

LG2040: The State of Things to Come Phase 1:

Key Drivers Shaping Local Government to 2040

07 July 2026

Version 5

What this deck contains

This deck contains of drivers of change and emerging issues that are likely to influence the overall environment in which local government operates in England in 2040. They have been selected with reference to this futures question, as the starting point of an overall process that will lead to the development of a vision and strategy for local government in 2040.

They are organised with reference to the STEEPL+V framework (see other column). This is not a strict taxonomy; drivers are often pertinent to two or more of the categories. We have tagged them in order to bring forward the aspect that seems most salient in the context of the project.

They are also tagged with one of three levels of the Molitor framework (see again other column). These categories ensure a range of coverage in the horizon scanning stage. Emerging issues (Advancing) help to ensure that the futures discussion is not over-weighted to the immediate present.

These have been revised and partially updated since the two Driver Prioritisation Workshops.

The STEEPL+V categories:

- **S** - social;
- **T** - technological;
- **En** - environmental;
- **Ec** - economic;
- **P** - political;
- **L** - legal/regulatory;
- **V** - and values.

Molitor's S-curve quadrants:

- **Framing** - ideas which have emerged, but which are still contested;
- **Advancing** - ideas which are more coherent, but still outside the mainstream;
- **Resolving** - ideas firmly in the mainstream.

The drivers at a glance

Note that titles have been shortened or summarised in most cases in order to fit a complete summary list onto one page

Social

- Ageing population
- Rising poverty
- Eroding institutional trust
- Increasing levels of mental illness
- Increasing youth unemployment
- People living longer, having fewer children
- Health divergences between regions
- Social attitudes on migration are polarised

Economic

- Education fails to keep pace with skills needs
- Expansion of care economies
- Food and energy price shocks
- Labour shortages
- Contraction of HE sector
- Sustained shortfall in housing provision
- Declining levels of tourism
- Private monopolies in care provision

Technological

- Ageing infrastructure
- Use of AI in delivery support
- AI as automated decision support
- Political mobilisation around open data
- Deepening labour precarity
- Big Tech and platform monopolies
- Cyberattacks more prevalent
- Normalisation of surveillance
- Changing shape of 'digital divide'

Political

- Rural areas 'left behind'
- Growing interest in Universal Basic Services
- Growing mismatch between local service demands and capacity
- Decline of global 'rules-based' order
- Increasing political party diversity
- Increasing regulatory experimentation
- Marginalisation of coastal towns

Environmental

- Decline in civic space
- Changing transport systems
- Growing interest in bioregions and food security
- Sustained loss of social infrastructure
- Resilience becomes a security issue
- Car dependency continues to be widespread
- Increasing climate volatility
- Cost of renewables continues to fall

Legal

- Planetary boundaries shape legal and policy decisions
- Accountability of digital systems
- New online financial systems
- Growing expectations of good civic space
- Criminal justice system under strain

Values

- Reconfiguration of media channels
- Civic discourse becoming fragmented
- Politics splitting by gender and generation
- Reconfiguration of cultural identity



Social

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Demographic changes are making unprecedented demands on public services, particularly care

STEEPL+V: Social
Molitor: Resolving

People are living longer with more complex and longer-running care needs. This is increasing demand for health and social care, housing adaptation and informal support all at once, and forcing a re-evaluation of what it means to be "old".

Meanwhile, the working-age population is growing more slowly, with the result that tax receipts to pay for services are shrinking.

Signals:

- Rising demand for adult social care and domiciliary support
- More people living for longer with multiple long-term conditions
- Greater pressure on unpaid carers and family support networks
- Growing need for accessible housing, adaptations and age-friendly places

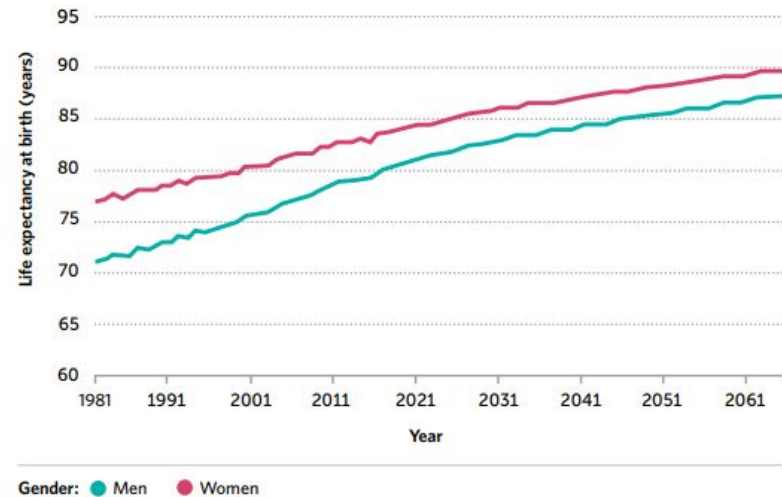


Figure 1.3: Historic and projected period life expectancy at birth in the UK 1981-2064⁷.

Source; The Government Office for Science (2025) *Future of an Ageing Population*
Office of National Statistics(2022) *Voices of our ageing population*
Line chart showing historic and projected UK life expectancy at birth from 1981 to 2067. Men's and women's life expectancy both rise over time, with women remaining higher throughout.

National statistics show a sustained rise in absolute and relative poverty across life stages

Poverty of every category is becoming more prevalent, continuing a trend decades in duration.

Paid work no longer guarantees stability for many people and basic costs are pushing more families into fuel poverty, debt, food insecurity and homelessness.

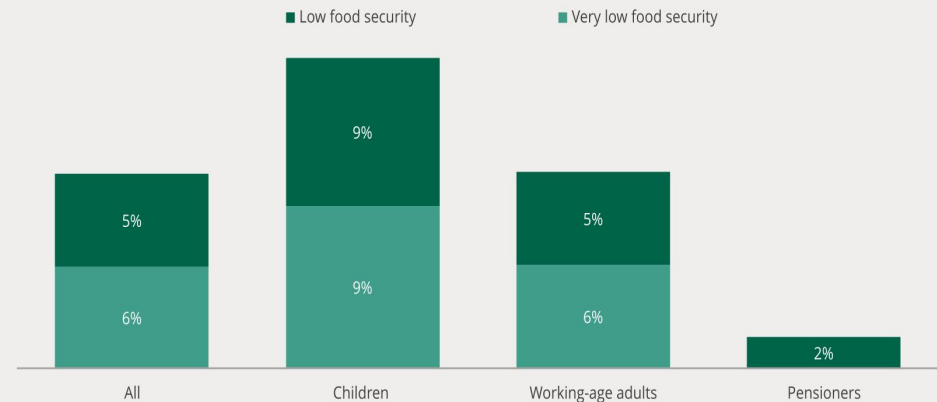
Signals:

- Rising rates of child poverty and in-work poverty
- More households unable to meet basic energy costs
- Increased demand for food banks and crisis support
- Higher levels of arrears and problem debt

STEEPL+V: Social Molitor: Resolving

11% of people in the UK lived in a household with low food security in 2023/24

Percentage of people in households with low and very low food security, 2023/24



Source: DWP, Households Below Average Income 2021/22, Tables 9.1b, 9.3b, 9.5b, 9.7

Source: UK Parliament House of Commons Library (2025)
Bar chart showing the percentage of people in the UK living in households with low food security in 2023/24. Children show the highest levels, followed by working-age adults, with lower levels among pensioners.

Respect for traditional authority and expertise has been eroded by an increasingly plurivocal media sphere

STEEPL+V: Social Molitor: Advancing

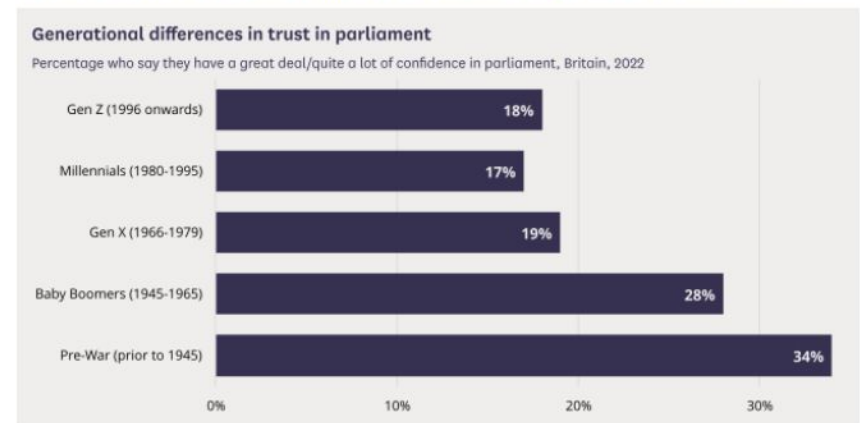
Old structures of authority and expertise have been significantly weakened by shifting social values, and by the reconfiguration of the mediascape.

Expertise is still valued in some contexts, by some groups, but it now competes with alternative credentials, peer networks, lived experience and platform-based influence in shaping the ideas and opinions that people trust and act upon.

Signals:

- Falling trust in established institutions and experts
- Greater influence of peer networks and online figures
- More public challenge to official advice or evidence
- Institutions adapting how they communicate and justify decisions

Figure 4: Levels of trust in the UK Parliament over time by generation^a



Source: Trust in trouble? UK and international confidence in institutions. The Policy Institute, King's College London.

