, Central Cee a genuine global star with his own streetwear label, Jim Legxacy making a critically adored record literally titled after Black British music, a jungle and DnB revival carried by a young wave of artists filling the most rammed tents at every festival. Afrobeats and amapiano crossed fully into the mainstream, amapiano alone clocking well over a billion Spotify streams with the majority played outside Africa, and the Official Charts now runs a dedicated UK Afrobeats chart. For a brand this is the single most important literacy test in the whole report: fluency in Black British and diaspora culture is not a nice-to-have, it is the price of being taken seriously, and the brands that fake it are read instantly.

Music itself became a market of extremes, and the young sit at both ends. The recorded market passed £1.5bn for the first time, streaming dominant at nearly nine-tenths of consumption, and yet the young are simultaneously the drivers of the most physical, most devotional formats on the market. Vinyl grew for an eighteenth straight year, most of the best-sellers current releases rather than nostalgia, bought by young people who treat a record as an identity object and an act of support for an artist they love.



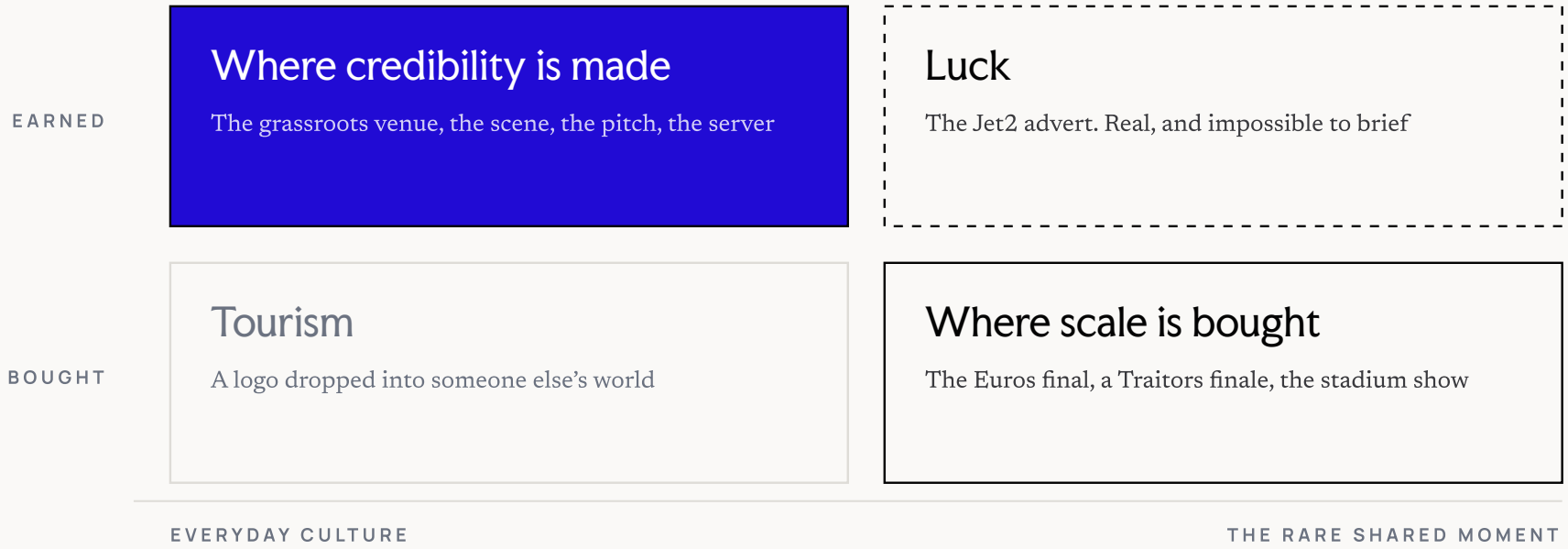


This is the superfan economy, the same instinct that fills K-pop photocard sales and drives the devoted to spend many times the average on the acts they belong to, and it points at a truth every brand should hold: this generation gives passive attention to almost everything and deep devotion to a precious few, and the money and the loyalty live in the devotion.

But the live side of that love is in a fairness crisis, and how brands behave around it is watched closely. The Oasis reunion was the cultural event of the year, well over a million tickets, and it became the year's cautionary tale when dynamic pricing pushed advertised tickets to more than double at checkout, triggering a competition-regulator investigation and a national argument in which the overwhelming majority said dynamic pricing should simply be banned for gigs. Underneath the stadium spectacle, the grassroots that produces every future headliner is collapsing, thirty venues closing in a single year, more than half of the survivors making no profit, whole towns dropping off the touring map. The instruction for brands could not be clearer: the credibility on offer is not in sponsoring the arena show but in funding the room where the next Oasis is learning to play, and the audience can tell the difference between the two.

Football is culture as much as sport, and its story this year was about who gets to belong.

EARNING CULTURAL RELEVANCE



Earn your place in the everyday culture and buy your place in the rare shared moments, never the other way round. The top-left quadrant is the only one that cannot be bought, which is exactly why it is the only one that confers anything. Entry requirement for all four: fluency in Black British and diaspora culture. Working test: would it still work with subtitles?

FIG. 03

3 in 4

New Formula One fans are women. The clearest proof a culture-first strategy rewires who shows up.

The Lionesses retaining the Euros was the most-watched British television moment of the year, and women's football is now a genuine cultural and commercial force with a young, engaged audience and unusually high sponsorship awareness among under-35s, an open door for brands that most have been slow to walk through. But the men's game is pricing its young fans out, top-club season tickets climbing past a thousand pounds while the German model keeps prices a fraction of that, breeding real alienation and a quiet resurgence of non-league football as the affordable, authentic alternative. And a shadow hangs over the culture that a responsible brand cannot ignore: gambling has saturated football to the point where problem-gambling rates among young male grassroots players run many times the national average, betting knowledge traded as a kind of social currency, which makes gambling adjacency a genuine duty-of-care line rather than a mere brand-safety footnote.

Around football, the sporting culture of the young is being redrawn, and Formula One is the case study. F1 remade itself for a Gen Z and increasingly female audience, three in four of its new fans women, on the back of a Netflix docuseries, streaming access and a Hollywood film, becoming a lifestyle and fashion property as much as a motorsport, the clearest proof in the report that a culture-as-entry-point strategy can genuinely rewire who shows up. Running completed the same shift from activity to identity, the London Marathon seeing its under-thirty entries more than double and the run club becoming a social and even romantic institution, as the friendship chapter found. The pattern for brands is that the sports winning the young are the ones that became cultures, with aesthetics and community and a way in, rather than staying mere competitions to be watched.

Gaming is the dominant medium of this generation, and the "gaming is for boys" assumption is simply wrong. Close to half of UK gamers are women, and gaming is less a hobby than a place, the third place from the friendship chapter made digital, where young people hang out in Fortnite and Roblox with Discord open alongside, where the effort-and-reward loop of ranks and progression satisfies the same craving for earned advancement that runs through the whole report.

The commercial power is enormous and so is the controversy: loot boxes, Ultimate Team packs and battle passes draw regulatory scrutiny for their proximity to gambling, and the year's most anticipated cultural release of any kind, GTA VI, slipping into late 2026, is a genuine economic event. For brands the rule inside these worlds is the one the media chapter set: native gameplay that adds something worth playing earns a place, and the billboard dropped into someone else's game is ignored or mocked.

On screens, the monoculture is gone and its absence is the story. Fewer than half of 16 to 24s now watch any broadcast television in a week, YouTube has become their actual television, and appointment viewing survives only as rare national spikes, a Traitors final, an Adolescence, the Euros. The most important screen shift for a brand to grasp is the globalisation of taste: anime went fully mainstream, the latest Demon Slayer film breaking the UK anime box-office record, subtitles now completely normal to a generation that does not experience foreign-language content as foreign, Korean drama and film sitting in the everyday rotation alongside British and American. This is the "would it work with subtitles" test made real, and it cuts both ways, because the same young Britons reviving cinema as a phone-free social ritual and turning out for a Minecraft film are also the ones for whom a Nigerian afrobeats track and a Japanese animation and a Korean thriller are simply part of the mix, no translation required.

Internet culture is the connective tissue, and it moves faster than any brand's production schedule. Brain rot was named word of the year, the young both generating and mocking the endless churn of memes and micro-phenomena, Italian brain-rot AI characters and playground catchphrases entering the language and dying within weeks. The lesson from the media chapter applies with force here: memes are a language with a shelf life measured in days, and a brand attempting to speak it arrives late almost by definition, so the move is fluency and speed or silence, never the belated corporate meme that signals a committee three months behind.



30 GRASSROOTS MUSIC VENUES CLOSED IN A SINGLE YEAR. HALF THE SURVIVORS MAKE NO PROFIT, THE PHYSICAL ROOMS WHERE CULTURE IS ACTUALLY MADE ARE DISAPPEARING FASTER THAN ANY PLATFORM CAN REPLACE THEM.

