

The

7 upper

third

TV audiences, and
what it means to be
'not young' today

GREAT!

Foreword

We love our audience

And we're proud to curate the Great! network so that it celebrates the programming our audience wants, just how they want it. From 50s Westerns, 60s Carry Ons, 70s comedy classics and 80s dramas – right through to the latest action blockbusters, whodunnits and Hallmark-esque romances. That's a broad list of content, because it's a broad group of people we serve.

Generally, we lean into what we call 'the upper third', i.e. older individuals. Not always (when you put The Bourne Identity on a free-to-air channel at 9pm on a Friday, that's a universal crowd pleaser!) but mostly. And when we talked to our older audience, we heard a consistent story: that they don't feel seen by society, and they don't feel represented by much of what's on TV.

That's why we've put together this report. To shine a brighter, kinder light on our audience. We've focused a lot of attention on people over 55, in part because that's the media segmentation that's commonly used: '55+'. And that single category represents a lot of very different people at very different stages of life.

So we're bringing new insights from new angles, and updating the nation's thinking on what it means to be 'not young' in the UK today.

And we're finding that in 2025 there remain some major misconceptions around age. That the dominant and emerging trends of how older people are talked about and portrayed onscreen show evolution and progress, but still fail to be inclusive.

And that there are an awful lot of things in life and TV that unite everyone, no matter what the age bracket.

We love our audience. And this report's for them.

Kate, from Great! x



Highlights

A massive market

People aged 55+ make up around a third (32%) of the UK population – a diverse audience worth serving well

Ageing with optimism

53% of men aged 65–74 feel physically well enough to enjoy life to the fullest, and three-quarters of people 65–74 and 75+ say they feel younger than their age

Loneliness falls sharply with age

Experienced loneliness lessens from 43% (men) and 49% (women) at 18–24 to 16% and 32% of all 75+

Tech-confident seniors

81% of men and 69% of women aged 65–74 feel confident with most technology; even at 75+, a majority say tech has made life better, and a third use video calls to keep in touch

Left behind

Over a quarter (26%) of over 55s feel left behind by modern TV

Representation problem

Just 15% of the entire over 55 audience feel accurately and positively represented by what they see on TV

Broadcast still brilliant

93% of people 55+ watch Broadcast TV weekly, and 59% of 65–74s watch daily, because it's free, and login-free

Real viewing joy

76% of men and 71% of women over 65 say they get a lot of pleasure from TV

Companionship matters

40% of all viewers say TV keeps them company, rising to 49% for women 75+, reflecting the supportive role TV plays in later life

Nostalgia unites everyone

Two-thirds (67%) of all audiences enjoy nostalgia TV, and it's strongest among older viewers, making classic favourites a powerful cross-generational draw

Later life is social and purposeful

Volunteering surges at 75+, while 65–74 men are the most likely of any cohort to regularly go to the pub

Not one group

Our older-audience archetypes – VIBEs, NESTs, LIFTs and LINKs – show real diversity, reminding us all that 55+ spans distinct needs and mindsets

Who we surveyed

2,092 people from across the UK, representing age groups from 18–24 through to 75+, in July 2025, through RED C Research. <https://redcresearch.com/>

RED C's research was supported by semiotics research led by David Panos of Year Zero. <http://www.year-zero.com/fullsite.php>

Additional research of TV viewers aged 55 and over was undertaken by Great! in August 2025

The upper third

32%

of the UK population are 55 or over.

That's approximately 22 million people, and the group breakdown is roughly like this:

