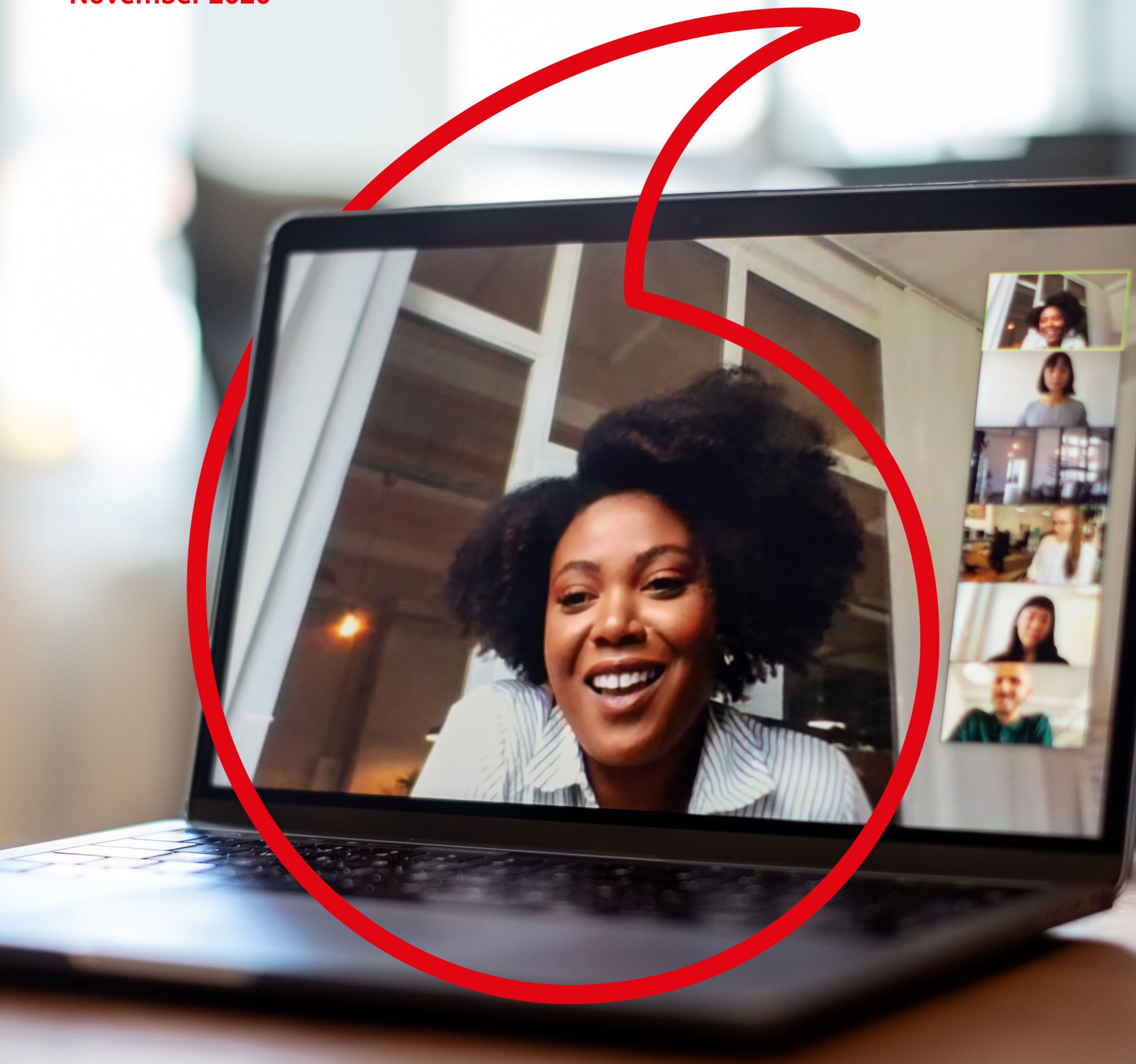


Loneliness 2030

Overcoming loneliness and
social isolation in the UK

November 2020



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Foreword

Loneliness and social isolation can be devastating for our mental and physical health – and unfortunately, it’s an experience that’s becoming more common in the UK. But by understanding what’s behind loneliness, we can take action to tackle it.

This report explores what drives loneliness in the UK and how the next decade could unfold based on current trends – if we don’t take action. Using a rigorous programme of trends analysis, horizon scanning, expert interviews and scenario planning, experts in future consultancy Trajectory have created a forecast for the years ahead.

With this insight, we outline what lies in store for society by the year 2030, depending on our choices today - and propose recommendations for the best possible outcome.

The actions of government, businesses, the third sector and individuals can reduce social isolation and improve the nation’s quality of life. There are vital steps we can take together to choose a happier, more connected future but we must work together now to ensure that the issue of loneliness doesn’t become insurmountable.

Helen Lamprell
General Counsel and External Affairs Director,
Vodafone UK



Introduction

In 2020, we have all been given greater insight into isolation and loneliness due to the Covid-19 pandemic.

But for many people, this is a familiar experience. Social isolation is a chronic issue in the UK that doesn't discriminate by age, gender, race or socio-economic background.

It's linked to mental and physical health issues such as depression and dementia and studies have shown it can be [more dangerous to our health than obesity](#).

It's vital that we understand the drivers behind loneliness and isolation and what's ahead in the next decade, so that we can better support vulnerable and isolated people now and in the future.

This report explores what is driving loneliness and social isolation in the UK, and predicts its impact on society by 2030 – depending on the actions we take today.

