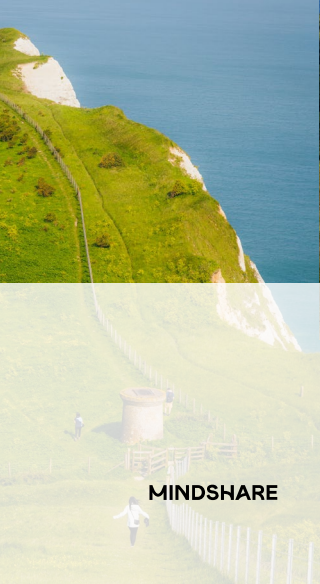
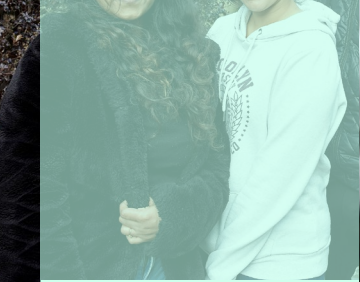


Shaping The Nation



MINDSHARE

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Reach

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captify



01 The Geography of Self

02 The Green and Pleasant Land

03 Mind the Gap

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Introduction

Places from our past contribute to who we are now. To our identity, to our values, to our sense of belonging and to our behaviours. Understanding where someone has come from can go a long way to understanding who they are.

Everyone's character is coloured by the important places in their lives — from formative childhood memories, to the first steps towards independence as adults, to where we orientate ourselves now. These places contribute powerfully to the fabric of our identities, to who we are as human beings.

But despite the strength of this relationship, the role of geography in media has traditionally been simplified to targeting bricks and mortar locations and postcode optimisations.

The big life stuff, the truths that location can unlock around how people feel, how their values are shaped, how their hopes and dreams are influenced, have been disregarded. Until now.

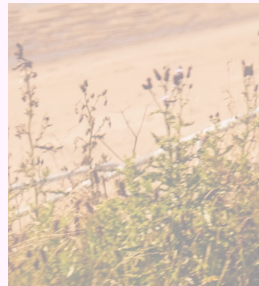
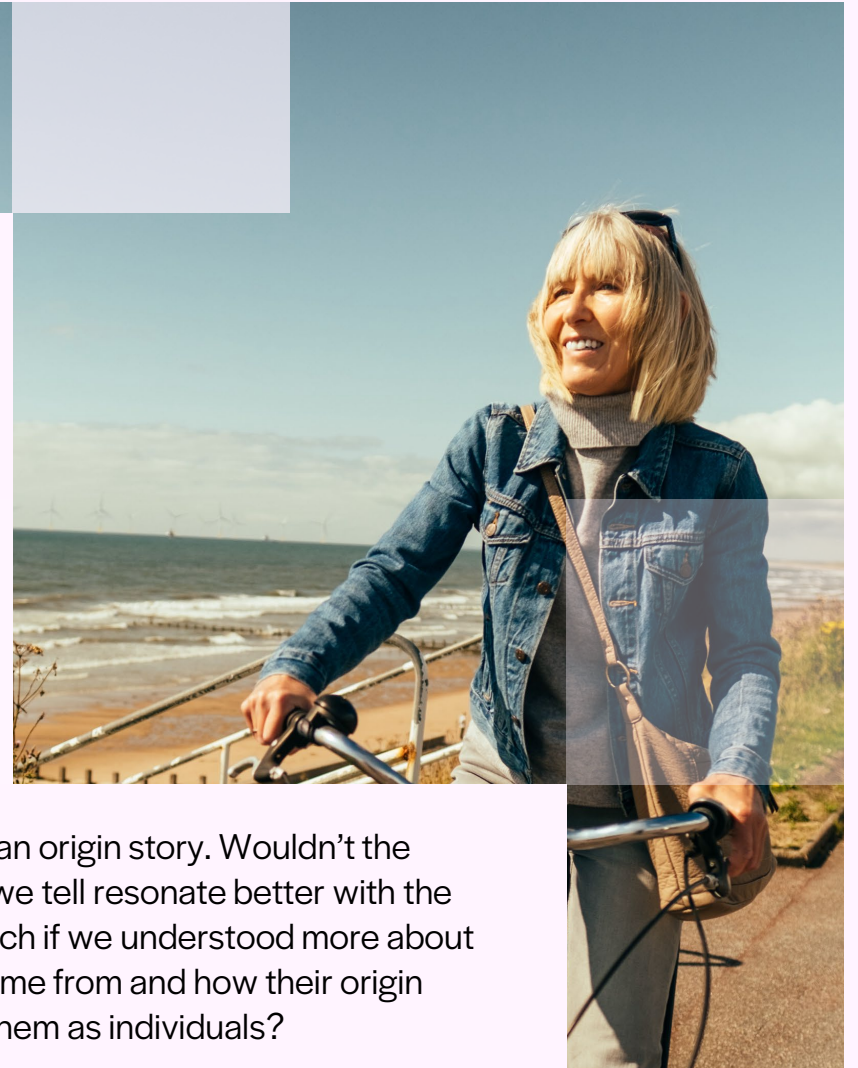
It's time now to fully unpack the untapped potential Geo offers, to further enrich our understanding of people, their behaviours and motivations. We believe this new approach offers rich and uniquely informed inspiration for conversations that brands want to authentically show up in. Meanwhile, the context and nuance it reveals can help resolve the tensions of competing dynamics – between national and local – refining and improving how we activate.

The nation shapes who we are as people. It's time to listen to the stories that matter.

Shaping

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The Geography of Self



Everyone has an origin story. Wouldn't the brand stories we tell resonate better with the people we reach if we understood more about where they come from and how their origin story shapes them as individuals?



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ORIGINAL PRICE

The interplay between location and identity

Whilst many factors shape our sense of self, there is no denying the profound influence geography has on both our lives and our identity. Where we grow up, the memories of our childhood and where our families are from are fundamental to shaping who we are as individuals. And those of us with stronger connections to where we live are more likely to feel greater life satisfaction in general.

But not everyone is living the locational dream. There's a buzz and an optimism to living in the city, with rural and coastal locations celebrating a strong sense of belonging for their areas. But towns are experiencing harder times, with many 'replica' towns feeling left behind by their struggling high streets and weakened sense of community.

“

The feeling of community is always there. Everyone's very friendly. You can strike up a conversation and next minute, you've got a new friend.

18-24, Male, Leicester

The identity of place

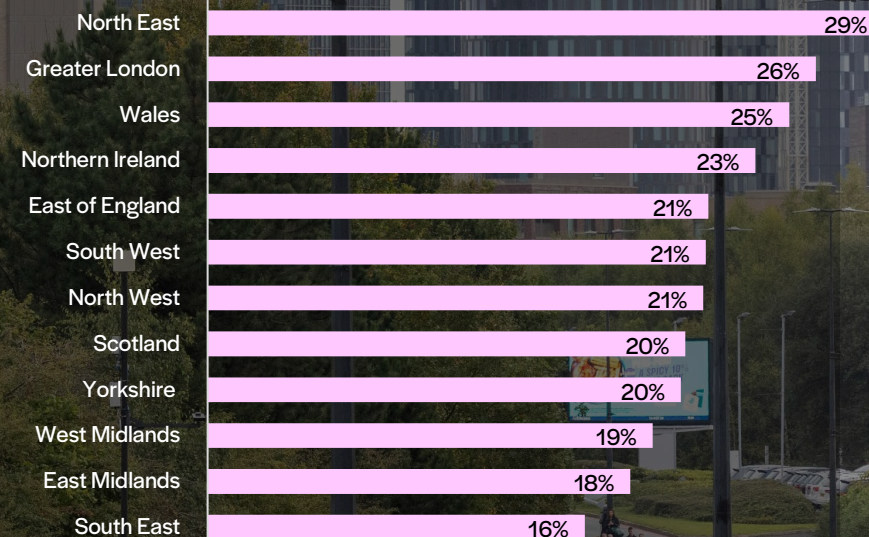
Our fascination with the locations that are woven into the fabric of people’s lives, the opportunities for shared stories and experiences of having spent time in the same place, brings into focus just how important location is for our sense of who we are as human beings.

Our sense of identity is multi-faceted, with many factors such as age, gender, ethnicity, even our hobbies contributing to that sense of who we are as a person. Within this mix, location plays a significant role. 6 in 10 agree that place is important to our sense of self – from where we grew up, to where our families are from, to where we live currently.

Given this importance, it is little surprise that the strength of feeling varies depending on where you actually live. People based in the North East, for example, rank it most highly with 3 in 10 claiming place is *very* important to their sense of self. London is also high up the list, with cities in general more likely to value the importance of place, whilst towns are the lowest. From a regional perspective, the South East and the Midlands are least likely to say that place is an important contributor to their sense of identity.

Importance of place in defining who I am as a person

% agreeing very important



“

Wherever she goes, she’s saying... She likes it. She enjoys it, but she doesn't feel home. But when she sees that sign, that sign is a big thing. It says, welcome to Doncaster.

55-64, Female, Doncaster

There's no place like home

What are the places that matter in our lives?

“

I live here at my parents' house for now. My grandma lives up the road. My auntie lives next door to her. My uncle and my auntie both live on this street, and all around is just family and friends everywhere.

18-24, Female, Leeds

Where we grow up, the memories of our childhood and where our families are from all play a role in shaping who we are as individuals. And if, as adults, we still live in the same part of the world as where we were raised, the importance of location is significantly amplified. This begins to explain the lower connection with location in the South East - in comparison with other parts of the UK it has a higher proportion of residents who have only ever lived there as adults.

Southerners don't necessarily have a burning desire to return to their childhood homes, but equally their sense of belonging around where they live currently is lower. Their roots don't run as deep.

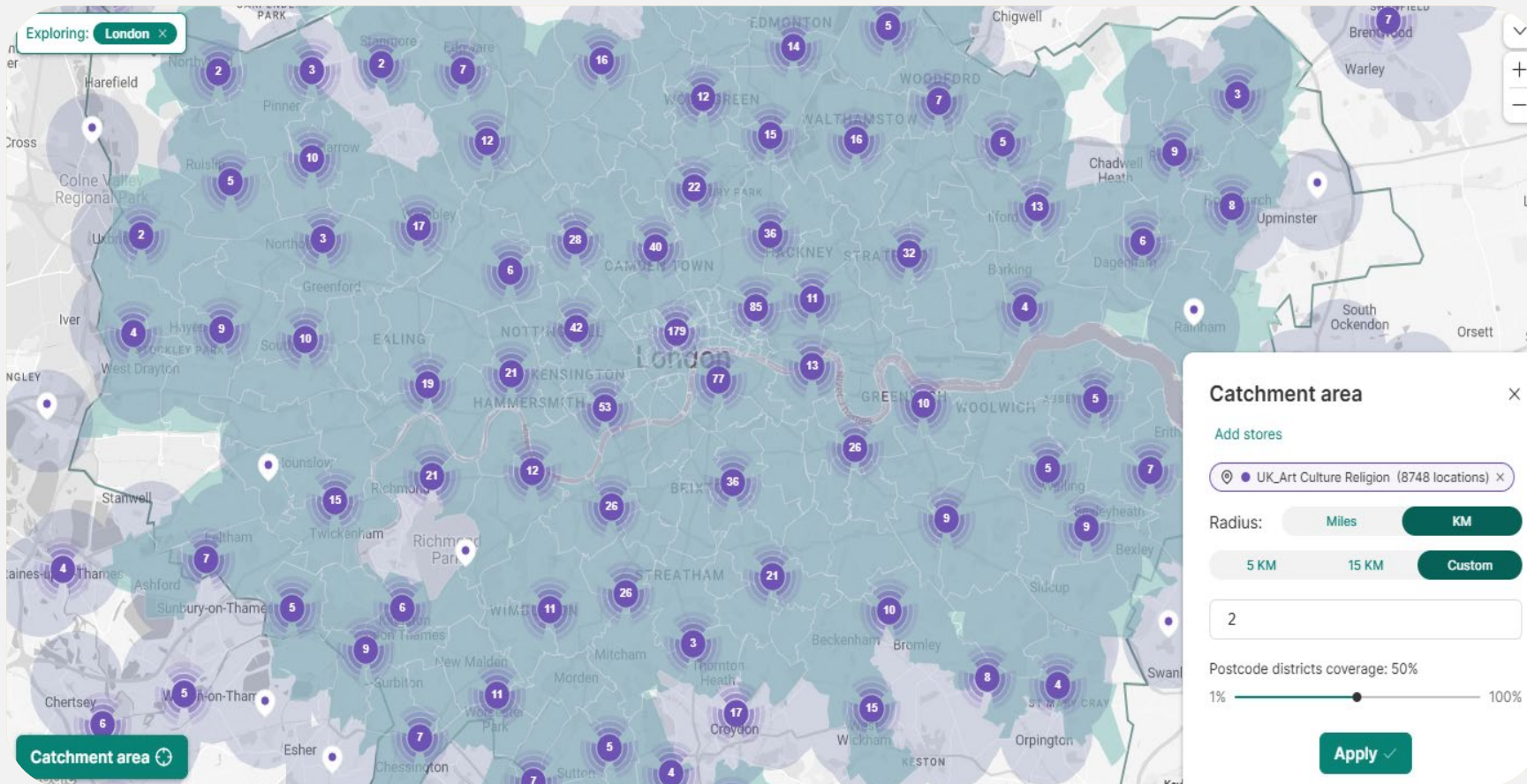
Londoners, in contrast, have created a different sense of locational identity. For them, spiritual sites, creative spaces, places of study, even sports venues are more likely to contribute to a sense of self, giving them one of the highest scores across the regions.

And a strong sense of location matters in life. Those who claim it is important to them exhibit stronger life satisfaction, scoring 7.3 out of 10 vs only 5.8 for those who say it is unimportant. People who see location as significant to them are also more likely to describe themselves as relaxed, happy, hopeful and calm, and to be more optimistic about their day to day lives.



Mapping cultural and spiritual hubs

London vs Rest of the UK



Mapping cultural hubs and cultural centres across the UK we see that London has a 30% higher density of these types of locations vs the rest of the country. We also see that 86% of Londoners live within 2km of a cultural hub vs only 24% for the rest of the UK which demonstrates a significantly greater connection to their cultural community.

A sense of belonging

Location and its contribution to our sense of identity is clearly important across a wide range of life measures. But it doesn't explain everything.

A sense of belonging also matters, of feeling at "home", at one with the location and the people. Whilst these two dimensions are connected, they are not interchangeable.

The importance of belonging comes through most clearly by the type of location where someone lives. People who live in big cities have the strongest sense of place contributing to their sense of identity, but they don't always feel they "belong" there.

Towns, meanwhile, lose out on both measures – location contributing to a sense of self is lowest, and the feeling of belonging is also lowest.

In contrast, people in coastal locations, villages, farms and the countryside are more likely to choose to live in a location because they feel they belong there. And with that sense of belonging comes stronger connection to the community, feeling lost if they were to move away from where they live, and feeling like they live in an area that significantly impacts their happiness levels.

“ Big city life never attracted me. I married a farmer. I lived on a farm. I brought the kids up on the farm. My life has always been rural-based. I find I'm disassociated from the modern world in that respect. I admire it from a distance, but I have no intention of being part of it.

55-64, Female, Ringstead

Location Identity Sense of Belonging

High

Low



City



Countryside



Suburbs



Coastal



Countryside



Village



Village



Suburbs



Coastal



City



Town



Town

The choices we make

Belonging is one reason why we choose to live where we do but there are many other reasons – both practical and emotional – for the choices we make.

Feeling safe is a key driver – mentioned by a third of people and growing significantly in importance with age. It's an element that is also ranked much higher by people living in villages with half (49%) mentioning it as a factor. Similarly green spaces and access to nature matter strongly amongst these audiences.

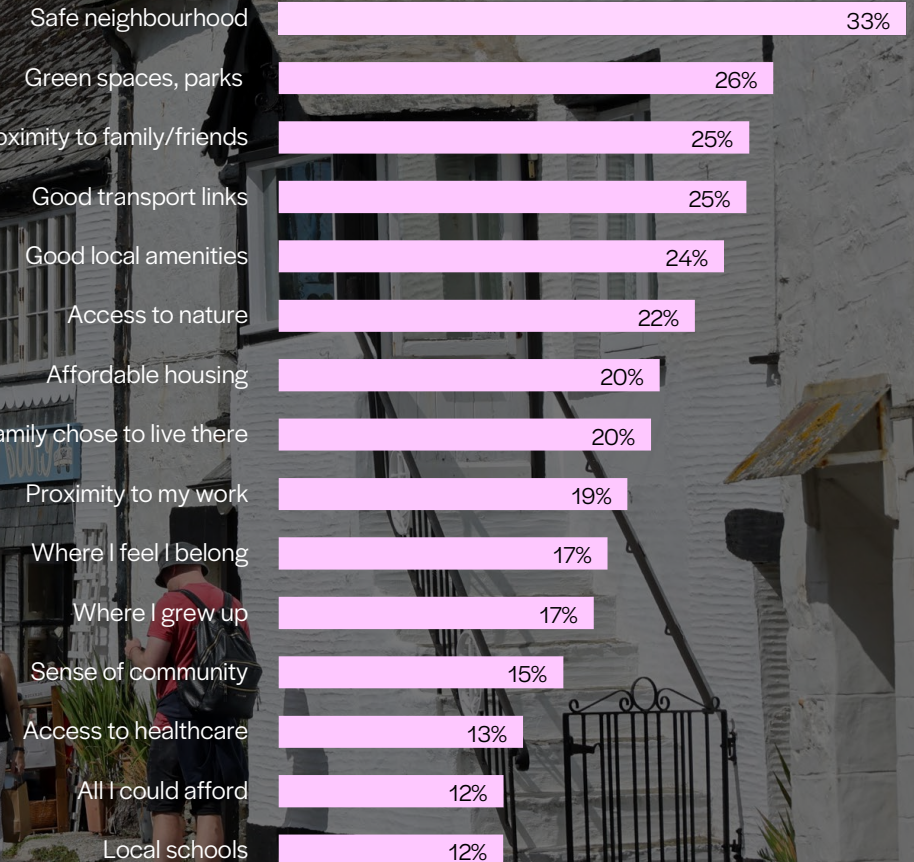
Transport links also feature highly – especially in cities – where they were mentioned by a third (32%) of residents. Whilst desired they are a factor that can also be a letdown in real life, especially outside of London.

Most locations are actively selected. However, towns tell a different story, one of a more default choice. Often people live there because that's where they were raised, because their family chose to live there, because it's all that could be afforded. Although this does offer the benefit of proximity to friends and family, town dwellers are least likely to feel part of their local community, and more likely to describe the local mood as bored, tired, and divided.

