The Virgin Media O_2 Business Movers Index

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

Virgin media O_2 Business

Contents

Foreword

Our society increasingly places value and trust in data.

From informing the way a company decides to invest their money to how a person chooses to travel to work, quality information at the press of a button can be a powerful tool when used in the right way – for businesses and individuals alike. However, it's not always easy or straightforward to extract meaningful insights from data. This can be a lengthy process and it relies on the ability to compare and contrast findings. To expose accurate insights that enable you to see the full picture, you need expert support.

At Virgin Media O_2 Business, we have brilliant teams of engineers who advise and guide our business to ensure that we make the most of our data.

Our O_2 Motion team looks at anonymised and aggregated data on population movement captured by O_2 mobile and O_2 WiFi events. While we work with businesses every day to help them glean and derive meaning from datasets, this information can also reveal patterns and events that reflect trends across the UK.

If data is the new oil, everyone should be able to tap into the benefits.

This is why we're launching our first **Virgin Media O_2 Business Movers Index**, a publicly available quarterly report which dives into the latest UK movement insights from each quarter. With the aim of providing a top-level glimpse into trends revealed by our O_2 Motion data, the index will also incorporate findings from commissioned polling of 1,000 businesses and 2,000 consumers, painting a clear picture of UK movement patterns and the reasons behind them.

Each quarter, we aim to provide you with fresh insights on movement around towns and cities across the UK, working habits and more.

This first report covers commuting, retail and transport trends from the start of January to the end of March this year, alongside bonus insights on the King's Coronation.

The report has been purposefully crafted to be accessible and comprehensive to all, from data junkies to inquisitive minds. So you can browse through the top-level trends or explore further graphs and charts in the appendix, for those who want to immerse themselves in the statistics.

Jo Bertram, Managing Director,
Virgin Media O_2 Business

Commuting

Over three years on from the UK Government's 'stay at home' mandate, both employers and workers have reported a sharp increase in the number of us returning to the office.

In fact, two-fifths (40%) of workers say they're commuting more now than three months ago compared with a quarter (26%) who reported commuting less vs. pre-pandemic times.

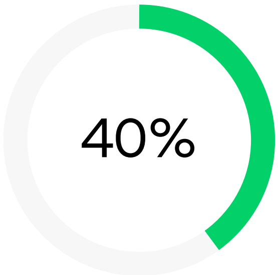
This return to the physical workplace is reflected in major towns and cities across the UK. Cardiff, Edinburgh and Glasgow have all seen increases in morning (6am to 11am) commutes with a respective increase of 12%.

Employees are embracing this shift with four-fifths (81%) of respondents confessing that they're happy to be traveling into work.

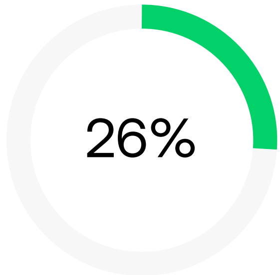
And the return to workplaces is good for companies, too. Nearly two-fifths (39%) of employees report experiencing increased productivity in the office compared to 7% who reported decreased productivity.

Despite the benefits to productivity, commuting is leading to further cost-of-living anxiety for 55% of surveyed individuals.

Cost has become an increasingly important factor in journey planning compared with three months ago, with some commuters sacrificing convenience (21% say it is less important) for a cheaper journey.

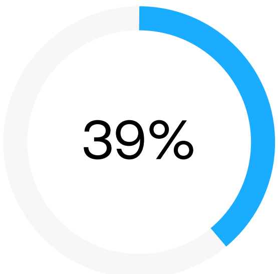


of workers say they're commuting more now than three months ago

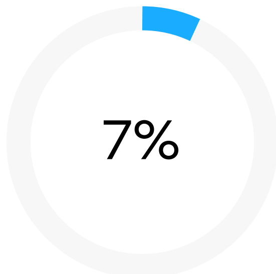


of workers say they're commuting less than pre-pandemic times

12%
increase in morning commutes (6am to 11am)



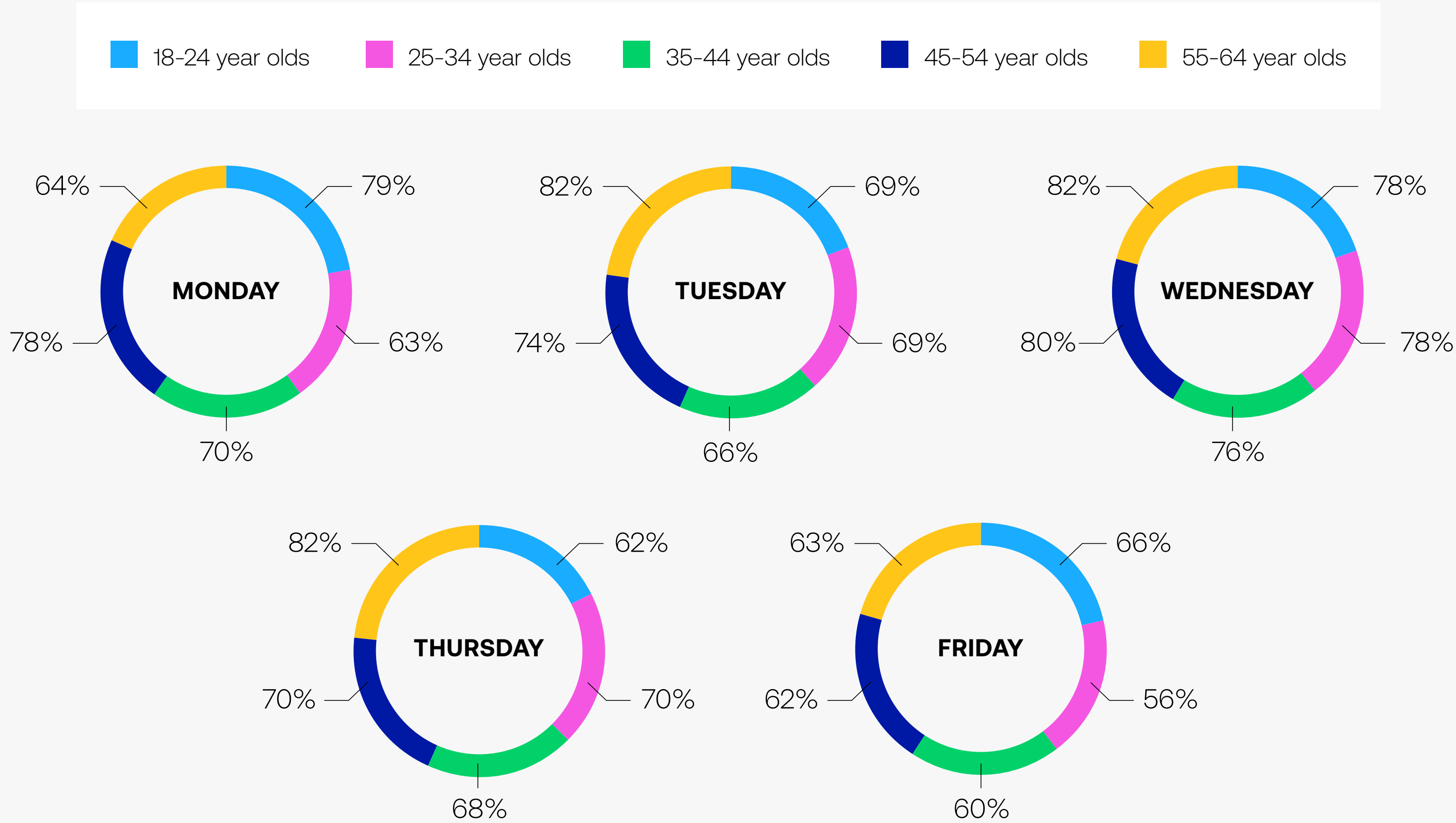
of employees report experiencing increased productivity in the office



