

The Generation A-Z: How to navigate a divided nation

Our new report, The Generation A-Z, aims to help businesses, governments and employers navigate their new challenge: how to unite, not divide the generations.



Portland

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Are you ready to navigate the changes in generations' attitudes?

The older we get, the more conservative we supposedly become. In our values, our consumption, and our politics. For decades this has held true. Each generation begrudgingly accepting the demise of the values of their youth in favour of stability and slowly becoming better-off. But Portland's research shows this is changing.

We set out to uncover some of the fundamental inter-generational divergences in relation to sentiments around society, the environment, employment, politics and the economy.

Our skilled research team uncovered a dynamic shift in values, societal expectations and priorities in the UK. Simply put, the difference in views of the oldest and the youngest is becoming ever more polarised, with the middle aged increasingly leaning more towards the young, than the old. It's a trend which looks set to grow in years to come and carries major implications for businesses and organisations operating in the UK.

It matters to brands, and for employers. It could also represent a post-dated death certificate for the style of politics which the current Conservative Party has depended on for decades, with voters getting reliably more Tory as they become older.

In response, Portland is here to guide you. We have mapped inter-generational views and attitudes to equip businesses, organisations and employers with the clarity to navigate the generational differences and social nuances of Britain in 2023. It's what we do.

From social issues, to coping with the rising cost of living and political affiliations, each generation holds distinct characteristics which underpin their outlook on life, work and everything in between. But while there is a chasm on some issues, on other things we are not so different, with — perhaps - unexpected commonalities across the age spectrum.



Most notably, our research shows people are retaining perceived 'young' views much later in life than their parents, and grandparents, before them. Middle-aged suburbanites are staying "progressive". Terry and June are no more.

Rather than slipping into these suburbanite stereotypes, people are increasingly reaching middle age with the views they developed in their youth decades previously. Just as the middle-aged (those in their 40s and 50s) are now as likely to be found on Instagram as people in their 20s, they also share the same beliefs as younger people about the need for businesses to take a stand on social issues or to stop discrimination against LGBTQ+ people. On a host of issues from rights around sexual and gender identity to how they perceive their finances to be faring, those who the stereotype would have us believe are drifting into middle-aged complacency actually share much more with their concerned and anxious younger fellow-citizens than they do with older people.

That more liberal opinions and values seem to be being retained longer into older age, challenges the perception of deep divides between each adjacent generation. Instead, what we appear to be seeing is a greater degree of consensus than may have been anticipated on some of the major issues of today.

Yet the result of this shift is an emerging cliff-edge between the attitudes of under 60s and older aged people. For example, 2 in 3 under 60s (66%) think it's important to fight discrimination against LGBTQ+ people, but only 48% of those aged 60 or over feel the same.

On the key issue, politically, of the cost-of-living crisis, those in early and late middle-age are significantly more likely to say they are worse off compared to a year ago than those aged 60 and over. While pensioners, it seems, have been better shielded from financial distress, this key voting block of people in their 40s and 50s are feeling the pinch worse than anyone — including the very young. There is also a stark difference between the middle-aged and the old on measures of patriotism, with 70% of the over 60s saying it is important that "businesses should take a public stance on upholding national pride". For the generation just below them, that figure is 61% — essentially the same as the population overall. It seems the oldest generations are no longer only out of step with young people, but Terry and June as well.



of under 60's think its important to fight discrimination against LGBTQ+ people



of those aged 60 and over feel the same



of those aged 45 and over feel proud to be British

While the value shift between old and young is starkest, dig a little deeper, and opinions on specific issues differ between each generation, with critical nuances to pay heed to. From Gen-X to Gen-Z, Millennials and Baby Boomers, each generation has been defined and shaped by the external influences of their day. Fluctuating patterns and trends across politics, working practices, education, economics, media and societal values, means there are real differences and expectations that set these distinct age groups apart.

Our sense of national identity, for example, is under scrutiny like never before. Our sense of 'British-ness' is up for grabs, creating a cohesive sense of belonging for older generations, but increasingly challenging for younger people who may view this through a more critical lens. 65% of those aged 45 and over feel proud to be British, compared to just 48% of under 35s.

An emerging, realist yet optimistic, younger generation are also more determined than their predecessors to hold employers to account and crave control in the workplace — 61% of under 35s now want a say on how the company they work at is run, compared to 48% of those aged 45+.

Our research shows we need to revisit some of the fundamental 'truths', which have previously shaped how Government, employers and businesses think about society and their influence on it. Time now to radically shake up how we engage everyone — from those aged 60 and over, defined by their love of tradition and unmoved by the rising tide of liberal views swelling behind them, to the more radical youth and the generations straddling the shifting middle ground connecting both ends of the age spectrum.



Amid this widening gap between old and young, employers, brands and politicians will increasingly be held to account in equal measure for their choices and social impact. What they need is the tools and insight to navigate the rift.

What you need, is the Generation A-Z.

Gabriel Milland
Partner, Research and Strategy

Our Research Process

We conducted in-depth research into the perceptions of the UK public on a wide array of issues, ranging from the importance of public services and the future of the workplace to what role businesses should be playing in delivering a more resilient economy. A poll of nearly 9,000 UK adults and five focus groups offers unique insights into the concerns, desires, and needs of the population across generations.

While clear 'safe zones' exist — topics which businesses and decisionmakers can rely on when communicating with any segment of the public — our research has allowed us to paint a picture of five generations, each with nuanced views distinct to their age group.

In order to meet the expectations that various groups have of businesses, to understand what kind of brand activism requires a response and to communicate across generations most effectively, it is imperative to understand these distinctions.

The division between the generations is largest between under 25s and those aged 60 and above — if you dig beneath the surface, you see that their values, politics and outlook on working life are often miles apart. When it comes to the middling generations, we see more fluidity and some surprising points of unity, but in many ways each age segment is distinct in their wants and needs.

Meet Our Generations

A snapshot into the defining characteristics of the five age segments we identified.



The Optimists Age 18 - 24

Beggars can be choosers? The Optimists are highly engaged on social issues and hold a broad range of progressive values. Yet, when it comes to getting work, or picking specific political policies, they possess a pragmatism which belies their years.



The Expectors Age 25 - 34

Asking questions, being told lies. More likely to be in steady jobs, but still less likely to own homes, the Expectors are an island between generations. They have the highest expectations on business and hold fierce views on social issues — often at their own expense — but they're the most likely to succumb to echo-chambers.



The Consolidators Age 35 - 44

The rising cost of living is hitting the over 35s hard. The Consolidators want their employers and businesses to actively support them and their children. But as the group that is more likely to own their home, and have the highest incomes, they focus most on the issues which directly impact them rather than wider society.



The Straddlers Age 45 - 59

Mind the gap. These children of the revolution now find themselves with one foot in the liberal values of youth and another in the traditionalism of older generations. Their finances are being squeezed, and they worry 'political correctness' has gone too far. But they are from the stereotype of middle-age conservatism that many think they represent.



