



The Nation Station: A Day in The Life of a 16-24

December 2019

01

Introduction

What is the Nation Station?



- The Nation Station is a cost effective way to gain high value primary research by establishing partnerships with educational institutions in the Nations & Regions. In return for discussing opportunities at Channel 4, we're able to run focus groups as well as attend careers fair to recruit for our 4Youth community.
- Since the project's launch in May earlier this year, the Advertising Research and Development team have run a total of 11 focus groups with young people in Bristol, Leeds, Manchester and Stratford-Upon-Avon.

In the last 6 months, we visited Manchester Metropolitan University and the University of Leeds...

5 FOCUS GROUPS & 37 STUDENTS



**Manchester
Metropolitan
University**



UNIVERSITY OF LEEDS

Methodology & Sample

- This report is based on data collected across 5 different focus groups to give in-depth qualitative insights and is also supported by desk research to give a quantitative overview too.
- In June 2019, we ran two focus groups with 16 students from Manchester Metropolitan University asking them all about their shopping habits and relationships with brands.
- We then visited Leeds University in October 2019, running a further 3 focus groups with 21 students from Leeds.
 - 1st focus group = students from Woodkirk Academy Sixth Form.
 - 2nd focus group = students from Leeds University living with friends.
 - 3rd Focus group = students from Leeds University that were living with family.

02

**What young people
are up to**

What young people get up to differs by their life stage & living arrangements...



SOCIAL & CHILL:

Students at Sixth Form

For those at Sixth Form, their hobbies tended to revolve around **group activities** (e.g. football and shopping). However, they also valued spending **quality time alone**. Some described how they like to **watch TV** in their spare time or the perks of **shopping online** in the comforts of their own home.

MATE DATES:

Students at Uni living with friends

For those living with friends at Uni, their hobbies revolved around the importance of **community** and **social gatherings**. For example, they mentioned going to the **pub with friends**, **cooking as a group** and the experience of **watching TV collectively**.

SELF-CARE:

Students at Uni living with family

Many of those living with family, find themselves juggling to find time to study as well as working part time. When they described what they get up to, it revolved a lot around '**self-care**' and **relaxing**. This involved **sleeping**, **going for walks** outside and **watching TV** as a form of escapism.

For young people, shopping was the most frequently mentioned activity they do in their spare time

For the young people we spoke to, shopping was perceived as a popular past time by many. The majority of the groups spoke about how they enjoyed shopping online and the convenience of shopping in their own home. However, others spoke about how they enjoyed the social element of going out as a group and shopping together.



* **43%**

of 16-24's prefer to buy their clothes online vs. just 31% who prefer shopping in-store.

VIDEO CLICK HERE

HOBBIES: SHOPPING

PART 1: Online shopping



03

Let's get topical:
THREE key areas
young people are
discussing

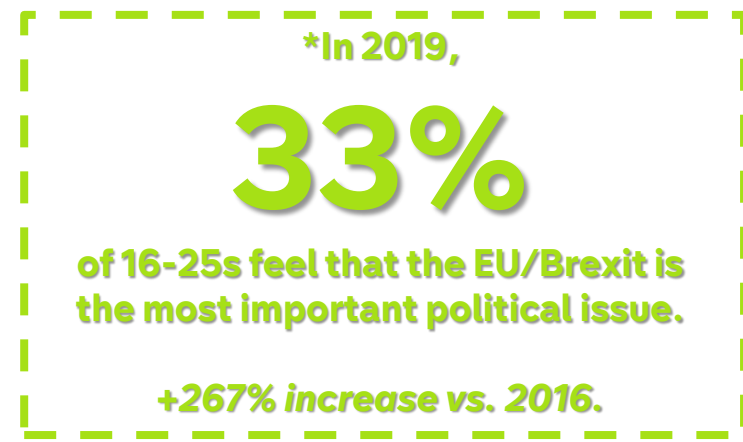
1. Politics & BREXIT:

Amongst the University focus groups, politics and Brexit was the most frequently discussed topic for the students. For most it was hard to not pay attention to the area as they referred to it being spoken about often with friends, seeing it on the news and even learning about it in lessons. Although for others, they did mention how they were starting to shy away from discussing Brexit and 'pretend it's not happening' at times. Interestingly, whilst the younger students (Sixth Formers) were aware of Brexit they found it harder to articulate exactly what the impact of this was, with some claiming they didn't entirely understand what was happening. In fact, they spoke about Brexit in a more comical manner compared to the other groups.