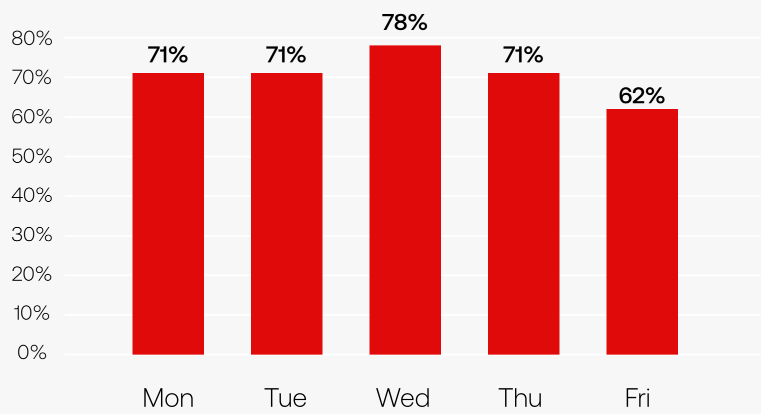
of employees report experiencing decreased productivity in the office

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

(Broken down by age groups)



Total



Retail

People are feeling pressure to save money and it's showing, with the data suggesting a significant drop in shopping for non-discretionary goods.

Consumers are shopping over 50% less for sporting and outdoor goods (52%), electronic goods (53%) and home goods and furniture (52%) compared to just three months ago.

This has resulted in individuals taking 43% fewer trips to city centre stores and 45% fewer trips to specialty stores), though local stores have proved resilient.

As a result, over four-fifths (83%) of retail businesses have seen a change in customers' shopping patterns over the past few months. Three quarters (73%) of businesses report responding to this change by adapting their sales and marketing strategies, as companies report investing more heavily in new marketing approaches, loyalty programmes, and personalised offers.

This has been welcomed by consumers who are also keen to reap the benefits of AI, as 7% of the public claim to have used chatbots and virtual assistants for the first time in the past month, including 17% of 18-24 year-olds.

While many cash-strapped shoppers are turning to digital channels to save money, O_2 Motion data shows more people are returning to the high street.

Shopping centres were once a go-to hangout spot for young people. But 18-to-24 year-olds are showing they're now more balanced than older age groups in where they choose to shop – visiting high street shops and shopping centres almost equally.

Meanwhile, people 65 and over and are spearheading the return to the high street with a 11.25% increase in weekend shopping trips from January to March.

7%

of the public claim to have used chatbots and virtual assistants for the first time in the past month

11.25%

increase in weekend shopping trips from January to March, aged 65+

52%

decrease in spending on sporting and outdoor goods

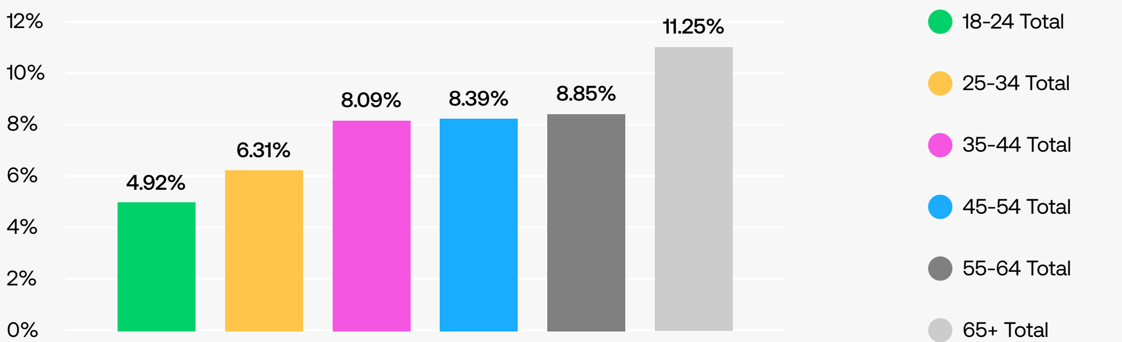
53%

decrease in spending on electronic goods

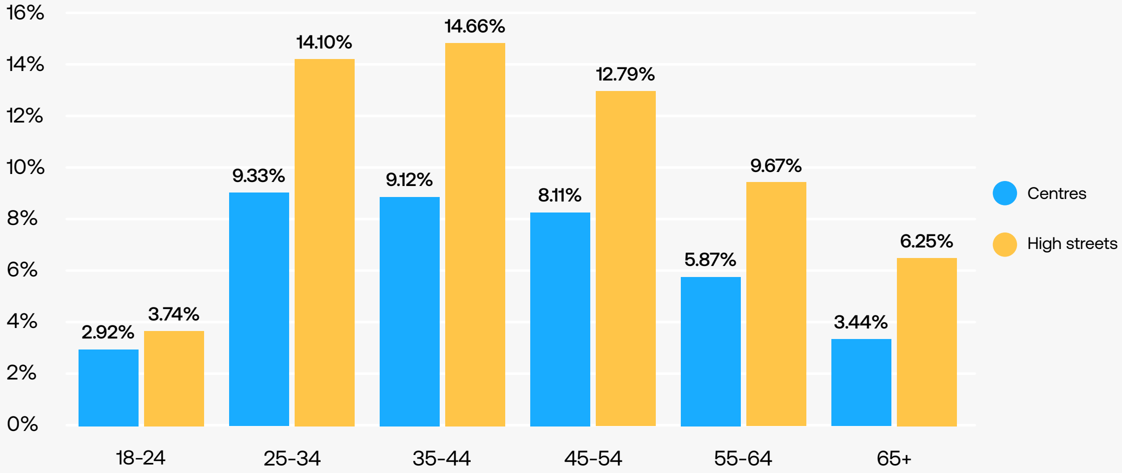
52%

decrease in spending on home goods and furniture

Growth in retail trips during Q1 is larger among older groups



Proportion of weekend retail trips by age and destination



Transport

The UK experienced a series of transport strikes between January and March, but this did not get in the way of Britons making moves.

More than half (63%) of respondents have maintained the same use of public transport compared with only 14% who reduced their trips.

Across all British regions, buses were the preferred mode of transport for journeys outside of commuting, with seven out of ten (71%) North Easterners opting to take the bus followed closely by more than half of surveyed Londoners (64%) and Scots (63%).

Respondents in Scotland are also leading the pack in usage of rail services, with 61% choosing to take trains as part of their travel. Rail is less popular in other regions, however, with only one in ten (13%) in the North East and a fifth (21%) in the South West choosing to take a train to get from point A to point B.

O_2 Motion data confirms the popularity of trains within certain regions as the biggest increase in rail journeys along the West Coast Main Line are being led by people travelling from Carlisle Rail Station (62%) and Liverpool Lime Street Rail Station (45%).