8.8 million

AGED 55–64, 51% WOMEN

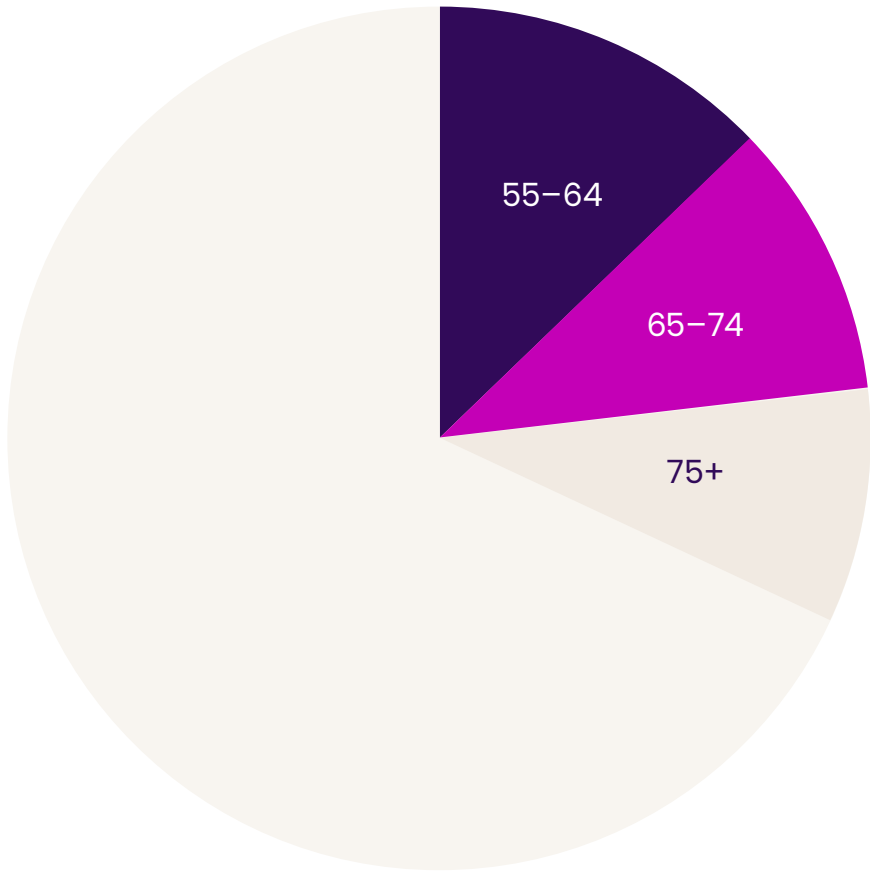
7.1 million

AGED 65–74, 52% WOMEN

6.0 million

AGED 75+, 57% WOMEN

<https://www.ons.gov.uk>



A quick look at these groups highlights some fundamental lifestyle differences

WORK

62%

of men are still working and 56% for women aged 55–64

22%

of men are still working and 17% for women aged 65–74

2%

of men are still working and 3% for women aged 75+

HOME

66%

of 75+ men are living with a partner; for women in the same bracket, it's 42%

11%

of 75+ men are widowed; for women, it's three times that at 32%

14%

of men aged 55–64 are widowed, separated or divorced; that nearly doubles (to 27%) at 65–74

Life situations vary, and so does the way in which our audiences choose to spend their free time

Some hobbies are exactly what you might expect, like gardening. And some, like the priority we give to socialising at different life stages, are not. More than anything, we see a wide range of interests, regardless of age – because this is a wide range of people.

The social smile

Popularity of socialising creates a smile-like curve. Popularity of socialising peaks at our youngest and oldest age groups

Reading more with time

Preference for reading increases with age

The gardening spike

Sudden spike in popularity for gardening at 55-64

Time to give back

Surge in volunteering for both men and women at 75+

Arts & Crafts for life

Popularity of crafting doesn't change over time – if you love it at 18-24, you still love it at 75+

Down the pub, and when to call time

Men aged 65-74 are most likely of any cohort to regularly go to the pub, but there's a significant drop-off at 75+

Attitudes to health shift significantly over time

It's amazing what a positive outlook can do for you. It's something we hear from our audience when we speak to them, and it's backed up by our findings in this report. More often than not, they've been through a lot and life isn't perfect. But they keep going, keep finding the positive, keep smiling and enjoying the life around them.

All groups over 55 felt more positive than younger people. More than half (53%) of 65-74 year old men said they feel physically well enough to enjoy life to the fullest – that's the most positive group. Just 29% of women aged 25-34 felt that way.

Backed up by that, 75% of men and women aged 65-74 and 75+ say they feel younger than their age, versus just over half (54%) of people aged 18-24.

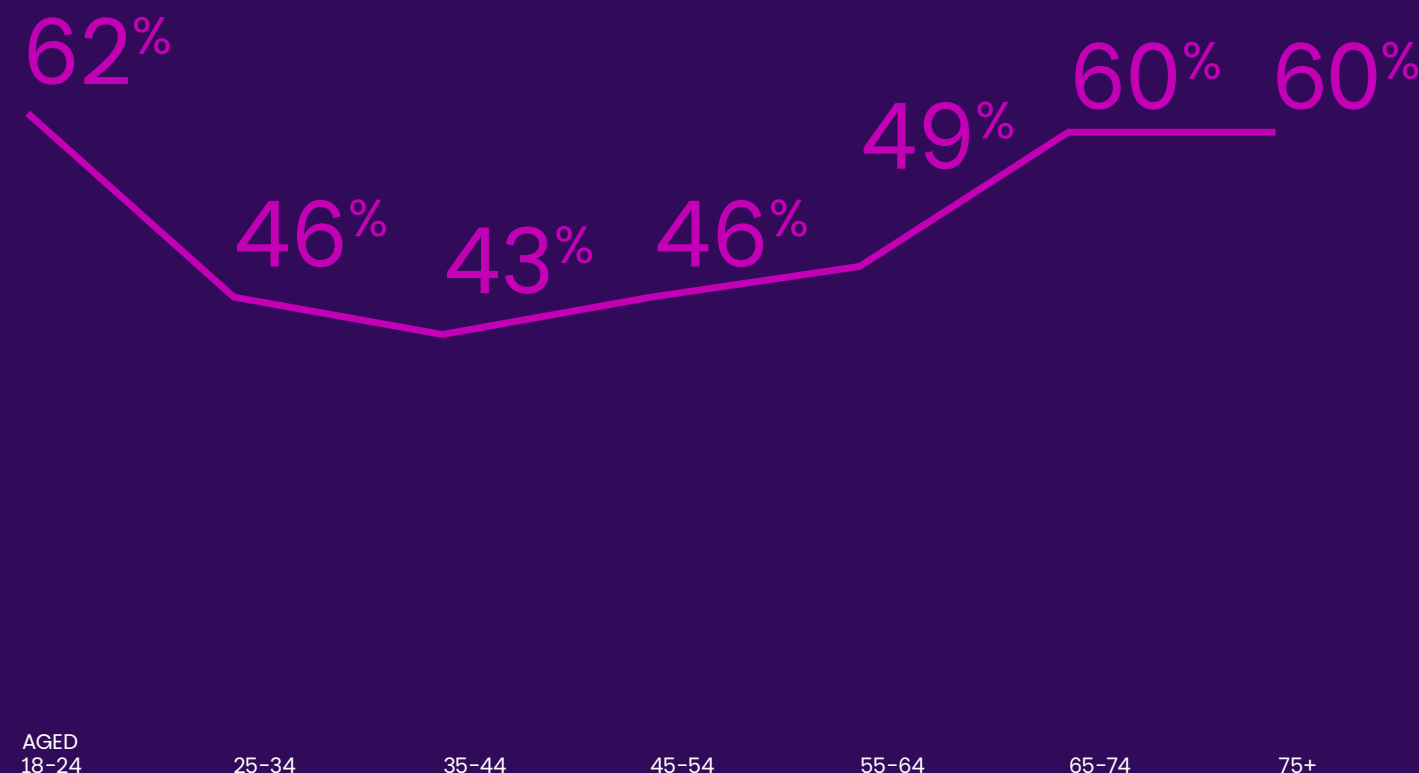
And because they feel younger, they want to hang out with younger people. Mixing with other age groups becomes more favourable with time.

