



Commuter Census 2022[©]

- Key insights from 11,000 UK commuters
- Understand current UK commute modes and trends
- Learn about commuter sentiment & modal shift post-pandemic

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Commuter Census 2022 data was collected in March and April 2022. In total there were 10,984 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.

www.mobilityways.com

Foreword



Ali Clabburn

Founder & Chairman, Mobilityways

The commute has always fascinated me because it's so revealing; from the modes of transport we favour, to the intricacies of our working habits, how and when we choose to travel says a lot about how we live our lives.

For statistics lovers like myself, the most comprehensive dataset for the commute is published every 10 years as part of the Government's Census. This has long been used as the basis for each decade of travel planning policies.

When the 2021 National Census went ahead as planned, I couldn't help feeling this data would be dogged by COVID-19 anomalies, with the potential to distort travel planning decisions in the years to come. Not only could this affect the health, wealth and happiness of the nation's commuters but also hinder our collective efforts to decarbonise the commute and meet our net zero goals.

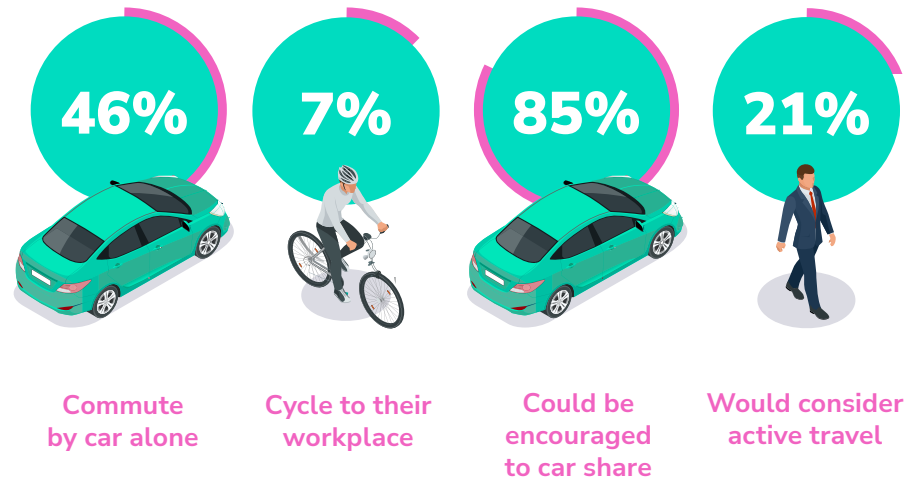
We decided to launch our own census to account for the pandemic response, and what we found was hugely insightful. Now in its second year, the Mobilityways Commuter Census continues to produce thought-provoking data, which we now share with you.

These responses afford us greater visibility of the current mobility landscape, helping us identify ways in which to improve it. We must support commuters to make more sustainable choices, accelerate modal shift to more sustainable modes and understand where emissions savings can be made today. We simply do not have the time to make these decisions blindly.

Together, we can make zero carbon commuting a reality - and we must, before it's too late.

Executive Briefing

Analysing the responses of 10,984 individual commuters has shown that whilst “car is still king” when it comes to travelling to work, there has never been greater appetite and willingness for behaviour change.

