



State of the Nation

November 2024-25

Published April 2026

Executive summary

This State of the Nation report provides an overview of key trends and events that impacted the UK between November 2024 and November 2025 – aligning with the 2024–2025 Adult Active Lives survey

Many of the trends and indicators in this report are included because our analysis shows they are correlated with life satisfaction (how people feel about their lives overall). Previous analysis shows life satisfaction is strongly associated with physical activity, so factors that tend to move life satisfaction may also help us understand changes in activity.

Some influences are direct – for example, warmer and drier weather can make it easier to be active. Others are less direct, potentially shaping activity through wider conditions such as financial security, confidence, wellbeing or a sense of control. These relationships won't be the same for everyone, and can vary by age, gender, disability, ethnicity and socio-economic circumstances, so we use them as helpful context and signals of direction of travel, rather than simple causes and one-size-fits-all explanations.

The key themes we explored were:

Politics



Economy and employment



Demographics



Society



Technology and connectivity



Community and activity



Executive summary

The key trends and events over the year were:



Uncertain politics and declining trust

Political uncertainty made a return this year – with the popularity of the government and certainty over the political direction of travel declining. The importance of immigration to people rose whilst public trust in politicians fell throughout the latter half of the year. Lower trust in politicians is unlikely to affect activity directly, but it is associated with lower life satisfaction in our analysis, and as life satisfaction is strongly linked to activity, shifts in trust may reflect wider feelings of security and control that may influence how active people are.



Economic recovery but continued concerns

Over the year, the economy improved gradually in some areas, such as interest rates, GDP growth and inflation. However, public concern about personal finances persisted, with financial satisfaction¹ and economic confidence² beginning to decline from summer 2025 onwards. We expect activity levels to benefit from an improving financial picture; however, with continued concerns and lower financial confidence it may have impacted negatively on activity levels, particularly paid for activities, especially from summer 2025 onwards.



Growing gaps between generations

Gaps in outlook and optimism widened across most demographic groups this year, but the gap grew widest between generations. The oldest and youngest British adults developed increasingly different economic, political and social outlooks, with younger generations typically more optimistic about the future. These widening generational gaps may matter for physical activity too, because people's outlook and sense of control can influence motivation and confidence to be physically active.

This metric was (¹ strongly) / (² moderately) associated with life satisfaction, which is positively correlated with sporting/physical activity levels.

Executive summary

The key trends and events (continued):



Weather tracker

A warmer and drier year than '23/'24 – with almost a month's fewer rainy days across the UK. 2025 continued the trend of rising annual temperatures – marking the highest average annual temperature on record. Drier and warmer temperatures could mean an increase in sport and physical activity, though extremes in temperature can impact activity levels negatively among certain groups – especially those with long term health conditions.



AI concerns and tech wariness

The public continued to engage more with technology this year, including wearables. However, concerns about the negative impacts of AI and other technologies also increased, even as internet regulation tightened. Tech positivity¹ (or a lack of it) shows a strong relationship with life satisfaction. People who feel more positive about technology are more likely to use apps and devices that encourage more physical activity. This will potentially have more of a positive impact on physical activity levels for certain audiences, i.e. those that have access to devices and internet connection.



Leisure and sports participation stay strong

Leisure remained a key part of people's lives through the year. Yet, despite some initial improvements through the summer, the public's satisfaction with their leisure time and their local communities has stagnated. Lower levels of satisfaction here can impact overall life satisfaction, which is correlated with lower activity levels.

This metric was (¹ strongly) / (² moderately) associated with life satisfaction, which is positively correlated with sporting/physical activity levels.

Political uncertainty continued this year. Trust in politicians shifted throughout the year but was higher on average this year (-40%) than the year before (-47%) – whilst increasing concern over immigration and declining government approval saw voting intention diversify and fracture.