And the underground endures, which is where a brand can still earn something real. Against the backdrop of club closures from the food and drink chapter, the actual scenes are thriving, drum and bass and jungle surging with the young, a day-rave and soft-clubbing trend rising fast, the Boiler Room livestream aesthetic turning millions of vicarious viewers into real-world ravers. Subcultures did not die so much as fragment, the committed movements of the past replaced by fast-cycling aesthetics, the endless "-cores", identity assembled from micro-trends and nostalgia and algorithmic discovery, one person now enough to be a subculture. Which is exactly why the brand that funds a Boiler Room series and cedes real editorial control to the scene, or backs a grassroots venue, or shows up in a specific culture with money and access rather than logos, earns a credibility that no mass campaign can manufacture. Culture cannot be bought wholesale any more, because it no longer gathers in one place to be bought. It can only be joined, one scene at a time, by a brand fluent enough to belong there and generous enough to leave the culture better than it found it. The next chapter turns to the people who sit at the centre of these scenes and shape what everyone else pays attention to: the influencers, role models and icons through whom this generation is actually moved.

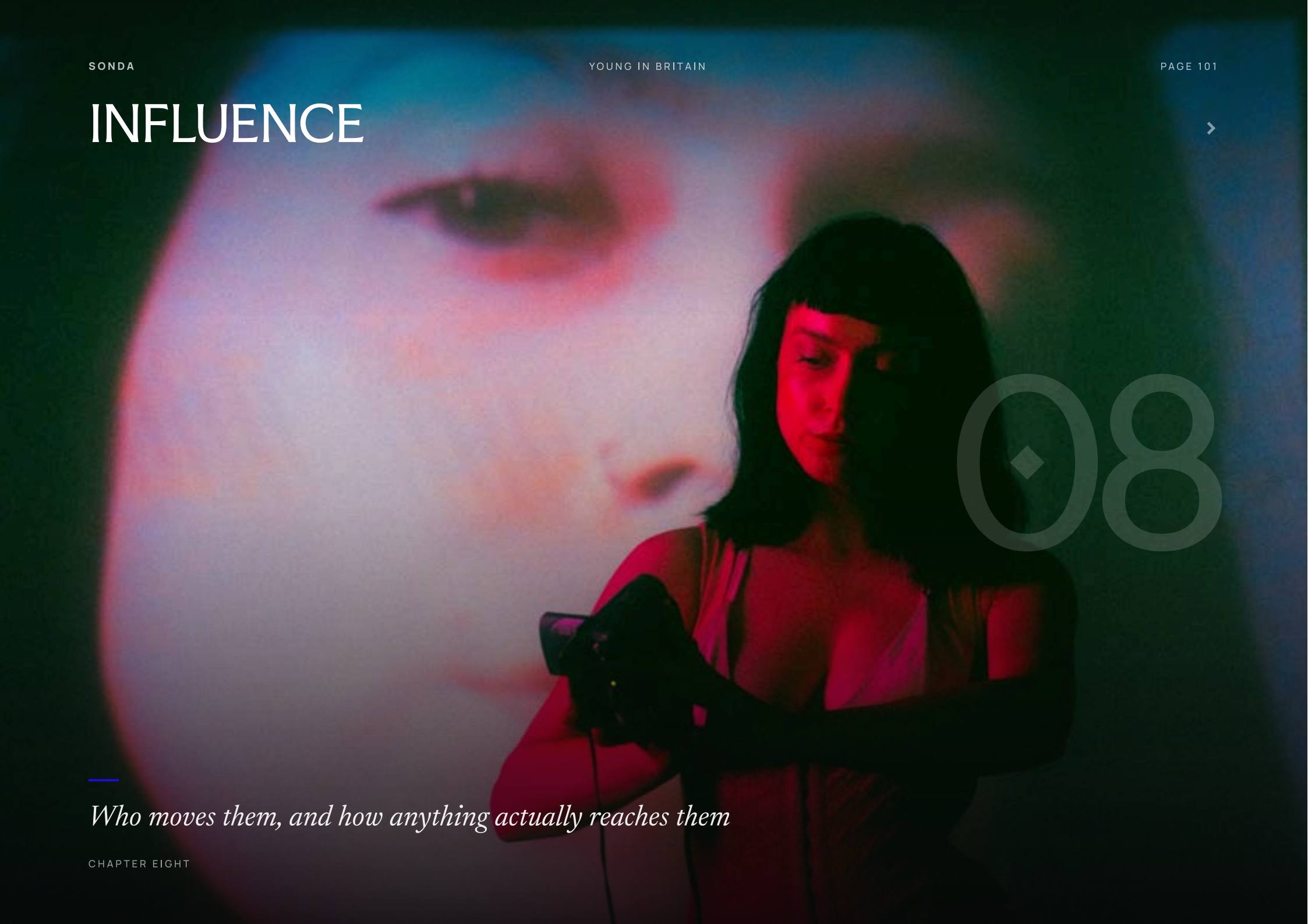
Arsenal offer a small, precise example of a brand entering fandom correctly. In February 2026 the club launched an official Reddit channel, and rather than building a new space it went to r/Gunners, a supporter community running since 2008, and ran an Ask Me Anything with William Saliba inside it. The club showed up as a guest in a room the fans had already built rather than asking them to move into a room it had built.





That is the whole distinction. Where a real community already exists, joining it works. Manufacturing one from scratch reads as superficial, and the audience says so out loud.

INFLUENCE



Who moves them, and how anything actually reaches them

CHAPTER EIGHT



If nobody is trusted, how does anything sell? This is the question the whole report has been building toward, and the answer is the most commercially useful thing in it. The messengers this generation listens to most are the least trusted profession in Britain, and yet the market they move is enormous and growing. Resolving that paradox is the difference between a brand that wastes its money on reach and one that earns its way into the places where young people are actually persuaded.

Start with the paradox stated at full strength, because it is genuinely strange. When Ipsos added social media influencers to its Veracity Index for the first time in late 2025, they debuted dead last, trusted by just 6% of Britons, the lowest score for any profession in the survey's forty-two-year history, below politicians, below ministers, below advertising executives. Nearly nine in ten people say plainly that they do not trust influencers to tell the truth. And yet a quarter of 16 to 34s get their news from influencers every single day, most young followers say they have changed their behaviour on an influencer's word, and the majority of young people have bought a product after seeing a creator use it. The two facts sit side by side and do not cancel out, because they are measuring different things. Trust is an abstract judgement; influence is what happens in the moment of the scroll. Young people do not need to believe an influencer is honest in general to be moved by a specific recommendation from someone whose face they see every day. Attention, familiarity and the feeling of knowing someone do the persuading that trust used to do.

The resolution, then, is that this generation extends trust to mechanisms rather than to messengers. They do not trust the person; they trust the process. Peer consensus in the group chat. Repeated exposure across different contexts until a thing feels real. Visible proof that a product works. The disinterested review buried in a Reddit thread. The influencer is a distribution mechanism, not a trust mechanism, and the trust mechanism sits one layer down, in the friends and the reviews and the communities that ratify what the influencer surfaced.

Nothing converts on first exposure, because conversion is a function of repetition and corroboration, of a thing being seen enough times in enough trusted places that it crosses from noise into consideration. Proof by ubiquity, checked against peers, is how anything moves this cohort, and the brand that understands this stops buying single big moments and starts building presence across the layers.

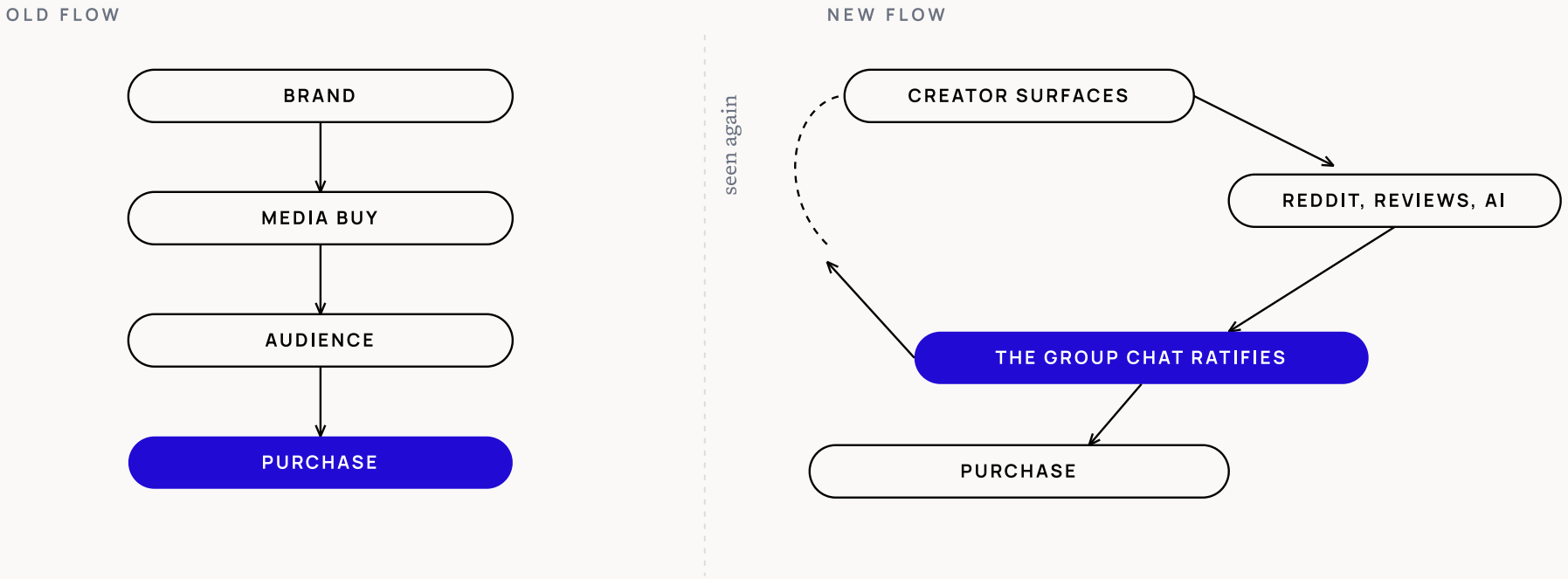
Which is why the shape of influence itself has shifted, away from the celebrity billboard and toward the credible niche. The mega-influencer, the polished account holding up a product, converts worse now than the micro and nano creator whose recommendation feels like a friend's, and the industry has moved with the evidence, most successful brands now favouring long-term creator partnerships over one-off placements and paying increasingly on performance rather than reach. The "de-influencing" genre, creators telling their audiences what not to buy, passed a billion views precisely because it reads as honesty in a sea of promotion, and it structurally rewards the smaller, more trusted voice. Underneath it sits the rise of the expert and the long-form: the finance creator, the fitness coach, the beauty specialist who actually knows the ingredients, and the podcast and the long YouTube video winning attention that the glossy fifteen-second post no longer commands. The move a brand should read from all of this is from influencer-as-billboard to creator-as-collaborator, from renting a face to building a genuine, repeated relationship with someone whose audience believes them.