Horizontal bar chart comparing levels of trust in the UK Parliament across generations. Younger and older age groups show different levels of confidence, highlighting that institutional trust is uneven and politically significant.

National Centre for Social Research (2024) [British Social Attitudes 41 | Damaged Politics?](#)
King's College London (2023) [Trust in trouble? UK and international confidence in institutions](#)

POST (2025) [Trust, public engagement and UK Parliament](#)
OECD (2024) [OECD Survey on Drivers of Trust in Public Institutions 2024 Results - United Kingdom](#)

Mental illness and neurodiversity are becoming more commonplace, more visible, and more controversial

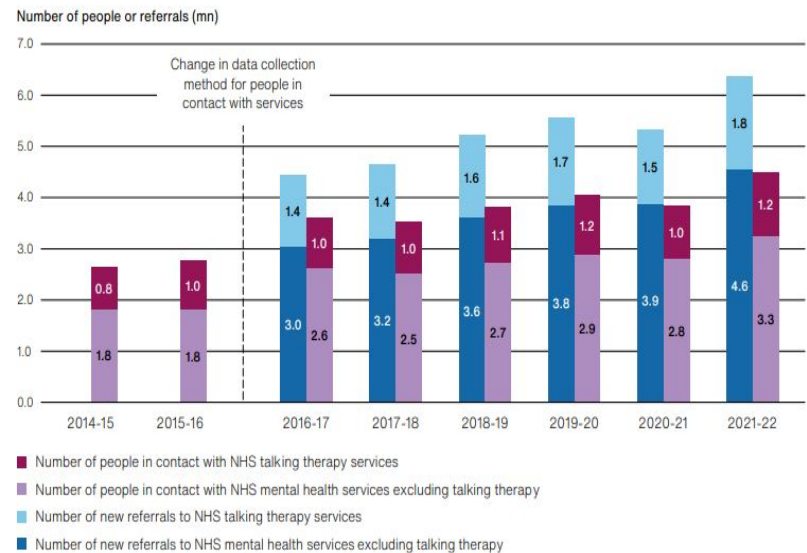
STEEPL+V: Social
Molitor: Resolving

Cognitive diversity and mental ill health are more visible across schools, workplaces and daily life. Better recognition has widened public understanding of neurodiversity while anxiety, depression and related conditions are affecting more people across different settings.

Expectations around support, adjustment and inclusion are changing as a result, but there is also a growing backlash and concern about overdiagnosis.

Signals:

- More diagnoses and self-identification around neurodiversity
- Rising prevalence of anxiety, depression and related conditions
- Greater demand for workplace and education adjustments
- Broader public language around mental health and cognitive difference



Source: National Audit Office (2023), Progress in improving mental health services
Grouped bar chart showing changes in mental health service activity over time, split across several service categories. The bars increase across the period, showing that mental health needs and service demand are becoming more visible and more significant.

Young people are increasingly out of education, out of work, and staying at home

**STEEPL+V: Social
Molitor: Advancing**

A growing number of young people are struggling to find a stable route into work, study or public life. This phenomenon is sometimes labelled NEET: Not in Education, Employment or Training. Youth unemployment rates hit a ten year peak in early 2026, possibly in the short-term as a result of changes to minimum wage legislation.

However, the issue appears more deep-rooted. The 2026 Milburn report for the DWP called the issue “a generational faultline” with complex causes. The effects are increasing detachment from both work and lower social participation.

Signals:

- Nearly 1 million youth are NEET
- Greater concern about social withdrawal and isolation among younger people
- Stronger policy focus on transition and re-engagement



Source: Unsplash
Photograph of a young person sitting alone outdoors beside bags or belongings.

While average life expectancy trends upward, the birth rate has fallen below replacement

STEEPL+V: Social
Molitor: Framing

Data shows that people are living longer and fewer children are being born, and this is changing the age structure of society in a lasting way.

Older age groups make up a larger share of the population while younger cohorts form a smaller one. The consequences play out in care, labour and public finances.

Signals:

- Median age continuing to rise
- Birth rates remaining below replacement level
- Larger share of older adults in local populations
- Growing pressure on care systems and age-related services

Figure 1 Number of live births, England and Wales, 1900 to 2023



Source: UK Parliament POST (2025)

Line chart showing the number of live births in England and Wales from 1900 to 2023. Births fluctuate over the long term, with visible peaks around post-war baby booms and a downward trend in recent decades.

Regional disparities in life expectancy and measures of good health are widening

STEEPL+V: Social
Molitor: Resolving

Life expectancy and health outcomes are increasingly divergent across different parts of the country, with some regions seeing longer lives and better health while others are marked by chronic illness and shorter life spans.

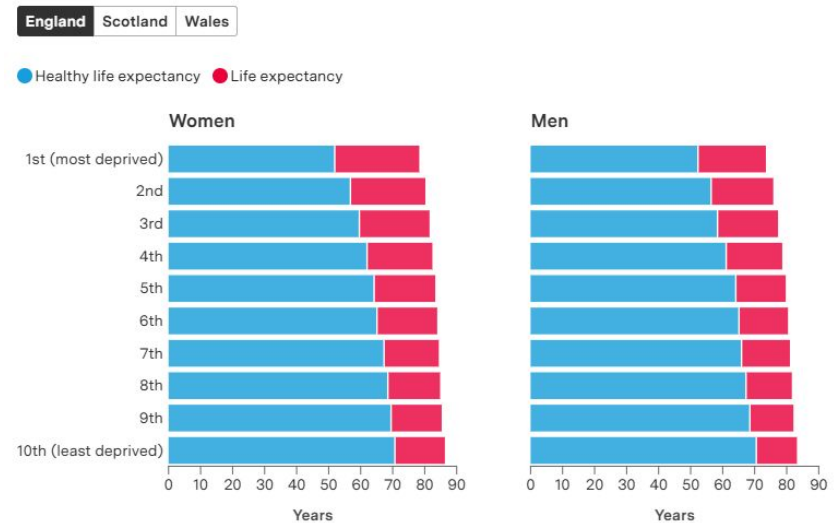
These widening gaps reflect deeper underlying differences in income, housing, work and environment, as well as the unequal distribution of healthcare and other forms of support.

Signals:

- Wider regional gaps in life expectancy
- Uneven rates of chronic illness and disability
- Strong links between poorer health and deprived areas
- More attention to place-based health inequality

The most deprived areas have the lowest life expectancy and healthy life expectancy

Period life expectancy and healthy life expectancy at birth, by deprivation decile/quintile, Great Britain, 2018–20



Source: The Health Foundation (2025.), Inequalities in life expectancy and healthy life expectancy
Two stacked bar charts comparing men and women by deprivation level. The charts show that people in more deprived areas live shorter lives and spend a larger share of life in poor health.

ONS(2025) [Life expectancy for local areas of the UK: between 2001 to 2003 and 2022 to 2024](#)
The Health Foundation (2023) [Inequalities in life expectancy and healthy life expectancy](#)

McCartney, G. and Walsh, D. (2025) [Understanding changes to life expectancy and inequalities in the UK, Germany, and other high-income countries](#)

Attitudes to immigration are both polarised by party affiliation and age, but also relatively nuanced.

Ipsos reports that immigration continues as the most significant issue of concern for voters. This issue has become sharply polarised, though this varies by age and education level.

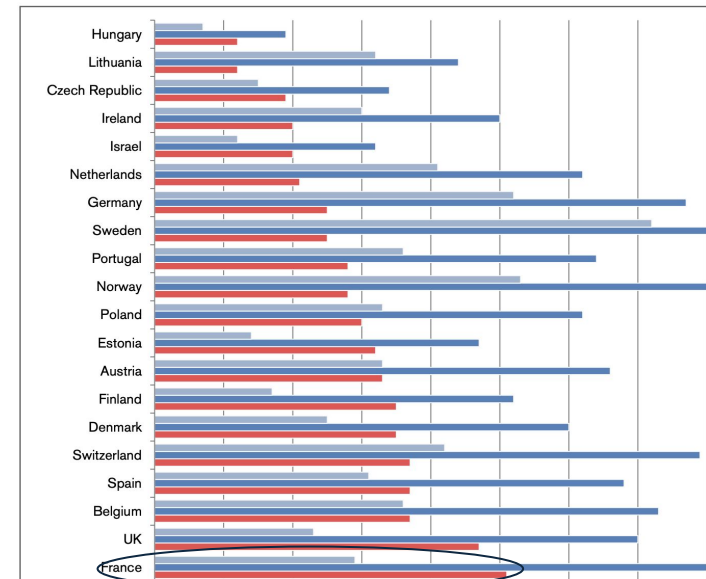
According to NatCen, those saying that immigration was good for the economy are marginally outweighed by those who say not. There is a similar picture on whether British cultural life is enriched or undermined by migration. By European standards, however, British attitudes towards immigration remain relatively benign.

Signals:

- Wide gaps between perceived levels of immigration, types of immigration, and actual levels.
- 'Culture war' discourse is at its highest point since 2020.

STEEPL+V: Social
Molitor: Resolving

Percentage point gaps (in red) between the young highly educated and the older less educated in support for allowing



Source: European Social Survey, 2023. [Attitudes towards Immigration and their Antecedents: Topline Results from Round 7 of the European Social Survey](#). Comparative bar chart showing support for allowing migrants from poorer countries outside Europe. Grey: old, low-education; blue, young, high education, red: size of gap between them.

