

Movers Index

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

Q3 2024 Edition



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Intro

Latest trends in retail and travel

As we approach the end of the year, we are excited to reveal the latest insights into retail, commuting, and travel trends from Q3. Our quarterly Movers Index reports provide a comprehensive analysis of evolving movement trends, based on anonymised and aggregated data sourced from O₂ mobile masts.



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This data, which is expertly examined by our team of data scientists and engineers, offers a detailed look at how people are shopping, commuting, and traveling across the nation.

This new edition examines O₂ Motion data, supplemented by polling from 2,000 businesses and 2,000 consumers. Together, these sources provide a glimpse into shifts in retail behaviour, commuting trends, and how key events – like back-to-school and the upcoming festive season – are shaping spending priorities. Retailers can leverage these insights to make more informed decisions that benefit their business and their customers.

As always, the Virgin Media O₂ Business Movers Index is available to anyone interested in the trends reshaping the UK.

Explore our latest report to uncover the trends defining the second half of 2024.

Commuting

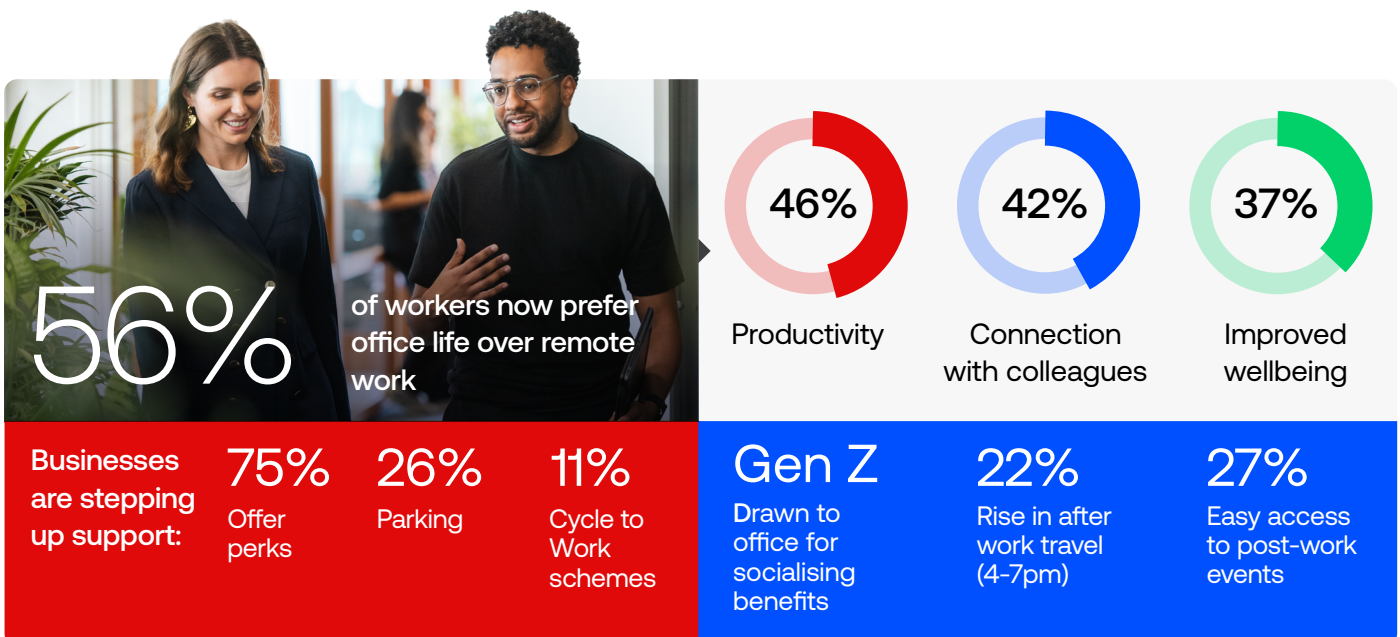
Commuting is on the rise, with 90% of office workers commuting at least once a week, and nearly half (48%) back to five days a week

However, weekday morning peak rail trips to major towns have fallen by 12% compared to Q3 last year, signalling a shift towards more off-peak rail travel, with a 6% rise in rail trips between 11am and 4pm. In line with this trend, 19% of workers have adjusted their commute to cut costs, and 59% say that price plays a larger role in how they choose to travel to and from work.

