Mobility study 2024

Travel habits in the wake of inflation

- a comparison of the Nordic capitals

Building future-ready mobility in the Nordics

It is with great joy and pride that we at WSP present the Nordic Mobility Study 2024. A continuation of our previous mobility study, carried out in 2022, this report offers a comprehensive analysis of mobility patterns and trends in the Nordic region. The comparison between our metropolitan areas is unique, and I am pleased that we can provide such insights from Stockholm, Helsinki, Copenhagen and Oslo.

Mobility is a central part of our society that affects both our daily lives and the long-term development of our cities and our world. By understanding how people move, what factors influence our choice of transportation means, and comparing the results between several regions, we can work to create more efficient, attractive, climate- and environmentally-friendly transport solutions.

Our goal is to provide decision-makers, professionals, and the public with valuable insights and data that can help shape the sustainable transportation systems of the future. We hope that the Nordic Mobility Study 2024 will be a resource for everyone wishing to develop and improve transportation systems in the Nordic region.

Best regards,

Anna-Lena Öberg-Högsta
CEO, WSP Sweden and the Nordics

The impact of rising costs, remote work and electrification on mobility

Welcome to the second WSP Nordic mobility study. Once again, our comprehensive report unveils a host of new insights. The survey, carried out in May and June 2024, offers a clear picture of how travel habits in the four Nordic capital regions have been impacted by the recent cost-of-living crisis. It also highlights the evolution of remote working and the pace of electrification, while providing unique local comparisons of travel habits.

The results reveal that the inflation of recent years has significantly influenced both how we travel and how often. More than half of the respondents reported having altered their commuting habits due to increased costs, either by switching means of transport or travelling less often to the workplace.

Our findings also suggest that remote work may soon be on the rise again. While levels have remained relatively stable since the end of the pandemic, a growing number of individuals today have the opportunity to work remotely. This issue continues to engage both employees and employers, with almost 40 percent expressing a desire to increase their remote working. Additionally, about a third of respondents stated that their employer has adopted a more flexible stance on remote working over the past year.

This year's study also highlights the continued expansion of electrification, though access to electric vehicles remains disproportionately concentrated on higher-income and younger age groups.

Moreover, the study uncovers notable differences between the metropolitan regions and interesting local mobility trends. Stockholm has the largest share of public transport users but faces a decline in ridership. Copenhagen is experiencing both a decrease in cycling an increase in public transportation ridership, while Oslo is fully embracing electrification. Meanwhile, Helsinki stands out for its high share of walkers and widespread adoption of remote working.

Lasse Brand,
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Rising costs are keeping us at home and changing how we travel

The sharp cost increases of recent years have drastically changed everyday life for many. We have now investigated how these rising costs affect our daily mobility.

Our study reveals that more than half of urban residents – 52 percent – have changed their means of transport for commuting, or commute less frequently as a result of increased costs. An even larger proportion – 53 percent – have adjusted their private travel habits, either by switching means of transport or by travelling less often. When it comes to commuting, most people changed their mode of transport, while for private trips, both switching modes and reducing travel frequency were equally common. In both commuting and personal travel, the largest reduction was seen in car journeys, while cycling and walking increased.

The impact of rising costs on mobility is significant across all cities, with the greatest effect observed in Oslo, while Helsinki's residents have been the least affected.

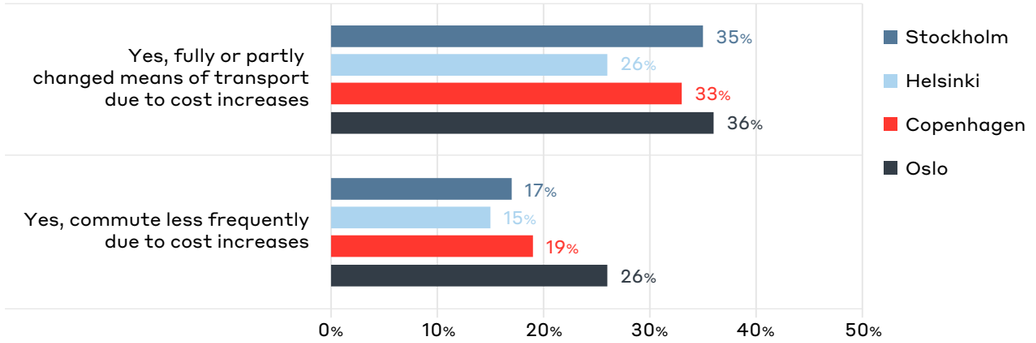
Young people and families hit hardest

The cost increases have influenced different social groups to varying degrees. There is a clear link between age and changes in mobility, with younger individuals much more frequently adjusting their travel behaviour. Additionally, people with children under the age of 18 were more likely to change their means of transport or reduce their travel, both for commuting and private journeys. A common characteristic among these groups is that they typically have smaller financial margins, making them more sensitive to price increases. However, both age and having children under the age of 18 had a much stronger correlation to changes in mobility compared to income.

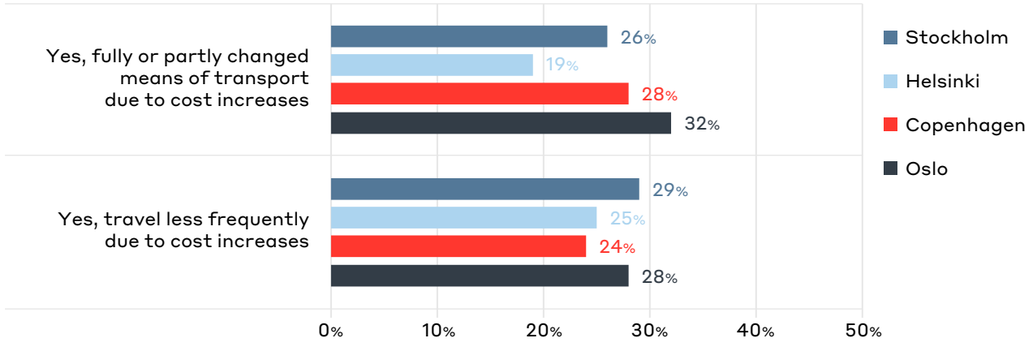
Remote work – a budget strategy for some

It remains to be seen how long lasting these changes will be. As inflation declines, and interest rates drop, purchasing power will return, possibly bringing back previous mobility habits. However, our data clearly shows that large numbers of city dwellers have adapted their travel habits due to rising prices and weakened household finances. This provides a valuable lesson for transportation planners in preparing for future economic downturns. Additionally, the use of remote work as a money-saving strategy highlights another divide: between those who must be physically present at work and those who have the option to work from home.