Ipsos (2026) [Public concern about defence and foreign affairs doubles in wake of Iran conflict, with economic pessimism also increasing to near-record high](#)
National Centre for Social Research (2026) [British Social Attitudes 43: A First Look](#)
The Migration Observatory (2025) [UK Public Opinion toward Immigration: Overall Attitudes and Level of Concern](#)

Katwala, S. et al (2025) [Noise and Nuance: What the public really thinks about immigration](#)
The Policy Institute, KCL/ Ipsos [The UK's changing 'culture wars': Division, tension and common ground](#)



Technology

- . Ageing infrastructure
- . Use of AI in delivery support
- . AI as automated decision support
- . Political mobilisation around open data
- . Platform based work
- . Big Tech and platform monopolies
- . Cyberattacks more prevalent
- . Normalisation of surveillance
- . Changing shape of 'digital divide'

Roads, railways and power grids are unfit for a changing environment and economy, but upgrades are challenging

Much existing infrastructure for mobility, energy and communications was built in an earlier era, and does not meet the needs of the 21st century economy in an era of climate change. Spending pressures also mean that maintaining and upgrading existing systems becomes more challenging.

Critics also point to long delays in building new infrastructure. While HS2 is the poster child for this, delays in connecting new energy installations to the national grid is likely to have more impact.

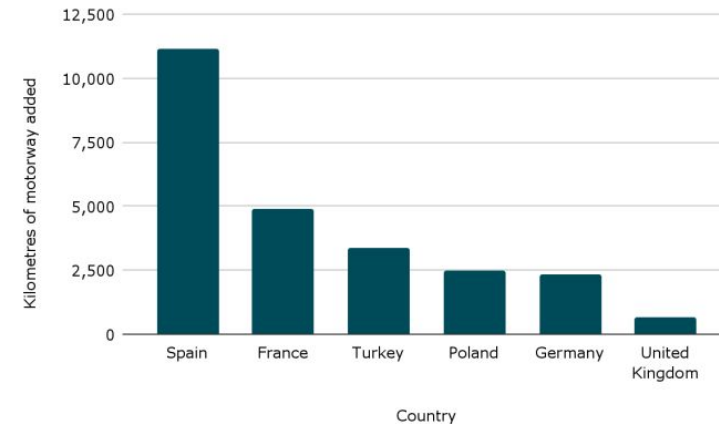
The current government has announced changes to planning rules and investment in new road and rail schemes, although some of this is 'rebadged' existing spend. More generally, there are skills shortages, capacity issues, materials issues and problems with funding models.

Signals:

- More disruption linked to ageing assets and maintenance backlogs
- Greater investment in retrofit and resilience upgrades
- Infrastructure plans focus on decarbonisation and adaptation

STEEPL+V: Technological Molitor: Advancing

GRAPH 1: KILOMETRES OF MOTORWAY ADDED SINCE 1990, SELECTED COUNTRIES⁵



Source: Caudwell Strong Britain (2025), *Road to nowhere: Britain's infrastructure problem*
Bar chart comparing kilometres of motorway added since 1990 across selected countries. The UK appears low compared with several peers.

HM Treasury (2025) [Chancellor takes on the blockers to get Britain building](#)
Department for Transport (2025) [Transforming the UK's road and rail networks](#)

Institute of Civil Engineers (2026) [State of the Nation: Infrastructure in 2026](#)
Council on Geostrategy [Road to nowhere: Britain's infrastructure problem](#)

Organisations are increasingly using AI to augment delivery of services, with contested claims of productivity gains

According to ONS data, 26% of businesses reported using some form of AI technology, and for businesses with more than 250 employees, this proportion was higher, at around 45%. Bank of England data shows that 75% of firms in the UK financial services sector were using AI.

Workplace impact is mixed. Some studies have found large increases in output, notably in the software sector. Generally, lower skill workers have seen larger gains in productivity; for higher skill workers output increases but quality of output becomes more variable, and may decrease. Tailored small language models (SLMs) which respond faster, may be more effective for public services. Gartner forecasts organisations may use SLMs three times as much as LLMs by 2027.

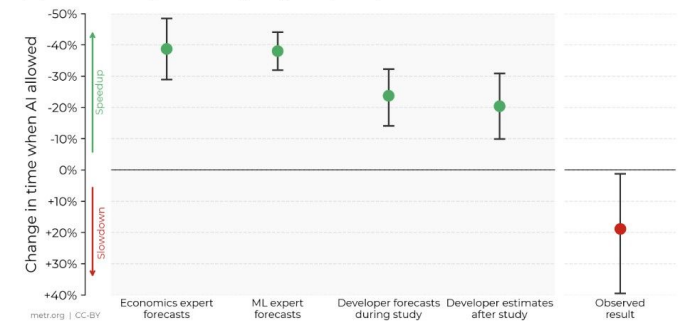
Signals:

- The UK Behavioural Insights Team states that most people think the government should use AI to help citizens.
- A Kingston council pilot uses a version of ChatGPT to help frontline social workers take notes and perform assessments.

STEEPL+V: Technological Molitor: Framing

Against Expert Forecasts and Developer Self-Reports, Early-2025 AI Slows Down Experienced Open-Source Developers

In this RCT, 16 developers with moderate AI experience complete 246 tasks in large and complex projects on which they have an average of 5 years of prior experience.



METR (2025)
Dot and interval chart showing estimated AI impact on developer productivity across different conditions or tasks. The visual shows mixed or uncertain effects rather than a simple productivity gain.

Governments are increasingly using AI to automate public services and accelerate decision-making

Governments have identified potential benefits of AI technologies in automating routine process work, with some use cases in decision-making and forecasting. Data and measurement issues mean that most UK government initiatives are still in pilot phase. Most AI initiatives involve supporting civil servants to help them navigate government records, or supporting civilians in interacting with public services.

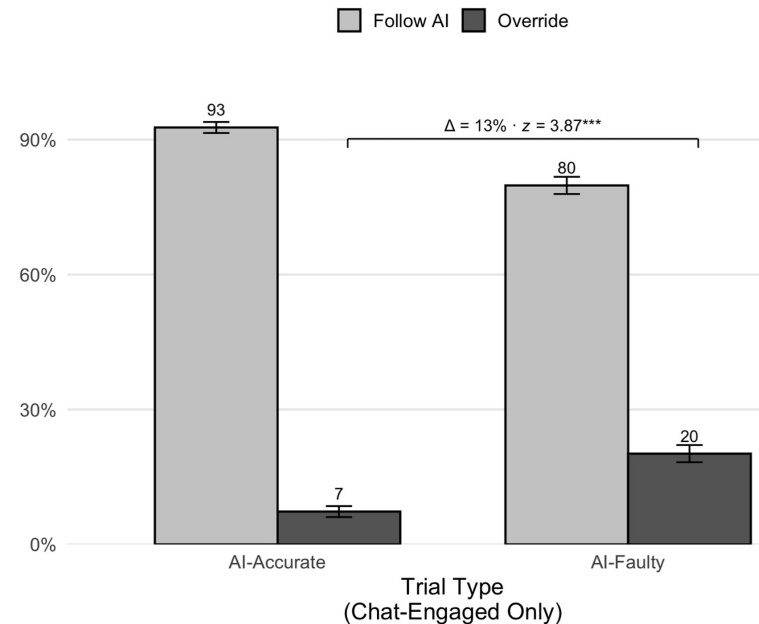
Use of AI and algorithms to optimise public services comes with risks. This includes automation bias, where workers defer their cognition to LLMs. Researchers remain concerned that the use of AI in service provision may reinforce existing delivery biases. Transparency is also an issue.

Signals:

- In Finland, AI is being used to forecast city centre traffic using camera data, weather feeds and event schedules.
- The UK public sector's Algorithmic Transparency Recording Standards Hub contains less than 150 records, far fewer than the 1,000 in a similar database in the Netherlands.

STEEPL+V: Technological Molitor: Advancing

Participants are almost as likely to adopt System 3 [AI derived] answers even when they are faulty



Shaw & Nave (2026)
Bar chart comparing how often participants adopted AI-derived answers across task types. The chart shows that participants were willing to accept AI answers even when they were faulty.

OECD (2025) [Governing with artificial intelligence](#)
OECD.ai (2026) [Policies, data and analysis for trustworthy artificial intelligence](#)
Shaw & Nave (2026) [Thinking—Fast, Slow, and Artificial: How AI is Reshaping Human Reasoning and the Rise of Cognitive Surrender](#)
Ars Technica (2026) [“Cognitive surrender” leads AI users to abandon logical thinking](#)

Annual Review of Law and Social Science (2021) [Algorithms and Decision-Making in the Public Sector](#)
Gov.UK (2026) [Algorithmic Transparency Recording Standards Hub](#)
Overheid.nl (2026) [Algorithm Register of the Dutch government](#)
D. Dennison (2025) [Generative AI has access to a small slice of human knowledge](#)

Civic groups are demanding access to data as a right and as a governance tool.

Movements across sectors are pushing for open data to improve accountability, public participation, and innovation. However, access is uneven, and openness without safeguards can lead to misuse or marginalisation.

These campaigns have gained force from a growing awareness that the collection and exploitation of behavioural data is the underlying business model of Big Tech. At the same time, the extent to which data-driven systems and services have become embedded in daily life at work and at home – and in government – means that these movements lack leverage.

