

The mobility study 2022

Travel habits before and after the pandemic

- a comparison of the
Nordic capitals

wsp



About the study

The way we travel, commute and work has changed over the years due to new travel opportunities and goals for greater equality, less emissions and better accessibility. However, when the pandemic hit the change happened lightning fast. Since then, new habits have taken hold and there are indications that some may persist even after the pandemic.

WSP Sweden has continuously conducted surveys during the pandemic to find out how traffic and commuting have been affected by restrictions, how people have changed their travel habits and how they will travel when the pandemic has subsided. This year the study has been expanded to include the Nordic capital regions. This allows us to analyze similarities and differences in the Nordic countries, which will hopefully provide valuable knowledge in order to accelerate the change to a more transport effective society. The survey includes around 2 500 respondents from Stockholm in Sweden, Oslo in Norway, Copenhagen in Denmark and Helsinki in Finland.

Consequences of the pandemic on commuting habits from a Nordic perspective Survey via CINT* with a representative sample aged 18–70

- Sweden: 1000 respondents in the Stockholm region (Stockholm county)
- Finland: 500 respondents in the Helsinki region
- Denmark: 500 respondents in the Copenhagen region
- Norway: 500 respondents in the Oslo region
- Data collection June 2022

*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).



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Conclusion of the results

Even if different methods and regulations were used to handle the pandemic in each Nordic country, most of the results point in the same direction. In general, the Nordic countries have developed similar behaviors regarding different means of transportation and mobility in general.

However, some interesting differences and country specific traits could still be found among the answers. For example, the Finnish people have certainly grown accustomed to the post-pandemic digital workspace and the structural change in Helsinki tends to be more comprehensive as things have not returned to the way it was before the pandemic. If this is just an indication that recovery is slower in Finland remains to be seen. But if it is a lasting phenomenon, Finland and Helsinki will be an interesting case-study in researching the effects of increased remote work on

the transport system, if it is a desirable development and how/why it occurs.

Norway is on its way to electrifying the transport sector. To fully be a transport effective society the share of travel by car still needs to be kept to a minimum to avoid the drawbacks of car usage such as congestion and the fact that cars have high demand on land use. Still, the electrification is mainly positive, reducing GHG-emissions, and the other Nordic countries have some catching up to do. But to avoid an even higher load on metropolitan roads, it is crucial to strengthen the control measures that improve the relative attractiveness of sustainable means of transport in terms of travel time, convenience and travel cost. The entire toolbox is needed if we are to reach the climate goals, such as parking fees, congestion charges, redistribution of street space, adjustment of speed limits and prioritization of traffic signals.





With innovative solutions to enhance the usage of eco-friendly means of transport, Denmark once again claimed the well-deserved title "Top Dog" when it comes to bicycle traffic. Almost every fourth person in the Copenhagen capital region commutes by bicycle and not only is it beneficial from a zero-emission perspective but also regarding reduced congestion in traffic and to boost people's health. This should be enough motivation to encourage other countries to follow and increase their bicycle traffic. Find new smart and innovative ways to incorporate the bike in the transport system to enhance efficiency.

Being the largest urban area of the Nordic countries, Stockholm still have the largest share of public transport commuters. To provide transport services that cater to the daily needs of the population is vital to reduce CO2 emissions generated from the transport sector. However, this brings high demand on both the spread and reach of the network as well as on the quality and security of it. Stockholm might be on top regarding the use of public transport as for now, but according to the survey it seems that some of the other Nordic capitals are closing in.