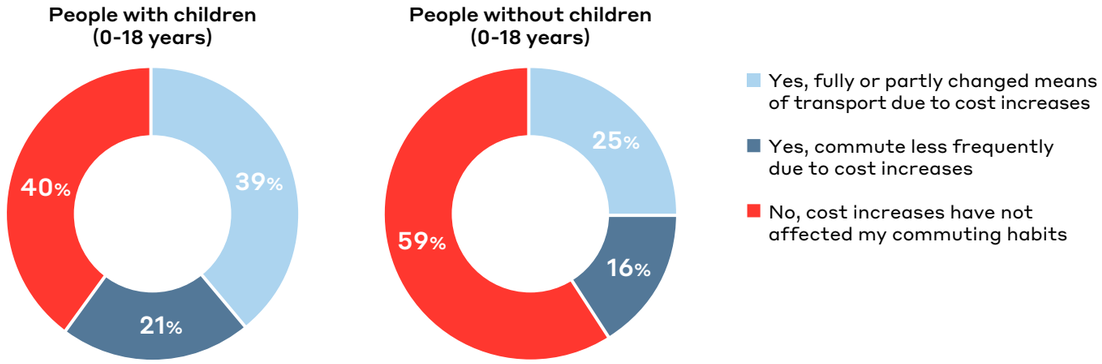
Have the cost increases of recent years affected the way you commute to and from work/study?



Have the cost increases of recent years affected the way you travel for private purposes?



Have the cost increases of recent years affected the way you commute to and from work/studies?



Electric mobility – trends, inequality and local differences

Looking across four cities, it's clear that electric mobility is on the rise. Access to hybrid and fully electric cars, electric bicycles, electric scooters, and charging infrastructure, is increasing in the Nordic capitals. However, there are significant differences between them. Oslo is the clear leader in the electrification of its vehicle fleet, showing by far the highest availability of all types of electric vehicles and charging infrastructure. Oslo also stands out in the share of respondents that used electric vehicles during the previous month. It's a close race between Stockholm and Copenhagen for second place, while Helsinki consistently lags far behind the other cities in all categories.

Compared to 2022, more people today are planning to buy a new car in the next three years, with the exception of residents in Helsinki. Generally, electric cars are preferred but while it is the most obvious choice for residents in Oslo and Copenhagen, the results from Stockholm and Helsinki show a slower uptake of hybrid and electric vehicles.

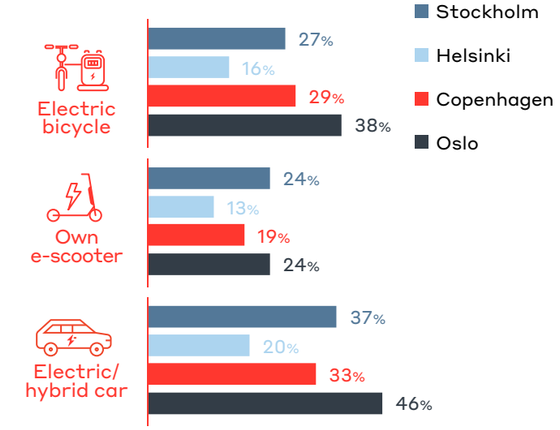
E-scooters: popular in Oslo, divisive everywhere

Since their sudden introduction, electric scooters have been one of the most debated elements of electrification. Initially, the focus was primarily on rental schemes. Rental e-scooters are available in all four capitals but seem to be most widely used in Oslo, where a third of respondents had rented one in the past month.

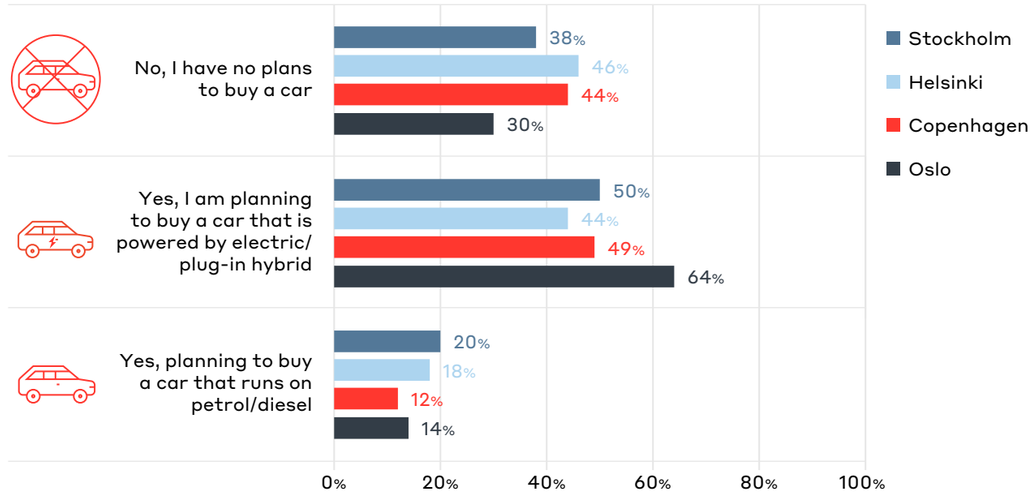
In recent years, privately owned e-scooters have become more common. According to our results, using one's own e-scooter is now almost as common as renting one. Oslo and Stockholm are the Nordic leaders in this regard, with a quarter of respondents having used their own e-scooter in the past month.