Trajectory, a specialist futures consultancy, has used trends analysis and horizon scanning to identify three possible futures for the UK over the next decade. One is the most likely – our current path – while there is also a brighter path and a darker one. All will be dictated by the actions we make now.

Government, businesses and the third sector must take steps to continue to help the vulnerable and isolated, address loneliness and bridge the digital divide.

Technology also has a key role to play. During Covid-19, we've all felt the true value of connections more than ever before.

Taking steps to address loneliness

- **Government:** Keep loneliness on the agenda, focus on helping the most vulnerable and isolated and connecting the nation
- **Business:** Adapt to the new normal, digitise internal processes and support local communities
- **Third sector:** Adapt to new ways of volunteering, work with communities and build a positive legacy from 2020

Many of us have benefitted from engaging with friends, family, colleagues, support and society at a distance.

However, some people are cut off and unable to access the technology and connectivity they need.

Helping vulnerable and isolated people must also mean bridging the digital divide. By maximising digital inclusion, we can ensure everyone has the skills and tools to stay connected.

Vodafone's brand purpose is to connect people for a better future. True connectivity isn't just about super-fast 5G – it's about feeling emotionally connected to friends, family and our communities.

As a nation, through Covid-19, we have broken down many barriers and connected with what truly matters to us.

Our challenge now is to keep those connections alive and galvanise community spirit, to keep connecting and take us forward into a positive future.



Understanding loneliness in the UK

Both loneliness and social isolation are relatively common in the UK, but they are distinct things.

Social isolation, which many of us experienced during the Covid-19 lockdown, involves reduced social contact and fewer interactions. But for many people, it's a continuous state of being.

Loneliness, on the other hand, can happen even when we're surrounded by other people. It's the feeling of being unheard or unconnected – even in a busy household, city centre or place of work.

By understanding the trends driving loneliness and social isolation in the UK today, we can explore the likely impact during the decade ahead and make recommendations on how we can achieve the most positive resolution.

65+ Challenging the stereotypes

It's often assumed that loneliness disproportionately affects older people, but in fact this isn't true. People over 65 are actually the most likely to say they never feel lonely. Older people may be at greater risk of isolation – for example, if health conditions reduce someone's mobility – but this doesn't automatically result in loneliness.

However, raised mortality can drive greater loneliness for this age group, as people might be impacted by the loss of partners or friends.



New ways of working may drive loneliness in young people

Overall, younger people are much more likely to feel lonely – [9% of 16-24s and 7% of 25-34s report always or often feeling lonely](#). Over the next decade, new ways of working – in part driven by the pandemic – will be a major contributor to loneliness in these age groups. Moving to home working means younger people will often spend significant time on their own, rather than in busy offices.

The 2020s are also likely to see the continuing rise of self-employment and gig economy working. These jobs can provide flexibility and autonomy but often also mean a lot of time spent alone. Delivery and transport jobs might provide lots of shallow, brief interactions but don't build the deeper relationships that people need.



Beyond the high street: new kinds of community

High streets and town centres will almost certainly continue to decline as retail hotspots, which is a trend that has been accelerated by the pandemic. However, this doesn't mean that new kinds of community can't be fostered in their place.

Following the pandemic and lockdown, more people are working from home, giving commuter towns a



Based on the trends driving loneliness today, it's possible to predict where we will be by 2030.



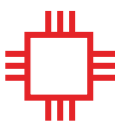
different weekday identity. This has also brought us closer to our neighbours and neighbourhoods, and sparked new initiatives to support those in our communities that need help. If we can reflect this attitude in public spaces and high streets, then we can create a stronger sense of local identity.



Importance of health

Some physical health conditions are inherently isolating and the number of people with long-term, chronic conditions will increase as the population ages over the next decade. This presents a real risk for increased loneliness and isolation, especially amongst older generations.

Mental health is critically important too, and another area where the legacy of the pandemic, lockdown and social distancing measures might be felt for years to come – particularly among younger people.



Technology: both a help and hindrance for the years ahead

The pandemic has accelerated our dependence on digital technology. Video calls have been a lifeline for businesses operating without an office. As illustrated during lockdown, digital tech can also play a vital role in connecting those that might otherwise feel lonely or be isolated.

Over the next decade, the expansion of the Internet of Things (IoT) and Artificial Intelligence (AI) can strengthen this connecting power, building on the foundations of a new 5G network.

IoT and AI can give health or social care providers much better knowledge about the real-time needs of vulnerable people. Spending and activity patterns could allow services to identify when people are likely to require extra support, preventing isolation and acute need.

Despite the innate power of technology to connect us, if it's not used properly it can promote loneliness and create a higher number of vulnerable and isolated people. Social media use among young people can lead to negative self-esteem and unrealistic expectations of relationships and friendships.

Likewise, while video calls and messaging apps have been important during social isolation, they aren't a substitute for face to face contact. Recognising how technology can help and how it can hinder will determine future levels of loneliness.



Looser relationships everywhere

In many walks of life, the ties that bind us together are slowly, but steadily, loosening. For example, we tend to live longer and have fewer children, so families have more generations, with fewer people in each. This means that people are likely to have fewer siblings and cousins that they might spend time with, particularly in their older age.

Another example is religion. The UK is becoming gradually more secular, so the traditional social tie of a weekly religious service is less likely to be a feature of people's lives. People are also more likely to move around the country – or further afield – so our ties to a particular place might be weaker than in the past.

All these forces slowly raise the risk of people becoming vulnerable and isolated, as we meet fewer people through the wider patterns of life, and place more pressure on existing friendships.

Likewise, while video calls and messaging apps have been important during social isolation, they aren't a substitute for face to face contact. Recognising how technology can help and how it can hinder will determine future levels of loneliness.