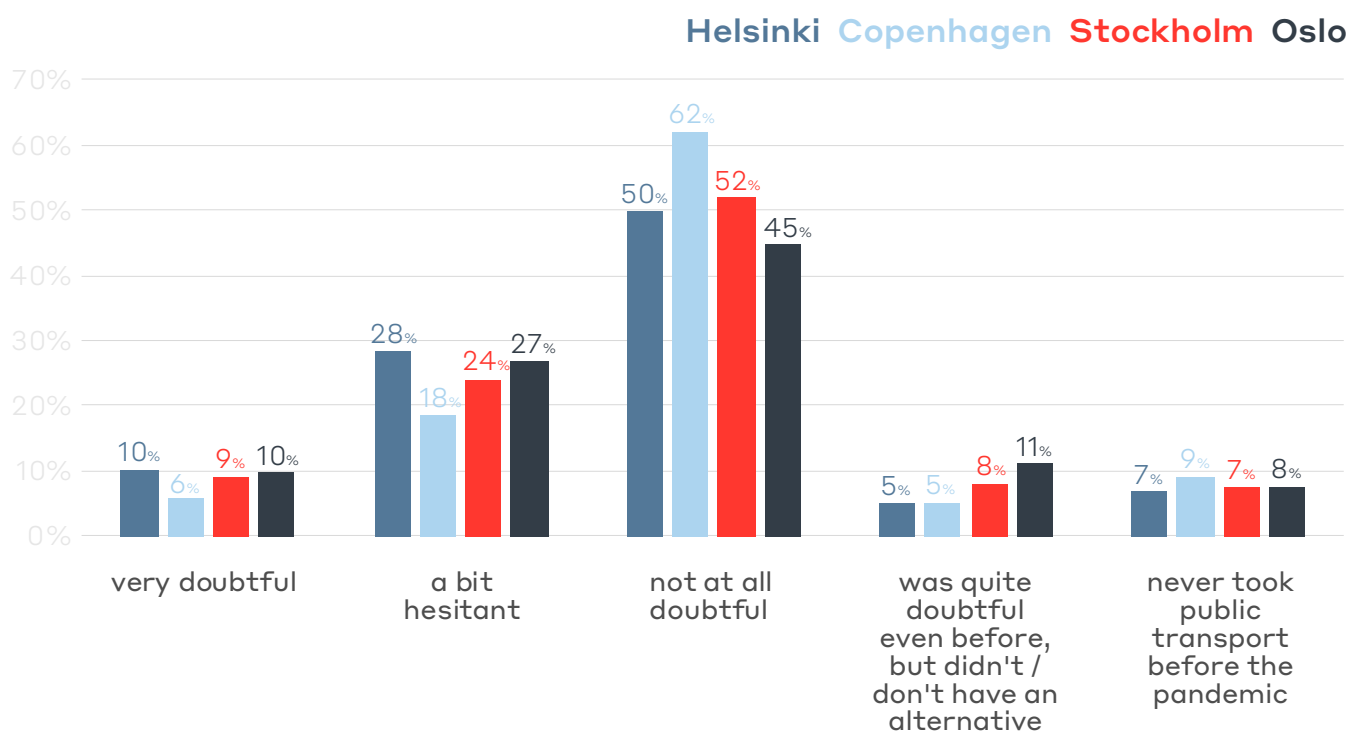
The findings in this report will hopefully bring new valuable insights regarding mobility and transportation in some of the largest Nordic metropolitan areas. To enable better use of the collected data annual surveys based on the same questions would indeed be fruitful and contribute to increased transport efficiency in our Nordic countries.

Attitudes regarding public transportation in 2022

If public transport is to recover from the drop, people will simply have to regain their interest in it and need for it. Yet, some people feel uncertain to use public transport in the same extent as before the pandemic. However, it remains unclear whether the cause of their hesitation is the general risk of infection, delays or prices. There is still hope of a steady

recovery as half of the respondents stated that they were not at all doubtful when it comes to public transport. Some Nordic differences are found among the results with respondents in Denmark being least skeptical with 62% not doubtful at all and only 18% that are a little doubtful.

Now that the pandemic has subsided, how hesitant are you about taking public transport in the same way and to the same extent as before the pandemic?



Commuting in 2022 - a drop in public transport

A prominent trend regarding commuting which applies to all cities is the drop in usage of public transport. In Stockholm and Oslo this drop is as large as 10% and 11% while in Finland it was 4%. Noted is also that the use of eco-friendly means of transport such as bicycle or walking increased in general.

Since the number of commuting trips seems to have decreased because of increased share of work from home, an increase in the share of bicycle trips does not necessarily mean more trips are made in total. Thus, the decrease in the share of public transport is even more severe in terms of the number of trips. Other studies show that the public transport sector is recovering but the number of travellers are not yet back to the same levels as before the pandemic.¹