Overall, e-scooters have become quite common in the Nordic capitals, especially in Oslo, although only represent represent a small part of the mobility system. When asked about their main means of transportation, only about three

Access to electric vehicles



Do you have plans to buy a car within the next three years, and if so, what kind of car?



percent said e-scooters, which shows that e-scooters function primarily as a complement to other means of transport. When asked which means of transport the respondents had previously used for their present e-scooter trips/journeys, about a third said they used a car, while most others replaced more sustainable means of transport.

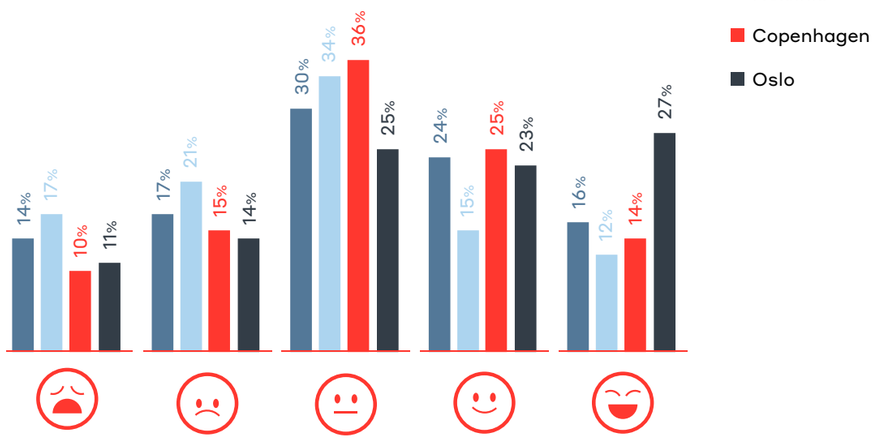
E-scooters tend to evoke strong emotions and opinions. However, on average, positive and negative views seem to balance out. Roughly one third of respondents views them favourably, one third is undecided, with the remainder having a negative view. However, Oslo, where half of the respondents reacted positively, is a clear outlier. This may be explained by the differing regulatory approaches towards e-scooters in the Nordic capitals, particularly regarding rental authorisation and parking rules. Perhaps the other Nordic capitals can draw useful inspiration from Oslo.

Electric expansion but gaps remain

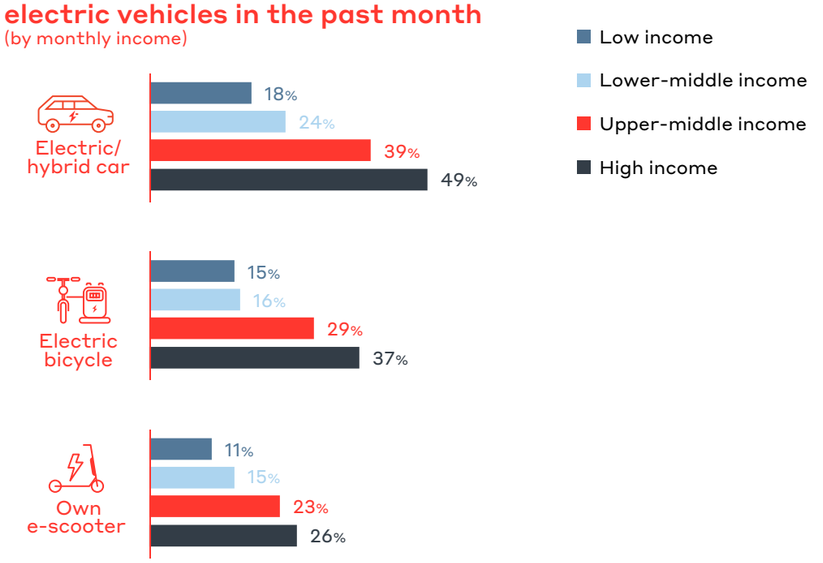
In 2024, electric mobility reached large parts of the capitals' populations but is still unequally distributed among income and age groups. Access to, and use of, electric vehicles is strongly linked to income, especially for plug-in hybrids and fully electric cars. Here, the highest income group has over three times the access and use compared to the lowest. For e-bikes and e-scooters, the link is weaker but still significant.

A larger share of younger people (up to 44 years old) has access to and uses all types of electric vehicles compared to older people, indicating a clear age effect. This trend is not seen with petrol cars and regular bicycles, suggesting that electric mobility specifically attracts younger users – and might pose technological barriers for older ones.

In your opinion, how have electric scooters affected the urban landscape and travel habits in your city/region



Share of participants using electric vehicles in the past month
(by monthly income)

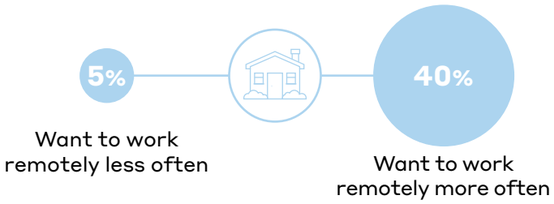


Remote working may be on the rise

Furthermore, our results suggest that remote working is still partly linked to income but has spread across all income and age groups. People with higher incomes are more likely to have the option to work remotely and are more willing to do so, but actual remote working is now equally common across all income levels. Similarly, younger people are more likely to have the option and willingness to work remotely, yet remote working is equally common across all age groups. There is no correlation between having children under 18 and the frequency of remote working, but parents show a stronger desire work remotely than others.