Our study suggests that loneliness declines with age. 43% of men and 49% of women aged 18-24 report often feeling lonely, but that drops to 16% and 32% for 75+. Some of that's down to different generations' attitudes, but it's also a reminder that we should all take the time to remember that young people have struggles too, and we need to look out for everyone.

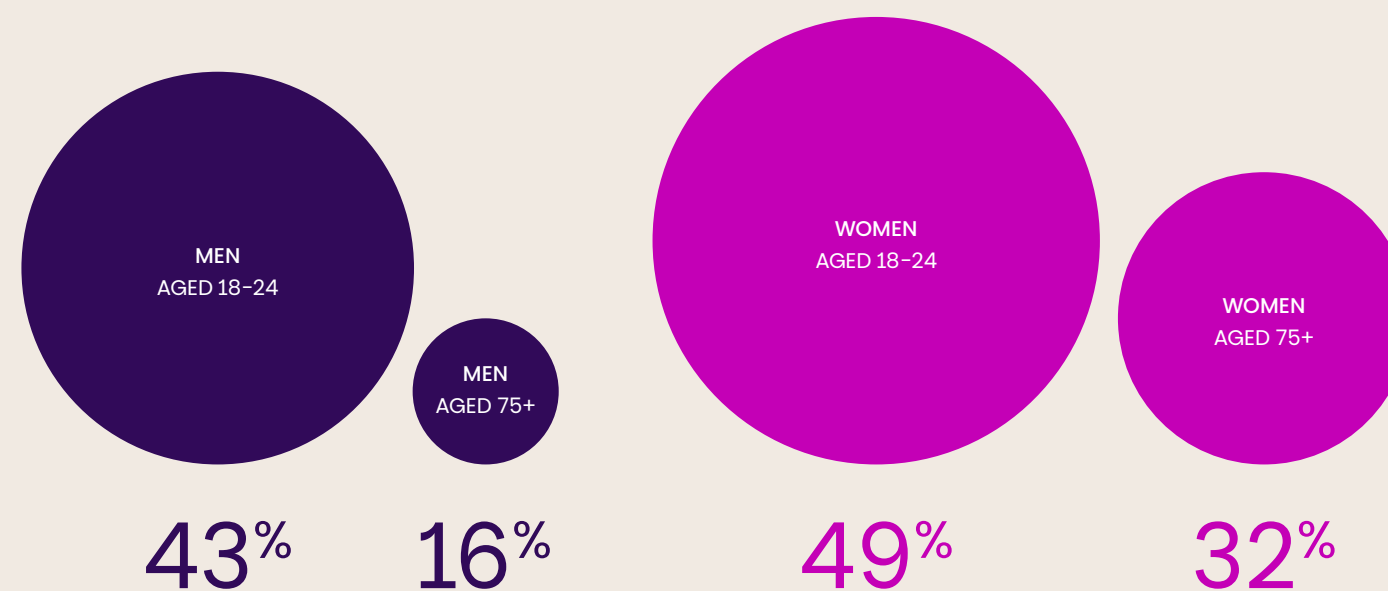
53%

of 65-74 year old men said they feel physically well enough to enjoy life to the fullest.

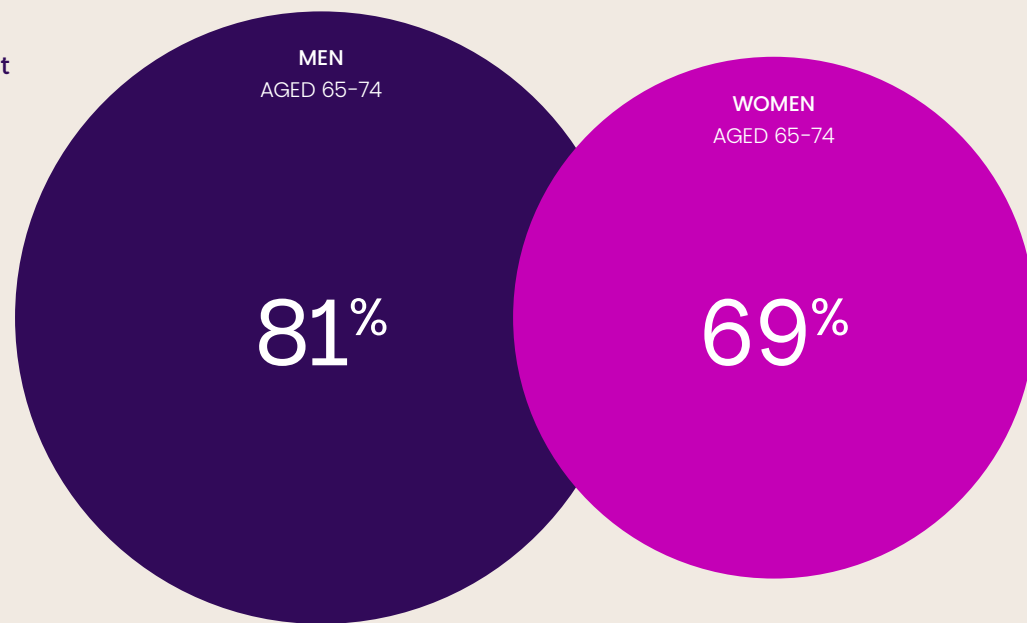
The social smile



Loneliness declines with age



Percentage that feel confident
with most technology



Free service appeals to all ages



MEN
AGED 25-34

30%

Technology is becoming more and more prominent in our lives

Whether we like it or not, and whether we understand it or not, technology is everywhere.

