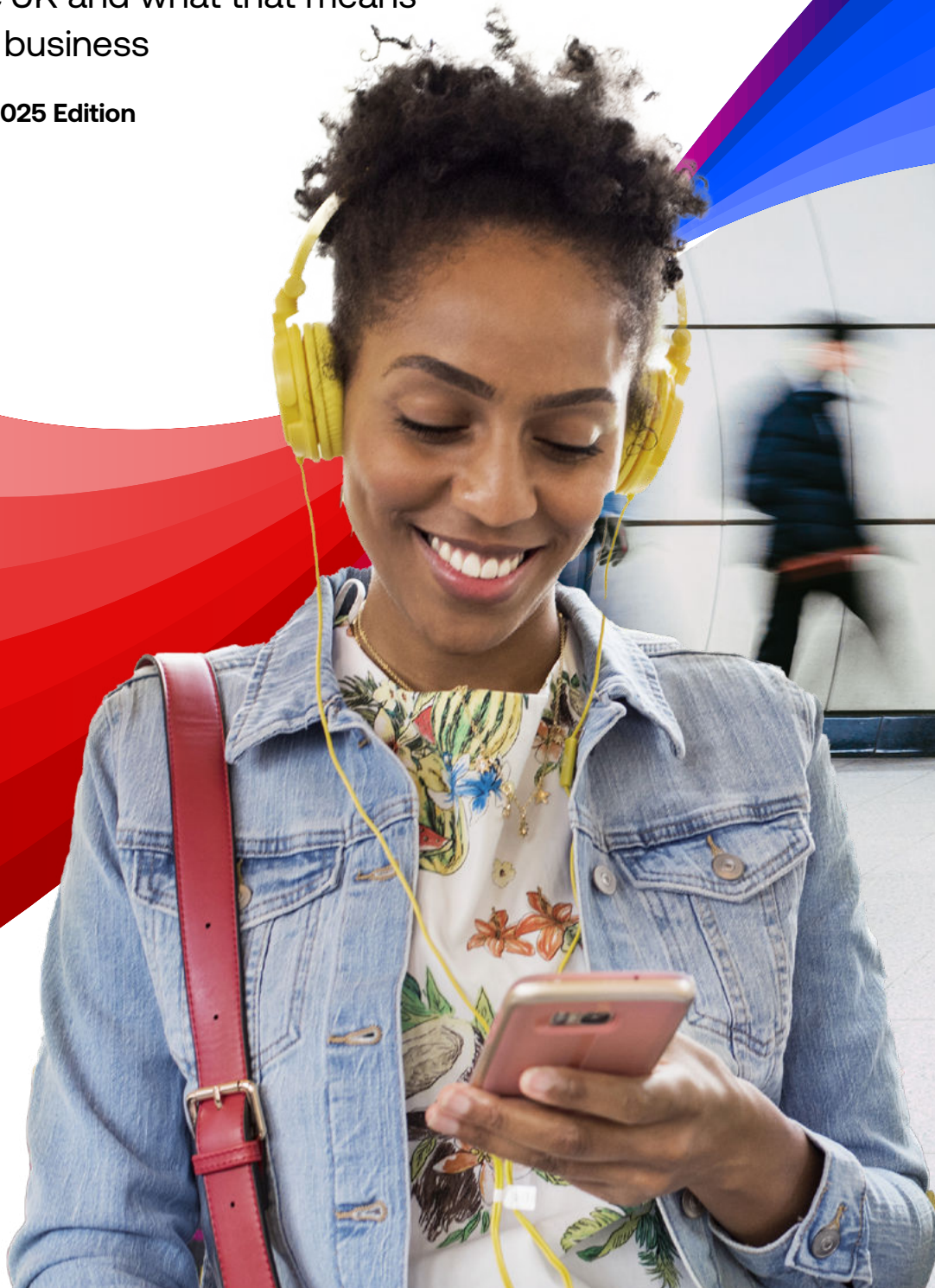


# Movers Index Report

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

**Q1 2025 Edition**



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# Foreword

As we step into 2025, we're thrilled to present our Q1 insights, offering a first look at the evolving trends shaping retail, commuting, and travel in the UK this year. This report provides valuable data to help businesses of all sizes navigate the shifting landscape they operate in, allowing leaders to take an agile and data-driven approach to challenges and opportunities.

