



Commuter Census[®] 2023



- Key insights from 7,500 UK commuters
- Understand current UK commute modes and trends
- Learn about commuter sentiment & modal shift in post-pandemic recovery

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Commuter Census 2023 data was collected in March and April 2023. In total there were 7,439 responses. Not all questions were mandatory and where we have used percentages in this report these are based on the total number of responses to that individual question. Percentages quoted have been rounded to the nearest whole percentage point.

The Mobilityways Travel Survey module was used to conduct the Commuter Census. Invites to complete the Commuter Census were sent by email to members of the Mobilityways free public Liftshare.com car sharing community.

Quotations from named individuals have been taken from public statements and do not indicate an endorsement for any product or service.

Version 1.1

www.mobilityways.com

Foreword



Julie Furnell

Managing Director, Mobilityways

Our annual commuter census matters to me because it's not just about the numbers; the data we receive helps us to understand what drives us as all as individuals. In this rapidly changing world, where the cost of living continues to rise, the choices we make about how we commute can have profound implications for our financial and personal wellbeing.

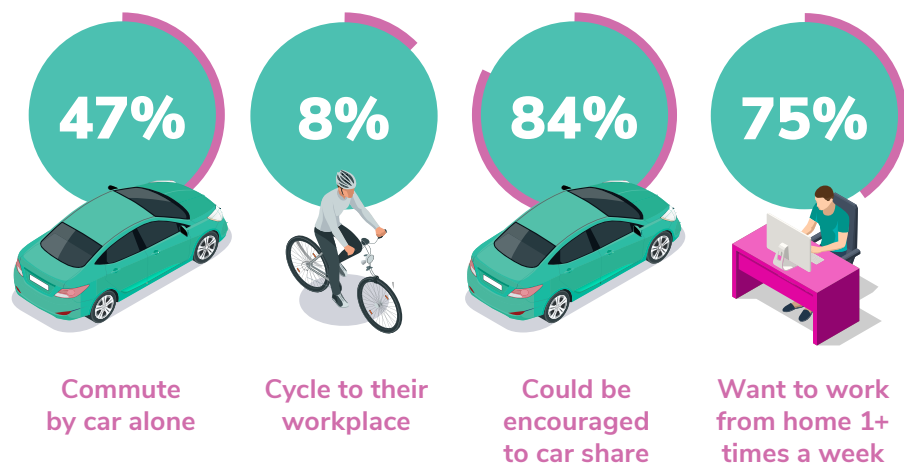
This census is not just about identifying problems; it's here to find solutions and pave the way forward. As an organisation, we are committed to promoting sustainable commuting options that reduce the financial burden on individuals and the pressures their employers face, such as recruitment and retention. By understanding the needs and preferences of our members, we can better tailor our offerings to support and incentivise sustainable commuting choices.

As you'll see, the signs are good. Single-occupancy commutes by car have sadly barely decreased, but the public appetite for change has. Now more than ever, people want to choose a more eco-friendly commute - we need to help make this feasible.

As we share this thought-provoking data with you, and continue this journey of discovery, analysis and transformation, we extend our gratitude to our members for their invaluable contributions to this commuter census. Your voices are the compass guiding us towards a brighter, more sustainable future. Together we will chart a path that leaves a lasting legacy of positive change, and make zero carbon commuting a reality.

Executive Briefing

Analysing the responses of **7,439 individual commuters** has shown that, as more people travel to work again, they're choosing more sustainable modes. While driving alone is still easily the most common mode of travel, the vast majority of respondents are ready and willing to change their behaviour and leave the car behind.

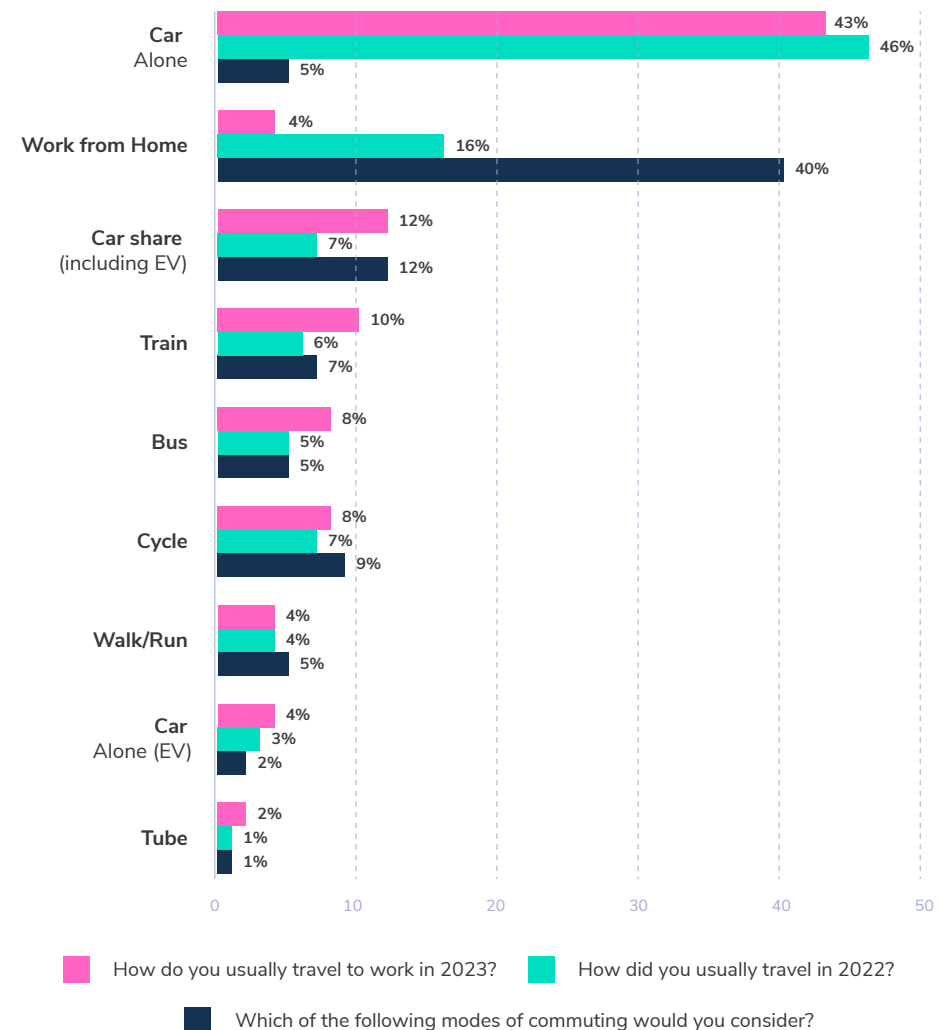


The data we have gathered in this year's Commuter Census shows that there has been a shift towards more days back in the workplace, with fewer people working from home. Just 4% of respondents now say they usually work from home, down from 16% in 2022, leading to a fascinating change in habits and opinions as people return to working on-site more of the time.

