Movers Index

How people are moving around the UK
and what that means for business

2024 Q1 Edition

Contents

Foreword

Fresh insights reveal early trends for 2024

As we step into the second quarter of the year, we're excited to share the new and lasting trends that are emerging.

Our Movers Index reports, released quarterly, provide a comprehensive view of the latest UK movement trends. Created from connections to O_2 mobile masts, the anonymised and aggregated data is analysed by our dedicated team of data scientists and engineers to generate insights on commuting, retail, and transport trends across the nation.

In this edition, we plunge into insights from O_2 Motion data, combined with polling findings from 2,000 businesses and 2,000 consumers. Together, these sources highlight the commuting patterns, retail adaptations, and evolving movement habits shaping the start of this year. One year on from our inaugural report, we've also compared Q1 2024 to Q1 2023, providing retrospective insights while offering a glimpse into new trends.

From retailers to healthcare providers, reliable data can equip businesses across every sector with the tools to make informed decisions. True to our ethos, the Virgin Media O_2 Business Movers Index remains readily accessible to everyone, whether you're one of our business partners or simply a curious individual.

Dive into our latest report to unearth the trends that are shaping 2024.

Diego Tedesco
Director of Commercial,
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Commuting

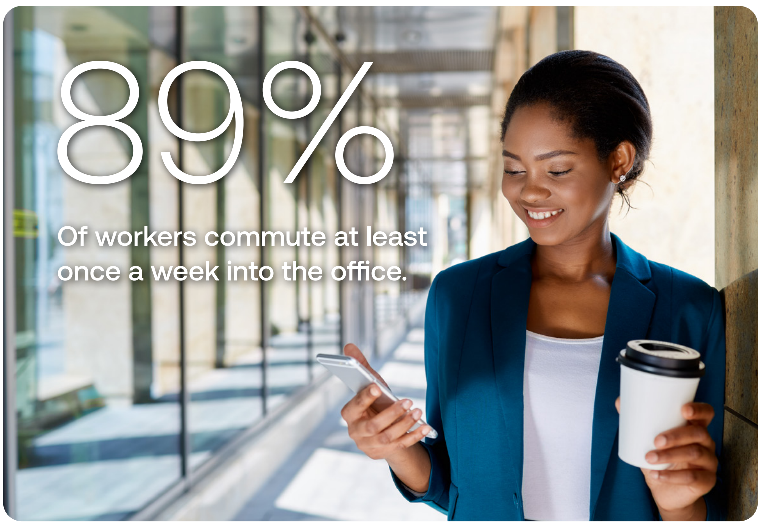
The post-pandemic office return continues, with 89% commuting at least once a week and 38% daily.

Businesses are actively encouraging workers to return to the office, with 83% enforcing mandatory in-office policies to rebuild office culture and foster collaboration.

The desire to return to the office isn't only led by business leaders. Workers of all ages are increasing their trips to the workplace significantly compared to last year, as people 65+ (42%) and 55-64 year-olds (36%) demonstrate the biggest increase in trips. Nearly half (48%) of employees prefer office work for better connections (36%) and productivity (35%). For the 29% who prefer working from home, 52% attributed this to a desire to avoid commute times and costs.

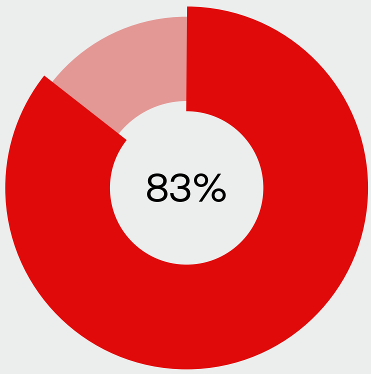
Weekday commutes for the start of year between 7am to 8am peak on trips into Birkenhead (30%), Reading (28%), Wolverhampton (28%) and Southampton (28%). Meanwhile, Manchester (12%), Glasgow (12%) and London (12%) peak for commutes starting between 9am to 10am.

Despite the return to office trend, three quarters (75%) of businesses believe in a hybrid future of work. With businesses prioritising perks like flexible commuting hours and free parking to support employees, with 47% of commuters opting for off-peak travel to mitigate stress and costs.

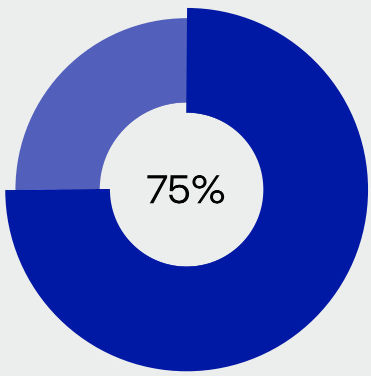


48%

Nearly half of employees prefer office work for better connections



Of businesses are enforcing mandatory in-office polices.



Despite this trend, most businesses believe in a hybrid future for work.

Q1

What day(s) of the week are people commuting to work?