Each quarter, our teams of data scientists and engineers meticulously analyse anonymised and aggregated data from the O2 mobile network, supplemented by polling from 2,000 businesses and 2,000 consumers. This allows us to build a comprehensive picture of movement trends on how people are shopping, commuting, and traveling across the country.

As hybrid work continues to redefine office dynamics, businesses are adapting to new commuting behaviours and consumer preferences. Shopping patterns are evolving, with an increasing reliance on digital purchases, yet local retail still holds strong appeal. Travel remains a key priority for many, with shifting preferences impacting both domestic and international holiday planning. Understanding these movements is crucial for businesses looking to maximise opportunities and plan effectively for the year ahead.

The Virgin Media O2 Business Movers Index is a free resource designed to provide curious individuals and decision-makers alike with access to reliable insights on commuting, shopping and travel. Whether you're a retailer aiming to drive footfall, a company adapting to workplace changes, or a business exploring consumer trends, this report provides a valuable snapshot of the trends shaping 2025.

We hope these insights feed your curiosity, support your strategic planning, and help you take measured steps for the year ahead.

**Jessica O'Connor**

Director of Product

Virgin Media O<sub>2</sub> Business

# Commuting

The first quarter of this year saw a 1% increase in weekday morning trips to major towns and cities compared to the same time last year, showing the return to work is continuing. However, there remain large differences in commute patterns through the week.

Wednesday is the most common commuting day, with 77% of workers traveling to the office on this day. Conversely, only 40% of employees commute on Fridays, and among 18-24-year-olds, this figure drops to just 25%. Monday is the most mandated in-office day, chosen by 65% of businesses, while Friday is the least mandated, at 46%. The primary reasons for requiring office attendance include improving productivity and performance (48%), and strengthening team morale (42%).

Opinions on the optimal number of office days vary, as 29% of workers favour a five-day work week, though this falls to 17% among younger employees. Instead, nearly a third (31%) of those aged 18-24 believe four days per week is ideal. Employees are increasingly considering factors such as mental well-being (62%), physical well-being (61%), and cost (60%) when evaluating their commuting habits.

Over the past year, 27% of office businesses have mandated that employees return to the workplace five days a week, while 69% have set a minimum requirement of three days per week. This figure drops to 52% among micro-SMEs, which are businesses with fewer than 10 employees.



**77%**

Workers commute on Wednesday

**40%**

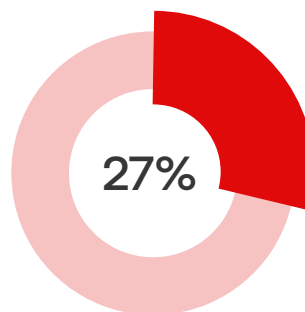
Commute on Fridays

**25%**

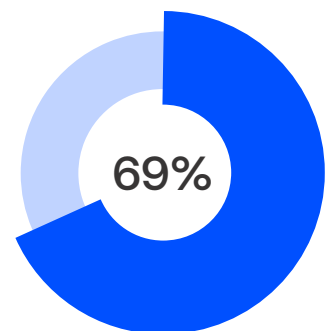
Gen Z commute on Fridays

**65%**

Business mandate Monday



Businesses require 5 day week



Businesses minimum requirement of 3 days a week



# Commuting

## Office comeback

Companies generally view the return to office positively, with 79% reporting that in-person interactions enhance team creativity and collaboration, 71% believe that office spaces are essential for their brand and identity, and 65% aim to rebuild a strong workplace culture. Additionally, 75% agree that regular face-to-face interactions help reduce misunderstandings. These views are born out in practice, with the 55-65 age group – those more likely to be in management positions – increasing their weekday morning trips by 8%, much higher than the average across all age groups of 1%.

To encourage employees to return, 36% of businesses offer flexible work hours, and 35% provide comfortable office amenities. Despite some concerns, 65% of workers have a favourable opinion on company mandates for returning to the office.