Beneath every layer of paid influence sits the one that actually decides, and brands rarely reach it directly: the group chat. Friends and family remain the most trusted source of all, comfortably above any influencer, even among the people who follow influencers most heavily, and the real conversation about a brand happens in the private rooms this report keeps returning to, ratified by a screenshot and a line of commentary. There is one important wrinkle for the very youngest, though. For Gen Z specifically, the line between a followed creator and an actual friend has blurred to the point where an influencer's recommendation can rank alongside a friend's, the "para-friendship" effect, a creator watched daily processed by the brain as someone you know.

−70%

PRIME's UK sales collapse in a year. Bottles discounted to 31p.

THE FLOW OF INFLUENCE



The old flow ran one way and ended at purchase. The new one surfaces in a creator's feed, gets checked somewhere disinterested, and is only ratified in a private chat no dashboard can see, and then it goes round again.

FIG. 07

The instruction for brands is the same either way: the goal is to be recommended into the trusted micro-network, to become the thing a friend or a friend-like creator forwards, rather than merely the thing an ad interrupts.

The Sonos example is the most instructive brand presence on Reddit, and almost nothing about it looks like marketing. A Sonos employee posting as u/KeithFromSonos has been part of the r/Sonos community for over two years, answering fiddly product questions and sharing his film recommendations. His most upvoted post came after the company laid off a hundred people. He is not a campaign. He is a person who works there and turns up. His own advice to brands is the clearest statement of the rule in this report. Treat the subreddit as a bar or a cafe. You are a guest in a space somebody else built. Be friendly, do not go from table to table shaking hands, and understand that the regulars come first. Not every interaction needs to fix a problem or sell a thing. Set that against Oatly, who entered the same environment on their own terms, hosting an Ask Me Anything led by their sustainability director to debunk myths about sustainable food. The room took the opportunity and set its own agenda instead, asking about the company's investment, its packaging and its climate footprint. Nothing went wrong exactly. The brand simply discovered that it had arranged the meeting but did not control it. The line between those two outcomes is not tone or budget. It is whether the brand arrived with a message to deliver or a willingness to be asked things.

The people doing the influencing have, meanwhile, become an industry in their own right. The UK's biggest youth creators are no longer talent to be booked; they are founders and moguls building businesses.



The Sidemen launched a venture capital fund in 2025 on top of their restaurants, their vodka, their cereal and their clothing; KSI parlayed the same audience into a drinks brand and a primetime judging seat; GK Barry went from TikTok to a hit podcast to mainstream television. This professionalisation matters to brands in two ways. It means the best creators think like business partners and want long-term equity in a relationship, not a flat fee. And it concentrates enormous reach in a small pool of macro-creators, which is efficiency and risk in the same object, because when one of them falls, and the report notes the live case of a major UK creator facing serious criminal charges, every brand attached to him has to strip back its content overnight. Diversifying talent and writing genuine morality clauses is no longer caution; it is basic hygiene.

The role-model question is where influence turns from a marketing topic into a social one, and brands cannot fully sidestep it. Most young people, asked who they look up to, still name parents and peers first, which is worth holding onto against the moral panic. But there is a genuine vacuum for young men, and something has moved into it: around a fifth of young men who have heard of Andrew Tate view him favourably, three times the rate among young women or older men, even as a clear majority reject him. The exposure is near-universal and the endorsement a minority, exactly the pattern the belief chapter found, and the demand signal underneath it is not for misogyny but for status, purpose, belonging and direction, in a cohort where mentorship and real-world community have thinned. The response from the culture has been to try to fill the gap with better voices, Gareth Southgate using a national lecture and a BBC documentary to name the "toxic influencers" preying on young men, athletes and coaches and credible experts stepping forward. For brands the instruction is precise and a little counterintuitive: do not moralise, and do not risk adjacency to manosphere content, but do speak to the real needs underneath it, mastery and progress and belonging, through voices young men actually find credible. A masculinity-adjacent campaign that could not survive being screenshotted next to a Southgate quote should not run.



Cultural icons, meanwhile, have fragmented in exactly the way the culture chapter predicted. The monolithic celebrity who moved everyone is giving way to a field of mid-sized, scene-specific figures, the hyper-online rapper, the darts prodigy who became a genuine Gen Z hero at seventeen, the F1 driver, the footballer, each commanding a niche rather than the nation. Influence is distributed now, and a brand that wants a face should map scenes rather than chase the single biggest name, because credibility inside a specific world beats fame across all of them.

Celebrity endorsement in the old sense barely works, but the celebrity founder-brand works enormously when it is real. The proof is in the contrast between two drinks and two beauty brands. Hailey Bieber's Rhode, built on genuine founder involvement and real product credibility, sold to e.l.f. for up to a billion dollars on the back of record sales and a rapturous Sephora launch. PRIME, the KSI and Logan Paul energy drink that was 2023's playground currency, collapsed by more than 70% in UK turnover once the novelty passed, prompting the verdict that you cannot cheat the fundamentals. The active ingredient in the successes is the parasocial relationship, the sense of actually knowing the founder, and that is also the concentration risk, because the brand rises and falls with the person. Fame alone sells nothing to this cohort; a credible founder genuinely involved in a good product sells a great deal.



And all of this now converts directly, because the distance between influence and purchase has collapsed to nothing. TikTok Shop became one of the UK's largest beauty retailers in a single year, live shopping and creator-driven sales turning a recommendation into a checkout in the same breath, with a meaningful share of young adults naming the platform as their main source of what to buy. The creator-to-commerce funnel is now a single motion, which makes two things essential for brands: the affiliate and shoppable plumbing has to be flawless, because a broken path wastes the influence at the exact moment it lands, and the regulation has to be respected, because the authorities have caught up. The competition regulator polices the collaborations, the advertising regulator polices the disclosure, and the financial regulator has escalated hard against finfluencers, enforcement up sharply and now including arrests and custodial sentences, because so many young people were following and trusting and acting on financial advice from unqualified voices.

Pion's data gives this a number. Asked to place brands on a scale from love to hate, young people put only 13% in the indifferent column, and the researchers were clear that this is the outcome to fear. In a market with unlimited choice, being disliked means being registered. Being ignored means being outside the set of things worth having an opinion about, and there is no campaign that reaches someone who has already filed you under not-for-me.

Pulled together, influence in 2025 is a machine with a clear logic once you stop being surprised by the paradox at its centre. Trust and attention have decoupled, so this generation trusts processes rather than people, extending provisional belief to the group chat, the repeated exposure, the visible proof and the disinterested review, while consuming daily from messengers they would never call honest.

Treat the subreddit as a bar or a cafe. You are a guest in a space somebody else built, and the regulars come first.