Signals:

- Public campaigns for open procurement and budget data
- Civic tech tools for monitoring services and corruption
- Pushback against selective or manipulated government data releases

STEEPL+V: Technological
Molitor: Advancing



Pierre-Selim, via Wikimedia Commons
Photograph of people wearing Guy Fawkes masks, commonly associated with digital activism and protest movements.

The “job for life” is a thing of the past, with careers characterised by rapid role changes and/or multiple income streams

Stable long-term employment is giving way to work built around short contracts, freelance roles and multiple income streams. This is increasingly true in what were until recently thought of as stable, middle-class professions, as well as in the manual labour and service sectors.

Careers are becoming more fragmented and less predictable, with people moving between jobs, platforms and side-work rather than staying in one track. Around one in every ten workers is believed to be effectively trapped in precarious employment.

Signals:

- Growth in gig work and platform-based labour
- More people combining several income sources in “portfolio careers”
- Shorter job tenure across sectors
- Rising concern about insecurity and weak protections at work

STEEPL+V: Technological
Molitor: Advancing



Zhionghwaong Sham , via Wikimedia Commons

Photograph of a delivery worker carrying a large insulated delivery bag up outdoor steps.

A small group of tech firms increasingly influence public discourse, markets, and civic infrastructure

STEEPL+V: Technological
Molitor: Framing

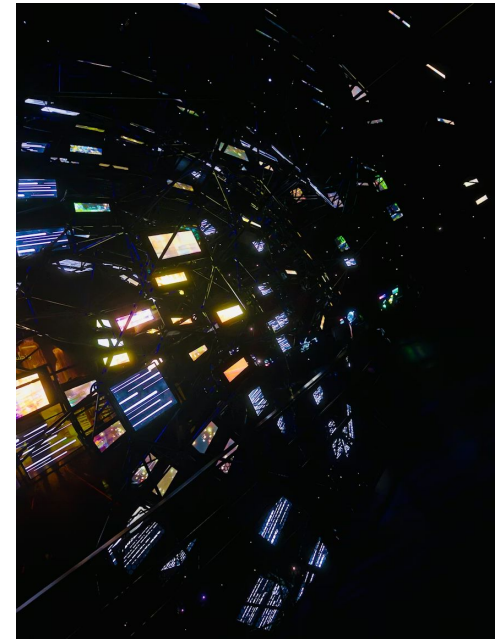
From cloud infrastructure to content algorithms, power over and control of discursive and commercial space is increasingly monopolised by a few global firms.

This creates bottlenecks in data access, distorts narrative space, and weakens public oversight. Attempts to regulate often lag behind technical innovation, and jurisdictions face significant challenges in asserting digital sovereignty.

Recent geopolitical shifts have emphasised the scale of the problem, as reliance on the products or services of any one firm is also, in effect, reliance on the political favour of that firm's base nation.

Signals:

- growing concerns around dominance of Big Tech companies
- urgent pursuit of "digital sovereignty"
- anxieties over embedded surveillance in software and hardware



Source; Kevin Shi, via Unsplash
Dark photograph of illuminated screens or digital interfaces in a dense technological environment.

Cyberattacks, ransomware, and digital fraud are increasingly prevalent

T7

Software monopolies, inadequate maintenance and low digital literacy leave organisations and individuals vulnerable to sabotage and ransom

STEEPL+V: Technological
Molitor: Advancing

Ransomware has become a routine threat to operations, data integrity and public trust, with a number of high-profile attacks on the public sector. In addition, domestic “cyberfraud” is becoming increasingly common.

Old hardware and software, weak security and poor digital security literacy all serve to widen an organisation or individual’s “attack surface” – the landscape of potential points of exploitation and access.

Signals:

- Increasing numbers of ransomware attacks on public and private organisations
- Service disruption caused by cyber incidents
- Higher spending on cyber resilience and recovery
- Greater concern about vulnerabilities in legacy systems
- Cyberfraud targeting individuals among the fastest growing categories of crime



[istockphoto.com](https://www.istockphoto.com)

Photograph of a sticky note with a weak password written on it, placed near a computer keyboard.

Governments and businesses are deploying data tools to anticipate threats and increase profits, amid some resistance

STEEPL+V: Technological
Molitor: Advancing

The government is increasingly making use of digital surveillance and monitoring systems to predict and manage risk, both online and in public space. Facial recognition and other biometric techniques promise to effectively automate certain security and policing functions. But there are significant concerns regarding their reliability, and over the encroachment on civil liberties.

A similar situation is prevalent in the commercial sector. Customer surveillance and tracking are often a central element of modern business models, particularly (but not exclusively) online.

Signals:

- widespread deployment of facial recognition systems in public spaces
- regular surges of interest in “predictive policing”
- growing concern about the collection, exploitation and theft of data



Source; Wikipedia Commons
Image of a surveillance or security-themed display, with a close-up visual style that evokes monitoring and biometric control.

Patterns of digital exclusion are moving away from age towards access, affordability, and skills and competence

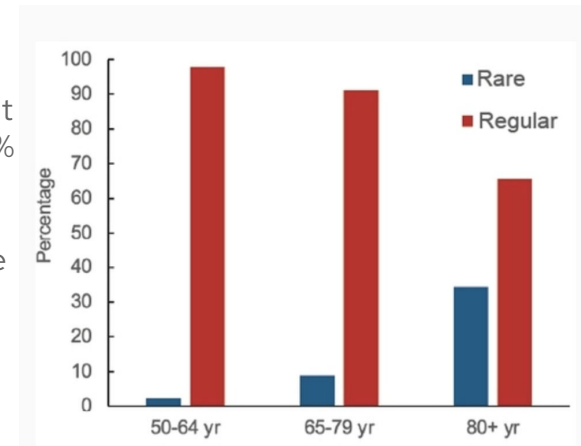
The traditional perception of a 'digital divide' between age cohorts is no longer reliable. While there are still age related factors, access, skills, and affordability are more important elements in digital exclusion. 7% of households do not have internet access at home; 10% of UK households struggle to afford their broadband service; and around 16% of UK adults (8.5m) lack basic digital skills, although this proportion is falling. Those without skills are more likely to have a disability, no formal qualifications, or be older. Internet use by older people is more influenced by socio-economic status and cognitive ability.

Analysis by CEBR projects that productivity gains from closing the digital gap could be £23 billion, with a £10 billion uplift in household incomes. 70% of digitally excluded consumers are interested in learning more digital skills.

Signals:

- 92% think that most essential services require internet access, and 87% that there should be more local support
- The National Digital Inclusion Network includes 8,000 Digital Inclusion Hubs.

STEEPL+V: Technological Molitor: Advancing



'Regular' vs 'rare' internet use, by age cohort. Knowles et al (2026)
Bar chart comparing regular and rare internet use by age cohort.



Environment

- . Decline in civic space
- . Changing transport systems
- . Growing interest in bioregions and food security
- . Sustained loss of social infrastructure
- . Resilience becomes a security issue
- . Car dependency continues to be widespread
- . Increasing climate volatility
- . Cost of renewables continues to fall

While “champion” locales attract all the attention, other parts of the built environment are neglected or abandoned

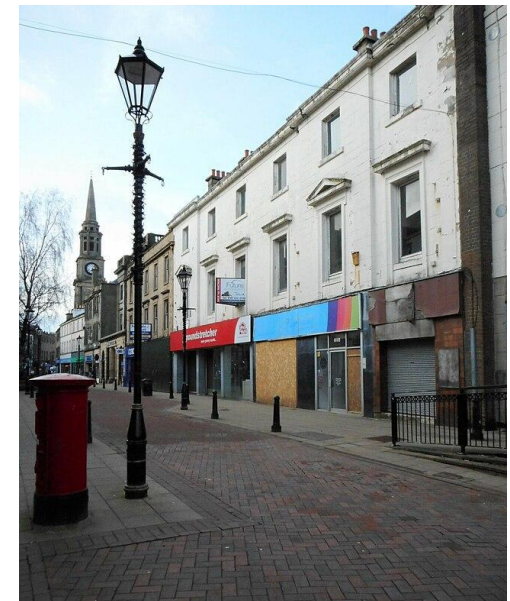
The effects of economic consolidation and the impact of online shopping on the retail sector are clearly visible in English cities. Former “flagship” stores stand empty; a dwindling selection of chain retailers dominate the offer; smaller units house bookkeepers and vape-shops. In smaller towns, the effect is more drastic: the “dead” high street.

This is an intensification of a long-running trend, with its origins in the rise of big-box retail and out-of-town mega-malls. It is understood that sustaining footfall is key to keeping retail zones alive, and a number of councils have experimented successfully with creative uses for empty and underutilised properties.

Signals:

- increase in empty retail units and extractive businesses in urban retail areas
- activity tends to consolidate in high-footfall locations
- re-use of empty units by “pop-up” businesses, artist collectives

STEEPL+V: Environmental
Molitor: Advancing



Richard Sutcliffe, CC BY-SA 2.0, via Wikimedia Commons

Photograph of a quiet high street or town-centre street with shops and public realm visible.

Local and regional authorities are seeking to take back control of formerly privatised transport systems

Mobility systems are being reorganised around reliability, public control and fairer access rather than efficiency alone. In some places that means bringing fragmented or privatised networks under stronger local coordination so routes, fares and service standards can be aligned more clearly with public need. One motive is to improve connectivity within regional labour markets.

This re-invention of public transport has been enabled by regulatory devolution to regional and local authorities – but these organisations now face the challenge of relearning in-house skills and knowledges lost to privatisation.

