



UK 2025 VITALITY INDEX

A DEFINITIVE HEALTH CHECK
ON THE UK'S TOWNS AND CITIES

Lambert
Smith
Hampton

**23 DATASETS 100
LOCATIONS LIFE
SATISFACTION
RETAIL SPEND
EMPLOYMENT GROWTH
RECYCLING RATES
SOCIODEMOGRAPHICS
GREEN SPACE PROPERTY
INVESTMENT CRIME
RATES EDUCATIONAL
ATTAINMENT HOUSING
DELIVERY WAGES**

Welcome to the 2025 UK Vitality Index, LSH's twelfth annual assessment measuring the health of the UK's largest towns and cities outside London.

Divided into three distinct pillars, the main index utilises 18 datasets to identify the best places to live and work in the UK. By incorporating a range of indicators spanning Economy & Business, Living and Health & Environment, the report takes a holistic approach in assessing the vitality of the UK's 100 largest towns and cities by population outside of London.

Following the economic challenges of previous years, 2024 brought clear signs of improving economic conditions across the UK's urban centres, aided by easing inflation and two interest rate cuts. Notwithstanding fresh political and economic uncertainty relating to the Autumn Budget and the US election result, conditions are expected to remain relatively stable as we move through 2025.

Many urban centres witnessed improvements across a host of indicators over the last year. This report shines a light on the best performing locations, providing insight into their resilience, adaptability and potential for growth in an ever-changing world.

HEADLINES

2025 TOP TEN

1 WINDSOR & MAIDENHEAD

2 MILTON KEYNES

3 WATFORD

4 WOKING

5 HIGH WYCOMBE

6 OXFORD

7 READING

8 BRIGHTON & HOVE

9 SOLIHULL

10 SALE

WINDSOR & MAIDENHEAD
RETURNS TO THE TOP

MILTON KEYNES IN TOP
FIVE FOR FIRST TIME

THE SOUTH DOMINATES
THE RANKING

BRIGHTON & HOVE
RETURNS TO THE TOP 10

SALE TOP FOR LIVING

WOKING BEST
FOR HEALTH &
ENVIRONMENT



KEY FINDINGS

WINDSOR & MAIDENHEAD BACK ON TOP

Having previously topped the rankings in 2022, Windsor & Maidenhead is once again crowned as the UK's top-ranked location in the 2025 Vitality Index. The Berkshire borough climbed from fifth position last year to knock last year's winner Watford off top spot.

Having consistently featured in the Top 10 over the past five years, Windsor & Maidenhead's victorious position was driven by its top ranking for Economy and Business, boasting top scores in six of the pillar's seven metrics. It also performed very well in other areas, securing second and ninth position in the Health & Environment and Living pillars respectively.

MILTON KEYNES HITS THE MK

Milton Keynes takes second place in this year's Index, its strongest ever showing and first appearance in the overall top five. The fast-growing city climbed six positions on last year, drawing much of its strength from placing second for Economy & Business, having achieved top scores in four of the pillar's seven metrics.

Meanwhile, Watford dropped to third place in this year's Vitality Index, having topped the Index for the first time in 2024. Nevertheless, the Hertfordshire town continued to perform strongly on both the Living and Economy & Business pillars, achieving top scores for GCSE attainment and wage growth.

LEANING ON LONDON

The South of England continues to dominate the Top 10, with eight of this year's top ten-ranked locations situated within the UK's southernmost regions. The top five are all located in close proximity to London, with their success reflecting both the importance of London's economic influence, as well as other benefits offered by many of its satellite towns, such as high quality of life and access to green space.

These locations include Woking, which has remained in the overall Top 10 for six consecutive years. The Surrey town took the top spot on the Health & Environment pillar, achieving the highest possible score in both life satisfaction and recycling rates. While High Wycombe slipped from third place last year to fifth, it consistently ranks highly in the Health & Environment pillar, achieving top scores this year for its low crime rate and low cardiovascular mortality rate.