The Conventionists Age 60+

Proud. Opinionated. Consistent. In many ways the Conventionists are the most united in their views of any group, outing national pride above all else. They're proud of the NHS, of British history, and of British products. But often their belief and strength of opinion puts them in direct conflict with the Britain of 2023 and the generations that followed.

Key insights

Navigating a land of differences

Unsurprisingly, there are fundamental differences of opinion between age groups on the most pressing issues of our time. There are clear threads, however, which drive the greatest feelings of both unity and division. But the extent to which political opinion, for example, shifts with age appears to be changing. In turn, this seems to influence many other areas of importance, unique to living in the UK in some cases, such as thoughts about the NHS, equality and our expectations of businesses, brands and employers. There are key areas that deserve closer scrutiny: sentiments about political and social issues, and thoughts on employment, businesses and the dialogue brands should be paying closer attention to.

Political and social issues

A retreating cliff-edge on politics and social issues but a nation still divided

The idea that with increasing age comes the adoption of more conservative ways of thinking is losing traction. The ‘cliff-edge’ at which we begin to see a shift in political thinking, is retreating. However, most people, across all age groups (over 60%), believe that UK society is polarised and divided, with many having fundamentally opposite beliefs and values. This research shows that to a large degree, we are actually much more united than a lot of people think we are. The perception of a divided society has gained traction, perhaps through the media’s focus on ‘culture war’ issues, when actually we all agree on quite a lot.

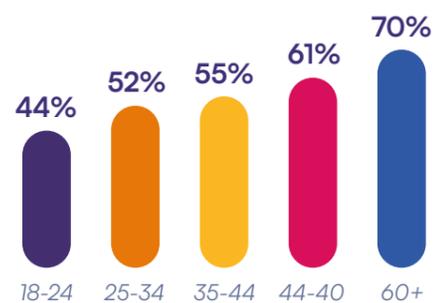
Britannia rules no more

When it comes to our sense of national identity and pride, those at either end of the age spectrum are poles apart. When asked about their sentiments on bring British, while many age groups agree the UK has a mixed history, merely 44% of under 25s feel an overall sense of pride in their country, with as many as 49% wanting the UK to formally apologise for its colonial past.

“It’s kind of hard to argue that you are proud. When I think the country has been built off colonizing nearly the whole of the world, with slavery being very integral to all the money that we’ve made... I personally don’t know how I could consider myself proud to be British.” Female, 24

A sense of shame for Britain’s past actions lessens with age, with those aged 60 and above feeling proud to be British overall (70%), and a clear majority (72%) agreeing that on balance the UK has been a force for good in the world. This older generation is more likely than others to support businesses with a ‘Britain first’ approach to its workforce (48%). In contrast, only a third of 18-24 year olds would be more likely to favour buying from a business that prioritised hiring British people.

Those who are proud to be British



“There are some things in history I’m also equally ashamed that we’ve done, but if you look at history, we have achieved so much...”

...We have brought so many things so far forward, helping other countries”

Female, 48

Politics needs to go back to basics

Some of the most pressing issues affecting daily life, including taxation, crime, expectations of our political leaders and the rising cost of living, again garnered shifting opinions that differ most significantly between the oldest and youngest in society.

Although the cost-of-living crisis is high on the agenda for all age groups, and the impact has been felt across generations, it is the seemingly squeezed middle, those aged over 35, who are feeling the pinch the most, more likely to say they are worse off than the previous year. Furthermore, only 44% of everyone under 60 think they are better off than their parents were at their age with this rising to 3 in 5 (61%) among those aged 60 and over.

Our polling and focus groups both highlighted a need for change and for political leaders to take firmer action on the challenges the UK is facing. What we are seeing is a public where many people are hungry for politics to once again be about “fixing things” — whether that be the economy, the NHS, stuttering transport or public services such as schools. In a country where the idea that nothing works is getting increasingly strong, the lure of “luxury causes” that seem unrelated to everyday life is weakening. For example, well over 70% of every age group chose the cost of living as an issue politicians should prioritise over the next year, and around 60% chose supporting the NHS. Well under 20% chose “making a success of Brexit” and below 15% of all age groups chose “restoring national pride.”

While tax cuts aren’t favoured by a majority of any age group, for those aged under 35, the idea of supporting tax cuts, even if that means public services will suffer, is far more palatable (30%) than it is to the 60+ (15%). Older age groups (45 and over) are considerably more likely than younger generations to say that businesses should focus on paying their fair share of tax as a top priority.

“I’d like to see us make some changes in the way the country is run and society is looked at and try and move things forward because this system isn’t working. I just get the horrible feeling that we’re just going to carry on as we are” Male, 45

In contrast, younger generations (18-35 year olds) were significantly more concerned about reducing crime and addressing issues that impact their local area. A third of 18-24 year olds say issues affecting the environment and climate change should be a priority for politicians, whereas, those aged 45 and older were more likely to highlight growing the UK economy, supporting the NHS and tackling immigration as key political issues.

Key insights

Views on equality remain unequal

One of the most divisive areas in relation to inter-generational points of view, is that of equality in all areas of society — from diversity and inclusion in the workplace, to the political agenda and healthcare. It's here we see the generation gap widen to a cavernous gulf, filled at best with misinformation and misgivings, and at its worst, by unconscious prejudice.

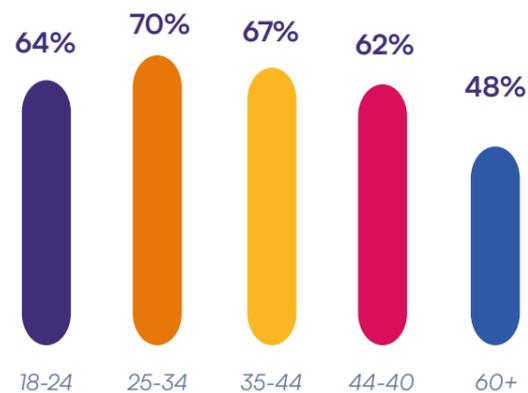
At one end of the spectrum, we have those aged 60 and over most likely to think that people are already treated equally in their workplace (50%), with merely 36% agreeing that there aren't enough minorities in powerful positions in the workplace. Instead, they believe we live in a meritocracy, where success is a direct result of how much effort one puts in, with representation not playing a role in people's success (65%).

In contrast, only 42% of 18-24 year olds think people are treated equally at work, and the lack of minorities in senior roles is seen as a much bigger issue with a majority (54%) saying there aren't enough minorities in powerful positions. Younger people are also much more likely than older generations to believe covert racism exists in most UK workplaces, with 52% of under 35s stating this is true against just 37% of those aged 60 and over.