¹WSP Sweden, Den stora mobilitetsrapporten 2022

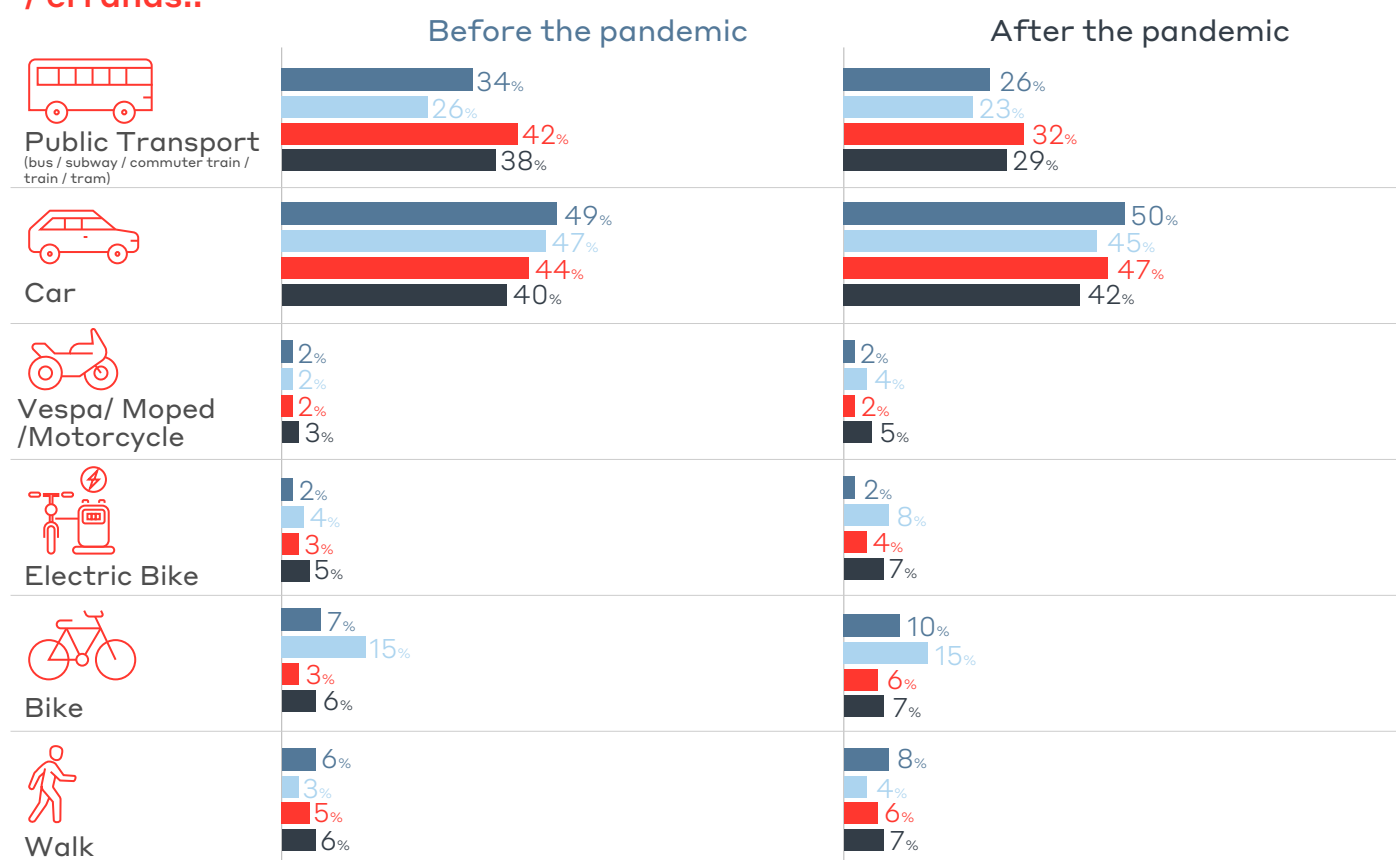
Private trips opt out on public transport

The trend of deselecting public transport after the pandemic is in fact relevant also for private trips and errands. This includes the increase in eco-friendly means of transportation. As expected, the use of cars for private trips is higher than for commuting in all regions both before and after the pandemic. This is probably due to the flexibility that a car provides since private trips usually are more dynamic in contrast to commuting where the

journey goes regularly from point A to point B. It could also be because private trips for example include grocery shopping in which case a car comes in handy.

The increased interest in outdoor life, sports and home stay vacations during the pandemic doesn't seem to have affected the way we travel in our free time to any greater extent, at least not when it comes to the main mean of transportation.

Which means of transport did / do you most often use for private trips / errands..