7%

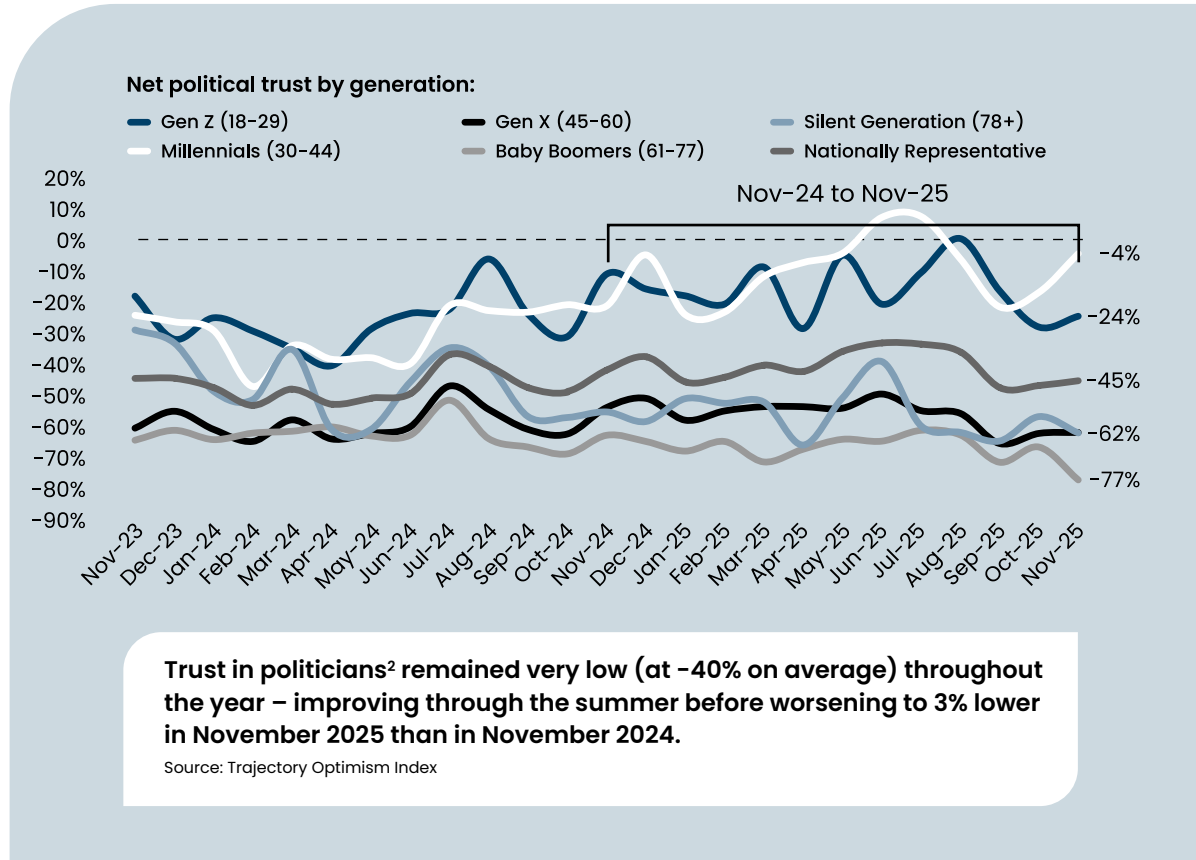
rise in the proportion of the public saying immigration was one of their top three concerns between Nov '24 and Nov '25

Source: Trajectory Optimism Index

-9%

net approval (approve minus disapprove) of the October 2025 Budget amongst the public

Source: Trajectory Optimism Index




Timeline

26th March 2025

The government's 2025 Spring Statement increases defence spending and restricts universal credit and personal independence payments

2nd May 2025

Reform UK wins 677 of around 1,600 seats contested in the English local elections, as well as winning the Runcorn and Helsby by-election

21st July 2025

The UK government launches an early review of the state-pension age, and revives the Pensions Commission

21st November 2025

Government borrowing rose to £17.4 Billion in October, higher than forecasted

Economy and Employment



November 2024 to November 2025 saw slow and steady improvements in some areas of the economy, around interest rates, GDP growth, and inflation, but the public continued express concerns over their finances. Rising unemployment is likely to have particularly affected younger groups, while those on the lowest incomes will be most exposed to economic shocks.

