Business

Movers Index Report

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

Q2 2025 Edition

Contents

Foreword

2025 trends becoming clear

Halfway through the year, we've reached an exciting juncture where trends that are shaping 2025 are becoming clear.

In our Q2 Movers Index, we're sharing a deeper look into the latest figures to unpick the reasons behind the shifts we're seeing in how Brits are commuting, shopping, and travelling.

Our dedicated team of experts work to anonymise and aggregate data from our O2 mobile network, based on thousands of connectivity events that happen every day. This is then combined with polling from 2,000 businesses and 2,000 consumers, to create a reliable glimpse into the UK's movement trends.

From daily commutes to high street purchases and summer holiday intentions, our findings reflect how workers and shoppers are navigating cost-of-living pressures, digital innovation, and seasonal habits. This quarter, we've seen continued momentum behind return-to-office mandates, sparking increased commuting and shifting hybrid working choices. Retail continues its digital shift, especially among younger consumers, yet local loyalty and in-store experiences remain important to many shoppers. Meanwhile, travel aspirations are holding strong, with domestic and overseas getaways booked for the summer.

Whether you're a retailer looking to understand changing shopper preferences, an employer reimagining how teams work together, or curious individual, these insights offer glimpse into the trends of 2025. We hope you enjoy diving into our latest findings.

Jessica O'Connor
Product Director
Virgin Media O2 Business

Commuting

The office is back and bustling.

78% of office-based companies now require employees to attend the office at least 3 times per week, while 32% have mandated 5 days per week. Over the next 3 months, 63% of employers plan to increase their required number of office days.

Monday is the most commonly mandated day for office attendance at 71%, while Friday is the least at 55%.

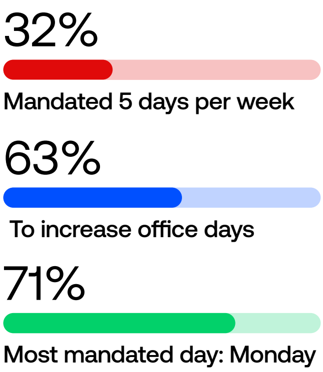
The primary reasons cited by businesses for enforcing office attendance include improving productivity and performance, reported by 57%, and boosting team morale, noted by 49%. Workers themselves cite similar motivations, with 43% saying in-office work helps productivity and team connection.

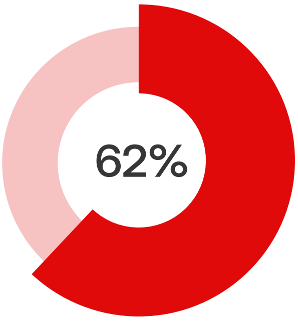
Workers are largely supportive of this shift. A majority, 53%, report preferring to work in the office over working remotely, and 62% support their companies' return-to-office mandates. While 79% of employees would like to work in the office at least three times a week, a notable 33% favour working in-office every day.

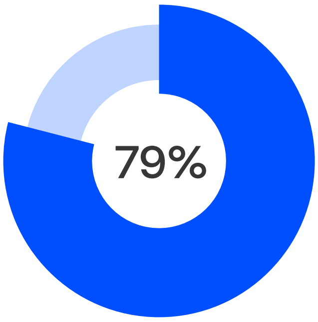
78%

of office-based companies

require employees to attend office at least 3x per week







Commuting

Increase in days in the office

Following an increase in commute trips in Q1 2025 from last year, a continuation of increased days in the office leading to an increase in commuting was expected. In the past 3 months, 88% of workers commuted at least once a week, and 36% commuted 5 days a week or more. However, mobile data shows that there has been a 3% decrease in weekday morning trips to major towns in Q2 compared to the same time last year. June 2025 was the UK's second warmest June on record, and the hot weather may have kept people away from offices.