One of the biggest divisions is seen in relation to LGBTQ+ rights, with the 60+ generation harbouring opinions towards the community which are out of step with UK law. Around half share more negative views about LGBTQ+ rights. Almost one third feel uncomfortable with same-sex marriage and adoption by same-sex couples. In stark contrast, a clear majority of everyone under the age of 60 is united in the belief that fighting discrimination against the LGBTQ+ community is important.

"It is important to fight against the discrimination of those in the LGBTQ+ Community"

% + total of those who agree



While different generations broadly support some LGBTQ+ rights, there is much greater division across all ages on how best to recognise the rights of trans people. The strongest sentiments in favour of affirmative action are felt by those under 35. A majority of under 35s agree, for example, that trans women should be allowed to use female bathrooms and 48% agree they should be allowed to take part in competitive sports with women. Amongst middle age groups, views are much more divided on the issue, with no clear consensus, while those aged 60+ are united in their firm conviction against. Interestingly, across all age groups, women are more in favour of these two policy changes than men, who are firmly against both.

The role of business - employer brand and expectations

I choose, therefore I am. Consumers expect action.

From politics to philanthropy, people power is having a moment. We are mobilising like never before behind the causes we care about, blurring the lines between personal and public activism and accountability when it comes to how we spend our time and hard-earned cash.

Consumers today have more choice than ever before and even more purchasing power, which brands ignore at their peril. Smart businesses are leaning into the societal shifts reflected in daily decisions and choices made by the conscious-minded consumer. From where they spend their advertising budgets, to supply chains, paying their fair share of tax, manufacturing and ESG policies, what influences brand decisions most are the evolving values underpinning each generation and how that plays out in the real world.

Our polling shows that everyone is suspicious of the carefully crafted rhetoric many businesses create, and while not all brands need to speak out on all issues, most agree that many brands have simply failed when it comes to pledges made on the environment. For those aged 60 and over, businesses taking a stance on social issues is less of a priority than for other groups (45% agree), preferring the focus to be placed on their products and core business.

"A good business is one that you could describe as ethical, that has sustainability initiatives involved in what they do. They don't encourage mass amounts of consumerism and a lot of waste as a result of what they do. [What they do] doesn't really tend to like damage society or the environment in the long run." Female, 24

Nearly half of 18-34 year olds would ensure a product they buy is environmentally sustainable, even if the price point is higher (47%). This philosophy is not shared by those aged 60 and above, where less than a third (32%) would have the same concern. Younger people are international, ethics-led consumers, but buying British doesn't work unless you're selling to older age groups.

What engages consumers most is action-based evidence of brand commitment, whether that's businesses paying their fair share of tax, which is important to older groups, or taking a stand on social issues, which a majority of other ages groups want to see. While overall people across all ages agree that businesses should do their bit in the fight against climate change (71%), treading the thin line between activism and political grandstanding is a tricky business. Animal rights, women's rights and the war in Ukraine are less contentious issues, regardless of age group, but taking a specific stance on issues such as the Israeli-Palestinian conflict, the Black Lives Matter movement, or trans rights, are major red flags for those aged 45 and over. Over 60% of all 18-34 year olds feel businesses should be bold when it comes to racial justice and championing equal rights for the LGBTQ+ community.

"I don't like businesses that get too political, whether it's things that I politically agree with or not. Certain businesses post a lot of stuff on Twitter about whatever political party. I think instead of taking the time to post this, you could actually be helping customers with things that are actually relevant. Keep politics separate to the business basically" Male, 45

Key insights

The war of the workplace

Navigating the wants and needs of the workforce has perhaps never been so challenging for employers. As retirement age has increased, people are now staying in work for longer, making for interesting times for businesses. Employers are faced with managing the expectations of a more traditionalist, older generation at the same time as younger people with radically different views on how they want to show up at work and what they expect in return. Alongside fair wages and ensuring an inclusive environment, employers have new and growing challenges in the war for talent.

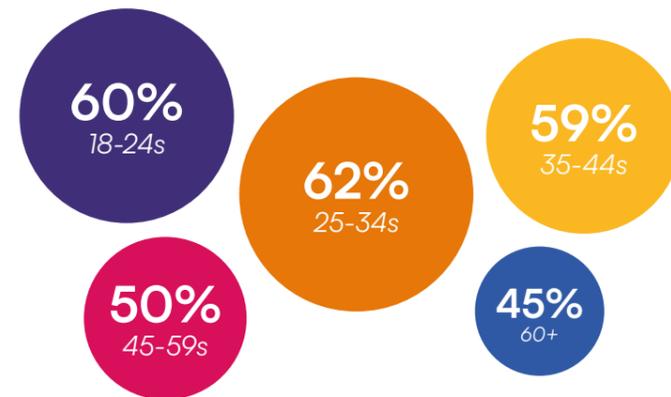
Power to the people. Younger people crave control

When asked about what matters to them in the workplace, our polling revealed younger people are significantly more likely than older generations to expect to have a say in how their company is run.

“I need to be able to have a say on how the company is run — it needs to be fair for workers as that is who actually makes sure the company runs” Male, 32

Importance of their workplace having ways for employees to have a say on how the company is run

% = total of those who find this important



Aligned with this, the idea of working for a business that takes a stance on societal issues is important for a majority of all generations under the age of 60, but particularly for 25-44 year olds. Younger generations are more willing to earn less money, provided the company they work for has values which align with their own, with 34% of 18-34s willing to earn less in this instance compared to just 15% of those aged 60 and over.

This may reflect how people aged 25-34 are less likely than previous generations to own houses, have children and shoulder the additional costs this can carry. But perhaps it is more of a nod to how lines between ‘work’ and ‘life’ have become increasingly blurred, with work no longer simply a 9-5 activity that pays the bills. An increasing sense of how, what and who we work for must fit with our very identity and filter through all aspects of our lives. But the demands on businesses to provide more perks, such as free meals in the office, support with transportation costs, bonus vouchers and more flexible working hours is high. Our research suggests that the younger generations are willing to accept lower pay as a trade-off for deeper alignment with their values and broader expectations of employers.

“Ways of working and the culture of a company are absolutely crucial, it’s not just all about pay” Female, 27

However, when it comes to the relatively new practice of zero-hour contracts, perhaps more associated with the gig economy generally populated by the adventurous young, it is the older generations (35 and over) who feel these are unfair and should be banned.

Representation in the workplace is also most important amongst 25-44 year olds, who are more likely to prefer their employer to have practical policies in place. For instance, they are more likely than other age groups to want to see their workplace have policies improving diversity and inclusion (67% vs 61% on average) and good childcare practices (67% vs 59% on average) in place.