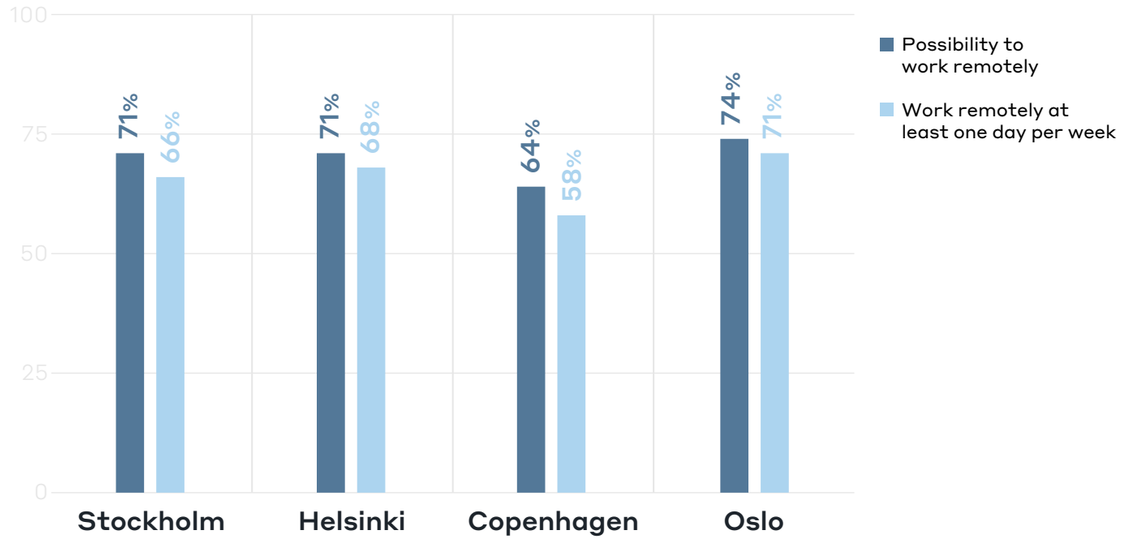
The question of the future and extent of remote working, as well as what constitutes “the new normal”, continues to spark debate. Hybrid work life has firmly established itself after the pandemic. Our study shows similar levels of remote working to those of 2022, with no indication of a return to pre-pandemic patterns. If anything, our study suggests a slight increase in home-based working. In all four cities, the proportion of people having the opportunity to work and study remotely has increased. Employers have become more open in their approach to remote working over the past year, and many people wish to work more from home.

Desired amount of remote work

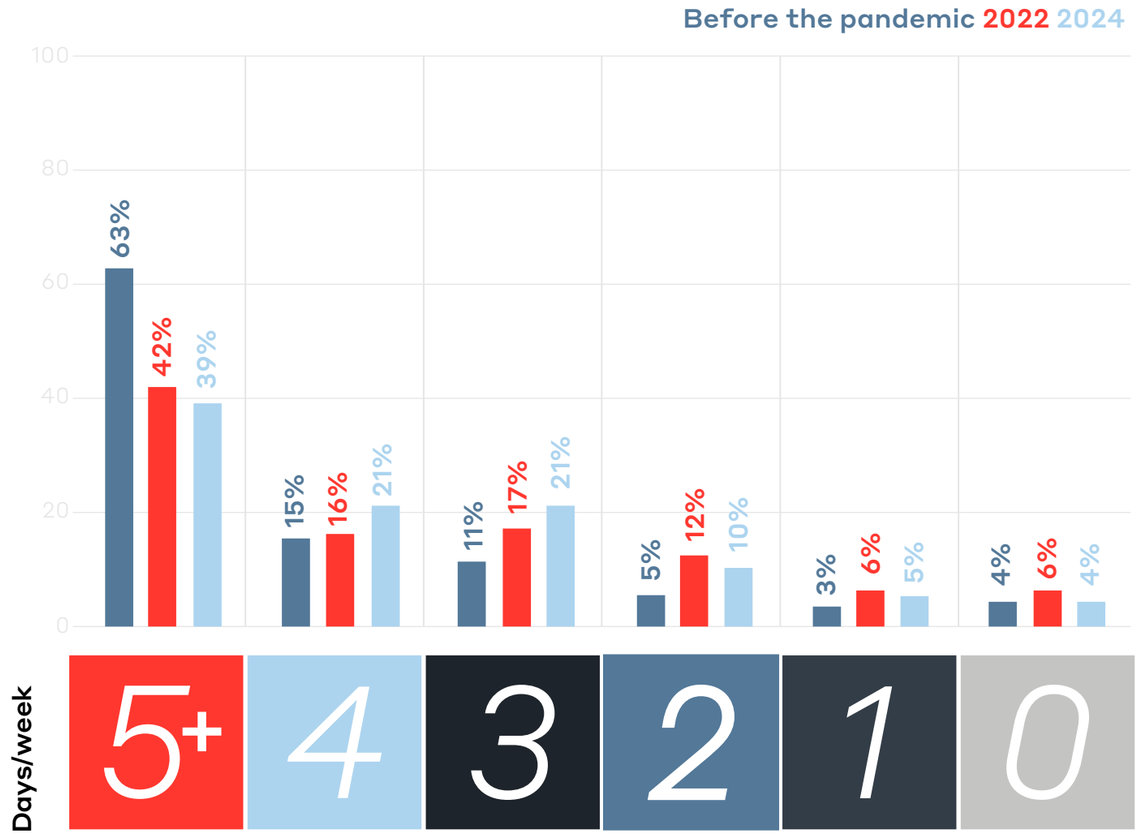


Change in employers’ attitudes in the past year

Possibility to work remotely and share that does so



How often do you commute to work/study?