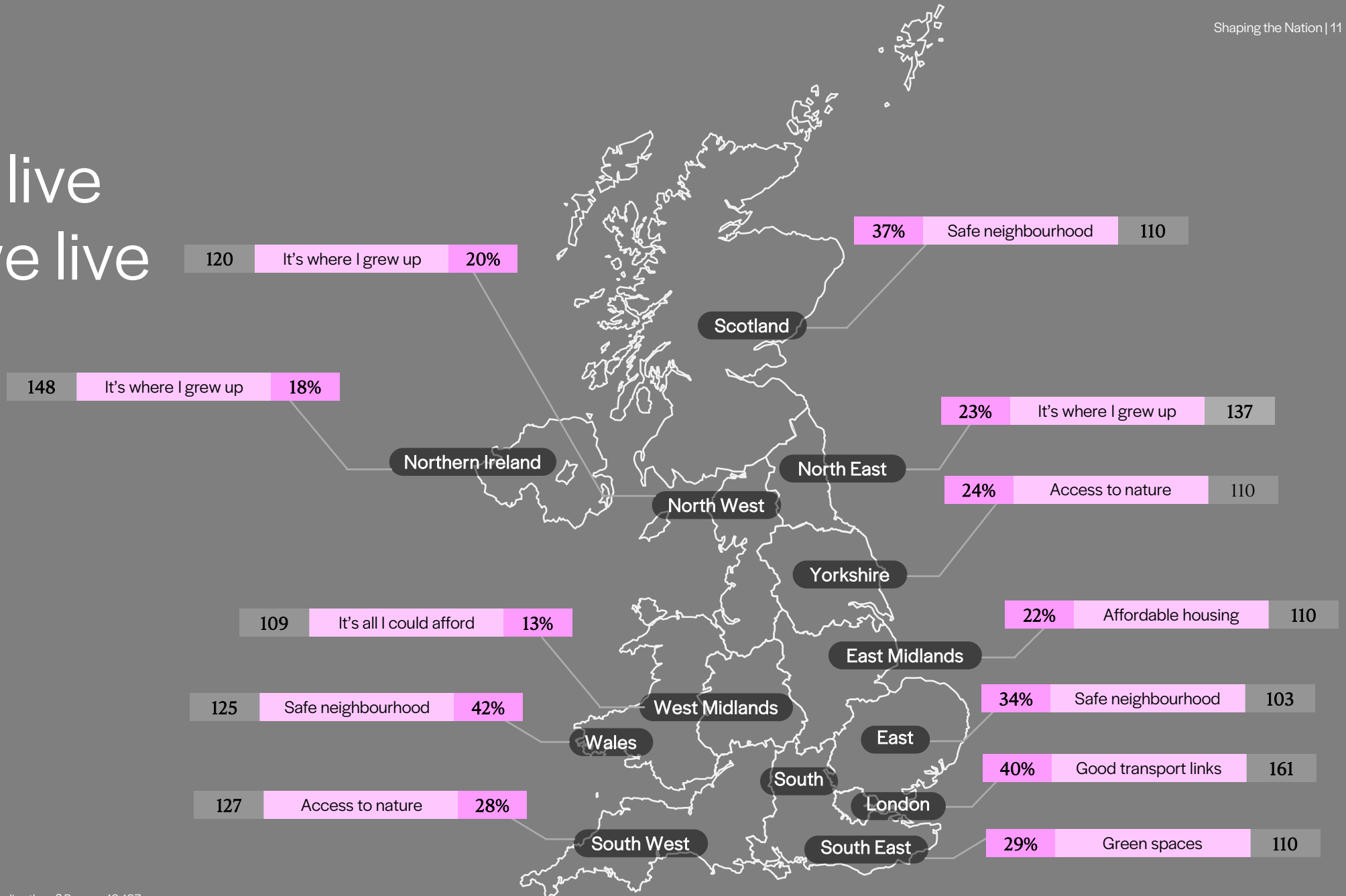
“

It's impossible to park [in Manchester]. What they wanted to do is give us a bus service and a tram service, second to none, but it doesn't work. The trams are always breaking down and it costs you £18 in the car park.

65-74, Male, Manchester



Why we live where we live



Living the dream

What are the factors that can really make a difference to where we call home?

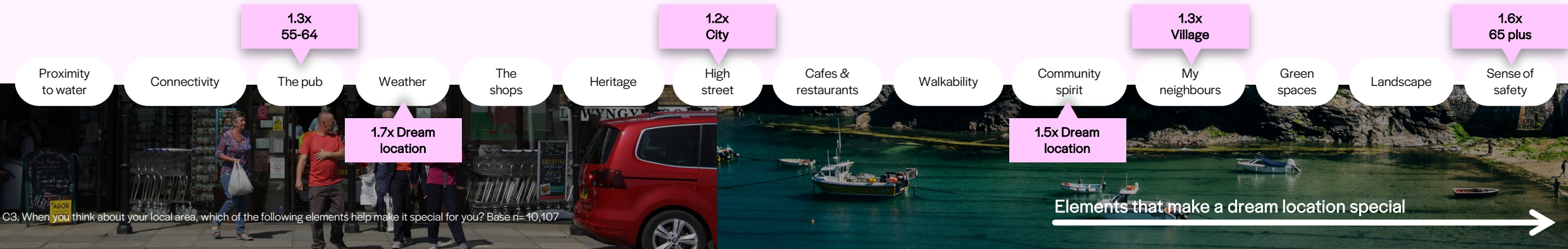
Around 7% of the population are living in their dream location. This select group are more likely to be based in the city or the countryside, and least likely to be living in a town. They're also considerably more likely to be living closer to where they were raised as children.

Given this group are considerably more likely to use descriptors such as happy (49%), peaceful (46%) and relaxed (38%) when talking about where they live, understanding what makes their locations so special provides a helpful checklist for that next move. And whilst great facilities do matter, the elusive magic is provided more by the local culture, and the people who create it, than anything else.

Community spirit, for example, is a strong indicator of a dream location – with clubs, local organisations and community volunteering all referenced as key elements in what makes a location special.

Choosing a location with deep roots and a strong heritage also helps – this might be through the celebration of customs and traditions or local festivals and events. All opportunities for that community spirit to thrive and connect.

And given this is the UK, the local climate also needs to be factored in – it's 1.7x more likely to be mentioned by those living in their dream place vs the UK population.



C3. When you think about your local area, which of the following elements help make it special for you? Base n=10,107

The tension with towns

But not everywhere is getting the experience right.

Whilst there's a buzz around the perception and experience of living in big cities, and a warmth and special feeling around 'boutique destinations' such as Southwold or Rye, more typical 'replica towns' are being left behind.

Many towns now lack the anchors to bring people together, with one place feeling much the same as the next – only a third (34%) of town dwellers describe their local area as having a strong beating heart at its centre and 4 in 10 (42%) feel like their area is stagnating. Frequently with a struggling high street, local identity and pride are lower, and the mood is dispirited.

The high streets of these replica towns are dying, with takeaways, betting shops and charity outlets replacing variety and utility. High streets offer little reason to visit, giving people no opportunity to bump into each other, to catch up and build community connections. As a result, only a quarter (26%) of people in towns talk about community spirit being a factor that makes their location special, compared with 42% of people living in their dream location.

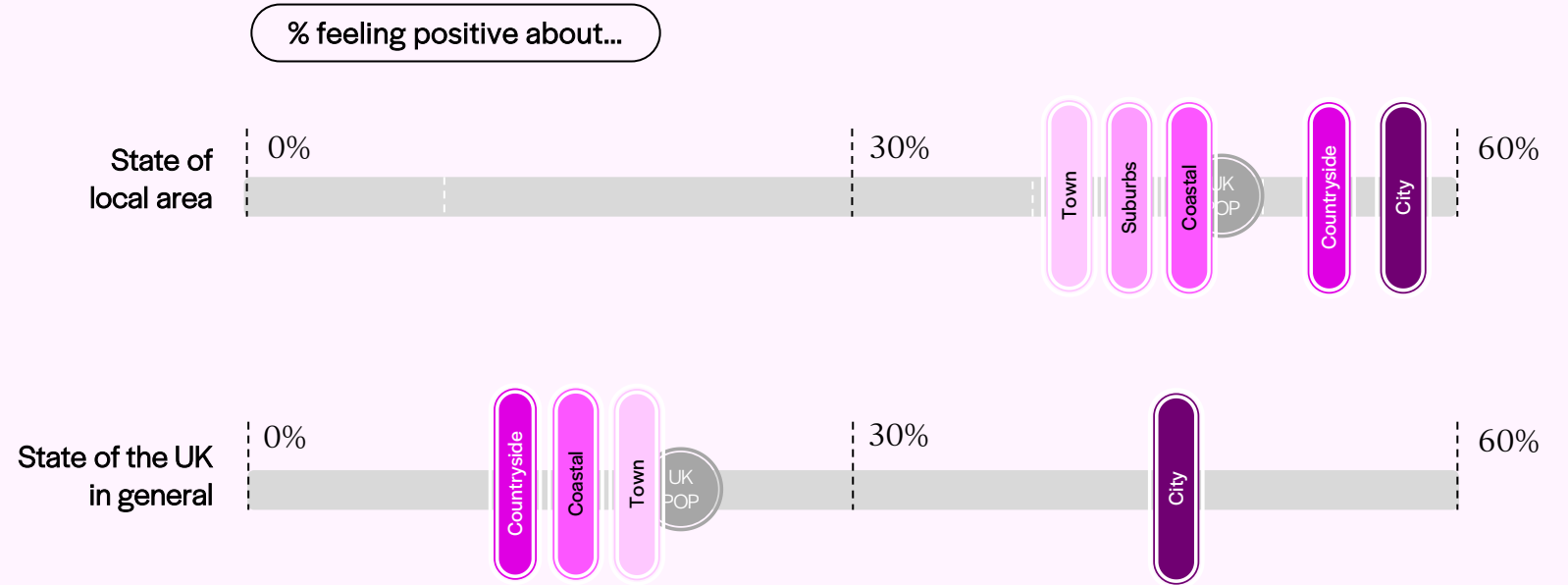
“ A lot of the shops have closed... and we've got charity shops galore. I suppose that's the same in most towns, isn't it?.. you used to be able to step into a Debenhams or a Marks and Spencers on the high street, but not anymore. They're all out of town centres now or shut, aren't they?

75-84, Female, Llanfyllin



Painting the town blue

And these lower levels of fulfilment are impacting how town dwellers are feeling about where they live and their life outlook more generally – especially when contrasted with the positivity of more upbeat city dwellers. Out of all the types of locations researched, town inhabitants are least likely to be feeling positive about the state of their local area and are equally negative about the state of the UK in general. Meanwhile on a personal level they also have the lowest levels of optimism around day to day life.



C1 Thinking about the shorter term, over the next 12 months, how are you feeling about... Base n= 10,107



Susan and Dennis, 71 & 70

📍 Manchester

When it comes to a sense of self, there's nowhere we feel more comfortable being ourselves than in our own homes. Our safe haven, the place that feels and smells unique, where we can truly be ourselves.

Susan was born in the house we met her in, inheriting it from her parents who lived there all of their lives until they passed. Her dad passed “just upstairs” she told us.

When they moved into the area it was predominantly a Jewish area — she's Jewish herself — but over the years it's changed and is now more of an Asian community. There are four mosques within walking distance and that makes parking, especially on a Friday, very difficult. But she's not tempted to move and follow her Jewish friends to Whitefield or Bury as she doesn't want to leave the place she has deep roots in. She's an anchor in the local community, which remains her community, regardless of how much it has, and is still changing.

“

I was six months old when I came... It was a lady across the road... asked my mum if she wanted a cup of tea, and I'm still friends with her daughter 70 years later.



The Green and Pleasant Land

We often choose brands because of an intuitive belief that they align with aspects of our sense of self – no more so than the feeling a brand gets the area you're from. Heritage and history for one person, for example, can mean being trapped in the past for another. How do different people's lived experiences reshape the stories your brand tells?

Shaping
The Nation

These wild isles

The enduring British love affair with nature, reinforced for many by experiences of the pandemic, shows little sign of waning. For those living in urban areas it provides an escape from city hustle and bustle. For more rural locations, it can be a source of belonging, peace and community. In an ever-changing world, nature and the countryside remain a constant, a retreat into a simpler, more meaningful way of life.

But the everyday reality of being in the countryside is not quite as easy as it first appears. With rural living often idealised, everyday isolation can get forgotten. And this separation is further reinforced by a sense of detachment from both government funding and broader, nation led decision-making.

“

I think I'd get swallowed up by [living in a city]. I like the countryside; I feel like I can breathe here. I feel like I can exist in my home without feeling constantly worried about the bills ... I'm very content, and I don't earn loads, I earn enough to be content and exist.

25-34, Female, Lewes



Our place in the country

A dichotomy exists in the minds of many villagers and country folk.

Their neighbourhoods are places of safety and strong community spirit, made real by clubs, associations, volunteering — even the pub brings people together. Because of this togetherness, the hope and optimism that exists around their local area is one of the strongest seen in the UK, with 56% agreeing they are positive about the state of their local area.

But that optimism only extends as far as village boundaries, with the rest of the UK perceived as being in a much more downbeat position. Only 14% would describe themselves as feeling positive about the country as a whole, dropping even lower to just 1 in 10 amongst farms and more isolated hamlets.

A feeling of detachment, disappointment and otherness is palpable, with London a particular irritant in this wider thinking — dominating decision making, being inconsiderate of their needs and generally ignoring the things that matter to them.

“

I don't have to engage with politics. I'm leaving that to other people. I wonder whether people in London think that Trump's going to affect them more than people who live in remote communities like this? I'm pretty certain that they would. I think what we (Countryside) do is just make derisive noises and, um, go, well, let's hold our breath for four years...again.

35-44, Female, Dorset

% in rural and coastal locations who agree that...

60%

(1118)

People look out for each other in my local area

17%

(175)

I feel like a stranger in my own neighbourhood

71%

(1111)

There is a significant divide between London and the rest of the UK

C1. Thinking about the shorter term, how are you feeling about...?, D7. To what extent do you agree or disagree with the following statements? (any agree), B11. How much do you agree or disagree with the following statements? Base n= 10107

Preserving the roots that run deep

Across the UK, festivals and folklore are deeply rooted in our history, particularly in coastal and rural locations where the preservation of tradition is tightly woven into everyday life. Coastal towns and villages are 1.4x more likely than average to think festivals and events are at the heart of their location, whilst people in the countryside are 1.3x more likely to say the heritage is a factor that makes home special to them.

Being rooted in the past brings a sense of pride, stability and contentment to people living in these areas, with 53% of people in the countryside or by the coast agreeing they are proud of their area's history. However, for the places that have lost their connection, the reality is less than idyllic.

In coastal areas that are struggling, just under a quarter (22%) feel positive about the state of their local area, compared to 6 in 10 (59%) people in thriving coastal areas.

Connections to the past can hold areas back, but for many in the countryside it is an aspect of life that is still valued, relevant and perceived as a valuable lens to influence future directions.

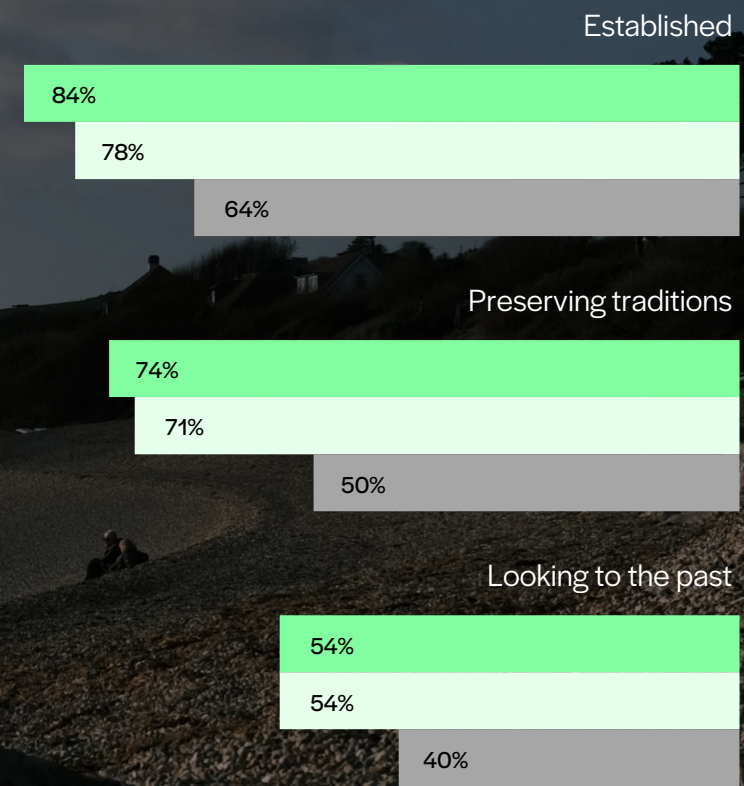
“

I remember being away in London. And not being happy with my job. And I used to come back home [to Suffolk]...and my dad would meet me with a glass of red wine at the door, and then I'd go for a walk on the beach at Kessingland... and everything would just calm down.

45-54, Female, Southwold

How would you define your location's personality?

■ Countryside ■ Coastal ■ City



C3. When you think about your local area, which of the following elements help make it special for you?, C5. Thinking about where you live, how would you define your location's personality? C12. Thinking about the longer term (i.e. over the next 5 years) how optimistic are you feeling about...? C21. To what extent do you agree or disagree with the following statements? (any agree) Base n=10107

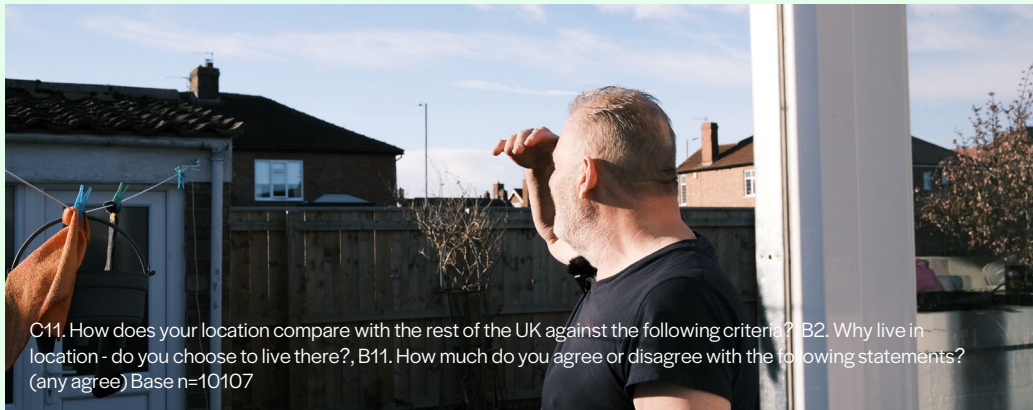
The rural escape

Nearly half (47%) of people in rural and coastal locations agree their area is a disaster when it comes to opportunities for younger people.

As a result, younger audiences can feel isolated and disconnected from their futures and are forced into looking outside of their area for different experiences and better career prospects. Just over half (53%) of rural under 25s dream of living somewhere else.

Over 65s are 1.7x more likely than average to say that the strong sense of community is why they've chosen to live in rural and coastal areas, but for under 25s, this sense of community can feel like both a blessing and a curse. Not having like-minded people their age can leave younger audiences feeling isolated and lonely, with nearly 4 in 10 (38%) feeling trapped in their current location.

Without access to a car, transport is expensive and difficult, leaving many young people in rural areas cut off from the rest of the country and forced out into bigger towns and cities where there are more opportunities for their future.