What do we want? One size doesn’t fit all when it comes to benefits packages

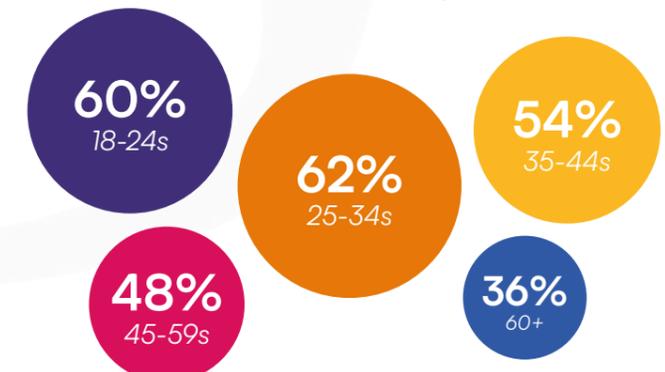
Employees aged 18-34 say receiving practical help from their employers, in terms of healthcare, transportation to the office and free meals, is an important consideration when choosing where to work. Similarly, 25-44 year olds care most about workplaces having supportive policies in place on D&I, gender pay equality, mental health support and childcare.

We see a gradual shift in priorities as age increases, with those aged 45 and above being slightly less likely than younger generations to demand different benefits and policies put in place by their employer, but more likely to want a fair salary for their role.

Those under the age of 45 are more likely to say that employers still have a long way to go in relation to diversity and inclusion. People aged under 35 are more likely to recognise that there are not enough minorities in powerful positions in the workplace, also believing that diversity at work promotes equal opportunities and that diversity quotas help bring fresh perspectives and thinking (61% vs only 36% of those aged 60 and above).

“Diversity quotas help and bring in fresh perspectives to the workplace”

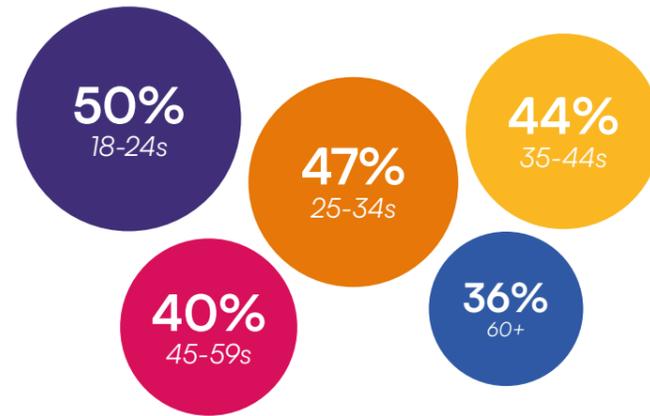
% = total of those who agree



When it comes to the work environment itself, as many as half of 18-24 year olds would prefer to be part of a workforce filled with people who are similar to themselves. Another 54% of all under 35s are more likely to prefer spending their time in a bubble with others who share their opinions on different matters. This group also strongly believes that other generations don't understand the hardships they face (58%), although interestingly, all age groups think employers should have supportive mental wellbeing policies in place and offer fair salaries.

"I prefer to work somewhere with lots of people like me than where there are lots of different kinds of people"

% = total of those who agree



Mapping the wants and cares of the generations

Mapping the generations



The Optimists
Age 18 - 24

Lifestyle

The Optimists are most likely to be found living with their parents (39%). Otherwise, they're in university accommodation or in their first rental properties, and over half (52%) live in urban areas. They're also the most eager to leave the nest, with 60% wanting to live somewhere other than their birthplace compared to 51% of all ages.

1 in 5 have a part time job, more than any other age, while a quarter are students. 8% are not in employment, more than twice the ONS national rate.

4% of our sample were gender non-conforming, the highest in any age group, compared to a 1% national average.

Generally, 18-24s follow the news, including on social media. This group's top news source is TikTok, followed by YouTube and Instagram.

Politics

"What do we want?" Despite lower news consumption, Optimists are the most engaged politically, with 3 in 4 having taken a political action in the last year. They're also the most likely to share their views on social media.

Optimists have the broadest set of political priorities of all generations. As the generation facing the greatest implications from inaction, they also put the greatest political capital on the planet. 1 in 3 think climate change is one of the most important issues for politicians to tackle, compared to just 1 in 4 of the general population.

While like others they want to see politicians backing the NHS and tackling the cost of living, 1 in 3 think reducing crime is a priority — more so than any other age.

With a need for more money in their pocket, the Optimists take a short-term but arguably pragmatic view on tax. Nearly a third support tax cuts at the expense of public services, compared to less than a quarter of the wider population.

Cost of living

With many still living at home, Optimists have been shielded from the worst of the cost-of-living crisis. Only 44% feel they're worse off financially than last year, compared to 59% of all ages.

While 41% want to see their employer increase wages in line with inflation, Optimists are also most likely to support other measures like meals being provided at work. 29% support this compared to 23% of all ages.

Health & society

Optimists are post-nationalist. Only 44% say they're proud to be British compared to 59% of all ages. Not only is this the only group where national pride is a minority value, just under 1 in 5 state they are ashamed to be British, the highest proportion of any age. 49% think the UK should apologise for its colonial past, compared to the all-age average of 36%.

Optimists are also the most supportive of trans rights of any age group, although views are divided when it comes to transwomen competing in, and with, other women in sports.

The under 25s have the highest hopes for the future of the UK's healthcare system. 42% feel optimistic about NHS care in future years, compared to just 34% of all ages.

They're also the least concerned about budget cuts to the NHS, just 62% compared to 76% of all ages. Perhaps this is because they already expect a new model — nearly 1 in 5 under 25s think the NHS should alter its founding principles and not remain free for patients, the highest proportion of any age group.

Business

Optimists expect businesses to enter the fray on some of the most politically charged social issues.

Under 25s are the most likely to want businesses to take a stance on racial causes like Black Lives Matter (64% compared to just 39% of Conventionists) and the conflict between Israel and Palestine (57% compared to just 38% of all ages).

When it comes to making purchasing decisions, Optimists are the most likely age to always ensure products they buy are environmentally sustainable, even if it meant spending more money (48% compared to 39% nationally).

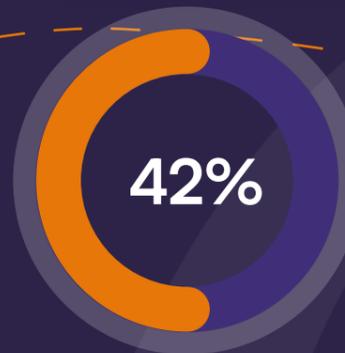
In the workplace

Optimists take a pragmatic approach to employment and recognise that their desire for a value-led career comes at a price.

Of all ages, they most want to work somewhere which aligns with their ethical standards, even if it came at the expense of pay (35% compared to 24% nationally).

Unlike other age groups, they also appreciate the flexibility of the gig economy. Only 44% agree zero-hour contracts should be banned — the only age group where this is a minority opinion.