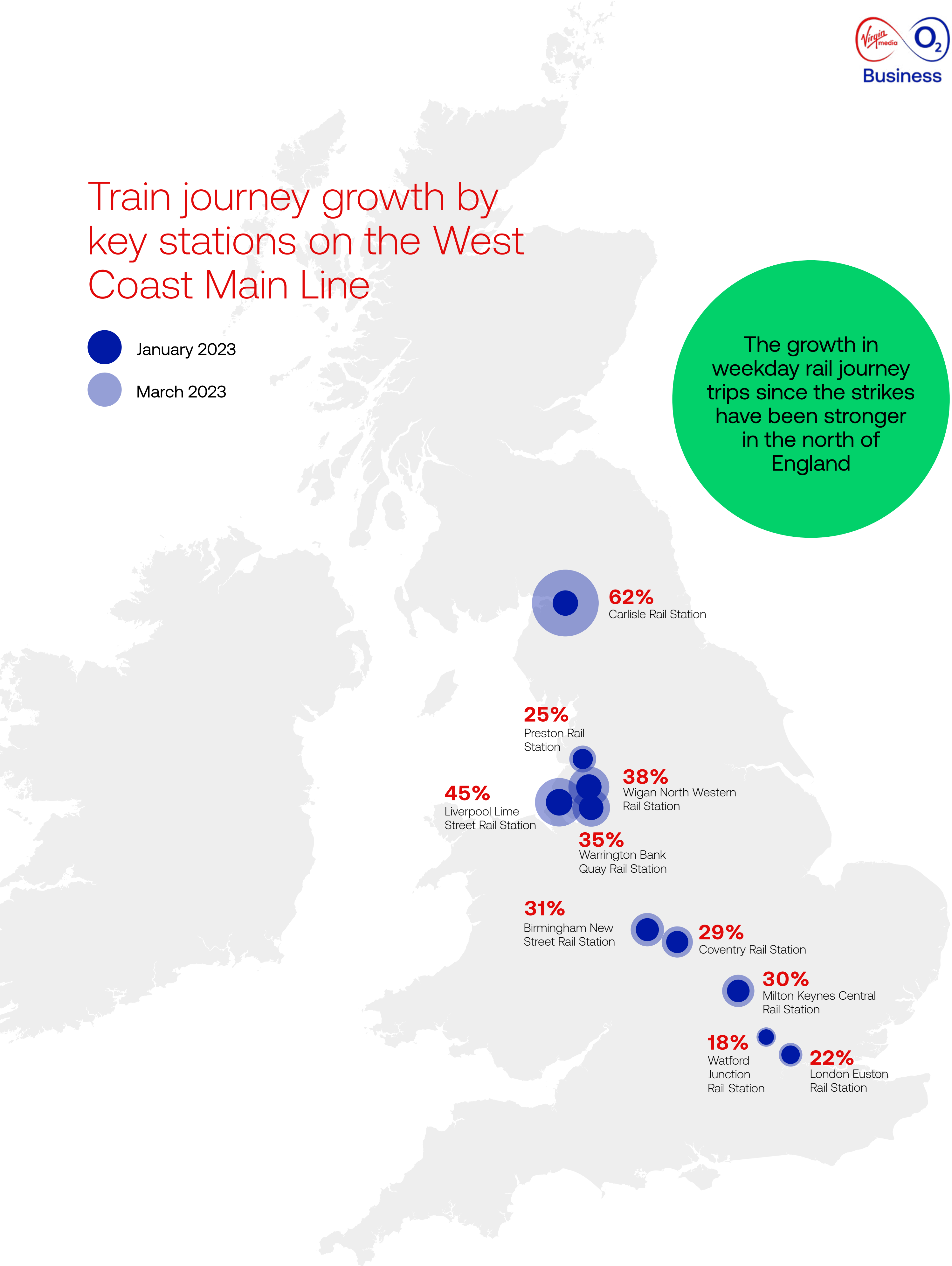
While there is a steady use of public transport, one age group is particularly keen to travel back into work.

Over half (58%) of 18–24 year-olds say that they've increased their trips to work in the past month, compared with just 45% of 24-34 year-olds.

Confirming the trend, over a third (38%) of employers say that their employees are coming into work more (compared with 14% who saw a decrease).

And optimistic companies expect business to be booming, as 62% of organisations surveyed are anticipating positive benefits to come from the change they're seeing in customers' travel patterns.

Train journey growth by key stations on the West Coast Main Line



The growth in weekday rail journey trips since the strikes have been stronger in the north of England

Coronation

Despite cost-of-living concerns, the British public and businesses were eagerly anticipating the May bank holidays and the King's Coronation.

Three-quarters of businesses predicted these events would impact their revenue. 44% of them were expecting revenues to spike, compared to a quarter (25%) who expected them to be negatively impacted.

Big hopes for the Coronation have led 51% of businesses surveyed to predict the event should bring in more revenue than the Platinum Jubilee celebrations.

In anticipation of the expected increase in demand, 53% of businesses were planning to increase their staffing levels in May to cope. And 20% were planning new social media/marketing campaigns around the Coronation, while 17% were aiming to organise special events.

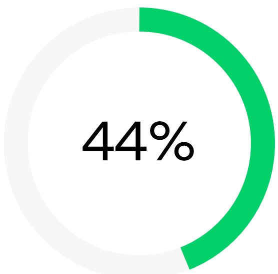
Optimism around the Coronation was not limited to businesses, with over a third (36%) of the public considering taking a trip for the Coronation bank holiday, including one in eight (12.5%) planning a UK staycation.

Home to Buckingham Palace and the location for the King's parade procession, it's no surprise that London was the top staycation destination, with Manchester taking second place.

For the Queen's Coronation in 1953, an estimated 3 million people came to see the parade procession and 27 million people in Britain watched the ceremony on TV (the population of Britain at the time was just over 36 million.)

O_2 Motion data reveals that for the King's Coronation over 114,000 Brits made the trip to central London to line the procession route. Celebrations didn't stop after the parade; after the mall, the busiest part of London on May 6th was central Soho at 9pm with over 12,500 revellers.

Outside of London, many gathered to watch the Coronation on public screens. Following central London, the busiest UK areas were Manchester's Piccadilly Gardens with over 2,800 visitors, Millennium Square in Leeds with over 2,100 and Birmingham's Centenary Square with over 1,600 viewers.



of businesses predict a spike in revenues over the Coronation bank holiday

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 1,000 nationally representative members of the public (by age, gender and NUT1 region) online between 28 April 2023 and 2 May 2023. 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) 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.**

Appendix

All table and charts in the appendix are based on O_2 Motion data

Commuting

Table 1

Daily Average number of weekday trips to major towns and cities in the time period from 6am to 11am.