Car usage levels remain high - if you include EVs, there's only a 2% year-on-year drop in driving to work alone. More promising, however, is the rise in usage for all modes of sustainable transport. The largest rise is in car-sharing, which has gone up by 5% since 2022. Plus, just 16% of respondents said they could not be encouraged to car share at all. Commuters may be beginning to put the environment first but they need the right resources at their disposal, as indicated by the increase in respondents who named availability as the biggest factor for their current choice of transport.

The UK Government announced its 'Commuter Zero' policy as part of the Transport Decarbonisation Plan in July 2021, but as yet this hasn't had a large impact on sustainable trips to work. The Commuter Census 2023 shows that the willingness from commuters is there: Now they need the support – in the form of work-from-home and car-sharing policies, and better public transport infrastructure.

Modal Shift 2022 to 2023



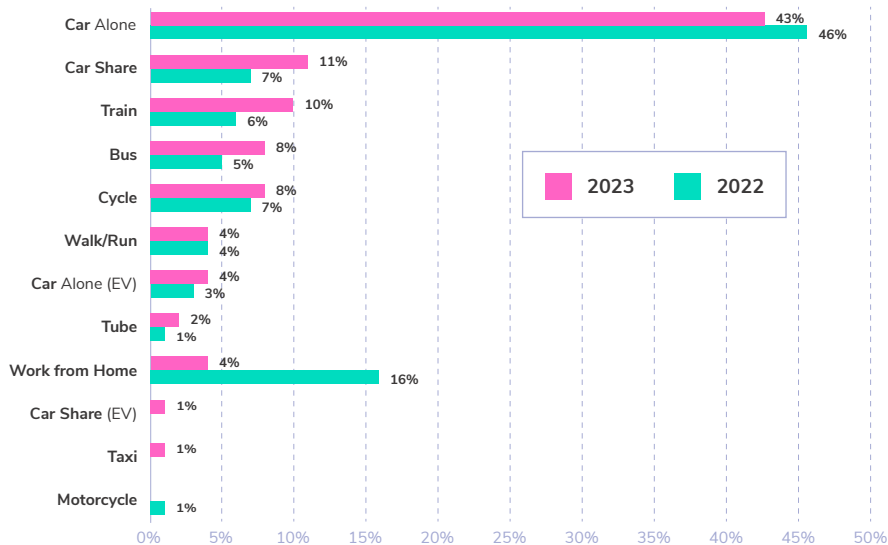
Mode of travel

By far the most common mode of travel is commuting by single-occupancy vehicle (SOV), but the dial is now beginning to shift.

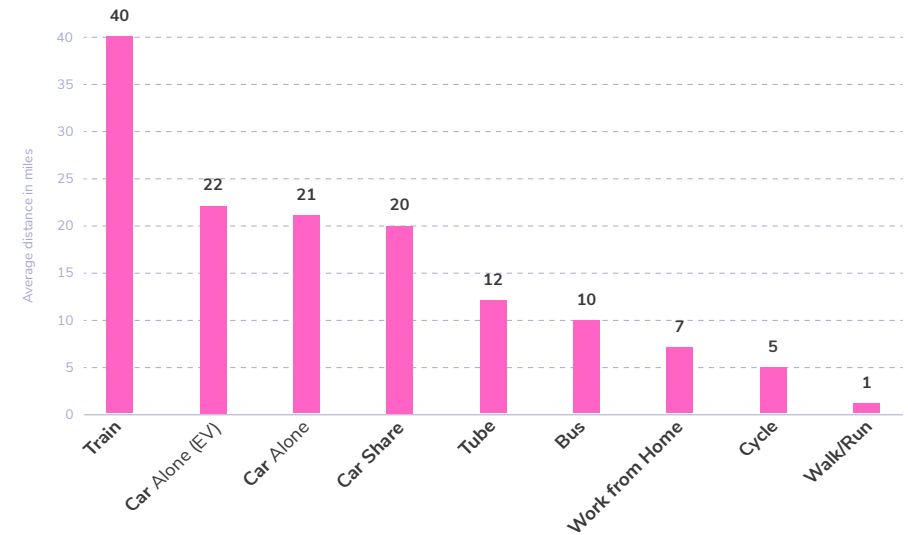
The SOV still dominates the mobility landscape, but 43% of respondents now drive to work in a diesel or petrol car alone, compared to 46% in 2022. The number of single-occupancy EV commuters has very gradually increased, from 3% to 4%, which is in line with the general rise in usage of EVs nationwide.

Solo drivers of cars, vans and EVs combined made up 47% of all commuters in 2023. This is actually an increase from the single-occupancy commute levels recorded in the Government's 2021 Census, which saw 45.1% of commuters driving to work in a car or van. It's clear that the car remains a primary method of transport, but there are signs of car usage changing, as car-share numbers have risen from 7% of commuters in 2022 to 12% this year (including car share EV).

How do you usually travel to work?



Average One-Way Distance in Miles



The most significant change was in usually working from home – which dropped substantially, from 16% to just 4% of respondents. This naturally indicates that more people are commuting more days a week than in 2022, as mirrored in our analysis on flexible commuters that follows.

It appears that people may be returning to the office more sustainably, however, as almost all modes of transport other than SOV rose year on year. As well as car-sharing, cycling and train, bus, tube, metro and tram use have all increased in the last 12 months.

This year's Commuter Census again revealed a clear link between commuting distances and mode of transport, with no real changes from last year.

There is no significant difference between the distance travelled by commuters driving alone or those choosing to share. This continues to highlight that there is no geographical barrier to car-sharing – it has latent potential to reduce the number of vehicles on our roads.

The distances travelled by public transport vary massively by mode, with buses mainly used for journeys around 10 miles. Trains are favoured for the longest journeys, with the average length of 40 miles being 1.9 times further than the average commute by car.