"Stuff like Boris Johnson and Donald Trump, looking at what they're doing and how that affects our society"
(F, Uni: Living with Friends)

"We've been talking about Brexit, we've been doing it in English...And I still have no clue what it is, but it's got something to do with Boris Johnson"
(F, Sixth Form)

"We're talking about Brexit a lot, if it's in the news we talk about it, but if it's not we don't completely talk about it... if nothings going on, we pretend it's not happening"
(Living in University Halls)



*Environmental issues are the

MOST

important issue for 16-25s, with over half agreeing that it is the most important political issue to them

2. The Environment & Climate Change

This emerged as a very important and topical issue that came up frequently throughout the five focus groups. For our University-aged students, they often spoke about how they can collectively make a change. Often they hypothesised with friends about what their impact could be on the wider issues, and the impact on their future. The majority spoke about Greta Thunberg and the Extinction Rebellion protests. Whilst they weren't necessarily taking part in the protests themselves, they were actively looking at ways to contribute e.g. using less plastic/recycling more. For our youngest group (Sixth Formers), they were aware of issues surrounding the environment and climate change but only from discussion amongst peers at Sixth Form – they were less likely to bring up the topic themselves or proactively make changes to their lifestyle in support of the issues.



"We've been talking about climate change and sustainability just like things we can do to make a difference...Greta Thunberg sparked us"
(F, Uni: Living with Friends)

"I was literally this morning having a discussion about extinction rebellion, and like are they going about it the right way? Are they being a bit extreme?"
(F, Uni: Living with Family)

"We always have a debate on whether it's good to do little gestures or not"
(M, Uni: Living with Friends)

*16-24s are...

77% more likely

to agree

"I like to keep up with the latest fashions"

Me trying to fit in



3. Fads & Fitting In

The conversations that younger students claimed to have with friends centred more around trends in video content and apps that they're using, as opposed to political-driven discussions. For example, it was common to speak with their friends about controversial vloggers that were topical and particularly resonated with them. They also liked to be part of the hype of popular trends, such as downloading the Mario Kart app as this is what their friends were talking about.

Amongst all the groups being able to have common ground with peers was hugely important. For example, the University students spoke about the pressures of deadlines during their course and other topics their peers could also relate to. Whereas, the Sixth Form groups spoke less about their studies and more about their media consumption habits – particularly around video content and apps.

*"Mario Kart, everyone seems to be playing it on their mobile phones"
(F, Uni: Living with Friends)*

*"Shane Dawson series on YouTube...He does them really well so everyone's just on it...We're used to seeing YouTubers as....always nice and kind...not as they have a trauma, they have a past, they are actually people"
(F, Sixth Form)*

*"Discussing future opportunities, like where are we going with this?"
(M, Uni: Living with Family)*

04

4 ALL
THE UK



There were 3 key themes that emerged when young people spoke about Channel 4 coming to Leeds...



(Leeds focus groups took place on 8th October 19 – one week before the Leeds office opened!)
All students in the **Leeds focus groups** were aware that Channel 4 was coming to Leeds through **word of mouth**, following **the news**, **social media** and even learning about it through **lessons/lectures**.

C4 BRAND
IMAGE

1. They perceived Channel 4's brand image to be more liberal, progressive, diverse and a place full of equal opportunities. They spoke about how they'd be more likely to watch Channel 4 as a result.