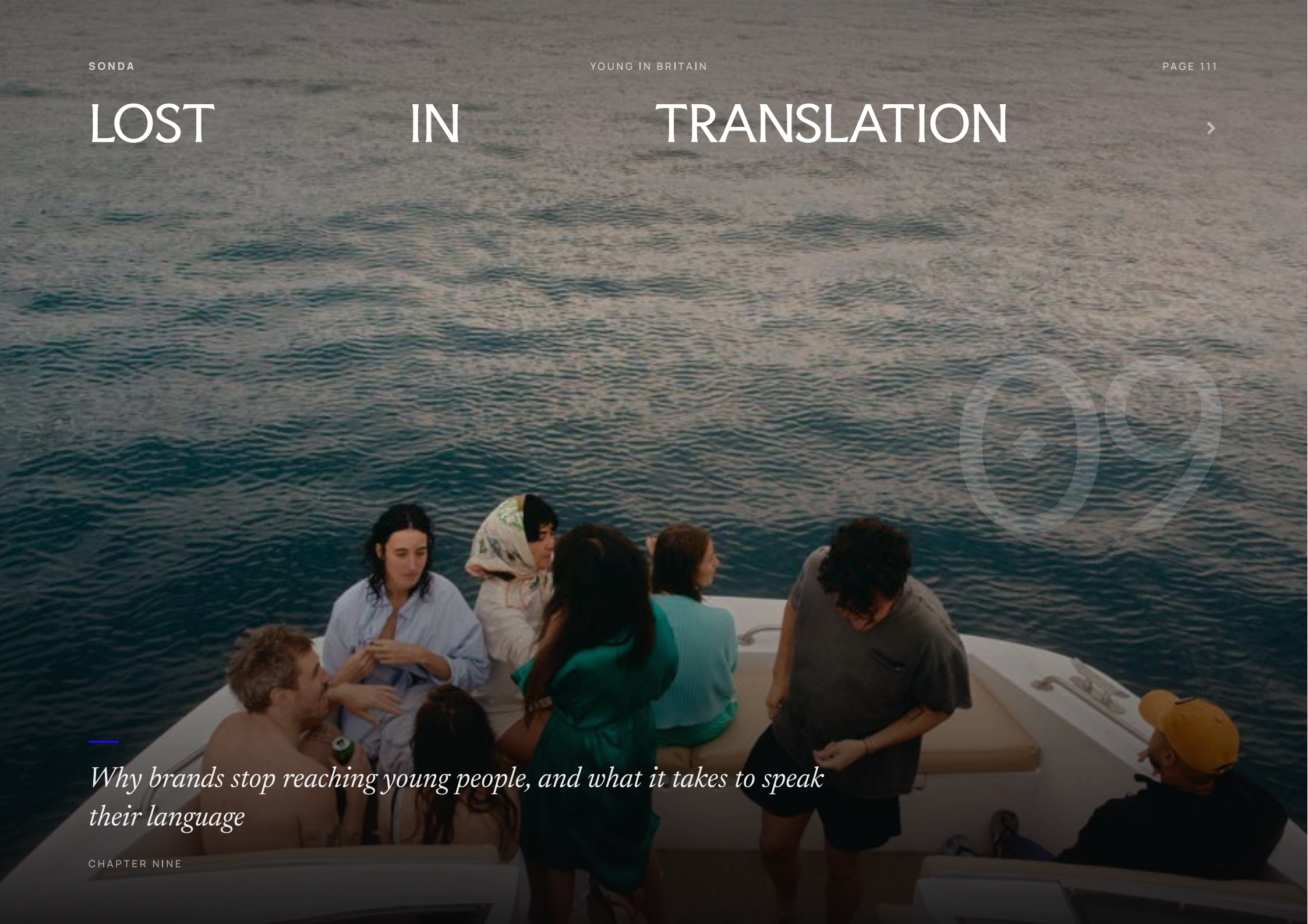
SONOS COMMUNITY EMPLOYEE · VIA LINK IN BIO



The winning brand stops buying reach and starts earning credibility: long-term partnerships over one-off placements, creators as collaborators over influencers as billboards, the underlying needs of young men addressed through voices they respect, founder-led authenticity over borrowed fame, flawless commerce plumbing over a broken funnel, and genuine advocacy seeded into the trusted micro-networks it cannot buy but can earn.

The working test of everything in this chapter is a single question, and it is the same one the culture chapter ended on: is anyone screenshotting this, unprompted, into a chat you will never see? If not, whatever it is, it is not working. The next chapter turns from how they are influenced to where the report keeps finding the cliches that get them wrong, and what it takes to speak to them in a language they actually recognise.

LOST IN TRANSLATION



Why brands stop reaching young people, and what it takes to speak their language

CHAPTER NINE



Every failed attempt to reach this generation has the same root cause, and it is not budget, and it is not creativity, and it is not the media plan. It is language. Brands keep saying true things to young people in a language young people do not speak, and the message lands as noise. And the cruellest part, the part that makes this chapter necessary, is that the brands who get it most wrong are rarely the ones who ignore this audience. They are the ones who are certain they understand it. Assumed understanding, the quiet confidence that a demographic dashboard or a few young voices in the room adds up to genuine fluency, is the single most expensive mistake in youth marketing, and this chapter is about the difference between assuming you speak the language and actually speaking it.

The gap between what brands think young people want and what young people actually want is now measurable, and it is widening. The clearest evidence comes from a 2026 study by the advertising body IAB with Sonata Insights: 82% of advertising executives believed Gen Z and millennial consumers felt positive about AI-generated ads, while only 45% of those consumers actually did, a perception gap that had grown from 32 points two years earlier to 37. Sit with that. The people whose profession is understanding this audience were wrong about it by nearly double, and getting wronger with more exposure, not less. The detail that should chill every marketer is the direction of the error: the cohort the industry assumes is most comfortable with AI, the digital natives, turned out to be the most resistant, with Gen Z negativity toward AI ads running at nearly twice the millennial rate. The confidence was not just misplaced; it was inverted.

This is what assumed understanding looks like in a spreadsheet, and it is the thesis of this chapter in a single statistic.

When that confidence gets acted on at full scale, you get the failures, and 2025 supplied a run of them. PrettyLittleThing is the sharpest UK case. In March 2025 the fast-fashion brand tore up its loud, hot-pink, size-inclusive identity for muted "quiet luxury" minimalism and higher prices, and its young audience revolted, because the rebrand was subtractive: it removed the very things, the playfulness, the inclusivity, the accessible price, that its customers actually valued, in pursuit of an elevated image the brand had not earned. Jaguar did a grander version of the same thing in late 2024, deleting its heritage and its social archive for a car-less film of pink landscapes and slogans that a Bild poll of nearly eighteen thousand people rated 93% "creepy". Coca-Cola's AI-generated Christmas ads drew the same recoil two years running, because AI read as a violation of a warm human ritual the brand itself had spent decades building. Duolingo, a brand beloved for one of the most culturally fluent social personas on the internet, torched a chunk of that goodwill in 2025 by announcing an "AI-first" strategy that talked about cost savings while cutting the humans out of the message, shedding over four hundred thousand TikTok followers in weeks. And xAI ran the most literal version of the mistake this chapter is named for: in July 2025 it launched Grok's sexualised anime companion, Ani, straight into an app already heavily used by teenagers, on the assumption that a documented appetite for AI companionship was a licence to manufacture intimacy nobody had actually asked for. The backlash was immediate, child-safety groups raised the alarm within days, and regulators in France and India had opened inquiries within months. Every one of these was a confident, well-resourced brand acting on what it assumed young people wanted. None of them was listening.

Oatly's Reddit session belongs in this chapter as much as in the influence chapter, because it is the assumed-understanding trap in its purest form. The brand did everything a good brand is told to do.



If it feels like marketing, you have already failed.

PION100 UK EDITION, 2026



It went where the audience was, it sent a genuine expert rather than a marketer, and it opened itself to questions on a topic it knew well. What it did not do was consider that the room might have a different question in mind. It arrived to correct myths about sustainable food and was asked instead about its own investors and its own packaging. The brand had prepared an answer to the question it wished it were being asked. That is the failure mode this chapter is about, and it is not incompetence. Every element of the plan was competent. The gap was between the conversation the brand thought it was joining and the one already in progress.

The common thread through all of them is worth naming precisely, because it is the diagnosis a brand can actually use. These were not tone-deaf brands stumbling in the dark; they were brands that mistook their own frame for the audience's. PLT assumed young women aspired to the same "grown-up" minimalism the fashion establishment prizes. Jaguar assumed provocation would read as courage. Coca-Cola assumed efficiency would be forgiven. Duolingo assumed its fandom loved the brand more than the people behind it. Grok assumed the real, well-documented habit of treating a chatbot as a confidant meant an invented intimacy would be welcomed rather than intruded on, and aimed it at an audience that included children. In each case a plausible boardroom theory about young people substituted for the harder work of finding out, and the audience, fluent in detecting exactly this, punished the counterfeit.

12%

Of UK Gen Z discover brands through television advertising. Two thirds research them on social.

Surface-level understanding, the demographic data, the trend deck, the marketer who feels young enough to just know, is not the same thing as cultural fluency, and this generation can hear the difference in a syllable.

Now the other side, because the same period produced brands that speak the language so naturally their audiences do the marketing for them. The tell, in almost every case, is that these brands stopped broadcasting at young people and started participating with them. Corteiz is the purest example: Clint Ogbenna built a streetwear brand out of genuine fluency in Black British and London youth culture, grew it through guerrilla drops and scarcity rather than paid reach, and famously refuses to send free product to influencers, because its credibility rests on real wearers, not rented ones. Gymshark did it with community, building a billion-pound valuation on long-term athlete relationships and live events rather than top-down advertising. Monzo did it with product and word of mouth so effective that two-thirds of its sign-ups still come from personal recommendation, its coral card an organic conversation piece rather than a campaign. Greggs did it with self-aware humour and cultural participation, riding a spat over its vegan sausage roll to a 58% first-half sales jump. Aldi did it by winning the court of public opinion over a caterpillar cake with zero media spend and the equivalent of five million pounds in organic reach. And adidas did it by letting the Samba and Gazelle spread organically through culture before leaning in, sales climbing from a couple of hundred thousand pairs a month to millions. None of these brands performed youth. They earned their place in it.