The fall in commuting trips was greatest among the 25-34 year-olds, which had a 10% drop in weekday morning trips to major towns. Conversely, Gen Z (18-24 year-olds) increased trips by 8% compared to Q2 last year, the only age group to do so. Across weekend and weekday trips this younger age group is appearing more mobile, while other age groups have reduced their morning peak trips, perhaps in response to the hot weather.

88%

commuted at least once a week

36%

5 days a week or more.

3% ↓

Weekday morning trips

8% ↑

Gen Z increased trips

Working patterns are evolving

Despite the fall of 3% in weekday morning trips year-on-year, three towns buck this trend: Stoke-on-Trent (2%), Southend-on-Sea (2%) and Reading (1%) which all showed growth in Q2 compared to last year. Wednesday is now the peak commute day, with 74% of employees travelling into work, while only- 40% do so regularly on Fridays. Additionally, 38% of workers spend more than one hour commuting each day.

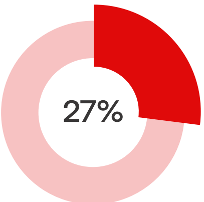
In the past month, how often have you commuted to work in a typical week?

	Q2 2024	Q1 2025	Q2 2025
Daily	45%	38%	36%
Four times a week	17%	19%	18%
Three times a week	15%	19%	21%
Twice a week	9%	9%	8%
Once a week	4%	3%	4%
Only occasionally – less than once a week	4%	4%	5%
Never	7%	8%	7%
Total - three times a week or more	77%	76%	75%

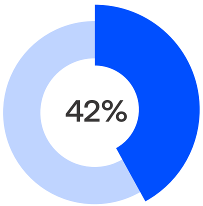
Commuting

Hybrid patterns are evolving

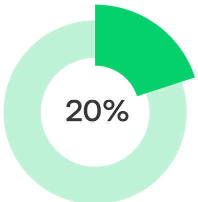
Hybrid working patterns are also evolving. 27% of employees report leaving the office at lunchtime to finish the workday from home more frequently—especially on Fridays, when 42% do so, compared to only 20% on Mondays. This split-day working approach has become more common, and 51% of businesses have observed it happening more often.



Leaving the office at lunchtime



On Fridays



On Mondays

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

	Q2 2024	Q1 2025	Q2 2025
Monday	65%	70%	70%
Tuesday	72%	72%	70%
Wednesday	72%	77%	74%
Thursday	68%	70%	69%
Friday	59%	58%	61%
Saturday	20%	17%	17%
Sunday	12%	10%	10%

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

	Q2 2024	Q1 2025	Q2 2025
Yes - five days per week or more	32%	27%	32%
Yes - four days per week	14%	18%	21%
Yes - three days per week	17%	25%	25%
Yes - two days per week	13%	12%	9%
Yes - one day per week	4%	3%	2%
No - but we are thinking about it	3%	4%	3%
No - we are happy for employees to choose whether they work in the office or remotely	10%	10%	7%
No - our team is entirely remote	1%	1%	1%
Total - some mandate	86%	85%	89%
Total - mandate 3 days or more	70%	70%	78%

Shopping

Shopping behaviour continues to evolve in response to economic pressures and digital innovation. Weekend trips to retail areas in Q2 fell by 1% compared to last year. Both high-streets and shopping centres have experienced a small drop in trips from last year.

However, looking at more recent trends through spring and summer, weekend trips to shopping centres and highstreets are remaining stable. A large rise in trips in February to March 2025 (+8%) has been matched by small decreases in April, May and June leading to slightly higher trips in Q2 compared to Q1, with highstreets (+4%) performing slightly better than shopping centres (+2%).

Nearly half of shoppers, 48%, have used technology to improve their in-store experience in the past 3 months, and this rises sharply to 75% among 18-to-24 year-olds.

As cost-of-living concerns remain high, 38% of consumers report cutting back on non-essential purchases, while 41% say they're more budget-conscious and 30% have increasingly looked for discounts and sale items.