One finding we're proud to have identified when talking to upper third individuals, is that tech savviness isn't a barrier for them.

81% of men and 69% of women aged 65-74 say they feel confident with most technology.

61% of men and 51% of women aged 75+ say that technology has made their life better.

Using video calls to keep in touch with friends and family is most popular for 18-24 year olds (64%), but a third (32%) of 75+ people are embracing it too.

But whatever the upside of technology, and however pervasive at all ages, a significant amount of people, across all age groups, don't like the pressure to be online for everything.

According to Barb data, 93% of people over the age of 55 watch Broadcast TV every week

Our report finds that 59% of people aged 66-74 watch Broadcast TV every day; whereas only 10% watch a paid streaming service (e.g. Netflix) and 9% watch a free streaming service (e.g. YouTube.)

And what is it about Broadcast TV that people like?

Overwhelmingly, money talks. And the free service appeals at a time when so much content requires a subscription and a monthly fee. But it does vary with age:

- 64% of men aged 55-64 called out the free service as the thing they liked most about Broadcast TV – not surprising given they grew up and spent most of their adult life with free terrestrial content
- At the other end of the spectrum, only 30% of men aged 25-34 really valued 'free' – also no surprise given the prevalence of paid for services that they're used to
- Women were more consistently price-conscious across all ages, but 55-64 was also the age group that valued no fee the most

Continuing the theme of people resenting having to be online for everything, no logins was another prominent reason for liking Broadcast TV – peaking at 40% for men aged 55-64.

And large numbers across all age groups felt that remembering passwords was impossible. We couldn't agree more (and that's why the Great! player needs no account or password!)

Broadcast TV viewers also enjoyed not being overwhelmed by choice – surprisingly identified more by younger generations, with 15% of 18-24 year old men calling that out.

And when people are watching Broadcast TV, routine is an important reason cited by 35% of all 65-74 year olds – but routine is consistently valuable across all age groups.

27% of women aged 18-24 enjoy watching live Broadcast TV with others, showing the power of gathering around specific moments, even for younger viewers.

MALE, 55-64

“ It's free — and that's a
massive one these days.”

Audiences are enjoying TV (especially nostalgia TV) – it’s giving them pleasure and keeping them company

First up, we want to be entertained by TV. But does it cater to every age group and appeal to their preferences? It’s not an easy task, but it’s absolutely what we should be aspiring to achieve.

Half (50%) of women aged 18–24 feel it does, but that number drops to just over a quarter (27%) for women aged 65–74, and down to 22% for 75+.

Similarly for men, 47% aged 25–34 say TV caters for them, but that declines down to 29% between 65 and 74, and to 23% for 75+.

Over a quarter (26%) of those over 55 feel left behind by the way modern TV is made and broadcast today. This increases with age, and men consistently feel more left behind than women.

That reflects the reality that most programming is designed for younger audiences.

But do we get pleasure from watching TV?

Short answer: yes! There are shortcomings in representation and targeting but, overall, TV is doing a good job.

Three quarters (76%) of men and 71% of women aged over 65 all say they get a lot of pleasure from watching TV. And it’s working for younger audiences too, with 61% of men and 57% of women aged 18–24 enjoying TV.

Premieres, new seasons and network exclusives get all the marketing attention and are used to drive viewer numbers, but what kind of TV do people actually enjoy?

Two thirds (67%) of people enjoy nostalgia TV, re-watching TV programmes from the past.

That peaks at 76% for men aged 55–64.

It’s an important reminder of where people find comfort amongst all the noise – TV and movies that are familiar and can be enjoyed without the pressure of being up to date with the latest thing.

Our report (and talking to our audience) found that TV can do another job as well as entertain: it can also be a companion at home. 40% of all audiences say TV keeps them company, rising to a half (49%) for women aged 75+.

Looking back at data on just how many people live alone – either by choice or circumstance – being good company is an important job, and that just highlights that it has to be done right.

MALE, 65–74

“I know it word for word... it’s comforting.”