1.2%

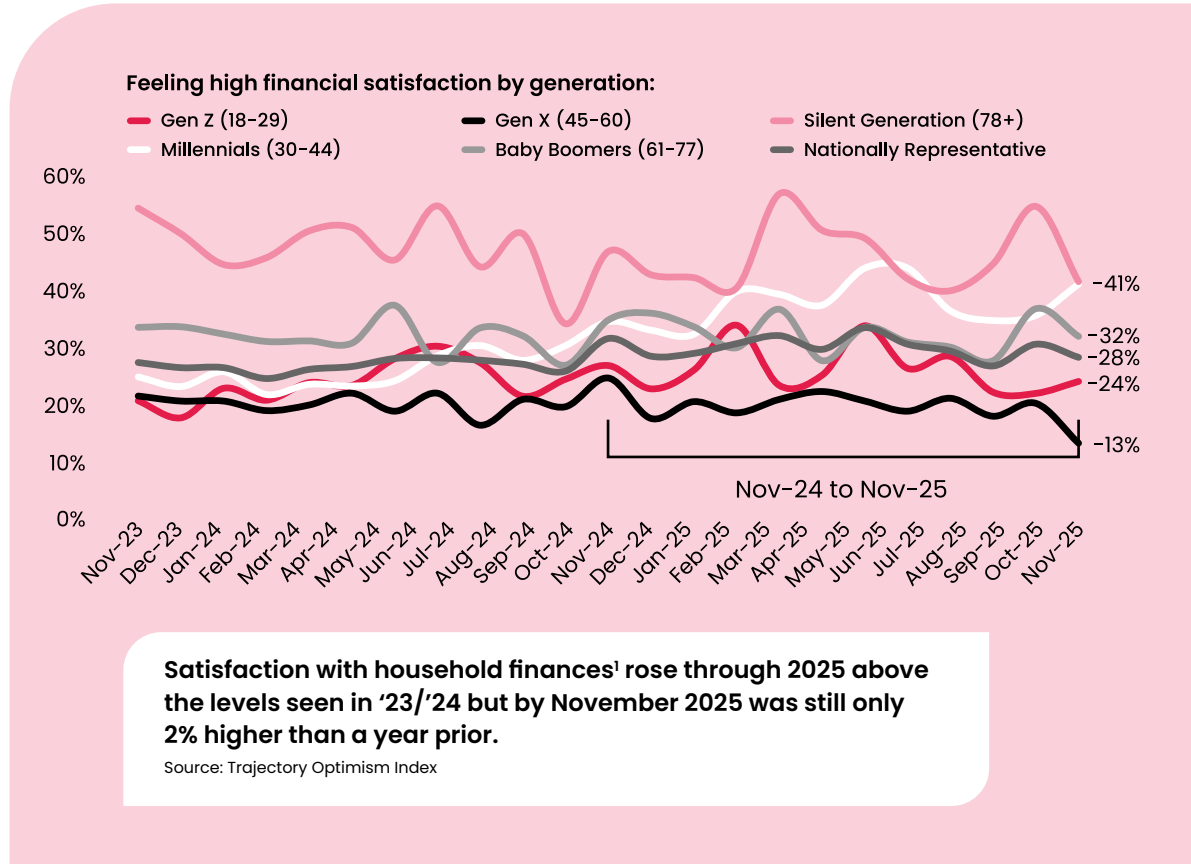
GDP growth between November 2024 and November 2025

Source: ONS

5.2%

of the labour force are unemployed in November 2025 – up 0.8% on the previous year

Source: ONS



Satisfaction with household finances¹ rose through 2025 above the levels seen in '23/'24 but by November 2025 was still only 2% higher than a year prior.