Location	January	February	March	% difference Jan-Mar
Birmingham	444,547	458,005	461,200	4%
Bristol	211,689	218,835	225,101	6%
Cambridge	95,350	97,480	97,873	3%
Cardiff	155,450	167,201	173,651	12%
City of Edinburgh	237,916	256,878	266,511	12%
Glasgow City	296,480	323,009	330,833	12%
Leeds	254,649	263,165	265,049	4%
London	576,317	636,492	632,029	10%
Manchester	254,000	269,870	275,677	9%
Newcastle upon Tyne	146,967	157,242	159,742	9%
Nottingham	141,620	148,267	149,752	6%
Reading	93,230	93,498	98,619	6%
Sheffield	254,336	257,262	255,668	1%

Chart 1

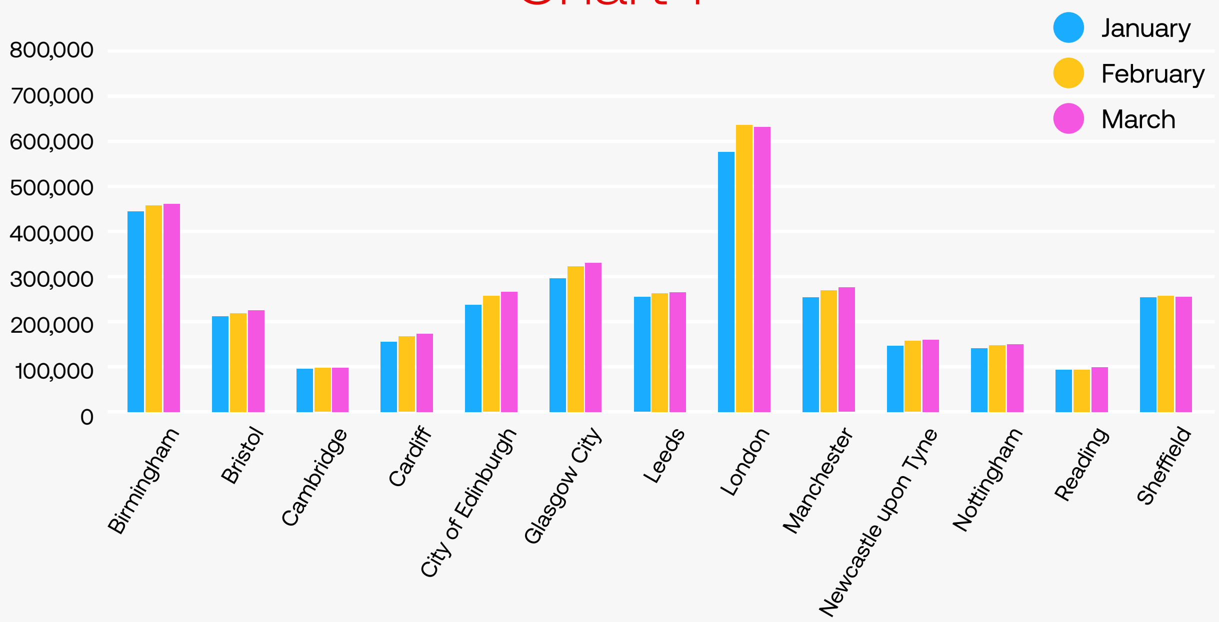


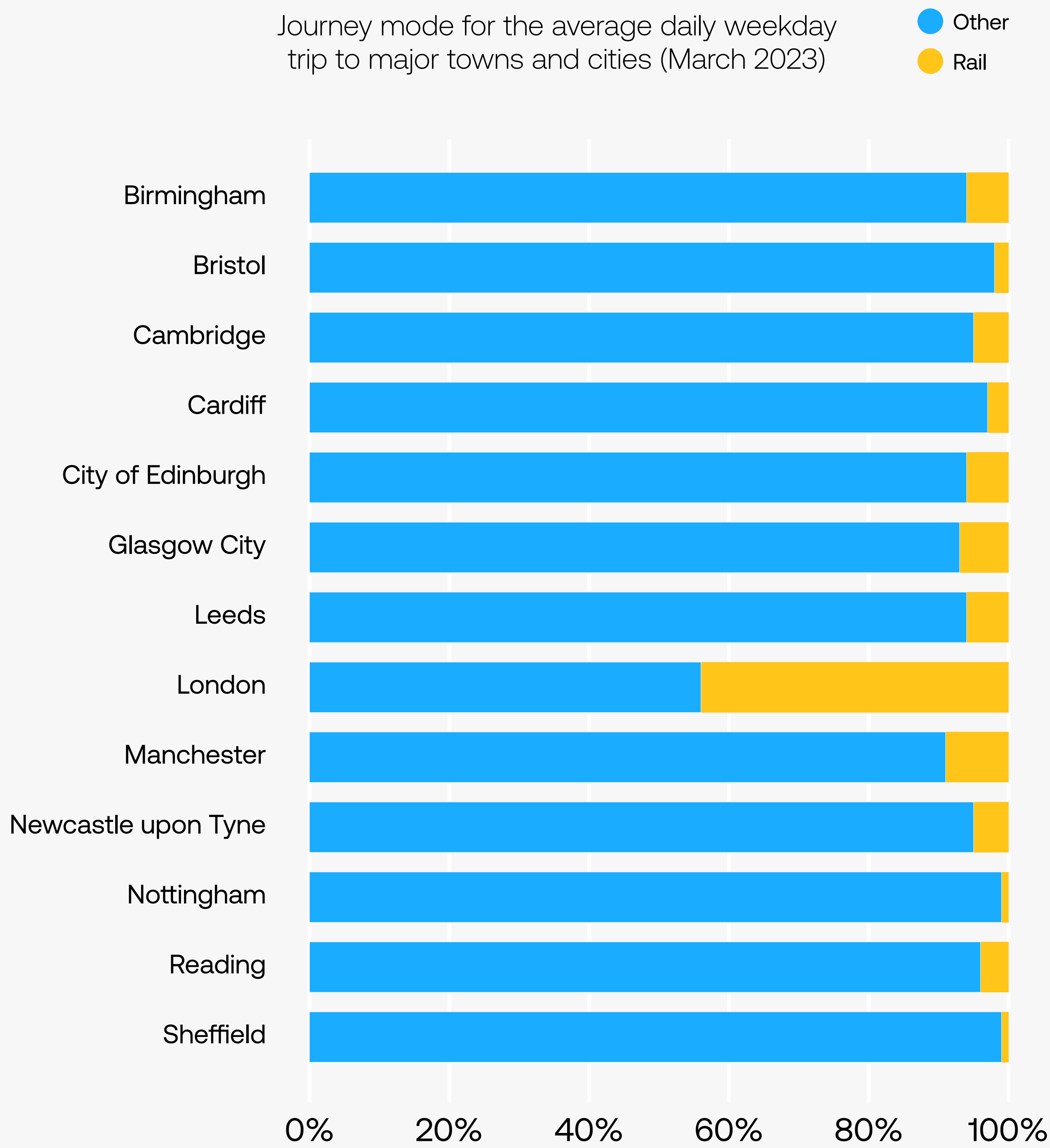
Table 2

Weekday journey mode share (rail vs other)
for trips to major towns and cities

Location	Mode	Mode share (%) Jan	Mode share (%) Feb	Mode share (%) Mar	Number of trips Jan	Number of trips Feb	Number of trips Mar	% diff. Jan-Mar
Birmingham	Other	96%	93%	94%	425,140	427,650	433,053	2%
Birmingham	Rail	4%	7%	6%	19,407	30,355	28,147	45%
Bristol	Other	98%	97%	98%	207,561	212,715	219,859	6%
Bristol	Rail	2%	3%	2%	4,129	6,120	5,242	27%
Cambridge	Other	96%	94%	95%	91,252	91,840	92,561	1%
Cambridge	Rail	4%	6%	5%	4,098	5,640	5,312	30%
Cardiff	Other	98%	96%	97%	151,794	10,484	167,672	10%
Cardiff	Rail	2%	4%	3%	3,656	6,717	5,979	64%
City of Edinburgh	Other	95%	93%	94%	226,487	239,801	249,985	10%
City of Edinburgh	Rail	5%	7%	6%	11,430	17,078	16,527	45%
Glasgow City	Other	95%	92%	93%	280,776	298,361	308,798	10%
Glasgow City	Rail	5%	8%	7%	15,703	24,648	22,035	40%
Leeds	Other	96%	93%	94%	243,745	245,507	249,541	2%
Leeds	Rail	4%	7%	6%	10,904	17,658	15,509	42%
London	Other	61%	55%	56%	350,921	347,406	355,419	1%
London	Rail	39%	45%	44%	225,396	289,086	276,611	23%
Manchester	Other	92%	89%	91%	233,865	241,039	250,479	7%
Manchester	Rail	8%	11%	9%	20,136	28,831	25,199	25%
Newcastle upon Tyne	Other	97%	94%	95%	142,269	148,553	152,415	7%
Newcastle upon Tyne	Rail	3%	6%	5%	4,699	8,688	7,327	56%
Nottingham	Other	99%	99%	99%	140,419	146,347	148,164	6%
Nottingham	Rail	1%	1%	1%	1,201	1,920	1,588	32%
Reading	Other	96%	96%	96%	89,966	89,523	94,370	5%
Reading	Rail	4%	4%	4%	3,265	3,975	4,248	30%
Sheffield	Other	99%	99%	99%	252,386	253,761	252,758	0%
Sheffield	Rail	1%	1%	1%	1,950	3,501	2,910	49%