C11. How does your location compare with the rest of the UK against the following criteria? B2. Why live in location - do you choose to live there?, B11. How much do you agree or disagree with the following statements? (any agree) Base n=10107

“

The things that happen in cities are almost like a whole other world in some ways compared to what happens around here which feels more detached.

18-24, Male, Cullompton

“

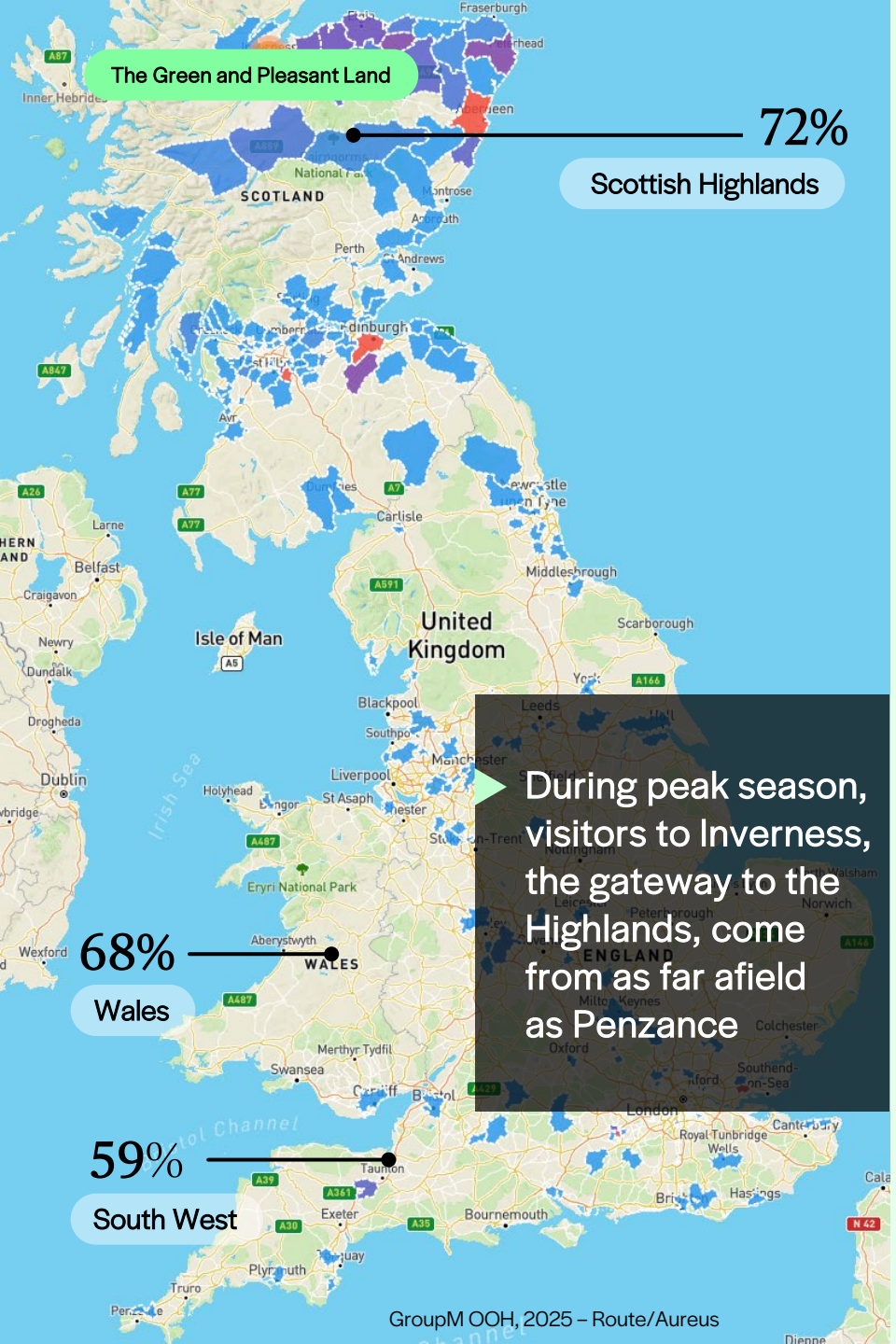
It's made me quite resentful. I spent a long time feeling very bitter because a lot of job opportunities and intern opportunities are in London. And I can't do it because I'm out here.

18-24, Female, Strachan

“

There's a real contrast between that supportiveness and everyone helping each other and knowing that could disappear if you upset the wrong people.

18-24, Female, Eardisland

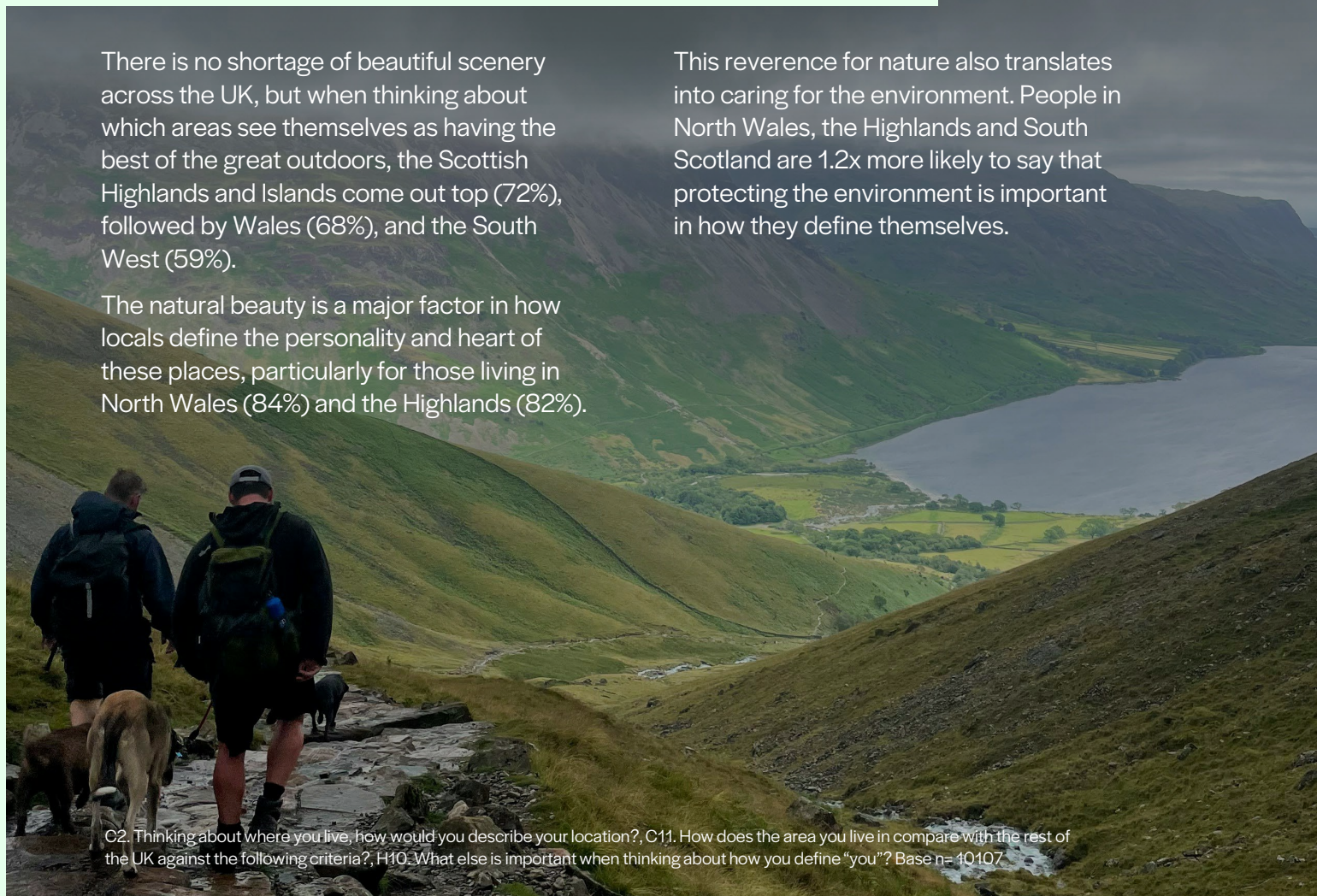


The greatest outdoors

There is no shortage of beautiful scenery across the UK, but when thinking about which areas see themselves as having the best of the great outdoors, the Scottish Highlands and Islands come out top (72%), followed by Wales (68%), and the South West (59%).

The natural beauty is a major factor in how locals define the personality and heart of these places, particularly for those living in North Wales (84%) and the Highlands (82%).

This reverence for nature also translates into caring for the environment. People in North Wales, the Highlands and South Scotland are 1.2x more likely to say that protecting the environment is important in how they define themselves.



C2. Thinking about where you live, how would you describe your location? C11. How does the area you live in compare with the rest of the UK against the following criteria? H10. What else is important when thinking about how you define "you"? Base n= 40107



Vanessa, 51

📍 Southwold

The words ‘pleasant’ and ‘Southwold’ were born to go together. It’s recently been called the ‘Quintessential English Beach Town’ by The Beach Guide, and it’s clear to see why when you visit, which we did, to meet Vanessa.

Vanessa has been running her boutique clothing and lifestyle store, Collen and Clare in Southwold, since 2002. It moved location slightly in its early years and is now situated in a historic building that has been a clothiers and drapers since the 1500s. Vanessa talks warmly of her base — her “home” — in Suffolk and North Norfolk.

For her, ‘home’ means “the beach, the coast, the sky” and after spending her early career in London she’d drive home on a Friday night along the A12, and her father would be waiting for her with a glass of wine at the front door, which she’d take onto the beach.

“

Coming home to me probably means the beach, the coast... and the sky. I would say I'm a Suffolk girl.

Mind the Gap



Whether you're a Smoggie or a Norn Iron – or from anywhere in between – your primary orientation is local not London. Obvious – especially if you're not from London. But do you really understand how loyalty to where you're from informs your view of London, and vice versa?

Shaping
The Nation

Mind the Gap

A tale of many cities



London is a place that everyone has an opinion on, regardless of how much time they have spent (if any) in the capital. However, as is often the case, the perception from those living elsewhere in the UK is often different from the reality within.

Looking from the inside out, positive perceptions are driven by hustle, speed and drive especially amongst younger audiences, combined with a level of connectivity and infrastructure that can only be dreamed of in other places. The city is built on many microcosms that ladder up into a multifaceted space.

Hearing from different regions, our study found that many people feel like there is a huge disconnect between London and the rest of the UK, with the city feeling more global than British.

The nation's relationship with the capital feels different than that seen in other countries. People have long spoken of the 'London Bubble', but scratching the surface reveals a much more complicated connection.

“

I think one of the best things ... it's London's diversity and you know that isn't going to change. There's a huge wave of communities, obviously, all 32 boroughs are very different. But I think that's brilliant and it is everything from religion to different ethnicities.

Deanne Blaylock - Editor, MyLondon

London calling for ambition and drive

The bright lights of London have often been a call to those looking for a life of excitement and adventure, but for those living in the city, what is the reality?

When looking at life satisfaction, London sits much higher than the rest of the country with an average of 7.1 out of 10, compared to the South West where the average is 6.6.

Thinking about what defines the city, Londoners see it as ambitious (64%), future-focused (62%) and embracing change (52%).

In many careers, London feels like the place to cut your teeth and make a name for yourself. The ambition of the city is driven by younger generations, with good employment opportunities the reason to live in the city for both Gen Z (i194) and Millennials (i285).

Among older generations, the city provides access to a more connected standard of living, with transport links coming out top for Gen X (i186) and Baby Boomers (i207).

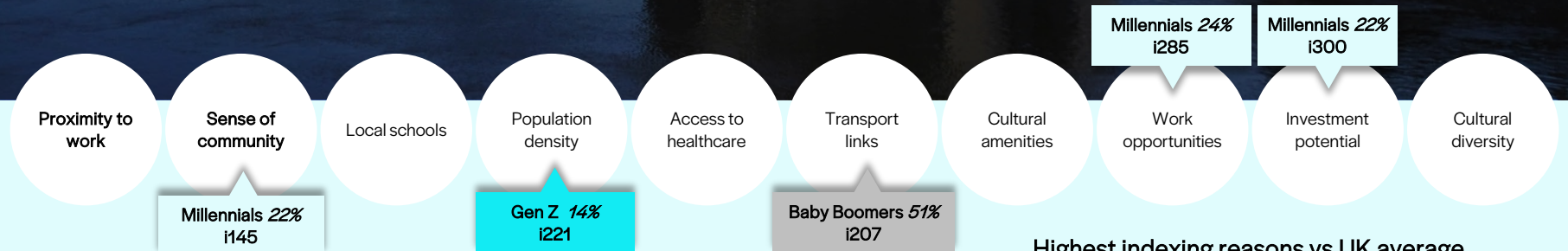
But this ambition and drive doesn't always translate into permanence. A third (34%) of Londoners would like to move back to where they grew up – the highest percentage of all the regions.

“

I was a journalist and there's always been a sense that if you wanted to really test yourself as a journalist, you had to go to London. You had to go to Fleet Street, if you can make it in Fleet Street, you can make it anywhere. And if you hadn't been to Fleet Street, you would always be thinking, could I have succeeded in London?

45-54, Male, Kelso

Why do you choose to live in London...



A1. Thinking about your life, what score would you give it out of 10?, C3. When you think about your local area, which of the following elements help make it special for you?, C5. Thinking about where you live, how would you define your locations personality? Base n=10107

Borough to borough, the city changes

At 607 square miles, and with 8.9m residents, London covers a huge amount of territory and is often seen as a behemoth without human connection or community.

However, scratching the surface reveals strong communities centred around boroughs and high streets that all ladder up into the bigger patchwork of London.

For just under half (47%) of Londoners, their area has a strong beating heart at the centre, second only to Northern Ireland. Having this connection to a smaller pocket of people helps to make it feel manageable to navigate the wider city scale.

Within these different areas, people feel extremely passionate about backing local. 7 in 10 (71%) Londoners agree it is important to have independent shops on their local high street, the highest sentiment expressed of all the regions. Keeping the village spirit alive fosters a sense of connection and rallies against the stereotypes of London.

“

Even in London it's a series of villages, isn't it? You might be in London, which is massive, but actually your community might only be 20 streets.

55-64, Female, Whitchurch

“

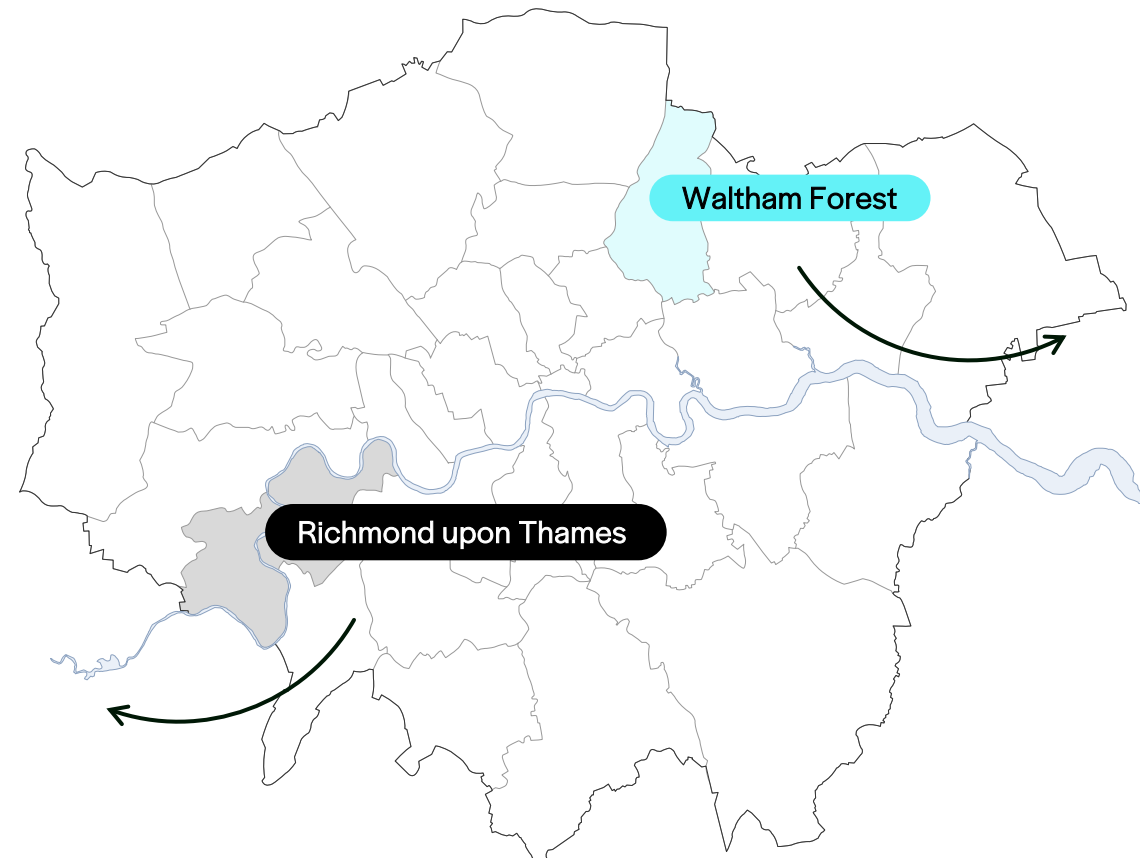
London is full of pockets and boroughs and communities of people that are really passionate, they really care about each other, that's what London is built on, but it's built on hundreds, if not thousands of these kind of micro-communities.

Deanne Blaylock - Editor, MyLondon

A snapshot of the areas that create the patchwork of London

Richmond upon Thames sees high footfall at its upscale boutiques, fine dining spots, and exclusive wellness venues. The visitation rate at Gail's Bakery, for instance, is five times greater than the national average, highlighting its strong local appeal.

- **Luxury Boutiques & Fashion:** Includes refined boutiques like Iris Fashion and Brigdens
- **Fine Dining & Gourmet Cafés:** Features upscale dining and café experiences such as Petersham Nurseries Café, 144 On The Hill, Gail's Bakery, and Ole & Steen
- **Beauty & Wellness:** Includes luxurious wellness destinations such as Skin Matters, Re:lux London, and Aromatherapy Associates
- **Home & Lifestyle:** Includes high-end home décor and lifestyle products at Petersham Nurseries Home.
- **Fine Wine & Spirits:** Offers exclusive wine experiences, including The Good Wine Shop and Kew Wine.



Home to a diverse and creative community, Waltham Forest attracts young professionals, artists, and entrepreneurs drawn to its affordability and vibrant atmosphere.

- **Craft Breweries & the Blackhorse Beer Mile:** Includes local favourites like Signature Brew, Exale Brewing, Wild Card Brewery
- **Pilates Studios & Wellness:** Features high-end wellness spots like Pause Pilates, Stretch and East of Eden
- **Converted Industrial Spaces - Cafés & Bars:** Includes unique venues like Big Penny Social (a beer hall and community bar in a converted railway arch), Project 660 (café and cycling hub with premium coffee and food), Hucks (speciality coffee shop in a transformed train arch), and Mother's Ruin Gin Palace (micro-distillery and gin bar with artisanal cocktails).

