Movers Index

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

Full-year 2024 Edition

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Foreword

Latest trends in retail and travel

As we kick off a new year, we're excited to share the latest insights into retail, commuting, and travel trends from 2024. Our quarterly Movers Index provides a comprehensive analysis of evolving movement trends, based on anonymised and aggregated data from the O2 mobile network.

This data, which is examined by my team of data scientists and engineers, shows a detailed view of how people are shopping, commuting, and traveling across the nation.

O2 Motion data, supplemented by polling from 2,000 businesses and 2,000 consumers, provides valuable insight on the shifts in shopping habits, commuting trends, and key events that shaped the year. By understanding the stats and figures behind these behaviours, businesses of all sizes can be empowered to make strategic decisions for 2025.

Whether you're a retailer looking to maximise footfall in shops or a small business seeking to understand consumer trends, reliable data provides an opportunity to make informed choices – allowing you to take a running leap into the new year.

The Virgin Media O2 Business Movers Index is a free resource, available to anyone interested in the trends shaping the UK.

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Commuting

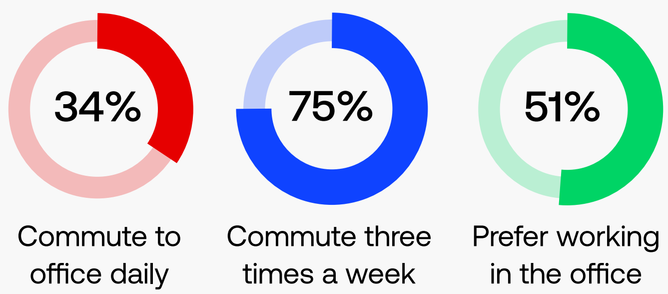
2024 saw a notable increase in businesses requiring employees to work in the office, with particularly significant rises in three-day office working mandates.

However, mobile data indicates a mixed effect on commuting volumes across the country. At a national level, the number of morning commuting trips into major towns were 7% lower in 2024 than 2023. The biggest year-on-year fall in commute numbers was in August, suggesting people may be taking advantage of hybrid working to manage summer holiday childcare.

The changing commuting patterns are having a mixed impact for rail operators, with weekday morning rail trips into major towns and cities rising and falling across the country compared to 2023. South Wales retained high growth in rail trips with increases of 30% to Cardiff, 23% to Newport and 22% to Swansea. Meanwhile, equivalent trips fell to Stoke-on-Trent by 21%, Coventry by 17% and Sunderland by 12%.

39% of workers commuted to the office five or more times per week in the past three months, though this figure drops to 32% for Gen Z workers (aged 18–24). 89% commute at least once a week. This comes as 35% of office-based companies now require employees to attend the office every day, while 88% require at least one day per week. 74% of office workers feel positive about mandatory office attendance policies, while only 10% oppose them.

Over the first few months of 2025, 34% of office workers plan to commute to the office daily, with 75% expecting to commute at least three times per week. Workers have increasingly pointed to the physical and mental wellbeing and cost-saving benefits of working in the office as key reasons for preferring not to work from home. Overall, 51% of office workers prefer working in the office, compared to 26% who favour working from home. Better connections with colleagues (39%) and productivity (36%) are key reasons for this preference. 56% of office workers report that free office heating has significantly motivated them to commute to the office in the past three months.



Office Commuting

39% Workers commuting 5 days a week

32% Gen Z workers commuting 5 days a week

89% Workers commuting 1 days a week

26% Prefer working in the office

39% Better colleague connections

36% More productivity

Has your company mandated that your employees must return to the office?

Key Insight: UK businesses have implemented stricter office-working mandates in 2024, with the proportion requiring employees to work in the office at least three days per week rising from 63% in Q1 to 75% in Q4, and the proportion requiring employees to work in the office at least four days per week rose from 43% to 50% across the same period

	Q4 2023	Q1 2024	Q4 2024
Yes - five days per week or more	30%		31%
Yes - four days per week	16%		19%
Yes - three days per week	21%		25%
Yes - two days per week	15%		9%
Yes - one day per week	4%		4%
No - but we are thinking about it	3%		3%
No - we are happy for employees to choose whether they work in the office or remotely	10%		8%
No - our team is entirely remote	1%		2%
Total some mandate	86%		88%
Total mandate three days or more	67%		75%
Total mandate four days or more	46%		50%

On what day(s) of the week do you typically commute to work? Please select each day you commute?

Key Insight: Wednesdays remained the most common days for office workers to commute to work, with 75% commuting on Wednesdays in Q4 2024

	Q4 2023	Q1 2024	Q4 2024
Monday	69%	67%	71%
Tuesday	70%	68%	69%
Wednesday	73%	71%	75%
Thursday	69%	68%	71%
Friday	61%	57%	62%
Saturday	19%	19%	18%
Sunday	11%	12%	10%

On average, how many minutes have you spent commuting per day in the past month?

Key Insight: The proportion of longer commutes rose across 2024, with 43% of office workers spending at least an hour a day commuting in Q4.

	Q4 2023	Q1 2024	Q4 2024
Less than 30 minutes	NA	30%	24%
30 - 59 minutes	NA	39%	31%
60 minutes +	NA	29%	43%

Retail

Rising costs continue to impact households

In-person shopping became more important across 2024 to a growing proportion of shoppers, alongside an increase in the value placed on second-hand shopping.