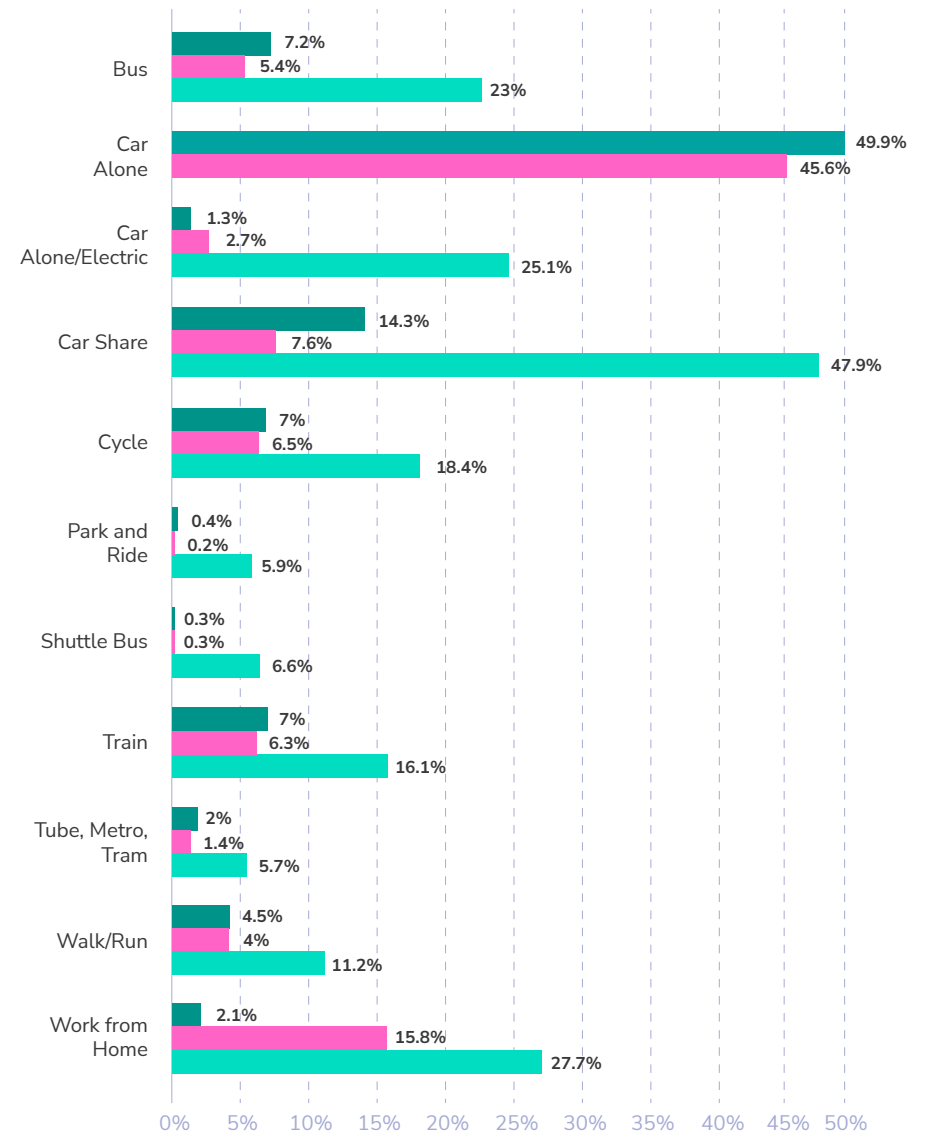


The data gathered in the Commuter Census shows that there has been a clear shift to hybrid working post-pandemic, however, many of those that are working remotely do not believe it will continue to the same extent long-term. Additionally, the data indicates that much of the modal-shift that occurred during the pandemic has not become permanent.

However, the pandemic did show that where there was a need, it was possible to drastically change habits. In our analysis we've identified that the vast majority of commuters (81%) would consider an alternative to their current mode, with the main factor in their current choice being “convenience”.

Another recurring theme in the data is how acute a need exists to decarbonise the commute. In July 2021, the UK Government released the Transport Decarbonisation Plan. For the first time in UK Government policy, it identified that the commute was a unique kind of journey and should have a decarbonisation strategy distinct from transport as a whole. The Department for Transport has named this policy “Commute Zero”.

Modal shift pre/post pandemic



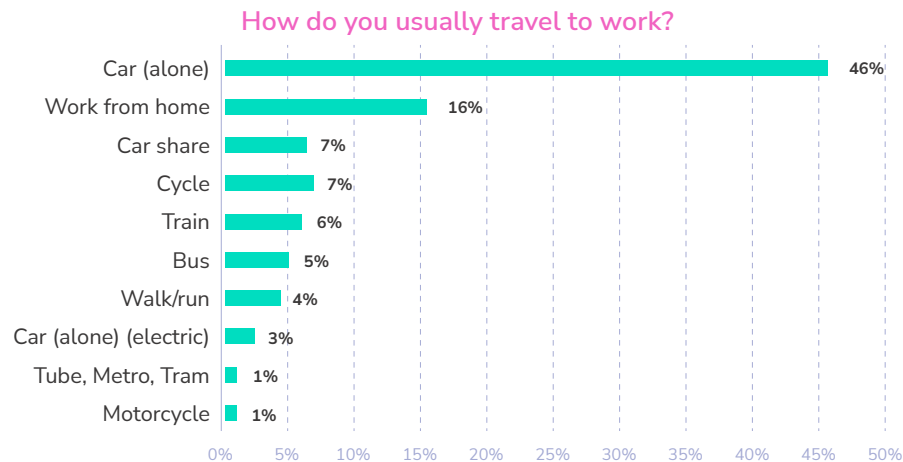
- How did you usually travel to work before the Coronavirus outbreak?
- How do you typically travel to work now?
- Which of the following modes of commuting would you consider?

Mode of travel

Perhaps one of the starkest findings from our Commuter Census 2022 is how entrenched single occupancy car commuting remains.

Single occupancy car commutes continue to dominate the mobility landscape, with 46% of commuters choosing to drive alone in traditional cars, i.e. those with an internal combustion engine. EV drivers made up just 3% of commuters, despite a 92% increase in EV sales since 2020, according to EV charging app, Zap Map.

Solo drivers of traditional vehicles and EVs combined made up 49% of all commutes in 2022. This is remarkably similar to single occupancy commute levels recorded in the Government's 2011 Census. This is despite the passage of time and accounting for post-pandemic changes in behaviour. A number of respondents cited proximity concerns with regard to shared transport, such as car sharing, trains, tubes and buses, which would account for a rise in single occupancy vehicle commutes.



“ I'm confident that we will see e-scooters further integrated into the UK's urban transport mix in the future, enabling people outside of the capital and right across the country to benefit

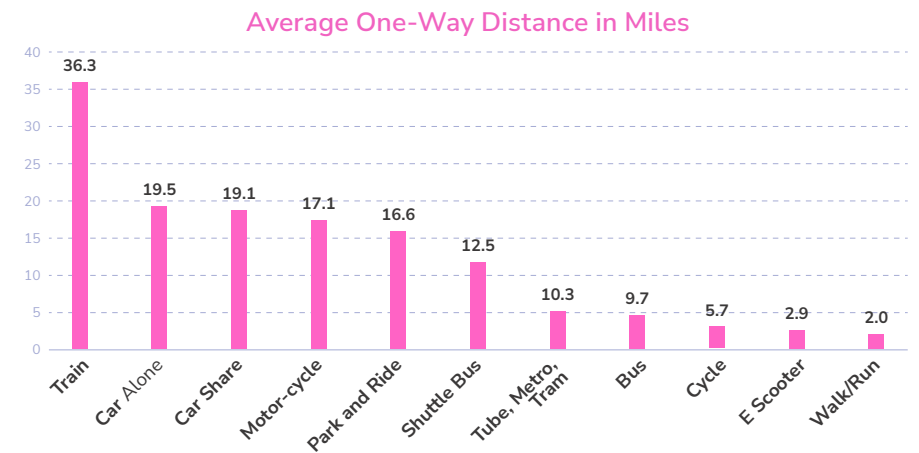
Georgia Yexley | General Manager UKI, Tier



All major physical commuting modes fell when comparing pre and post pandemic data, with the exception of remote working. The Commuter Census shows that working from home was now the second most popular commuting mode. However, despite ONS reports that nearly half of all employed people worked from home during the height of the pandemic in 2020, just 16% of our Commuter Census respondents declared they were now exclusively working from home.

