

# Understanding a Divided Britain - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- The impact of COVID-19 on divisions in British society.
- The size and makeup of the British population, including different demographic groups.
- Individuals' political orientations and preferred geographical identities.
- The impact of differences in political orientations and other divisions on personal values and what consumers believe Britain should be a global leader in.
- Consumers' attitudes towards Britain, including whether they are proud to live in Britain, whether it is considered a tolerant country, and the strength of Brand Britain.
- The state of the national conversation and the sources of information Brits trust to keep them informed.

Just 14% of British consumers call themselves British, with people more likely to identify with the home nation they live in – particularly in Scotland and Wales – or the city, town or village they live in. For consumer-facing businesses, this shows the benefits of a local approach to advertising and embedding their brands in local areas to build deep customer relationships.

In the early months of the COVID-19 pandemic, the shock of the impact on public and private life had the effect of bringing people together, perhaps most prominently seen in the success of the Clap for Heroes initiative. While divisions have arisen over the response to the coronavirus, the fact that the vast majority of people still support mask-wearing in outdoor settings indicates greater unity than is perhaps suggested in news and social media reports, especially.

Arguably the biggest threat to social cohesion in today's Britain is the rise of disinformation and distrust in mainstream news media. TV and newspapers remain the most trusted sources of information across politics, business and the



"Britain is home to a plethora of identities, social and political viewpoints and beliefs. Despite this, most people agree that it is a country they are proud to call home and that most Brits live according to a shared set of values. There are, however, disagreements over what Britain should stand for as a country."

**- Rich Shepherd, Category Director – B2B, Social and Economic Research**

## Buy this report now

|          |                      |
|----------|----------------------|
| Visit    | store.mintel.com     |
| EMEA     | +44 (0) 20 7606 4533 |
| Brazil   | 0800 095 9094        |
| Americas | +1 (312) 943 5250    |
| China    | +86 (21) 6032 7300   |
| APAC     | +61 (0) 2 8284 8100  |

## Understanding a Divided Britain - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

economy, and health issues, but around a third of consumers say they do not trust any surveyed information source to inform them about these issues.

There are still many opportunities for businesses to capitalise on Brand Britain, however. Three quarters of consumers are proud to call Britain their home and think British businesses should promote traditional British values.



### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Table of Contents

### OVERVIEW

- Key issues covered in this Report
- COVID-19: market context
- Economic and other assumptions

### EXECUTIVE SUMMARY

- **Impact of COVID-19 on social cohesion**  
Figure 1: Short, medium and long-term impact of COVID-19 on social cohesion, August 2021
- **The market**
- **Britain is home to an ageing population**  
Figure 2: UK population pyramid, by age and gender, mid-2020
- **Average earnings continue to rise but not for all**  
Figure 3: Average weekly earnings total and annual change, and CPIH, 2001-20
- **The consumer**
- **Most Brits sit somewhere near the political centre**  
Figure 4: Political orientation, 2021
- **Britishness is a minority identity**  
Figure 5: The geographic region people most strongly identify with, by region, 2021
- **Family, health and financial security are most important concerns**  
Figure 6: Most important issues for individuals, 2021
- **Britain means many different things to different people**  
Figure 7: What people want Britain to be a world leader in, 2021
- **A strong sense of national pride**  
Figure 8: Attitudes towards Britain, 2021
- **TV is the most trusted news source**  
Figure 9: Trusted sources of information for political, economic and health issues, 2021

### ISSUES AND INSIGHTS

- Political orientation has a major bearing on personal priorities
- Highlighting multiple aspects of Britain can reach across divides
- Strong belief in Brand Britain

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## THE MARKET – KEY TAKEAWAYS

- **COVID-19 has shaped population changes...**
- **...and widened financial inequality**
- **An ageing, increasingly multicultural population**
- **Divisions show up in voting patterns, but class has lost influence**

## THE BRITISH POPULATION

- **UK population topped 67 million in mid-2020...**  
Figure 10: Mid-year UK population estimates, by nation, 2011-20
- **...and continues to age**  
Figure 11: UK population pyramid, by age and gender, mid-2020
- **International migration heavily impacted by the pandemic...**  
Figure 12: Mid-year UK international migration estimates, 2011-20
- **...while internal movement also dipped**  
Figure 13: Mid-year UK net internal migration estimates, by nation, 2016-20
- **England is significantly more diverse than other UK nations**  
Figure 14: Proportion of the population in each ethnic group, by country, 2011 UK Census  
Figure 15: Proportion of the population in each ethnic group, by English regions, 2016
- **Younger groups are more diverse, promoting inclusion**  
Figure 16: Proportion of the population in each ethnic group, by age, England, 2016
- **Almost half of British adults have graduated from higher education**  
Figure 17: Highest educational achievement by people in the UK aged 20-65 not enrolled on any educational course, 2017

## INCOME AND WEALTH

- **Average earnings continue to rise...**  
Figure 18: Average weekly earnings total and annual change, and CPIH, 2001-20
- **...but the worst off are falling behind**  
Figure 19: Median equivalised household disposable income, by quintile group, 2010/11-2019/20
- **Household incomes vary greatly**  
Figure 20: Gross annual household income, 2021
- **Almost two thirds own their own home**  
Figure 21: Housing situation, 2021