Despite supporting a range of diversity policies, a majority of under 25s want to work with people who are similar to them (50% compared to 42% nationally).



feel optimistic about NHS care in future years

Mapping the generations



The Expectors
Age 25 - 34

Lifestyle

Expectors are city dwellers, with 45% living in urban areas, and 40% in suburban.

While over a third have bucked the trend and become homeowners, they are the generation most likely to be renting, with 45% in private or social rentals. 1 in 7 remain living with their parents.

Expectors have the highest rates of full-time employment — over 67% compared to a national average of 44%.

Expectors have the broadest media consumption habits of any age, checking the full mix of social and traditional media. But their top three news sources are Facebook, Instagram and online news platforms.

Politics

Expectations may be high, but their activism plays second fiddle to the younger Optimists. 70% have taken a political action in the last year compared to 75% of 18-24s. Their one saving grace is they're most likely to have signed a petition.

The Expectors share similar political priorities to Optimists, with a broad range of support for tackling climate change and the cost of living. But, perhaps due to their increased presence in the labour market or being those most likely to have voted against, they put the most weight on politicians making a success of Brexit.

Health & society

Only a slim majority (52%) of under 35s say they are proud to be British compared to 59% of all ages, and 45% of Expectors want Britain to apologise for its colonial past.

Of all ages Expectors think it's important to fight against the discrimination of those in the LGBTQ+ community (70% compared to 60% of all ages).

Like their radical younger cousins, the Expectors are also supportive of the rights of transgender people, with over half (54%) agreeing trans women should be allowed to use female bathrooms.

More Expectors remain optimistic about the NHS's future than not, but the gap is closing.

Living up to their name, they are most open to always paying for NHS treatment if it meant they were seen quicker.

Business

Expectors place the greatest importance on what businesses say. 58% think it's important to take a stand on social issues, compared to 52% of all ages.

However, the issues they want to see businesses taking a stand on are less politically radical than younger ages. Instead, they care most about businesses speaking out about animal rights (63%) and improving women's position in society.

In the workplace

Expectors may represent the new shareholder class. They place most importance of any age group on having a say on how the company is run (62% compared to 51% of 35+).

They're also the most critical of employers' efforts on diversity and inclusion — 58% agree that workplaces have a long way to go on these issues, compared to 47% of 45 and over. Indeed, along with Optimists, a majority agree there is covert racism in most UK workplaces.

Expectors most strongly see representation as a critical way of encouraging people to enter key careers (60% vs 43% of 45 and over), and that diversity quotas are a means of improving social mobility, representation and bringing fresh perspectives. 62% of Expectors support quotas, versus only 42% of those 45 and over.

On employee support, they care more than other ages about their employer taking action to address the gender pay gap, having a clear policy on diversity and inclusion, and ensuring their supply chains and labour are ethical.



70%
have taken political action in the last year

Cost of living

Independence comes at a price, and the under 35s are feeling the impact of cost of living — with 1 in 2 worse off financially than last year.

While they share support for meals in the office, home working and pay rises, Expectors place the most emphasis of any age group on employers providing transport expenses and mental and wider health support during this period.



1 in 2
are worse off financially than they were last year



Mapping the generations



The Consolidators
Age 35 - 44

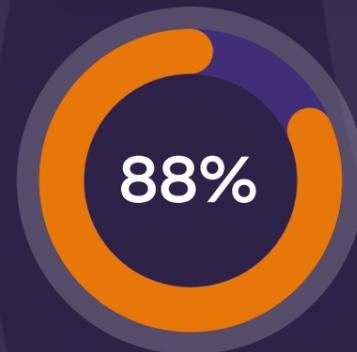
Lifestyle

By definition, Consolidators are accumulating their assets.

They have the highest incomes of any age group. They're the first generation where over half own homes. They're also the first you're more likely to find in suburbia than an inner-city flat-share - 49% live in suburban areas versus only 34% in urban.

Consolidators are the most likely to be stay-at-home parents or carers and hold more part time jobs.

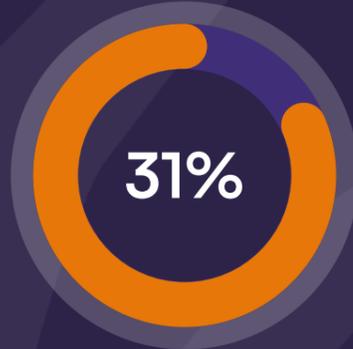
Consolidators get more of their news from Facebook than any other age group. However, they're just as likely to use online news platforms and watch broadcast news.



have felt impacted by the cost of living crisis.

Politics

Consolidators mark a shift in political priorities away from climate issues towards more personal citizen-first politics. There is much more focus on cost of living and, more than any other generation, they want politicians to support schools and other public services aside from health. 31% see this as a priority compared to 25% nationally.



want politicians to support schools and other public services aside from health

Cost of living

With the pressures of child-care, the Consolidators are feeling the pinch more than most. 88% have felt impacted by the cost of living crisis — compared to 80% of under 25s.

Besides wage increases, Consolidators most want employers to provide better flexible working hours, allow home-working and offer additional pension contributions.

Health & society

National pride has a clear majority among the Consolidators with 55% feeling proud, but their views of Britain's past are more mixed with 39% feeling ashamed of colonialism.

Despite their broader liberal values, the Consolidators are a group where sentiment towards trans rights is most divided.

As they and their families begin to come into more contact with healthcare services, Consolidators are the first age to lose hope with the NHS. 40% are pessimistic towards its future, compared to 34% who are optimistic.



Business

The Consolidators share many of the same views on business and corporate stances as the Expectors, believing strongly that they have an important role in making society fairer for minority groups such as ethnic minorities, the LGBTQ+ community and those with disabilities (62% compared to 55% of all ages).

However, when it comes to their view of corporations taking stances on specific issues, they're more interested in animal rights and local causes than younger ages.

More so than younger generations, the Consolidators make their purchasing decisions based on price and durability.

In the workplace

Consolidators prioritise themselves when choosing a workplace. They care most about their employers having good childcare options, flexible working arrangements and mental health policies.

Perhaps weary from more years spent in work, they feel more strongly than all other ages about employers not contacting them outside of working hours (65% compared to 61% of all ages).

Mapping the generations



The Straddlers
Age 45 - 59

Lifestyle

Hello Terry and June — a majority of Straddlers call suburbia home and slightly more still live in urban areas than rural.

The earliest age at which people begin retiring, 12% of this age group are not employed, three times the ONS national rate.

Straddlers mark the point at which media consumption habits pivot away from social and online towards traditional sources. Their top source of information is TV news (51% compared to 30% of under 45s), with newspapers and Facebook also commonly used.

Politics

Straddlers feel stronger than all other ages that the top political priority over the next year is the cost-of-living crisis — 87% versus 72% of under 25s.

The Straddlers mark the point at which political activism switches from a majority to minority behaviour, with only 46% having been active in the last year compared to 57% of under 45s.