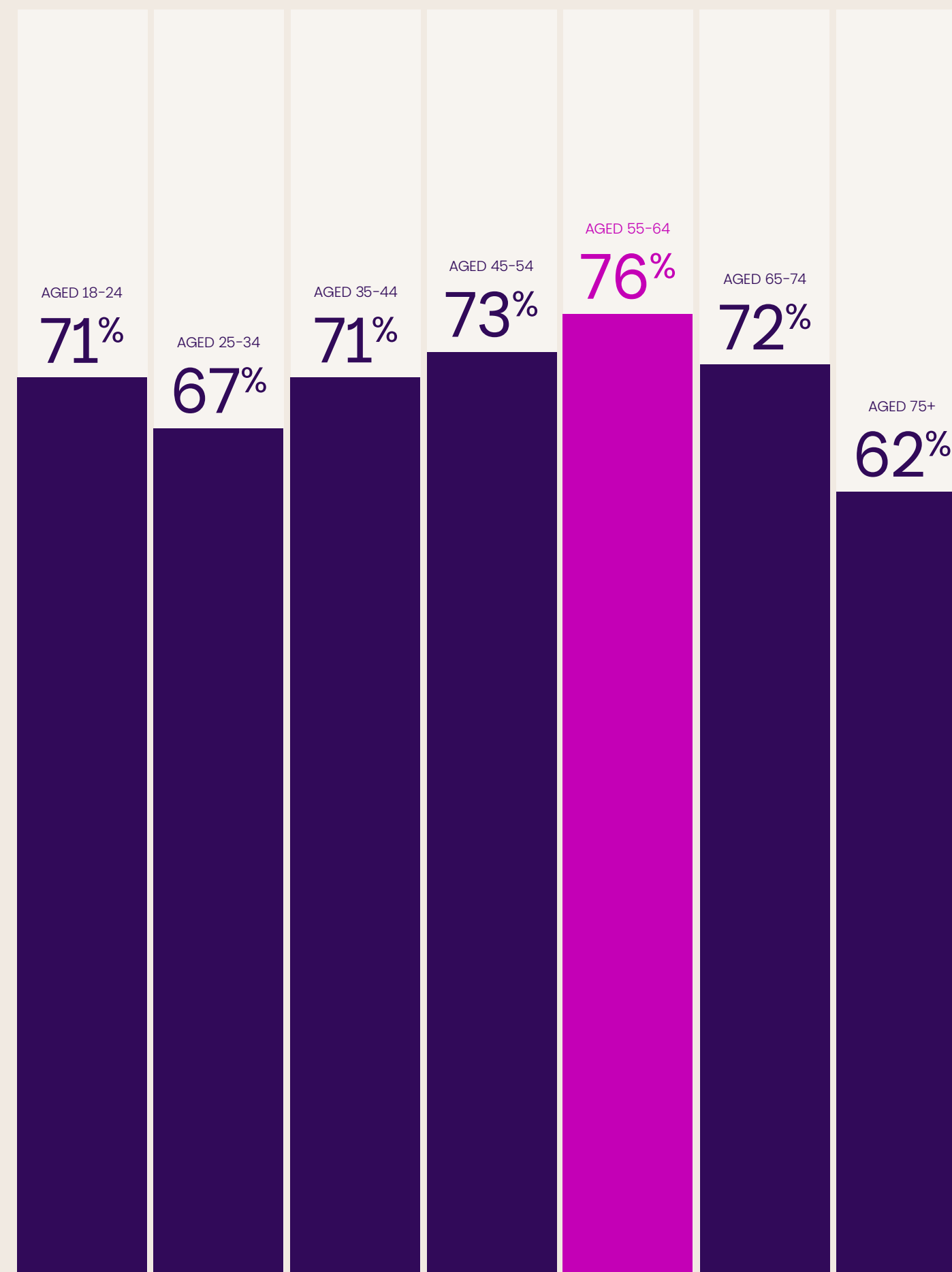
MALE, 65–74

“My house is quiet. My wife died two years ago. Sometimes I put the TV on just to make a noise. The dog enjoys it.”

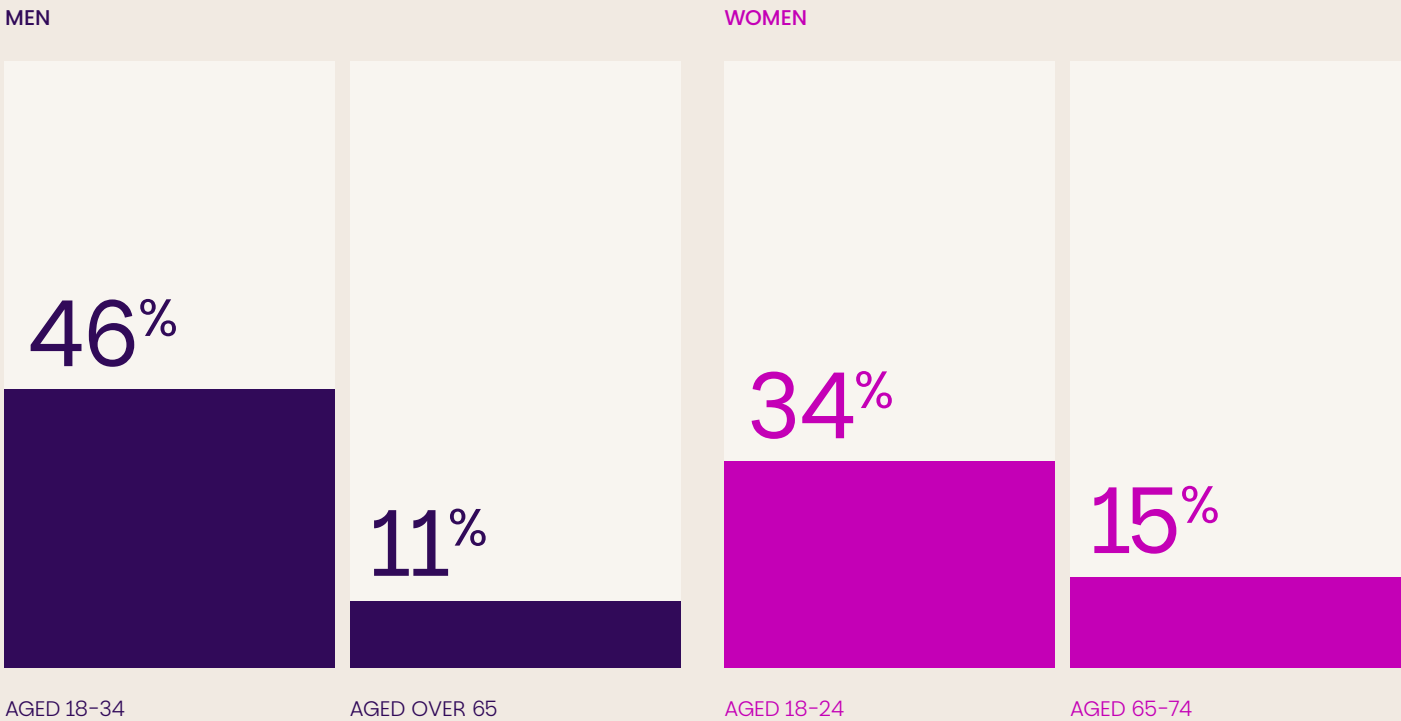
40%

of all audiences say TV keeps them company.