48%

used technology to improve their in-store experience

38%

Cutting back

41%

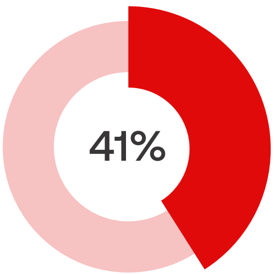
More budget-conscious

30%

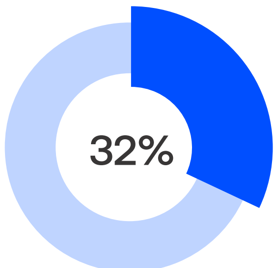
Looked for discounts

Despite the growth of online shopping platforms, support for the local high street remains strong. Over half of UK consumers, 55%, consider supporting local businesses when making purchasing decisions. On average, shoppers are also willing to pay 35% more for an item to support a local retailer.

Younger consumers are significantly more likely to shop through online apps. In the past 3 months, 41% of those aged 18 to 24 used Shein frequently, and 32% shopped on Instagram. This is compared to just 3% and 4% respectively among those aged 65 and older. Despite this, 18-24 year-olds were the only age group to show an increase in the number of weekend trips to retail areas, rising 12% in Q2 compared to last year.



Of those aged 18 to 24 used Shein frequently



Shopped on Instagram

Shopping

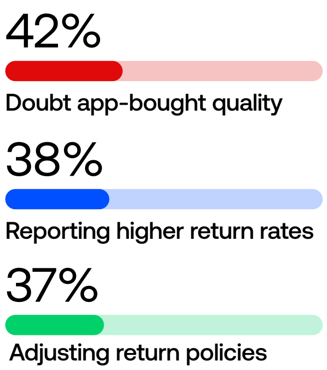
56% of UK consumers still prefer shopping in-person, believing it gives them greater confidence in product quality. Meanwhile, 42% doubt the quality of app-bought goods to those bought on the high street.

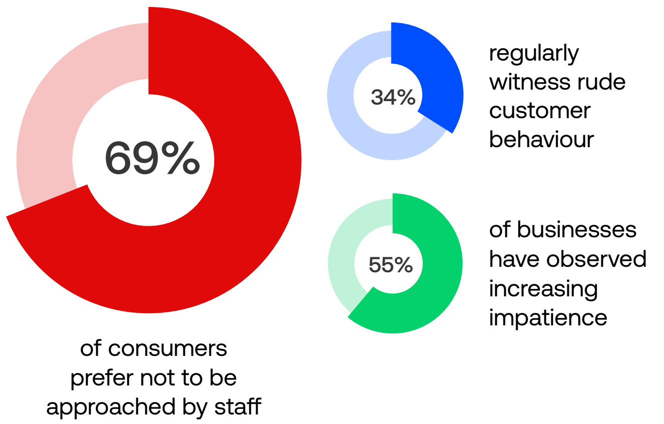
Return culture is also shifting rapidly, particularly among younger Brits. About 1 in 4, 26%, of 18-to-24 year-olds expect to buy clothing items, wear them once, and return them. This trend is already impacting businesses, with 38% reporting higher return rates and 37% adjusting their return policies accordingly.

In-store customer etiquette also reflects mounting tension, as 69% of consumers prefer not to be approached by staff while browsing. 1 in 3 Brits, 34% regularly witness rude customer behaviour, and nearly half of retailers, 49%, say they face aggression from shoppers at least weekly. Furthermore, 55% of businesses have observed increasing impatience among consumers in recent months.

56%

Prefer shopping in-person





In the past 3 months, have you found yourself changing your spending in any of the following ways?

	Q2 2024	Q1 2025	Q2 2025
I am more budget-conscious when shopping	33%	38%	41%
I've cut back on non-essential purchases	43%	38%	38%
Bought more items on sale or discount	35%	28%	30%
I've switched to cheaper brands	38%	27%	28%
I'm using coupons and discounts more frequently	19%	25%	25%
I'm buying in bulk to save money	14%	20%	21%

Shopping

How important is supporting your local high street to you when making purchasing decisions?