Local differences in adoption

When comparing the cities, our results show that Helsinki is the capital where remote work is most utilised/common, while Copenhagen has embraced these opportunities the least – reinforcing findings from our 2022 study. Oslo stands out as the city with the highest percentage of the population wishing to work more remotely, 47 percent, compared to 36 - 40 percent in the other cities.

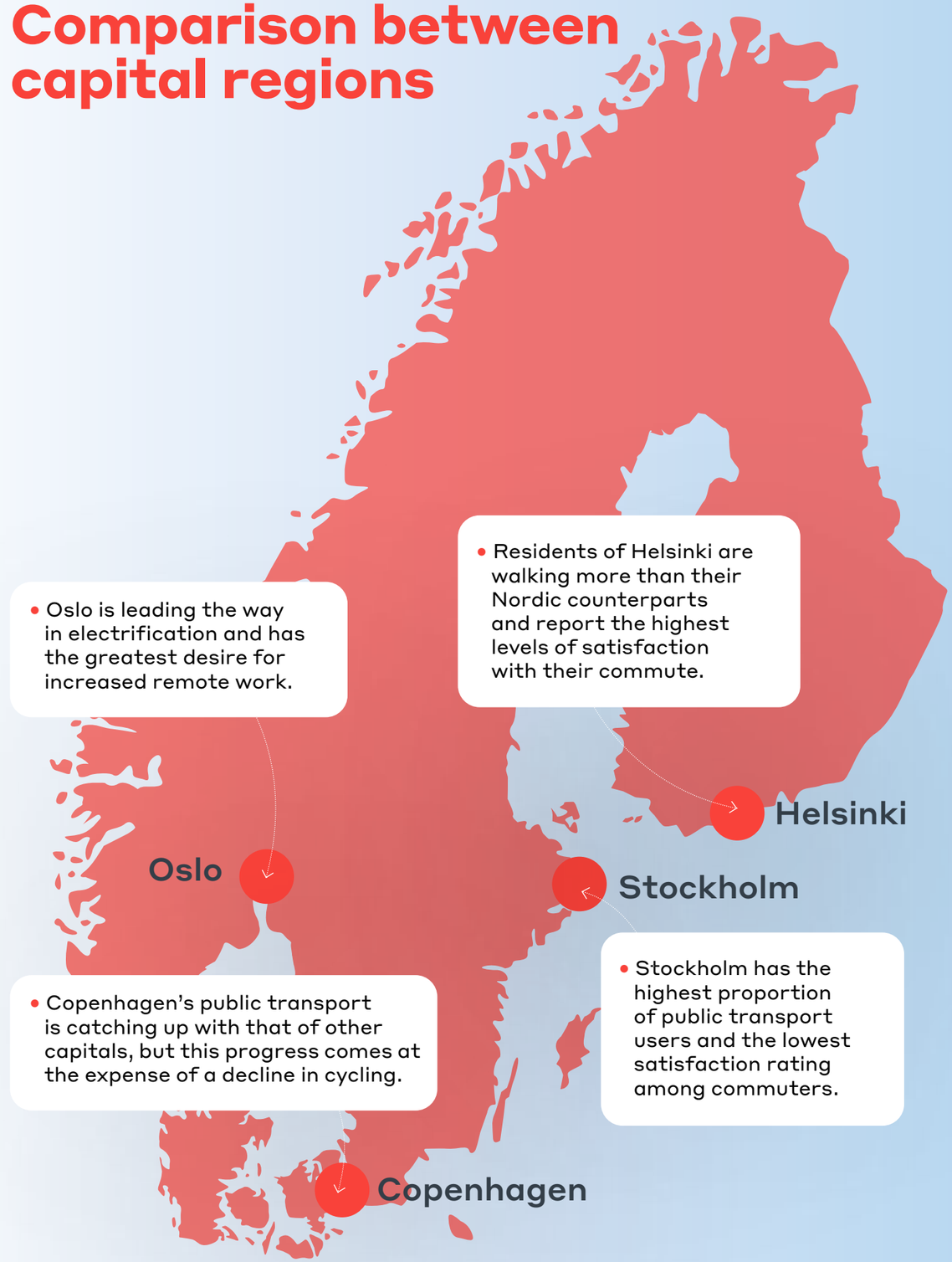
No impact on commuting tolerance

However, despite the high levels of remote working, we do not see an increased acceptance of longer commutes. A prediction made by many during the pandemic was that more people would want to move out of cities and that the acceptance for longer commuting times would increase, given that commuting would be less frequent. However, our results show that this does not seem to be the case. About two out of every three people want to live within a 30-minute commute from their job. This desire is particularly strong in Oslo, where about four out of five people want to live within 30 minutes of their workplace.

How long travel time from home to work can you imagine having as you see it today?

	Stockholm	Helsinki	Copenhagen	Oslo
>90 minutes	2%	1%	2%	4%
<90 minutes	9%	4%	7%	4%
<60 minutes	32%	28%	33%	13%
<30 minutes	38%	46%	41%	42%
<20 minutes	19%	21%	18%	37%