Signals:

- More franchising or municipal control models for transport
- Stronger demand for reliable access in underserved areas
- Transport strategies framed around inclusion and resilience

STEEPL+V: Environmental Molitor: Framing



UK bus Image, CC0, via Wikimedia Commons

Photograph of a bus on a street or at a stop.

Localised food systems are re-emerging as expressions of identity and resilience

In response to homogenised and extractive food models, communities are reclaiming traditional food knowledge, seeds, and preparation methods. In the English context, this global phenomenon expresses most strongly in the “locavore” concept, which focuses on the use of regionally and seasonally specific produce.

This bears relation to a revival of interest in the ecological concept of the “bioregion”, which sees a region as being defined by the relational network of plants and animals that inhabit it alongside human beings.

Signals:

- growth of farmer-led seed networks and localised food hubs
- increased interest in non-processed and locally-sourced food
- engagement with regionally situated understandings of ecology and economy

STEEPL+V: Environmental Molitor: Framing



Daderot, CCO, via Wikimedia Commons
Photograph of fresh vegetables or produce laid out in a market-style display.

The reduction of locally embedded associations and “third places” is further eroding attachment to place

STEEPL+V: Environmental
Molitor: Advancing

Local social institutions, including community centres, residents’ associations, and neighbourhood cafes, pubs and shops, are in decline. People still band together around interests and activities, particularly sports, but these are increasingly mediated by online systems and/or reliant on the use of privately-owned locations.

The disappearance and/or up-marketing of so-called “third spaces”, such as the traditional “local” pub, has further reduced opportunities for casual social interaction and meeting new people. These developments correlate with a much-reported increase in loneliness and social isolation, although other factors contribute..

Signals:

- commercialisation of social activities and venues
- growing sense of social disconnection
- steady disappearance of associations, clubs and public houses



James Yardley, CC BY-SA 2.0, via
Wikimedia Commons
*Photograph of a local pub or
community venue*

Geopolitical and climate turbulence puts a new premium on economic autonomy and environmental resilience

The conceptualisation of national security is widening to include the ability to absorb economic and resource shocks and keep essential systems running. Energy, food, health, data and local infrastructure now sit closer to the centre of security thinking.

While less formalised, a similar logic is playing out at a regional level: areas once dependent on a now-declining industry, or on imported goods, are finding themselves obliged to realign and rely on what is close to hand. Some councils have turned to local procurement policies as a way to keep wealth circulating in the area.

Signals:

- national security strategies placing more emphasis on resilience
- growing concern about supply shocks and critical infrastructure failure
- more focus on civil preparedness and continuity planning
- some success with local procurement policies

STEEPL+V: Environmental Molitor: Framing



Source; Wikipedia Commons
Photograph of solar panels or energy infrastructure.

Car dependency continues to be widespread, especially in rural areas

Many individuals and families are obliged to own a car, resulting in an economic burden as well as an environmental one

Once a marker of economic and social freedom, car ownership has for many become an expensive yet unavoidable necessity, with 40% of drivers saying they have no alternative options – a figure that rises to 70% in rural areas.

Leaving aside the matter of pollutants, cars require roads and related infrastructure, which are not only costly but environmentally disruptive. The relative population density of the UK makes it well-suited to public transportation models, but the entrenchment of the car makes the pivot appear costly and slow.

Signals:

- 70% of rural residents see no alternative to car ownership
- road maintenance is a growing financial and logistical burden
- built environment optimised for cars and parking

STEEPL+V: Environmental
Molitor: Resolving



Robert Ashby, Wikimedia Commons
Photograph of a road scene with vehicles and road signage.

Extreme weather, rising sea levels and other effects of climate change are making some areas uninhabitable and uninsurable

Weather patterns are becoming more unstable and more extreme in ways that affect daily life. Flooding, heatwaves, storms and drought now occur more often and with greater disruption. Repeated events place sustained pressure on infrastructure, housing and essential services rather than appearing as isolated shocks.

Extreme heat in urban areas is becoming a particular concern, with calls for access to cool spaces as a necessity, or even a human right. Meanwhile flooding and coastal erosion are rendering some regions uninsurable, and burdened by the costs of evacuation and recovery.

Signals:

- Increased frequency of extreme weather events
- Disruption to transport, housing and services
- Rising costs of recovery and repair
- Greater demand for local adaptation measures

STEEPL+V: Environmental
Molitor: Advancing



Matt Fascione, via Wikimedia Commons

Photograph of flooding on a road or path, with water covering the ground.

The cost of renewables continues to fall relative to gas and oil

Solar and wind power continue to be rolled out as their cost falls, and battery storage is growing quickly

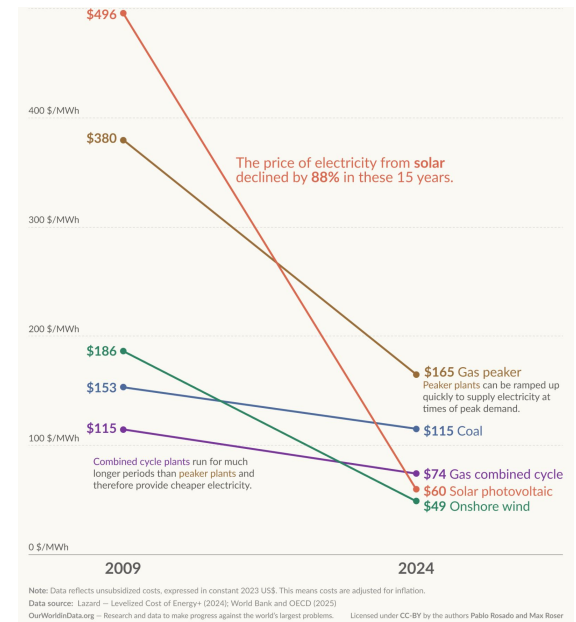
In 2025 renewable energy sources (wind, solar, hydro, and biomass) provided just over half of UK electricity, representing a 6–7% increase over 2024. Onshore and offshore wind provided close to three-fifths of that (30% of the total), with solar providing 7% of the total. Solar's share is growing rapidly, partly through rooftop installations. The cost of both wind and solar have fallen rapidly over the past 15 years, and both are cheaper than gas. Variability of renewables supply means that gas continues to play a significant part in the UK energy mix, which increases household energy bills. However, there is also substantial growth in battery storage.

Community solar is a growth area, creating local energy security and reducing bills. There are multiple social housing community energy schemes now in operation, with substantial scope for further growth.

Signals:

- 40% of new homes had solar installed in 2025, up sharply from 2024.
- The government's 'Solar Roadmap' is designed to drive a significant increase in clean power in the UK by 2030.

STEEPL+V: Environmental Molitor: Advancing



International cost of new energy plants by energy type, 2009–2024. Our World in Data, 2025
Line chart comparing the international cost of new energy plants by energy type from 2009 to 2024. Solar and wind costs fall steeply over time, while fossil fuel options do not show the same decline.

DESNZ (2026) [Energy Trends](#)
Modo Energy (2026) [The Battery Buildout Report GB](#)
Bell (2024) [How cost effective is a renewables-dominated system in comparison to one based on fossil fuels?](#)

Our World in Data, (2025) [Why did renewables become so cheap so fast?](#)
Renewable Energy Installer (2025) [More than 40% of new homes built have solar, figures suggest](#)
DESNZ (2025) [Solar Roadmap: United Kingdom Powered by Solar](#)





Economic

- Education fails to keep pace with skills needs
- Expansion of care economies
- Food and energy price shocks
- Labour shortages
- Contraction of HE sector
- Sustained shortfall in housing provision
- Declining levels of tourism
- Private monopolies in care provision

Education and training systems struggle to keep pace with changing skill demands

Concerns are growing that secondary education does not adequately prepare young people for modern life

STEEPL+V: Economic
Molitor: Framing

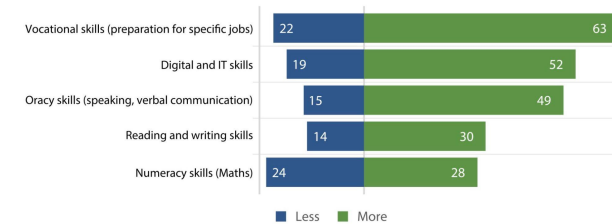
Concern is growing that secondary education and other forms of training are inadequate to the task of preparing young people for a rapidly changing world of work and culture.

Existing curricula can feel out of step with rapid technological change, insecure labour markets and new demands on civic and social judgement. However, transferable soft skills such as communication, collaboration, problem-solving and creative thinking may be as important as tech skills. There is increasing pressure to reconsider the underlying aim of education, and which capabilities and types of knowledge deserve more weight.

Signals:

- Public criticism that curricula do not reflect current conditions
- Greater emphasis on digital, civic and adaptive skills in a changing world
- Employer concern about gaps between qualifications and practical capability
- Growth in alternative and supplementary learning pathways

What skills do students want more or less of?



Source: Freeman (2024), Higher Education Policy Institute. Data: Savanta for HEPI. 'Don't knows' and 'None of the above' excluded. Horizontal bar chart showing which skills students want more or less of, showing that education and training may not match the capabilities young people think they need.

Care is being redefined as a broader societal function beyond domestic or professional spheres.

We think of care as a service, provided by the state, the private sector, or within the domestic or family context. However, domestic care was effectively invisible until fairly recently, when sustained campaigning made it economically legible.