BRIGHTON BOUNCES BACK

Brighton & Hove is 2025's biggest mover, rebounding ten places from last year to eighth position. This marks the Sussex city's return to the Top 10 after a three-year absence, a result primarily attributed to its high rank on the Economy & Business pillar, specifically in job growth and investment into commercial property. Meanwhile, following a two-year hiatus, both Oxford and Reading returned to the Top 10 this year, taking sixth and seventh place respectively.

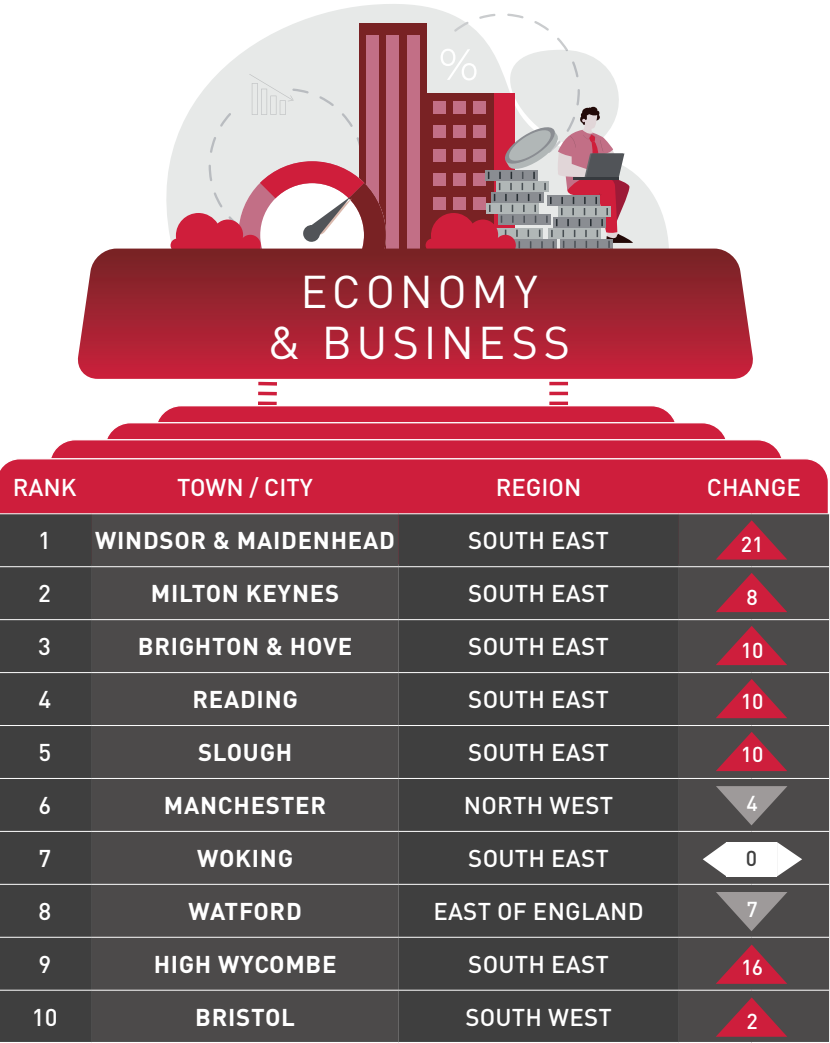
Repeating last year's pattern, only two locations outside of Southern England featured in the Top 10. Having been in the Top 10 once before, the West Midlands town of Solihull took ninth place this year, reflecting a strong performance in the Living pillar and achieving a top score for comparison goods retail spend. The sole representation in the Top 10 from the North is the Greater Manchester town of Sale, which climbed seven places to tenth thanks to its top-ranking in the Living pillar.