On the outside, looking in

The online discourse around attitudes towards London is often dominated by negativity and a feeling of ‘us and them’, but exploring sentiment towards the city across generations brings out a different perspective.

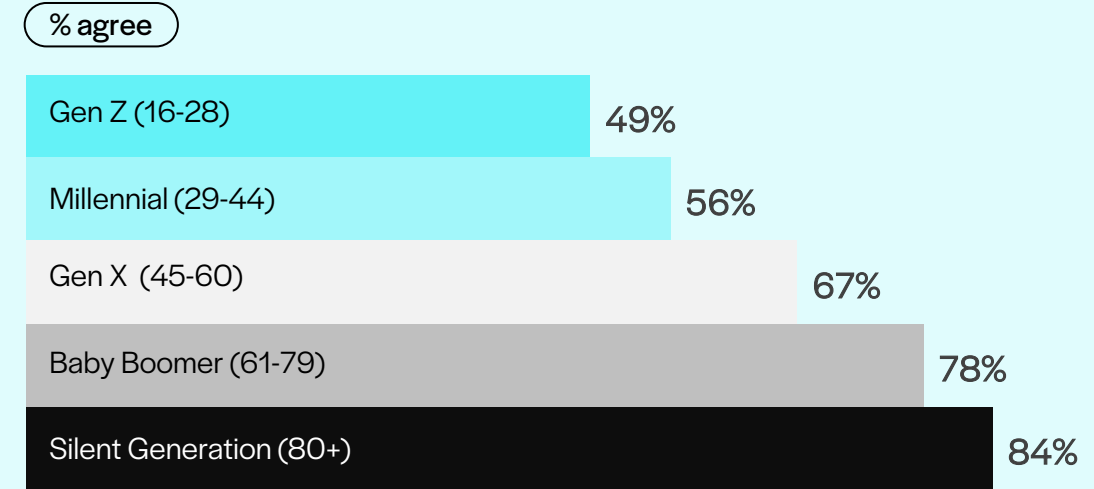
Younger age groups are much more positive about the city, with half (49%) of Gen Z and 46% of Millennials saying they like London, compared to only a third (35%) of Baby Boomers. For these younger generations, London feels like a place where everything is exciting and energetic, with a third (36%) feeling like all the best ideas and energy come out of London, compared to only 16% of Baby Boomers.

When exploring where this older generational aversion comes from, there are a whole host of reasons why they dislike the city. For Gen X it is centred around London feeling unfriendly (51%) and pretentious (33%). Amongst Baby Boomers, it's too expensive, too crowded, too noisy.

They are also sick of everything being centred around London (44%) and it having so much power (39%) with ULEZ (36%) emblematic of these traits.

This negative narrative around London often drowns others out; the strong thread of positivity appearing amongst younger generations does offer a more balanced perspective on our capital city.

There is a significant divide between London and the rest of the UK



Londoners are...

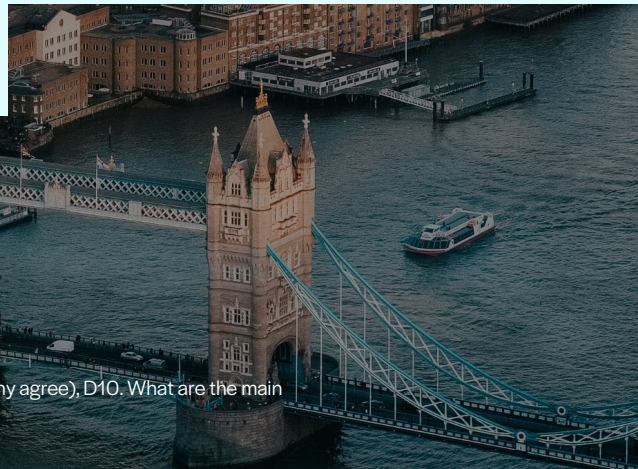
Diverse Friendly Busy
Rude Unfriendly Self-centred
 Foreign Arrogant OK Good Great

London feeling adrift from the UK

For people living outside of London, their perception of London is often driven by the national news and stereotypes of the city as insular and crime ridden.

However, with two thirds (65%) of people in Northern regions agreeing that decisions in London rarely consider the needs of other regions, feelings of dislike are directed towards London more as a centre of power as opposed to a cultural city.

While a quarter (25%) of the South feels negatively about London, this comes from it feeling noisy (60%), dirty (50%) and ULEZ (33%). In the Midlands, dislike of London grows to 28% and levels continue to rise in Scotland, Wales and Northern Ireland (30%) and the North (31%). In these areas, feelings are not driven by London as a city and somewhere to visit but the place where decisions are made, power resides, and regional voices are unheard.



D7. To what extent do you agree or disagree with the following statements (any agree), D10. What are the main reasons you dislike London? Base from n=2638 - n=10107

Scotland **53%**
i130

North **51%**
i127

South East **29%**
i72

London is not representative of modern Britain

North **68%**
i113

S/W/NI **67%**
i111

London **48%**
i79

There is a significant divide between London and the rest of the UK

I'm sick of London telling us what to do

North **51%**
i117

S/W/NI **48%**
i108

Midlands **47%**
i106

National media focuses too much on London

North **70%**
i110

South West **67%**
i105

London **56%**
i88

A Manchester supernova

When asked about a new capital city, while a quarter (25%) think that it should stay as London, Manchester comes in second at 18%, rising to 23% for under 35s, who would choose it over London.

The buzz surrounding one of the North West's biggest cities has been growing over the years and Manchester is moving forward as a Northern powerhouse.

For those living in Manchester, the top reasons for living in the city are the transport links (37%) and local amenities (28%), they are also 1.8x more likely than average to say good employment opportunities, second only to London. With big global businesses and corporations opening offices in Greater Manchester, the expectation that you must be in London to get ahead no longer rings true.

There has always been an energy to the city's cultural scene that shows no signs of slowing down, with residents being 2.1x more likely than average to put arts and music at the heart of the city. With 61% agreeing that their local area and community are resilient and ambitious, Manchester is cementing itself as a strong challenger to lead city.

“ The culture, the sport, the people, the ability to innovate in the face of adversity, to look at what we need to be and find a way to get there, whatever obstacles are in our way, so many great innovations and inventions have come out of Greater Manchester.

Sarah Lester – Editor, Manchester Evening News

Which city would you choose to be capital?



22%	Gen Z (16-28)
21%	Millennial (29-44)
18%	Gen X (45-60)
14%	Baby Boomer (61-79)

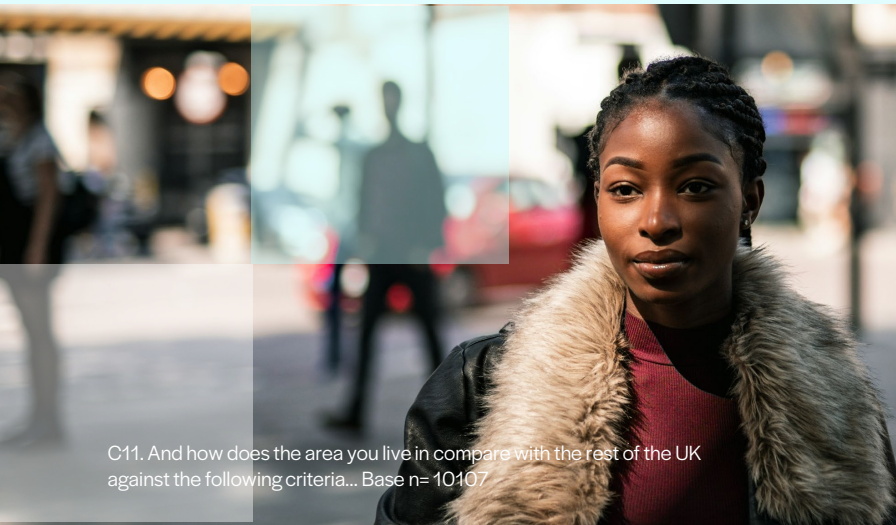


D5. Which UK city, other than London, would you choose to be the capital city of the UK? Base n=10,107

Simply the best?

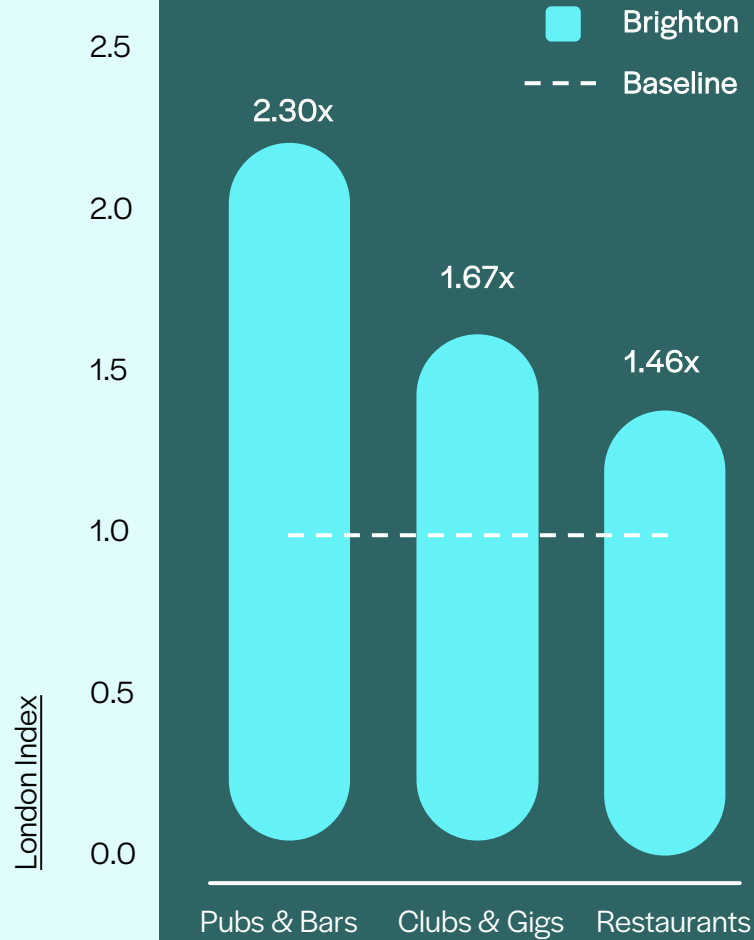
When comparing themselves to the rest of the country, there are multiple criteria where Greater London as a region feels like they do it better than anyone else. Nearly half (46%) of Londoners feel like all the best energy and ideas come out the capital city.

But the jury is out as to whether the capital really is the best. Particularly when approaching from the perspective of other cities, London starts to fade into the background and there are places across the country that feel like they are topping the bill.



C11. And how does the area you live in compare with the rest of the UK against the following criteria... Base n= 10107

Nightlife Lovers: Brighton vs Rest of UK



Captify onsite search network – Jan-Dec '24 – Search for nightlife intent, including clubs, pubs, bars and restaurants, indexed vs rest of UK

% that think their area is the best for....

58%

Best sense of humour
Newcastle

56%

Best sports team
Liverpool

51%

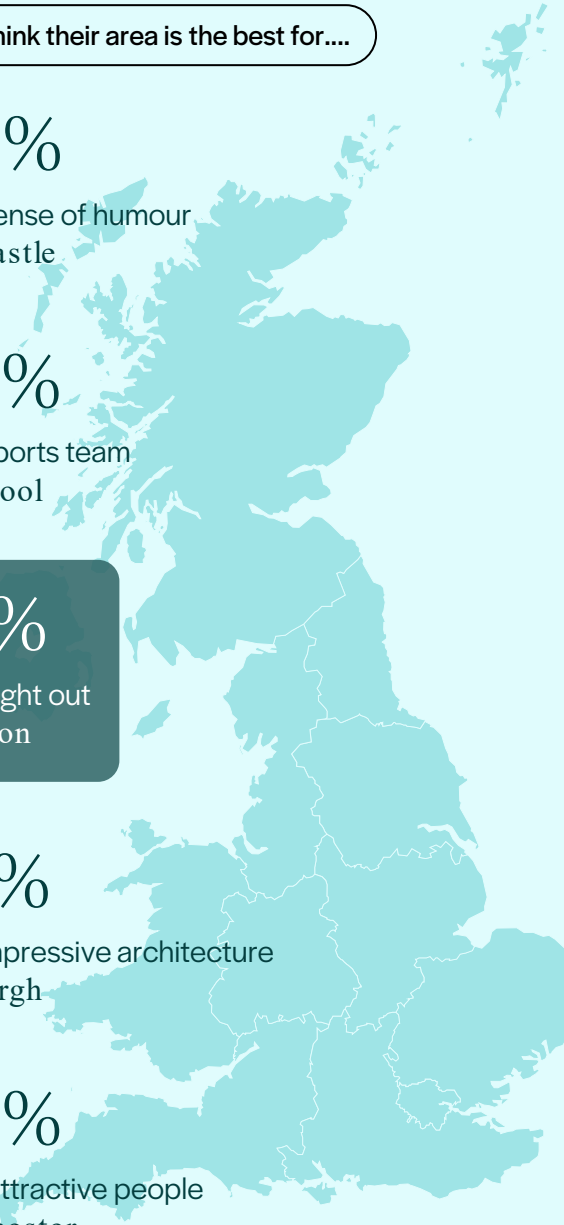
Best night out
Brighton

46%

Most impressive architecture
Edinburgh

44%

Most attractive people
Manchester





Alex & Luke, 60 & 26

📍 Forest Hill, London

In a city as fast-paced and as ever-evolving as London, we wanted to meet someone who had been a part of their local community for a while... someone who plays the role at the heart of a community. What could be better than the local dry cleaners?

Alex lives in Norbury, but works in Forest Hill, running a local dry cleaning shop with his son. His shop is a hive of activity, his friends sharing a coffee each morning in the store with him. He loves London — certain elements of it — yet sees Forest Hill as its own village, away from the “big city” of London. During his 35 years of running the shop, others around him have come and gone, and some locals treat him as the ‘in the know’ person who knows what’s going on. In truth, he’s as much an observer to London’s rampant progression as everyone else...

“

You’ve got people who know you, so you feel you belong. You get out of your car and straight away someone says ‘good morning’. I tell you, my dad actually retired in 2002 and he was a strong character. Everyone still asks about him.



Going for Growth

How can your brand be a bringer of hope to areas that are feeling left behind? What can it do to reflect and amplify the energy of places that are feeling ambitious and going for growth? The first step is to get a good read on a region's hopes, fears, and for the place they call home. What's cool for Cardiff might be un-cool for Cwmbran.

A yw hynny'n gwneud synnw?



Going for Growth

Northern ambition grows

Financial health and aspiration don't always align in the UK, suggesting that personal wealth and government funding are not the only drivers in creating thriving, ambitious communities. In fact, some areas may have all the right financial investment in place, but locals still feel their area is struggling.

While London remains the UK's economic powerhouse, the landscape is shifting. The North West is emerging as a strong contender for growth, with high levels of financial positivity, ambition and resilience. Initiatives like the "Great North" scheme, launched in 2024, demonstrate a proactive approach to the future. This new partnership of northern mayors and leaders aims to create opportunities across the regions, focusing on trade, innovation, net-zero and transport.

With its strong future-focused mindset, we can expect to continue to see growth across the North and changing power dynamics across the UK.

“

Liverpool as a place has had some real challenges over the years ... a lot of that informs the nature of the people here...and I think that period is absolutely essential to understanding the mindset of Scousers now, they feel like they have to look out for one another.

**Liam Thorp - Political Editor,
Liverpool Echo**



Financial positivity is concentrated in cities

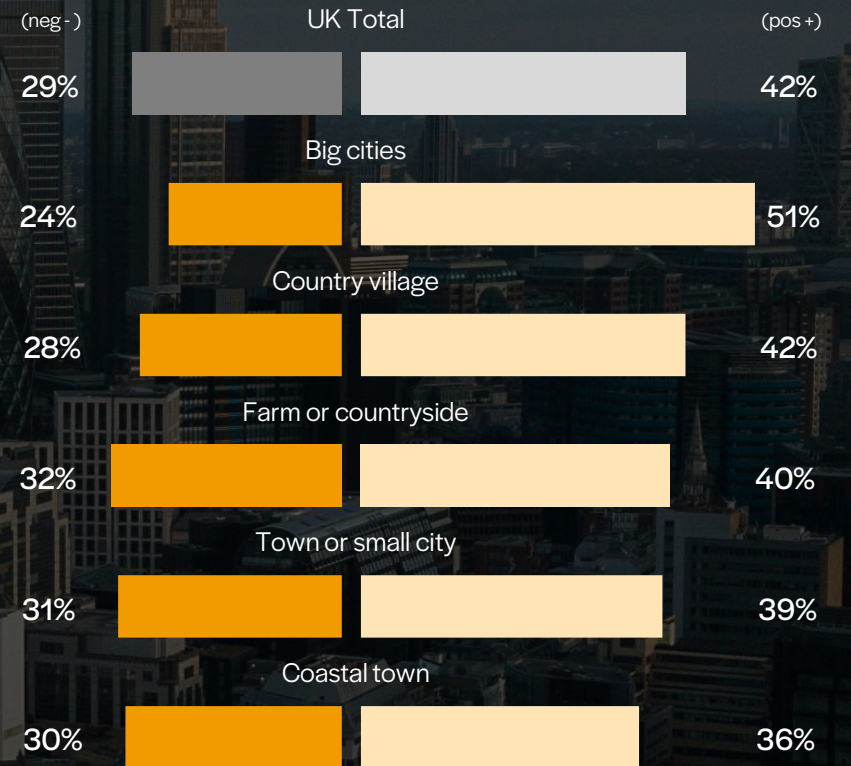
Across the UK only 4 in 10 (42%) people have a positive outlook around their personal finances, with large parts of the UK feeling down about their situation.

Any sense of positivity is largely concentrated in major cities, with Manchester and London the most optimistic.

This high level of financial negativity is driven more by towns and coastal areas. These locations are equally likely to be negative about their longer-term outlook, with only 36% of people who live there describing themselves as positive about their plans, goals and ambitions over the next 5 years.

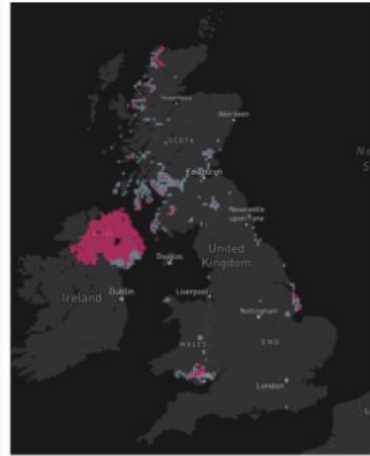
Out of all the regions, residents of the South East, despite higher income levels and a recognition of greater personal wealth, are the least positive about their financial circumstances. High house prices, rising commuting costs and general cost of living have left locals feeling that they are struggling when it comes to money. In comparison, people in Northern Ireland and the North East are feeling much more positive about their personal finances, despite real wealth levels being lower.

