



State of the Nation

November 2023-24

Published April 2025

Executive summary

This State of the Nation report provides an overview of key trends and events that impacted the UK between November 2023 and November 2024 – aligning with the 2023–2024 Adult Active Lives survey.

The key themes we explored were:

Politics

Economy and
employment

Demographics

Society

Technology and
connectivity

Community and
activity

The key trends and events over the year were:



Political change and political certainty: An uncertain start to the period was brought to an end by the general election in the summer of 2024. The size of the government majority provided greater certainty to UK politics. But low trust and the rising influence of smaller political parties may bring future unpredictability.



Fragmented economic experiences: The UK's economy continued to recover – but that recovery was unevenly distributed amongst the population and remained unstable. Economic pressures remain a real concern for many communities and individuals and though consumer confidence and optimism rose, they were anything but stable by the end of the year.



Immigration, generations, and birth rates: Immigration remained high through the year and exerted increasing influence over politics – whilst record low birth rates and a political and demographic shift towards the Millennial generation also occurred.

Executive summary



Weather tracker: A slightly cooler and wetter summer than seen in 2022/23, but this year continued the trend of increased warming and rainfall on historical levels. 2023/24 sat as the fourth warmest year in UK records.



Slow recoveries from disruption: The public slowly grew more optimistic about the future – but concern about healthcare and housing remained throughout the year. Polarisation existed here too – with younger generations far more optimistic than other age groups.



New tech and new concerns: Artificial intelligence dominated headlines and dominated public concerns over technology – but we remained largely positive about the impacts of technology. The use of smartphones and apps usage continues to rise for all age groups.



Polarised communities: Satisfaction with our lives and our communities tracked upwards – but with real pockets of polarisation and dissatisfaction.

After years of political uncertainty, of regular changes in political direction and new faces in government, the 2024 election has opened a new chapter. The size of the Labour majority offers an opportunity for certainty – but trust remains low, issues such as the NHS of real concern, and political popularity continues to be fleeting.

411

seats won by the Labour Party in the 2024 General Election – resulting in a majority of 174 MPs

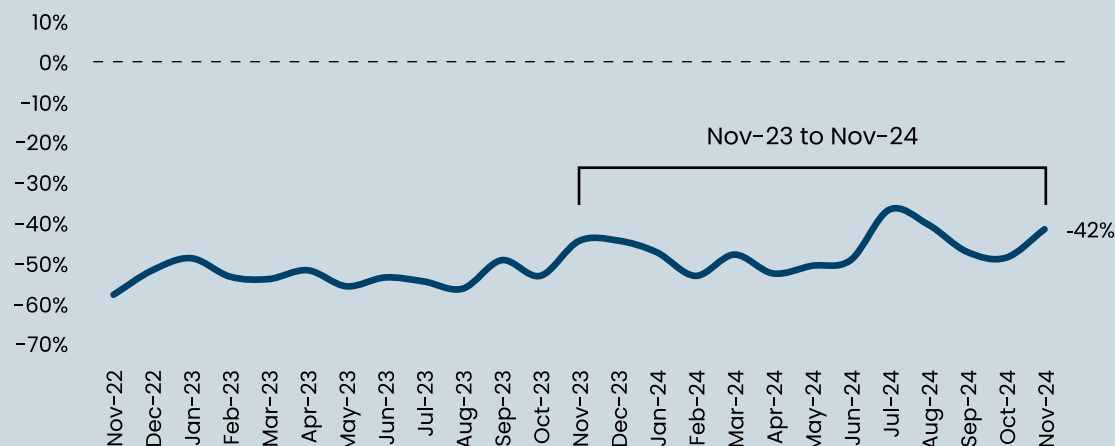
Source: Electoral Calculus

-5%

net approval (approve minus disapprove) of the October Budget amongst the UK public

Source: Trajectory Optimism Index

% Net Trust in Politicians (% Saying Trust minus % Saying Distrust)



Low trust in politicians continued through '23/'24 – though it ticked upwards through the year.

Source: Trajectory Optimism Index




Timeline

4th May 2024

Sadiq Khan secures a third term as London Mayor, whilst Labour also announce victories in Mayoral elections in the West Midlands, East Midlands, Northeast and Yorkshire

5th July 2024

Sir Keir Starmer becomes the new Prime Minister of the United Kingdom, following a landslide victory for Labour in the general election

30th Oct 2024

Rachel Reeves unveils her first budget as Chancellor, which includes £40bn in tax rises

2nd Nov 2024

Kemi Badenoch becomes the new leader of the Conservative Party, succeeding Rishi Sunak

Economy and Employment

November 2023 to November 2024 was a complex year in terms of the economy and its impacts – with recovery coming, then stalling, and with a growing sense of fragmentation and polarisation through how people experienced that recovery.