Source: Trajectory Optimism Index



Timeline

9th January 2025

UK government borrowing rises to its highest level since 2008, with the pound dropping to a 14-month low as a result

3rd April 2025

The Financial Times Stock Exchange falls sharply in response to tariffs announced by US President Donald Trump, including a 10% charge on UK imports

20th August 2025

Inflation rises by more than expected to 3.8%, its highest level since January 2024

11th November 2025

UK unemployment rises to 5% in the three months to September 2025, the highest rate since February 2021

¹ This metric was (strongly) / (moderately) associated with life satisfaction, which is positively correlated with sporting/physical activity levels.

Demographics

The generational optimism gap grew wider throughout 2025, with younger groups (Gen Z and Millennials) much more optimistic than older cohorts.

33

point gap in optimism between Millennials (30-44) and Baby Boomers (61-77) in November 2025

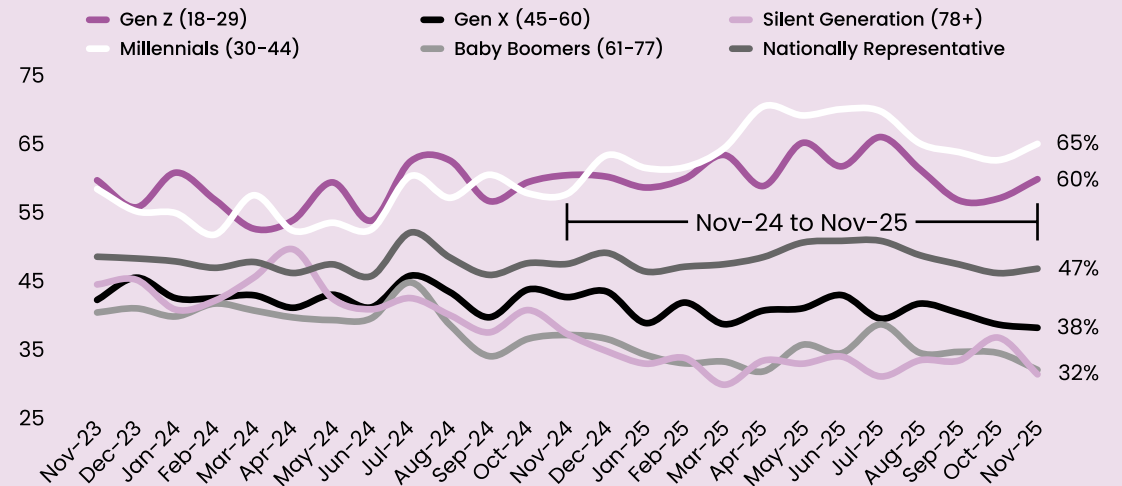
Source: Trajectory Optimism Index

204,000

estimated annual migration into the UK as of June 2025 – a fall of two thirds on 2024

Source: ONS

The optimism index by generation:



The gap in optimism about the future between men and women continued to grow throughout 2025.

Source: Trajectory Optimism Index



Timeline

27th February 2025

UK asylum claims hit their highest level since 1979, increasing by 18% year on year to reach over 108,000

31st March 2025

NHS data shows the number of births in NHS hospitals fell again by 0.5% in 2024/2025

30th July 2025

The Office for National Statistics announces that the population of England and Wales increased by 750,000 during the year preceding June 2024

27th November 2025

Net migration in the 12 months to June 2025 was down by two-thirds when compared to the same period for 2023/2024

A warmer and drier year³ than the one preceding it – and one in which wider issues such as wage growth and NHS waiting times continued to slowly improve. Yet that didn't translate into public perceptions. Our feelings of choice and control declined whilst an increasing number of us believed the UK was worse than it had been in the past – whilst fractures on social and political issues grew.