What could the future look like?

Based on the trends driving loneliness today, it's possible to predict where we will be by 2030. This core scenario – or current path – is how loneliness and social isolation are most likely to impact the UK over the next decade, according to where we are now.

However, our actions will determine the future ahead. There is also a brighter scenario – and a darker scenario – depending on the choices taken by society in the coming years.

Each scenario offers a different view of the future and how our experiences of loneliness and social isolation will unfold by the year 2030.



Our Current Path: Individualism and Digitalisation

In the most likely scenario, loneliness in 2030 remains at a similar level to that seen a decade before: the challenges caused by the pandemic have been countered by technological progress, a sustained focus on loneliness from businesses and the third sector and a commitment at government level to help the vulnerable and isolated and keep loneliness on its agenda.

Covid-19 and the impact on the UK

In the most likely scenario for 2030, most social distancing measures were removed in 2021, although some – particularly around non-essential travel, work and advice for the vulnerable – remained in place until a vaccine was rolled out late that year.

The sheer length of time the UK spent in this 'new normal' resulted in some lasting behaviour change, particularly in how we work, our use of technology and health concerns in public spaces.

By the time the vaccine was discovered, the focus had shifted away from the immediate question of how to deal with the pandemic, onto a highly partisan political debate about how the economic damage of 2020-2021 must be paid for.

At this point, optimism for the decade ahead was in short supply, and true to predictions, the 2020s were a decade characterised by sluggish GDP growth, rising income inequality and further reductions to public spending. Despite the economic backdrop, loneliness has kept stable throughout the decade and in 2030 is no higher than it was in 2020.

By 2027 the recovery was well underway and some of the social shifts were positive for loneliness and social isolation. Despite funding challenges the government retained a Loneliness Minister for the entirety of the decade, which in turn signalled to businesses and the third sector the importance of the issue.

Health services increasingly saw value in social prescribing after the pandemic as community initiatives reopened. This both helped individual wellbeing and underscored the value of local third sector programmes for helping the vulnerable and isolated and addressing loneliness.

In combination, these trends laid the foundation for a more individualised and digitalised society.

Three trends that are driving higher conflict and competition, and a more individualised society:

- 1. Fight for resources:** As public spending remained tightly constrained, there was increased competition for funding. This was especially apparent in health, as an ageing society with more long-term chronic conditions necessitated rises to NHS budgets that weren't possible.
- 2. Intergenerational conflict:** With less money in the public pot, different generations – with differing priorities – competed, exacerbating intergenerational conflict.
- 3. Death of distance:** Accelerated by the pandemic, consumers got used to placing less emphasis on physical proximity. More of everything – from work to leisure – was done remotely.



The individualism that has become dominant in society by 2030 was accelerated by the unique circumstances of the 2020 pandemic.

Working from home has become an entrenched normality. This means that the majority of desk-based jobs are done by people working alone, at home. Equally, gig economy work – especially in delivery and transport – is typically solo and precarious.

As families continued to decline in size, and fewer people felt strong affinity to their community, individualism became a dominant force in society. This attitude crept into the approach to public services too: reduced spending meant not only prioritisation between different services, but also a focus on the most urgent cases and needs. In healthcare, this meant resource diverted to acute care and the most prevalent and life-threatening chronic conditions.

Patients with other long-term needs, including physical health needs, like diabetes, or mental health needs, are now generally asked to play a much more active role in the management of their own care to reduce the burden on health services. This results in uneven provision, with many falling through the cracks.

Less time spent on out-of-home leisure and experiences

Changes to the way we live and work mean that in 2030 leisure time is very different to 2020. For many in the population, both where they work and their job security are crucial pillars determining their ability to enjoy meaningful leisure time. Many workers feel isolated at work, unable to make the most of their leisure time, or both.

The challenges at the start of the decade also accelerated the so-called death of the high street. More retail chains decided the cost of operating bricks and mortar stores while also enforcing social distancing at a time of low demand was simply too much. In some parts of the country, these post-retail high streets are rebounding as community driven, leisure spaces but in the majority of towns and cities they are a shadow of their past vibrancy.



Employee wellbeing became a crucial measure of an organisation’s success and a non-negotiable aspect of their CSR strategies.



Maintaining the focus on loneliness

Despite these challenges, helping the vulnerable and isolated and addressing loneliness have remained high on the political and social agenda. The impetus for this came from government, which retained a Minister for Loneliness, symbolising the importance of the issue. Although government funds were in short supply, the mantle was taken up by businesses and charities who have both attempted to directly support vulnerable and isolated people.

Early in the 2020s, savvy businesses recognised that an inevitable result of the shift to remote working was higher levels of vulnerable and isolated people. These employers were proactive: developing processes to help identify those most at risk and setting up initiatives to keep people together even while apart. Virtual break out areas or digital watercoolers – video call rooms kept open all day for staff to drop into chat – became commonplace while managers were encouraged to plan more digital team activities to keep people connected.

As public attention shifted to the mental health damage done by the pandemic, employee wellbeing became a crucial measure of an organisation’s success and a non-negotiable aspect of their CSR strategies. As well as looking after their own employees, business worked more closely with third sector initiatives designed to help rebuild community spaces and networks.

Keeping people connected

The 2020s were a decade of enormous technological progress. By 2030, virtually every new appliance sold is smart and the 5G network is driving exponential

growth in industrial IoT and AI use, developments set to further revolutionise the workplace.

For most people, the real cost of interaction has fallen to record lows and, ultimately, more people are connected than ever before – at least digitally. These developments are starting to plug some of the gaps in health and care provision.