Health & society

Straddlers mark the point at which it becomes clear Britishness is value of the old — with over 60% being proud, compared to less than half of under 35s.

The Straddlers have lost hope with the NHS, with the smallest proportion feeling optimistic about its future of any age. In line with this, they're also the generation most willing to sometimes pay for healthcare if it means they're seen quicker.

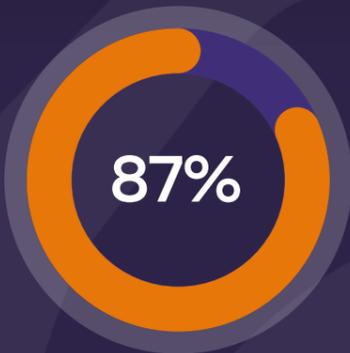
Business

Businesses taking bold social stances should be worried about the Straddlers.

This generation is the first where a majority would prefer it if businesses focused on their products over taking a stance on social issues. (51% compared to 46% of under 45s).

Furthermore, while all ages are sceptical of businesses taking a stand, the Straddlers lead the pack— 57% believe corporate commitments are usually hollow.

When buying products or services, Straddlers are most likely to go with the lowest price — 19% see this as the most important factor in decision making, versus just 11% of under 35s.

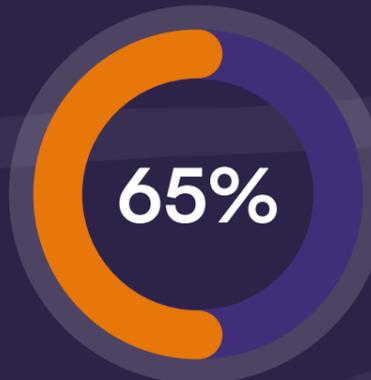


feel that the top political priority over the next year is the cost of living crisis

Cost of living

The Straddlers are most likely to see themselves as worse off financially now than they were last year — 67% compared to 59% nationally. They're also most concerned about its impact over the next six months — 86% saying this compared to 74% of under 35s.

The Straddlers feel most strongly that employers should offer inflation matching pay increases to tackle the crisis — with 60% supporting it, compared to 55% of all ages.



think employers should not contact them outside of working hours

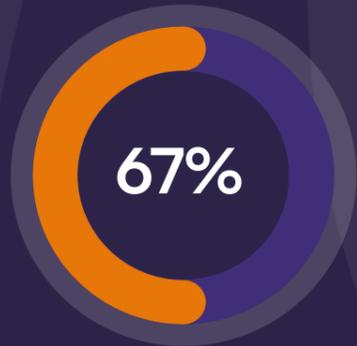
In the workplace

The Straddlers are the dividing line on employee expectations, especially when it comes to perceptions of equality in the workplace.

Unlike younger generations, Straddlers prioritise careers which offer fair salaries and employee benefits over aligning on values.

They value the representation of women and ethnic minorities in the workplace less too. 58% compared to 67% of under 45s think it's important.

Straddlers are the first generation where only a minority agree diversity quotas help with social mobility, 43% compared to 58% of under 45s.



see themselves worse off financially now than they were last year

Mapping the generations



The Conventionists
Age 60+

Lifestyle

While the pull of the suburbs is high, Conventionists are the most likely to live in rural areas (28%) and are the least urban of any generation.

By a significant margin they have the highest rates of home ownership. 3 in 4 own a home compared to less than 1 in 5 of under 25s.

While 60% of Conventionists are retired, almost a third remain in some form of employment.

Despite this, the Conventionists are up to date on politics and current affairs, checking the news more than any other age — 42% at least once a day compared to a national average of 36%.

Unsurprisingly, the 60 and over are significantly more likely than any other age to get information from TV news and newspapers, although online platforms are also favoured.

Politics

Conventionists are the least active and hold the most traditional political values. More so than other age groups they want politicians to support the NHS and grow the economy.

They're also most likely to view backing Ukraine and immigration as important political issues.

Interestingly, Conventionists are the most firmly against tax breaks for the wealthy with 3 in 4 agreeing it's unfair, compared to 1 in 2 under 35s. Is this wise old age recognising the importance of fully-funded public services, or self-interest in protecting their support from the state?

82% of Conventionists agree investing in green energy is a way to achieve more energy security — more so than any other generation.

In the workplace

Unsurprisingly, Conventionists are much more likely to be retired than any other age group (60%). While Conventionists value a range of workplace policies to some degree, fair play is ultimately the priority for them, with nearly 9 in 10 (87%) saying it's important when choosing a workplace. Having a say on how the company is run is less important to them than for any other age group.

While a slight majority agree that representation promotes upward mobility, Conventionists are also the least likely to think that there aren't enough minorities in powerful positions at their workplace (36%) or that there is covert racism in most UK workplaces (37%).

Health & society

By a considerable margin, Conventionists are the most nationalistic, 70% say they're proud to be British, and almost half actively disagree that Britain should be ashamed of its colonial past.

Explaining many of their views on wider policies and business action, Conventionists are least likely to consider discrimination to be an issue and the most likely to harbour prejudiced opinions.

For example, just 41% are comfortable with same-sex couples adopting, while 65% of all under 60s are. Over 60s are also the only age where a clear majority actively disagree that transwomen should take part in competitive sports with other women (61% vs 34% of under 60s).

While Conventionists are the most pessimistic about the future of the NHS, they hold most strongly to its founding principles. 85% think the NHS should remain free for patients, compared to 79% of all ages. 38% of would never be willing to pay for healthcare, compared to 27% of under 35s.

Conventionists are the most concerned generation about cuts to NHS funding — 82% compared to 76% of all ages.

Business

The Conventionists care least about businesses taking a stand, they're the only generation where a minority think this is important (45%).

A clear majority (59%) prefer when businesses focus on their products over their corporate stances, however 66% think it's important businesses give back more than they take compared to 55% of under 25s.

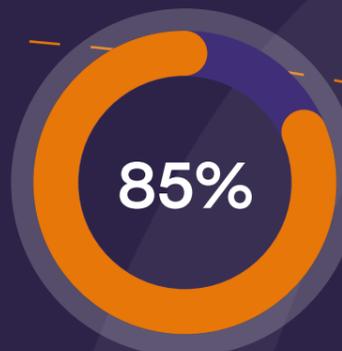
If businesses are speaking out at all — the Conventionists want to see companies upholding national pride (70% vs 53% of under 45s) and explaining how they're making a success of Brexit (72% vs 54% of under 45s).

The most important factor when choosing to buy products or services is whether they are long-lasting and durable, 21% compared to 13% of under 45s.

Unlike other generations, their purchasing decisions are also based on locality and Britishness. 48% are more likely to buy from businesses which prioritise hiring British people, compared to 35% of under 35s.