Feelings towards personal finances



UK Income

Wealth distribution across the UK and financial positivity don't always align



Lowest Income – Bottom 10%



Very Low Income – 10 - 20%



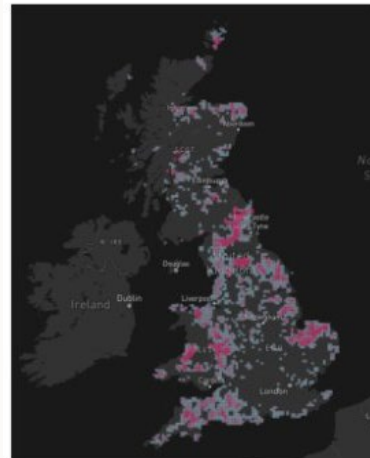
Low Income – 20 - 30%



Below Average Income – 30 - 40%



Slightly Below Average Income – 40 - 50%



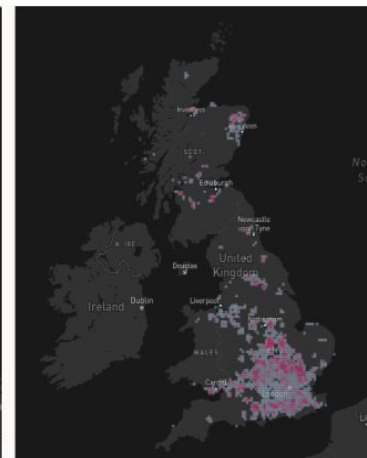
Average Income – 50 - 60%



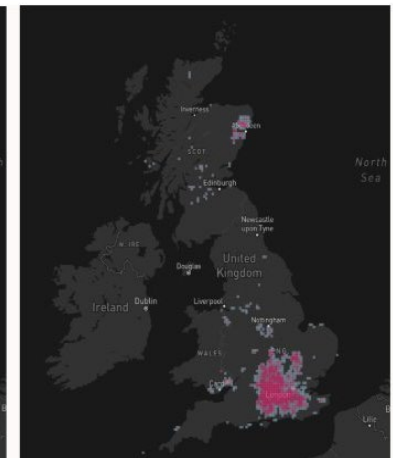
Slightly Above Average Income – 60 -70%



Above Average Income – 70 - 80%



High Income – 80 - 90%



Very High Income – Top 10%

Feeling ignored and unloved

Whatever people feel about their finances at a personal level, when it comes to their local area there is a near universal perspective that their region has been neglected economically and politically.

Government is perceived as not considering their locations when making decisions, and there are high levels of concern about the lack of investment by government and big business. Farming and coastal communities are especially affected, believing they are last in line for financial support and intervention.

There are slightly more positive views around the diversity of the local economy and financial health of individuals. However, this is mainly driven by London and Manchester.

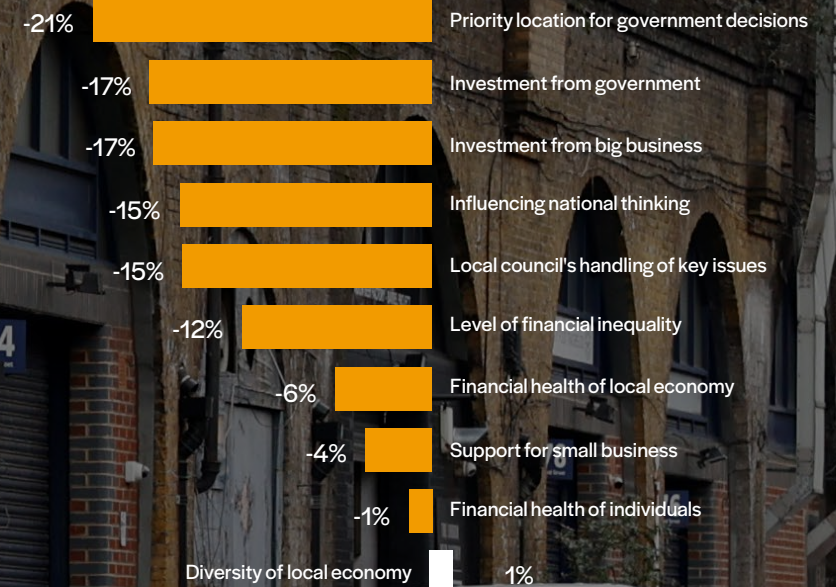
Other city locations, such as Liverpool, Belfast and Newcastle, feel they are at the back of the queue when it comes to financial support.

Countering this feeling of abandonment is a sense of self-reliance across the UK, with 4 in 10 people reporting that their local areas are taking the initiative to improve their own situation rather than waiting for government intervention. This attitude of “solve it myself” is even more pronounced in cities and farming communities.

How your local area is doing compared to the rest of the UK

Worse than other locations

Better than other locations



43%

My local area is at the back of the queue when it comes to financial support

Coastal towns

52%

Farm or countryside

44%

40%

My area takes initiative to improve local life, rather than waiting for government action

Big cities

51%

Farm or countryside

50%

39%

As a result of the last few years my local area is feeling run down and unloved

Coastal towns

43%

Country village

26%

C10. How does your local area compare to the rest of the UK on the following factors...C13. To what extent do you agree or disagree with the following statements about your local area? (Any agree) Base n=10,107

Greater London is the only region that does not feel neglected

Greater London is the only region that feels positive around political and economic investment, with all other regions in the UK feeling that they are at a disadvantage.

Even in the South East where there is some positivity, this is predominately driven by personal wealth, rather than government and business interest.

The North East and Wales perceive themselves as being the most overlooked. For the North East, not feeling they are contributing to UK economy and financial inequality are more likely to be concerns. Whereas for Wales, they are more likely to feel abandoned when it comes to the financial health of the local economy and investment from big business.

“ I'm getting really annoyed because they keep closing all the shops right in our town, but then just leaving it shut. I'm like, okay, if you're going to take it away, what are you going to replace it with? ”

18-24, Female, Middlesbrough

Feel most overlooked

Feel least overlooked



C10. How does your local area compare to the rest of the UK on the following factors... Base n=10,107

A wide range of local concerns

Across the UK, people are most concerned about lack of access to healthcare and the NHS in their local area – a concern that was rated number 1 across 9 of the 12 regions surveyed and an especially high priority in areas with older communities. The ongoing housing crisis is also of concern, especially across the South and South West. And people are worried about crime levels, particularly in city locations.

There are variations in the levels of concern across the regions. In the North East, for example, crime and feeling safe are the most prevalent issues. For Wales, it's about longer-term prospects and state of the local council. In the East of England, they are more likely to be concerned about traffic and transport connectivity – an issue that came through strongly as a barrier to growth and opportunity in qualitative interviews.

Coastal communities expressed the most severe concerns for their local area – from job opportunities to substance abuse in the community to longer-term economic prospects – for these types of locations, the future feels bleak.

“

All of the money here gets put into tourism, which sure is a great idea but there comes a point where you need to put it into the people that are actually living here.

18-24, Non-binary, Blackpool

Top concerns in your local area

1

Access to healthcare
1.3x Northern Ireland

2

Housing and house prices
1.3x South West

3

Crime levels
1.5x North East

4

Traffic and parking
1.4x East of England

5

State of local high street
1.2x Scotland

6

Immigration
1.3x North West

7

State of local council
1.6x Wales

8

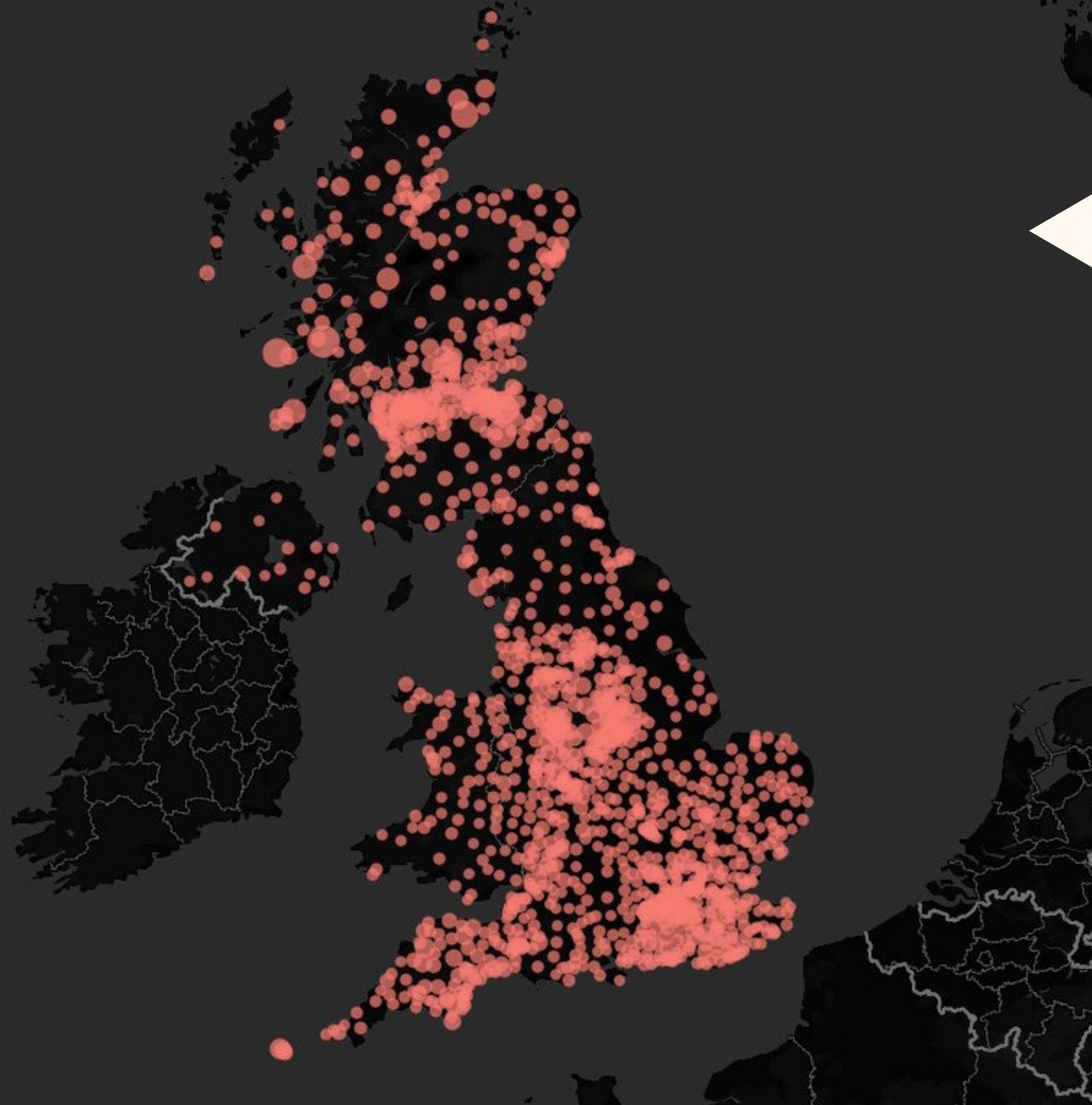
Job opportunities
1.3x Greater London

9

Feeling safe
1.5x North East

10

Transport connections
1.4x East of England



Areas in the North, South and South West over-index for searches related to potholes

Captify onsite search network – Jan to Dec '24 – Over-indexing postcodes for pothole and road repair search

Local pride encourages aspiration and resilience to flourish

Strong personal finances and economic investment in a region are incredibly useful, but they are not the final word — ambition and resilience can still flourish without them. While London might be expected to be the UK's top city based on economic indicators, others still outperform it in terms of more emotional dimensions.

Northern cities provide great examples of this get up and go attitude. Manchester is one of the most thriving cities in the UK, ranking significantly higher than London.

And, despite Liverpool residents describing themselves as currently only surviving, it is also one of the most resilient and ambitious cities going. Essential to this positivity are high levels of local pride and local identity, helping build a sense of determination and persistence.

In contrast, cities in the Midlands are struggling. The East Midlands, in particular, suffers from lower levels of ambition, lower resilience and a feeling of being rundown. This, coupled with a weaker sense of local identity and local pride, has led to lower levels of life satisfaction.

Most resilient

Liverpool
Leeds
Manchester
Glasgow
London

Most thriving

Edinburgh
Bristol
Manchester

Most ambitious

Edinburgh
Belfast
Manchester
Leeds
Liverpool

“

I think if you're from Liverpool or Cardiff, I feel like they have a much stronger identity. I wouldn't say people are ashamed to be from here (Midlands), but I think the fact that the Midlands has sort of been forgotten as a region gives it a weaker identity.

**Natalie Fahy - Senior Editor,
Nottinghamshire & Lincolnshire Live**

Looking to the future vs Looking to the past

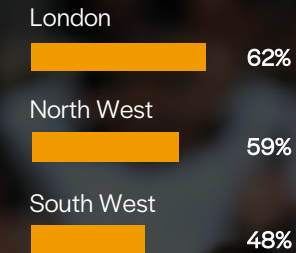
Focusing on the future rather than the past can significantly contribute to that sense of ambition and drive, and this is a challenge that some regions are trying to square. The North has historically been strongly associated with its industrial legacy and manufacturing past, a factor that still generates a strong sense of pride in regions such as the North East and Yorkshire.

But this heritage can cause issues, with 43% of those living in the North East, for example, concerned that their region has struggled to adapt since the decline in its historical purpose. Similarly, nearly half (48%) of those in Yorkshire agree that the skills and traditions of the past are no longer valued.

A more future-forward mindset that is ready to embrace change is emerging in the North West. Nearly 6 in 10 in this region describe the area as being future-focused, and there is a sense of a new identity emerging, one that is less linked to the past purpose of the region. In contrast, the South West and the Midlands lack this forward-thinking energy, with only 36% of people in the South West describing the region as embracing change.

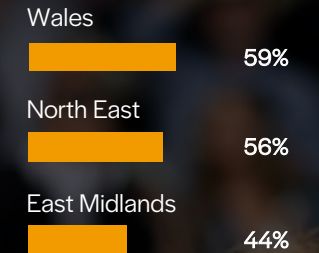
54%

My local area is future-focused



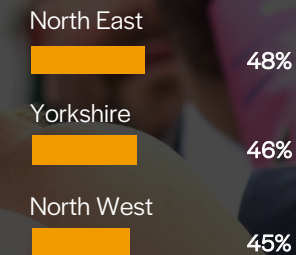
49%

I am very proud of my area's history



42%

The past purpose of my local area is increasingly irrelevant today





Marco, 48

📍 Aberdeen

Called the ‘beating heart of the economy’ by the government, small businesses are an integral part of British culture and a key barometer on the economy and financial resilience.

Marco runs a well-regarded local Italian restaurant on the outskirts of Aberdeen. His dad first opened it in 1978, and he’s been Manager for fifteen years. Well-known in the local business community, he talks fondly of trying to buy supplies locally and trying to keep as much money in the local areas as possible — albeit with some ingredients needing to come from specific parts of Italy. We talk of the recent budget and he’s expecting to see an impact, as we discuss whether this is the “highest tax burden” we’ve ever had in the UK, stating simply and plainly “we need to generate a lot of money to make any money at all.”

“

I think Aberdonians are very determined. They've also been very, very entrepreneurial, I think shipping was one of the first ones, and then obviously the fishing industry, oil and gas was a huge thing, I don't think many other parts of Scotland or the UK have quite experienced what the oil industry did to such a small city.

Beyond Britishness



Stiff upper lip, Morris Dancing, afternoon tea – time to go beyond tropes and delve into what really constitutes a common idea of Britishness in 2025. For brands wanting to appeal to our sense of Britishness – a strong but sometimes ephemeral sense of being part of something bigger than the country we live in – this is where insight begins.

Shaping

The Nation

A United Kingdom?



The Welsh feel Welsh, the Scottish feel Scottish, the English feel... well... it's complicated. The English identity seems to be something no-one can really agree on. With a nation of such fractured elements, what does it actually mean to be British?

As a collective of separate national identities, it is hard to find the areas that unite us as a country. The UK feels pulled apart in so many directions, from North to South, in discussions of class or race, sectarianism and the divisions that follow independence.

With so many hooks pulling them apart, it feels like people are searching to find the things that connect them to others, but when everyone is looking in different directions, how can the nations really be a united kingdom?

“

I see the British identity as a bit more inclusive. Unfortunately, some people who identify very strongly as English can go with quite a nationalistic identity.

18-24, Female, Eardisland

The trouble with being English

How does being English fit into the wider definition of being British?

Rather than a single take on it that everyone can sign up to and agree on, our study found evidence of multiple strong regional identities, but ones that don't quite ladder up into an overall patchwork of Englishness. And with a national anthem that celebrates God and monarchy rather than land, country and people, it is little surprise that the English identity is feeling untethered.

Age plays an important role in how we feel. Younger age groups are least connected to the idea of Englishness, preferring to think of themselves as British. Just over a third of Gen Z (36%) and Millennials (35%) in England use it as their main descriptor compared to just under half of Baby Boomers (43%) and the Silent Generation (45%). However, on a more positive note, for those younger generations, while Englishness feels closed off and only assigned to certain people, Britishness is a much more open-minded and tolerant concept.

There are areas across the country with a strong regional identity; this can be rooted in historical tradition and preservation of culture as in places like Devon, created from a culture that isn't pulled into the wider orbit of big cities like Essex, or forged through hardship and struggle as in Newcastle. In these places, Englishness takes a back seat behind the badge of regional pride.

“

I'd say British more than English for me. I feel like if you're British, you're accepting and you're tolerant of everything else.

18-24, Male, Huddersfield

“

There's this kind of phrase that gets used sometimes, which is Scouse, not English.

Liam Thorp - Political Editor, Liverpool Echo

The Celtic ties that bind us

Across the wider United Kingdom, being British is relegated to a low second place by the strength of national identity within Scotland, Wales and Northern Ireland.

Unity and pride shine through in their national anthems, with *Hen Wlad Fy Nhadau* and *Flower of Scotland* in celebratory sharp contrast to *God Save the King*.

Across England, British values typically stir up points of regional pride. However, when asked to describe British values, the other home nations default to 'traditional' English values such as a stiff upper lip (42%), love of the monarchy (45%) and queueing (47%). When asked about values for their own nation, there is a much clearer sense of national identity coming through. For Scotland, national pride (65%) and not taking yourself too seriously (60%) come out top, the Welsh align with national pride (66%) and a love of nature and the outdoors (64%) and for Northern Ireland it is not taking yourself too seriously (45%) and community spirit (52%).

When will we see
Your like again,
That fought and died for
Your wee bit hill and glen

- Flower of Scotland

The old country of my fathers is dear to me
Mae hen wlad fy nhadau yn annwyl i mi

A land of poets and singers, famous
celebrities *Gwlad beirdd a chantorion,*
enwogion o fri

- Hen Wlad Fy Nhadau

E2. Which best describes the way you think of yourself? Base n=10,107

What is the main way you would describe yourself ?



63%
Scottish



50%
Welsh



39%
English



52%
Northern Irish /Irish

Preservation of cultural heritage

Scotland, Wales and Northern Ireland all have a strong sense of connection to their rich cultural and historical heritage, and this has helped to reinforce those feelings of national pride and that they will fight to preserve. It is particularly the case amongst younger groups, who are embracing the Celtic languages as a way to explore their national identities and to continue tradition.