Helsinki Copenhagen Stockholm Oslo

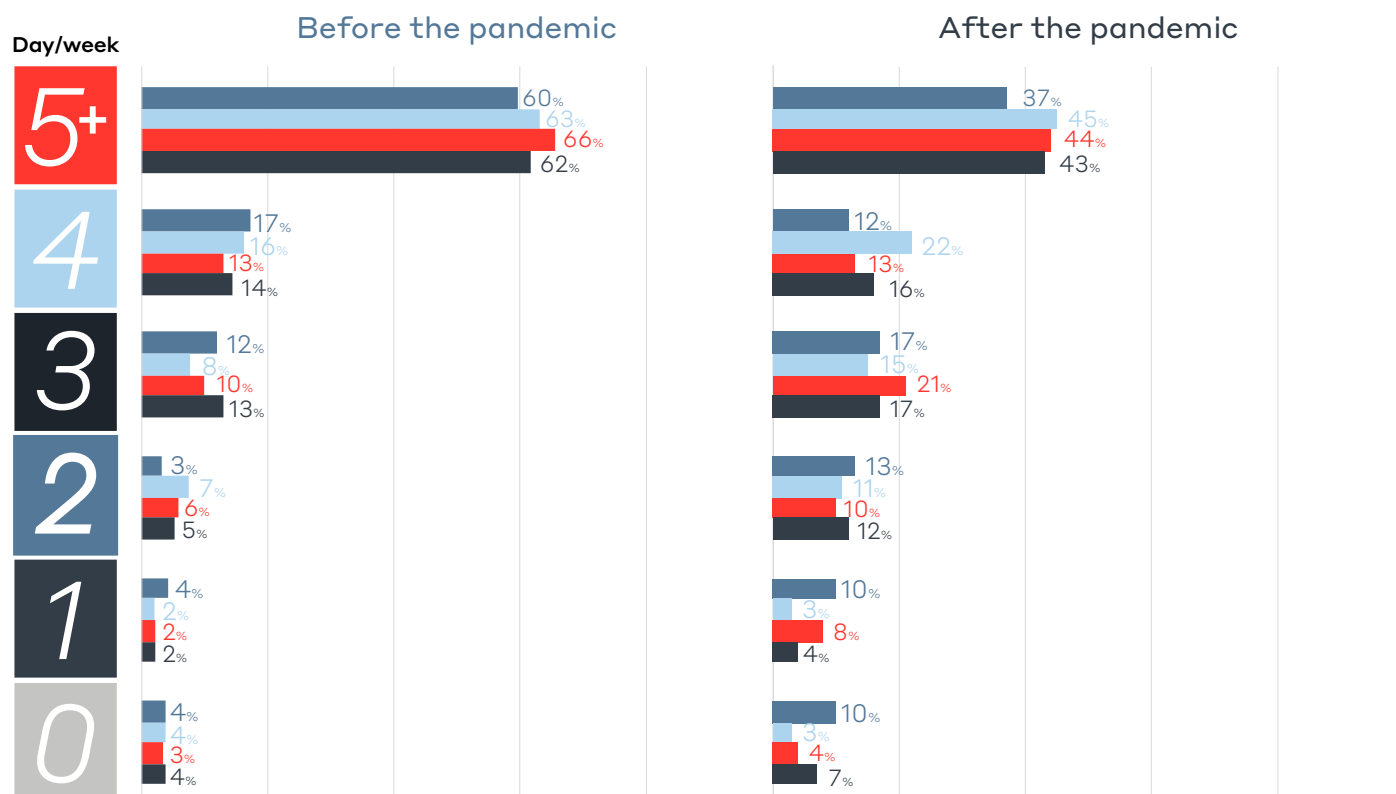
The new normal is a balanced workweek

We are living in an exciting new digital era, which involves new mobility patterns and workweek habits. The results of the mobility study of 2022 strongly suggests that the pandemic has had a permanent impact and effect on how people in some of the largest Nordic metropolitan areas nowadays travel, commute and work compared to before. This new way of living could be referred to as the new normal. People seem to appreciate a more flexible work-style of being able to work from home at least some days per week.

In general, the share of people working full weeks from the office has decreased by 20% and the share of those who work 2-3 days from home has increased. Whether this depends on the business structure, avoiding long commutes or any other factors remains unclear. About 40 to 50 percent of the respondents do not have the opportunity to work from home. This shows us that most people with the possibility to work from home utilize this opportunity at least once a week.