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

|          |                      |
|----------|----------------------|
| Visit    | store.mintel.com     |
| EMEA     | +44 (0) 20 7606 4533 |
| Brazil   | 0800 095 9094        |
| Americas | +1 (312) 943 5250    |
| China    | +86 (21) 6032 7300   |
| APAC     | +61 (0) 2 8284 8100  |

## Understanding a Divided Britain - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- **House prices rose by 49% in the decade to April 2021**

Figure 22: Average house prices and annual growth in average prices, 2010-21

### HOW BRITAIN VOTES

- **Conservative vote share has grown for four straight General Elections**

Figure 23: UK General Election results by share of votes, 1992-2019

Figure 24: UK General Election results by share of seats, 1992-2019

- **Age, wealth, education and continue to split voters**

Figure 25: UK general election vote shares, by demographics, 2019

- **Brexit continues to divide**

Figure 26: Level of concern over the impact of the EU referendum, 2016-21

Figure 27: Consumer views on the impact of the EU referendum, 2021

- **Voting map highlights multiple divides across the UK**

Figure 28: Map view of 2019 UK General election results

- **Rise of the SNP has radically altered the Scottish political landscape**

Figure 29: UK General Election results by share of votes, Scottish constituencies only, 1992-2019

- **Multi-party popularity was short-lived in England**

Figure 30: UK General Election results by share of votes, English constituencies only, 1992-2019

- **Surging support for the Tories but Labour maintains a Welsh majority**

Figure 31: UK General Election results by share of votes, Welsh constituencies only, 1992-2019

### THE CONSUMER – KEY TAKEAWAYS

- **Despite new divisions, most have supported COVID-19 measures**
- **Britain skews to the right, but most people cluster around the middle**
- **Family, health and financial security are most important concerns**
- **The environment is a politicised issue**
- **Britishness is a minority identity**
- **Britain means many different things to different people...**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Understanding a Divided Britain - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- **...but most are proud to call it their home**

### IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **Consumer anxieties trace pandemic waves**  
Figure 32: Mintel COVID-19 exposure anxiety and lifestyle impact index, 28 February 2020–17 August 2021
- **Support for masks has fallen but remains very high indoors**  
Figure 33: Support for face mask wearing, by setting, 9–17 August 2021

### POLITICAL ORIENTATION

- **Most Brits sit somewhere near the political centre**  
Figure 34: Political orientation, 2021
- **Older groups are more likely to lean to the right...**
- **...but the age trend is not completely straightforward...**
- **...while many are unclear on where position on the political spectrum**  
Figure 35: Political orientation, by gender and age, 2021
- **Right-wing views are more common in England**  
Figure 36: Political orientation, by region, 2021

### GEOGRAPHICAL IDENTITY

- **Scottish and Welsh identities more keenly felt than Englishness**  
Figure 37: The geographic region people most strongly identify with, by region, 2021
- **Britishness is a minority identity everywhere**
- **Civic pride and village community, but towns lack local identities...**  
Figure 38: The geographic region people most strongly identify with, by area, 2021
- **...while migrants are more likely to align with broader identities**  
Figure 39: The geographic region people most strongly identify with, by whether or not they live in the same region they were born, 2021
- **Right-leaning people more likely to identify with their local area**  
Figure 40: The geographic region people most strongly identify with, by political orientation, 2021

### PERSONAL VALUES

- **Family, health and financial security are most important...**
- **...but personal values are still shaped by political views**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

|          |                      |
|----------|----------------------|
| Visit    | store.mintel.com     |
| EMEA     | +44 (0) 20 7606 4533 |
| Brazil   | 0800 095 9094        |
| Americas | +1 (312) 943 5250    |
| China    | +86 (21) 6032 7300   |
| APAC     | +61 (0) 2 8284 8100  |

## Understanding a Divided Britain - UK - 2021

Report Price: £2195 | \$2995 | €2600



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 41: Most important issues for individuals, by political orientation, 2021

- **Mental health is a mainstream concern**
- **Under-35s' focus on careers can dampen climate action**

Figure 42: Most important issues for individuals, by age 2021

- **Charities most likely to succeed with local appeals**
- Figure 43: Most important issues for individuals, by the geographic region people most strongly identify with, 2021
- **'Brits' have more traditional concerns**

### BRITISH VALUES

- **Strong demand for Britain to lead on tackling climate change**

Figure 44: What people want Britain to be a world leader in, by political orientation, 2021

- **Tech is key to those on the right, while equality is a left concern**

- **Men and women have significantly different interests**

Figure 45: What people want Britain to be a world leader in, by gender, 2021

### ATTITUDES TOWARDS BRITAIN

- **A strong sense of national pride...**

Figure 46: Attitudes towards Britain, 2021

- **...but wanes among the most pro-European**
- **Community isn't dead...**

Figure 47: Agreement that there is a strong sense of community where individuals live, by current financial situation, 2021

- **...and most think Brits share a set of values**
- **Gen Z are most sceptical about Brand Britain**

Figure 48: Attitudes towards Britain, by generation, 2021

### THE NATIONAL CONVERSATION

- **Most people are willing to discuss sensitive topics**

Figure 49: Attitudes towards Britain, by age, 2021

- **TV is the most trusted news source...**

Figure 50: Trusted sources of information for political, economic and health issues, 2021

- **...but around a third distrust all surveyed sources**
- **Trust in politicians leaves a lot to be desired**
- **A fifth of Gen Z and Millennials lean on social media for information**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Understanding a Divided Britain - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 51: Trusted sources of information for political, economic and health issues, by generation, 2021

### APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100





## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.