Businesses are stepping up support, with 75% offering perks like parking (26%) and Cycle to Work schemes (11%). Meanwhile, 36% of workers are required to be in the office daily, and 61% at least four days a week, with 92% of companies enforcing at least one in-office day.

Over half (56%) of workers now prefer office life over remote work, citing productivity (46%), connection with colleagues (42%), and improved well-being (37%) as key reasons. For Gen Z (18-24-year-olds), the office appeal is also reflected in the growth of post-work trips, with a 22% rise in after-work travel (4-7pm), compared to declines in older age groups. Younger workers appear to be drawn to the office for socialising benefits, with 27% liking office days for easy access to post-work events.

Office attendance is boosting spending, with 26% of workers buying tea or coffee daily in winter, and 70% doing so weekly, spending an average of £26 a week. Meal deals (53%) and coffee loyalty programs (26%) are popular, with 90% of workers enrolled in at least one retail loyalty scheme. For over half (58%), these perks encourage them to work in the office, rising to 72% among Gen Z.



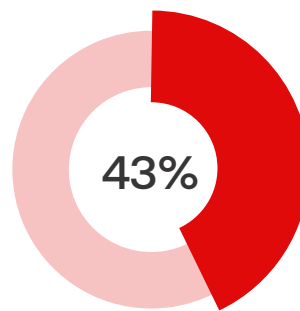
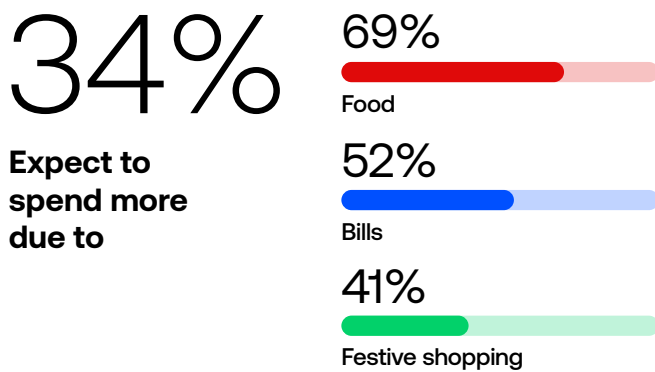
Retail

Rising costs continue to impact households

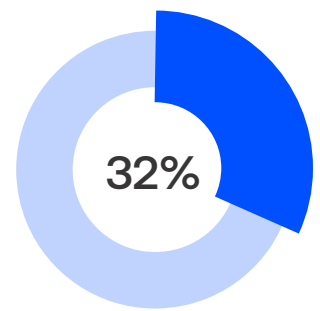
34% of Brits expect to spend more in the coming months due to food (69%), bills (52%), and festive shopping (41%). Meanwhile, 43% are cutting back on non-essentials and 32% are switching to cheaper brands.

Visits to high streets and shopping centres fell by 10% this quarter compared to last year. However, September showed a shift, with shopping centres

up 6% while high streets grew by 3%. For older shoppers, trips to high streets dropped significantly, 29% for those aged 55-64 and 27% for those 65 and older, while shopping centre visits increased by 19% and 18%. This trend suggests rising costs and colder weather may be driving these consumers to prefer the convenience and comfort of shopping centres. Overall, these patterns highlight the evolving retail landscape and the resilience of physical stores.



Cutting back on non-essentials



Switching to cheaper brands



High street resilience

Support for the high street remains strong, with 56% of Brits valuing it, and 46% planning to spend more at small or local businesses. Despite economic challenges, many consumers are willing to pay up to 28% extra for ethical or local shopping, for items in high street stores or those with good ESG credentials.

In-store experiences

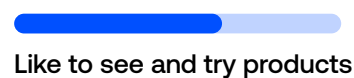


In-store shopping holds its own; 62% of Brits value the chance to see and try products, while 48% enjoy human interaction and 46% appreciate the avoidance of delivery fees. However, 53% are put off by overcrowding and poor service during busy periods - leading 47% of shoppers to avoid certain retailers in the future.