Flexible Commuters

In April 2020, during the height of the COVID-19 pandemic, 46.6% of employees did some work at home (Office for National Statistics). Last year our data showed that more people were working from home at least some of the time, but now the figure is decreasing. In the Commuter Census 2023, 81% of respondents said they commute to the office twice a week or more, while last year that figure was only 69%.

As home working continues to trend down, however, the desire for it remains as strong as ever. In 2022, 15% of people said their preference was to commute 0 days a week, while in 2023 this increased to 25%. Plus, of the 27% of people commuting 5 days a week, only half want to work in the office that much. There's still only been a very minor shift in full-time office work with a 3% increase from 12 months ago.

With such a small change in full-time office work over the course of the last year, it appears the new normal has been established: No longer can companies claim they're still figuring out their post-pandemic plans. Hybrid working is now the most popular policy – with 64% of respondents this year working in a hybrid arrangement, compared to 59% last year. Our data shows that 84% of employees would still rather not commute every day, three years on from the peak of full-time remote working.

Should employers be concerned by these figures? They certainly need to be wary that the gap between the desired amount of home working and a dissatisfying reality will literally drive people away.

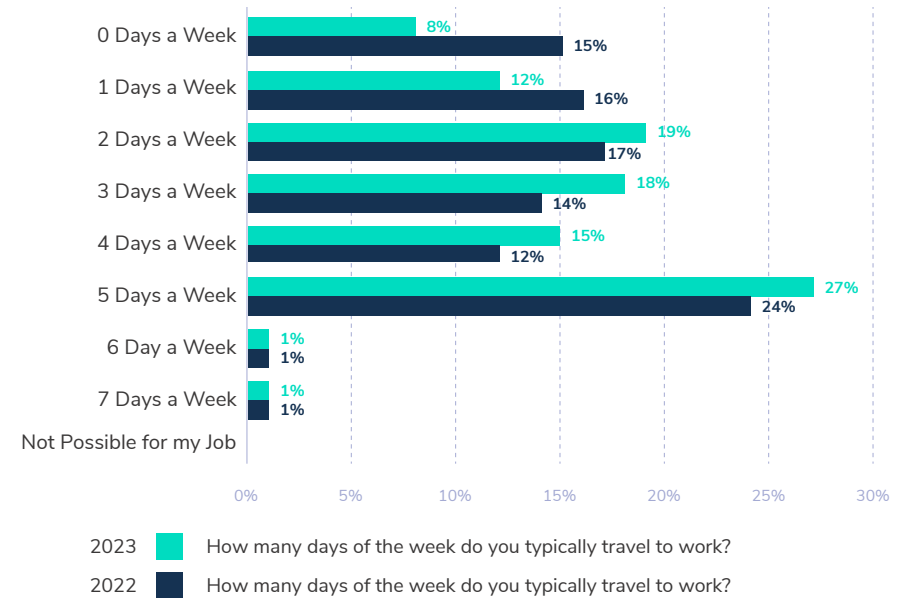


Working from home is convenient but we are being pressured to go in the office more. I car share as it's cheaper than going on the train and the bus takes a longer time.

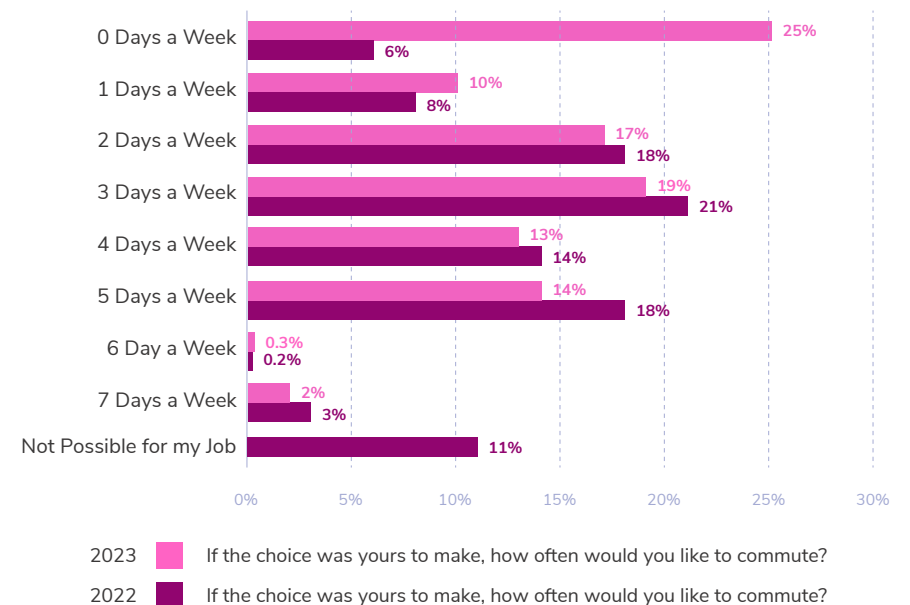
Lesley-Anne | Stowmarket



Hybrid Working Reality Year on Year



Hybrid Working Desire Year on Year



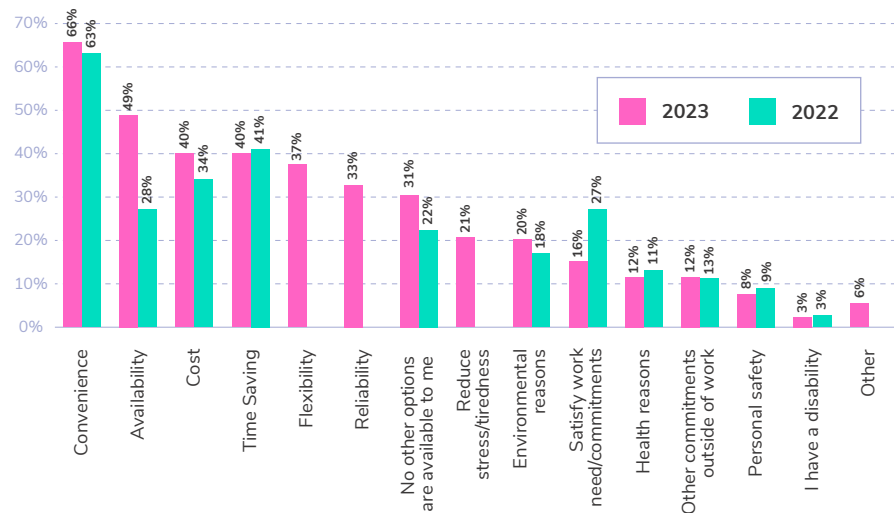
Commute Preferences

The Commuter Census 2023 has revealed a fascinating shift in the reasons commuters give for how they travel. While “convenience” remains the largest factor, and has risen slightly from 63% in 2022 to 66% this year, the number of people citing “availability” has almost doubled year on year, putting it firmly as the second biggest reason. 49% of respondents said availability was a factor this year, compared to just 28% in 2022. This is mirrored by a 9% increase in the number of people answering the even firmer: “No other options are available to me”.