38%

of the public said they had a high level of choice and control¹ over their lives in '24/'25 – down 3% of the previous year

Source: Trajectory Optimism Index

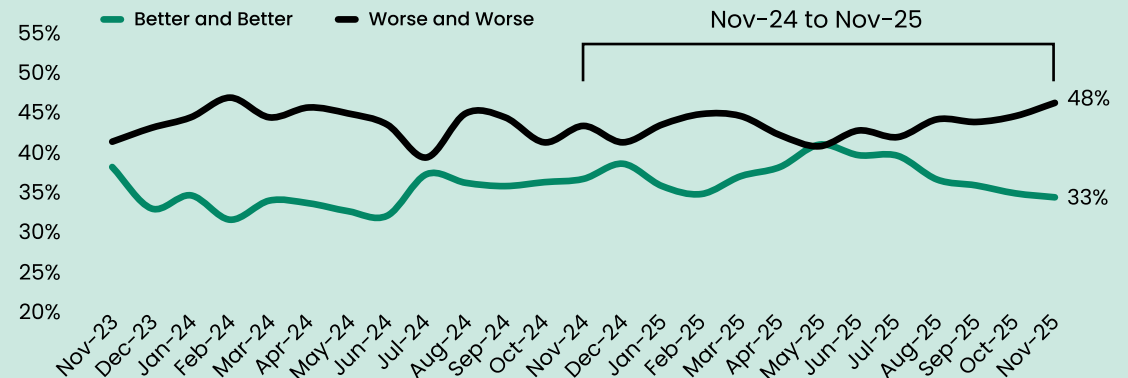
14

Weeks median wait time for non-emergency treatment in the NHS in Nov '25 – a 0.4 improvement on Nov '24 but still well above pre-pandemic levels

Source: NHS



Proportion of UK adults who feel that life is better and better versus worse and worse



This chart shows the results of two questions² – 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. Through the start of the year the gap narrowed between the two – but since the summer of 2025 perceptions of the UK have worsened.

Source: Trajectory Optimism Index



Timeline

17th December 2024

ONS data shows that average pay increased at an annual rate of 5.2% between August and October 2024, the first increase for a year

17th June 2025

MPs vote to decriminalise abortion for women in England and Wales, marking the greatest change in abortion laws for nearly 60 years

13th September 2025

Up to 150,000 people take part in a rally across central London organised by far-right activists, with counter protests also taking place

25th November 2025

The UK government announces an increase in the minimum to £12.71 for those aged over 21 and to £10.85 for those aged 18–20 from April 2026

This metric was ⁽¹⁾ strongly / ⁽²⁾ moderately associated with life satisfaction, which is positively correlated with sporting/physical activity levels. ³ Warmer, drier weather is positively correlated with sporting/physical activity levels.

Technology and Connectivity



Artificial intelligence stayed in the headlines – becoming a more prominent part of our daily lives – whilst new laws changed how we used the internet. Public perceptions of technology, and of AI, became less positive – with growing concerns over its negative impacts on society.

67%

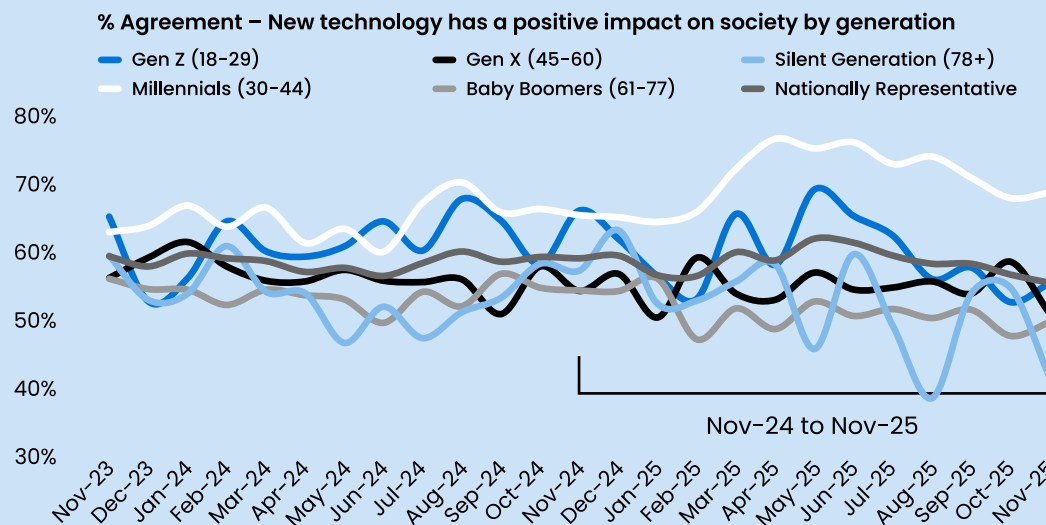
of Britons were concerned about the negative impacts of AI on society in March 2025

Source: Trajectory Optimism Index

6%

Rise in the proportion of the public who own a wearable device in 2025 compared to 2024

Source: Trajectory Optimism Index



Our perceptions of the positive impacts of technology¹ declined this year – down 4% in November 2025 when compared to November 2024.