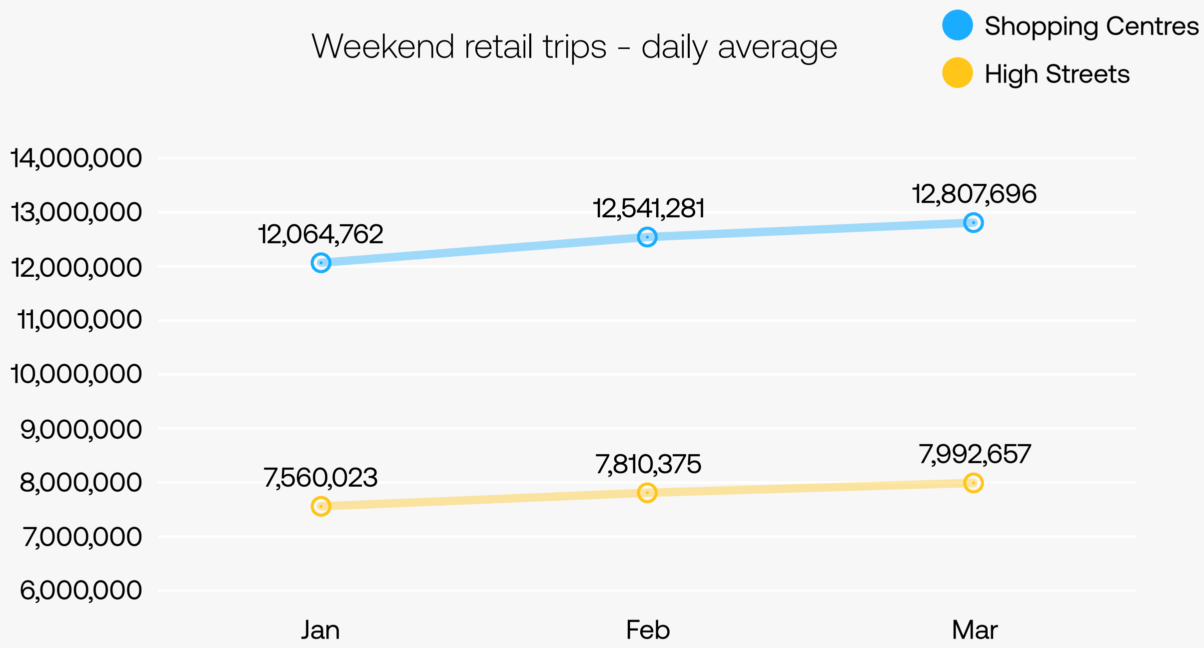
Chart 2

Journey mode for the average daily weekday trip to major towns and cities (March 2023)



Retail

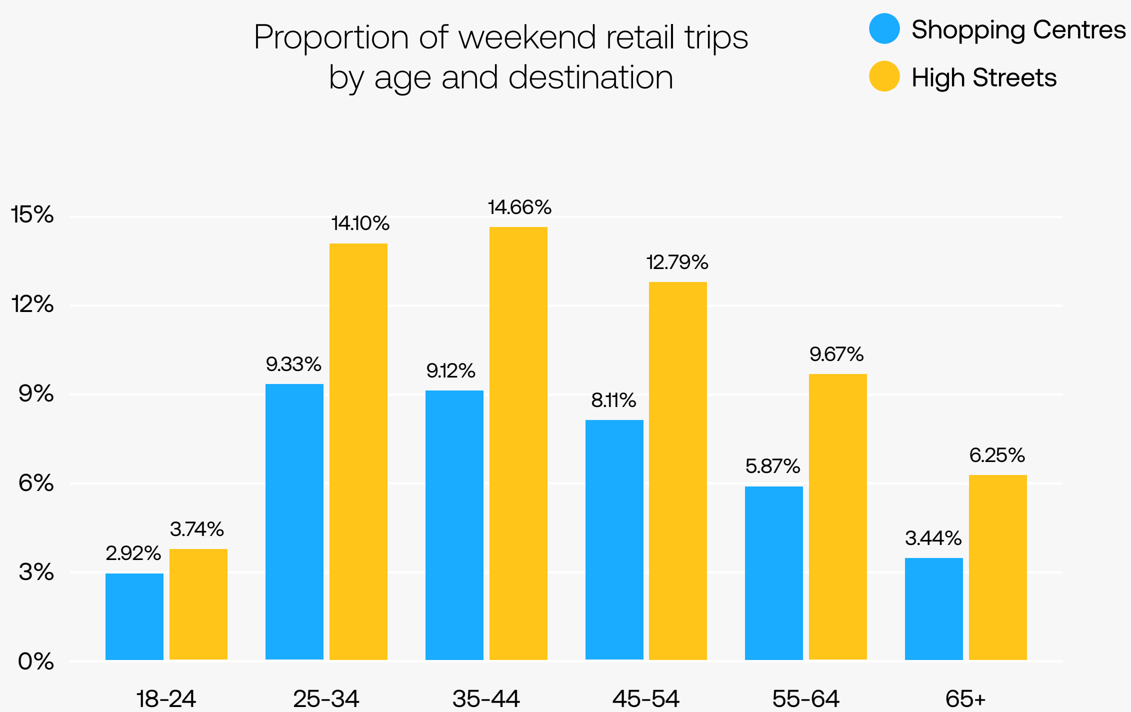
Charts 3 & 4


Weekend retail trips - daily average
Shopping Centres
High Streets
14,000,000
13,000,000
12,000,000
11,000,000
10,000,000
9,000,000
8,000,000
7,000,000
6,000,000
12,064,762
12,541,281
12,807,696
7,560,023
7,810,375
7,992,657
Jan
Feb
Mar