For Northern Ireland in particular, their complicated and troubled history has led to a greater sense of community and pride in their identity which feels hard-won, but that the nation is working hard to protect.

In Scotland, while there is not a united consensus on what the outcome should be, the conversations that surround devolution and independence have created channels for the country to work through the different areas of their nationalism and what it means to be Scottish and British. While in England, the discourse around Brexit has left a sour taste in people's mouths and created a narrow view of who can be English. In Scotland, the definition of who can be Scottish feels much wider and more accepting.



“

The Irish language is starting to have a resurgence in Ireland. And it's great that Irish speaking centres exist, being able to be part of that community, people using the Irish language and trying to learn it that wee bit more is very cool.

18-24, Female, Belfast

“

Everybody in Scotland has been through the arguments, whether it was with their own family or their own friends or their own street, because we had the referendum on independence, we had devolution. We have been through that thought process of what is Britishness? What is Scottishness? In a way that I think the English haven't.

45-54, Male, Kelso

“

You often hear people say that anyone can become a Glaswegian. There's a mural in the city centre that says, 'People Make Glasgow.' There's a common understanding that you don't need to be born in Scotland to have a link to the community.

25-34, Female, Glasgow

A muddle of Britishness

Amongst the complexity of Britishness, a shared concept of British values gets lost but regional nuance gives insight into the differing points of pride across the nation. For the East of England this is national pride (i114), in the South West it is more about a love of nature and the outdoors (i115) and in the North East it's a love of animals (i116).

The values we associate with being British also change with age, becoming more traditional amongst older generations. For Gen Z and Millennials, it's all about excitement and adventure (25%), Gen X associate with a dry sense of humour (41%), Baby Boomers chose a stiff upper lip (52%) and the Silent Generation side with democracy (59%).

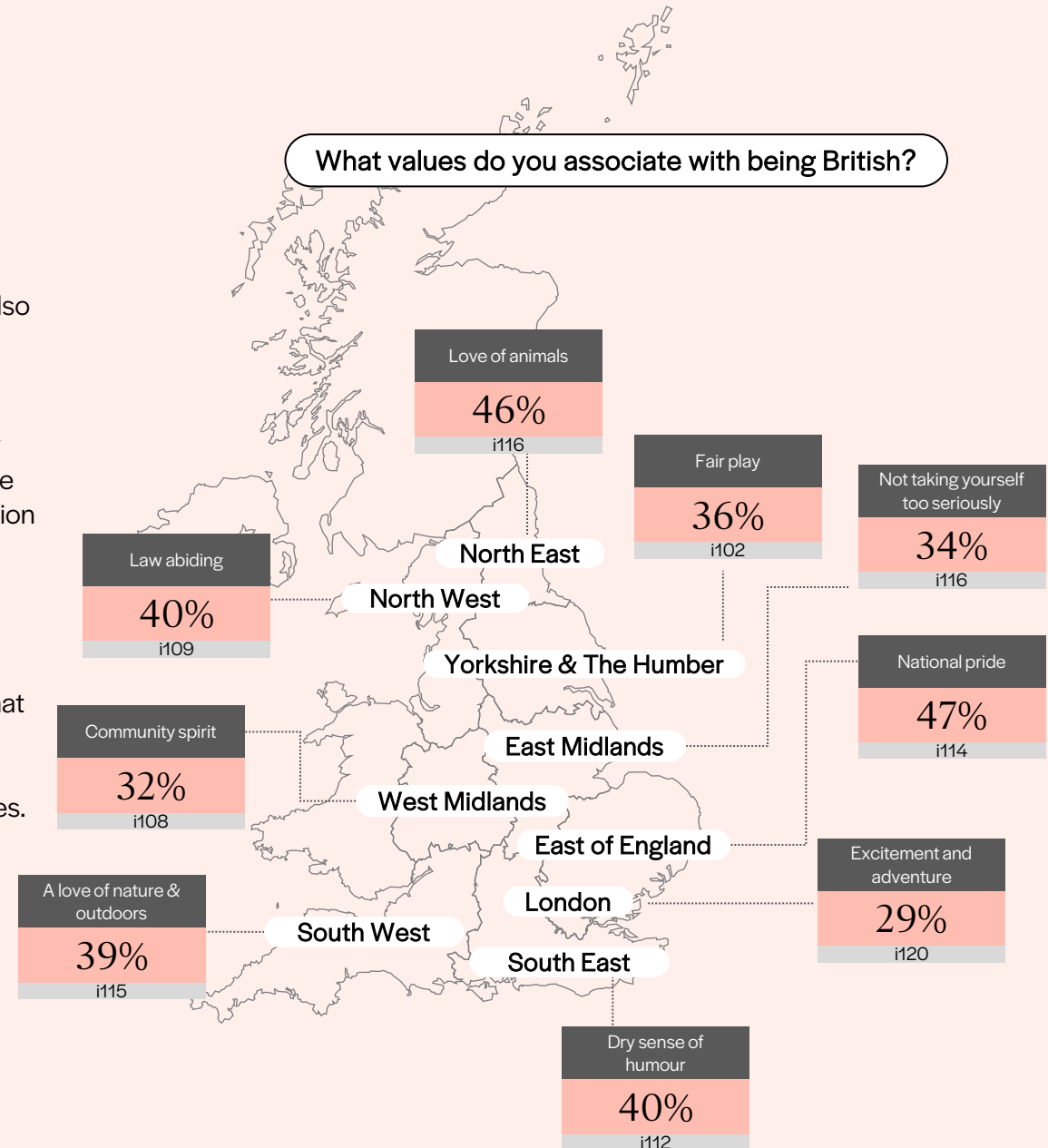
When asking the English about their values, they feel archaic and traditional with love of monarchy (i129), stiff upper lip (i124) and queuing (i118). Without a set of the values that feel representative of modern England, it is unsurprising that people revert to their local pride when thinking about wider British values.

“

I don't know what Britishness is anymore... That's an impossible question to answer these days... Relating, enjoying, experiencing, wanting to understand the history. For me, Britishness is history.

45-54, Female, Southwold

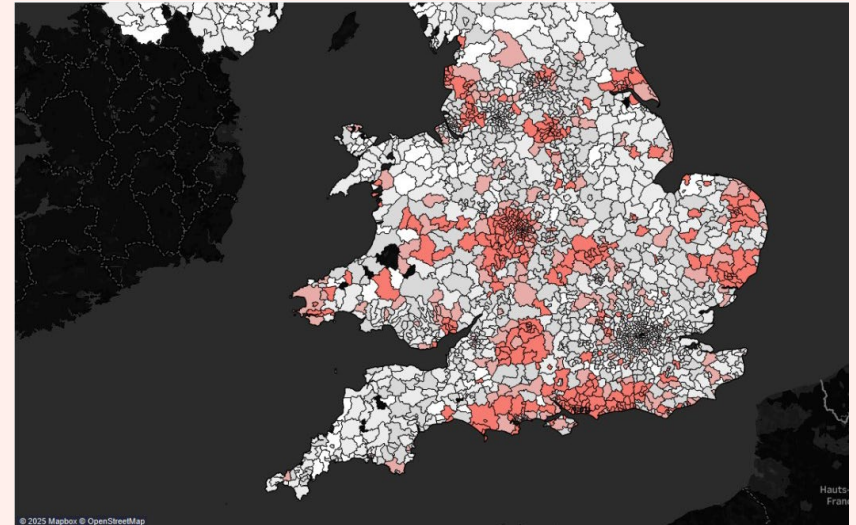
What values do you associate with being British?



How love of the monarchy is expressed across England and Wales

The Queen's Platinum Jubilee viewing patterns
High-indexing locations

Source: Sky viewing panel; Sky households; TVR index for Sky homes by region vs. all Sky homes for viewing to the Queen's Platinum Jubilee on BBC1 (4th June 2022)



Royal events – street party licenses
Search activity

Captify onsite search network – May 5th to May 7th 2023 – Top-indexing postcode sectors for street party searches during the Royal Coronation

Diversity or Dilution

For many in the UK, the diversity and multiculturalism that has been fostered is to be celebrated, but there are rapidly growing pockets of England who see it as something much more dangerous. Over the past year, support for the Reform party has grown and is particularly strong amongst older generations with 36%* of over 65s considering voting for the party in the next election, compared to 14%* of under 24s. The reality behind this growth is that areas of the country fear for the strength of Britishness and blame integration of different cultures for diluting the nation's sense of identity.

In contrast to this, there is a feeling amongst those with roots in other countries of becoming British in their own way. In a balance between not feeling accepted by the country they grew up in but not feeling fully connected to their origin culture, finding a place to connect to the diaspora in different ways is creating a third culture and a way to celebrate their ancestral roots. Whether this is through food, music or religion; finding ways to connect to cultural heritage strengthens self-identity and the idea of what it means to be British in the modern day.

“

It's the multiculturalism that's basically eroded British values, I mean, what's British to me? Roast beef on a Sunday, going to the pub to watch football, being able to say what you think, not having a mosque on every corner. I mean, London isn't England anymore...

35-44, Male, St Albans

“

My mother tongue is Punjabi, and my parents to this day, they still speak broken English. When I come home, I turn into that Pakistani Muslim. And even though, outside, I'm a British Pakistani Muslim that can do all these things but when I'm at home, I just feel like a normal Pakistani lad for my parents.

18-24, Male, Huddersfield

“

And it might sound very small and minute but just going to [Moss Side], going to a Caribbean shop, going to buy some seasoning or some meat or going past their hair shop and smelling the hair products—those little things—those smells and those sites without even noticing you're getting a wave and a rush of like this feels like home away from home.

25-34, Male, Manchester



Nadia & Mira, 30 & 59

📍 Doncaster

“England will still be England, an everlasting animal stretching into the future and the past, and, like all living things, having the power to change out of recognition and yet remain the same” wrote Orwell in his essay ‘England Your England’... but what of Britishness? What does Britishness mean in 2025?

Nadia has lived in Doncaster since 2001, when her parents moved from Pakistan, after a short duration in London. A family friend told them Doncaster was “nice, quiet and open” and she used local libraries to settle into the local area — libraries still being places she finds peace and space in. When asked if she regards herself as Pakistani or British she replies “a bit of a mix” and her mother agrees, when they see the ‘Welcome to Doncaster’ sign they feel they are at home.

“

When I first came, I was a Pakistani. Then I became... British... and then I became a Doncaster member...

Neighbourhood Narratives



Whether you refer to them as Jiran, Shachen, 'er-next-door or the neebs – the opinions of our neighbours, and the neighbourhood we live in, matter. A word-of-mouth recommendation from those who live around us carries special weight. Brands can tap into the power of this valuable currency but first they need to get to know the needs. Here's a great place to start.

Shaping
The Nation

Decoding neighbourliness



Neighbourliness.

It seems like a simple concept, but can actually be a complex web of interactions, influences, and trust. To understand it better, we've developed a framework called the "neighbourly index".

The neighbourly index measures the strength of neighbourly ties, combining four factors: interaction, influence, trust, and community size. Together, these elements provide a comprehensive assessment of neighbourliness, indicating the overall connectedness and social capital within a given area.

“

I can walk around the village and I know people, there's a community place where a lad's trying to set up a coffee shop .. It's all about that, isn't it? Helping each other and being supportive.

55-64, Female, Whitchurch

C15. Thinking about your neighbours and local community, how much do you... C17. How many of your neighbours / people in your local community would you consider to be friends or close acquaintances? C18. To what extent do you agree or disagree with the following statements about your neighbours? Base n=10,107

Interaction (in-person + online)

Influence (discuss local matters + rely on neighbours for info)

Trust (I trust my neighbours)

Circle size

Neighbourly index

Neighbours – connection or convenience?

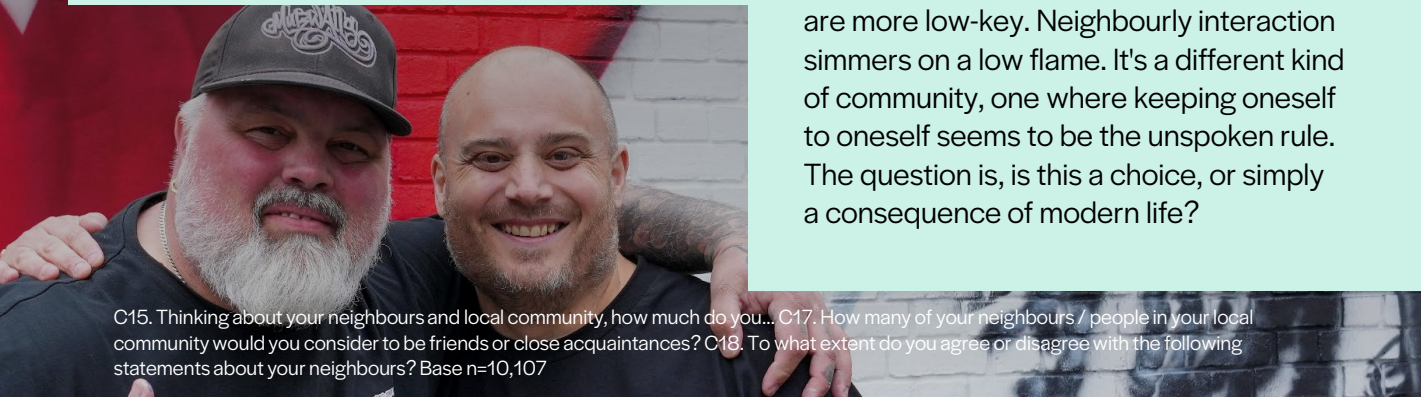
Top of the neighbourliness charts, Londoners seem to have cracked the code of urban co-existence. But scratch beneath the surface and it's... complicated.

While interaction certainly thrives in the capital, trust? Not so much.

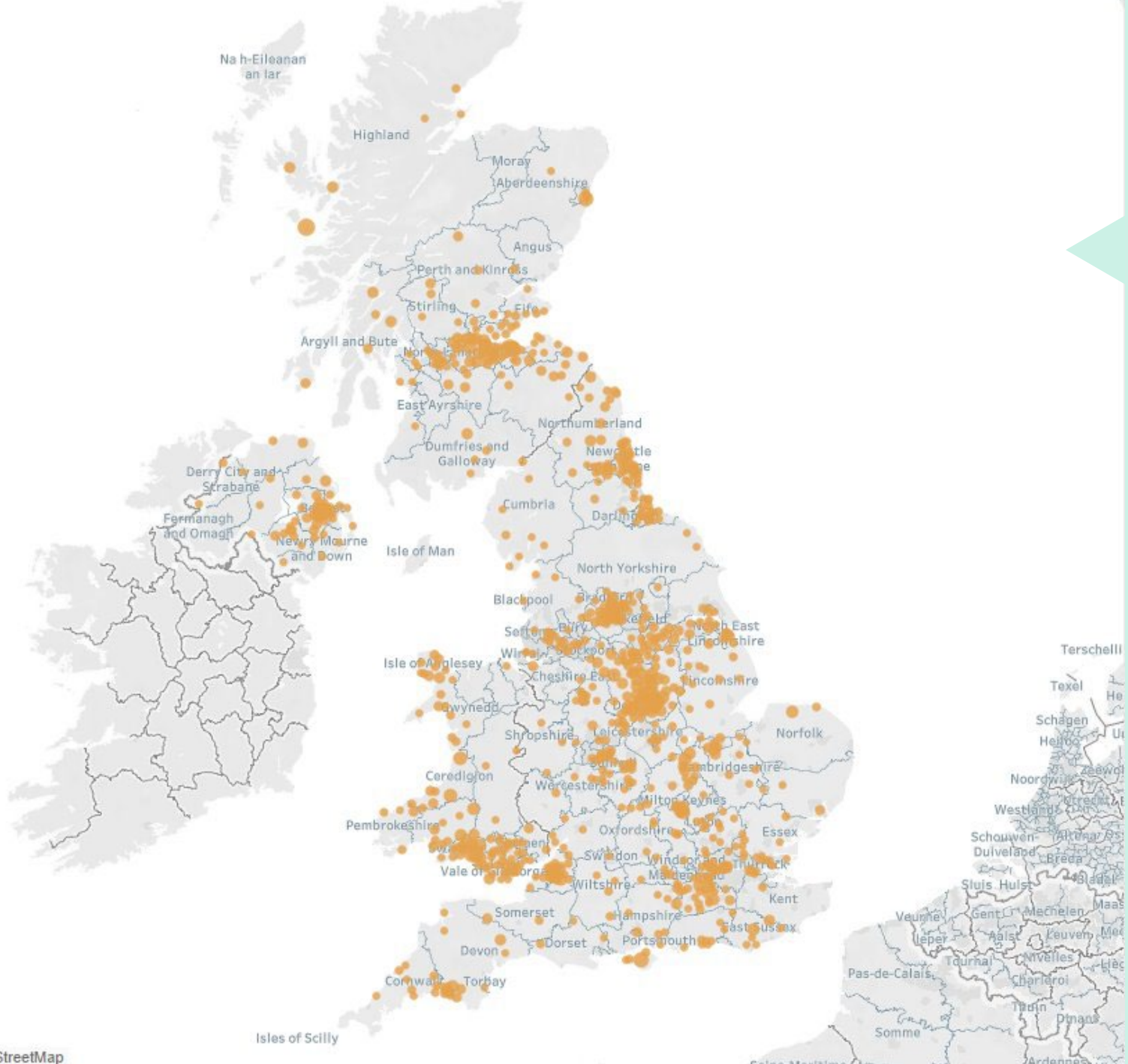
It's a neighbourliness of convenience and proximity, perhaps, rather than deep connection.

Meanwhile, over in Wales and Northern Ireland, a different story unfolds. They might not exchange greetings quite as often as their London counterparts, but the bonds run deeper. Trust is the bedrock of these communities, a quiet understanding that neighbours are there for each other, not just for a quick cuppa. In Northern Ireland, the social circles are a little wider too, hinting at a more expansive sense of belonging. Little surprise that in this location a strong sense of community is mentioned by 1 in 5 as an important criteria when selecting an area to live in.

Moving further South, in the East Midlands, South East, and South West, connections are more low-key. Neighbourly interaction simmers on a low flame. It's a different kind of community, one where keeping oneself to oneself seems to be the unspoken rule. The question is, is this a choice, or simply a consequence of modern life?



Community-related activity across the UK



Captify onsite search network – Jan to Dec '24 – Postcodes that over-index for search around community outlets and organisations

More than small talk

Need a recommendation for a new restaurant? Ask your neighbour. Wondering about the best local dry cleaner? Your neighbour probably knows.

When it comes to the everyday practicalities of life, it seems we're more than happy to lean on those who live closest to us. Local planning applications? Definitely a topic for neighbourly debate. But step into the realm of the personal – health, family, big purchases – and the neighbourly influence does fade for some audiences. These are choices we can guard more closely, it seems, preferring to navigate them within our own private spheres.

Age plays a big part. Younger generations, such as Generation Z and Millennials are all in. They're chatting, sharing, comparing notes on everything from the best local coffee to relationship dilemmas. Their neighbourly networks are buzzing, a vital source of information and connection in a fast-paced world.