1%

growth in UK
GDP between
November '23 and
November '24

Source: ONS

4.4%

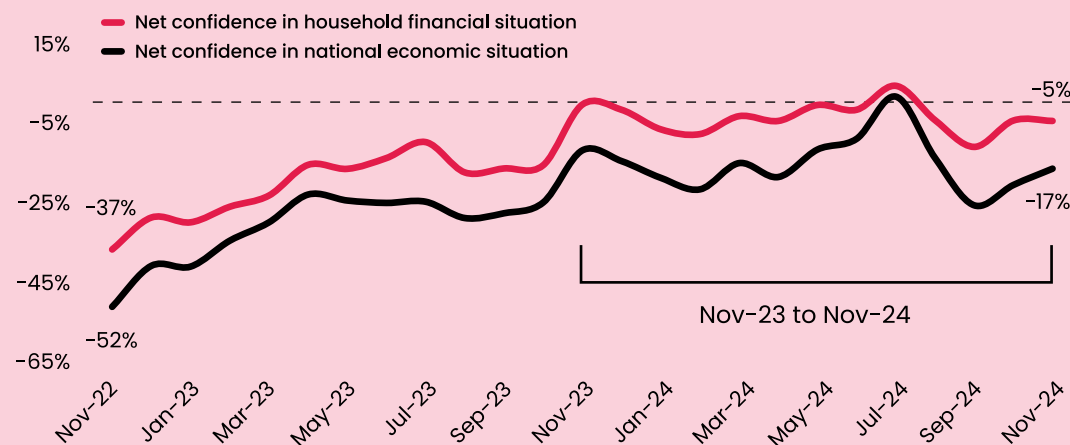
of the labour force
are unemployed in
November '23 –
0.3% increase on
previous year

Source: ONS



Economic and Household Confidence

(Net: % thinking will improve minus % thinking will get worse over next 12 months)



Net confidence in both household finances and the national economy rose compared to the previous year.

But that positivity did not last.

Source: Trajectory Optimism Index



Timeline

15th Feb 2024

UK confirmed to have
experienced a short recession

1st Apr 2024

National Living Wage rises
to £11.44 an hour

11th Sept 2024

The UK's debt to GDP ratio
reaches 100%, the highest
since 1961

6th Nov 2024

Bank of England cuts interest
rates to 4.75%

Demographics

Demographic change tends to happen slowly, and then all at once. Many of those slow demographic changes were still moving along through '23-'24 but this year did see a few more notable demographic events – from changes in our demographic balance through to the continued trend in high immigration.

22

point gap in optimism between the youngest and oldest generations in the UK as of Nov '24

Source: Trajectory Optimism Index

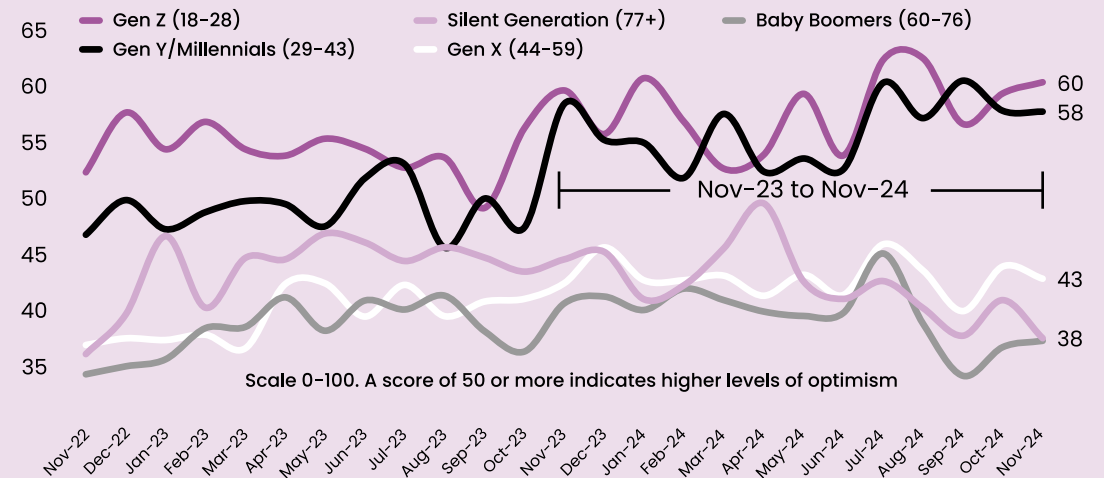
906,000

estimated annual net migration into the UK as of June 2024

Source: ONS



Optimism by Generation (Trajectory Optimism Index)



How optimistic we are about the future is becoming increasingly polarised by age.