Cost of living

With considerably more assets, the Conventionists are seeing less severe financial impact than the squeezed middle, with just 20% saying they're greatly impacted compared to an average of 33% for under 60s, although they are far more concerned than under 35s about the next six months.



85%
think the NHS
should remain
free for patients

Comparison at a glance

Theme	Issue	18 - 24	25- 34	35 - 44	45 - 59	60+	All age average
Status	Home ownership	18%	37%	52%	61%	74%	54%
Politics and social issues	Taking part in political action (e.g. signing a petition, volunteering, donating, demonstrating)	75%	70%	57%	46%	41%	54%
	Feeling impacted by cost of living	80%	84%	88%	87%	82%	84%
	Worse off financially than last year	44%	52%	55%	61%	70%	59%
	Proud to be British	44%	52%	55%	61%	70%	59%
	Think the UK should be ashamed of Britain's colonial past	50%	44%	39%	32%	24%	35%
	Optimistic about the NHS	42%	38%	34%	31%	33%	34%
	Concerned about NHS funding	32%	71%	75%	78%	82%	76%
	Important to tackle discrimination against LGBTQ+ people	64%	70%	67%	62%	48%	60%
Businesses	Statements businesses make are not followed by actions	54%	56%	56%	57%	55%	56%
	I always ensure products / services are environmentally sustainable, even at expense of cost	48%	45%	43%	39%	32%	39%
	Businesses should take public stance on Black Lives Matter	64%	63%	59%	51%	39%	53%
	Businesses should take a public stance on upholding national pride	49%	52%	57%	61%	70%	60%

Theme	Issue	18 - 24	25- 34	35 - 44	45 - 59	60+	All age average
	Businesses should take public stance on climate change	63%	70%	70%	72%	76%	71%
	Agree it is important for businesses to take a stand on social issues	52%	58%	56%	52%	45%	52%
Workplace	Important to have good childcare practices	82%	67%	75%	81%	86%	87%
	Important to have fair salaries for the role	82%	67%	75%	81%	86%	87%
	Important to have a say on how the company is run	60%	62%	59%	50%	45%	53%
	Diversity quotas help and bring in fresh perspectives to the workplace	60%	62%	54%	48%	36%	59%
Channels	Preferred channel for news from own employer	Internal emails (33%) WhatsApp (31%) or social media (29%)	Internal emails (49%) Intranet blogs (29%) or WhatsApp (28%)	Internal emails (53%) Intranet (30%) or WhapsApp (28%)	Internal emails (60%) or Intranet (28%)	Internal emails (58%) or phone / video calls (21%)	Internal emails (53% or Intranet blogs (27%)
	Top channels for business news	TikTok (39%) or Instagram (38%)	Facebook (39%) online news (34%) or Instagram (34%)	Facebook (39%) or online news (39%)	TV News (51%)	TV News (65%)	TV News (46%)

Data collected 7-17th October 2022

Unifiers

What unites people across generations?

It's true there are stark differences in the values and perceptions that different generations in the UK hold. The insights drawn from our research have so far shown clear inter-generational variation, particularly regarding expectations of businesses and employers.

But businesses, politicians and employers can be more confident when it comes to some issues. Our research has revealed strong areas of unity which bring ages together. There is enough common ground and clear safe zones that with our guidance, they can communicate universally with clients and stakeholders across generations on issues which a large majority of people see as crucial.

Top 5 unifiers across generations

1

The negative impacts of the cost-of-living crisis are felt across generations, with overwhelming majorities of all age groups expressing alarming levels of concern about the continued impact the crisis will have on them and their loved ones.

82% of the UK public agree that cost of living is the most important issue that UK politicians should tackle in the next year

A staggering **4 in 5** people of all ages have already seen the cost-of-living crisis impact them personally

7 in 10 or more people across each generation worry about the impact that cost of living will have on their finances over the next 6 months

One timely example is the acute cost of living pressures in the UK, which have in fact brought the public together. People across generations are unanimously united in their desire for politicians in the UK to urgently tackle these pressures, and society also still shares a strong sense of pride in the NHS, which they fear is being neglected.

We have outlined five 'unifiers' capable of bridging the generations, including the considerations that the determined younger generations as well as the more conventional older generations have when it comes to making purchasing decisions.

2

The NHS continues to be a source of pride for the UK public — not only is its future a top priority for all generations, but the population is more than twice as likely to say the country should be known globally for the NHS over than anything else. Although this research was carried out before the winter crisis of early 2023, this sense of pride is deeply embedded across society — even amid current concerns.

#1 area that every age group in the UK wants the country to be known for globally is the NHS

Yet, the public are united in their concern around the future of the institution with at least **7 in 10** people of all ages are worried about cuts to NHS funding

Another **7 in 10** people, a clear majority of all generations, strongly agree that the NHS should remain free at the point of use

3

The UK public largely agree that it's imperative for businesses to use their power to create positive change. However, most crucially, any pledges must be followed by genuinely impactful action as people across generations are sceptical about the promises companies make.

A majority of all generations agree that it's important for businesses to be net contributors to society and give back more than they take

More than **3 in 5** of each generation think that businesses have a responsibility to use their resources to create positive change in the world

4

Despite some distinct generational divisions, there are some 'safe zones' that businesses can rely on for unified support, with issues around climate change, the Russian invasion of Ukraine and women's rights resonating equally with both younger and older generations.

Fighting climate change is impacting all generations with an average of **71%** thinking that businesses should take a stance on the fight against climate change

At least **3 in 5** people in each age segment think businesses should support Ukraine against the Russian invasion

Another topic that resonates across generations is that of improving women's role in society with around **two thirds** of each age group wanting businesses to take a stance

5

There is a clear disparity when it comes to the important values people hold and the reality of what matters most when buying products as, ultimately, price and quality are valued above all else when making purchasing decisions.

Each generation agrees on the top 3 traits that matter most when purchasing a product above all else:

#1 Having durable products (i.e., being the best value for money)

#2 Having the lowest price

#3 Other characteristics of a product such as quality and convenience

60%

of all ages on average, think businesses make too many empty promises about their commitments to social issues

Conclusion

A nation divided or an opportunity to raise the bar?

Right now much of what galvanises us as a nation, it seems, comes down to a handful of essential wants and needs. We want to live happy, fulfilling lives, be paid fairly and spend our working hours at companies that share our values, act like they care, and maybe throw in some perks to sweeten the impact of spending the vast majority of our time at their service. We want our politicians to be honourable, transparent, impactful. And we want them to act on what matters most: healthcare, the cost of living and the environment. We'd also quite like to better understand each other, old and young, to minimise conflict while still getting what we each need.

For brands and businesses, navigating the twisting path between working-age generations may feel like a minefield. So many different demands, priorities and conflicting applications of the soft power people now possess and aren't afraid to use. The challenge is not so much the lack of a roadmap, as the unexpected diversions that creep in along the way. From one generation to the next, straying from generalities into specifics can have dire consequences.