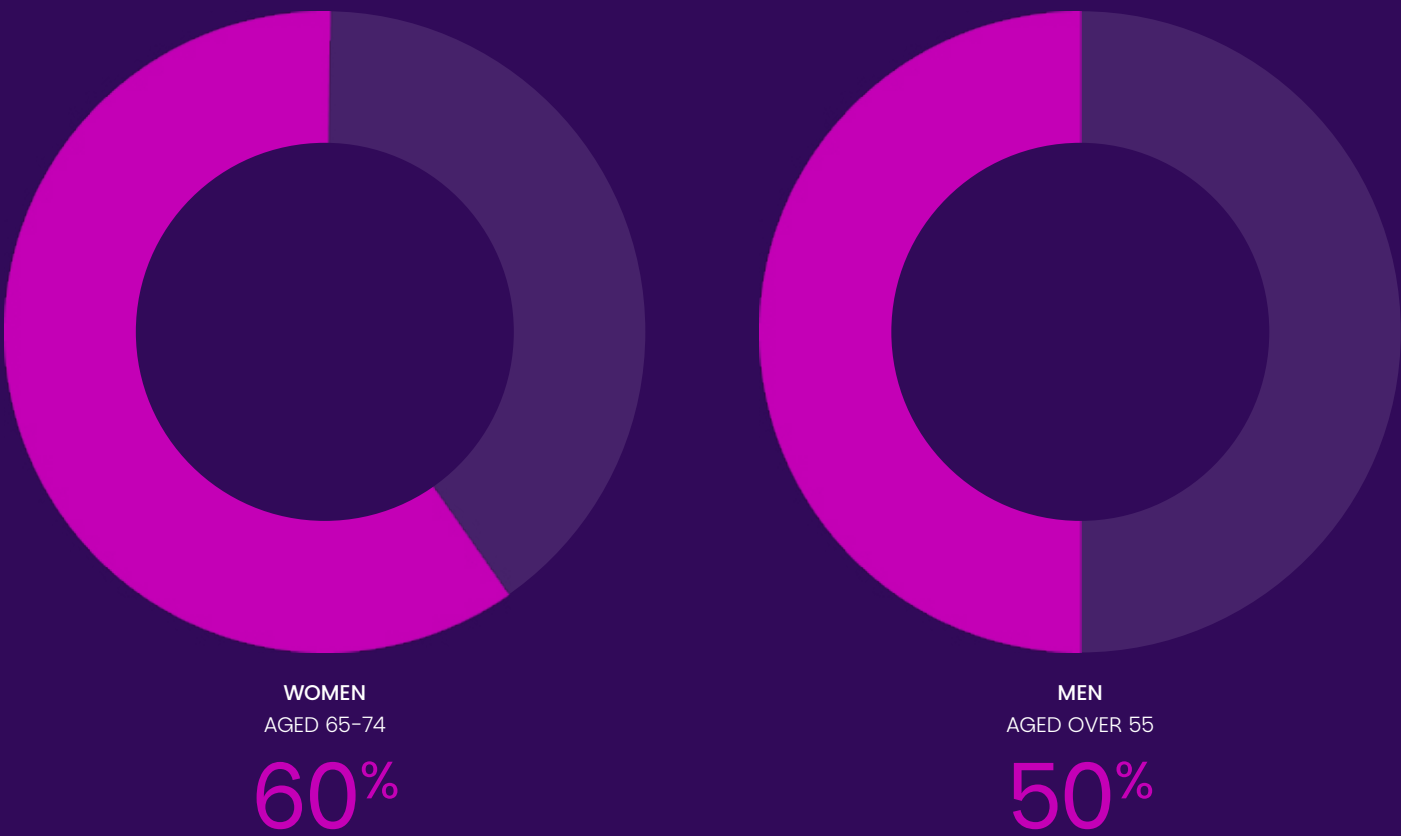
Percentage of people enjoying nostalgia TV, re-watching TV programmes from the past



Percentage of people that feel positively represented onscreen



Percentage that say they don't see people like them in advertising



Representation matters

Representation is also an important part of doing TV right for every audience. Does TV do a good job of holding a mirror up to the breadth of its audiences?

46% of men aged 18-34 feel positively represented, versus just 11% of men aged over 65. Just over a third (34%) of women aged 18-24 feel positively represented, but that drops to just below a quarter then declines down to 15% for 65-74 year olds, and 11% for 75+.

47% of men aged 18-34 feel they are accurately represented.

That figure is just 12% for women aged 65-74. Fewer than a third of all women in all age groups felt accurately represented, and for both men and women, representation largely declines with age.

It's another reminder that TV is too often being created and curated for younger audiences, and it's missing the mark.

It's also valuable to understand if people think they're represented positively online – and the response from audiences is very similar.

The pattern is clear.

The advertising that we see plays a major part in how we feel. And brands want our money, so they should make an effort to appeal to us, right?

Apparently not.

60% of women aged 65-74 say they don't see people like them in advertising, and half (50%) of all men aged over 55 feel the same way.

It's clear that the older generations do not feel represented by advertising. But when they are present, how are they portrayed?

Across all groups, 57% feel that advertising uses lazy stereotypes to represent older people, with 78% of women aged 65-74 and 73% of men over 75 agreeing.

The net effect of this is that older people rarely see someone their age on their screens, and when they do it's a negative representation of them.

The bigger picture as a result of this: half (51%) of women aged 65-74 feel overlooked by society. But more than a third of every age group, across both men and women, feels the same.

This speaks to a much larger societal issue outside of TV and advertising. However, using these media formats in a positive manner is an easy and effective way of communicating to audiences that they are valued.

Beyond the programming on TV, how do people feel about being represented on screen?

Product categories are missing the mark

There must be examples of product categories doing a good job of portraying their audiences accurately and positively? No, not really. And it's not just older groups. The majority of advertising is failing to appeal to its audiences.