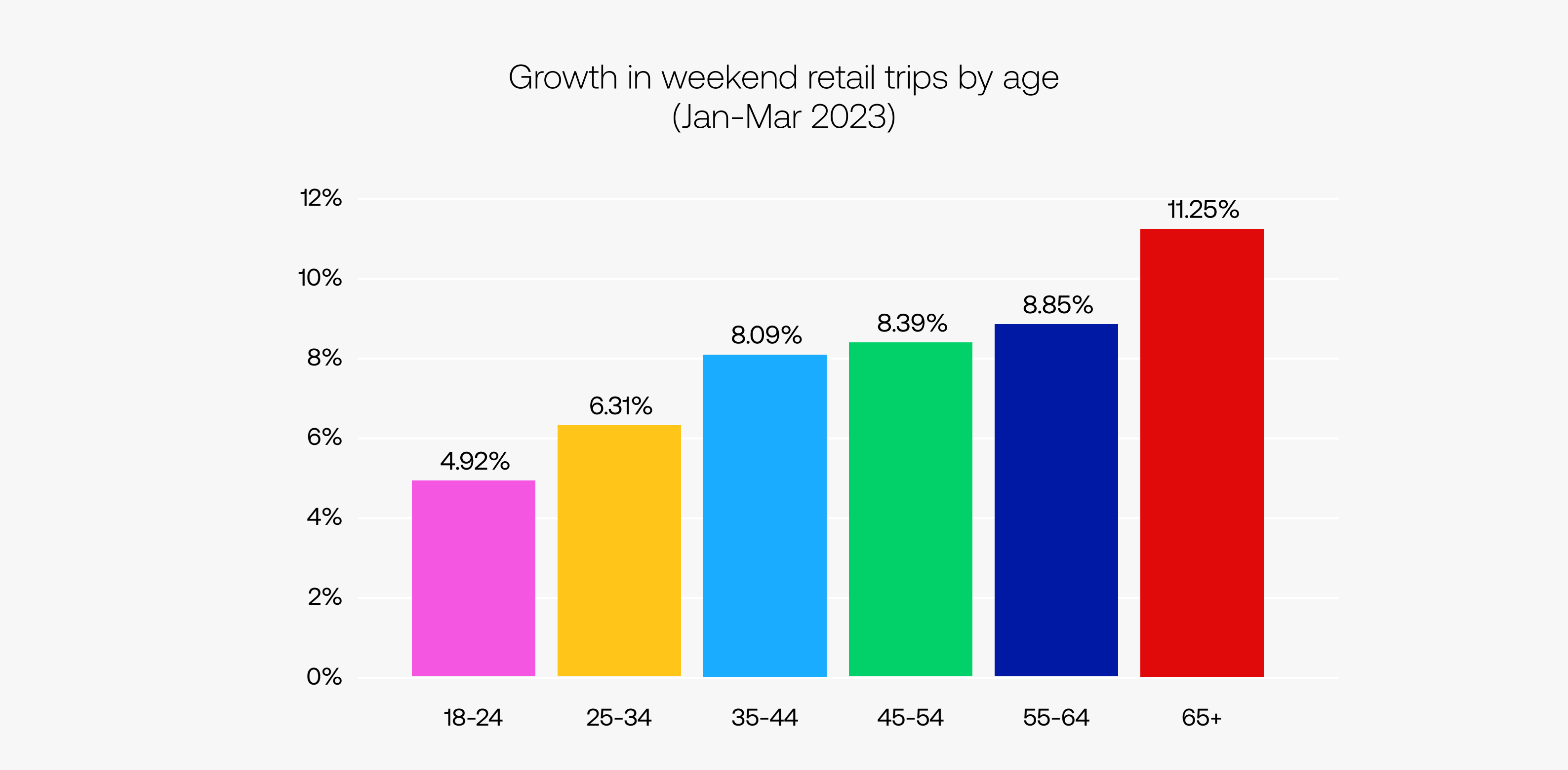

Weekend retail trips - daily average
15,000,000
12,000,000
9,000,000
6,000,000
3,000,000
0
7,787,685
12,471,246
Shopping Centres
High Streets

Charts 5 & 6

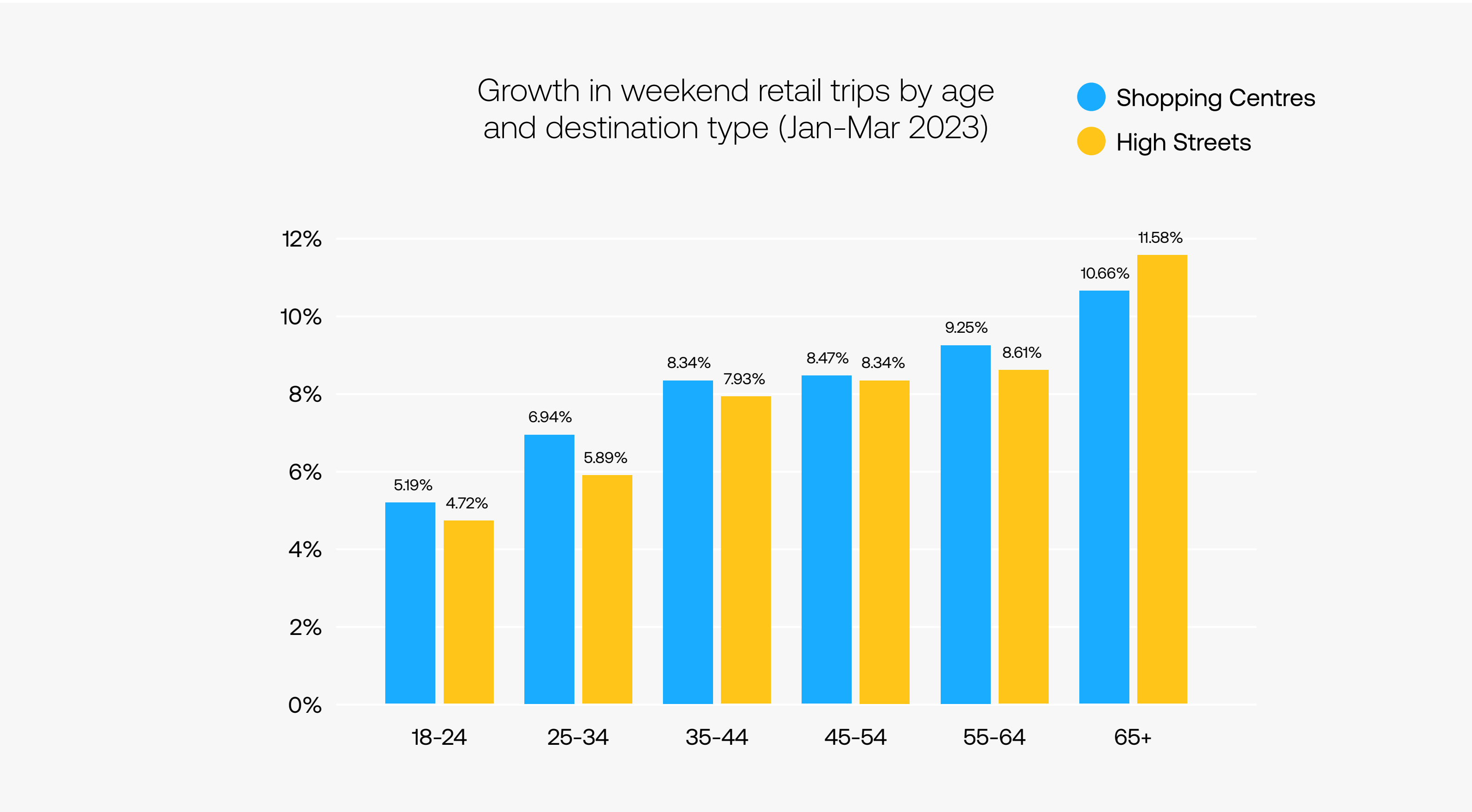

Growth in weekend retail trips
(Jan-Mar 2023)
Shopping Centres
High Streets
7%
6%
5%
4%
3%
2%
1%
0%
5.72%
6.16%
Shopping Centres
High Streets