This suggests that many more people are being held back by issues outside their control – although the number of people still pointing to convenience as a cause for their commuting choice displays the same inertia as last year.

However, fewer people are now choosing their main mode of travel because of work need / commitments – falling from 27% in 2022 to 16% this year.

Why do you use this mode of travel?



“ With travel, it’s more about promoting other options to try and influence behaviour change, to try and encourage those more sustainable behaviours. That might look like improving showering facilities so that when you do cycle in it’s a more positive experience and there’s less friction in that process.

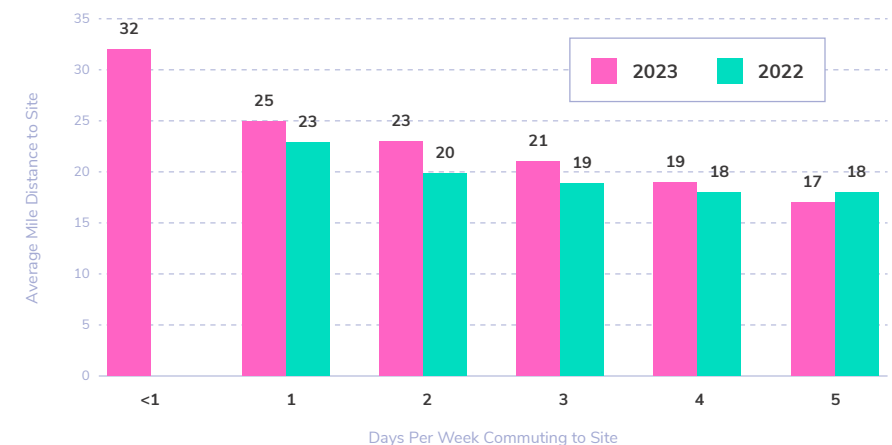
Ned Maynard | Head of Sustainability, NHS University Hospitals Bristol

This indicates that more employers are showing flexibility in office working days or hours to fit around transport availability – a change in attitude that may reflect the greater shift towards hybrid working.

There is a correlation between how far commuters live from their workplace and the number of days those commuting by SOV travel to work.

The Commuter Census revealed SOV commuters travelling to the office five days a week live an average distance of 17 miles away. This is 32% and 27% less than those who commute one and two days a week respectively - and almost half the distance of those who go to work less than once weekly. This indicates a clear negative correlation between length of journey and frequency of commute, with people clearly travelling to the office less the greater the distance. This may be because organisations that ask people to commute less are able to attract more employees from further away.

Average one way commute in miles for single occupancy car commute - by how many days of the week the worker commutes to site



Which of the following would you consider as an alternative to your current mode of commuting?

55%
Car share
(including EV)

44%
Work from
Home

36%
Bus
(including EV)

28%
Active Travel

19%
Train



I would consider getting the bus if there was a direct route to work. We are hoping to put in a Working From Home schedule for our team, so hopefully that will make things easier.

Katherine | Southampton



The Government needs to invest and support heavily in Infrastructure i.e. coach and rail to support and encourage people to leave their cars and actively seek alternate forms of transport. Penalising people with Low Emission zone fines, without alternative solutions is frustratingly short sighted.

Mark | Nuneaton



DID YOU KNOW?

13% of all trips in England in 2021 were for commuting purposes, with an average commuting time of 27 minutes. Most modes of travel are used for a mixture of purposes, however, in 2021, about half (51%) of all trips by rail were for either commuting or business purposes.

Taken from: Transport Statistics Great Britain's (TSGB) annual summary of statistics for cross-modal transport topics.

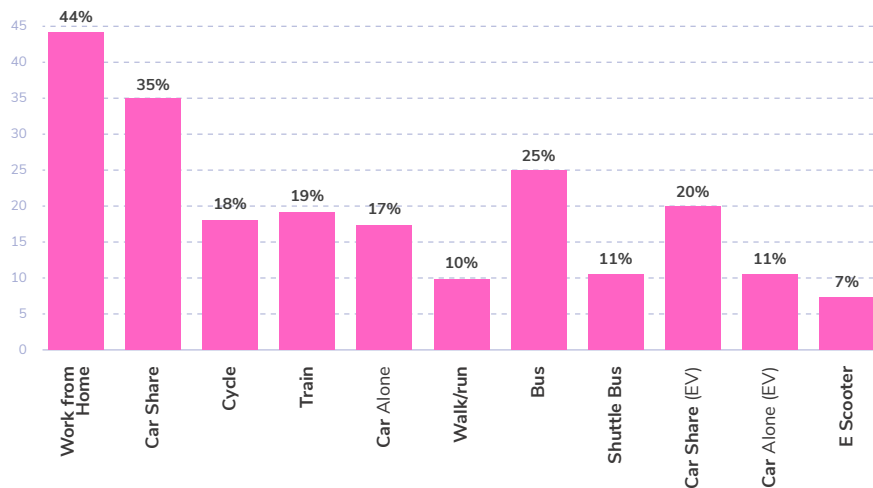
Behaviour Change

Car-sharing remains the most common commuting alternative that people would consider, and in fact the appetite for sharing has gone up considerably year on year.

Last year, 31% of respondents stated that they'd be willing to share their journey (including car share EV). In 2023 that figure continued to rise, to 55% - perhaps reflecting that people are becoming more open to sharing their vehicle, and to sustainable commute options in general.