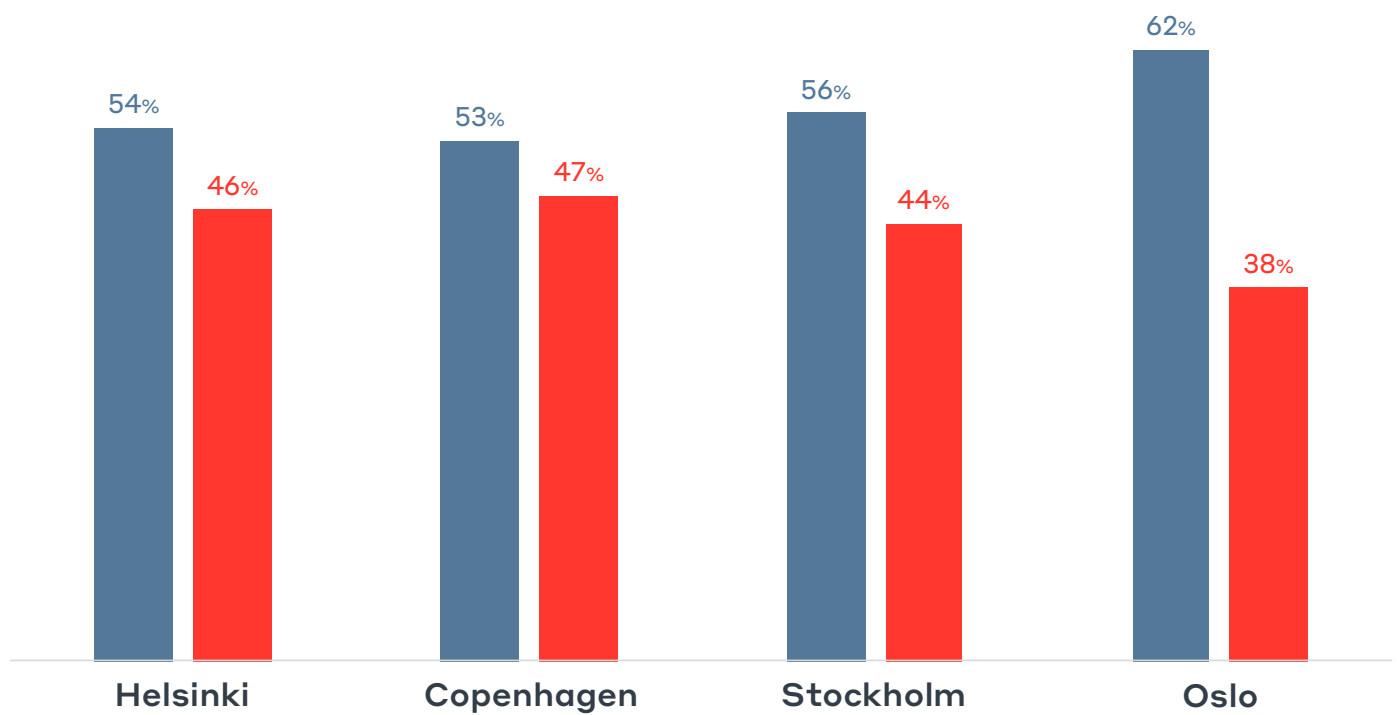
How often did/do you travel to and from work/studies...

Helsinki Copenhagen Stockholm Oslo



Do you have the possibility to work remotely?