Proportion of weekend retail trips
by age and destination
Shopping Centres
High Streets
15%
12%
9%
6%
3%
0%
2.92%
3.74%
9.33%
14.10%
9.12%
14.66%
8.11%
12.79%
5.87%
9.67%
3.44%
6.25%
18-24
25-34
35-44
45-54
55-64
65+

Charts 7 & 8

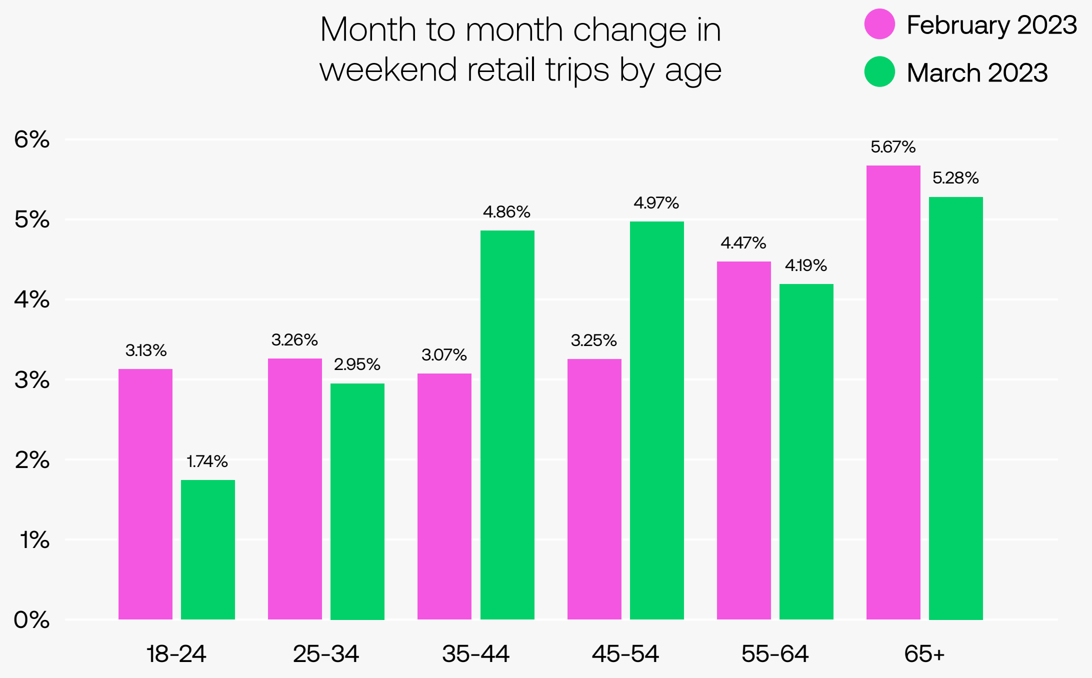


Growth in weekend retail trips by age
(Jan-Mar 2023)
12%
10%
8%
6%
4%
2%
0%
4.92%
6.31%
8.09%
8.39%
8.85%
11.25%
18-24
25-34
35-44
45-54
55-64
65+

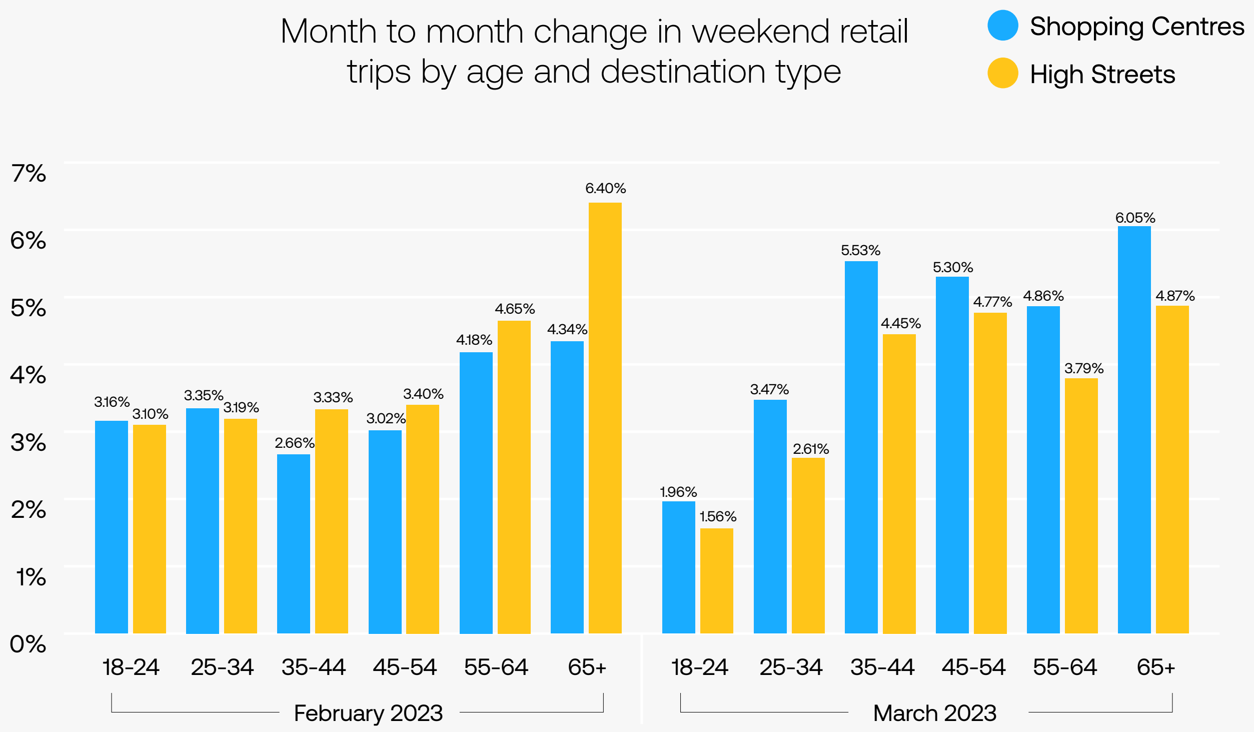


Growth in weekend retail trips by age
and destination type (Jan-Mar 2023)
Shopping Centres
High Streets
12%
10%
8%
6%
4%
2%
0%
5.19%
4.72%
6.94%
5.89%
8.34%
7.93%
8.47%
8.34%
9.25%
8.61%
10.66%
11.58%
18-24
25-34
35-44
45-54
55-64
65+

Charts 9 & 10



Month to month change in weekend retail trips by age
February 2023
March 2023
6%
5%
4%
3%
2%
1%
0%
3.13%
1.74%
3.26%
2.95%
3.07%
4.86%
3.25%
4.97%
4.47%
4.19%
5.67%
5.28%
18-24
25-34
35-44
45-54
55-64
65+



Month to month change in weekend retail trips by age and destination type
Shopping Centres
High Streets
7%
6%
5%
4%
3%
2%
1%
0%
3.16%
3.10%
3.35%
3.19%
2.66%
3.33%
3.02%
3.40%
4.18%
4.65%
4.34%
6.40%
1.96%
1.56%
3.47%
2.61%
5.53%
4.45%
5.30%
4.77%
4.86%
3.79%
6.05%
4.87%
18-24
25-34
35-44
45-54
55-64
65+
February 2023
March 2023

Transport

Table 3

Average number of weekday rail journeys originating from stations on the West Coast Main Line during Q1 2023