This expansion continues, with activists and researchers pushing for the recognition of caring work as being undertaken within more diffuse communities and social groupings. This is accompanied by a broader notion of the activities which care might include – such as tending to emotional and social needs, rather than just physical ones, or even the work of activism itself.

Signals:

- Campaigns to value unpaid and community-based care
- Proposals for universal caregiver support systems
- Integration of care into climate and urban policy, and workplaces

STEEPL+V: Economic
Molitor: Advancing



Source; Washington Centre for Equitable Growth (2021)

Illustration of people arranged around care-related activities and support roles.

Food and energy price-shocks are increasingly frequent

Geopolitical instability and brittle supply chains highlight reliance on imported food and fuel.

Food and energy supplies are increasingly exposed to disruption from accelerating climate change, geopolitical conflict and fragile supply chains.

Price shocks now travel faster across borders and hit households more directly, especially where incomes are already stretched. This creates a more volatile cost base for everyday life, with pressure spreading through transport, housing, food security and local business viability.

Signals:

- Sharp rises in household food and energy costs
- Disruption to fuel and fertiliser supply
- More emergency measures to manage affordability crises
- Rising demand for hardship support

STEEPL+V: Economic
Molitor: Framing



Wikimedia Commons
Photograph of sparsely stocked or partially empty supermarket shelves.

Labour shortages among areas traditionally dependent on migrant labour

Public services have been strongly reliant on migrant labour, and currently face workforce shortages in some areas

STEEPL+V: Economic
Molitor: Advancing

Many sectors still depend on migrant labour, especially where roles are hard to fill or poorly paid, such as care work or the frontlines of the NHS. At the same time, migration as a political and media issue continues to shape public policy on employment of migrants and paths to citizenship

This creates a fragile labour base in care, food systems, construction and hospitality, with subsequent effects on service continuity and local economies. The Royal College of Nursing has warned that the tightening of restrictions on people with migrant visas could lead to departures of internationally-trained nurses.

Signals:

- Persistent vacancies in sectors that rely on migrant workers
- Tighter migration rules alongside labour shortages
- Greater use of temporary visas or short-term recruitment fixes



Source; Metin Ozer, via Unsplash
Photograph showing "immigration" text on official-looking documents or paperwork.

Fernández-Reino, M. and Rienzo, C. (2024). [Migrants in the UK labour market: an overview](#)
Savitski, A. (2025) [International recruitment of care workers has ended, the impact may be disastrous](#)

Royal College of Nursing (2025) [Unreciprocated Care: why internationally educated nursing staff are leaving the UK](#)
Brindle, B. and Sumpton, M.(2026) [Migration, vacancies, and labour market skills](#)

Dependency on international student fees has left the HE sector vulnerable and unstable

University business models built around tuition income, especially from international students, are under strain from policy changes, demographic shifts and rising costs.

This is showing up in restructuring, course closures and staff cuts, with wider effects in places where universities are major employers and anchor institutions. At the same time, potential domestic students are less convinced that a degree is worth the time and debt incurred.

Signals:

- University deficits and restructuring programmes
- Course closures or staff reductions
- Greater local exposure where universities are major employers

STEEPL+V: Economic

Molitor: Advancing



Source; Vitaly Gariev, via Unsplash
Photograph of a university or higher education setting with a teacher and students.

Housebuilding continues to fall significantly short of projected need

Housing supply has not kept pace with population change and household formation, leaving a persistent gap between demand and available homes.

New development often concentrates where returns are strongest, which limits the delivery of affordable housing and leaves many households without stable options. The effects build across the system through rising rents, overcrowding, longer waiting lists and greater reliance on temporary accommodation.

Some commentators argue that housebuilding alone will not fill the housing gap, or quickly enough, without action on empty homes and speculative aspects of the housing market.

Signals:

- Housing completions remain below assessed need
- Rents rising faster than incomes in many areas
- Social housing waiting lists remain high

STEEPL+V: Economic

Molitor: Resolving



Source; Clay Banks, via Unsplash
Aerial photograph of houses or residential development.

Barton, C., Wilson, W., Rankl, F. and Panjwani, A. (2023) [Tacking the under-supply of housing in England](#)
BBC (2026) [House-building in London falls by 84% in a decade](#)

Blagden, J (2025) [How to stop Labour's housebuilding plans from crumbling under opposition from the public](#)
Roberts, A. (2023) [Why building on the green belt can't solve the housing crisis](#)

Cities and regions dependent on tourism are feeling the pinch as visitor numbers decline

Places that rely heavily on tourism are more exposed to swings in visitor demand, transport disruption, extreme weather, and general economic instability. The data suggests a decline in domestic tourism, especially to small towns and seaside towns.

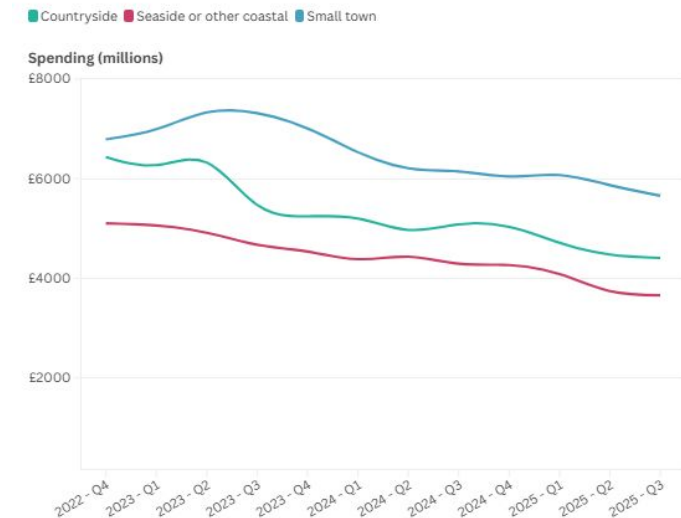
Tourism can bring jobs and income, but it can also leave local economies brittle when those flows weaken or become less predictable. The tourism sector has been affected by higher than average inflation, high energy costs, and the end of temporary rates relief. Tourism however, can also increase local pressure on housing and house prices, low-paid work and public infrastructure.

Signals:

- Sharp fluctuations in visitor numbers and revenue
- Seasonal strain on transport, waste and public space
- Growing concern about dependence on visitor economies

STEEPL+V: Economic Molitor: Framing

Figure 2: Spending on domestic overnight tourism in £millions, by destination type, 12-month rolling totals by quarter



New Economics Foundation (2026)
Line chart showing declining or uneven domestic tourism patterns over time, with different lines for different tourism measures or groups.

Frontline care provision is increasingly dominated by a small number of large private sector providers

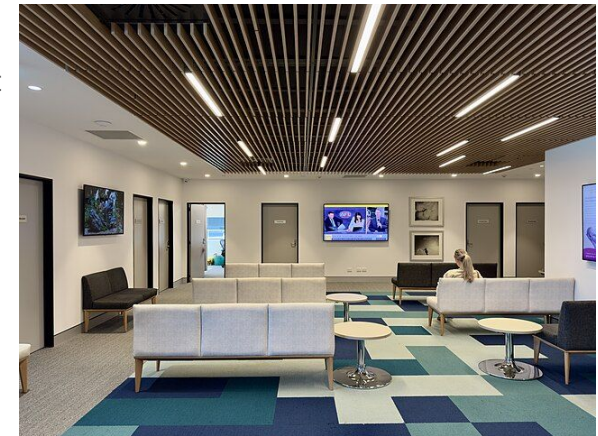
Frontline care is increasingly delivered through large private providers with growing control over capacity, staffing and market access. Smaller providers struggle to compete at the same scale, which leaves whole areas more dependent on a narrow set of firms.

Meanwhile, investigations indicate that private equity investment is also playing a significant role in the sector, driving up prices and paring back quality of service.

Signals:

- Consolidation among major care providers
- Local dependence on a small number of firms
- Provider failure causing wider disruption to care access
- Growing concern about profit extraction in essential care services

STEEPL+V: Economic
Molitor: Resolving



Source; Wikipedia Commons
Photograph of a care home or institutional care setting with seating and interior space visible.



Political

- Rural areas 'left behind'
- Growing interest in Universal Basic Services
- Growing mismatch between local service demands and capacity
- Decline of global 'rules-based' order
- Increasing political party diversity
- Increasing regulatory experimentation
- Marginalisation of coastal towns

Rural areas are older and have greater access issues than urban areas

A quarter of residents in rural areas are 65 or older, compared to 17% in urban areas, with consequences for health and social care budgets. The more rural an area, the older its average age and the faster this is increasing. Employment rates are higher in rural areas, but greater numbers of retirees means a higher proportion of economic inactivity.

Access issues affect rural areas. Young people in rural areas are disadvantaged by greater travel distances to further education and to skilled jobs. Although on average incomes in rural areas are slightly higher than urban areas, this is offset by higher transport costs. While broadband coverage in rural areas is almost complete, access to high-speed internet services lags significantly behind urban areas.

Signals

- rural councils spending ~65% of funding on care
- exodus or “brain drain” as young people leave in search of better opportunities

STEEPL+V: Political Molitor: Advancing



Source; Sergej Karpow, via Unsplash
Photograph of a rural landscape with fields and buildings in the distance.

Increasing economic precarity is boosting calls for a system to ensure that people's basic needs are met

Rising living costs, insecure work and uneven access to essentials are pushing more attention toward guaranteed forms of support, with particular concern over the impact of AI in certain sectors. The question at stake is how much basic security should be provided as a condition of citizenship rather than market success.