Source: Trajectory Optimism Index



Timeline

Jul 2024

ONS estimates the UK population as of mid-2023 as 68.3m

5th Jul 2024

The win for the Labour Party in the General Election marks the first time that the Millennial generation have got the result they were most likely to vote for since 2005

Oct 2024

ONS data for the year up to June 2023 shows fewer UK births than deaths over a 12-month period for the first time since the 1970s

Nov 2024

Official figures indicate that net migration reached 906,000 in the year to June 2024, much higher than previously stated

A relatively warm, and wet, year through '23/'24. A year in which society started to recover from the disruptions of the last few years – but recovered slowly, often not steadily, and with the long-tails of those crises still in effect.

7%

more rain was seen across the UK than the historical average – and well above 22/'23'

Source: Gov.UK

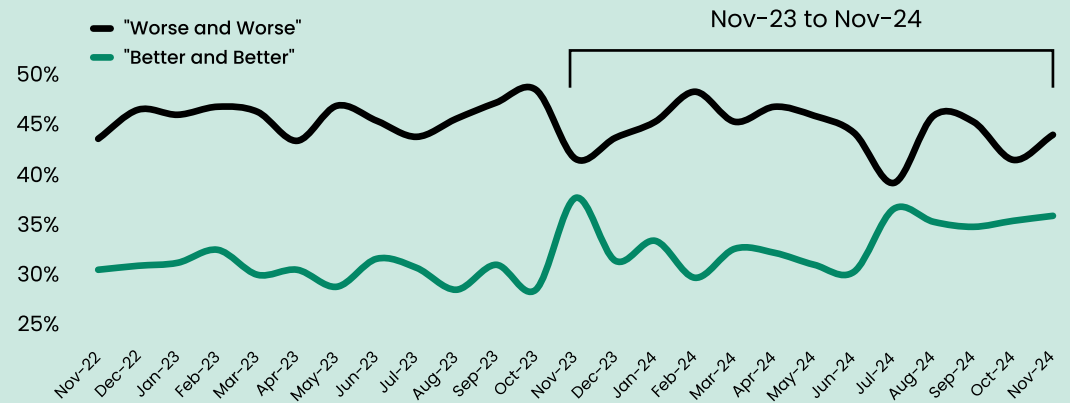
14.4

weeks median wait time for non-emergency treatment in the NHS through '23-'24 – still well above the 8.3-week pre-pandemic wait-times

Source: NHS



Proportion of UK public saying life is getting 'Better and Better' or 'Worse and Worse' over time



This chart shows the results of two questions – one that asks whether life is better today than it was 50 years ago, and another that asks whether life will be better in 20 years than it is today. Those answering 'worse and worse' have consistently been the larger group for several years now – but that gap has been growing smaller through the latter half of 2024.

Source: Trajectory Optimism Index



Timeline

8th Dec 2023

Two-year fixed rate mortgage deals fall below 6% for the first time since June 2023

21st Jan 2024

Weather alerts, including two amber warnings, are issued for the entire UK as Storm Isha brings winds of up to 99 mph

30th Aug 2024

Ministry of Justice figures show that a record high 88,350 people are in prison custody, exacerbated by the Summer riots

5th Nov 2024

The first four-day work week trial under the new Labour government gets underway – with 1000 staff at several businesses beginning the trial with no reduction in pay



Technology and Connectivity



Artificial intelligence dominated headlines and dominated public concerns over technology – but we remained largely positive about the impacts of technology. The use of smartphones and app usage continues to rise for all age groups.