BIG CLIMBERS IN THE SOUTH WEST

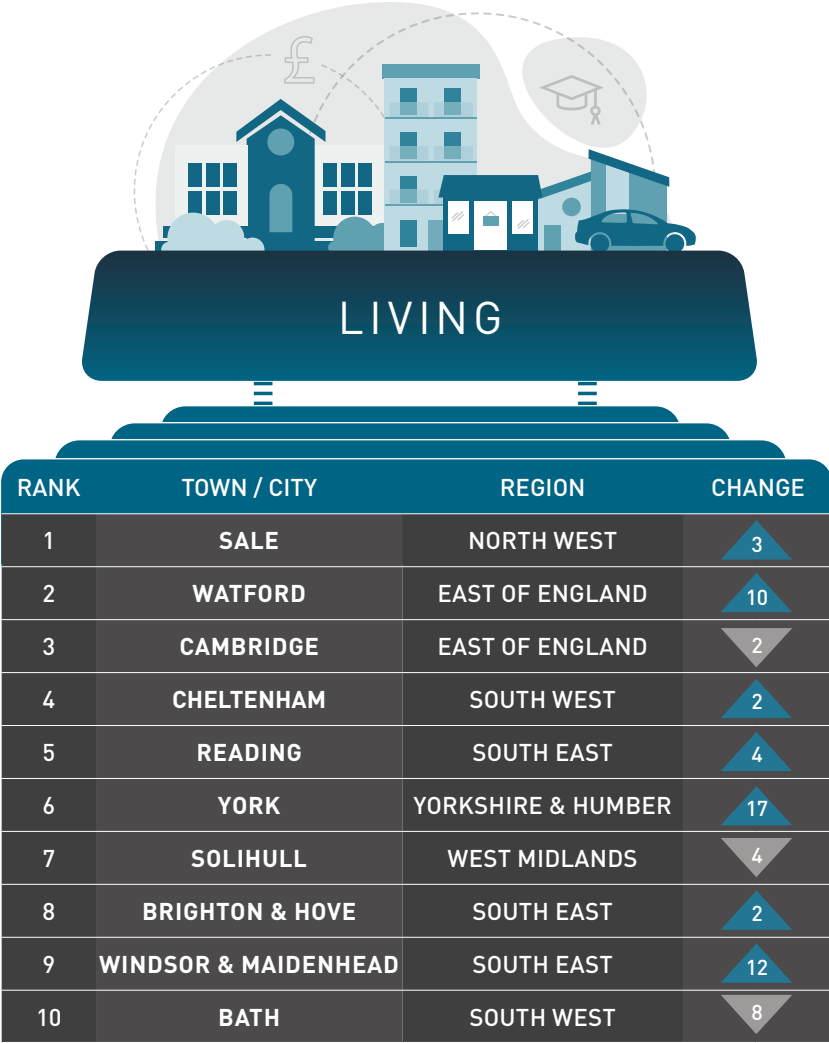
This year's Top 10 continues to lack representation from a number of regions, specifically the South West, East Midlands, Yorkshire and the Humber, North East, Wales, Scotland, and Northern Ireland. However, several locations in the South West saw notable improvements in their respective rankings since last year. Most notably, Exeter climbed 16 places to 17th thanks to improved scores in the Living pillar, while Bristol rose 15 places to 19th.

However, of all the locations outside of Southern England, York saw the most significant increase in the upper echelons from last year. The cathedral city climbed ten places from last year to 16th overall, benefitting from a sixth placed ranking in the Living pillar. While this reflected improvements across many of the metrics, York stands out for its high score in NVQ level 4+ attainment.