56%

British shoppers value the high street

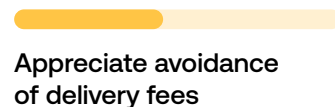
62%



48%



46%



Impact of tech

Tech is shaping in-store experience, with 58% of shoppers using tech to enhance their visits. Self-checkouts (32%) and good Wi-Fi (27%) are top draws, especially for younger consumers, but 38% find self-checkouts frustrating, and 36% having left stores due to tech-related issues.

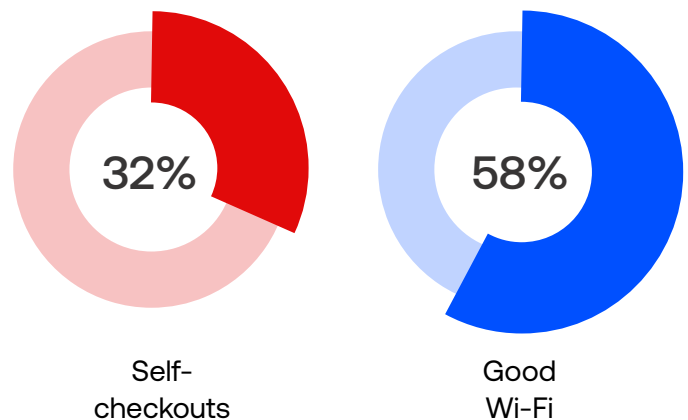
Festive predictions

With the holiday season approaching, 51% plan to shop online, while 37% will hit the high street for the chance to see and try products (50%) and snap in-store discounts (44%). The holiday rush starts early this year, with 43% of Brits beginning their shopping in October or earlier to avoid last-minute stress.

Seasonal offers remain a key focus, with 58% targeting discounts and 32% focused on Black Friday – 64% of businesses expect it to boost revenues. As for gifts, 34% are opting for more affordable options, with growing interest in experiences (19%), eco-friendly presents (15%), and charitable donations (14%).

58%

Shoppers use tech to enhance their visit



Holiday trends

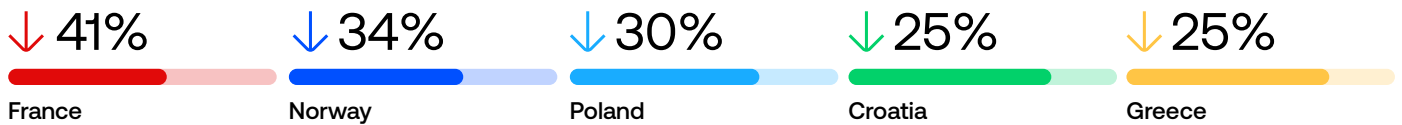
From summer to September

The top 10 global summer holiday destinations for UK travellers this year were:

1. Spain	6. Portugal
2. France	7. Poland
3. Greece	8. United States
4. Italy	9. Germany
5. Turkey	10. Netherlands

Among these, the United States was the only non-EU country in the top 10.

However, as summer transitioned into September, several of these popular destinations saw a decline in UK visitors. France experienced the largest drop, with a 41% decrease in trips, likely due to the Olympics ending. Other destinations saw notable declines including: Norway (34%), Poland (30%), Croatia (25%), and Greece (15%).



Paris Olympics

Overall, the average daily trips during the two Olympic weeks were 23% higher than the two weeks before, and 13% higher than the two weeks after.

Notably, the number of people from England visiting during the first week of the Olympics (27/07 to 02/08) was approximately 6% higher than week 2 (03/08 to 09/08). This decrease in trips became more pronounced as the post-Olympic period progressed, with a 36% decline by late August. By early September, trips decreased reflecting a gradual return to pre-Olympic travel patterns.

England showed the highest increase in trips in the UK during the Olympics, surging by 49.5% over the early pre-Olympic period. Scotland and Northern Ireland displayed varied trends, with Scotland experiencing a substantial 41.6% drop in trips during the Olympic period. Despite the regional differences, the data indicates that Olympic-related travel spiked during the event, followed by a staggered but steady decline as summer ended.

Methodology

O₂ 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 O₂ represents 35% of the UK's population. Through the use of advanced methodologies, O₂ 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. O₂ 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 28.06.24 - 02.07.24. 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