	Q1 2025	Q2 2025
Very important	19%	19%
Somewhat important	37%	26%
Neutral	30%	29%
Somewhat unimportant	8%	8%
Very unimportant	5%	6%
Don't know	2%	2%

Retail Business Decisions: Below is a list of retail technologies some retailers are using. What technology are you currently using in stores?

	Q2 2024	Q1 2025	Q2 2025
Mobile apps for shopping and purchasing items	57%	30%	39%
Contactless payment systems	58%	39%	39%
QR codes	37%	28%	34%
Virtual and augmented reality	19%	16%	19%
Social media platforms	45%	35%	41%
In-store interactive displays and kiosks	19%	18%	25%
Personalised online recommendations	23%	26%	31%
Subscription services	18%	21%	28%
Mobile self-checkout systems	20%	22%	28%
Digital wallets	25%	31%	34%
Chatbots / virtual assistants	16%	26%	32%

Travel

Heading into the summer of 2025, there's a strong intent to travel from Brits, with 65% planning a holiday this year.

Domestic destinations such as Wales (18%) and Cornwall (16%) remain popular, while Spain takes the lead for international getaways at 23%, followed by the United States at 17%. While Spain remains the number one travel destination for Brits, trips numbers were down for 5 out of the first 6 months of the year compared to 2024. Overall, trips in the first half of the year to Spain are 3% lower than in 2024. Similarly, for the USA trips are 5% lower than 2024. In fact, so far this year trips to the top 60 destinations globally are 3% lower than in 2025, indicating a slow-down in international travel.

Nevertheless, concerns about unpredictable UK summer weather continue to drive demand for overseas holidays, with 40% of consumers citing this as a major reason for travelling abroad. Moreover, 36% of Brits say they'd consider booking a last-minute trip to a sunny destination if UK weather becomes poor. Spain and Greece are the top choices for these spontaneous getaways, selected by 38% and 25% of consumers respectively.

This is supported by a 2% increase in trips to European countries in the first half of the year. Trending destinations include Georgia (+139%), Bosnia and Herzegovina (+30%) and Estonia (+23%), which ranked top three for trip growth in 2025. Estonia is in fact the only country to have more trips in every month this year compared to 2024. Based on these numbers Balkan and Eastern European destinations are the ones to watch for summer 2025.

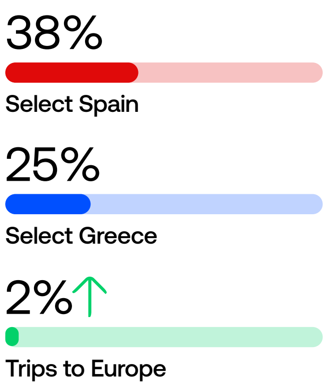
Globally, Tunisia (+49%) and Sri Lanka (+37%) are the top growth destinations in 2025 so far.

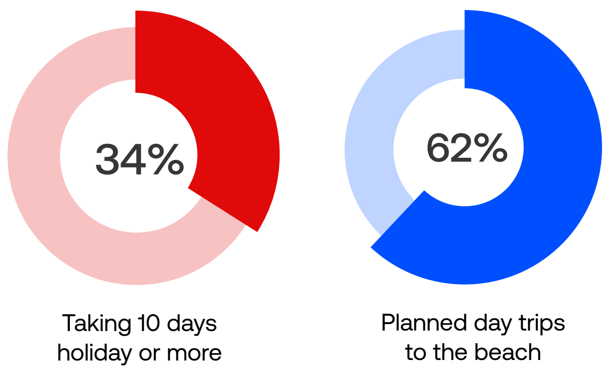
To get these trips in, British workers plan to take an average of 7 days annual leave this summer, with 34% taking 10 days or more.

Summer lifestyle choices reflect a strong preference for low-cost leisure activities. 62% of Brits have planned day trips to the beach or countryside, while 71% would rather relax in a park or garden than visit pubs or bars, which appeals to just 53%.

40%

Cite unpredictable UK weather as major reason to travel abroad





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. 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.