"(Channel 4) I think it has the reputation of being quite inclusive... it gives you the impression of being liberal and wanting to move things forward" (M, Uni: Living with Friends)

MAKING A
STATEMENT

2. They praised Channel 4 for what the strategy stood for. They loved that it made a statement by coming out of London.

"It'll show there's more to Britain than just London, cause quite a lot of the news is from London...I feel it's going to bring a diversity" (F, Uni: Living with Family)

PROUD OF
LEEDS

3. It made them feel a sense of pride to be in Leeds and excitement about future prospects and opportunities there. They also felt Channel 4 and Leeds were the perfect fit too.

"(Channel 4) Coming to Leeds makes us feel prouder of where we live" (F, Sixth Form)



They did feel it's important that they notice a difference on screen from Channel 4 coming to Leeds e.g. regional presenters/range of locations/different content.

In their opinion, Channel 4 coming to Leeds makes a statement & will encourage more diverse representation

"I've been following it, it's a Guardian article on my Facebook feed"
(M, Uni: Living with Friends)

"Me and my mum watch it (Channel 4) all the time, so we just sorta knew about it"
(F, Sixth Form)

"I think being interested in the media and being located in the north can be really frustrating. The idea that everything's in London, and I think if you had more northern people behind the scenes, you'd get more accurate representation"
(F, Uni: Living with Family)



"The statement is the biggest as it is all London centric"
(M, Uni: Living with Friends)

"It feels like something everyone's talking about because usually companies are based in London... it's shocking to people"
(F, Sixth Form)

"Leeds doesn't get enough credit, it's a really cool City"
(F, Uni: Living with Friends)

"It's a statement moving outside of London, making that choice"
(M, Uni: Living with Friends)

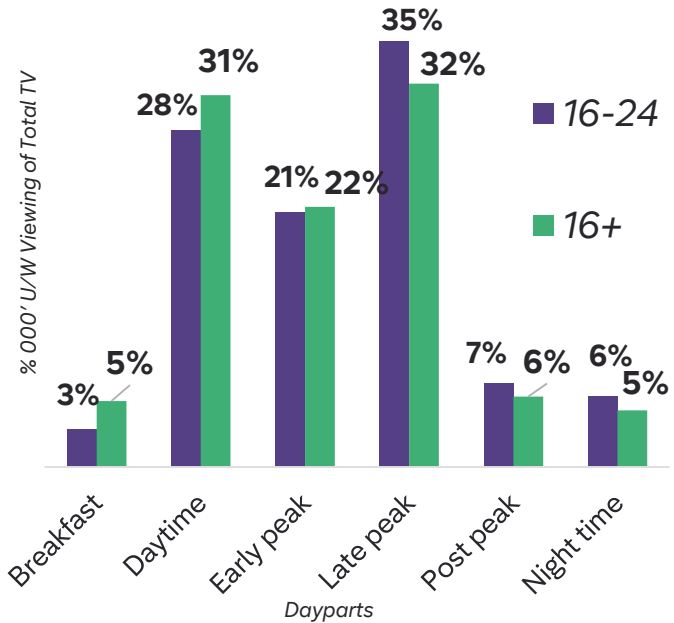
05

How TV fits into
student's lifestyles

*In the last year to date (Nov 18 – Oct 19), the largest volume of Total TV viewing for young people takes place in the evening

63%

of 16-24s viewing is in the peak dayparts



When do they watch content?

The majority of students have to fit watching content in and around Sixth Form and University – meaning most tended to gravitate towards watching TV in the evenings and on weekends. Many mentioned having a routine in when and what they watch. For the students, the time of the day they were watching had an impact on the type of content they were watching. For example, in the mornings they tended to watch vloggers as the content was inspirational. Whereas, in the evenings they wanted content they could unwind to and that offers a form of escapism.