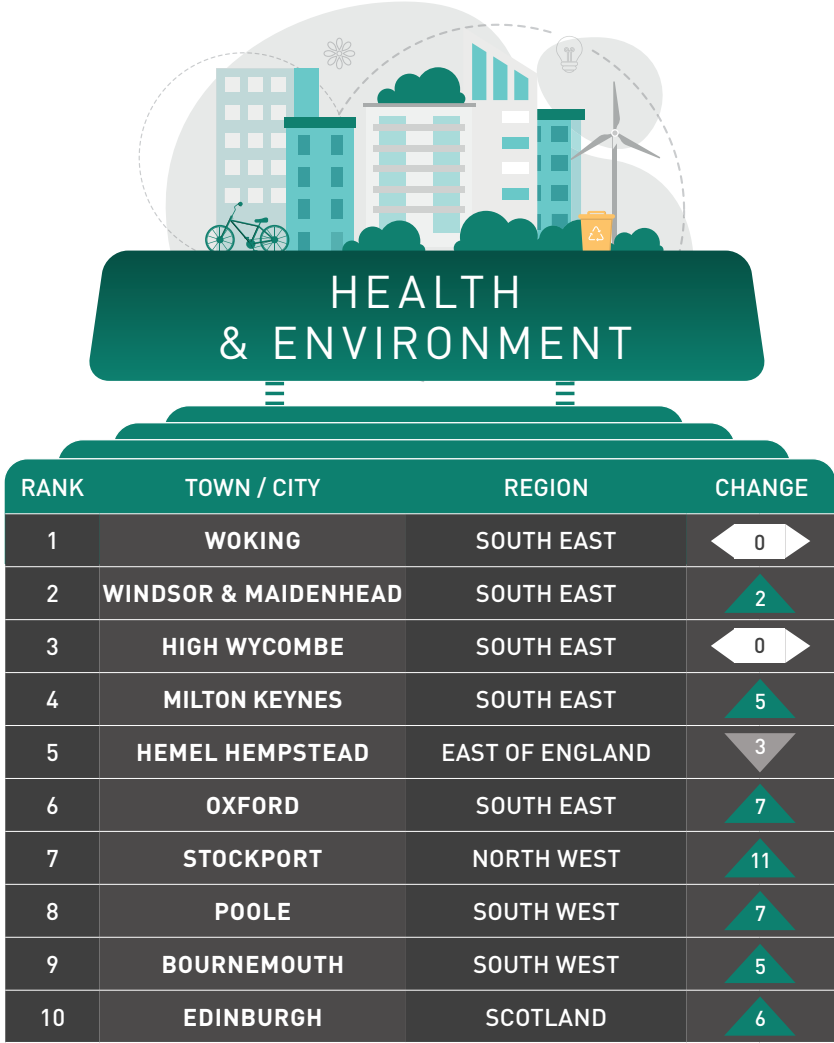
THE THREE PILLARS



Economic and Business vitality is measured by wage growth, workforce jobs growth in specific sectors, new enterprises and business density, GVA per capita, GVA growth and forecast and commercial property investment volume per capita.



The Living pillar encompasses an analysis of education, lifestyle and consumption. It incorporates house price growth, GCSE results, NVQ4+ attainment, households in specific MOSAIC categories, comparison goods retail spend and retail vacancy rate.



The Health and Environment pillar comprises cardiovascular mortality rate, life satisfaction, recycling rates, energy consumption per capita, CO2 emissions per capita, green space per capita and recorded crimes per capita.

DIGGING DEEPER

ECONOMY & BUSINESS

The South East dominated on this pillar, making up seven of the Top 10 locations. Windsor and Maidenhead was top, climbing 21 positions from last year with top scores for wages and job growth, while Milton Keynes owed its second-placed position to GVA growth and investment into commercial property. Brighton & Hove, Reading and Slough all climbed 10 positions reflecting strong job growth, taking third, fourth and fifth respectively.

Manchester takes sixth and is the only northern region represented in the Top 10. The North Western city has featured in the Top 10 for four consecutive years, demonstrating a consistently strong economic profile. Overall, Manchester continues to perform strongly across all indicators, with top scores for business growth and investment into commercial property.

For three consecutive years, both Woking and Watford have made a Top 10 appearance in the Economy and Business pillar. Woking remained in seventh, reflecting strong scores across the board and a top score for investment into commercial property. Meanwhile, Watford dropped seven places to eighth due to a weaker score in job growth, but remained the only representative from the East of England to feature in the Top 10.

High Wycombe climbs from 25th last year to ninth, marking its first appearance in the Top 10. The rise was spurred by improving job growth, with the Buckinghamshire town also top-scoring for business density and GVA growth. Completing the Top 10, Bristol stands as the only representative from the South West, achieving the maximum score for investment into commercial property.

LIVING

The Top 10 locations in the Living pillar are the most geographically varied of the three pillars, with six UK regions represented. For the first time since the inception of the Vitality Index, Sale took top position on the Living pillar in 2025. The Greater Manchester town achieved top scores for house price growth and GCSE attainment.

Watford, last year's top-ranked location on the main index, climbed ten places to second on the Living pillar with strong scores across all metrics. Having topped the Living pillar last year, Cambridge fell two places to third. This was largely down to a relatively weak score for house price growth, with a continuing strong performance on the other Living metrics.