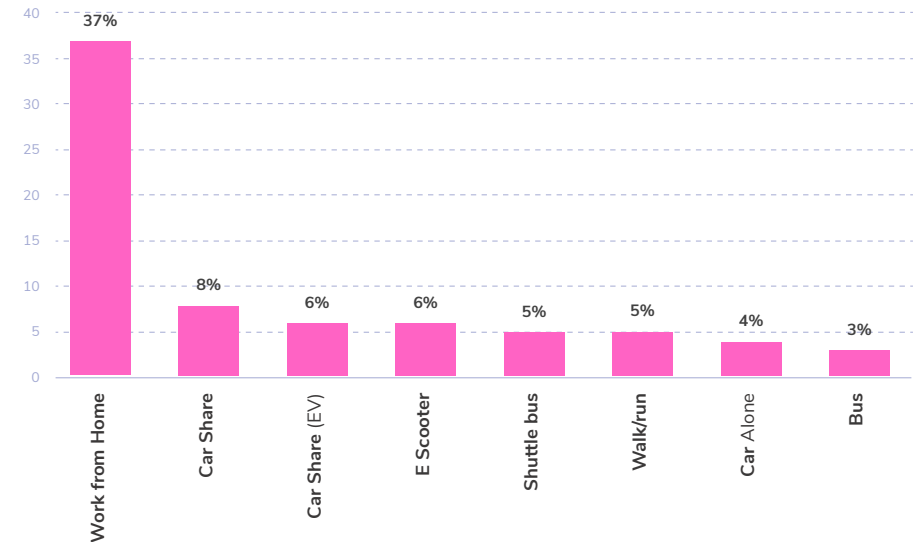
The switch back to office-based or hybrid working in the last 12 months has noticeably altered the second choice. 44% of people gave "Work from Home" as their answer, up 17% from 2022. This suggests that the appetite to work remotely is clearly higher than last year, in correlation with businesses asking their employees to work from home less.

Which alternative modes would drivers consider?



Driving alone is still less popular than lift sharing. In 2023, just 17% of respondents said they would switch to driving alone – down slightly from 18% last year. In the same vein, substantially fewer people would consider driving alone in an EV as an alternative mode of travel. From 25% in 2022, just 11% of commuters this year said they would consider using an electric car to get to work.

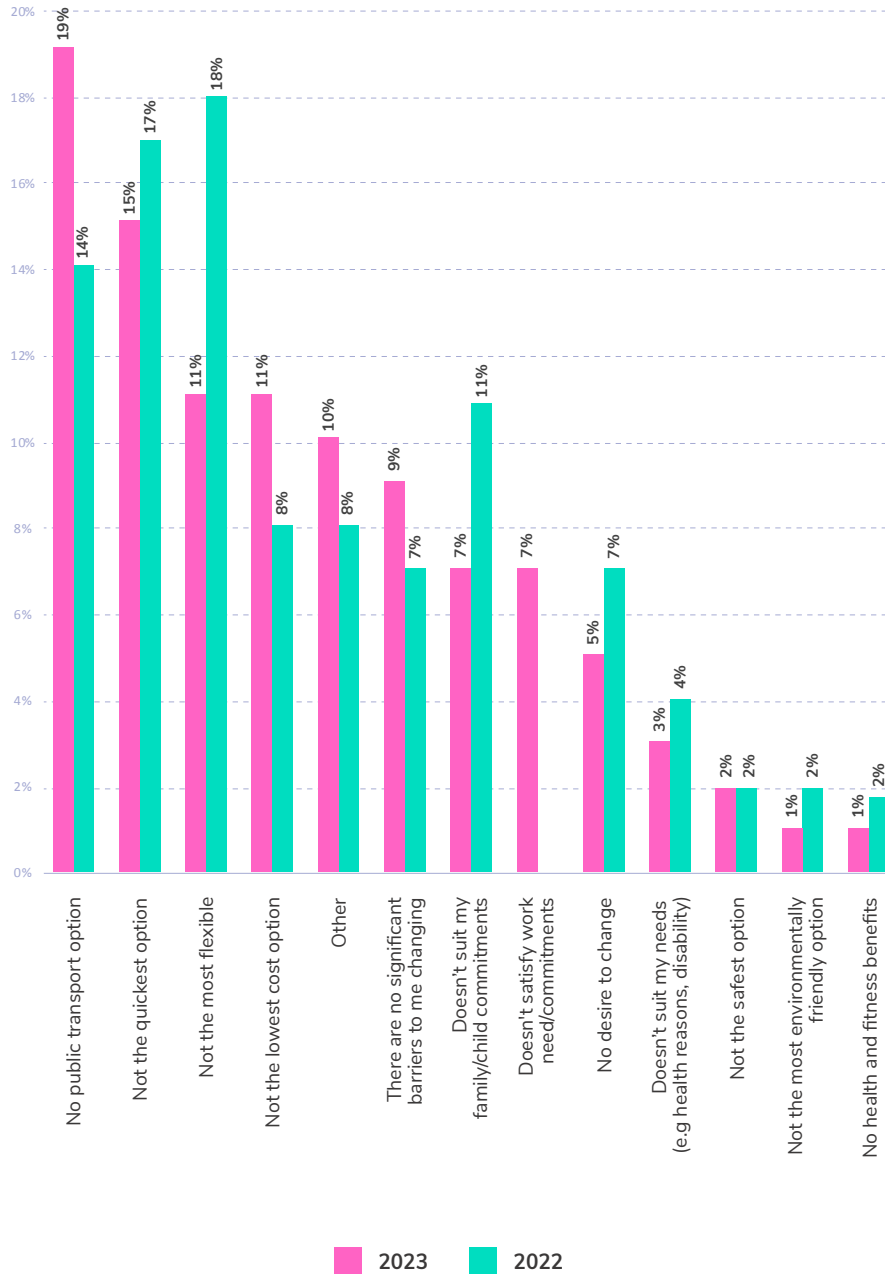
Commuters who would not consider any alternative mode



“ It feels like there's been a massive missed opportunity to push more flexible working in the workplace post covid. A commute avoided is less polluting than a commute in a different mode. Whether it's direct tax incentives or just more flexible ticketing, it feels like not enough is being done and if anything there's attempts to drag people back to the office. ”

David | Bolton

What would be the biggest barrier to you travelling differently?



This year's Census offered more hope that commuters are finally looking to move towards more sustainable solutions: 44% of respondents listed the biggest barrier to modal shift as something beyond their control: either "no public transport option", "not the lowest cost", or "doesn't suit my work/family commitments". If these barriers could be removed, a significant number of people could travel more sustainably.

When asked directly about car-sharing, only 16% of respondents said they would not consider it under any circumstances – the same as 2022. The majority of people would still most likely make the change "if they could find someone that shares their route to work", but this response has dropped significantly, from 52% to 35%. This indicates less of a barrier, and that more people are now able to find car-sharing matches.

“ Some individuals and organisations are likely to have spent time and money on skills and equipment to support the shift to remote working, which combined with the reduced costs of avoiding a commute to work, may drive motivation for individuals to continue working from home in the future.