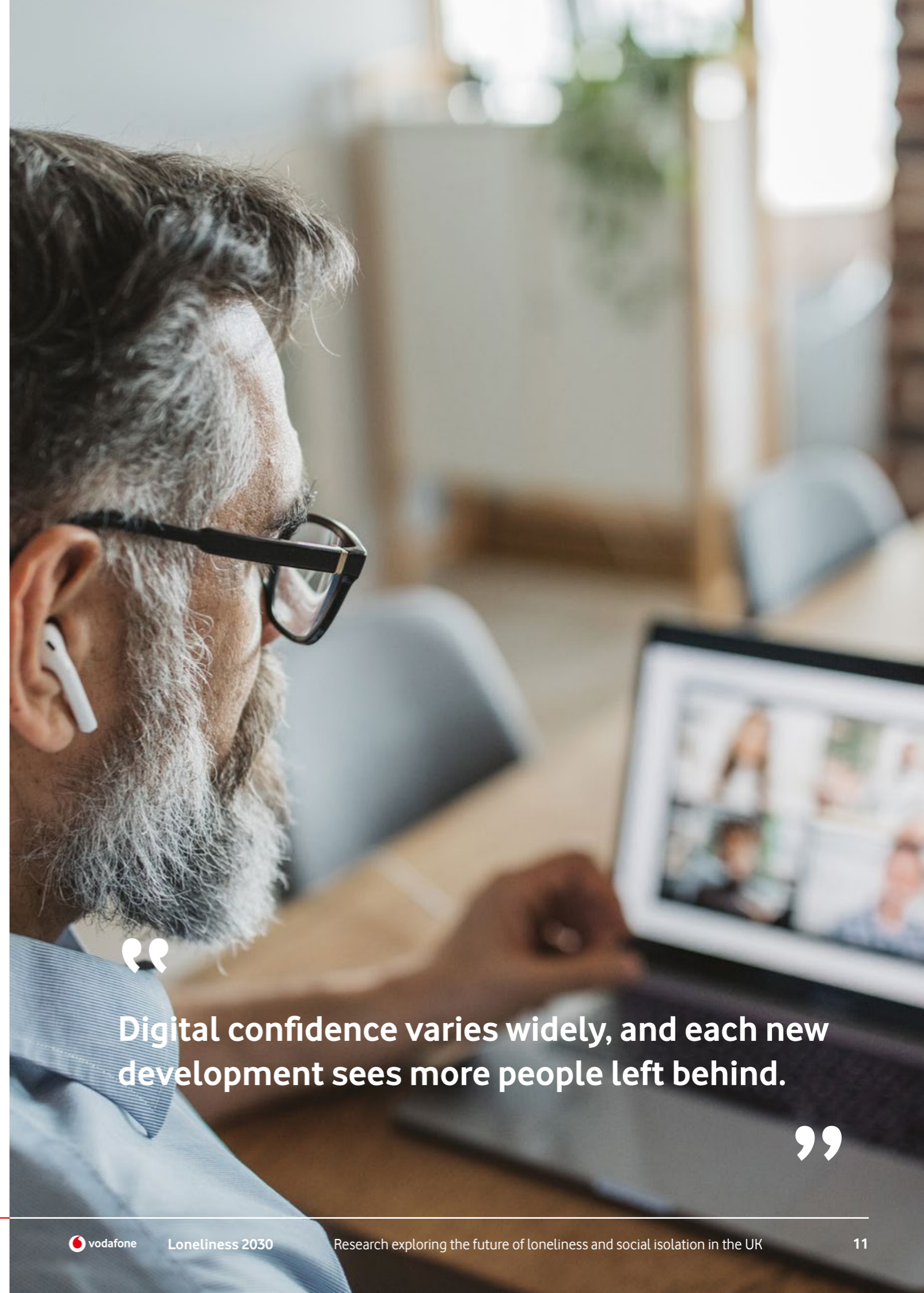
As people are more isolated and society more individualised, more are turning to digital tools to make new connections. The majority of people have at least one close friend they have never met – many more for under-25s – as more socialising takes place online.

This dependence on digital interactions is not a long-term solution against the rising threat of vulnerable and isolated people. Also, while digital access has increased even further, digital confidence varies widely, and each new development sees more people left behind. In the absence of real-world interactions, tech can be a lifeline: but not everyone can connect.