	Q1 2023	Q1 2024
Monday	71 %	67%
Tuesday	71 %	68%
Wednesday	78 %	71%
Thursday	71 %	68%
Friday	62 %	57%
Saturday	16 %	19%
Sunday	14 %	12%

Retail

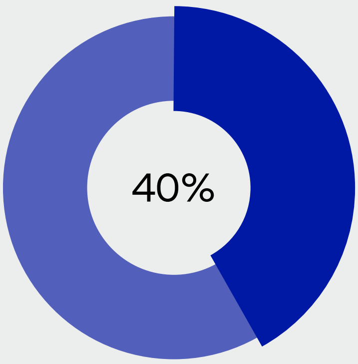
The start of the year was marked by a shift in consumer behaviour.

With 40% of Brits prioritising online shopping, enticed by the allure of 24/7 accessibility and the convenience of avoiding crowded stores. This is a marked increase from the first quarter of 2023 when 26% reported prioritising online shopping more vs 27% who prioritised it less.

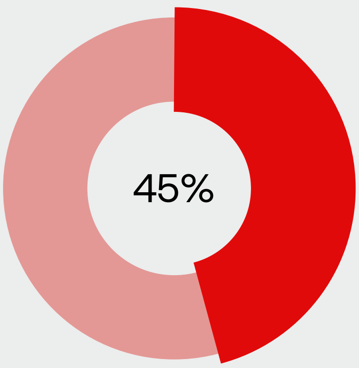
The popularity of online shopping, particularly in colder months, is evident from mobile movement data, as shopping centre trips experienced a fall in growth (-6%) the first few months of the year. January is the month that experienced the biggest fall, coming off the back of the holiday season. Despite this digital surge, local high streets continue to hold significance, with 57% affirming their importance and showing a willingness to pay a premium to support community businesses.

Additionally, as cost-of-living pressures persist in 2024, 45% of consumers have adopted a more budget-conscious approach. A year ago, 49% reported being more budget conscious than they had been over the previous three months. Looking ahead, Brits are planning to allocate more of their budgets towards holidays and self-care, signalling evolving priorities in lifestyle spending.

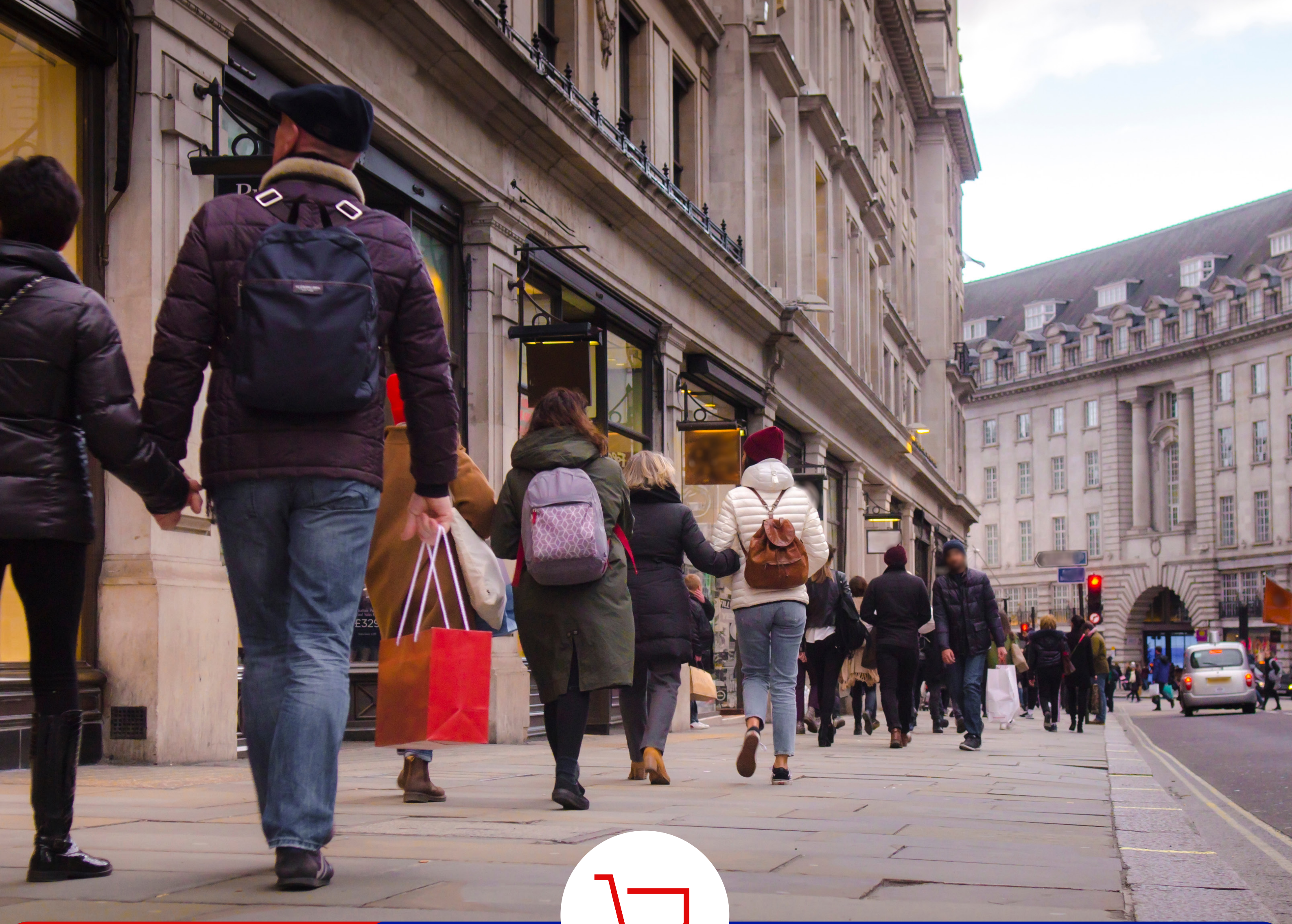
The influence of social media on consumer decisions remains profound. Notably, 26% – rising to 45% of 18–24-year-olds – have made purchases based on recommendations found on these social platforms. Meanwhile, 69% of businesses are leveraging social media trends to attract more customers.