National Infrastructure Commission Report | Behaviour change and infrastructure beyond Covid-19

The other most noticeable change is that fewer people would car share "If I could share with someone I already know" - falling from 33% in 2022 to 7%. This suggests there is now more confidence in terms of sharing with a stranger, perhaps as a result of car-sharing becoming more normalised.

Furthermore, just 5% of people said they had no desire to change their mode of commute – down from 7% last year. The remaining 95% outlined one or more blockers that prevented them from changing their travel behaviours. The vast majority of these barriers, 56% combined, were related to a lack of availability or perceived inconvenience of sustainable commute options – up from 50% in 2022. This solidifies the suggestion that more people are now willing to change their habits – but current sustainable transport services are not up to scratch; especially considering "no public transport option" was the most common single answer – up 5% from last year at 19%.

“ **Shared mobility could be a key tool in facilitating a timely and just transition to net-zero, by lowering the barriers to entry for zero-emission transport when compared with privately owned cars. Transport decarbonisation will happen faster and more fairly if everyone has access to public transport and shared mobility.**

Daniel McCool | Transport Planner | Arup

Unsurprisingly, those currently working from home were the least willing to consider alternative commuting options. In fact, even more home workers are unwilling to change this year as compared to last – 37% up from 22%.

Apart from remote workers, car sharers (21%) and walkers (20%) were least likely to consider changing their commutes last year, but in 2023 those figures have dropped to 8% and 5% respectively. There was no group of commuters where more than 15% wouldn't consider any different mode of transport, suggesting that almost every commuter is amenable to change.

Those most open to alternative modes were those using public transport, with 97% of bus users happy to consider alternatives – up from 90% in 2022. This is where some of the most negative sentiments are raised each year, with frustrations with rising costs, infrequent services and spatial inequality, with rural areas being particularly under-served by public transport – based on this data, matters have worsened rather than improved.

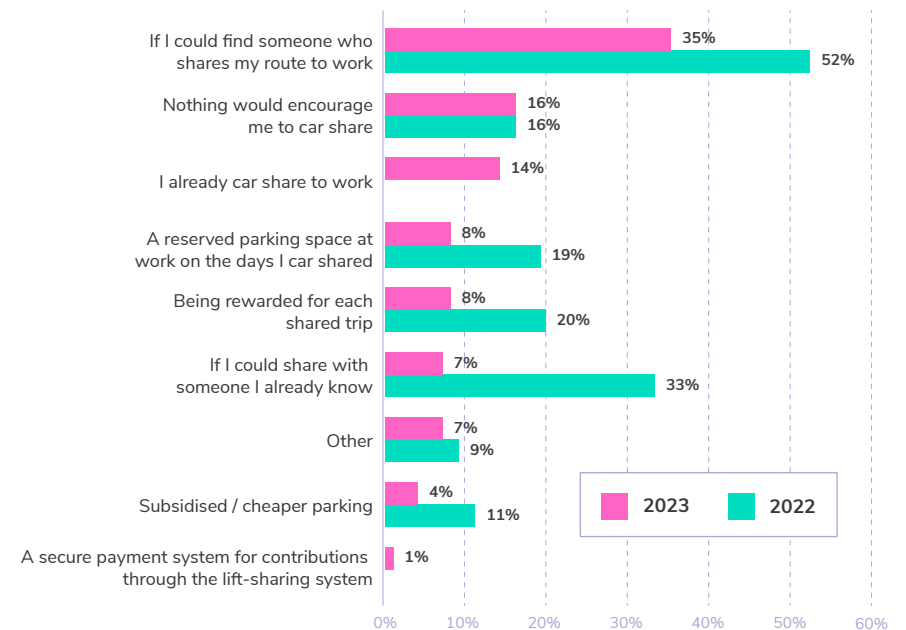
“ **I think the Liftshare scheme is excellent for someone like me who is in the middle of nowhere. However, as I am able to do my job from home it means I don't need to worry about getting to work. If I did have to travel to work I would definitely consider car sharing.**

Linda | Market Rasen

“ **The bus services are unreliable and often don't turn up or are so late that I am late for work or have to get a taxi. Reliable bus services would help remove the use of car/taxi on the road. I also prefer to walk or cycle when the weather is good, however it doesn't feel safe to do so during busy hours – I'm uncomfortable weaving with buses.**

Victoria | Cambridge

Which of the following would most encourage you to car share to work?



Where are people still working from home?

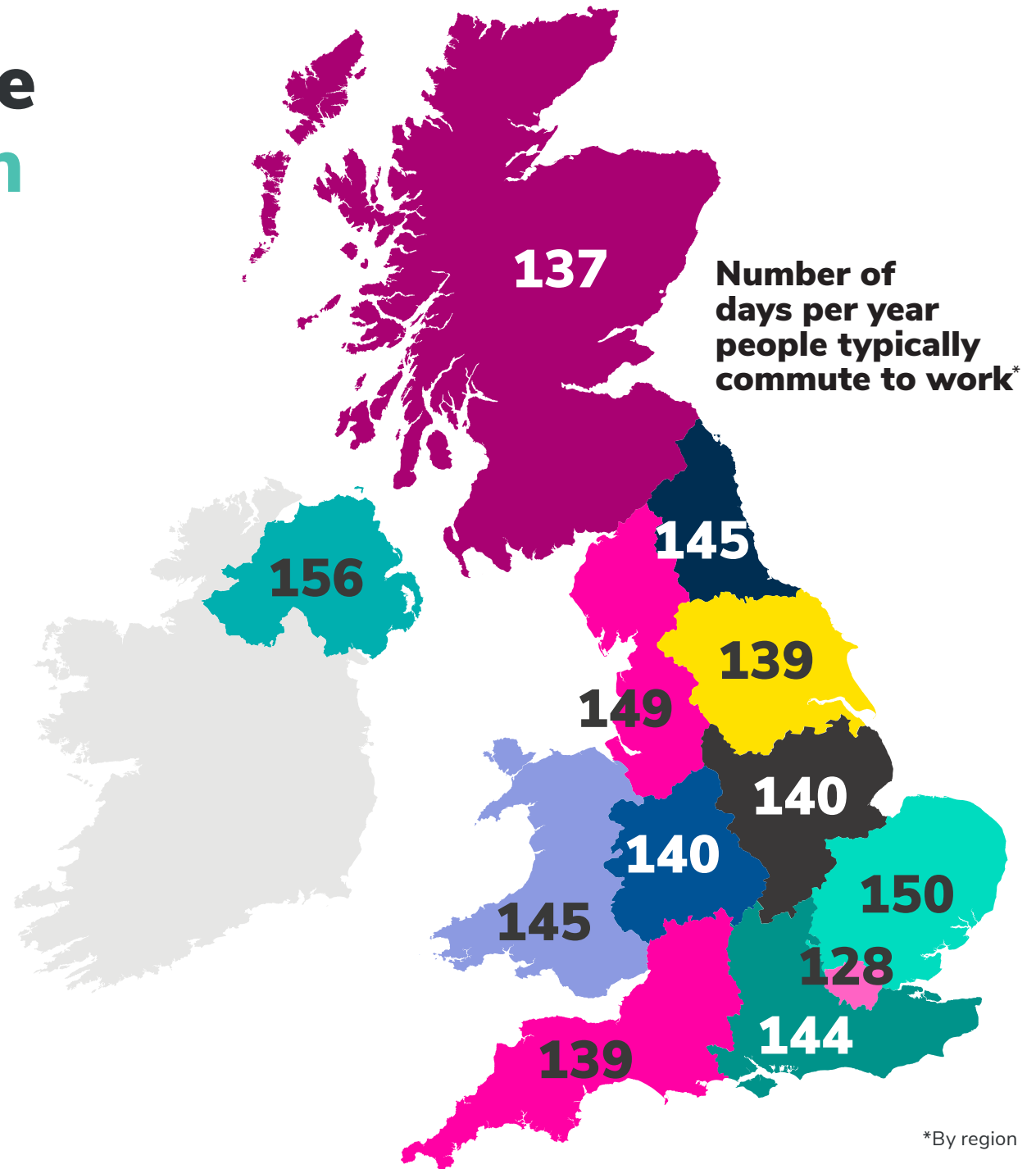
It's clear from this year's Census that employees are working from the office more, as the peak of the COVID-19 pandemic is now firmly in the rear-view mirror: 61% of us now commute at least three days a week.