Source: Trajectory Optimism Index

Timeline

20th January 2025

Chinese-state-backed DeepSeek AI releases a competitive AI model – raising competition in the AI sector

25th July 2025

The Online Safety Act is introduced with websites and apps imposing age verification on users as part of government efforts to improve child safety online

26th September 2025

The government introduces a New National Commission to guide and accelerate AI adoption in the NHS

20th October 2025

More than 1,000 companies, including many in the UK, are hit by a major Internet outage, caused by a system error at Amazon Web Services

¹ This metric was (strongly) / (moderately) associated with life satisfaction, which is positively correlated with sporting/physical activity levels.

Community and Activity

Leisure remained important to us – whilst sports participation stayed stable following the strong levels seen last year. Yet satisfaction with our lives, leisure time, and our communities remains mixed.

28%

of adults participated in formal volunteering at least once in the last 12 months (a small but significant increase on the previous year)

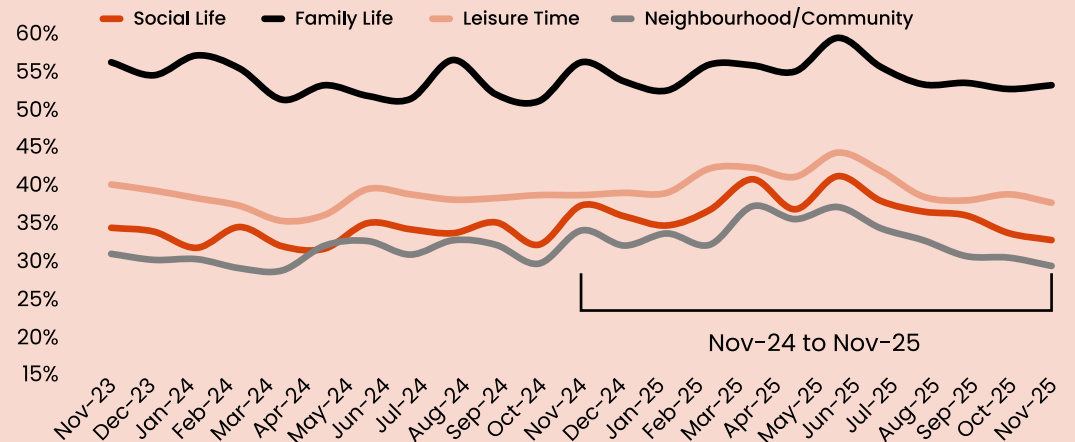
Source: Community Life Survey

42%

of Britons said that leisure was very important to them² in '24/'25 – compared to the 34% who said work was very important

Source: Trajectory Optimism Index

Proportion of UK adults who feel high satisfaction (8-10 out of 10) with each



Levels of satisfaction amongst the public were highest when it came to family life¹ – but all areas began to decline after summer 2025. Satisfaction with our local neighbourhood¹ remained lowest.

Source: Trajectory Optimism Index



Timeline

4th June 2025

Rachel Reeves announces increased investment for public transport services in the Midlands and North of England

14th Jul 2025

Thames Water become the latest provider to announce a hosepipe ban, following previous announcements by Southern Water and Yorkshire Water

27th July 2025

England's women beat Spain in the final of Euro 2025 – marking the most watched television moment of the year so far

28th September 2025

The New Towns Taskforce recommends twelve possible UK locations for the government's planned development of three new towns

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For further information on trends research
and Sport England's Active Lives Survey visit:
[Research and data | Sport England](#)



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