The older generations, those aged 55 and above, tell a different story, with Baby Boomers especially closed. For them, neighbourly discussions are more selective, more contained. Major purchases? Family matters? These are handled in-house, thank you very much. It's not a lack of connection, perhaps, but a different kind of connection, one built on established routines and fierce independence.

The topics we discuss with our neighbours

Most discussed

Where to shop or eat in the local area

Local issues

Social activities

Hiring local contractors or services

Community initiatives

Health & wellbeing

Family matters

Home décor or exterior choices

Purchasing decisions

Least discussed

Beyond the postcode

However, community isn't always defined by postcode. For some, particularly within minority ethnic groups like the Black, Black British, Caribbean or African community and the South Asian British community, shared cultural heritage holds greater significance than neighbourly proximity.

This highlights the vital role of "third spaces" – community centres, cultural events, and places of worship – that provide opportunities to connect with others who share similar backgrounds and traditions. These spaces become hubs for celebrating heritage, fostering a sense of belonging, and strengthening bonds that transcend the confines of the neighbourhood. For these communities, it's less about watering the plants when someone is away and more about connecting over shared experiences, such as parenthood, and preserving cultural identities.

However, a worrying trend is emerging and one that is hitting younger age groups hard: the loss of these vital third spaces. Across the country, young people in cities, rural areas, and towns alike are feeling increasingly isolated due to a lack of places to connect, build friendships, and explore their identities. This absence contributes to weaker social cohesion and a decline in active citizenship. Conversely, communities that retain and nurture these spaces are encouraging thriving cultural ecosystems – London, with its vibrant mosaic of ethnic enclaves, is a prime example.

“

I started going to the Sikh temple, the Gurdwara, more regularly. You underestimate the presence of so many people who share the same beliefs and culture in one place at one time...engaging with that is really, really nice.

25-34, Female, Glasgow

The community of people that I identify with is more important to me than the community of people who live close by

Mixed or Other

39%

East or South East Asian British

39%

Black, Black British, Caribbean or African

43%

South Asian / South Asian British

42%

White

34%

“

West London does bridge the gap between race and class and interest. There's a tonne of community centres... grassroots-funded that you can go to... there'll be something... food... people for you to talk to and you can find your place.

35-44, Female, London

C18. To what extent do you agree or disagree with the following statements about your neighbours?
Base n=10,107

Fewer public buildings translate directly into fewer opportunities for young people to connect, build relationships, and engage with their communities

“

There's the collective creative hub in Cardiff, they do stuff as well for the community to like, just open the door for people, which I think is the best part, because if you can't walk through the door, you can't get to where you want to get to.

18-24, Female, Cardiff

“

We've been going to the cinema a lot. It's the only nice thing in this entire town, and they're closing it.

18-24, Female, Middlesbrough

Places with the highest number of public buildings

City	Number of public buildings	Population	Public buildings per capita
York	50	210,000	0,238
Cardiff	75	370,000	0.203
Cambridge	30	150,000	0.200
Newcastle	55	300,000	0.183
Edinburgh	100	550,000	0.182

Places with the lowest number of public buildings

Area	Number of public buildings	Population	Public buildings per capita
Stoke-on-Trent	9	255,833	0.035
Hull	10	260,200	0.038
Plymouth	12	262,100	0.045
Middlesbrough	8	174,700	0.045
Sunderland	15	277,962	0.054



Faith, 20

📍 Belfast

Faith lives in Shankill Road, a predominantly working-class Loyalist community in Belfast, Northern Ireland. She runs a group for women called “Not Just Us” and is also part of a small but growing pole dancing community in Belfast.

Faith is deeply connected to her local neighbourhood. On Shankill Road everyone knows each other. Every week, she goes to the same local café with her grandad, this has become their weekly ritual. Shankill is an intergenerational community, overcoming barriers and the past has made the local neighbourhood even more resilient and supportive.

“

I would say all the wee cafes, all the wee bakeries and the people that you always see everyday and have always lived on the Shankill their whole life, they are the people that represent community to me.



The Geography of Trust

Whether you want to call out Plymouth for being Pot Noodle fans or encourage Aberdonians to upgrade their pet insurance, media now enables you to go super-local and hyper-personal. From out-of-home to addressable TV to audio and print – we know messages can carry more weight with local audiences when they ‘come from’ the location in which they’re served.

Shaping
The Nation

Mapping credibility



Where we live often shapes how we see the world, and that includes the information sources we turn to and trust. The sources we rely on for news and wider understanding are influenced by our surroundings and the local context. From the news outlets we choose to follow, to the opinions we value from neighbours and friends, our geographical location exerts a powerful influence on our information ecosystem. This connection is often subtle, yet the role it plays in shaping our perspectives and beliefs is crucial.

Meanwhile, the very fabric of our communities will also influence the way we assess the credibility of information. Shared experiences, local perspectives on life and society, and the unique challenges faced by different regions all contribute to the development of distinct information landscapes.

The interpretation of these nuances is essential to successfully navigate the complex challenges of the modern media environment.

“

I've been listening to the same radio channel since I was able to listen. And, you know, there are very few people in Aberdeen who wouldn't be able to sing some of the radio jingles back to you if you asked.

18-24, Trans Man, Strachan

The trust divide

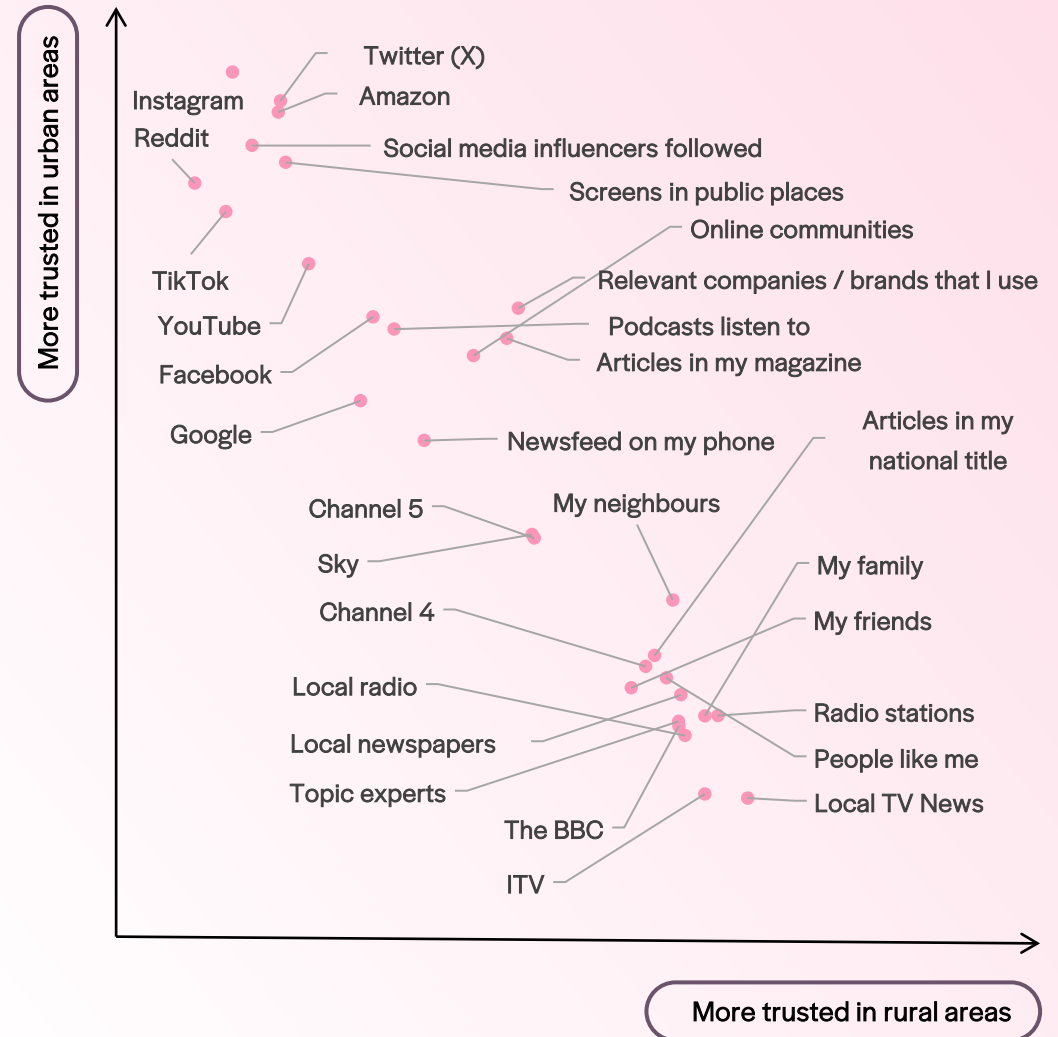
Where do we really put our faith when it comes to information?

The answer varies significantly depending on where you are. The data reveals a clear trend: big cities exhibit the widest circle of trust, with the highest number of trusted sources, while those in towns are the most sceptical, and the countryside falling somewhere in between. But it's not just about the quantity, it's the nature of those sources that paints a vivid portrait of each location's unique information landscape.

The digital divide? It's truly alive and well: while the likes of Google command one of the top trust ratings in urban areas, venture out to the countryside, and that number plummets, to a mere 15th on the list. And it's not just Google; wide-reaching platforms like Facebook, YouTube, and X (Twitter) all see their trust ratings take a nosedive as you head for the hills.

Is it a matter of spotty internet, a preference for the familiar, or just plain scepticism towards the online world?

Dig a little deeper, and the demographic make-up of these locations starts to tell a story about why this digital divide exists. Cities tend to be younger, and Gen Z and Millennials are much more likely to give digital sources, such as online communities and social media influencers a chance to influence their thinking. They also tend to spread their trust around a bit, even if they don't trust any one source as much. Meanwhile, rural areas are populated more by a higher number of Gen X and Baby Boomers, who tend to rely on a tighter selection of more established channels – TV, newspapers and radio channels of choice, experts – and trust them a lot.



Navigating the news

Across the board, it seems that many are increasingly tuning out of mainstream news – a behaviour that is even more extreme amongst younger cohorts. COVID, with its relentless stream of negativity, appears to have been a turning point, and there's a growing scepticism towards traditional media outlets, with some feeling they don't represent the interests of the average person. The BBC, in particular, faces a unique level of scrutiny, and whilst it is still the top trusted channel for many, this sentiment is driven increasingly by 55+ audiences. Younger age groups, and even some parts of the country such as the West Midlands, are more sceptical around the credibility it is seen to offer.

This mistrust is in part fuelled by the sheer number of channels vying for attention, each with its own perceived bias and agenda. For some, the media's perpetuation of stereotypes only reinforces their distrust, creating a sense that certain communities are being poorly represented – a point of contention for some regions including the East Midlands, the East and Scotland.

As one person put it, you have to "do your own homework" to navigate the "fake news" and find some semblance of truth. Instead, Gen Z, for example, are turning to social media pages or the trusted voices of their friends and family for information, seeking a more authentic and informal perspective.

“

I don't watch the news. I don't read a newspaper. I don't listen to what I see on Facebook. I get a lot of information via word of mouth.

25-34, Male, Middlesbrough

“

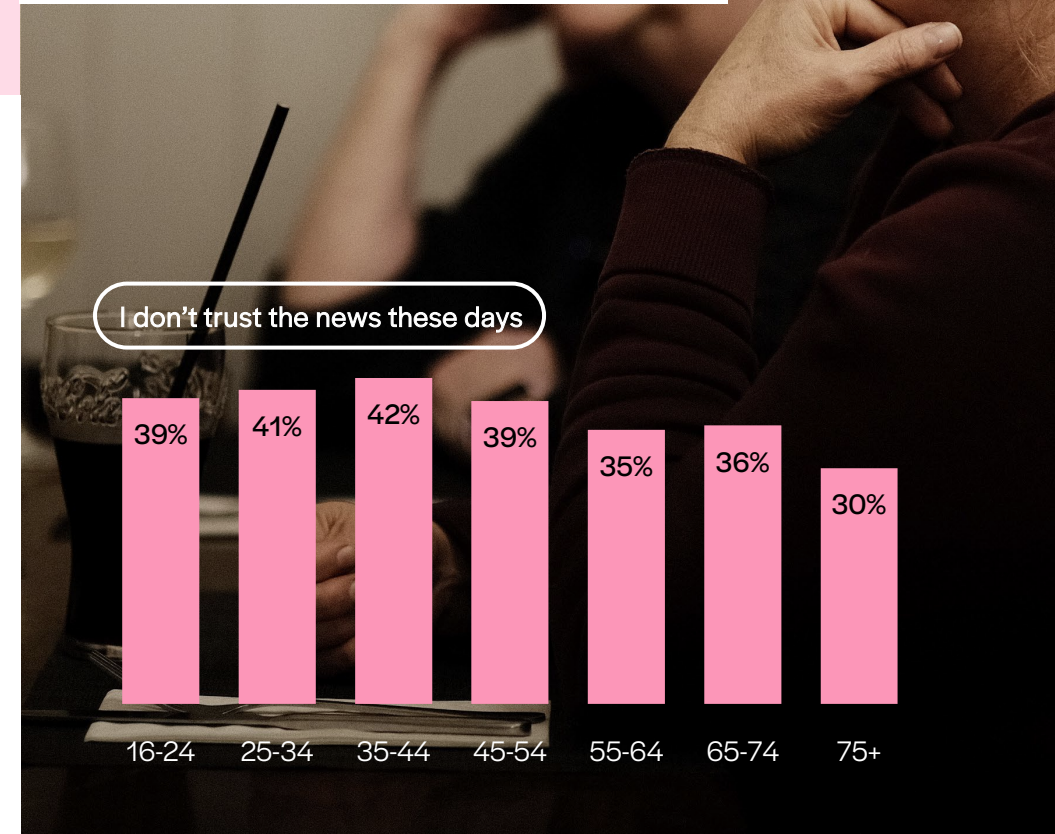
I've known for a long time that what you see online can entirely be falsified and faked. I'm not some conspiracy theorist, but there is absolute control over media.

18-24, Non-binary, Blackpool

“

I don't think I trust any [media channels]. To be honest, if I watch the news, I watch Channel 4 news. I just surf around, I guess, and try and see different viewpoints. It is important to not believe everything, and if you're interested, then look deeper.

35-44, Female, Tunbridge Wells



City signatures

While cities are more trusting overall, there isn't a single 'urban' mindset – when it comes to media, cities are anything but uniform.

Take the two urban giants, London and Manchester, for example. Both embrace digital sources, finding greater credibility in social media platforms than many other regions. However, Mancunians outshine Londoners when it comes to trusting influencers and the likes of TikTok, Instagram and Reddit, with the latter more likely to trust online communities.

Other northern cities like Liverpool, Newcastle, and Sheffield place a greater emphasis on personal connections and word of mouth.

These cities demonstrate higher trust in likeminded individuals, family, and friends, coming at the expense of trust in more traditional media channels. Meanwhile, over in the Midlands, cities like Birmingham and Nottingham show some of the highest indices for trusting YouTube and podcasts.

Then there are the capitals of Scotland and Northern Ireland. While also embracing a range of social platforms, Edinburgh shows a greater affinity for both national and local newspapers as well as their magazines of choice. Belfast, meanwhile, lets local voices take even more centre stage, placing more trust in local radio, local TV news and local community leaders.



The power of local

Head out of the city, and the power of local voices becomes even more amplified. A clear pattern emerges, demonstrating that as population density decreases, greater value is placed on information originating within people's immediate surroundings. For regions such as Wales, Northern Ireland and the North East, this sense of local relevance really matters to people's lives.

National TV might get a bit more love as you move into the countryside, but it's local TV that truly matters in smaller communities. It's not just a trusted source; it's *the* trusted source. Boasting an index of 130 compared to a below-average 76 in big cities, local TV cements its position as the most trusted source for information in rural parts of the country. Interestingly, this transcends demographics, with Gen Z and Millennials in these areas ranking local TV news much higher vs their counterparts in other locations.

Local radio and newspapers echo this trend, although to a lesser extent. While not reaching the same heights, they still maintain consistently higher trust levels in less populated locations. And the story doesn't end with media. In these more remote locales, personal connections are paramount. The power of family, friends, and neighbours as information sources skyrockets, revealing a world where trust is built on relationships, not algorithms.

“

Championing local media and local forms of creativity, local theatre, local radio, local podcasts really deserves a spotlight. Things that are happening across the UK and across Scotland are interesting, but also it's really interesting what's happening in your own community.

18-24, Trans Man, Strachan

Top trusted sources (by index) – country village / farm

Local TV News
130 (vs 176 in big cities)

Radio stations of choice
125 (vs 190 in big cities)

My family
123 (vs 190 in big cities)

Local radio
119 (vs 186 in big cities)

Local newspapers
119 (vs 193 in big cities)

TV
118 (vs 187 in big cities)



Diane, 58

📍 Middlesbrough

It was Nietzsche who said “I’m not upset that you lied to me, I’m upset that from now on I can’t believe you.” And never has that sentiment been more relevant than now in British culture, with trust in our institutions, politicians and news organisations being as low as they ever have been...

Diane is a palliative care nurse and has lived in the same area of Middlesbrough all her life, living in her current home for twelve years. The first home she bought was on a council estate just over the road and she’s observing its decline — with “badness” taking over. She keeps tabs on local news on Facebook groups but only trusts it if she can see and feel the news they’re reporting on. When we visit she puts GB News on and tells us this is the channel she trusts the most.

“

I particularly like [GB News] because [my husband] watches it ... I just think it's a little bit more truthful than the other channels. [My husband] hates the BBC at the moment, for whatever reasons, and again, he watches [GB News] because he thinks they tell the truth more.

Talk Bolton to Me




Tell a Brummie something's bostin and you'll probably get her interest. Tell her it's jolly good and she'll look through you. If it's clear you're not from someone's neck of the woods what you say to them can be distorted and lack resonance. How can understanding different people's lived experiences help reshape the stories your brand tells?

Shaping

The Nation

Talk Bolton to Me



An opportunity to connect, but currently missing the mark

The opportunity for brands to get more involved in local communities is significant, especially in locations that are feeling the local pride. In these areas, there is a ready desire for brands to help celebrate local culture, to make the community stronger, to give back to local causes.

But to do this successfully, local representation within advertising needs to improve. Current brand efforts can often miss the mark, relying too much on stereotypes and inauthentic interactions. This problem is particularly pronounced in Northern regions, with local audiences alienated by inaccurate storytelling and symbolism.

“

If you're going to represent a community, you need to be willing to listen to them, and you need to be willing to put your own voice aside if you're not from there. Watch and learn and engage with it, and don't make yourself the centre of the whatever you're doing.

18-24, Trans Man, Strachan

From discovery to connection

Whilst some can find advertising annoying, when it gets it right it can make a significant difference to how people feel about brands. Half (49%) the population agree they enjoy seeing creative and engaging advertising, rising to 6 in 10 in city locations, with London, Manchester and Bristol higher than most.

And those people who do enjoy ads are considerably more likely to use advertising for discovery, and to claim brand trust is an important criteria for them when choosing what to buy.

And irrespective of whether someone enjoys the ad or not, there is an expectation that brands should be doing more to connect with local communities, with only 1 in 10 saying brands had no role to play in the community. Local area support that would be welcomed includes improving education in city locations (London and the North East especially), encouraging physical health and wellbeing in coastal areas and providing or protecting green spaces within villages, an idea which also resonates well in the South East.