■ Yes ■ No



Digital meetings

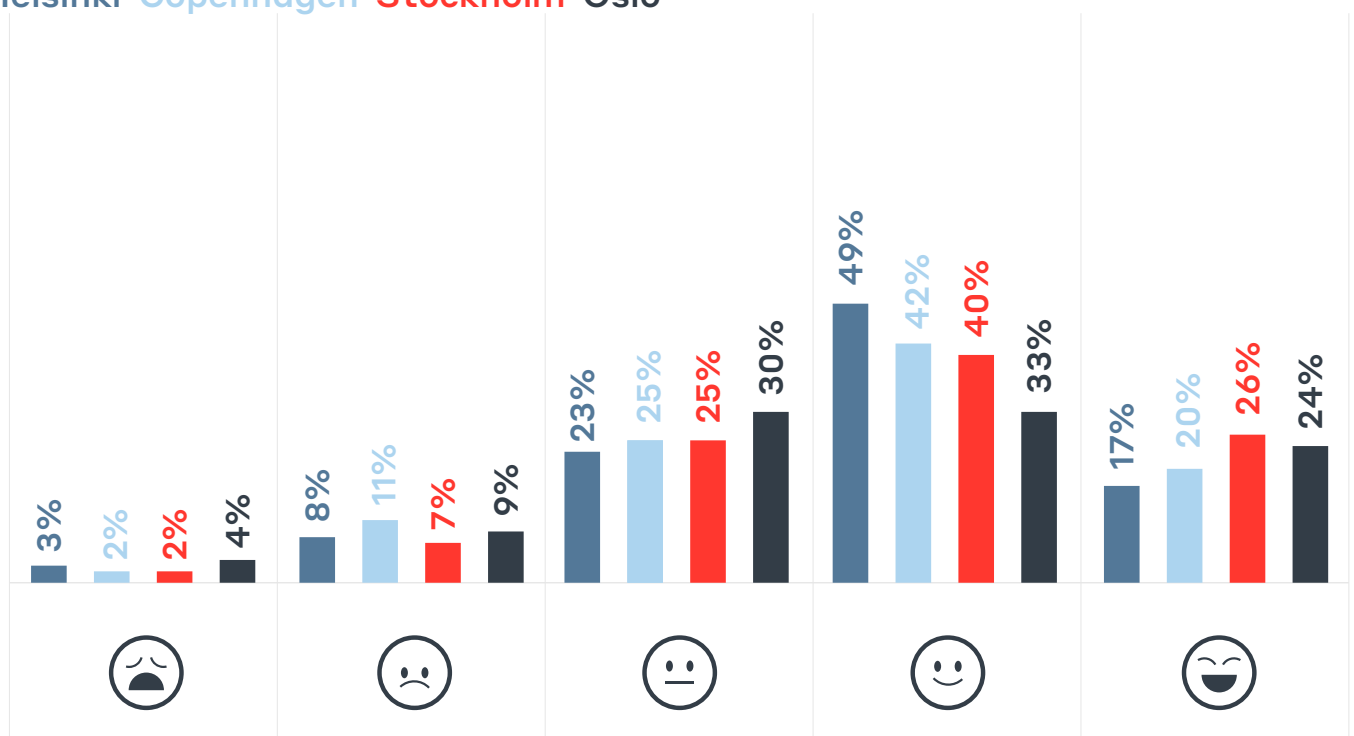
There is a possibility that smart mobility and digital services can contribute to a reduction in travel if the digital alternatives are attractive and well-functioning. However, more studies on this subject are needed to understand how big the potential is and how it may develop in the long run.

of technology, 50-60% with the quality of work and around 40% are content with the digital meetings in terms of the social aspects. These trends apply to all cities.

WSP's survey indicates that all countries, in general, seem quite satisfied with digital meetings. Between 60-70% are "happy" or "really happy" with how it works in terms

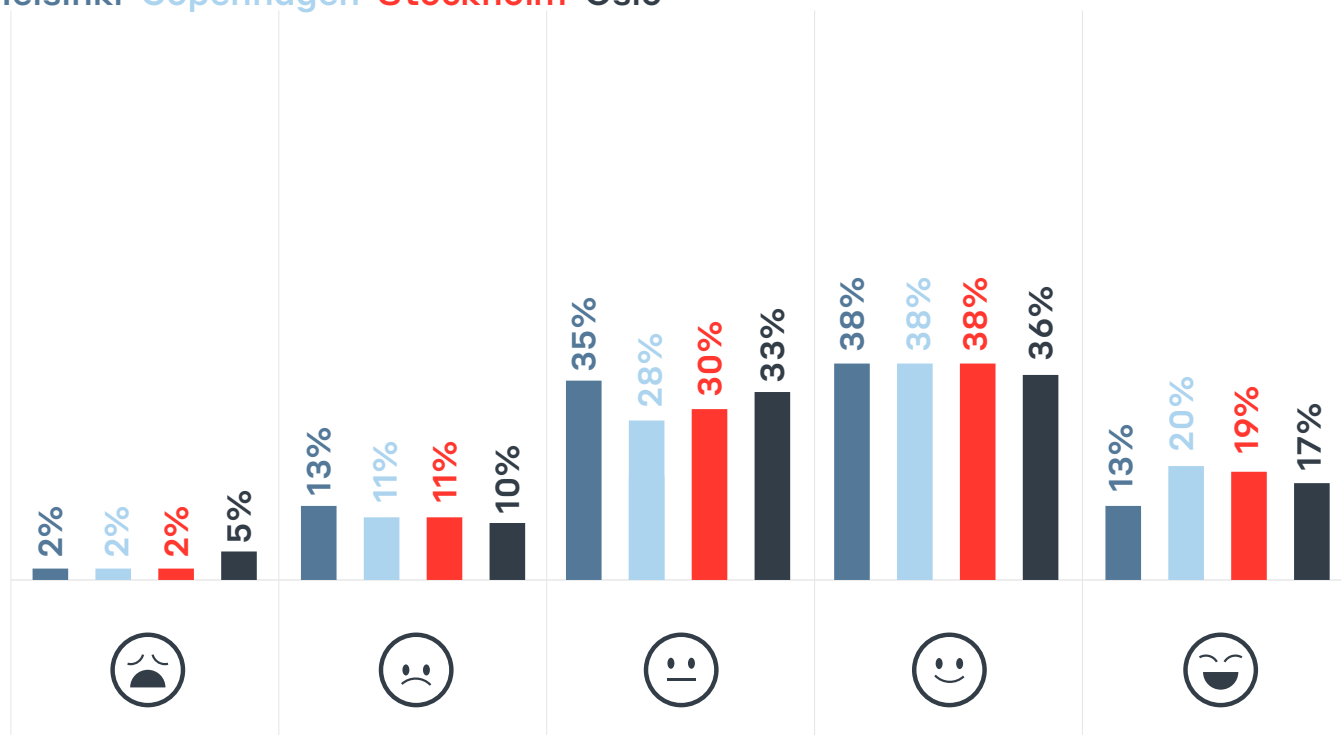
How do you feel that the digital work meetings work in terms of
the technology (connection, stability, document sharing etc.)