"It depends on what video content it is...more entertainment stuff for the night time but say like for the morning, I like watching vlogs because it makes me feel like ready to be proactive"
 (F, Uni: Living with Friends)

"I always watch everything before I sleep as I don't find time during the day. So it's kind of like my thing at the end of the day, once I've done all my work I can relax and watch whatever I wanna watch"
 (F, Uni: Living with Family)

"(Discussing weekend viewing) In the mornings...as soon as you get up, you'll sit in front of the TV and have breakfast and then in the evenings as well maybe after 6PM, get all your homework done and then watch TV"
 (F, Sixth Form)

The 3 KEY DRAWS of Live TV

EASE:



With some of the students working alongside studying, they really appreciated the ease that live TV offers – the ability to be able to have something pre-selected for them to watch. A few spoke about how they can spend long periods of time scrolling through other video platforms like Netflix, YouTube and Facebook and not find the quality of content they were hoping for.

“Saturday evening maybe.... Something easy to watch and not too challenging” (F, Uni: Living with Family)

“Whenever I come home, like Four in the Bed’s on and that’s the only thing I stick on, because everyone annoys me on YouTube and on Netflix you take ages to scroll down to fit what you want to watch and it just gets boring” (F, Sixth Form)

COMMUNAL VIEWING:



For many in the student community, the appeal of live TV was often the communal feeling it gave. Feeling like a part of the live viewing experience gave lots of benefits. For example, a few people suggested how live TV brought them closer to family members as they’d have a certain programme they’d watch together.

“Me and my mum watch two different series...Sometimes at home I feel like I’m in my room all the time, just like ignoring everyone. So it’s nice to go downstairs and have family time” (F, Sixth Form)

“When you’re with your housemates and it’s something big, like I’m a Celeb....” (M, Uni: Living with Friends)

UNMISSABLE CONTENT:



There was often live content they watched with friends because they didn’t want any spoilers and wanted to feel part of the wider viewing experience. Interestingly, this was dependent on what the content was: sporting events, documentaries, dramas, game shows and premium TV shows e.g. Game of Thrones, were all mentioned as content that they couldn’t help but watch live.

“Game shows are big, and also I’d say if it’s like a massive drama like peaky blinders” (M, Uni: Living with Friends)

“If there’s like a premium TV show like Game of Thrones, I’ll watch it live because I don’t want spoilers” (M, Uni: Living with Friends)

VIDEO CLICK HERE

LIVE TV

PART 1: Bringing people together





On demand viewing = fitting around you

For the majority, on-demand viewing was a great way for them to keep up-to-date with programmes whilst fitting it around their studies. It meant that they could still watch the shows they wanted, when they wanted to. Almost everyone in the focus groups admitted to using on-demand services everyday, showing how ingrained streaming services are as part of their daily routine. There was a theme that young people are often using on demand viewing as a treat – once they've finished work or studying they would reward themselves with on demand content.

"At the moment we're using All 4 to watch The Circle because it's on too late so we have to watch it afterwards, we watch one or two shows as a house" (F, Uni: Living with Friends)

"I sometimes don't have a choice, because I'm into rugby and it's the world cup now but my mum loves to watch her TV so I have to record it and watch it when she's not in" (F, Uni: Living with Family)

*"It's like a reward, you work towards it. I use it as a motivator- get work done, watch TV"
(F, Uni: Living with Family)*

Students enjoyed using All 4 because of its variety & diversity



VARIETY:

This was the main element which stood out for young people. They often spoke about how eclectic All 4 was vs. the likes of other broadcaster VODs. They liked that All 4 didn't restrict them to certain categories and felt that there was something for everyone on broadcaster VOD. In fact, in some cases the students had gone on All 4 to watch a certain programme, and once the show had finished they'd been introduced to another show. Comedy was the main category young people were using All 4 to watch, however, they also mentioned watching dramas, Sci-Fi, documentaries and entertainment shows like The Circle.

"I feel like things like ITV they literally only have a certain type of programme or series whereas All 4 you can have like some funny shows and some proper dramas which I like" (F, Sixth Form)

"I always find you can go onto All 4 and find something casual to put on for the house...like when I go on iPlayer, it's more drama or sport but it's not eclectic" (M, Uni: Living with Friends)

"If I've finished watching Friday Night Dinner I'll just scroll through like the comedy section and then the horror section, if I see something I've not seen before" (M, Sixth Form)

DIVERSE & INCLUSIVE:

Some of the students spoke about how they perceived the All 4 brand to be different and diverse. Speaking about how All 4 offers a different viewpoint compared to other broadcaster VODs and therefore appeals to everyone. This then led some to speak about how they often liked to watch show's on All 4 communally with their housemates, which was often because of All 4's well-known, varied content and the talkability of All 4's programming too.