When we asked these remote workers how they thought they'd be commuting in the future, this figure further reduced to 14%. It appears the lasting change in travel behaviours is not in modal-shift, but rather the regularity of commutes being undertaken.

The Commuter Census also revealed a clear link between commuting distances and mode of transport. For example, the average walking commute was 2 miles, which is approximately a 35 minute walk. Comparatively, cycling allowed active travellers to commute further, more than doubling the average distance at 5.7 miles.



Regarding car usage, there was no significant difference between the distance travelled by drivers traveling alone or those choosing to share. This highlights the importance of potential sharers living close to one another - and the latent potential of car sharing to reduce the number of vehicles on our roads.

The distances of public transport varied widely by mode, with buses predominantly used for short journeys of less than 10 miles. Trains were favoured for the longest journeys with an average commute distance of 36 miles, 1.9 times further than the average car commute.

Flexible Commuters

Prior to COVID-19, 68% of British employees had never worked from home. In April 2020, 46.6% of people in employment were working remotely. At the time, a YouGov survey found that 91% of remote workers wanted to continue working from home at least part of the time after restrictions were lifted.

These sentiments were mirrored in the Mobilityways Commuter Census 2021. When asked how they planned to travel to work next year, 26.8% of respondents said they would be working from home for the majority of the time. The 2022 Commuter Census confirms this has been the case, with 49% of respondents commuting a maximum of just two days a week.

Arguably, this still reflects the post-pandemic transition, with many employers still solidifying their working policies, whether that be a full time return to the office, hybrid or remote. However, our data suggests forward looking employers should account for how their teams feel about the commute before making permanent policy changes.

When asked how many days they would like to commute in the future, only 7% of respondents wanted to commute 5 days a week, despite a quarter of them already doing so. The commute - or lack of it - is one reason why nearly a quarter of those asked wanted to work fully remotely, all the time.

Employers should be wary that the gap between desired hybrid-working and the current reality will no doubt encourage those dissatisfied with their current working practices to consider switching to an employer with a more flexible approach.

“ I travel 10 miles by bus and this takes me an hour and a half each way. I would much prefer to work from home but I’m currently not allowed to.

Jennifer | Nottingham

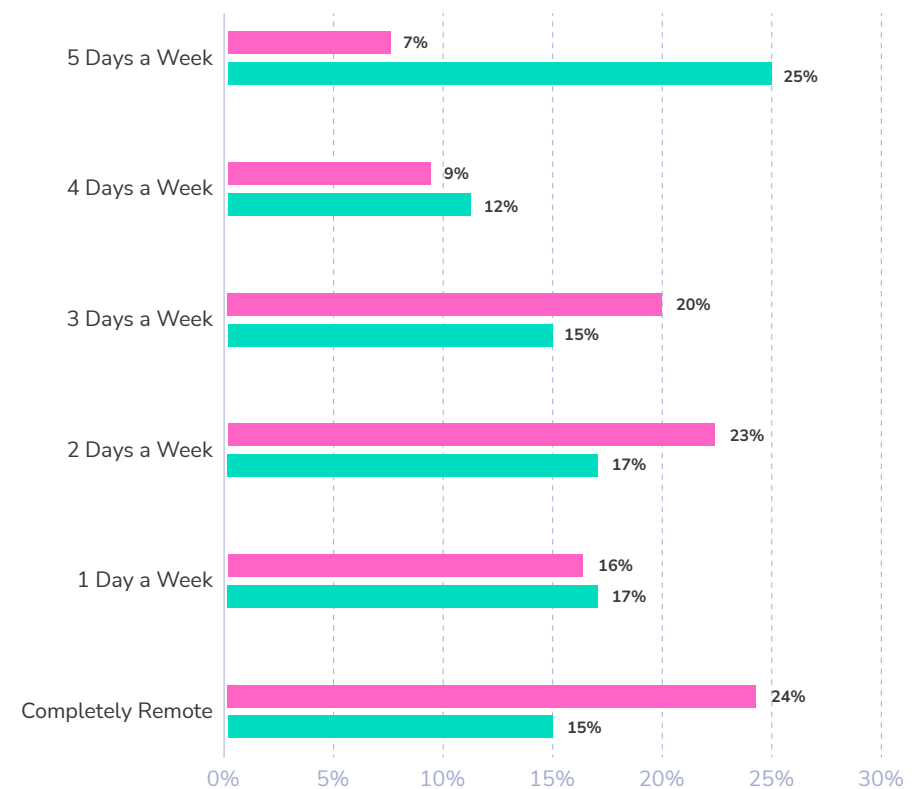


I believe working from home should remain where jobs can be performed remotely as it is better for the environment.