What separates the two lists is not talent or spend; it is method, and the method is learnable. Look at what the winners actually did and the same moves recur. They co-created and built community rather than broadcasting, Monzo's referral engine, Gymshark's events, Corteiz's participatory drops. They used real voices, real wearers and real creators, rather than gifting influencers to read a script. They participated in culture instead of appropriating it, Greggs joining Veganuary, Diageo amplifying a Guinness trend its own drinkers had invented rather than manufacturing one.

TWO ROOMS

THE CONVERSATION THE BRAND PREPARED FOR

Myths about sustainable food

Is oat milk actually better for the planet.

Does plant-based farming use less land.

Is the science on dairy settled.

A sustainability director, briefed and credible.

THE CONVERSATION ALREADY IN PROGRESS

Who owns you, and what is that carton made of

Who are your investors, and what else do they fund.

Why is the packaging still not recyclable here.

What is your own climate footprint, audited.

A room that had been having this argument for years.

Oatly went to the right place, sent the right person and opened the floor. It had simply prepared an answer to the question it wished it were being asked. Nothing here is incompetence, which is what makes it worth studying.

FIG. 06



They moved at the speed of culture, Aldi trending within hours, Greggs answering a critic in real time. And they met young people on their own platforms in the native register, because the data is unambiguous that this is where the audience is: two-thirds of UK Gen Z research brands on social media and just 12% discover them through television advertising. The failures inverted every one of these moves, imposing a frame from above, performing authenticity instead of earning it, and arriving with a polished broadcast to a generation that no longer assembles to receive one.

There is a phrase from Pion's research that is worth putting on a wall: if it feels like marketing, you have already failed. It is stated as an observation about young consumers spotting forced digital engagement instantly, but it works better as a test. Not “is this good marketing” but “will this be experienced as marketing at all”. Almost every failure in this chapter passes the first test and fails the second.

This is why cultural intelligence is not a soft nicety but a hard commercial input, and the numbers bear it out. The evidence that young people reward genuine understanding and punish the counterfeit runs through everything above, from Corteiz's cult loyalty to adidas's organic millions to the perception gap that predicted PLT's stumble. And it should be held honestly, because some of the UK data complicates the lazy version of the story: younger British adults actually report trusting advertising more than older ones do, not less, which means the problem was never that this generation is uniquely cynical.

The problem is that it is uniquely fluent, quick to feel the difference between a brand that knows it and a brand that is guessing, and quick to reward the former with the one thing no budget can buy, which is being carried, unprompted, into the group chat. Cultural intelligence is simply the discipline of closing the gap the IAB measured: of making sure the thing you believe about this audience is something you actually know rather than something you assume.

The cliché register that follows is a working tool for exactly that discipline. Throughout this report the same received wisdoms kept colliding with the evidence, the confident industry lines that are true observations translated into the wrong language and therefore acted on wrongly. The register lays them out so they can be argued with in the most sceptical room in the building, because that is where they get repeated unchallenged and where campaigns quietly get built on them. It is not the argument of this chapter; it is the checklist underneath it, the specific places where assumed understanding most often goes wrong.

The instruction to carry out of this chapter is the one the whole report has been building toward. You are not failing to reach this generation because your message is weak or your budget is small. You are failing because you are speaking a language they do not recognise, built on an assumption about them that felt like knowledge and was not. Speaking to them properly does not require spending more or shouting louder. It requires the humility to find out rather than assume, the discipline to participate rather than perform, and the cultural intelligence to tell the difference between a truth about this generation and a cliché about it. Get that right and the audience carries your message into rooms you could never buy your way into. Get it wrong and no amount of reach will translate it. The chapter that follows turns this principle into the practical guide, the specific things this research found that a brand can pick up and act on.

THE CLICHÉ REGISTER

“Gen Z doesn’t drink”

FALSE

Polarisation, not sobriety: more committed abstainers and more re-engaging selective drinkers at once, with participation rising and the moderation story openly debunked by the trade’s own data.

“Young men have no friends”

FALSE, IMPORTED

A US statistic. Young British men are the least likely group to report no close friends; the real deficit is disclosure, not headcount.

“They’ve rejected marriage and kids”

FALSE

Deferred, not abandoned. Over 80% of unmarried under-30s still want to marry and nine in ten young women still hope for children; constraint delayed the milestone, not the aspiration.

“They don’t want to work”

FALSE

They want to work and the market is failing to hire them; the NEET rise is health-and-inactivity led, not refusal.

“They only care about price”

HALF-TRUE

Price sets the floor; one high-meaning splurge is defended above all, and “rich” means security, not display.

“Gen Z has no brand loyalty”

FALSE

Loyalty relocated to the barbell ends and to ritual: Monzo, Greggs, Aldi, Guinness, adidas. The middle churns.

“Sustainability drives their shopping”

FALSE, MISREAD

Economics drives it; the say-do gap is income, not hypocrisy. Green wins only when it is also cheaper or easier.

“Purpose or die”

FALSE

Purpose sits below product truth and turns toxic when performative.

“They can spot every ad and fake”

HALF-TRUE

Fluent, not infallible: a third of influencer ads carry no disclosure, and dupes are a normalised value system, not just a detection skill.

“Influencers don’t work, nobody trusts them”

FALSE, MISREAD

Trust and influence have decoupled. Influencers are the least-trusted profession and among the most powerful; a quarter of young people take daily cues from them.

“Young men are all red-pilled”

HALF-TRUE, MISREAD

Near-universal exposure, minority conviction. Most young men reject the worst voices; the real signal is unmet demand for purpose and role models.

“Religion is dead among the young”

FALSE, MISREAD

Christian decline is real and the revival claim was retracted; but non-Christian faith is at its youngest and most vital, and young British Muslims are the story.

“Nobody watches TV”

HALF-TRUE

The schedule collapsed; the shared moment survives, rarer and far bigger. YouTube is the new television.

“Monoculture is dead”

HALF-TRUE

Fragmented into niches, punctuated by rare, enormous spikes that still convene millions.

“Dating apps are dead”

HALF-TRUE

Contracting, not extinct; millions still use them, with the young the highest-reach group.

“Run clubs are the new nightclubs”

HALF-TRUE

A real revival, but class-gated, paid and metropolitan, not universal.

“A brand’s own AI can be their friend”

FALSE

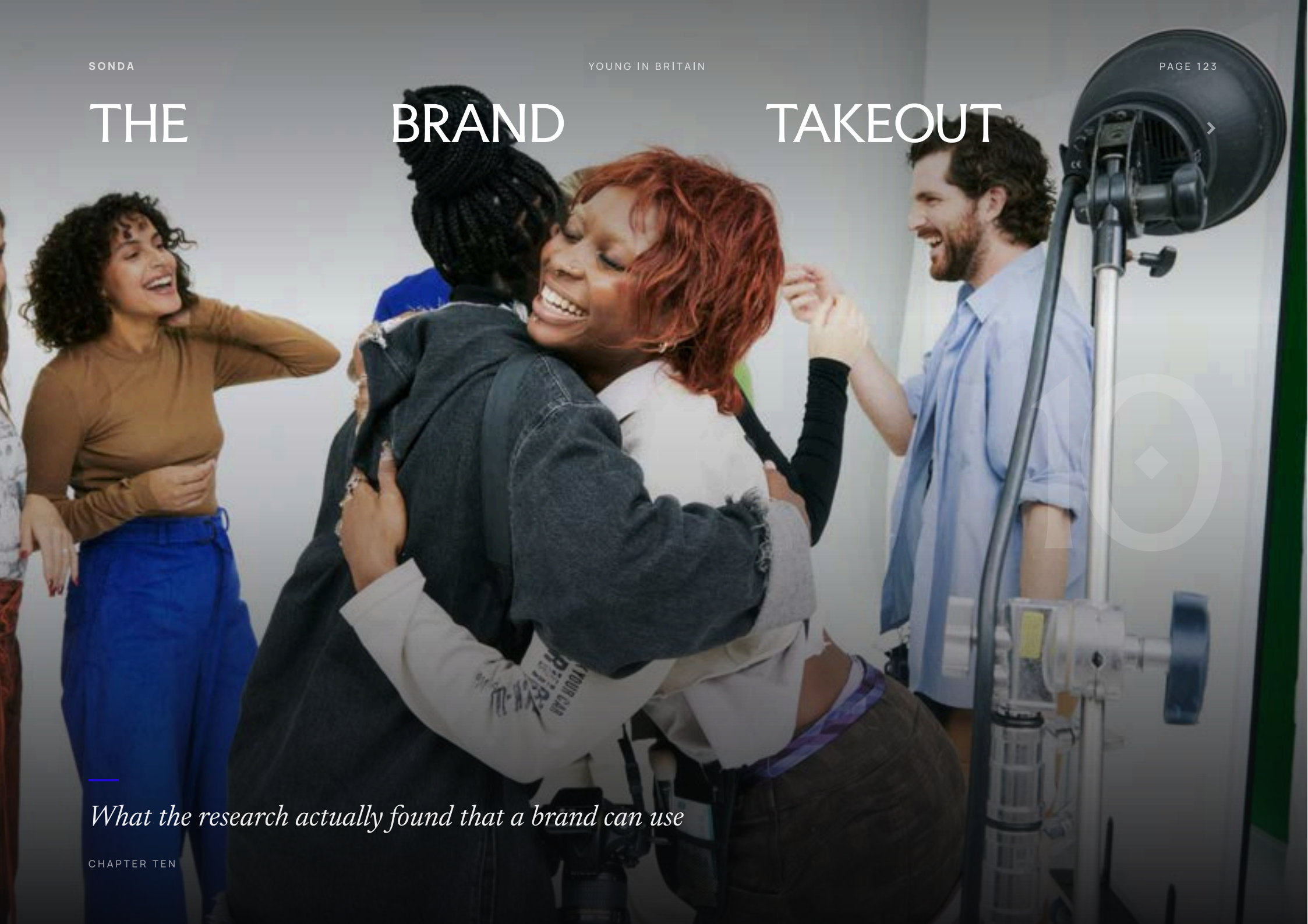
A meaningful share already treat a chatbot as a confidant, but a brand-built one reads as manufactured intimacy. The appetite is real; the licence is not.