Universal Basic Income (UBI) is popular in more libertarian circles, particularly Silicon Valley. Universal Basic Services (UBS), meanwhile, focusses more on place-based service provision, and is gathering support for its broader conceptualisation of welfare.

Signals:

- Pilot schemes or trials linked to guaranteed income
- Policy debate on Universal Basic Services
- Growing public interest in unconditional support models

STEEPL+V: Political

Molitor: Advancing



Source; Marija Zaric, via Unsplash
Photograph of a sign or visual marker reading "Needs."

Local councils bear a growing burden of provision and enforcement, and struggle to resource that responsibility

STEEPL+V: Political
Molitor: Advancing

English local councils are required by statute to provide a range of social services and enforce national laws and regulation. Those requirements are set and (partly) funded by by central government.

Councils are struggling to find the resources to meet the responsibilities that fall to them, whether it be social care provision, the upkeep of schools and roads, or the enforcement of laws against illegal dumping; national agencies and regulators are often unable to help, for much the same reason.

Signals:

- proliferation of illegal waste disposal sites
- road surfaces in declining condition
- schools and care services struggling to deliver



Jonathan Hutchins, CC BY-SA 2.0, via
Wikimedia Commons
*Photograph of illegally dumped tyres or
waste in an outdoor area.*

The global liberal consensus is in tatters as “strongman” leaders and unilateral action reshape the geopolitical map

International politics is becoming more fragmented and less predictable as major powers contest the rules, institutions and norms that shaped and defined the post-war order.

Trade, security and diplomacy are increasingly decided on the basis of rivalry, selective alignment and short-term interest, rather than stable shared frameworks. For smaller, less influential countries, this means difficult choices, balancing values with pragmatic concerns – and turbulent uncertainty due to the choices of others.

Signals:

- sanctions, export controls, trade disputes, wars
- weakening of multilateral institutions and agreements
- a reversion to bilateral or bloc-based deals and diplomacy
- rising concern about spillover from geopolitical conflict

STEEPL+V: Political
Molitor: Resolving



Source; Carnegie (2024)
Illustration of hands pulling at or dividing a globe.

Challenger parties are broadening the political map, and political realignment is underway

The broadening of the political map of the UK has been ongoing for some time. These changes are similar to those seen in Europe, where once-dominant incumbents around the political center have been bleeding support to insurgents on either flank, because traditionally dominant parties have been ineffective in responding to voters' concerns.

The process has been slowed and disguised by the UK's "first past the post" (FPTP) electoral system, but FPTP may also be exacerbating the underlying driver – namely, a sense that the government is not representative of the electorate.

That feeling, among others, is fuel to the challenger parties – but also their main obstacle to success.

Signals:

- major by-election upsets
- changing character and policy platforms among challenger parties
- strong fluctuations in party membership numbers

STEEPL+V: Political
Molitor: Advancing



Phil Hearing, Unsplash
*Photograph of a polling station sign
beside a road.*

National Centre for Social Research (2024)
[Identity issues now a key dividing line in Britain's politics](#)
Curry (2026). [Populism is an information problem, but not in the way that you think](#)

Beckett, A. (2025). [Britain's two-party politics is fragmenting: what unintended consequences await?](#)
Menon, A. (2026) [Back to the future? British politics in 2026](#)

As regulation struggles to keep pace with innovation – or holds it back – new flexible approaches are in demand

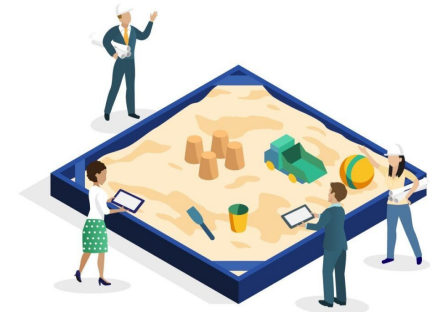
Regulators are showing more interest in controlled experimentation where law and oversight struggle to keep pace with technological change. Regulatory “sandbox” approaches allow new products, services or rules to be tested in limited settings before wider rollout.

These ideas are gaining appeal in areas where policymakers want quicker learning without committing too early to full approval or outright restriction. At the same time, it is argued that a more “hands-off” approach to public service provision might enable innovation, efficiency and cost savings.

Signals:

- regulators launching testbeds or pilot frameworks for new technologies
- industry calls for more adaptive oversight
- growing calls for increased council autonomy and relational service provision

STEEPL+V: Political Molitor: Framing



Source; Ingredients for the Bioeconomy (I4BE) (2025)
Illustration of a small testbed or sandbox-like scene with people, tools and experimental elements.

Years of political and economic neglect have left Britain's coastal towns run-down and dispirited

STEEPL+V: Political
Molitor: Resolving

Many English coastal towns have experienced long periods of economic decline, weak investment and shrinking opportunity. The challenges of seasonal economies and ageing populations are compounded by weaker transport links, poorer services and limited political attention.

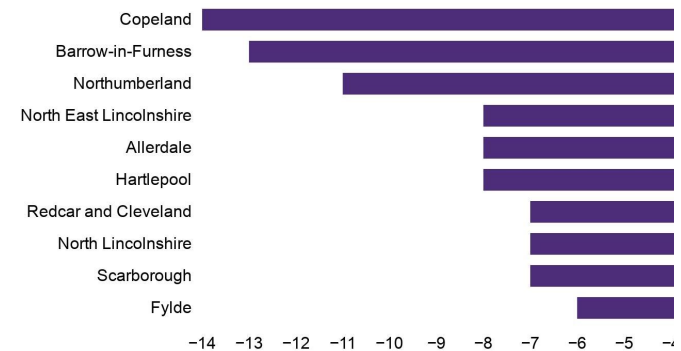
The result is a pattern of places that remain highly visible in cultural terms while being treated as peripheral in economic and policy terms. Depopulation, especially among young people, is a clear trend.

Signals:

- Weak local labour markets outside seasonal tourism
- Poorer transport links and reduced access to services
- Persistent physical decline in town centres and seafront areas
- Repeated concern about underinvestment in coastal communities

Under 30s population decline on the coast

Projected percentage (%) change between 2019 and 2039



Source: Office for National Statistics

Source; BBC (2019) England's seaside towns where young people might disappear

Horizontal bar chart showing population decline among under-30s in selected coastal towns. Longer bars indicate larger projected declines of young people are leaving some coastal towns.



Legal

- Planetary boundaries shape legal and policy decisions
- Accountability of digital systems
- New online financial systems
- Growing expectations of good civic space
- Criminal justice system under strain

Planetary boundaries are shaping legal and policy decision-making

L1

The limits of the planetary ecosystem are starting to shape policy decisions at international and national levels

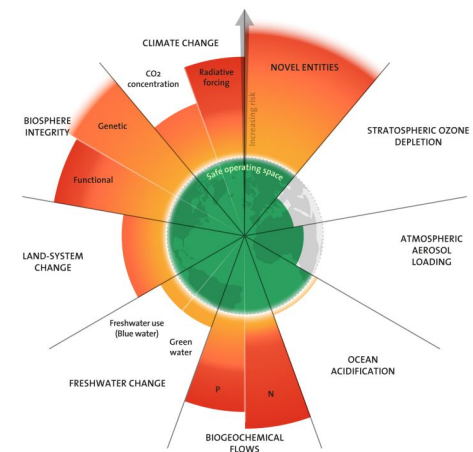
While still strongly contested in many contexts, the ecological understanding of life on Earth has made significant inroads into politics at global and national levels: there are limits to resource consumption and pollution which, if crossed, will result in environmental degradation.

Those implications are influencing policy decisions – sometimes directly, in the cases of countries facing imminent hazards from the already-changing climate, but also indirectly, as populations with increasingly pro-environmental attitudes apply pressure to their governments.

Signals:

- growing popularity and influence of alternative economic models, e.g. "doughnut" economics (Raworth et al), wellbeing economics
- integration of planetary / ecosystemic boundaries into multilateral and national policy frameworks
- populations generally more approving of efforts to mitigate climate change

STEEPL+V: Legal Molitor: Framing



Source; Global Landscapes Forum (2025). The 2025 update to the Planetary boundaries Circular planetary boundaries diagram with colour-coded segments radiating from the centre showing that several segments extend outward into higher-risk zones.

Gifford, L., Liverman, D., Gupta, J. and Jacobson, L. (2023) [Governing for a safe and just future with science-based targets: opportunities and limitations](#)

Webster, E. (2025) [Earth system disruption, legal development and the company: a UK perspective](#)

Raworth, K. (2017) [Doughnut Economics](#)

Global Landscapes Forum (2025) [The 2025 update to the Planetary boundaries](#)

The distribution of agency and responsibility across complex sociotechnical systems can obscure accountability for decision-making

Digital networks, collective action, and decentralised governance are prompting new models of shared responsibility, attribution, and redress across public and private sectors.

Digital systems show some promise for opening up democratic processes to increased participation. The technological system known as “the blockchain” even claims to support “trustless” processes of decision-making and exchange.

However, the need for trust in such systems does not disappear; rather, it migrates further up the chain, to their designers and programmers. Meanwhile, for service users, “computer says no” is an all too familiar story.

Signals:

- responsibility for decision-making increasingly hard to identify
- growing obstacles to speaking with human representatives
- trust in “tech”, and in general, is eroding

STEEPL+V: Legal
Molitor: Framing



Source; [appshunter.io](https://www.appshunter.io), via Unsplash
Photograph of a smartphone showing an “I voted” style screen or voting-related digital interface.