It's clear, however, that hybrid work policies differ from region to region, with Londoners comfortably spending the fewest days in the office – despite travelling the most sustainably, with just 27% of workers in the capital commuting by car according to the Government's most recent Transport Statistics. At a mean of 2.8 days a week, London is the only region other than Scotland (2.98) where workers commute fewer than three days on average.

Interestingly, Londoners will travel to the office 28 times a year fewer than someone from Northern Ireland – the region with the highest level of office-based working (3.4 days a week). Over the course of a 46-week working year, this does equate to more than one extra day in the workplace every fortnight for an employee in Northern Ireland, compared to London. Elsewhere in England, the East and North West stuck out as the most likely to enforce office-based working, with 150 and 149 commuting days a year respectively.

“ The average UK employee views working from home two to three days a week as equivalent to a 6% pay raise.

Paul Mizen | Professor in Economics King's Business School King's College London



Commute distance by region

People in London travel furthest each year to work, with the average London worker commuting 7,486 miles annually – despite being in the office for the least amount of time. This is because the average commute for a Londoner is 29.3 miles, as compared to the national average of 19 miles.

This may be fairly unexpected, considering that London is obviously a much smaller area than Yorkshire or Scotland for example, but the reason is likely because of the sheer numbers of people commuting from the capital's surrounding towns and cities. Considering how few London commuters drive to work, the city is the ideal case study for how outstanding public transport infrastructure clearly increases the uptake of sustainable commuting.

Meanwhile, the North of England had the three shortest average commute distances, with the North West clocking in at 16.3 miles in each direction, and Yorkshire and the Humber totalling 15.7 miles each way. Workers in the North East of England have the shortest daily commute, at just 13.2 miles one way – less than half the 29.3 miles for those who work in London. This could be due to the vast number of towns and cities in the North of England. In contrast, the South East and East of England, which have comparatively fewer major urban hubs, made up two of the four regions with a yearly commute above the national average – along with London and Northern Ireland.

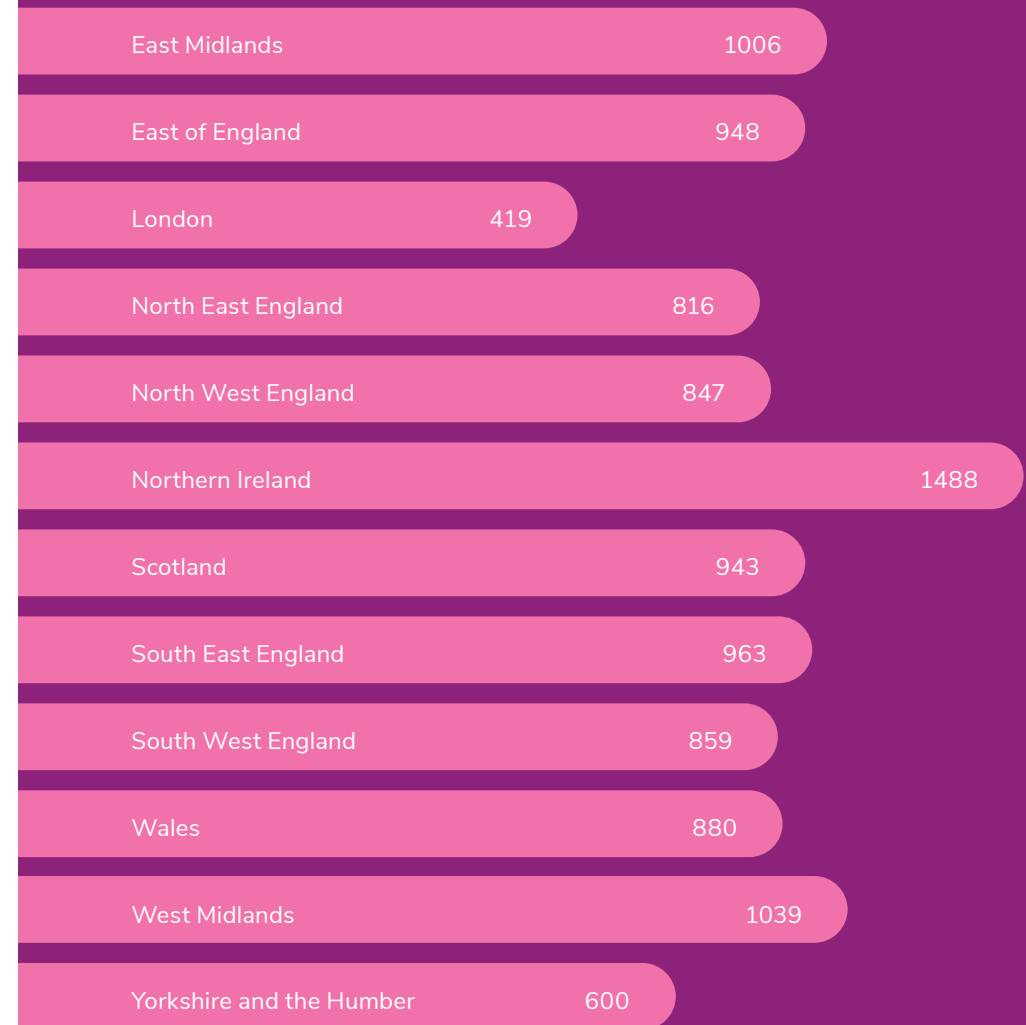


DID YOU KNOW?