Comparison between capital regions



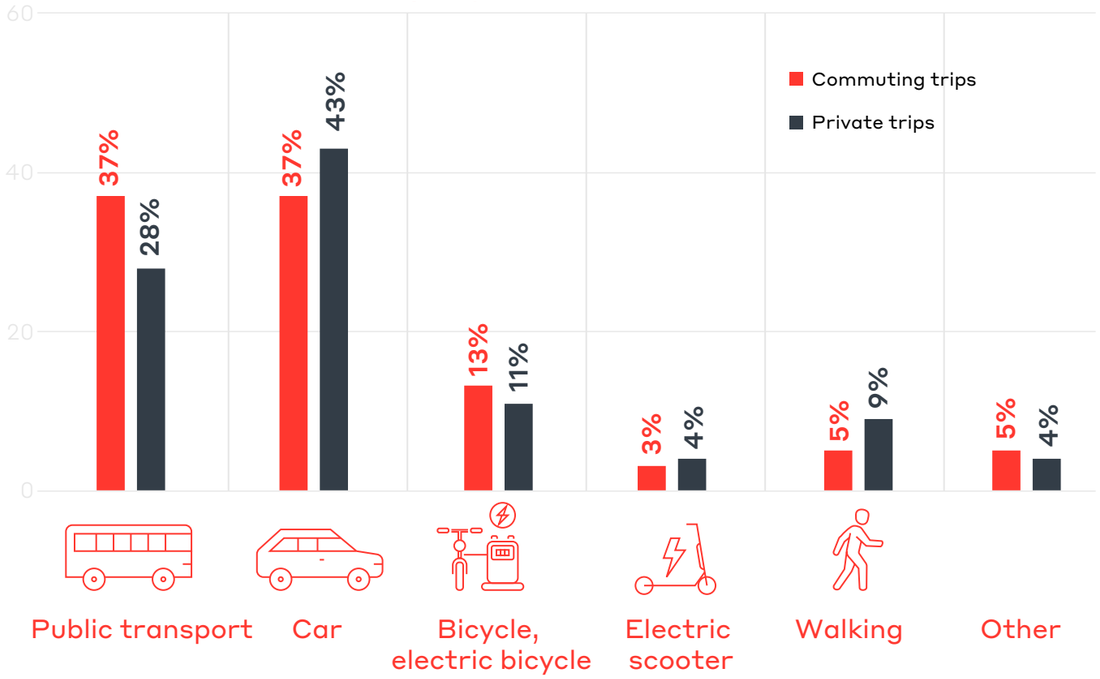
Stockholm:

The public transport capital of the Nordics is struggling

Stockholm has the most sustainable transportation system among the capital regions of the Nordics, with the highest proportion of public transport users and the lowest proportion of car users. This is the case for both commuting and private trips. Stockholm stands out from the other cities in our results, however there is a risk that Sweden's capital could be overtaken. Public transport in Stockholm is still struggling to recover after the pandemic, and we see a decrease in the proportion of people using public transport for private trips. In recent years, several public transport operators in many cities have implemented cutbacks to adapt to both declining passenger numbers and rising costs. More Stockholm residents report experiencing deteriorated service compared to other Nordic capitals. There is a risk that Stockholm could get caught in a downward spiral where lower ridership and service cutbacks continuously follow each other. If Stockholm is to maintain its top position, new measures will be required, and the current trend needs to be reversed.

Overall, residents of Stockholm are relatively satisfied with their commute, and travellers seem to perceive the transportation system as functioning quite well. However, it is worth noting that Stockholm residents express the least satisfaction with their average weekly commute compared to the other capitals.

Most common means of transport, Stockholm



Have you or someone in your household experienced a reduction in public transport services over the past year?

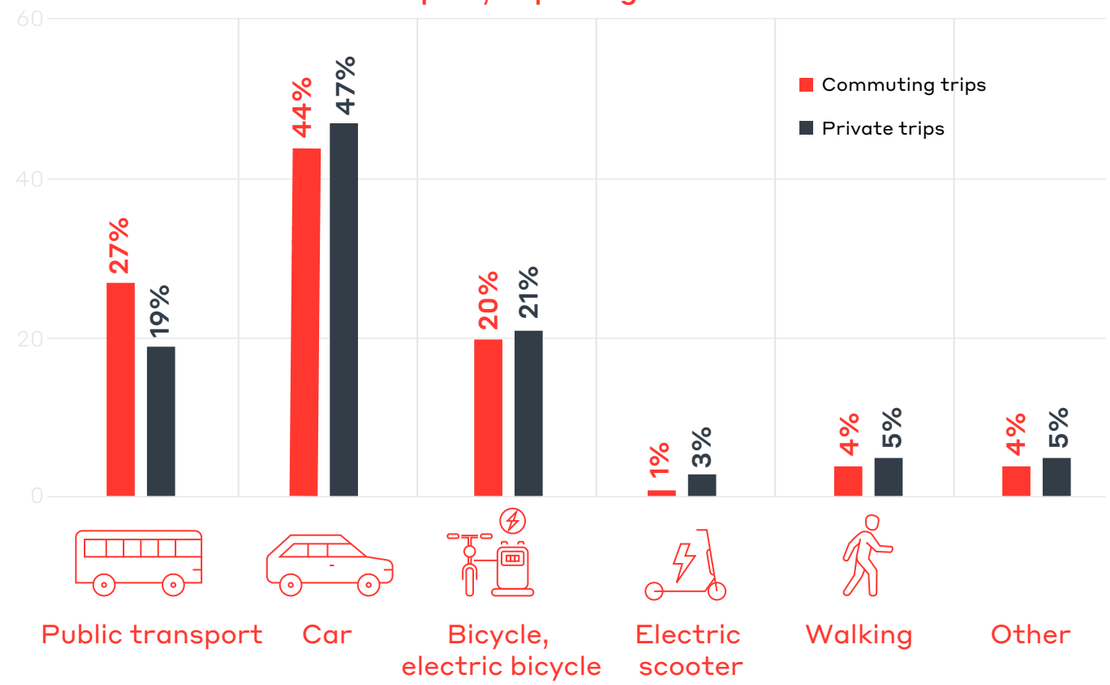
Copenhagen:

The cycling capital of the Nordics pedals less

Our results show that Copenhagen excels in bicycle usage. The proportion of people who use bicycles as their primary means of transport for commuting to work and study, as well as for private trips, far exceeds that of other regions. However, the picture becomes more complex when looking over time. Our results indicate that the proportion of bicycle commuters in the capital region of Copenhagen has decreased compared to 2022. This decline may be partly due to a delayed effect of the Cityringen metro line, which opened at the onset of the pandemic. We see that more people are now choosing public transport, and Copenhagen's public transport share, which was previously significantly lower than that of other Nordic capitals, is now catching up.