Of Brits prioritise the convenience of online shopping.



Of consumers have adopted a more budget-conscious approach.



Q1

How have people changed their shopping habits in the past three months?

	2023	2024
I shop at different times of day (e.g. earlier or later than usual)	20%	17%
I shop on different days of the week than usual	18%	20%
I shop at different stores or online retailers than usual	17%	17%
I purchase different types of products than usual	18%	18%
I am more budget-conscious when shopping	49%	45%
I am less budget-conscious when shopping	5%	6%
I use delivery services (e.g. Amazon Prime, Deliveroo) more often than before	10%	17%
I use delivery services (e.g. Amazon Prime, Deliveroo) less often than before	8%	13%

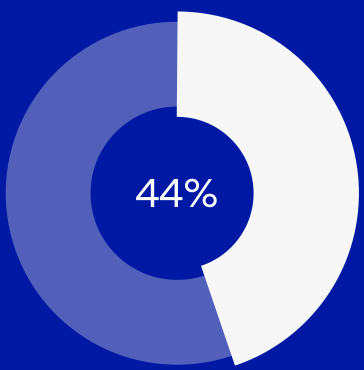
Transport

Transport habits are currently shifting, with four in five (80%) Brits now incorporating public transport into their travel routines compared to 66% this time last year.

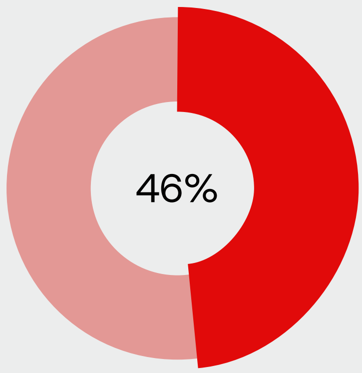
Wales is leading the increase in rail trips, with two of the top three towns to travel to by train. Cities with the biggest growth in rail trips compared with last year are Newport (104%), Bradford (70%), Cardiff (67%) and Edinburgh (47%). Meanwhile, the places that experienced the least growth in rail trips were Coventry (-11%), Luton (-7%) and London (-5%).

This surge is largely driven by cost, as revealed by 44% of individuals who have recently increased their use of public transport. Additionally, environmental concerns are emerging as a notable factor, influencing transport decisions for 46% of Brits.

Colder months seem to inspire fewer rail trips, as mobile data shows that all towns experienced a decrease in trips for January followed by a rise during the months of February and March 2024. The fluctation could also be caused by bank holidays and school breaks changing the way people choose to travel.



Of commuters have recently increased their use of public transport



of commuters say environmental concerns are a notable factor influencing their transport decisions

Methodology

O_2 Motion provides aggregated, anonymised data on origin-destination insights into population movement around the UK by trip mode, purpose, time of day, age and gender by week. The data captured by O_2 represents 35% of the UK's population. Through the use of advanced methodologies, O_2 is able to expand that figure to represent the whole of the UK's population movement. This analysis has layered the journey start time, mode and journey purpose onto geographic boundaries and land use data to generate transport, commuting, and retail focused insights. O_2 Motion data does not capture international visitors in the UK or children.

Strand Partners' specialist research team conducted an online survey of 2,000 nationally representative members of the public (by age, gender and NUT1 region) online between 22.12.23 and 27.12.2. All data was then weighted against the latest ONS census. For businesses, 2,000 UK business leaders were surveyed who confirmed that they were currently in senior leadership roles (e.g. CEO, C-suite, director-level) of UK businesses. All data gathered is of a publishable quality and is produced within Market Research Society guidelines. For full data tables and more detail of the methodology, please e-mail: polling@strandpartners.com.

Business