According to the National Travel Survey, those living in rural areas drive around 40% more miles each year than those living in urban areas. But there are fewer petrol stations and less competition in rural areas, which means they are paying up to 6p a litre more for their petrol than their urban neighbours.

Regional ACEL

By combining the Government's latest greenhouse gas conversion factors, with the mode and distance provided for each commute, we've calculated the ACEL (Average Commuter Emissions Level) for each region. ACEL is expressed in kg of CO₂e per year per commuter.



The desire is there, but is the infrastructure?

Encouragingly, this year's Commuter Census reveals more considerable appetite for change than the same survey showed just 12 months ago.

There is still plenty of work to be done: The number of people using more sustainable methods to commute to work has slightly increased but, as discussed elsewhere in this Census, a higher percentage of people are using SOVs to get to work than two years ago – so the shift to sustainable transport needs to be more significant.

Despite “convenience” again being listed as the biggest reason for people's current commute, one of the most notable findings was that lack of “availability” as a barrier to change rose by 21% year on year - meaning the appetite to find different modes of transport is growing.

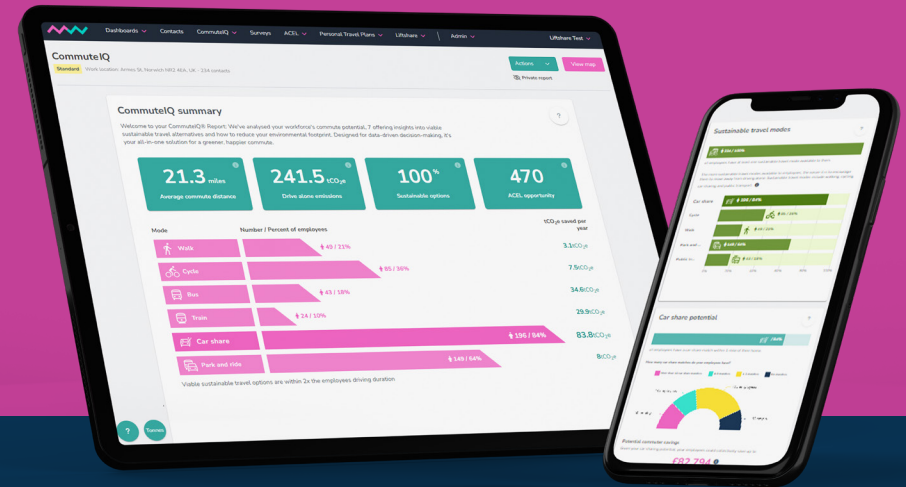
There is therefore a requirement for more sustainable commuting schemes, more cycling and walking lanes, and a more reliable public transport network, to help turn this year's small increase in sustainable commuting into a more substantial one.

There has been more investment in walking and cycling, with a £200 million fund made available in February 2023 to upgrade routes and paths across the country. However, as our Census found, the average commute for cyclists and walkers was five miles and one mile respectively. This means the benefit of this investment might not be felt by many as, according to the 2021 National Census, 64.6% of commuters live at least 10 kilometres (6.2 miles) away from the office.







For now, it's every employer's obligation to facilitate sustainable commuting. Organisations who support and incentivise their teams to do so generate benefits for everyone involved; from financial cost and environmental savings, to increases in productivity and engagement. This is why forward-thinking employers are now proactively seeking to reduce commuting emissions and are making progress towards their net-zero goals.

CommutelQ[®]

The 360-degree planning tool for viable sustainable commuting.



CommutelQ[®] uses employee postcodes and shift patterns to give detailed insight on the sustainable and viable commute options for your workforce. CommuteIQ's patented analysis engine has already analysed over a million employee commutes, and enables large employers to:

-  Uncover viable sustainable commute options for your team, beyond mere possibilities.
-  Calculate your potential environmental savings, aligning with sustainability goals.
-  Determine the individual cost and efficiency benefits of alternative travel options.
-  Develop a data-driven business case to allocate resources for enhancing on-site provisions.
-  Forecast potential improvements in employee health and wellbeing.
-  Identify gaps in transport provision, enabling discussion with local providers.

See it in action

www.mobilityways.com

Introducing Mobilityways

Scope 3 commuting emissions account for 5% of the UK's total emissions.

Often overlooked, commuting emissions are increasingly under the spotlight following organisations setting ambitious net zero targets. These targets cannot be met unless commuting emissions are addressed, particularly with many employers returning teams back to the office on a hybrid basis.

Mobilityways provides ground-breaking climate tech, empowering large employers to measure, reduce and report their commuter emissions.

Mobilityways is dedicated to decarbonising the commute, giving organisations full visibility of commuting challenges and identifying sustainable travel alternatives for employees.



Identify sustainable travel options

Gain full visibility of your current commuter landscape, understand the challenges and identify real-world sustainable travel alternatives for your team.



Achieve your net zero targets

Benchmark your commuter emissions against past performance, other organisations or regions. Set targets, track your progress and effectively measure the success of your mobility initiatives.



Engage your workforce

Remove the stress of the commute and promote the health and wellbeing of your team by supporting active and sustainable travel options.

Mobilityways uses ACEL© (Average Commuter Emissions Level) which is the only standardised methodology for benchmarking and comparing commuter emissions. This allows organisations to track their progress and measure the effectiveness of sustainable travel initiatives.



Start your organisation's zero carbon commuting journey

www.mobilityways.com



mobilityways

Ground-breaking climate tech, empowering large employers to measure, reduce and report on their commuter emissions.

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