Carol, Glasgow



Hybrid Working Desire vs Reality



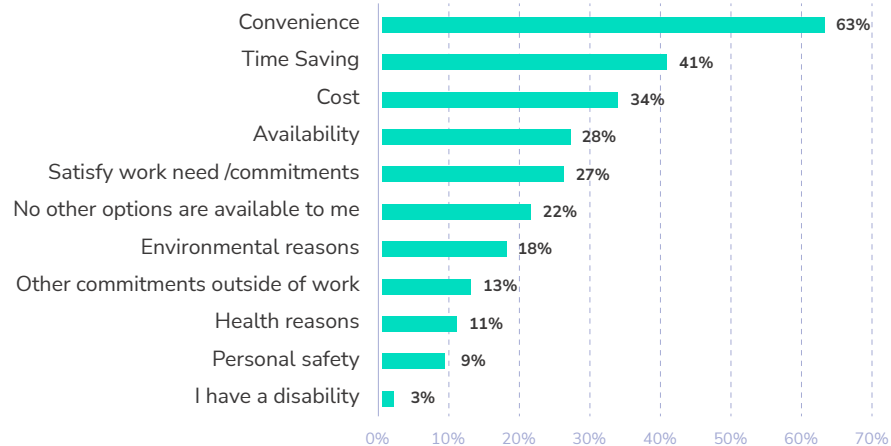
- If the choice was yours to make, how often would you like to commute?
- How many days of the week do you typically travel to work?

Commute Preferences

Despite conventional wisdom around workers not having adequate commuting options - the Commuter Census data clearly shows a significant majority of commuters (63%) are predominantly driven by convenience. Only 22% of respondents identified that there were “no other options available to them”.

Commute distance was also shown to impact commuter decisions. There was a clear correlation between the number of days commuters travel to site and how far they live away from their workplace.

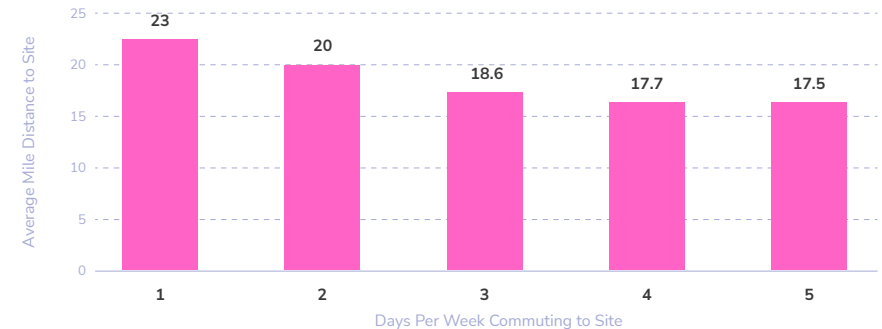
Why do you use this mode of travel?



The Commuter Census revealed single occupancy vehicle commuters, travelling to the office five days a week, live an average distance of 17.5 miles away. Whilst single occupancy vehicle commuters driving to site just one day a week live an average of 23 miles from their workplace - 31% further away. This indicates a clear correlation between length and frequency of commutes. Employers looking to widen their talent pool should consider embracing hybrid-working as this will expand the geographic area their workers will consider commuting from.

While it's little surprise that time savings and cost continue to be the key drivers of our commuting behaviours, it's also important to consider the external pressures dictating the future of the commute.

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



“ Changing personal behaviours to reduce carbon emissions isn't a strong enough argument in and of itself for most people to change their deeply ingrained commuting behaviours. You need to make it personal to people, you need them to understand how to make the switch.

Paul Chandler | Deputy Director of the Net Zero Travel & Transport, NHS England

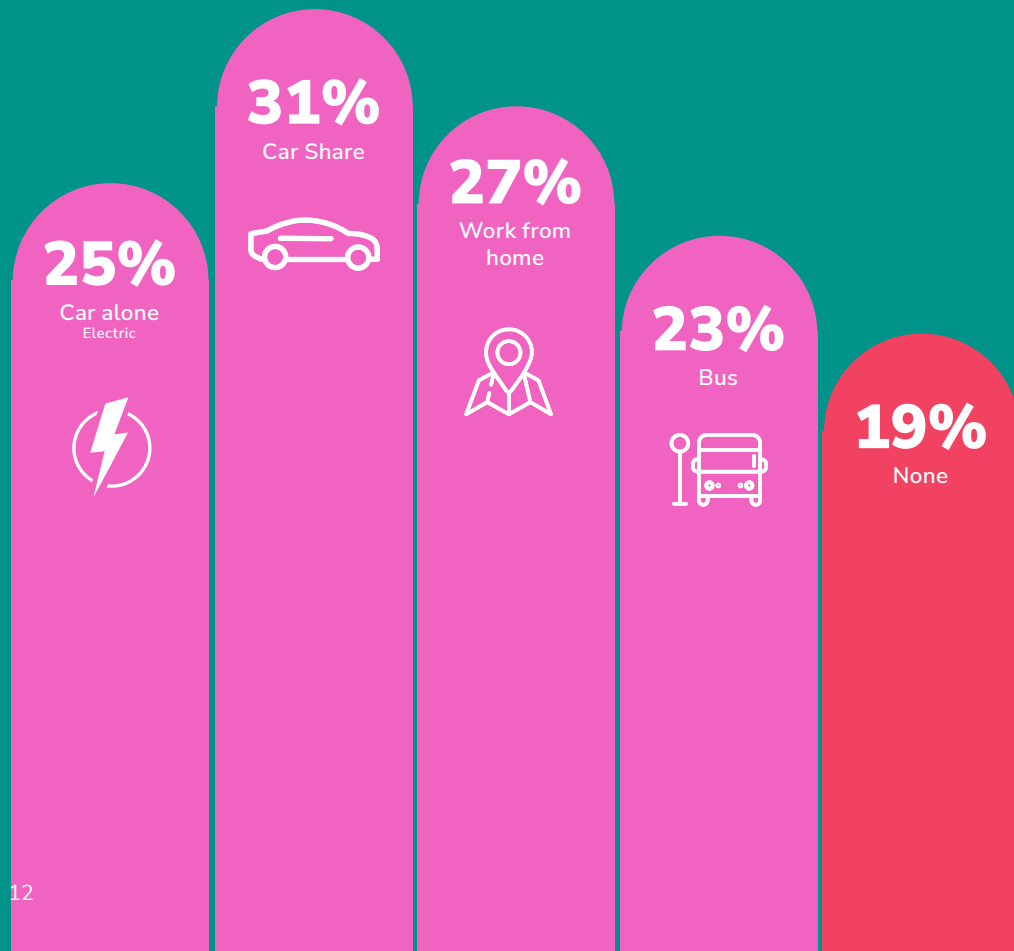
“ Buses take too long - three to four times longer than driving. There's also no direct train route for my journey via Newcastle or Darlington, which is expensive and time consuming.