'Gardening' was the only category recognised positively by more than a quarter of audiences aged over 55.

'Grocery retail' had approval from around a fifth (19%) across all audiences, and 'health & beauty' was seen as positive by just a quarter (25%) of women aged between 18 and 44.

'Alcohol' and 'fashion' as categories are missing out on a significant audience. Just 3% of audiences over the age of 55 felt positive about alcohol brands' positioning of them, and 4% felt that about fashion brands.

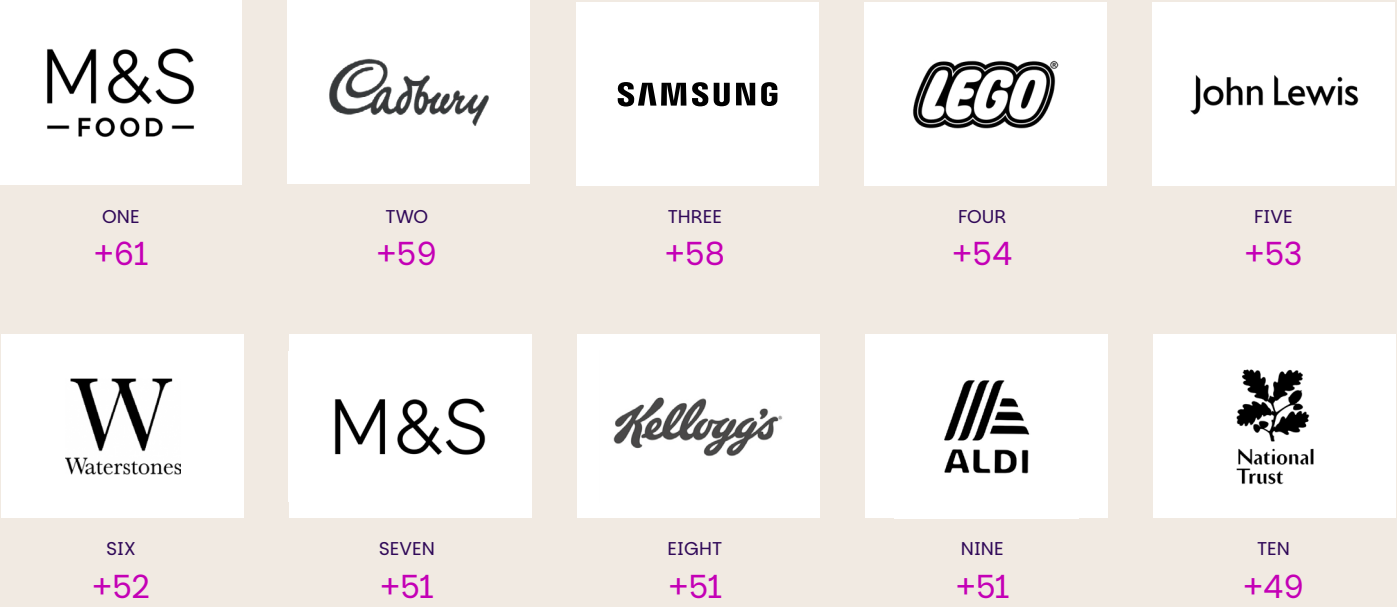
Percentage of individuals who saw health & beauty advertising as positively representing them



Some brands are getting it right

Away from broad categories, some brands are getting it right with older audiences and we want to celebrate them.

From our research with Red C, these are the top 10 brands that have been most successful in building emotional connection with 55+s.



Source: RED C UK 2025 BRI survey. Base: 55+ (n=199-244) per brand



These brands know the best tone to use in their comms to reach all different 55+s profiles

- They often use representations of older people in line with new trends...
- They are more focused on adopting a universally accessible approach that can help all people feel more included:
 - M&S works with non-polarising/uniting figures who don't fit a particular social class
 - Honest, down to earth, raw, informal and accessible representations that often don't take themselves too seriously
 - Samsung & John Lewis use clips from historical TV to project a sense of shared national history

Some human qualities are universal

These brands are understanding how people want to be seen aligning well with the findings of our research.

We asked people 'if you were going to be interviewed on TV, what would be the top three things you'd want viewers to think about you?'

We expected to find a broad spectrum of preferences – representative of an audience of men and women and more than 60 years of age difference. But it seems that some human qualities are universal like down to earth, friendly, knowledgeable and empathetic.

That's a rich lesson to learn, and shows how easy it could be to get it right when representing people positively.

Down to earth, friendly and knowledgeable

MEN	35-44	45-54	55-64	65-74
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Friendly, down to earth and empathetic

WOMEN	25-34	35-44	45-54	55-64	65-74
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As part of our research, we analysed the ways in which older generations have been represented in society

'Residual codes' = ideas and values from the past that still linger today

'Residual codes' show outdated perceptions of those over 55, widely used by brands and media for decades...

- White Middle-Class Luxury: Affluent, retired couples enjoying leisure
- Stock Photo Blandness: Generic, beige, and uninspiring visuals
- Sufferers: Frailty, illness, and dependency narratives

'Dominant codes' = represent the mainstream, widely accepted meanings

While 'Dominant codes' attempt to illustrate the breadth of characteristics currently representing this broad age range:

- Grandparenting /Family Roles: Central figures in extended family life
- Power & Authority: Older people as leaders or decision-makers
- Travel & Leisure: Active, adventurous retirees
- Quirky & Creative: Playful, expressive, "young at heart"
- Cosy Domesticity: Affluent, comfortable home life

'Emerging codes' = signal new, evolving ideas that are gaining influence

Widely celebrated 'emerging codes' for ageing are more dynamic and youthful:

- Humorous Ageing: Challenging residual stereotypes in an amusing, provocative way
- Authentic & Active: Engaged, dynamic, and socially involved
- Easy Sociality: From isolated couples to vibrant friendship groups
- Pop Culture Relevance: Older people as cultural participants
- Celebrating Ageing: Positive, empowered portrayals

And some of the more emergent representations are even quite radical!