Loneliness stable

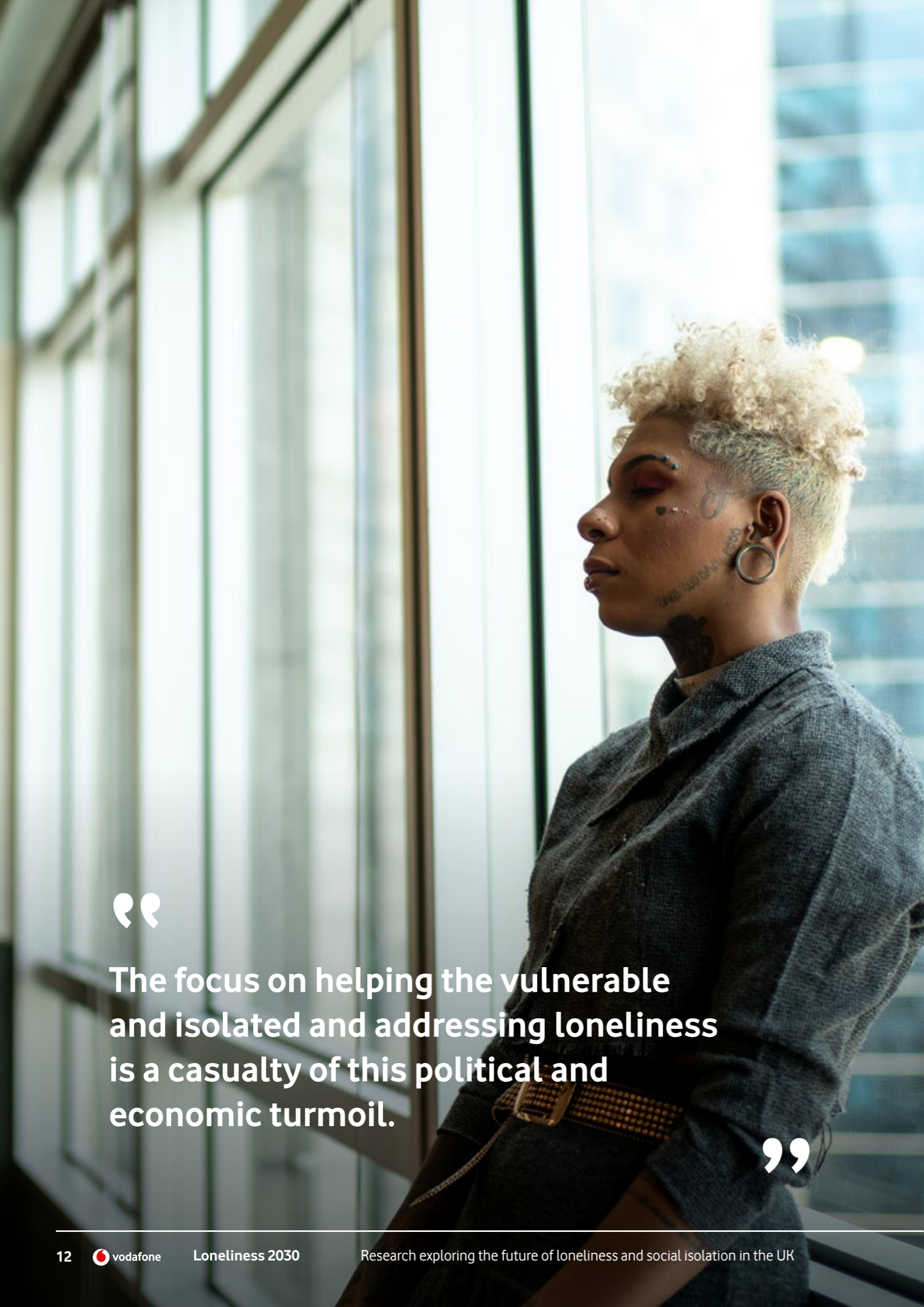
In the last decade the UK has seen growth in strong drivers of loneliness and isolation. The pandemic at the start of the decade accelerated isolating trends, including remote working and declining high streets and leisure opportunities.

But despite this, loneliness is no higher today than it was a decade ago in 2020. Much of this is thanks to the commitment of government, business and the third sector to keeping helping the vulnerable and isolated and addressing loneliness high on the agenda and supporting initiatives to rebuild communities, strengthen staff wellbeing and bring people together.



Digital confidence varies widely, and each new development sees more people left behind.





The focus on helping the vulnerable and isolated and addressing loneliness is a casualty of this political and economic turmoil.



A Darker Path: Loneliness Deprioritised

In a less likely, but more negative, scenario, by 2030, loneliness has spent a decade rising unchecked in the UK. As public finances worsened, businesses focussed only their bottom line while the third sector struggled to recover from the economic hit of Covid-19. Community cohesion, volunteering and social trust all declined leading to rampant social isolation.

Covid-19 devastates the UK

Although a vaccine was discovered and rolled out in 2021, the pandemic devastated the UK. Economically, the UK entered the longest and deepest recession in history, resulting in a massive, long lasting increase in unemployment, deep cuts to public spending and sustained rises in the cost of living for the population. By 2030, the UK is only just starting to pull itself back to pre-pandemic levels; the 2020s are truly a 'lost decade'.

But the economic impact was just one aspect of the hit. Politically, the protracted crisis meant that no post-Covid, or even post-Brexit, consensus could be formed. Each generation and cohort feels the most brutally hit by the crisis, whether in terms of health outcomes, opportunity or income. This divisive mood accelerated social fragmentation: the UK has never felt less together.

Loneliness falls off the agenda

The focus on helping the vulnerable and isolated and addressing loneliness is a casualty of this political and economic turmoil. Drastic cost-cutting resulted in all ministerial portfolios deemed non-essential getting

closed, including the Loneliness Minister.

Health and care budgets were diverted to areas of acute need – usually physical illnesses. Businesses were not immune to these pressures. Record unemployment and job scarcity mean that some businesses deliberately cutback on staff wellbeing and charity initiatives, as wages and job security are employees' top priority.

Communities fragment as the third sector struggles

Charities are also badly affected by the crisis: the recession hit everyone's ability to donate money while volunteering rates suffered. Attempts after the pandemic to address wellbeing issues with social prescribing failed, as a dwindling third sector struggled to match supply with demand. The impact of this has been felt across society, but affected households differently. Younger people have fewer educational, sports and socialising opportunities as youth clubs and local sports clubs have closed. Older people generally spend longer in ill health, with reduced frequency of in-home care. For those without a local family or peer group, retirement can be a prolonged period of social isolation.

Increasing isolation

In this context, the death of distance, fight for resources and intergenerational conflict are even more keenly felt and lead to higher levels of vulnerable and isolated people.