Kevin | Newcastle

“ I would love to get the train but it's simply not reliable or affordable in South Wales.

Evelyn | Swansea

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



I would consider car sharing and have approached the Sustainability Lead at my hospital about lift sharing, and what more we can do to encourage staff to get involved.



Rachel | Northampton



I drive to work because it's almost impossible to get there quicker and cheaper than this. Trains are far more expensive and would double my commute time. The bus doesn't come anywhere near my house.



Andrew | Glasgow



We really need to target people at critical moments in their lives when things change, like they move house, or they move jobs or they have a child.



Dr Lucy Mahoney | C40 Cities senior cycling and walking manager



DID YOU KNOW?

A study led by the University of Oxford's Transport Studies Unit found if 10% of the population successfully switched from a car to an active travel mode just one day per week, the emissions savings would be around 4% of lifecycle CO2 emissions from all car travel.

Behavioural Change

The commuting modal shift over the pandemic shows how open workers can be to behavioural change.

Whilst much of the pandemic modal shift was temporary, the Commuter Census shows there continues to be a strong appetite for considering alternative modes.

Which alternative modes would drivers consider?



“ Shared transport is much more efficient than owning transport assets, particularly cars, and that results in huge dividends in terms of number of cars that are needed in an area to fulfil journey needs - in other words far less of them.

Richard Dilks | CEO, CoMoUK

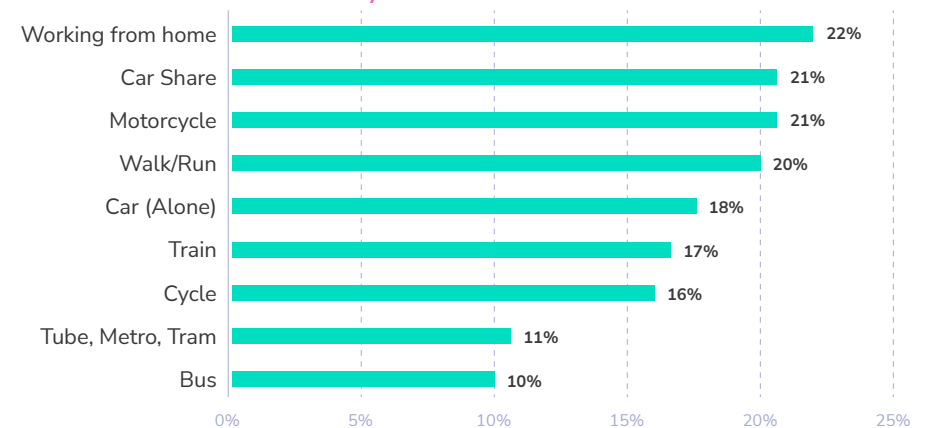
Across all commuters, when asked “Which of the following would you consider as an alternative to your current mode of commuting?”, the majority of respondents were happy to consider a sustainable alternative, with less than a fifth (19%) refusing to consider any other modes at all.

When contemplating which alternatives would be most suitable, car sharing was the most popular - 31% of respondents stated they’d be willing to share their journey as a driver or a passenger. The second most popular alternative (at 27%) was working from home.

When scrutinising the data for single occupancy car commuters, only 18% were unwilling to consider any alternative forms of transport, 21% were open to active travel, such as walking and cycling, and 36% expressed an interest in car sharing.

When asked directly about car sharing, 85% of respondents said they could be encouraged to share, with the vast majority highlighting they would be more willing to make this change “if they could find someone that shares their route to work”. This suggests the biggest barrier to car sharing is not the attitude of commuters, but the logistics of finding a car sharing partner. Bridging this knowledge gap, and improving the perception of the ease and convenience of car sharing could support a higher-degree of sustainable modal shift.

Current mode commuters who would not consider any alternative mode



“ Unsurprisingly it’s employees living closest to the airport that gives us the ideal opportunity for getting them to consider modal shift from car to more sustainable travel. Given the density of colleagues’ home locations in these areas, car sharing should be a very attractive option even with the variation in shift patterns. There should always be somebody on a similar shift going in your direction.

Matthew Wool | Route Development Lead, Heathrow Airport

On the subject of sustainability barriers, only 7% of people said that there was no significant barrier to pursuing a more sustainable commuting option, they simply had no desire to change. The remaining 93% outlined one or more blockers that prevented them from changing their travel behaviours. The vast majority of these barriers to change, 50% combined, were related to a lack of flexibility or perceived inconvenience of sustainable commute options.