Helsinki Copenhagen Stockholm Oslo



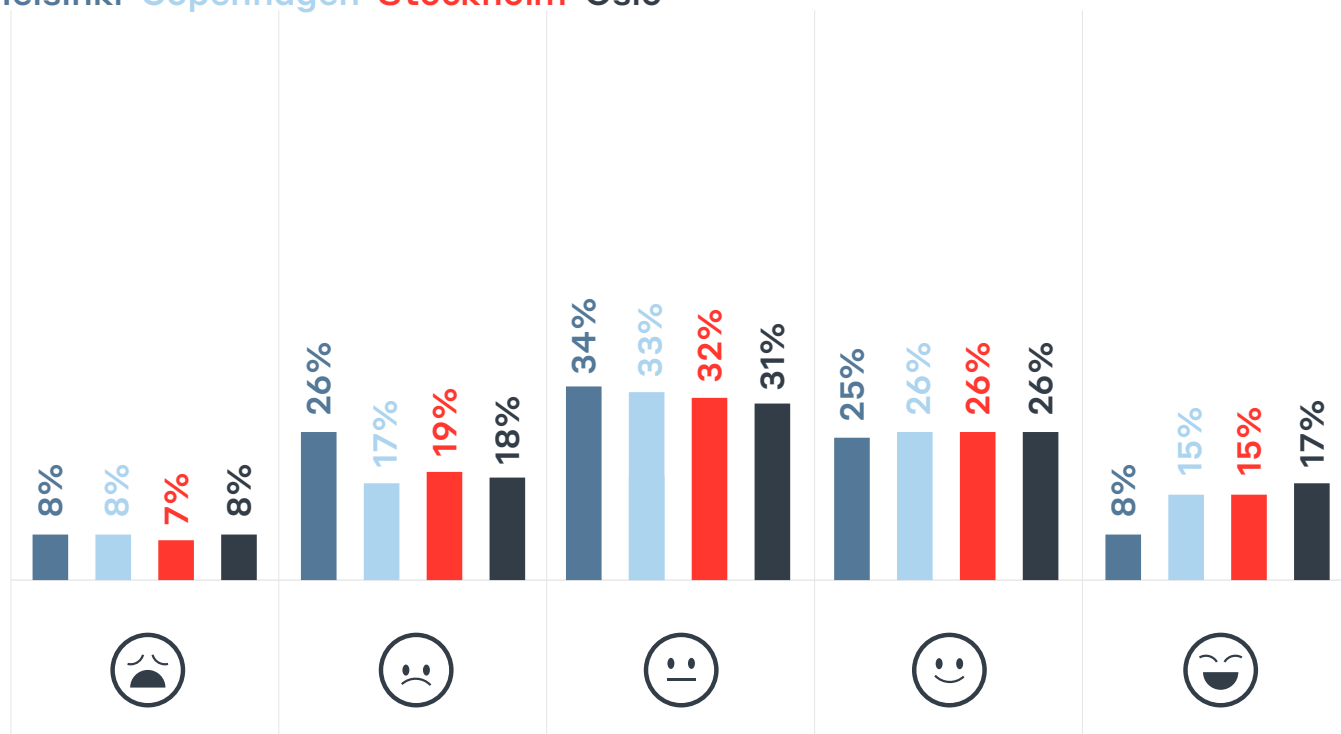
workwise (discussion, creativity etc.)

Helsinki Copenhagen Stockholm Oslo



socially (togetherness, personal exchange etc.)