Overall, isolation has increased steadily over the past 10 years, with only sporadic positive developments. The number of vulnerable and isolated people has increased significantly.



A Brighter Path: Stronger Ties

In a much brighter, but less likely, scenario, loneliness in 2030 is lower than in 2020 after a decade of progress. After the economic and social shock of the pandemic society was rebuilt with new safety nets, an emerging consensus and embracing of digital solutions for public services.

The pandemic is followed by a swift and consensus-building recovery

Although 2020 and 2021 were poor years for both the economy and public health, the recovery that followed was swift, and by 2024 GDP had returned to pre-pandemic levels. Just as important as the headline economic figures, however, was the political and social consensus that followed the crisis. With the cultural divisions of Brexit behind the UK, the nation took the opportunity to design a new future.

At the heart of this was a collectivist approach to society and public services and renewed local engagement and community cohesion. Helping the vulnerable and isolated and addressing loneliness remain significant challenges in 2030 – especially for some groups of people – but levels of loneliness are lower than a decade ago and have been falling for years.

A new social safety net

One of the most striking features of the post-pandemic consensus was the adaptation of the furlough scheme into a more universal benefit, or universal basic income. Overall, this has led to a reduction in both levels of non-retirement welfare spending and poverty.

This new social safety net has helped rebuild local communities. It has also reinvigorated volunteering and the charitable sector. Most strikingly, a more favourable economic and social climate has helped reconcile divisions between the generations. Better public finances also mean that public service funding challenges are not as acute.

Local communities transformed

Towns and cities across the UK were transformed in the wake of the pandemic. With more people spending more time in their local areas – combined with the burgeoning sense of community spirit and togetherness – town centres were recast as leisure and community hubs.

Experience based leisure – encompassing traditional pubs and cafes to e-sports venues and sports centres – now dominates commercial properties in town centres, imbued with a strong sense of local identity. Local 'doing good' is a key component of successful towns, helping both wellbeing and the charitable sector.

Loneliness hotspots remain

Transformations in work have not been universally positive, and rapidly expanded gig economy and precarious work remain major hotspots for vulnerable and isolated people.

In addition, although many home workers took advantage of extra time at home and in their local communities, many still missed the interaction and sociability of the office. Younger generations are particularly affected by this – having had a heavily disrupted period of education through the pandemic and then graduated into a post-office world.



Benefits of technology are shared

Continued developments in technology are seen as critical to helping the vulnerable and isolated and addressing loneliness hotspots in the years ahead. The last decade has seen already remarkable and beneficial progress, particularly in services dependent on the UK's new 5G network.

Health and social care in particular have been transformed by AI and IoT technology, helping to significantly reduce loneliness and isolation as well as improve physical health. Smart home tech can monitor and relay a patient's condition, targeting need and allowing carers to maximise one-to-one time with patients.

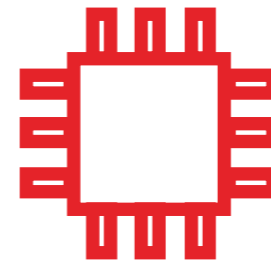
The same tools are helping to enrich digital interactions when meeting face to face isn't possible. More immersive tech has enabled those that are isolated to have meaningful interactions – over dinner, playing games, watching TV together – than the rudimentary video calling technology of a decade ago. In many cases, this tech is helping contribute to greater mental wellbeing, as it has never been easier to connect.

“
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How do we shape the future?

The future is far from set in stone. Whether it's government, businesses, charities or technology providers like Vodafone, there are actions that organisations can take to create a happier, more connected society.



Vodafone and other technology providers

Technology providers like Vodafone can play a key role in tackling loneliness. Part of the answer lies in partnership with government and other organisations: working together to keep loneliness on the agenda and ensure that every opportunity is taken to help the vulnerable and isolated.

Technology itself is also vital to tackling the digital divide; by delivering connectivity and supporting the development of digital skills, we can help vulnerable and isolated people to stay connected to others.

- Consider helping the vulnerable and isolated and addressing loneliness in all partnerships and projects
- Develop propositions that will combat loneliness and promote social, active lifestyle E.g. wearables
- Play a part in keeping loneliness on the agenda, by maintaining dialogue with government, other businesses and trade groups
- Encourage employees to get involved in activities that address loneliness, with programmes to deliver change in local communities
- Help customers to access digital services and gain the skills and confidence to stay connected
- Develop services to identify customer loneliness early and connect them with support
- Work with government to ensure that everyone is connected – including donating connectivity if necessary. For example, build on [Vodafone's work with Age UK](#) to deliver tablet computers and connectivity to lonely and vulnerable people
- Mitigate the challenges of online behaviours, by encouraging responsible use of technology and monitor the challenges that come with technology use
- Consider the accessibility and suitability of all products and services and the potential impact on people who are higher risk of being isolated and lonely.



Action at Vodafone

At Vodafone, we're committed to playing our part to help lonely and vulnerable people throughout the UK. We have rolled out programmes to increase digital inclusion, help both our customers and non-customers to stay connected and support our employees during this difficult period. There's much more still to do, but our work so far includes:

- The Great British Tech Appeal, a partnership with Barnardo's, SafeLives and British Red Cross to provide devices and connectivity for over 2,000 digitally excluded people, so that they can connect with others online and access crucial services
- A free technology support service, offering a 30-minute technology tutorial to anyone – whether or not they are a current customer – to help them to gain the digital skills and confidence to stay in touch with others
- HR initiatives to support our employees, including regular surveys to check on wellbeing, office equipment and an online resource hub for working remotely and care packages delivered to all UK staff as thanks for their commitment
- [TechConnect](#), a series of masterclasses for older people with advice from setting up phones to using social media



Government & Public Sector

Together with the wider public sector, the government can help to ensure that tackling loneliness and isolation remains high on the national agenda.