75%

of our internet use was through mobile phones – with the average adult spending 4 hours and 20 minutes online each day

Source: Ofgem, May 2024

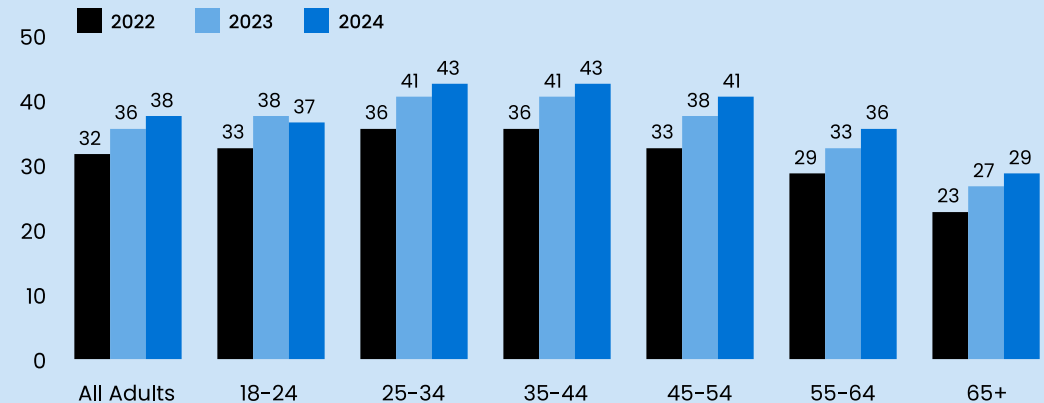
55%

of us find ourselves checking our phones without thinking – and 23% feel pressure to always be online

Source: Trajectory Optimism Index, 2024

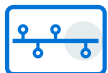


Average number of apps visited on smartphones by UK internet users each month by age



Our use of technology continues to rise – especially around smartphones and app usage.

Source: Trajectory Optimism Index



Timeline

28th Dec 2023

UK Supreme Court rules against AI inventorship of patents – meaning only human derived inventions can be patented in the UK

1st Mar 2024

UK government releases first ever government White Paper on AI – proposing initial regulatory frameworks

13th May 2024

OpenAI releases its Chat GPT-4o AI system to the public – the most powerful publicly available AI system at the time

19th July 2024

A worldwide IT outage results in severe disruption to many sectors, including banking, healthcare, telecommunications, and travel

Community and Activity

Life satisfaction and community belonging are stable, or even tracking slowly upwards, and sport and physical activity engagement continues to see changes. Yet polarisation exists here too.

-8%

difference in the distance we travel each week compared to pre-pandemic levels

Source: National Travel Survey

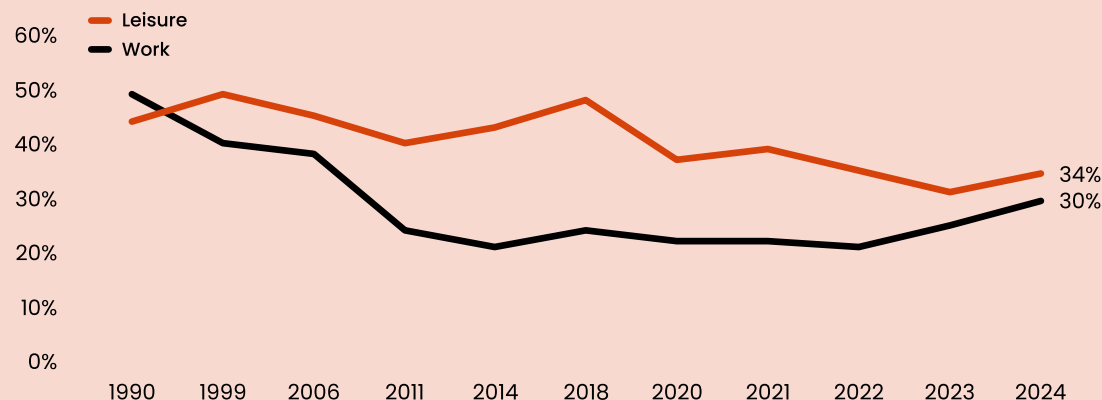
7%

increase in the number of participants attending a sport site in '23-'24 compared to the previous year

Source: Moving Communities, Sport England

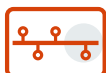


How important is the following in your life? (% Responding 'Very Important', UK)



Leisure remained important to the public – even during a continued economic crisis – but the importance of work to the public has also begun to rise.

Source: World Values Survey, 1990–2006, Trajectory Global Foresight, 2011–2018, Trajectory Optimism Index 2020–24



Timeline

8th Jul 2024

The Chancellor, Rachel Reeves, announces new housebuilding targets for England, and the loosening of planning rules to encourage more new homes

14th July

The England Men's Football team are beaten 2–1 by Spain in the final of the tournament of Euro 2024

30th Jul 2024

Anti-immigrant riots break out near Southport Mosque and later spread around the country

11th Aug 2024

UK finishes third in the Paris Olympics – with a total of 65 medals

25th Sept 2024

Petrol prices fall to their lowest level in three years