Having stood in sixth place over the past two years, Cheltenham climbed two places to fourth, achieving the highest possible score for comparison goods retail spend. The South East continued to feature prominently on the Living pillar, occupying three positions in this year's Top 10. Reading rose to fifth, Brighton & Hove took eighth and Windsor & Maidenhead rose 12 places to ninth.

York and Solihull, positioned sixth and seventh respectively, are the only other locations to feature in the Top 10 outside of the South. York climbed 17 places since last year, driven by an improved score for house price growth. Meanwhile, Solihull continued to perform strongly across all indicators. Having remained in the Top 10 since the inception of the Vitality Index, Bath dropped eight places to tenth, achieving strong scores for NVQ level 4+ and its retail vacancy rate, but fell back on house price growth.

HEALTH & ENVIRONMENT

Reflecting entrenched spatial inequalities, the southern regions of England account for eight of the Top 10 locations on the Health and Environment pillar. Broadly speaking, locations in the South East tend to score highly for levels of green space and low cardiovascular mortality rates; while those in the South West generally have lower levels of CO2 emissions and higher recycling rates.

Woking took the top spot on this pillar for a fourth consecutive year, boasting strong scores across all of the pillar's seven metrics. The Surrey town had the highest life satisfaction score of all 100 locations and achieved a top score for its recycling rate. The South East continued its strong showing on this pillar taking the next three spots. Windsor & Maidenhead (2nd), High Wycombe (3rd) and Milton Keynes (4th) all scored highly for health and wellbeing indicators, most notably low rates of cardiovascular mortality.

Hemel Hempstead takes fifth this year and is the only representative from the East region, achieving strong scores for comparison goods retail spend and a low retail vacancy rate. Meanwhile, Oxford climbed seven positions to sixth, achieving the highest possible score for life satisfaction.

After a three-year absence, Stockport returned to this year's Top 10, climbing 11 positions to take seventh. The Greater Manchester town achieved high scores on recycling rates and levels of green space. Elsewhere, Edinburgh made its debut Top 10 appearance on this pillar this year, and is the only Scottish location to make the Top 10 on any of the three pillars, driven by a top score for green space and a high score for life satisfaction.

HOW WE DID IT

This report utilises 18 datasets relating to the many different aspects of a town or city’s vitality. 100 UK towns and cities are ranked according to each of the datasets.

This combination of demographics, educational attainment, business activity, economic output, affluence, sustainability and commercial property data provides a rounded view of each location’s vitality.

To focus on particular aspects of these localities, we split the datasets into three thematic sub-indices, or ‘pillars’. These sub-indices illustrate which locations are performing best in economy and business, are best places for living and which are the healthiest and greenest.

To create a score for each dataset, it is ranked and each location is given a decile ranked score from 1-10; the top 10% receiving a score of 10 and the bottom 10% a score of one. The decile rankings are summed across each pillar’s datasets to create a pillar score for each location.

The overall Vitality Index score is a summation of each location’s total score on the three pillars. This score is ranked from 1-100, to give locations their final position.

PILLAR/INDEX	DATASET	SOURCE
ECONOMY & BUSINESS	Wage growth	ONS, NISRA
	Workforce jobs growth	Experian
	New enterprises & business density	ONS
	GVA per capita & growth/forecast	Experian
	Commercial property investment	Lambert Smith Hampton
LIVING	House price growth	Land Registry, Registers of Scotland
	GCSE results	Department for Education, StatsWales, Scottish Government
	NVQ4+ qualification	ONS, NISRA
	Household classification	Experian
	Comparison goods retail spend	Experian
	Retail vacancy rates	Experian, Springboard
HEALTH & ENVIRONMENT	Cardiovascular mortality	British Heart Foundation
	Life satisfaction	ONS
	Household waste recycled	DEFRA, StatsWales, SEPA, DAERA
	Energy consumption	DBEIS
	Carbon dioxide emissions	DBEIS
	Crime rate	ONS, Scottish Government, PSNI
	Green space per capita	ONS



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