Targeted policies can help to address the trends that are driving loneliness and isolation, particularly post-pandemic. Meanwhile, with a focus on connectivity and digital skills, technology can help to deliver healthcare and support more effectively, as well as connecting the most isolated.

- Keep addressing loneliness on the agenda, by retaining a Minister for Loneliness throughout the decade
- Accelerate digitalised care and the connected home, by integrating IoT, 5G, smart home tech and AI into health and care delivery wherever possible
- Expand social and digital prescribing across the health system, as well as raising public awareness of their advantages
- Expand digital training with a nationwide digital education programme for avoiding online harms and maximising online opportunities;
- Identify key at risk groups – gig economy workers, those with long term chronic conditions, those in single person households – and develop strategies to mitigate impact
- Further extend parental leave to give new parents more time and more flexibility around working in the first year
- Invest in new types of community space to replace high streets and revitalise town centres for a post-retail future with connectivity at its core
- Help to connect the nation, by working with industry to ensure truly universal broadband and mobile coverage
- True Collaboration between industry, third sector and government to allow impactful programmes that are co-designed



Businesses & Employers

Businesses are central to the lives of their employees and the communities where they work. Measures to support workers – especially during the Covid-19 pandemic – can make a significant difference to wellbeing, while working with local charities can help to address loneliness in the community.

Importantly, by collaborating as a business community, we can share best practice and have a greater impact.

- Support employees during the lockdown, with working practices to help bring remote teams together and communicating with employees regularly
- Adapt to the new normal in the longer term by offering flexible working routines to ensure employees retain social contact
- Redesign and digitise internal processes to deliver the best support for employees under the new circumstances; for example, [Future Ready Vodafone](#) aims to create a new employee experience
- Consider and take action against issues that can contribute to isolation, such as domestic abuse; for example, join the [Employers' Initiative on Domestic Abuse](#) and institute safe leave policies
- Support local communities and social enterprises, especially those that support socially prescribed activities
- Invest in digital education for staff – helping them upskill at work and develop skills – and identify risk of loneliness among employees
- Consider partnerships and working together with other organisations, to share best practice and have a wider impact



Charity / Third Sector

Charities have always been central to supporting the most vulnerable, but during Covid-19 there has been greater demand on services than perhaps ever before. The public has become even more aware of the efforts of the third sector to tackle issues like loneliness, and there is the opportunity to build on this interest in the months ahead.

By creating volunteering models that reflect changes in people's working habits – and increasing awareness and visibility of the crucial services being provided – charities can create a positive legacy from a challenging time.

- Design and trial new volunteering models that allow people to donate time in new ways – which might be flexible, digital and informal, like gig economy models
- Focus on working with communities, drawing on hyper-local knowledge and activation to support vulnerable people
- Make volunteering more visible, using offline and online tools to increase public awareness of this vital work
- Consider collaborations with private sector organisations, drawing on their resources and skills to tackle loneliness in new ways
- Charity and corporate partnerships need to evolve from big donations to true partnerships where both parties bring their expertise to the programme for maximum impact to beneficiaries

Conclusion

Whatever your age, gender or circumstances, anyone can experience loneliness and social isolation – and the impact can be devastating.

And unfortunately, long-term trends may make this experience increasingly common. From more isolated ways of working, to the rise of smaller families, this report suggests that many of us could become more – not less – disconnected.

It's easy to feel disheartened about the decade ahead. But the three scenarios outlined for 2030 also emphasise the important role that our choices now have in helping to determine how lonely the UK becomes.

The actions of government, businesses, the third sector and individuals can reduce social isolation and improve the national quality of life.

Technology can play a central role, as long as we tackle the digital divide. By maximising digital inclusion, we can ensure everyone has the skills and tools to stay connected to friends, family and society. At Vodafone, we're committed to playing our part in keeping loneliness on the agenda and providing connectivity.

Covid-19 has reminded many of us of the value of being connected to what really matters.

Now, we have the opportunity to translate these experiences into concrete actions. By tackling loneliness and supporting vulnerable and isolated people now, we can choose a happier, more connected future.

Methodology

Vodafone commissioned **Trajectory**, a specialist futures consultancy, to research the drivers of loneliness and social isolation and to explore what the future scale and impact will be in 2030.

Trajectory have developed three distinct scenarios for this future, through a rigorous programme of trends analysis, horizon scanning, expert interviews and scenario planning.