Location	January	February	March	% difference Jan-Mar
Birmingham New Street Rail Station	6,976	10,096	9,151	31%
Carlisle Rail Station	242	347	392	62%
Coventry Rail Station	4,545	6,282	5,853	29%
Liverpool Lime Street Rail Station	1,969	3,292	2,863	45%
London Euston Rail Station	15,409	20,403	18,819	22%
Milton Keynes Central Rail Station	2,624	3,583	3,405	30%
Preston Rail Station	978	1,348	1,219	25%
Warrington Bank Quay Rail Station	722	1,203	975	35%
Watford Junction Rail Station	7,498	9,343	8,863	18%
Wigan North Western Rail Station	437	750	603	38%

Table 4

Daily average number of rail trips between countries in the UK by month (excluding NI)

Start	End	January	February	March	% difference Jan-Mar
England	England	2,133,904	2,832,925	2,681,025	26%
England	Scotland	9,986	15,791	13,001	30%
England	Wales	8,224	13,447	11,576	41%
Scotland	England	11,382	18,112	14,685	29%
Scotland	Scotland	91,598	148,857	144,543	58%
Scotland	Wales	87	221	74	-15%
Wales	England	9,974	15,795	13,919	40%
Wales	Scotland	58	118	57	-2%
Wales	Wales	18,301	36,614	33,067	81%

Table 5

Age distribution for trips to major towns and cities
Weekdays - January 2023

Location	18-24	25-34	35-44	45-54	55-64	65+
Birmingham	40,710	134,125	136,834	116,481	80,702	45,223
Bristol	22,227	65,140	63,908	57,277	43,590	27,524
Cambridge	5,645	18,167	21,129	20,793	14,831	10,310
Cardiff	15,565	44,870	45,148	42,391	31,359	21,479
City of Edinburgh	23,733	73,668	76,260	75,100	61,286	39,964
Glasgow City	32,553	102,796	95,828	89,458	78,530	41,069
Leeds	31,333	83,472	82,104	73,966	55,112	33,276
London	32,561	150,065	171,929	142,155	101,231	56,447
Manchester	30,448	84,093	75,987	69,919	46,975	23,297
Newcastle upon Tyne	16,809	40,636	40,510	41,926	34,837	21,174
Nottingham	14,648	34,811	36,124	36,766	23,892	12,857
Reading	9,820	27,926	34,893	30,738	22,611	14,286
Sheffield	26,895	75,085	74,716	74,983	56,278	36,217

Table 6

Age distribution for trips to major towns and cities
Weekdays - March 2023

Location	18-24	25-34	35-44	45-54	55-64	65+
Birmingham	41,444	138,340	141,276	123,098	85,674	47,239
Bristol	23,382	70,061	69,620	62,434	47,521	29,612
Cambridge	5,848	19,142	22,284	21,631	15,484	10,851
Cardiff	16,272	47,506	49,434	47,395	34,407	22,722
City of Edinburgh	26,012	81,381	85,212	83,736	68,920	44,404
Glasgow City	35,704	113,241	105,312	97,879	85,648	45,076
Leeds	34,234	88,686	87,882	80,909	59,487	35,454
London	35,628	166,874	190,474	158,935	112,984	63,780
Manchester	33,225	89,663	82,563	77,980	51,808	25,331
Newcastle upon Tyne	18,046	43,398	44,113	46,039	37,719	22,449
Nottingham	15,756	36,583	38,603	41,051	26,557	13,592
Reading	9,746	29,670	37,572	32,856	24,205	15,580
Sheffield	27,229	75,600	76,251	77,200	57,279	36,073

Table 7

Age distribution for trips to major towns and cities
Weekdays - Percentage difference Jan/Mar 2023

Location	18-24	25-34	35-44	45-54	55-64	65+
Birmingham	2%	3%	3%	6%	6%	4%
Bristol	5%	8%	9%	9%	9%	8%
Cambridge	4%	5%	5%	4%	4%	5%
Cardiff	5%	6%	9%	12%	10%	6%
City of Edinburgh	10%	10%	12%	11%	12%	11%
Glasgow City	10%	10%	10%	9%	9%	10%
Leeds	9%	6%	7%	9%	8%	7%
London	9%	11%	11%	12%	12%	13%
Manchester	9%	7%	9%	12%	10%	9%
Newcastle upon Tyne	7%	7%	9%	10%	8%	6%
Nottingham	8%	5%	7%	12%	11%	6%
Reading	-1%	6%	8%	7%	7%	9%
Sheffield	1%	1%	2%	3%	2%	0%

Table 8

Age distribution for trips to major towns and cities
Weekends - January 2023

Location	18-24	25-34	35-44	45-54	55-64	65+
Birmingham	40,211	123,001	117,368	97,977	65,678	35,535
Bristol	21,961	61,373	56,487	49,599	36,405	21,167
Cambridge	5,192	15,590	18,140	17,537	11,825	7,861
Cardiff	14,961	42,462	41,408	38,033	26,783	16,578
City of Edinburgh	23,535	72,136	70,803	67,197	53,048	33,002
Glasgow City	31,869	99,571	87,500	80,423	67,999	34,867
Leeds	29,359	74,674	70,368	62,480	44,144	25,812
London	32,751	152,596	157,921	127,843	91,582	51,539
Manchester	31,110	81,423	68,008	61,411	41,287	20,425
Newcastle upon Tyne	16,034	37,429	35,375	36,265	29,169	16,320
Nottingham	13,955	31,043	30,818	31,281	19,716	10,065
Reading	9,305	26,268	32,130	27,535	18,927	10,832
Sheffield	25,664	69,921	66,570	65,663	46,663	28,238

Table 9

Age distribution for trips to major towns and cities
Weekends - March 2023

Location	18-24	25-34	35-44	45-54	55-64	65+
Birmingham	42,027	133,541	127,957	109,236	74,326	40,144
Bristol	23,137	67,064	62,380	55,035	40,509	24,068
Cambridge	5,510	17,549	19,751	19,175	12,941	8,532
Cardiff	15,922	44,722	44,810	41,680	28,980	17,897
City of Edinburgh	26,179	82,230	80,744	77,748	62,321	38,180
Glasgow City	34,849	107,730	95,663	87,146	73,918	37,757
Leeds	32,109	79,886	77,077	70,402	49,212	28,763
London	35,543	172,467	178,011	145,317	103,918	60,168
Manchester	34,190	87,536	73,605	69,387	46,122	22,775
Newcastle upon Tyne	16,919	40,794	39,236	40,008	31,680	17,789
Nottingham	14,544	33,855	34,001	34,815	21,584	11,026
Reading	9,601	28,039	35,186	29,633	20,533	12,019
Sheffield	26,287	71,595	69,450	69,124	48,394	28,670

Table 10

Age distribution for trips to major towns and cities
Weekends - Percentage difference Jan/Mar 2023

Location	18-24	25-34	35-44	45-54	55-64	65+
Birmingham	5%	9%	9%	11%	13%	13%
Bristol	5%	9%	10%	11%	11%	14%
Cambridge	6%	13%	9%	9%	9%	9%
Cardiff	6%	5%	8%	10%	8%	8%
City of Edinburgh	11%	14%	14%	16%	17%	16%
Glasgow City	9%	8%	9%	8%	9%	8%
Leeds	9%	7%	10%	13%	11%	11%
London	9%	13%	13%	14%	13%	17%
Manchester	10%	8%	8%	13%	12%	12%
Newcastle upon Tyne	6%	9%	11%	10%	9%	9%
Nottingham	4%	9%	10%	11%	9%	10%
Reading	3%	7%	10%	8%	8%	11%
Sheffield	2%	2%	4%	5%	4%	2%

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