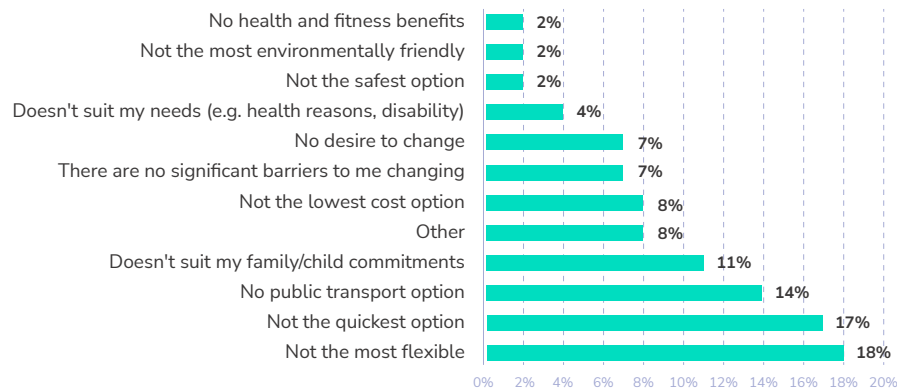
“ As I walk quite a big distance, I wouldn't mind using a bus from time to time. However the times are so infrequent. Sometimes there are no buses driving past me, sometimes there are multiple ones. I can't afford to stand at the bus stop to see if something is going to arrive as I would be late for work ”

Natalie | Cheltenham

Unsurprisingly, those currently working from home were the least willing to consider alternative commuting options. This makes sense due to the additional inconvenience, cost and time penalties these added journeys would incur.

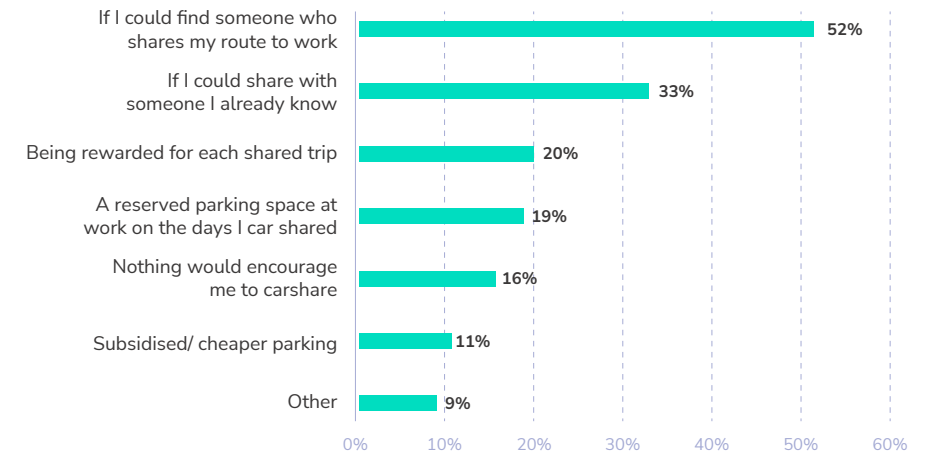
Existing car sharers (21%) and walkers (20%) were also less likely to consider changing their commutes. Some of the commentary around these answers highlighted commuters taking joy in these journeys. This mirrors earlier findings from Liftshare members, with 44.2% of Liftshare users believing car sharing made their journey to work less stressful. The health benefits of a walking commute are also widely recognised, with active travel reported to boost worker's productivity and concentration.

What would be the biggest barrier to you travelling differently?



Those most open to alternative modes were those using public transport - with 90% willing to consider alternatives. This is where some of the most negative sentiments were raised, with frustrations with rising costs, infrequent services and spatial inequality, with rural areas being particularly under-served by public transport.

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



“ We are reaching a tipping point where shared mobility in the form of car clubs, scooters and bike shares will soon be a realistic option for many of us to get around. I think the benefits are really significant: from clean air, to healthier populations, to greater connectivity for more people, no matter where they live. ”

Trudy Harrison, Former Minister of State for Transport

“ Getting people out of private cars and onto public transport is one of the most impactful changes we can make, and it's something that can be done right now. ”

Matt Greener, Director of Arriva Group's Zero Emission Institute

How do you feel about the current price of petrol/diesel?

Not At All Concerned

3%

Not Applicable

8%

A Little Concerned

27%

Very Concerned

61%



DID YOU KNOW?

Zero Carbon Commuting could be the answer to rising fuel costs. Over half a million employee postcodes have been analysed using the Mobilityways Scoping Smart Mobility tool, revealing 95% of UK commuters analysed have at least one viable sustainable commuting option available to them.

Results from the sample, which was taken from over 350 large employers, revealed that 40% of employees were close enough to walk or cycle to work, 53% of employees had an accessible public transport route available to them and 91% of employees could share a lift with a colleague.

Fuel Crisis & Cost of Living

Inflammatory headlines aside, how are commuters really feeling about rising fuel costs amidst a cost of living crisis?