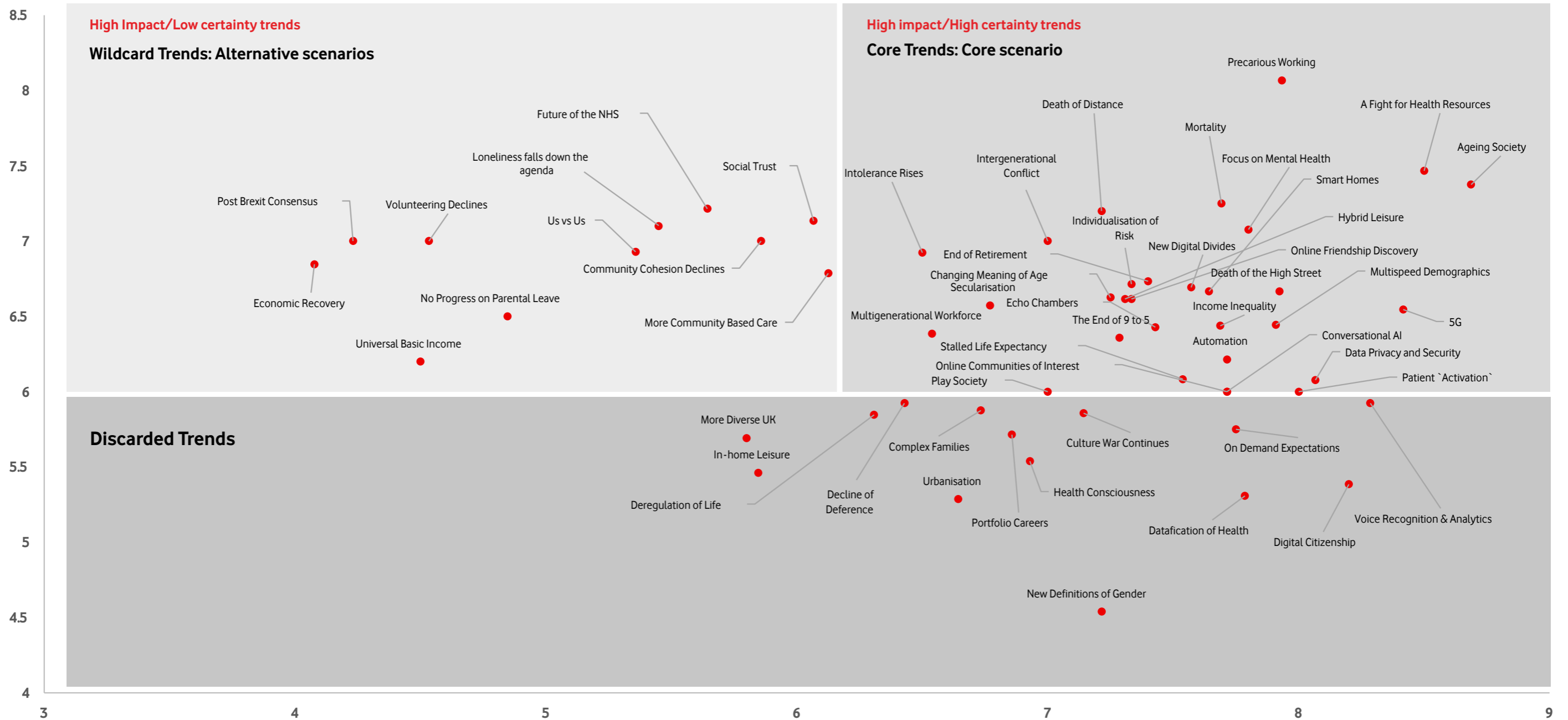
- 1. Horizon scanning:** Conducted trends analysis to identify trends that may drive loneliness over the next decade
- 2. Expert consultation:** Twenty experts, from a range of backgrounds and disciplines, examined the trends and rated them for their likelihood to happen and the impact on loneliness and social isolation if so
- 3. Scenario creation:** Three distinct scenarios were created from the rated trends, including a probable 'core' scenario and two alternative 'wildcard' scenarios.

Expert panel

Our special thanks to the experts who participated:

Tim Drake, Author of *Generation Cherry & Do Agile*; **Karen Dolva**, Founder at No Isolation; **Clare Gray**, Disability Advocacy Adviser at Shaw Trust; **Kate Melvin**, Consultant Social Researcher; **Dr Anna Topakas**, Lecturer in Work Psychology, Institute of Work Psychology at The University of Sheffield; **Christine Hemphill**, Managing Director at Open Inclusion; **Richard Lim**, Chief Executive at Retail Economics; **Darroch Bagshaw**, Managing Director at Hospitality Data Insights; **Sufina Ahmad**, Director at John Ellerman Foundation; **Dr Pearl Dykstra**, Professor of Empirical Sociology at Erasmus University Rotterdam; **Lena Dahlberg**, Associate Professor, Social Work at Dalarna University and Karolinska Institutet; **Kyro Brooks**, Founder at Mobilise Care; **Jonathan Gershuny**, Professor of Economic Sociology, ESRC Centre for Time Use Research Institute for Social Research at UCL; **Christina Watson**, Head of Business Development at UK Youth; **Catherine McClen**, Founder & CEO at BuddyHub C.I.C.; **Jane O'Brien**, Director of Evidence and Evaluation at Youth Endowment Fund; **Marcus Hulme**, Social Value Director at Places for People; **Annie Dell**, Policy Advisor at Salvation Army; **Helen Lamprell**, General Counsel and External Affairs Director at Vodafone UK; **Andrea Dona**, Head of Networks at Vodafone

Mapping the trends: high impact, high certainty



Wildcard Trends: Alternative scenarios

- Volunteering declines
- Us vs Us
- Future of the NHS
- Social Trust
- Community cohesion declines
- More community based care
- No progress on parental leave
- Universal basic income
- Economic recovery
- Post-Brexit consensus
- Loneliness falls down agenda

Core Trends: Core scenario

- Intolerance rises
- Intergenerational conflict
- End of retirement
- Changing meaning of age
- Multigenerational workforce
- Secularisation
- Echo chambers
- Stalled life expectancy
- Online communities of interest
- Play society
- End of 9 to 5
- Individualisation of risk
- New digital divides
- Automation
- Income inequality
- Death of the High Street
- Mortality
- Precarious working
- Fight for resources
- Ageing society
- Smart homes
- Hybrid leisure
- Online friendship discovery
- Multispeed demographics
- 5G
- Conversational AI
- Data privacy
- Patient activation
- Death of distance



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