While cycling decreases and public transport usage increases, car usage for both commuting and private trips remains as high as before. This development in Copenhagen highlights a major challenge for traffic planners in all cities. Expanding public transport and increasing its share of trips does not necessarily make the transportation system more sustainable. If the increase comes at the expense of cycling, the opposite may be true, both in terms of climate impact and public health.

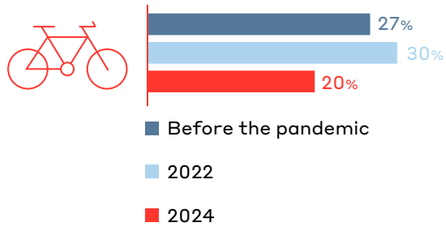
Most common means of transport, Copenhagen



"Expanding public transport and increasing its share of trips does not necessarily make the transportation system more sustainable."

Due to the high share of cyclists, Copenhagen residents stand out as the commuters most affected by the weather. Copenhagen is also the Nordic capital with the lowest proportion of people who report being bothered by queues and traffic congestion.

Bicycle and electric bicycle commuters in Copenhagen



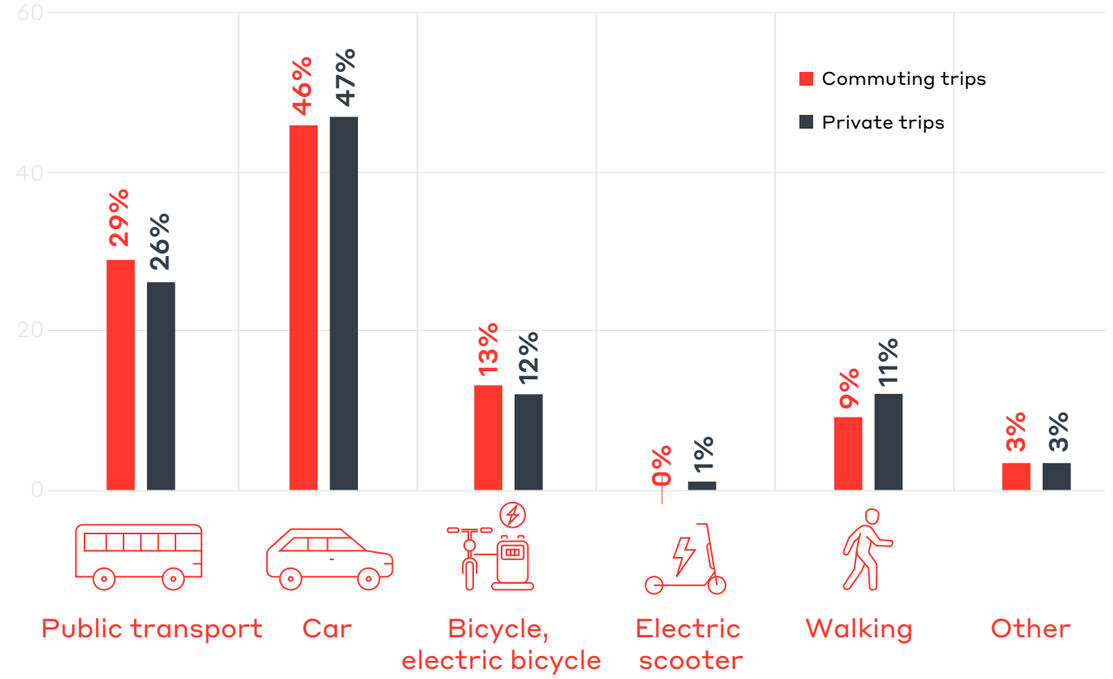
Helsinki:

Nordics' remote-working capital continues to stride ahead

Helsinki stands out in several areas compared to the other Nordic capitals. The Finnish capital is the city where the highest number of people report walking as both their primary and secondary means of transport, for both commuting and private trips. The difference from the other cities is not huge but consistent, indicating that Helsinki has successfully promoted walking through its investments in pedestrian-friendly infrastructure, integration with public transport and mixed land use plans.

Residents of Helsinki work remotely more than anyone else in our survey, which suggests that the habits we observed in our 2022 study have been reinforced. Furthermore, Helsinki is also the capital in our study where respondents report the highest satisfaction with their average weekly commute.

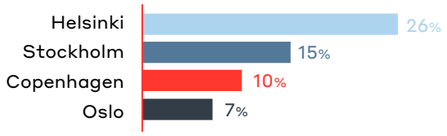
Most common means of transport, Helsinki



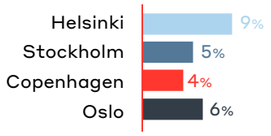
Walking

Most common means of transport for private trips:

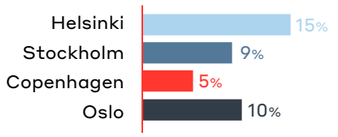
Second most common means of transport for private trips:



Most common means of transport for commuting trips:



Second most common means of transport for commuting trips:



Helsinki also stands out as the capital that has made the least progress in electrification. Residents have the lowest access to electric cars/ plug-in hybrids, e-scooters, e-bikes, and charging infrastructure. Several possible explanations include a relatively slow renewal rate of the vehicle fleets, insufficient and ineffective government incentives, as well as public awareness and attitudes. It is clear that is that the authorities in Finland and Helsinki have a long way to go to achieve the green transition in transportation. Their advantage is that there are many forerunner cities that have paved the way and from which they can adopt the best and most effective measures.