Financial regulation is lagging behind online credit and cryptocurrencies

Digital currencies, peer-to-peer finance and platform-based lending are widening the ways people can borrow, transact and store value. These systems can open access for groups excluded from mainstream finance, but they also shift risk into less regulated and less stable spaces.

The appeal of these risky alternatives is in turn a function of sustained economic precarity: by analogy, they are the loan-sharks of an increasingly cash-free society. The connection of easy credit and cryptocurrencies to online gambling, betting and gaming compounds the risks.

Signals:

- growing presence and popularity of online credit services e.g. Klarna
- lingering interest in local currencies, credit unions
- cryptocurrency “wallets” and exchanges becoming more user-friendly
- increasing popularity of online gambling, gaming and “prediction markets”

STEEPL+V: Legal

Molitor: Advancing



Source; Rodion Kutsaiev, via Unsplash
Image of currency symbols, including euro, dollar and pound signs, on a green background.

Growing expectations around “the right to the city” and good civic space

Citizens increasingly assume a right to occupy and make use of healthy, functional shared public spaces

STEEPL+V: Legal

Molitor: Resolving

The concept of “the right to the city” came from sociologist Henri Lefebvre, and has been taken up globally as a general slogan that covers a demand for urban spaces that are more inclusive, accessible and democratic.

The right to the city also describes a general trend in which people want their cities and towns to be pleasant, healthy spaces where they can enjoy themselves. There is also a growing body of evidence that good public spaces improve health and social outcomes.

Signals:

- post-pandemic persistence of outdoor service at bars and restaurants
- increase in number of urban festivals
- popularity of parks and public spaces growing



Source; Sustrans (2023)

Photograph of people sitting and spending time in a public urban space, with buildings and street features visible.

Colau, A. (2016) [After Habitat III: a stronger urban future must be based on the right to the city](#)

UN Habitat (2025) [Healthier cities and communities through public spaces](#)

Beaumont, C. (2025) [The power of public spaces in placemaking](#)
CABE Space (n.d.) [The Value of Public Space How high quality parks and public spaces create economic, social and environmental value](#)

Criminal justice system under strain from overload and reduced funding

L5

Courts, prisons and rehabilitation systems are unable to cope with demand, and the resulting failures are eroding trust in justice

STEEPL+V: Legal
Molitor: Advancing

The criminal justice system in England is increasingly unable to cope with the demands placed upon it. This is resulting in long delays and mistakes in the processing of cases, as well as highly visible failures and miscarriages of justice.

These failures are in turn eroding public trust in the justice process overall. Further cuts in services, while intended to save money and prioritise the most important cases, may serve to accelerate that process of erosion.

Signals:

- significant and growing backlog of criminal cases
- proposals to restrict access to trial by jury for some cases
- rapidly declining public trust in courts and police



Source: Conny Schneider, via Unsplash
Image of a legal symbol, with a paragraph sign and scales of justice.

Gallup (2025) [Britons' Trust in Courts and Police Declines](#)
BBC (2025) [Jury trials scrapped for crimes with sentences of less than three years](#)

Independent (2023) ['Overwhelmed' justice system failing victims of crime, CPS chief warns](#)



Values

- Reconfiguration of media channels
- Civic discourse becoming fragmented
- Politics splitting by gender and generation
- Reconfiguration of cultural identity

Reconfiguration of media channels amplifies more marginal voices and positions

V1

Electronic media continue to reconfigure not just the form of communications, but also access to audiences

Among the many effects of the rise of digital and social media is a levelling of the discursive playing-field. In a world where anyone with a laptop or smartphone can broadcast their thoughts, marginal and even extreme positions face far fewer barriers to being heard.

In the short run, at least, this is doubly to the advantage of marginal positions: they have gained access, and their marginality comes with a sense of novelty or transgression, while more mainstream positions look tired and “mid” by comparison.

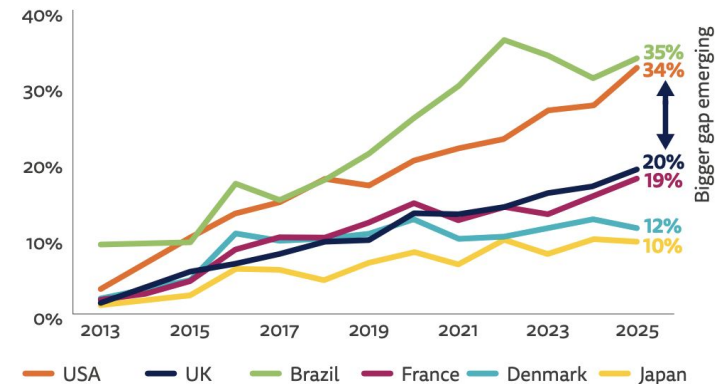
Signals:

- growth in marginal and extremist influencers on social media
- mainstream parties under attack from both flanks by insurgent ideas
- spectacle increasingly essential to capturing audience attention

STEEPL+V: Values / Ethics

Molitor: Advancing

PROPORTION THAT SAY SOCIAL MEDIA IS THEIR MAIN SOURCE OF NEWS (2013-2025) - SELECTED COUNTRIES



Source: [Reuters Institute Digital News Report \(2025\)](#)

Line chart showing the proportion of people who say social media is their main source of news across selected countries and age groups. The lines rise over time, especially among younger groups.

Ifj.org. (2025) [Reuters Digital Report 2025: Falling trust and the rise of alternative media ecosystems](#)
Seipp, T.J., Helberger, N., de Vreese, C. and Ausloos, J. (2023). [Dealing with Opinion Power in the Platform World: Why We Really Have to Rethink Media Concentration Law](#)

Shahin Nazar Kermanshahi, Iris, Dirks, S., Overkempe, T., Hardman, L. and Pieters, T. (2024). [Re-Mediatization as a New Digital Approach Towards Local Political Deliberation: Using Real-Time Participatory Media Production to Bring Nuance to Public Debates on Religion, Sexuality, and Migration](#)

Civic discourse is becoming fragmented, fast-moving, and post-literate

V2

Governments no longer control a dominant channel of communications, and must spread messages in different languages and media

Public debate is now shaped by a media environment that is faster, more distributed and less anchored in a small set of shared institutions. People encounter news, commentary and evidence through platforms, creators and peer networks as much as through formal journalism.

This presents challenges for government, where communication strategies were based on reliable access to top-down, one-way channels of distribution. The new media environment demands new skills and new language – and is teeming with counter-messages and critique.

Signals:

- News increasingly consumed through social and messaging platforms, rather than newspapers or terrestrial TV
- Creator-led commentary and informal explainers growing more popular
- Wider use of video, memes and screenshots in political communication

STEEPL+V: Values / Ethics

Molitor: Advancing



Source; The Baffler (2025) We Used to Read Things in This Country
Black-and-white illustration of a person reading or interacting with printed material in a stylised media environment.

Younger cohorts are more progressive than older, but the gap between young women and young men is widening

The enduring trend across generations is that younger cohorts are reliably more progressive in their outlook than older cohorts. While this may have slowed somewhat, it shows little sign of reversing.

However, the story becomes more complex among the youngest cohorts, where a clear separation is occurring along gendered lines: young women are generally becoming ever more progressive, while young men are starting to lean toward more conservative positions by comparison.

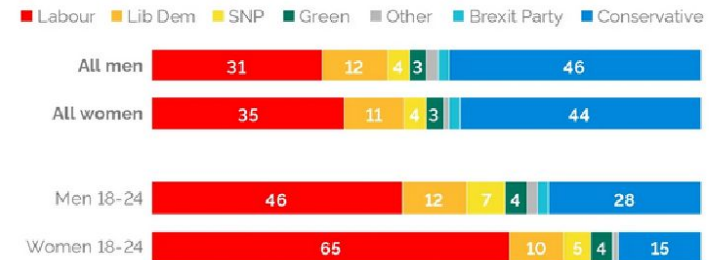
Signals:

- resurgence of feminist politics among young women
- growing influence of (and concern about) "the manosphere"
- clear generational gaps in political attitudes

STEEPL+V: Values / Ethics
Molitor: Advancing

Vote by age and gender

% of 41,995 adults who voted at the 2019 general election



Source: John Smith Centre (2024), Are young women and young men in the UK heading in different political directions?
Stacked bar chart showing voting preference by age and gender. The bars compare younger and older men and women, showing different party preferences across gendered and generational groups.

Notions of identity and belonging are less governed by loyalty to class or place, and more by new affinity groups

Identity has undergone considerable change in recent years. In the UK, this is most clearly seen in the falling away of class- and place-based identifications, and their replacement by more granular senses of self based on ethnicity, sexuality and gender, generational cohort, and other forms of cultural affinity.

These new groupings generate shared cultures and value systems, and provide a sense of belonging in a context of social atomisation and precarious employment. Meanwhile older generations, still attached to earlier and more totalising identities, feel their own sense of belonging to be marginalised or even threatened.

Signals:

- Increased visibility of (and hostility to) different identifications around sexuality and gender
- Online socialisation increasingly oriented around specific interests or ideals
- Formerly dominant groups adopting rhetorics developed in minority groups

STEEPL+V: Values / Ethics

Molitor: Advancing



Source: Hannah Wright, via Unsplash

Photograph of a wall with multilingual or layered writing and signs.



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