"It depends on my mood, usually comedy but I do also love like documentaries that are kinda shocking and Channel 4 are obviously great for that, when we watch documentaries it's more of a house thing cause you can all just sit there and be like oh my god" (F, Uni: Living with Friends)

"Different...I feel like Channel 4 covers stuff that other broadcasters won't, like the Tez O'Clock show. On BBC it tends to always be white males who are always leading it, so I've never seen an ethnic minority lead a comedy show like that" (F, Uni: Living with Family)

"Diverse I would say...like there's a lot more content towards black and ethnic communities but also white as well so it gives you a diverse range of different characters... there's also original stories shown on Channel 4 compared to other channels" (F, Uni: Living with Family)

VIDEO CLICK HERE

ON DEMAND VIEWING

PART 1: How they're consuming video content



TV advertising is high quality and engages young people....

1.

Why TV advertising stands out:

For young people, they feel TV adverts are of higher quality than adverts they see elsewhere. TV adverts had a cinematic experience which made viewers more engaged with the products. On different occasions young people spoke about how they had gone on to look at a product or even purchased it as a result. Often, key categories were mentioned as being well-suited to the TV platform such as food, healthy, beauty and technology.

"It's more interactive on TV, whereas on Instagram it's just a picture" (F, Manchester Uni, Living with Family)

"I got my phone cause I saw an advert and I was like I want that phone" (F, Manchester Uni, Living with Family)

What works with TV advertising:

Young people praised TV advertising in comparison to other media channels, and described what made it so successful. They liked an advert that told a story and had an emotional impact as it helped them engage with the brand. To add to this, when speaking about memorable adverts they often mentioned music, a voice over and humour which made them more distinctive.

"I think it's adverts which you don't recognise as an advert like you see it... and it turns out to be a story and you stay to watch what it is...Like Christmas John Lewis adverts, you look forward to Christmas to see what they're going to be" (F, Manchester Uni, Living with Family)

"The meerkat ones are cute...you just remember it, it's the voice and the accent" (F, Manchester Uni, Living with Family)

16-24s are...

***77% more
likely**

to agree

**"Whilst watching TV, I often
search for the products I see
advertised"**



Source: GB TGI 2019 Q4 (July 2018 – June 2019), base = 16+, Leeds University/Leeds Sixth Form Focus Groups = 21 students & Manchester Metropolitan University Focus groups = 16 students.

06

**Young people
& engaging
with brands**

Fashion & technology brands

stand out to young people

TOP MENTIONED BRANDS THEY FEEL CONNECTED TO



NEW LOOK

ASOS
discover fashion online

adidas

boohoo

NETFLIX

CONVERSE®

Apple

H&M

MAC

Nike

What connecting to brands means to young people

For young people, **affordability** was one of the most important factors when considering a brand. Another very important factor was brands that are able to develop a **sense of identity** which closely relates to them.

Young people were often divided in how much a **brand's popularity** translated into their **loyalty** to a brand - for some it was essential to their purchase, whilst for others they liked **unique brands** that made them stand out. Both mixed opinions reflect how brands help to form part of a young person's **identity**.

It was also important for young people to feel a **sense of belonging** to a brand's broader community, as if they were contributing to a **wider societal change**.

For a few, other factors such as a **brand's values** and how diverse they were also played into how they perceived the brand's image.



*"I think a lot of them try and make you feel really included and a part of it...Like you feel like a sense of belonging...they make you feel like you've got an active role and you're not just a customer"
(F, Manchester Uni, Living with Family)*

VIDEO CLICK HERE

RELATIONSHIP WITH BRANDS

PART 1: Brands & their identity





Thank you!

For more information please contact
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