51%

Advertising helps me discover new products

58%



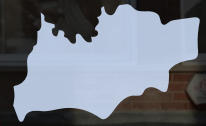
London

53%



North West

46%



South East

49%

I enjoy creative and engaging advertising

61%



London

56%



Northern Ireland

43%



East Midlands

1 in 3 feel their local area is not being represented at all

Whilst advertising as whole is positively received, many of us do not feel that our areas specifically are represented well within ads.

Across the UK, more than a third (35%) do not feel their location is seen at all, with only 6% feeling their location is well represented.

The positivity that does exist is driven by Londoners. However, even here, one in five still feel they do not see their spaces appearing in advertising. This is particularly true for those who live in less wealthy areas of the capital. Meanwhile negative sentiment is particularly strong in Wales, Scotland, Northern Ireland and the East Midlands, suggesting a significant disconnect between these regions and mainstream media portrayals.

Irrespective of location, younger generations are more positive about the topic with 38% of under 44s agreeing their local area is moderately or well represented vs only 16% of over 44s. The wider media diet amongst under 44s, coupled with a sense of stronger representation within cities, contributes to this different outlook.

Accents' representation further highlights disparities. Southern accents are the most widely recognised and perceived as dominant in media, with most other regions feeling significantly underrepresented.



G1. How well do you feel your local area is represented in advertising? F5. There are a wealth of accents across the United Kingdom. Which one is most represented in media?
Base n=10,107

Well represented

Greater London (14%)

West Midlands (8%)

East of England (7%)

Not at all represented

Wales (43%)

East Midlands (41%)

Scotland (40%)

Most represented accents in media

London (40%)

Received pronunciation (8%)

Home Counties (8%)

Favourite accent

London (15%)

Scottish (15%)

Yorkshire (8%)

Poor use of local references, with stereotypes the biggest issue

Only 1 in 5 people believe brands are effectively incorporating local references into their advertising, with this positivity driven more by city locations.

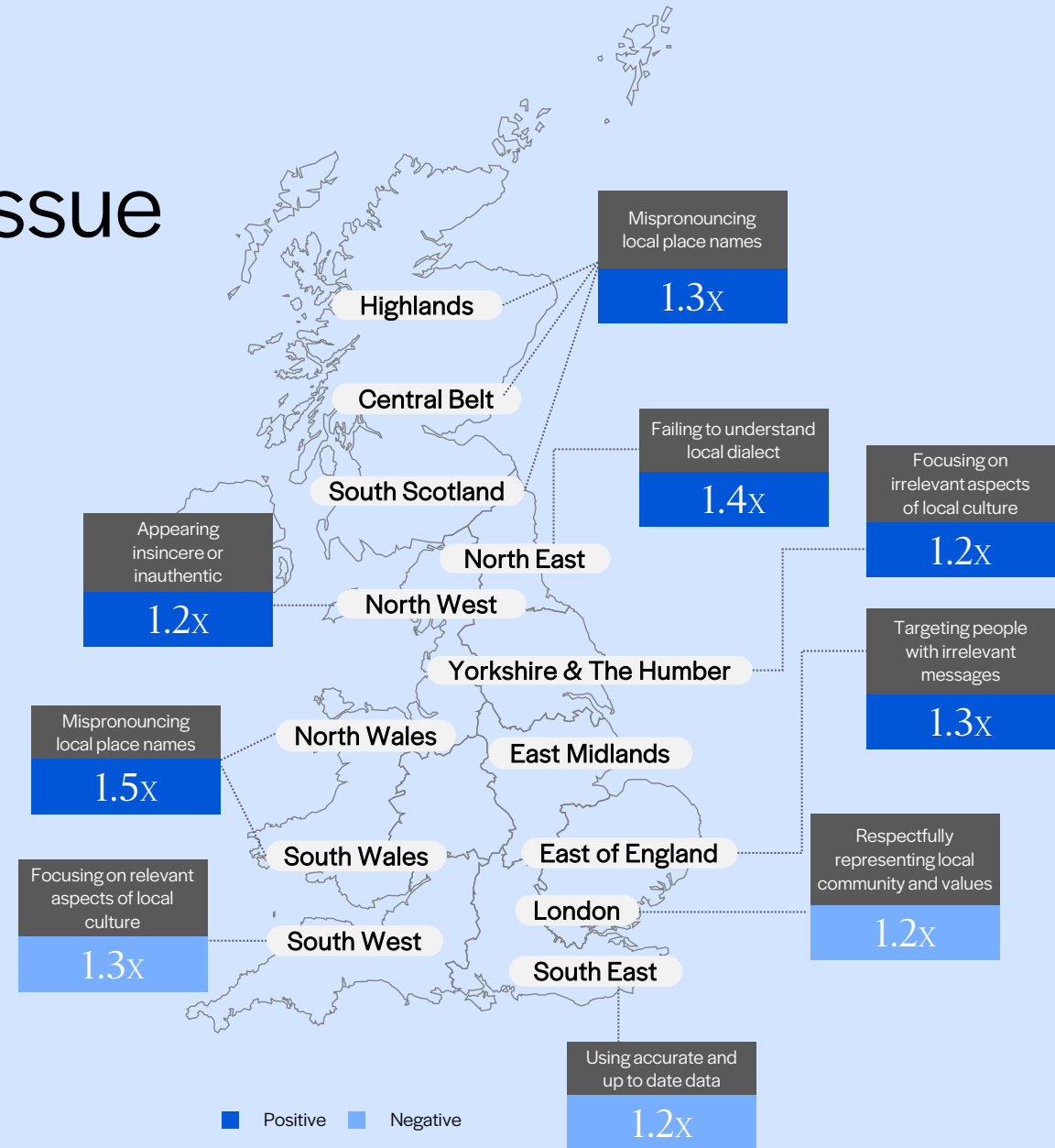
Those who think brands are doing a good job feel they demonstrate respect and genuine understanding of local communities and making appropriate use of local dialects, terms and humour.

But 2 in 5 (41%) feel brands often misuse local cues. Overreliance on stereotypes is a major concern, especially for those who already perceive their area as badly represented in the media. This is particularly true in Yorkshire.

Many feel brands are insincere in their attempts to connect with local communities, a sentiment strongest in the North West. For Wales and Scotland, the mispronunciation of place names creates a negative perception of brand content, and in the North East, a lack of understanding of local dialect and humour contributes to the disconnect.

“ I don't think the media help. I think even on TV if you watch some films you get people acting as Liverpudlians with dodgy accents but they're always the baddies in it. And I think the press sort of home in on that and they don't help.

35-44, Female, Liverpool



G6. Overall, how well do you think brands use local references and associations in advertising in your area? Base n=10,107 G7. What do you think brands are doing well when advertising in your local area? Base n=2,001 G8. What do you think brands are doing poorly when advertising in your local area? Base n=4,238

But getting local representation right makes a difference

More than half (52%) agree that brands should be representing the values of communities and locations in their content. Meanwhile 4 in 10 (39%) are more likely to buy from brands that genuinely showcase different areas of the UK, rising to a remarkable 76% for those who feel their area is well-represented.

Better media portrayal of local areas is also connected with a greater appreciation for advertising. Those who feel their location is accurately represented are more likely to find advertising helpful for product discovery and to enjoy creative, engaging ads. In comparison, the underrepresented are more likely to find advertising annoying and disagree that they find it useful.

People want more positive local narratives, especially in areas that aren't currently feeling well-heard. There is a welcome opportunity for brands to amplify uplifting stories from local communities across the UK.

52%

Brands should represent the values of people from all communities and locations in their advertising

39%

I am more likely to support brands that authentically showcase different parts of the UK in their advertising

Well represented areas

76%

Not at all represented areas

27%

“

I would love to see more positive content of Northern Ireland and the nice sides of our community and the stories of it.

18-24, Female, Belfast

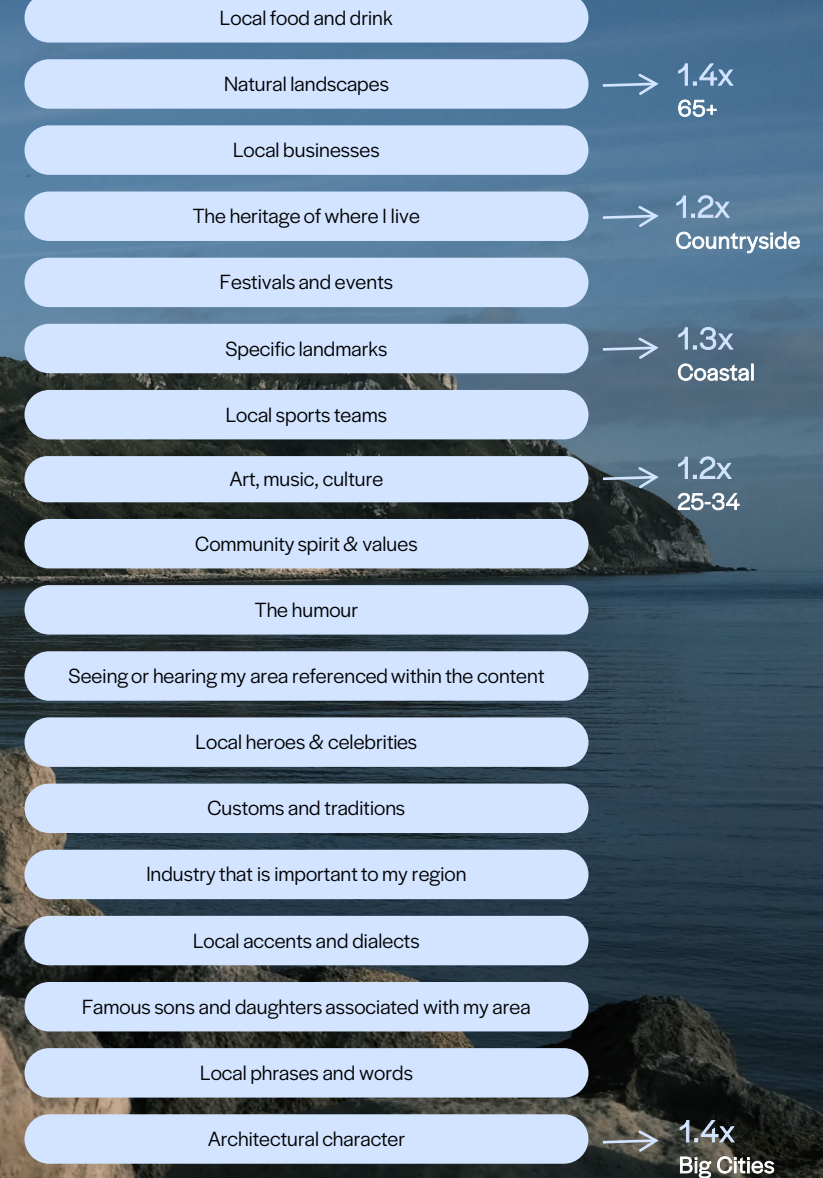
What helps communities feel seen?

Local communities are keen for more than just a name check to feel properly seen and heard. Local food and drink, natural landscapes and local businesses are all elements that people would like to see included more in ad content. However, preferences do vary by audience and location. Nature, for example, resonates most with the over-55s, whilst younger demographics want to see the heart of their community reflected, emphasising local arts, music, culture, community spirit, and local events.

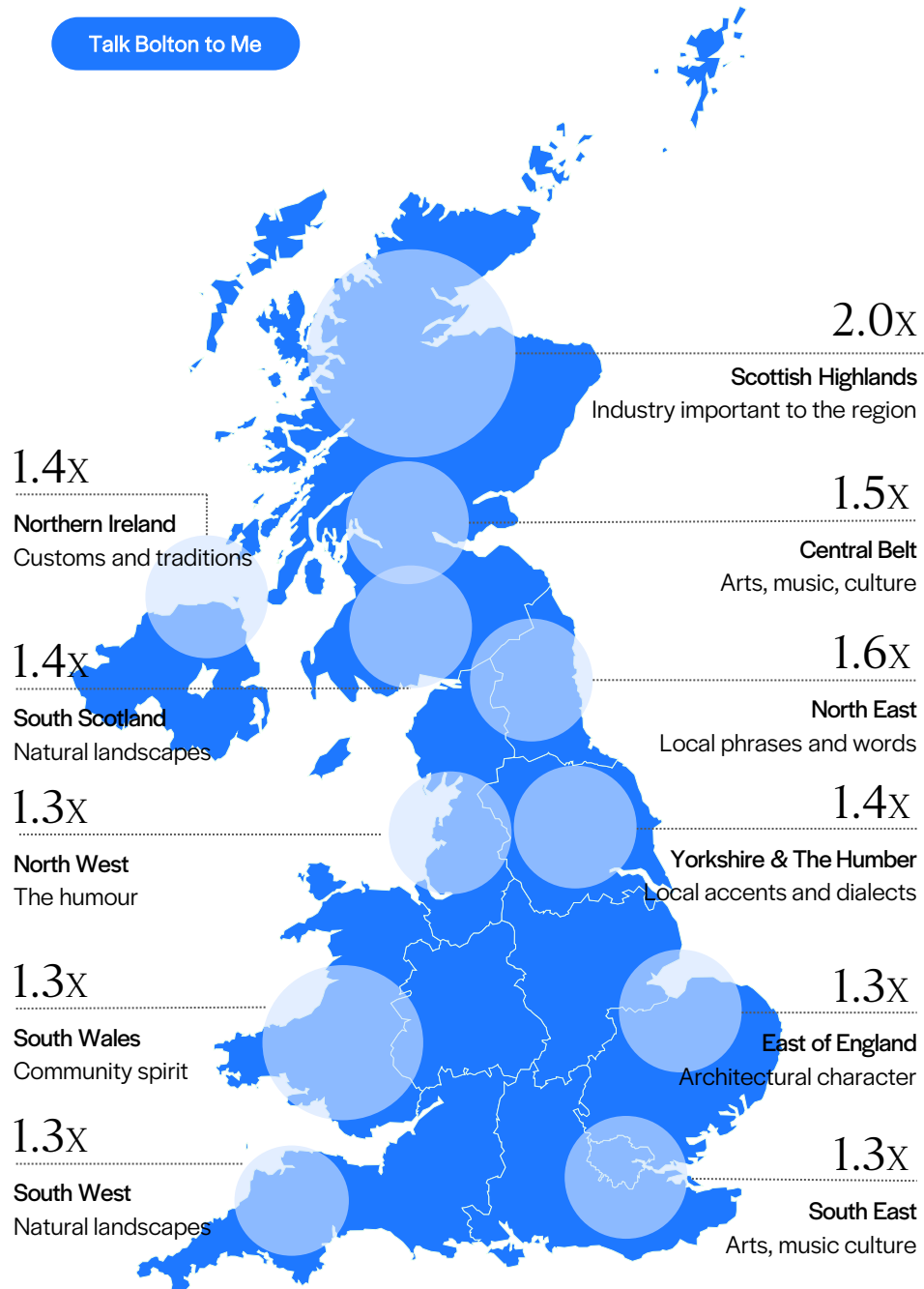
The type of location people live in further influences preferences around representation. In cities, locals are keen to showcase arts and culture, along with architectural character. Coastal regions are more likely to want to see specific landmarks from their area used in media, while countryside residents value representations of their local heritage.



Most important



Least important



Celebrating local wins

Desired representation also varies across the regions, often reflecting core aspects of local identity and pride.

Northern regions celebrate their humour and local sports teams and are keen to see these elements reflected in advertising content. Meanwhile in the Midlands, locals are more likely to want portrayals of important regional industry. In contrast, in Wales and the South West, where a high value is placed on nature, there is a greater desire for brands to emphasise the beauty of the natural landscape.

Accents and the use of local language and phrases are also important when it comes to regional representation, especially in the North and Northern Ireland. People want to hear voices that sound like them. Many favour their local accent as their favourite, most attractive and most trusted. This preference contrasts sharply with current media representation, which predominantly features Southern accents.

G2. What elements would you like to be present in advertising to better represent your local area? Base n=10,107

“

Humour is one of the big things, we know how to have a laugh, we don't take things too seriously, including ourselves, this could only have come from the North East.

**Graeme Whitfield - Editor,
The Journal**



Cris, 22

📍 Cardiff

Cris was born in the Maldives, raised in Wales from the age of three, and is now back home after graduating from the University of Bristol. She's part of the Malayalam Christian community from Kerala.

Young people from multicultural backgrounds are looking for representation that goes beyond casting. It's not about a tick-box exercise of achieving surface-level representation. They want to feel included and integrated into the narrative, rather than being a tokenistic "extra".

Consequently, there's immense interest in brands and creators with lived experience of being British "in my own way".

“

It's not made into a big deal. It's just integrated into normal life because that's what we are.

Shaping our media planning and advertising



#1

Burst the bubble

Culture is not just what's happening in Shoreditch. Interpreting everything through a London lens creates a distorted reference point from which to understand the lives of the people across the UK.

It's important to remember that stories live everywhere, in everyone. By exploring the nuances of local lives and experiences, a deeper understanding can be reached that will enrich brand storytelling and ensure that wider-scale media solutions truly connect.

#2

Moving beyond coordinates

Location is far more than just GPS data; it's the key to understanding who we are and what we need, creating resonance that transcends the more typical tactical geo response.

By celebrating the places that matter in people's lives and the lived experiences of a location, there is an opportunity to better recognise differentiated needs, and through this create richly delineated messaging which is more likely to persuade and resonate.

#3

Unlock untapped local channels

Should we be questioning our media mix more?

With media becoming more diversified, there is more opportunity to adapt content to the different mindsets, platforms and need states that are shaped by the dynamics of a location.

The embracing of competing narratives, the personalisation offered by local cues, and the opportunities of hyper-local channels, can create a richer, more complex personality for a brand, helping it take advantage of this intricate media landscape.

#4

Shared local experiences

Craft campaigns that fully connect with locations; it's not just about name-checking the place and being done.

Celebrate the nuances of each place, the values, the identities, and the unspoken codes that make it unique.

Create "insider moments" that foster a sense of shared identity, tapping into the powerful human tendency to bond over shared experiences and similarities.

#5

Real-life influencers

Harness the power of a community, those neighbourly moments and social spaces of connection where people come together. These can provide opportunities for a brand to become more visible and relevant, with positive buzz a strong driver of consideration and perception change.

Strategically use geo data to identify and activate in areas where neighbourhood influence is strong. Finding the right stories to transmit locally can make behaviours more contagious, bringing a new, amplified dimension to a campaign.

Large-scale 30-minute online survey with a nationally representative sample of n=10,000, with district postcode attached, using Potentia fieldwork.

Fieldwork
Nov - Dec 2024.

Extensive qualitative ethnographic research across the UK, working with:

Meet the 85%

26
interviews

The People

20
interviews

Diversity Standards Collective

6
councils

13 expert interviews with Reach local news editors across the United Kingdom

Additional datasets provided by Blis, Mobsta, Captify and Sky



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We'd like to thank our partners Reach plc and Meet the 85% for providing some imagery. This report is protected by copyright and all rights are reserved. This report, either in whole or part, may not be reproduced.

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