- Creativity & Style: Bold, fashionable, and expressive
- Hedonism: Pleasure-seeking, indulgent lifestyles
- Tackling Issues: Activism, awareness, and social engagement

Is culture now saying its ok to be old as long as you're 'youthful'?

Emergent representations of those over 55 only resonate with a small portion of the varied group, tending to ignore the often less affluent groups with more conservative and cautious values.

This leaves millions still feeling under-represented despite a deliberate – and welcomed – shift to more positivity.

Do new 'youthful' representations reflect the values and aspirations of one particular type of person at the expense of others? Or do they really just reflect the outlook of young media professionals?



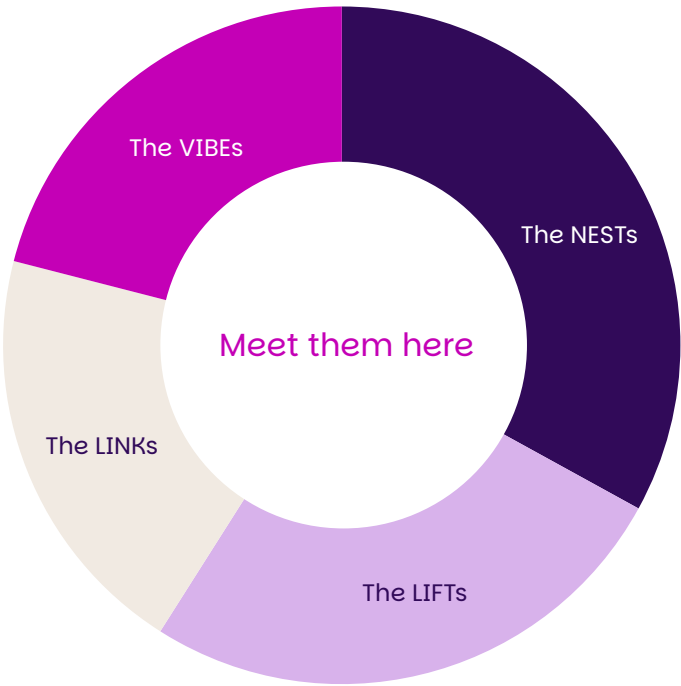
Archetypes are never perfect

Never perfect, but necessary to capture groups of people in a way that’s usable and actionable. And there’s always some truth in archetypes – that’s why they get used.

But the archetypes that are most prominent in peoples’ minds (not least in the minds of media agencies and TV programmers) aren’t archetypes anymore. They’re stereotypes: outdated and negative.

Based on our insights and research, Great! is introducing four archetypes to capture its older audience. We recognise their diversity of preferences, behaviours, emotions and situations; not simply focusing on age, drawing lazy and stereotyped conclusions.

These are archetypes working hard to best reflect – with kindness and affection – our audience: the UK’s upper third.



The VIBEs
Vibrant, Independent,
Bold Explorers

21%

Confident, optimistic, financially secure and tech-savvy. Love experiences and media that reflect their tastes.

- Most likely to say they have **money left over every month (74%)**, and most likely to agree they feel financially prepared for the future (68%)
- **54% ABC1**
- Most likely to **own their home outright** without a mortgage
- **Skewed male:** 65% male vs 35% female
- **Least** likely to suffer from a mental or physical disability
- **An older segment:** 37% are 55-64; 63% are 65+; 31% are 75+

~4.7m

The NESTs
Nostalgic, Economical,
Steady Traditionalists

33%

Routine-oriented pragmatists; TV is central (live, free, current.) Cautious about rapid change and under-represented in ads.

- Slightly less affluent, **54% C2DE**
- Least likely to have a private pension, though **59% still have money left over** each month
- Least likely to have taken a **foreign holiday** in last three years
- **Gender split evenly** 47% male and 53% female
- **Youngest group:** 45% are 55-64yrs and 55% are 65+

~7.4m

The LIFTs
Loyal, Involved,
Family-first Tenders

26%

Often carrying others — emotionally, financially and practically. Loyal streamers and Facebook users; value reassurance and respect.

- **Skew slightly C2DE (47%)**
- The **least likely to agree they have money left over** each month (48%), and just 38% of this group feel finally prepared for the future.
- Most likely to be **married / living with a partner**
- **Skewed women:** 41% male vs 59% female
- **Equally represented across the three age bands** 55-64, 65-74 and 75+

~5.8m

The LINKs
Learned, Involved,
Networked & Kind

20%

Educated connectors: volunteering, cross-generational ties, and a love of radio, books and purposeful tech.

- The most upmarket group, **65% ABC1** and nearly half (47%) have a university degree or higher
- Secure in their finances with **60% saying they have money left over** each month
- Most likely to have a **university degree** or higher
- **Most urban** – Over index in London
- **Skewed women:** 41% male vs 59% female
- **Oldest group:** 36% are 55-64 and 64% are 65+. Highest % of 75+ 34%

~4.5m

Conclusion

What does it mean to be 'not young' today? One thing's for sure, there's no single answer. We've developed this report to shine a brighter, kinder light on the UK's 'upper third', and encourage curation and creation of content with them as a valued, varied audience. Hopefully it's food for thought for those responsible for TV and advertising. And hopefully it will help to shift away from established mindsets. Ditch older stereotypes, represent people positively, and invest in stories that reflect their time and tastes. Make sure that all audiences feel seen when engaging with TV. We're celebrating what makes us different, and what unites us – like nostalgia – and pushing for better TV, better advertising and better business for everyone.

The upper third

TV audiences, and what it means
to be 'not young' today

REDC ***GREAT!***