Oslo:

Still the electric transport capital of the Nordics

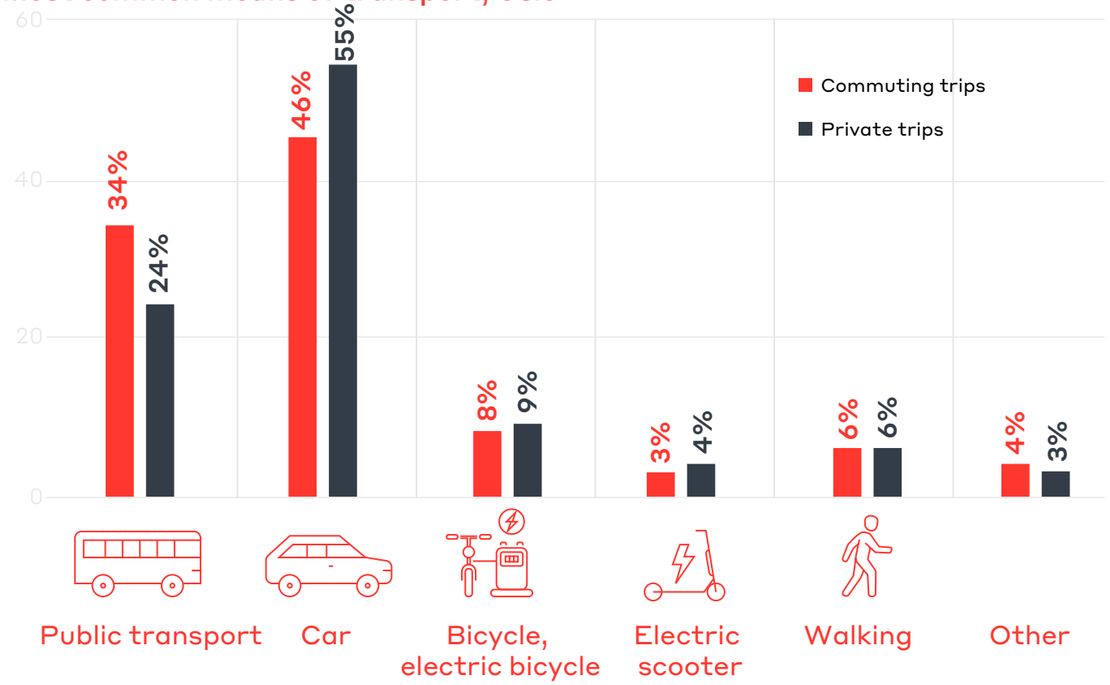
Oslo stands out as a city that embraces new trends faster than other Nordic capitals. The Norwegian capital excels in several areas, notably in electrification and a positive attitude towards innovations like e-scooters, remote working, and remote hub offices.

Oslo has set a benchmark in electrification, with widespread adoption of electric vehicles supported by an extensive network of charging stations. The high use of car-sharing services and bike rental systems in Oslo also sets the city apart from the other capitals. These results seem to reflect the city's commitment to reducing carbon emissions and the effectiveness of government incentives.

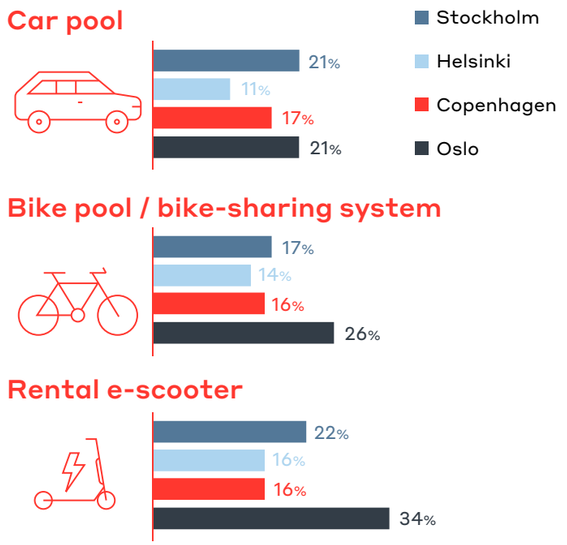
Compared to the other capitals, Oslo residents have a significantly more positive attitude towards the impact of e-scooters on the urban landscape. This is coupled with higher usage of e-scooters in Oslo than in the other cities. Therefore, it is worthwhile for other cities to study Oslo's regulations and see what might work in their own contexts.

Oslo has a relatively high proportion of people working remotely but stands out even more in its desire to increase remote working. The region's residents also show a higher interest in remote hub offices compared to the other cities in our survey.

Most common means of transport, Oslo



Usage of shared transport solutions in the past month



"In Oslo, **54%** are very interested or interested in working from a hub office, compared to 43% on average in the other three capital regions."

About WSP's Nordic mobility study 2024

Method

- Survey via CINT* with a representative sample aged 18–70
- Data collection May and June 2024
- Almost 3000 respondents in the four Nordic capital regions

Sample

- Sweden: 1300 respondents in the Stockholm region (Stockholm county)
- Finland: 600 respondents in the Helsinki region (Uusimaa county)
- Denmark: 550 respondents in the Copenhagen region (Region Hovedstaden)
- Norway: 500 respondents in the Oslo region (Oslo and eight neighboring municipalities**)

* CINT is a marketplace for different panels. The panels in CINT's follow ESOMAR's (European Society for Opinion and Market Research) rules for panel handling. Most of the panels are owned by market research companies, media companies and sports associations, but there are also other types of panel owners. The panel members in the various panels are recruited via various methods, eg via websites, newsletters, telephone surveys, postal surveys and personal surveys. Panel members are compensated for participating in surveys, and compensation methods offered by the various panel owners include gift cards, lottery tickets, charity, surfing data/texts, and money (via PayPal and similar services).
** Municipalities: Asker, Bærum, Lørenskog, Nittedal, Oppegård, Rælingen, Skedsmo, Ski

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