“Chase the -core”

FALSE

Micro-trends die within a season; by the time a brand ships to one, it is already cringe. Durable style beats the churn.

THE BRAND TAKEOUT



What the research actually found that a brand can use

CHAPTER TEN

20

Findings, in the order the research produced them.

Twenty things a brand can pick up and act on

Young Britain does not hold still long enough to be captured once and filed away. The person this report describes at sixteen has moved on by twenty, and the picture it draws today will already be shifting by the time anyone reads it, because a generation is not a fixed target. It is a moving argument with itself, and that is exactly what makes marketing to them so difficult: not that they are unknowable, but that they are always a step ahead of whatever was last written about them. This research tried to understand them as honestly and as closely as it could, which is not the same as claiming to have understood everything, and it never will be. What follows is not the final word on young Britain. It is a starting point, the clearest picture this work could build, offered so a brand has somewhere real to begin.

01

Trust and influence have come apart, so build proof, not reach.

Influencers are the least trusted profession ever measured in Britain, 6%, below politicians, and a quarter of young people take daily cues from them anyway. That is not a contradiction; it is the single most important mechanic in youth marketing, because trust and influence are now two different things. Attention persuades; trust gets checked elsewhere, with friends, with reviews, on Reddit, increasingly in an AI answer. So stop paying for reach as if reach were belief, and start engineering proof: honest reviews, real wearers over rented influencers, and a presence in the places they go to verify. Being talked about truthfully on Reddit and being legible to an AI is not a campaign, it is plumbing, and it is worth more than most media budgets. The blunt test for any claim: if nobody else would repeat it unprompted, do not make it. And proof is not a caption. Young people can explain exactly how an image was smoothed or generated and still feel the effect of it anyway, knowing something is fake does not switch off the feeling it produces, so a disclaimer on an unrealistic picture does not undo the harm or the disbelief. The honest move is the image itself, not the small print underneath it.

02

The group chat decides, so build for the screenshot.

The real conversation about a brand now happens in a private chat no dashboard can see, where one screenshot and one line of commentary settle the verdict. More sharing happens in DMs and close-friends stories than on the public feed, which the industry keeps misreading as decline when it is actually where the power moved. So the question is not how many people saw it but whether one person forwarded it to a friend. If your content is not being screenshotted into a chat, it is not working, whatever the public numbers say, and no amount of reach substitutes for that one act of unprompted advocacy.

03

You are not competing with other brands, you are competing with everything.

When a brand's content appears, it sits next to Netflix, the group chat, a podcast and the game they were mid-way through, and nobody owes it a second. The bar is not beating the competitor's ad; it is being worth choosing over the thing they were already enjoying. That means entertaining them, teaching them something useful, or handing them an experience worth sharing. Anything less is just the interruption they have spent their whole lives learning to skip, and a third of them run an adblocker to prove it.

04

You can earn a place in a ritual, never manufacture one.

The brands this generation genuinely loves are wrapped inside a repeated, shared behaviour: the split of the G, the settling-up on Monzo, the matchday pint. Guinness surged on a ritual its own drinkers invented, and its only smart move was to notice and not smother it. Rituals cannot be briefed into existence; they can only be spotted and joined. The test is unforgiving: if the behaviour stops the moment the media budget stops, it was a campaign wearing a ritual's clothes, and they could always tell the difference.

05

Build them a world to move into, not a message to read.

The brands that hold real loyalty in this report never stopped at a campaign; they built an actual place. Gymshark's Lift events turned a clothing brand into a room people travel to stand in. Corteiz built a whole mythology around scarcity and mischief, a shop that opens in bursts, a swap that sends people running across London, and the mythology is as much the product as the puffer is. The Sidemen did not stop at content, they built a whole ecosystem around it, a cereal, a drink, a fried-chicken chain, a venture fund, each one another room in the same house. Discord and the interest-group server do the same job for smaller brands, a genuine digital campus rather than a page to follow. The instruction underneath all of it: do not write an advert and hope it travels, build a destination, physical or digital, that rewards the people who come back more than once, and let the mythology of the place do the marketing a campaign never could. A world only works if people can actually walk into it. A slogan is not a room.

06

Find your way into their everyday moments, not just their campaigns.

This generation's identity is not staged in one big scene; it lives in the accumulation of small, ordinary ones across a week, the mirror before a night out, the coffee bought on the way to work, the resale maths done quietly in a shop before a purchase. The fundamental move is simple to say and rare to do: find a genuine way inside a few of those moments, rather than interrupting them from outside with a message. Vinted already proves it without meaning to. Its whole idea, that nothing you buy has to be a dead purchase, now lives inside the ordinary act of shopping somewhere else entirely, no logo required, because the resale habit has quietly become how people think while standing in a shop. Most brands have not found their version of that yet. A running brand building its identity around the coffee people have together after the run, rather than the shoe they wear during it, is one shape that could take, though nobody has properly done it. The test either way is the same: would someone recognise the story in that moment even with your name removed.

A slogan is not a room.

ON BUILDING A WORLD

07

Usage is not love, and the mushy middle is dying.

Apple holds young Britain through the ecosystem and the blue bubble, not affection; Shein is the most used and least defended brand in the country, one cheaper option away from being dropped. High usage with no advocacy is not strength, it is exposure. Underneath that sits a market splitting into two, because young spending is a cheap disciplined floor plus one protected splurge, and the splurge is where identity lives. Two positions win: be the cheapest with genuine respect and never condescension, which is how Greggs and Aldi became identity brands, or be the one thing worth paying for. If you are neither, the product is the problem, and no communications budget will fix it. The question missing from most brand trackers is simply whether a customer would defend you to a friend without being asked.

08

Your second-hand price is part of your price, and the dupe is a verdict.

Vinted is now among the largest fashion retailers in the country and refurbished tech is normal, which means the resale market prices your product whether you take part or not. A young buyer works out the true cost as the price minus what they can sell it for later, which quietly makes a well-made thing cheaper than a cheap one, so resale value is now a product feature to design for, not a threat to fight. The same logic runs through dupe culture: when supermarket and Zara dupes of luxury goods are openly celebrated rather than hidden, that is not a detection failure, it is a verdict on your pricing, and the honest read is to treat the dupes in your category as free market research. And it explains the say-do gap on sustainability, which is not hypocrisy but income: green wins when it is also the cheaper or easier option, and never when it is sold at a premium to the comfortable.

09

Transparency is a weapon, because their whole life is about control.

This is a generation that budgets the night out and withdraws cash to make its own spending harder, managing money with a discipline their parents never needed against a future they half-doubt. To people whose financial life is an exercise in control, the price that is simply the price becomes a genuine competitive advantage. They read drip pricing, shrinkflation and dynamic pricing as betrayal, punished Oasis and Ticketmaster for it, and now the regulator fines alongside them. The same instinct governs data: an ad that follows them around, or targeting that reveals you know something they never told you, reads as surveillance and costs more than it sells. Nothing hidden is a positioning you can own while competitors keep tripping the wire.

10

Have values, do not take sides, and know the difference matters more than the topic.

Permission to speak is a hierarchy, not a blank cheque: mental health and climate sit near the top of what people will accept a brand engaging with, diversity and free speech close behind, while international conflicts and party politics sit near the bottom, and the line people are actually drawing is between a brand having values, fairness, honesty, treating people well, which is welcomed, and a brand taking a side, a party, a flag, a position in someone else's war, which is punished. The appetite for punishing you is also louder than the punishment itself: nearly half say they would boycott a brand they disagree with, and measured behaviour puts the real figure closer to one in eight, most outrage decaying within weeks unless an organised movement or an easy substitute keeps it alive. But silence is not the safe harbour it looks like either, on an issue you have already claimed, going quiet reads as hiding something, not staying neutral. The workable posture is not loud and not silent. It is consistent, on the few issues you have actually earned the right to hold.