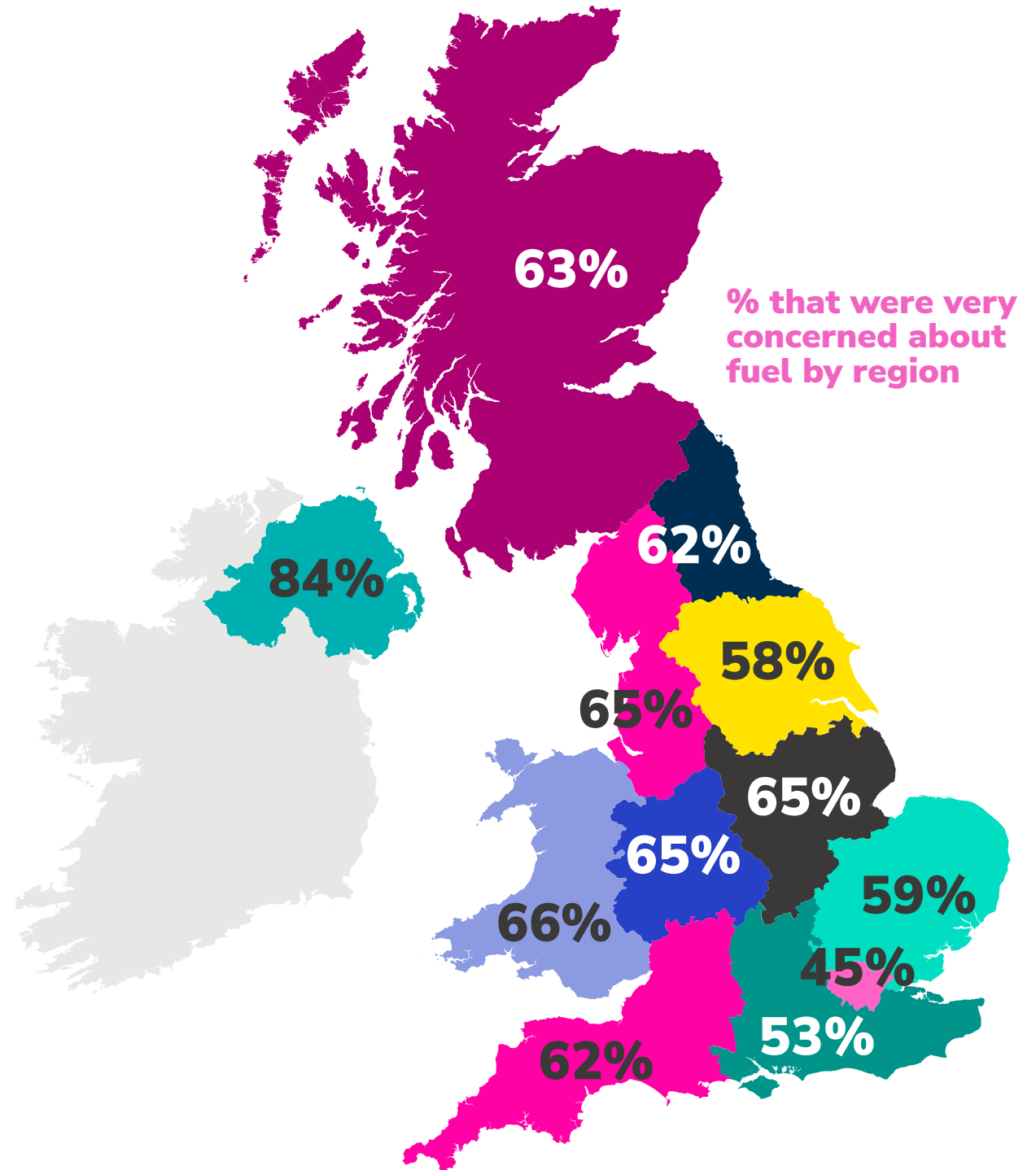
The vast majority (61%) proclaimed to be 'very concerned'. This is perhaps unsurprising with record highs of petrol and diesel prices pushing an average of £2 per litre.

27% of our Commuter Census respondents felt less strongly but declared themselves to be "a little concerned", with only 3% stating that they were not concerned at all. However, the national data only tells part of the story, with a large variance in feelings between the South-East of England and the rest of the UK.

84% of Northern Irish commuters identified as being "very concerned" about rising fuel costs compared to just 45% of Londoners. A likely combination of factors have caused this discrepancy in commuter sentiment, including car-reliance in Northern Ireland's rural communities and better connectivity and public transport provisions in South-East England. London also has the lowest rate of vehicle ownership in the UK, and higher wages, which may provide a buffer for additional costs.

“ We know from the research over the past two years that the commute was always the biggest obstacle in getting people back into London post-pandemic. This new data shows that the cost of living crisis, combined with the prospect of fare increases following the new TfL deal with the government, has the potential to set the recovery back.

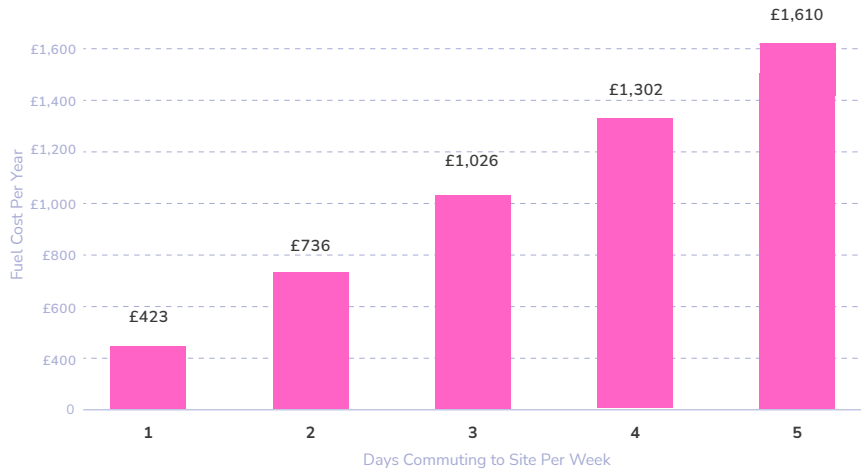
Ruth Duston | Chief Executive of London Heritage Quarter



Using the average commute distance of 19.5 miles for a single occupancy car journey, the average current UK fuel price of £1.75 per litre, and the average car consumption of 40 miles-per-gallon, this equates to a round trip cost of £7.80 per day.