In some ways the extremes in opinion are hardly surprising. Our youngest cohort, the under 25s hold the highest and most radical expectations of businesses and politicians. They're a group which has come of age in the most populist political climate for decades. Most of them have only ever voted in a post-Brexit Britain, a decision they had no say on. The sources of information on politics and businesses for under 35s are also increasingly driven not by news organisations, but by algorithms. By favouring TikTok over the 6 o'clock news, younger people have freed themselves from the editorial control of traditional media outlets but are clearly falling into a new information bubble. One which gives the appearance of individual autonomy but is ultimately limited to the content targeted toward them.

The same goes for older generations, to whom house ownership is a near universal reality and whose opinions have been shaped by exponential changes in society, education, culture and technology over the last sixty years.

Yet what we thought we knew, and relied on, has been turned on its head. Our data reveals society appears to be staying liberal for longer. We see milk-pouring, road-blocking activists who are as likely to be pension-aged Baby Boomers as activist Gen-Zs. We believe this is because people's expectations have fundamentally changed. We are now determined to hold those in power to account, whether in the political sphere or the corporate world.

A blueprint for brands

Our worldview is now informed by so many different experiences, and while there are key variables with which to steer into the sight of different age groups, the overall picture is no longer quite so clear cut. Although there is evidence that each generation may be comfortable in its own echo chamber, brands that want to play it safe with their marketing and business strategies and cast their net wide, would do well to focus on fundamental truths such as increasing climate change and the rising cost of living, which speak to the concerns of both young and old.

However, when equipped with the knowledge that values are becoming ever more liberal, the question for brands, politicians and employers is whether they now have a duty to help support this transition.

As a strategy for growth and differentiation taking the role of maverick loner, hitching your aspirations to an outlying idea is risky, but also where the rewards may be greatest. Organisations which embrace this choice and take a bold position to cross the generational divide can be seen as trend-setters, not tone-deaf. Brands who decide to stay in their lane may face less resistance but could lose out over the coming decades if they fail to keep pace with the value shift.

Whatever decision organisations take in engaging each or all of the five generations coexisting in Britain today, they should be rooted in the insights we've revealed in this report.

Old stereotypes and outdated truths can longer be relied upon to target and plan communications. Organisations have to be prepared to think differently and respond to the nuances of each generation.

While Portland has presented this Generation A-Z, to communicate and engage successfully as an organisation in 2023 you need Portland's data led approach to help target and inform your plans to successfully resonate with your target audiences.

Whether you're looking to target hard-hitting campaigns, build momentum for policy change, or want to get to know what makes your workplace tick, Portland's exceptional research and communications teams have got the insights to help you change the game and unite, not divide, the generations.

Authors



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Senior Research and Strategy Consultant

Vilma is a senior mixed-methods researcher with experience in producing high quality research with insight-driven recommendations for a wide range of clients often operating in challenging and contested environments. With an MSc in Political Communications, and extensive experience of working in the market research sector in the UK and abroad, she provides specialist advice as the research lead for a multitude of clients at Portland.



Alexander Donaldson
Senior Communications and Public Affairs Consultant

Alex is an integrated Senior Consultant at Portland, working on communications, public affairs and health — having spent the earlier part of his career in government. He has worked across multiple civil service departments in media offices, strategic communications and external affairs roles including DHSC, BEIS, HMRC and HMT. He's delivered crisis communications as well as a range of public information campaigns.



Gabriel Milland
Partner, Research and Strategy

Gabriel leads Portland's research practice, helping clients gain actionable insights into opinion and their reputation among their most important audiences, stakeholders and the public at large. A former national newspaper political correspondent and communications lead at two major Whitehall departments, Gabriel also offers counsel to Portland clients on media, campaigning, government relations, and issues and crises.

Design



Vanessa Verron
Design Director

Vanessa is a Design Director with over 19 years' experience. From working for fully integrated communications agencies to PR firms, she has delivered award-winning digital campaigns for tech and law firms. Vanessa supports the creative team in delivering impactful solutions for various clients.



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Digital Design Consultant

Jack is a Design Consultant, supporting Portland's Creative team on internal communications campaigns, and helping brands and clients connect with a variety of audiences. Prior to joining Portland, he has extensive experience working for major global clients at a communications agency. Jack worked for Viacom, where he handled their tent-pole events, such as the EMA's and KCA's, as well as helped a variety of clients connect with audiences through TV channels and social media outlets.

Senior Counsel



Victoria Dean
Chief Executive Officer

Victoria is the CEO of the agency after working in-house at Google as the Global Public Policy Director. She is a career diplomat, having spent nearly two decades in the British Diplomatic Service, with roles in London, Paris, Brussels, Washington DC and the Easter and Caribbean, where she was High Commissioner until 2016. She has extensive experience in B2B communications, and has developed and led a wide range of campaigns in the UK and internationally, including for Heathrow Airport during the London 2012 Games.



George Pascoe-Watson
Chairman

George advises the leaders of some of Britain's biggest firms, charities and organisations on their corporate communications and government relations strategies. His work spans a huge range of sectors including FMCG, defence, banking, financial technology, retail, regulated utilities, transport, health and pharmaceuticals. George provides senior counsel to Portland clients, drawing from his background of 25 years as a journalist, including as the Political Editor of The Sun.



Victoria Wallin
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Victoria is a corporate communications expert with over 20 years' experience. From advising major pharmaceutical companies on ground-breaking campaigns to supporting FTSE listed financial firms to enhance their leadership positions, she helps clients achieve their commercial objectives, protect their operating environment and guard against reputational risk.



Louise Winmill
Managing Director, Corporate Communications

Louise specialises in bringing together corporate, financial, consumer and digital communications disciplines to protect and build reputations. She has worked in-house and agency-side, advising the CEOs and Boards of many of the world's most iconic brands on all aspects of their reputation.



Emma Dean
Managing Director, Policy and Public Affairs

Emma leads Portland's public affairs and policy team. She served the UK Government for three years as a Special Adviser working with the Chancellor of the Exchequer, the Prime Minister's Chief of Staff and Chancellor of the Duchy of Lancaster, and also two Health Secretaries. During this time Emma worked on the delivery of the National Cyber Security Strategy, the Covid-19 response, including the rollout of the vaccine programme, and devised and delivered the first Women's Health Strategy for England. Prior to government she advised tech, media and telecoms companies on issues relating to online harms, consumer protection and cyber security.



Justin Talbot
Director, Employee Communications

Justin specialises in employee engagement, internal communications and transformational change, bringing with him over 17 years in this field. His work has seen him deliver large-scale strategies for global companies and unionised organisations, for instance, dealing with sensitive communications around an office rationalisation programme. Most recently, Justin led on all of the senior leadership communications at M&S and was instrumental in helping them to launch their new company values.