79%

In-person interactions enhance team creativity and collaboration

71%

Essential for brand & identity

65%

Rebuild workplace culture

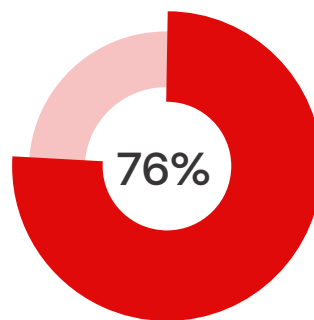
36%

Offer flexible work hours

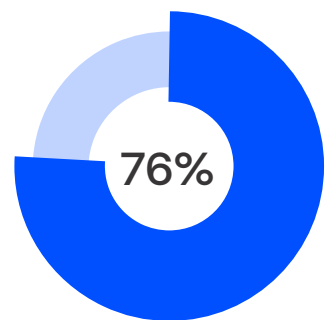


## Remote work trends

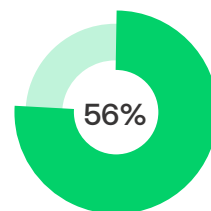
Remote work continues to have advantages, with businesses highlighting benefits such as improved physical well-being (76%) and mental well-being (76%) for employees. To enhance productivity at home, businesses commonly offer flexible work hours (37%) and establish clear communication channels with regular check-ins (37%). A quarter of workers prefer remote work, citing a better work-life balance (56%), cost savings (52%), and increased flexibility (51%). This flexibility is leading to changing mobility patterns. While weekday morning trips increased from last year, trips into major towns and cities on weekday evenings in Q1 fell by 3% (16:00-18:59) and 3% (19:00-23:59) compared to the same period in 2024. This suggests changing office working patterns are leading to lower weekday evening footfall, with potential implications for retail.



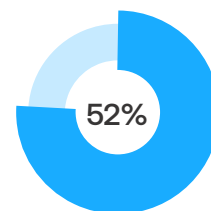
Improved physical well-being



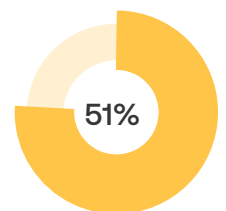
Improved Mental well-being



Better work-life balance



Cost savings



Increased flexibility

# Commuting

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

	Q1 2023	Q1 2024	Q1 2025
<b>Monday</b>	71%	67%	70%
<b>Tuesday</b>	71%	68%	72%
<b>Wednesday</b>	78%	71%	77%
<b>Thursday</b>	71%	68%	70%
<b>Friday</b>	62%	57%	58%
<b>Saturday</b>	16%	19%	17%
<b>Sunday</b>	14%	12%	10%

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

	Q1 2023	Q1 2024	Q1 2025
Yes - five days per week or more	NA	32%	27%
Yes - four days per week	NA	11%	18%
Yes - three days per week	NA	20%	25%
Yes - two days per week	NA	15%	12%
Yes - one day per week	NA	6%	3%
No - but we are thinking about it	NA	5%	4%
No - we are happy for employees to choose whether they work in the office or remotely	NA	10%	10%
No - our team is entirely remote	NA	2%	1%
<b>Total - some mandate</b>	NA	<b>83%</b>	<b>85%</b>
<b>Total - mandate 3 days or more</b>	NA	<b>65%</b>	<b>70%</b>

# Shopping

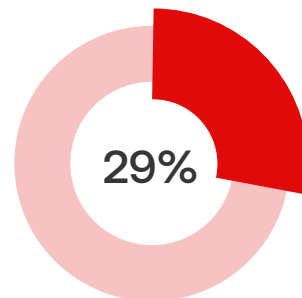
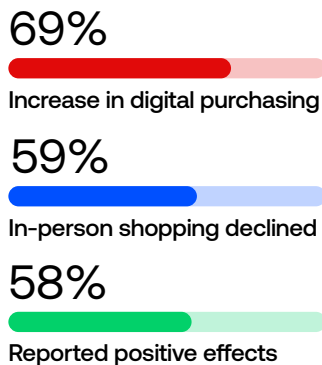
O2 Motion data shows daytime trips to retail areas have fallen by 8% the first few months of this year compared to 2024, suggesting physical retail continues to be affected by cost-of-living pressures and on-line shopping.