Fuel Cost / Year

(Assuming 46 working weeks a year, £0.20 per mile)



The Commuter Census shows that five-days-a-week commuters have a journey that is on average a third shorter than those commuting just one day a week. Yet even with that shorter distance the average five-day car commute equates to £1,610 a year in fuel alone. This cost, when considered in conjunction with insurance, road tax and maintenance costs, become increasingly non-viable for many commuters.

The forecast isn't much better for those without access to a vehicle. A report from the Campaign For Better Transport charity in early 2022 found that public transport in UK cities was the most expensive in Europe. It has also been reported that UK bus users face "significant" price rises in 2023, with operators expected to lock in fuel purchases at higher rates for the next year, further burdening the millions of commuters who rely on public transport.

“ **With the cost-of-living crisis and rising cost of fuel, walking, wheeling (for example in a wheelchair or mobility scooter) and cycling should continue to be made the easiest, most obvious and convenient choice for short, everyday journeys.** ”

Xavier Brice | Chief Executive, Sustrans

Regional ACEL

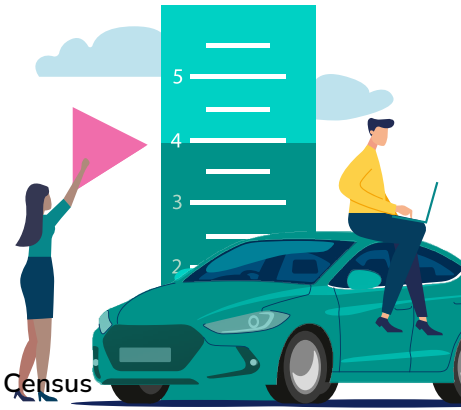
By combining the Government's latest greenhouse gas conversion factors, with the mode and distance provided for each commute, we've calculated the ACEL (Average Commuter Emissions Level) for each region. ACEL is expressed in kg of CO2e per year per commuter.



DID YOU KNOW?

According to ONS, between October to December 2019 and January to March 2022, homeworking in the UK more than doubled from 4.7 million to 9.9 million people. Increases in homeworking varied across UK regions, with the largest percentage increase in homeworking in Scotland, up 203.5% and the smallest was in Northern Ireland, up 56.4%.

The need For change



Inertia has fuelled the climate crisis for too many years. Worryingly, this Commuter Census suggests we're on a path to more of the same if we don't collectively take action now.

If we look back to when the pandemic hit, our commuter habits changed overnight. Researchers from the University of East Anglia estimated that national lockdowns reduced global carbon emissions by 2.4 billion tonnes. A proportion of this reduction can be credited to a mass move to home working and an uplift in walking and cycling for shorter journeys. Combined, these actions resulted in less congestion, improved air quality and generated less pollutants which saw wildlife flourish.

The pandemic revealed the shocking impact our mobility choices have on the environment and the scope and scale of the benefits when we change them. Whilst the gradual increase in prevalence of EVs and the undertaking of hybrid working patterns will decrease tailpipe emissions over time, we need to do more to drive down commuter emissions now - the key has to be behaviour change at an individual level.

Arguably, it's every employer's obligation to facilitate sustainable commuting within their organisation. 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-looking employers are now proactively seeking to reduce commuting emissions and are making good progress to their net zero goals.

“ We must deliver a step change in the breadth and scale of our ambition to reduce transport's GHG emissions to reach net zero.

Rt. Hon. Grant Shapps MP | Transport Decarbonisation Plan ”

PROLOGIS® Impact Story

Driving customer engagement through zero carbon commuting data and solutions.

Prologis is one of the UK's largest private landlords, leasing industrial logistics building to many of the UK's biggest brands. As a business committed to building long-standing relationships with customers and the communities close to its parks, they launched the Hub at DIRFT in Northamptonshire. This brand new facility was designed with a dedicated space for site occupiers to meet and learn.

2050
commitment to be
carbon neutral

68%
reduction in
emissions target
before 2030

22
UK sites

In a bid to support their customers in embedding sustainability across their business operations, Prologis sought to help the employees of their customers commute more sustainably. Utilising Mobilityways Travel Survey, Scoping Analysis and Commutology Consultancy, Prologis were able to identify gaps in transport provision for their customers. This allowed the development of new shuttle bus services, public bus routes and a rewards and incentivisation pilot.

Combined, these opportunities will support their customers to decarbonise the commute, provide access to a greater pool of talent, save employees money and minimise the DIRFT's environmental impact.

“ The data collection piece is absolutely at the forefront of zero carbon commuting. Without that data we can't make meaningful choices and we can't invest in the right places and get the most for our money to get the most benefit out of whatever subsidies we have available.

David Mellor | Director of Project Management, Prologis ”

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. The Mobilityways Dashboard is the only software solution 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.

The Mobilityways Dashboard is uniquely powered by 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.

“ We know employers are under increasing pressure to support their teams to commute more sustainably - both from an employee engagement and environmental perspective.

Mobilityways offers practical solutions that can help individuals and organisations make financial and emissions savings.

Julie Furnell | Managing Director, Mobilityways



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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