11

Stop buying "Gen Z", because income, gender and family shape split this audience

more than birth year does. What a young person can afford predicts far more than the year they were born, and the Bank of Mum and Dad has already sorted them into those waiting for a transfer and those who know none is coming. The youth market is really several: graduates whose expectations just took a beating, a working majority in hospitality, retail, care and warehouses that almost no campaign is written for, and around a million outside work and education reachable only through real value and real local presence. Most youth marketing is made by graduates for graduates and then underperforms and blames the audience. Family shape adds another cut entirely, multi-generational households are simply more common in some communities than others, parents remain the most trusted source of money advice well into the mid-twenties, and a single nuclear-family image will misread large parts of the country. And across all of it, young men and young women now live in near-separate feeds and diverging politics, so a single campaign rarely reaches both. Segment by what is actually true of people, not by the convenient label.

12

Culture is the way in, and you cannot fake being in it, so fund it rather than colonise

it. This generation builds identity out of culture, football, music, gaming, anime, food, fashion, and can tell in seconds whether a brand belongs in a space or is a tourist taking photos. Cultural relevance is not referencing a trend, because by the time an ad is made the trend is dead and arriving late reads worse than not arriving. It is choosing the few spaces that genuinely fit, showing up consistently, and adding something real: money, a stage, a pitch, a venue. The grassroots end of youth culture is visibly starving, venues closing, scenes priced out, and a brand that quietly funds the culture earns what no sponsorship logo can buy. Two things sharpen the point. Fluency in Black British and diaspora culture is the price of entry, not a nice-to-have, because that is where the cool is actually made. And their culture is not especially British or even especially in English any more, subtitles are normal and the biggest anime opening in UK history happened while adland looked away, so the useful test on any idea is whether it would still work with subtitles. Earn your place in the everyday culture, and buy your place in the rare, enormous shared moments; never the other way round.

13

Be the free place to be.

The free places young people used to gather have mostly gone, and almost everything that replaced them costs money: the £7-a-head padel court, the £15 cocktail, the £5 coffee that is really rent on a table. This is the loneliest adult age group in Britain, young women loneliest of all, and a quarter of adults now see friends less because of money. That is the single biggest hole in young British life, and it is one a brand can genuinely fill. Somewhere warm to sit with no minimum spend does more than any campaign about connection. The related move is to design for how the night actually changed: it finishes earlier, and safety is a large part of why, with most young women wary after dark and spiking a real and widespread fear, so a well-lit, well-staffed, covered-drinks, honest-door-policy evening with a way home that works is not a compromise, it is where the market went. Get it right and say nothing about it; they will notice.

14

Speak to what young men actually need, and never through grievance media.

There is a real role-model vacuum for young men, and the manosphere rushed into it, but the demand signal underneath is not misogyny, it is a hunger for status, purpose, belonging and guidance that youth clubs, fathers and coaches used to meet. Most young men reject the worst voices; a minority do not, and lecturing them widens the gap. So the move for brands is to speak honestly to the underlying need, mastery, progress, community, through credible positive voices, and never to chase these men through grievance-adjacent content or to moralise at them. A campaign that could not survive being screenshotted next to a decent role model's words should not run.

15

Say when it is made by humans, and never let a machine play the friend.

Inside the industry, 82% of ad executives believe young people feel positive about AI-made advertising; in reality only 45% do, and the gap is widening, with the supposedly AI-native cohort the most resistant of all. The penalty follows the disclosure, not the quality, and it lands hardest wherever meaning is the product: food, beauty, craft, nostalgia, anything with feeling in it. Use AI as a tool and say so, keep human hands on the work that carries emotion, and notice that "made by humans" has quietly become a claim a brand can own while competitors trip the wire. Duolingo shed hundreds of thousands of followers in weeks when an "AI-first" message broke a value its charm had built, and charm cannot buy back a broken value. The same instinct runs deeper than advertising: a meaningful share of this generation already treats an AI chatbot as a confidant, and the evidence on whether that helps or harms is genuinely split, which makes a brand's own AI a serious trust decision, not a growth hack. Build it as a tool that is honestly a tool. Do not build it to be their friend.

16

Let them earn what money cannot buy, and serve the markets nobody is picking up.

The quiet finding underneath the whole report is that effort has stopped paying out in work and housing, so the young moved their effort to where it still does, the gym, the streak, the savings pot, the ranked game, which is why progress people can earn, milestones, mastery, ranks, outperforms almost any discount, provided it is genuinely earned and not a paywall wearing a game's clothes. And the same clear-eyed reading of the data exposes the money nobody is collecting: Black British women driving a wildly disproportionate share of haircare spend from a fraction of the population and still barely served, young British Muslims as the youngest faith group in the country and addressed by almost no one, alcohol-free sold at a premium to people who moderate precisely to save money, and the working majority that remains the least-marketed-to audience in Britain. None of these is a niche. This is simply what the market looks like when a brand reads the data instead of the deck.

17

Find out whether you have love or conversation, because they are not the same asset.

Two UK rankings this year disagreed completely about which brands are winning, because one measured how young people feel about brands and the other measured how they talk about them. Greggs topped the first. Dr. Martens topped the second. Both are accurate. Ask which one you have. If you are loved and rarely mentioned, your problem is that nobody has a reason to bring you up, and the fix is giving them one: something to customise, something to recommend, something to turn up to. If you are mentioned and not loved, your problem is that the product or the experience is not delivering on the attention you have already won, and no amount of further attention will fix that. The two conditions look similar on a dashboard and need opposite responses.

18

Segment by where the money comes from, not by how old they are.

The most useful cut of this audience anyone published this year splits UK 16 to 24-year-olds by two things: whether their costs are covered by family or by themselves, and whether they spend carefully or freely. Three quarters land in one of the two careful groups. The value is that it separates people who look identical on a media plan. Two nineteen-year-olds in the same halls, on the same course, can sit in different quadrants and behave like different customers, and the quadrant is the better predictor. Age and postcode will put them in the same box and get both of them wrong.

19

Make the loyalty scheme simple enough to hold in your head.

The three fast food brands with the strongest scores among UK 16 to 24-year-olds all simplified rather than enriched. Greggs dropped points-per-pound for buy a set number, get the next one free. Subway collapsed a tiered system into a flat 10% back. Neither offered more. Both offered something a person can state in one sentence without opening an app. A scheme that requires arithmetic to evaluate is a scheme that gets ignored, however generous it is underneath.

20

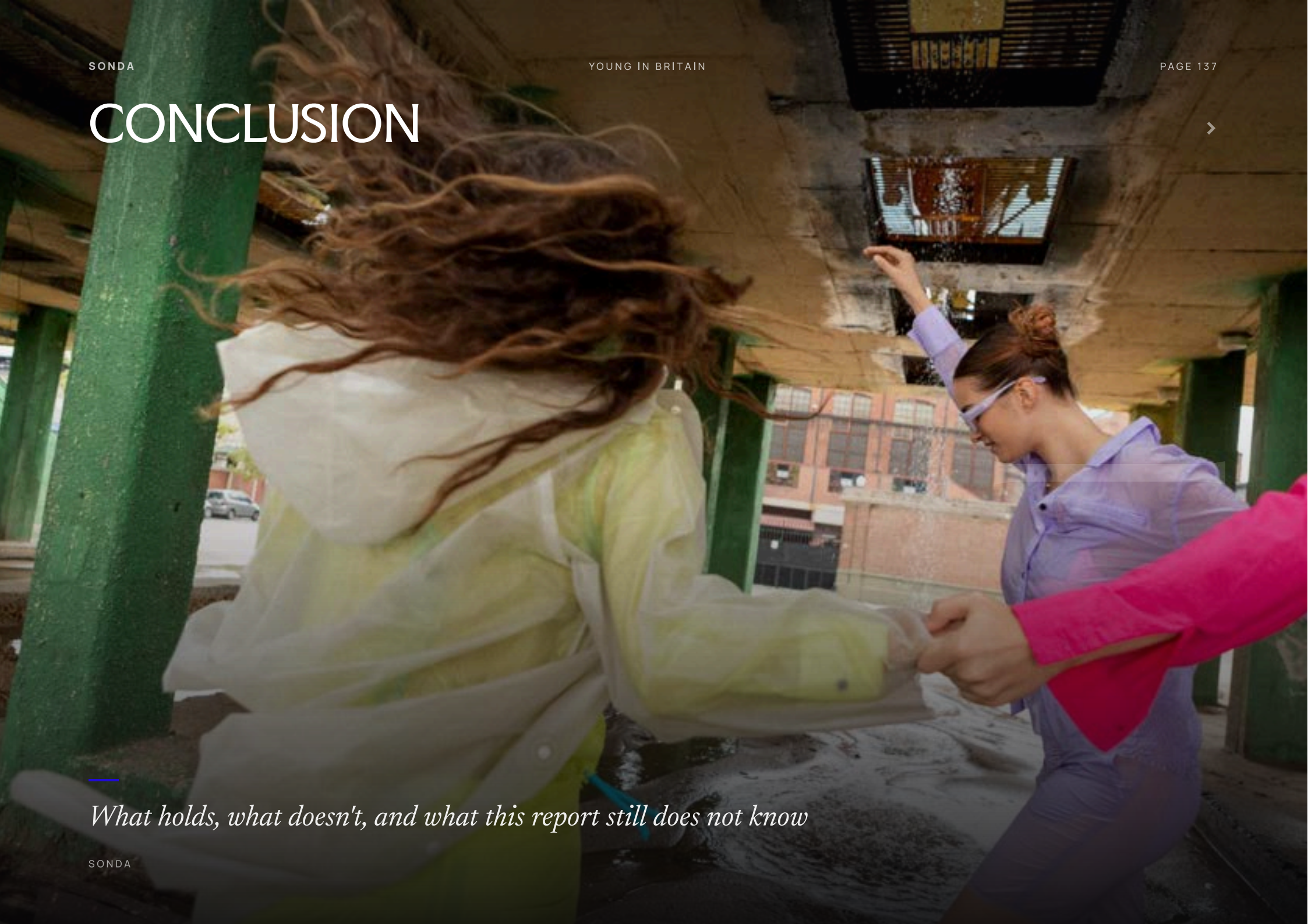
If a community already exists, join it. If it does not, do not build one.