In the past three months, 66% of businesses have reported noticeable shifts in shopping behaviour. Consumers are spending more time shopping online and using mobile apps, with 69% indicating an increase in digital purchasing, while 59% say that in-person shopping has declined. Most businesses (58%) view these changes positively, although 27% report negative effects.

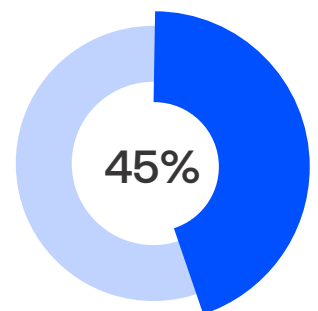
Technology plays an increasing role in shopping experiences, with 29% of consumers frequently using digital tools to enhance in-store visits, rising to 45% among younger shoppers aged 18-24. The most desired retail technology is self-service checkouts, favoured by 28% of shoppers, though 32% also find them frustrating to use. Catering to younger shoppers could be a wise move given 18-24 year olds increased their trips to retail areas by 8% compared to Q1 2024, an increase equivalent to the overall fall in trips to retail areas across all ages.

66%

Business reported shifts in shopping behaviour



Consumers frequently using digital tools



18-24 year olds frequently using digital tools

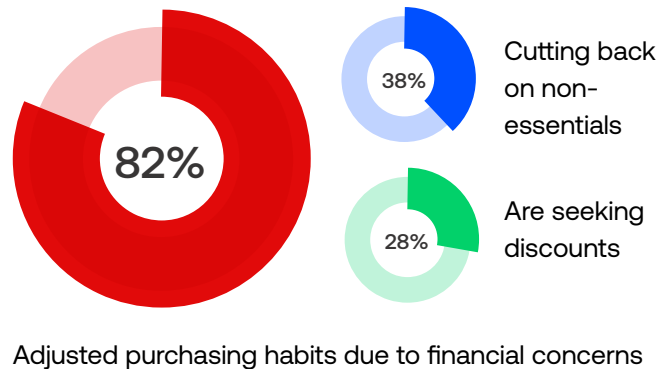
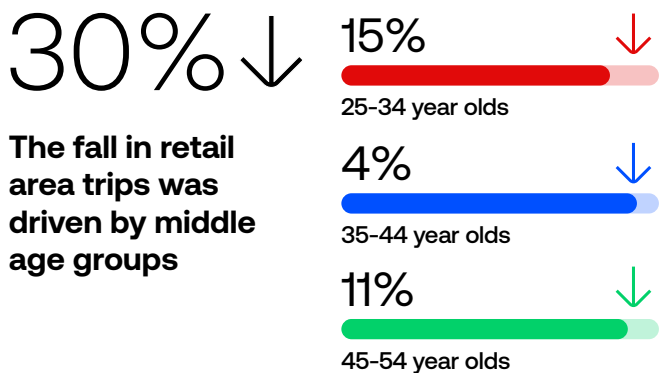


# Shopping

The fall in retail area trips was driven by middle age groups with drops of 15% (25-34 year olds), 4% (35-44 year olds) and 11% (45-54 year olds). These groups' spending habits may have evolved, with 82% of survey respondents adjusting their purchasing behaviours due to financial concerns. Among these adjustments, 38% have cut back on non-essential purchases, 38% have become more budget-conscious, and 28% are seeking out discounts. The driving factors behind these changes include rising costs (55%) and the desire to save money (38%), which may be affecting middle age groups more.

Looking ahead, 25% of people plan to prioritise spending on holidays and trips, followed by wellness and self-care (18%). However, 45% expect their spending to decrease in the coming months, a figure that rises to 61% among 18-24-year-olds. Many cite affordability concerns (35%) and a desire to reduce unnecessary purchases (41%) as key reasons for adjusting their budgets.