Key benefits of shopping in stores include seeing or trying products in person (55%), easier product comparisons (47%), and avoiding delivery fees (45%).

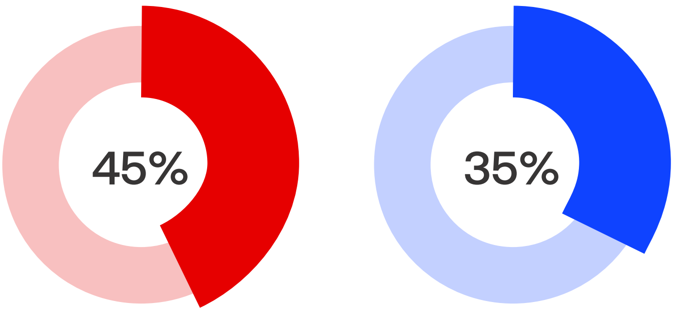
50% Gen Z (18-24 year olds), and 54% of those aged 25-34 shopped online more frequently in 2024 than they did in 2023, compared to 37% of Brits overall.

Looking across the year, weekend trips to high streets and shopping centres fell by 7% from 2023 to 2024. High street areas fared better experiencing a 5% fall in trips, while shopping centre areas saw a 9% fall in trip numbers. Trips to both types of retail areas fell between 2023 and 2024 in almost all months; only January and March saw an increase on the previous year.

Changes in shopping behaviours reflect tightening budgets. 35% of shoppers have purchased more discounted items, as 41% of Brits believe retail sales and discounts have become more frequent in 2024. 62% think standard pricing is often inflated to make discounts appear better. If forced to choose, 63% of Gen Z (18–24 year olds) would prioritise online shopping over in-store shopping, along with 62% of those aged 25-34. On the other hand, 68% of those aged 65+ would pick in-person shopping.

Transparent pricing before and after discounts is the most effective way for a retail store to increase consumer trust in their discount offers (40%).

45% of shoppers have reduced spending on non-essential items in the past three months; notably, this rises to 51% of those aged 55-64, to 50% of those aged 65 and up, and to 52% of those who identify as female. Overspending on non-essential items (34%) and impulse buying (33%) are the top shopping habits Brits aim to cut back on in 2025.



Cutting back on non-essentials

Purchasing more discounted items

Have you significantly changed shopping habits in any of the following ways in the past three months

Key Insight: Close to half of shoppers (46%) reported being more budget-conscious when shopping in Q4 2024, only s lightly down on Q4 2023 (49%) and slightly up from Q1 2024 (45%).

	Q4 2023	Q1 2024	Q4 2024
I am more budget-conscious when shopping	49%	45%	46%
I am less budget-conscious when shopping	4%	6%	7%
I use delivery services (e.g. Amazon Prime, Deliveroo) more often than before	15%	17%	17%
I use delivery services (e.g. Amazon Prime, Deliveroo) less often than before	10%	13%	15%
I shop second-hand more	18%	20%	19%

Percentage change in weekend daytime trips to high street and shopping centre retail areas between 2023 and 2024

Month	Shopping Centres	High Streets	High Streets and Shopping Centres
2024-01	0.9%	0.0%	0.3%
2024-02	0.4%	-2.2%	-1.2%
2024-03	1.8%	0.1%	0.8%
2024-04	-11.0%	-5.0%	-7.3%
2024-05	-10.4%	-5.2%	-7.2%
2024-06	-15.5%	-8.9%	-11.4%
2024-07	-15.0%	-6.9%	-10.0%
2024-08	-15.5%	-6.7%	-10.1%
2024-09	-13.4%	-9.2%	-10.8%
2024-10	-13.2%	-7.5%	-9.8%
2024-11	-14.1%	-6.4%	-9.5%
2024-12	-7.8%	-1.9%	-4.2%
Year Total	-9.5%	-5.0%	-6.8%

Holiday Trends

It's well known that Brits are well-travelled, and 2024 was marked by many international trips. Spain held its position as the most popular destination for Brits to visit every month of the year, with France in second place all year.

However, Brits are wise travellers and have shown a tendency to pick holidays according to when that destination has the best weather. Trips to Albania jump up in April and stay up until October. Despite ranking between 30 and 40 around the summer months, Albania drops below the top 50 countries that Brits are travelling to throughout the winter. A similar pattern has emerged for Bulgaria, which goes from ranking in the 30's up to the teens over the summer months.

While Greece, Portugal, and Italy are popular over the summer months, Australia, Austria and Finland emerge as prime winter travel spots. Experiencing summer weather during British winter months, Australia reaches a travel peak (ranking 25th) in December, with 10,363 people travelling from England to Australia in one week during December. However, the popularity wanes as Australian winter approaches, dropping to a rank of the 40s and 50s between April and August.

Destination popularity in Winter

Australia, Austria, Finland popularity increases in Winter

Albania and Bulgaria popularity decreases in Winter

Destination popularity in Summer

Greece, Portugal, and Italy popularity increases in Summer

Australia's popularity decreases in Summer

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 a nationally representative online survey of 2,010 people and 2,011 businesses between 24/12/2024 – 31/12/2024. The survey was representative by age, gender and NUTS 1 region. Strand Partners is a member of the British Polling Council and abides by its rules. 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