Arsenal launched on Reddit by going into the supporters' subreddit that had been running since 2008 and doing an Ask Me Anything there. Sonos is present through an employee who has been part of the same community for years and answers questions that have nothing to do with sales. Both work because the room already existed and the brand arrived as a guest. The brands that fail here try to construct a community around themselves, which the audience reads instantly as manufactured. The test is simple: is there already a room, and would they let you in?

THE ONE-LINE VERSION

17. Find out whether you have love or conversation, because they are not the same asset. Two UK rankings this year disagreed completely about which brands are winning, because one measured how young people feel about brands and the other measured how they talk about them. Greggs topped the first. Dr. Martens topped the second. Both are accurate. Ask which one you have. If you are loved and rarely mentioned, your problem is that nobody has a reason to bring you up, and the fix is giving them one: something to customise, something to recommend, something to turn up to. If you are mentioned and not loved, your problem is that the product or the experience is not delivering on the attention you have already won, and no amount of further attention will fix that. The two conditions look similar on a dashboard and need opposite responses.

CONCLUSION



What holds, what doesn't, and what this report still does not know



A report that spends this much time checking other people's numbers owes the reader the same treatment of its own. So before the last word, the tensions this generation actually lives inside, honestly held rather than smoothed into a single tidy story, and then the things this report genuinely does not know.

Start with the one that looks like hypocrisy and isn't. This is a generation that says human creativity is essential while being unable to tell AI music from human music, that uses AI tools daily while its excitement for the technology falls and its anger rises, that treats a chatbot as a confidant while growing more determined to know where the humans are. That is not a contradiction to untangle. It is two different levels operating at once, the tool used at the level of utility and the symbol resisted at the level of meaning, and mistaking the second for the first is exactly how a brand ends up building an AI companion nobody asked for.

The same shape appears in money. Sustainability is a genuinely held value and reliably the second choice, because the Shein basket and the Vinted account belong to the same person, and the gap between them is income, not insincerity. It appears again in trust: influencers are the least trusted profession ever measured in this country, and a quarter of the young take daily cues from them anyway, because trust and influence stopped being the same thing somewhere in the last few years, and the industry that keeps asking whether young people trust a messenger is asking the wrong question of the wrong variable.

It appears in loneliness, where this generation is the most lonely adult age group in Britain and young British men are simultaneously among the least likely to say they have no friends, which resolves the moment you separate having people around from being able to be honest with them. It appears in risk, where the traditional dangers, teenage pregnancy, hazardous drinking, youth offending, have fallen to record lows at the same time financial and digital risk have climbed, because risk did not disappear, it moved to the arenas that are least visible and least supervised. And it appears in politics, where a cohort that places itself firmly in the centre also shows real appetite for disruption when the system lets them down, the resting position and the response to being let down, both true, in the same people.

Two more of these are worth naming because they surfaced late in this research and complicate the picture in useful ways. This is a generation more openly fluent in the language of mental health than any before it, and still, privately, ashamed of admitting how anxious it actually is, open in public and guarded in private, which is the shape a brand should expect from almost anything sensitive it tries to discuss with them. And it is a generation closer to its parents by any measure of daily contact than the stereotype allows, living inside a family group chat that functions as a genuine emotional hub, while a real and un-ignorable minority carries no such closeness at all, estranged, from a broken family, or building the thing they never had out of friends instead. Family, like almost everything else in this report, splits along income and circumstance rather than holding as one universal shape.

None of these is a puzzle waiting to be solved. They sit underneath one structure that this report keeps returning to because it is the actual spine of the argument: personal optimism holding steady while belief in the system collapses around it. That is not a contradiction either. It is the defining fact of this generation's inner life, and it does not resolve, because it is not meant to. It is the thing itself.

Now the harder part, said as plainly as the rest of this report has tried to say everything else. There is no reliable UK data on this generation's sexual behaviour, and the loud claims that circulate about it are mostly American and do not belong here.



It is not a contradiction. It is the thing itself.

ON THE SPINE OF THE ARGUMENT

Whether the leftward shift among young women is a permanent realignment or a life-stage effect that will soften is genuinely open and will not be settled by this report or any other for at least another election cycle. Whether the anti-AI instinct survives a decade of feeds saturated with the very thing it resists is a live question, not a settled finding. Stated willingness to boycott a brand runs far ahead of the boycotts that actually happen, and this report has been honest about the gap without pretending to know exactly where, for any given brand, the tipping point into a real and lasting one sits. And the hardest unresolved question in the whole of this work is the one it could describe but not answer: what actually reaches the young people who have stepped outside participation altogether, the excluded track this report named early on, because that is a question about outreach and trust that no amount of data collection alone will answer.

One honest note about the evidence. Two serious UK studies of youth brand preference were published this year using different methods, and they produced almost entirely different answers. That is not a flaw in either of them. It is a reminder that any single ranking of what young people love is a picture taken through one particular lens, and that the confident league table is the format most likely to mislead. Where this report has used both, it has shown the disagreement rather than resolving it, because the disagreement carries more information than either answer alone.

Add one more open question to the list. The leading-edge evidence that status has spread out of fashion and into groceries, wellness and travel comes from a self-selected global audience of early adopters rather than a UK sample, and there is currently no British study measuring whether it has reached the mainstream here or how far. The domestic signals point the same way, but pointing the same way is not the same as being measured. Anyone building strategy on it should treat it as a direction of travel, not a fact.



Stated once, at the end: they kept their end of it, and they no longer expect the country to keep its own. So they spend, work, vote and believe defensively, looking for control and for proof inside institutions they have stopped trusting, and the resources available to do that are spread so unevenly that the gap inside this generation is now one of the most important things about it. A generation in that position does not need to be sold a dream. It needs to be told the truth, shown the receipts, and trusted with the gap in between. That is what this report tried to do, and it is the only thing worth asking of a brand that wants to be believed by it in return.

UNDERSTAND THEM BEFORE YOU SELL TO THEM ›

The brands that got this generation wrong were rarely the ones who spent too little.
They were the ones who had already decided what the answer was.

WHY WE DID THIS

authentic connections > empty impressions

Nobody commissioned this. We wrote it because the same few mistakes kept coming up in the room, and because the confident version of this generation had drifted a long way from the people in it.

So we went to the sources, held them to a standard, showed the disagreements instead of resolving them, and stopped where the evidence stopped. What came back was more specific and less flattering than the received version, and a lot more useful.

A hundred and fifty pages later, the thing we keep coming back to is how ordinary most of it is. Nobody here is hard to reach. They are just harder to assume things about than most briefs allow for.

we start with people

before the channel plan

we move with culture

not after it

we show our sources

so you can check us

WHO WE ARE

We don't just help you reach your audience. We help you understand them, speak with them, and build lasting relationships with them.

We are a UK-based marketing strategy agency obsessed with people, because people drive everything. Their behaviours, values and culture shape every decision, and understanding them deeply is the only way to create marketing that truly connects.

We exist to help brands build strong relationships with their audiences. The result is loyalty, community, and impact that extends far beyond a single campaign. We combine data, cultural insight and storytelling to make work worth remembering. This report is that method turned on a whole generation.

data driven insights

people obsessed

impact focused

HOW WE WORK

01

Brand building

Every brand should have a point of view, a personality, something to stand for. Sometimes it just needs to be found, sharpened or rebuilt. We dig into your ambition and the cultural world your audience lives in, shaping the narrative, voice and identity that gives your brand real character.

02

Strategy & Integrated Campaigns

We build your marketing strategy around how your audience actually behaves: their culture, their context, what moves them. Then we bring it to life across every channel, creating real spaces for your brand and your audience to connect, talk and grow together.

03

Impact-Driven Campaigns

Campaigns built around something bigger than awareness. We align your brand with the causes, conversations and movements your audience genuinely cares about, creating work that drives measurable change and leaves a mark beyond the campaign itself.

04

Digital/Social

We study how communities behave online and build your presence around that: social, content, SEO, paid. Everything working together to put your brand in the right spaces, in front of the right people, at exactly the right moment.

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YOUNG IN BRITAIN

Young in Britain is a research publication by SONDA, a UK marketing strategy and cultural intelligence agency.

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