Despite these challenges, consumers demonstrate strong support for local businesses, stating that they would pay an average of 36% more for the same item to support shops on their high street. This is reflected by trips to high street areas performing better than those shopping centre areas (5% decrease vs 12% decrease in Q1 2025 compared to Q1 2024). Businesses have responded by embracing new technologies, with 39% implementing contactless payments, 31% introducing digital wallets and loyalty programmes, and 30% adopting mobile shopping apps in the past three months. These changes may help attract younger shoppers, who's increased mobility overall is showing up through a 12% increase in weekend trips to high-street areas.





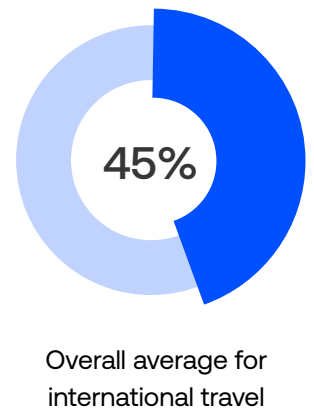
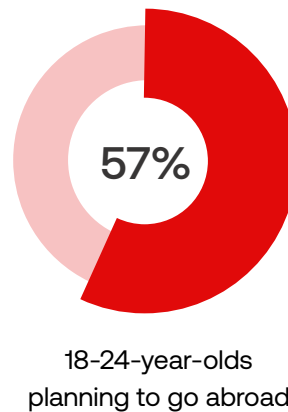
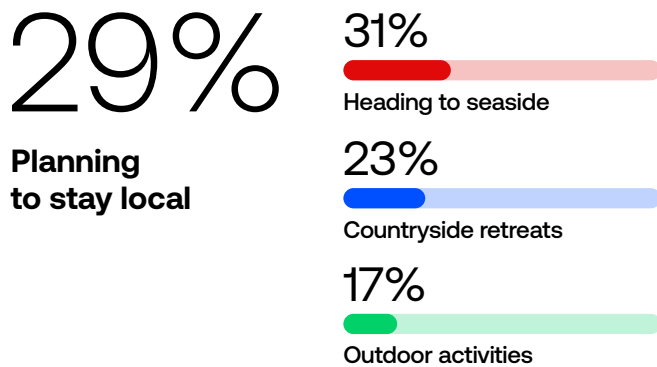
# Travel

Businesses are preparing for the upcoming May bank holidays, with 55% anticipating operational changes. Among these adaptations, 39% plan to offer special discounts, 38% will adjust work hours, and 35% will organise events or activities to attract customers. A similar percentage (35%) intend to enhance customer support during this period.

Holiday plans are varied, with 29% planning to stay local, 31% heading to the seaside, and 23% opting for countryside retreats. However, 34% of workers do not anticipate making any special plans for the bank holidays. For those who do intend to make the most of the days off, 17% are planning outdoor activities such as walking and picnicking, while another 17% expect to relax indoors.

Looking at broader travel trends shaping 2025, 69% of people plan to take a vacation. International travel is especially popular among younger people, with 57% of 18-24-year-olds planning to go abroad, compared to the overall average of 45%. The most common international destinations include Spain (30%), France (15%), and Greece (15%).

Domestic travel also remains a strong choice, with 47% of Brits planning holidays within the country, favouring destinations such as Cornwall (20%), Wales (18%), and the Lake District (17%).



# Travel

	Q1 2024		Q1 2025
Country	Rank	Country	Rank
Spain	1	Spain	1
France	2	France	2
Italy	3	Italy	3
United States of America (the)	4	United States of America (the)	4
Netherlands (the)	5	Poland	5
Poland	6	Germany	6
Germany	7	Netherlands (the)	7
Portugal	8	Portugal	8
Switzerland	9	Switzerland	9
United Arab Emirates (the)	10	United Arab Emirates (the)	10

# Methodology

O<sub>2</sub> 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<sub>2</sub> represents 35% of the UK’s population. Through the use of advanced methodologies, O<sub>2</sub> 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<sub>2</sub> 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 28/03/2025 – 31/03/2025. 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](mailto:polling@strandpartners.com).



Business