Helsinki Copenhagen Stockholm Oslo



Co-working spaces

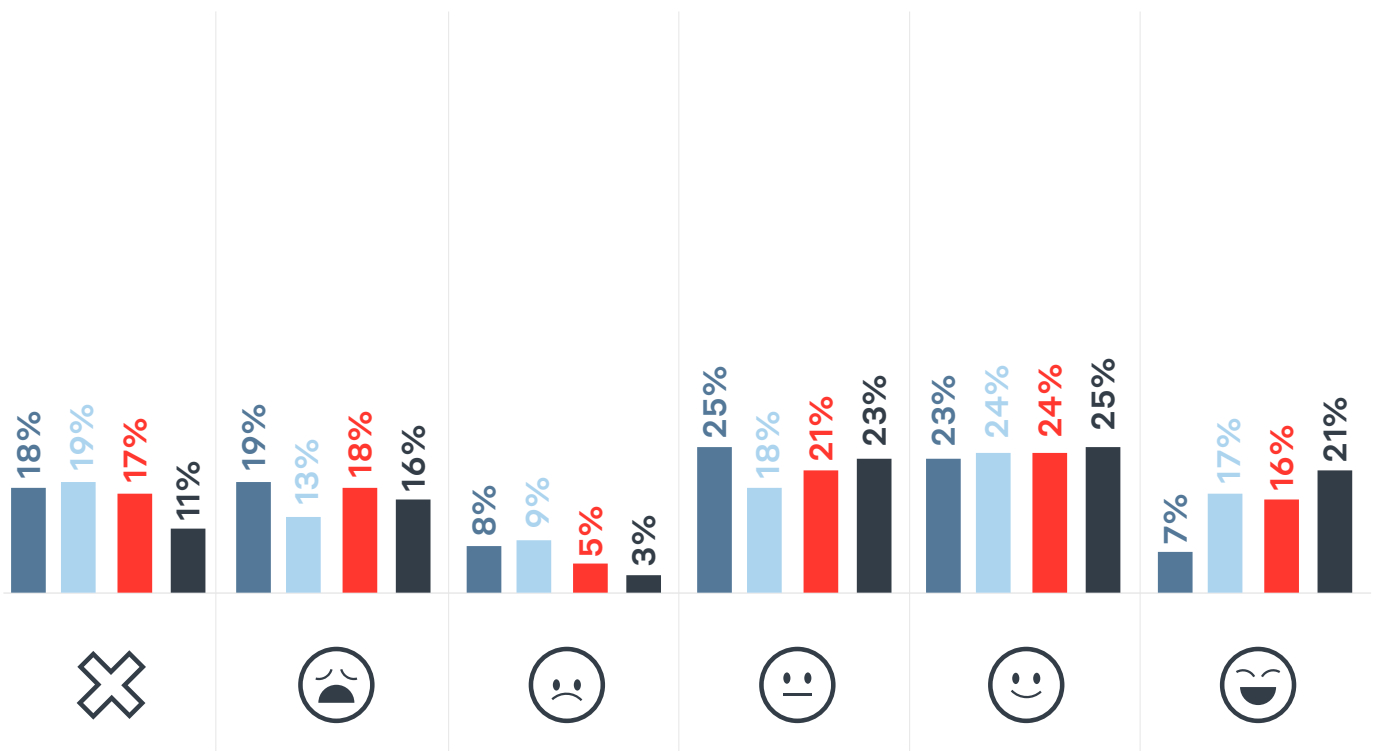
According to studies, a combination of co-working spaces and sustainable transport alternatives could have positive effects in reducing long-distance commuting and avoiding the drawbacks of working from home.²

Around 40% of the respondents in each region stated that they were either interested or really interested in having the possibility to work from a hub office in their local area. The Norwegian

respondents were most enthusiastic about this as 47% of the respondents were to some extent interested, compared to only 30% in Finland. Even if the survey shows some potential in co-working space, it doesn't answer the question whether the hub offices will experience an actual breakthrough or if they will have any effects on reducing transport. It is possible that the users simply exchange a day working from home for a day at the hub office with limited sustainability effect.

How interested would you be in having the opportunity to work from a hub office or co-working space in your local area?

Helsinki Copenhagen Stockholm Oslo



²Vaddadi, Bhavana; Ringenson, Tina; Sjöman, Martin; Hesselgren, Mia; Kramers, Anna (2022), Do they work? Exploring possible potentials of neighbourhood Telecommuting centres in supporting sustainable travel

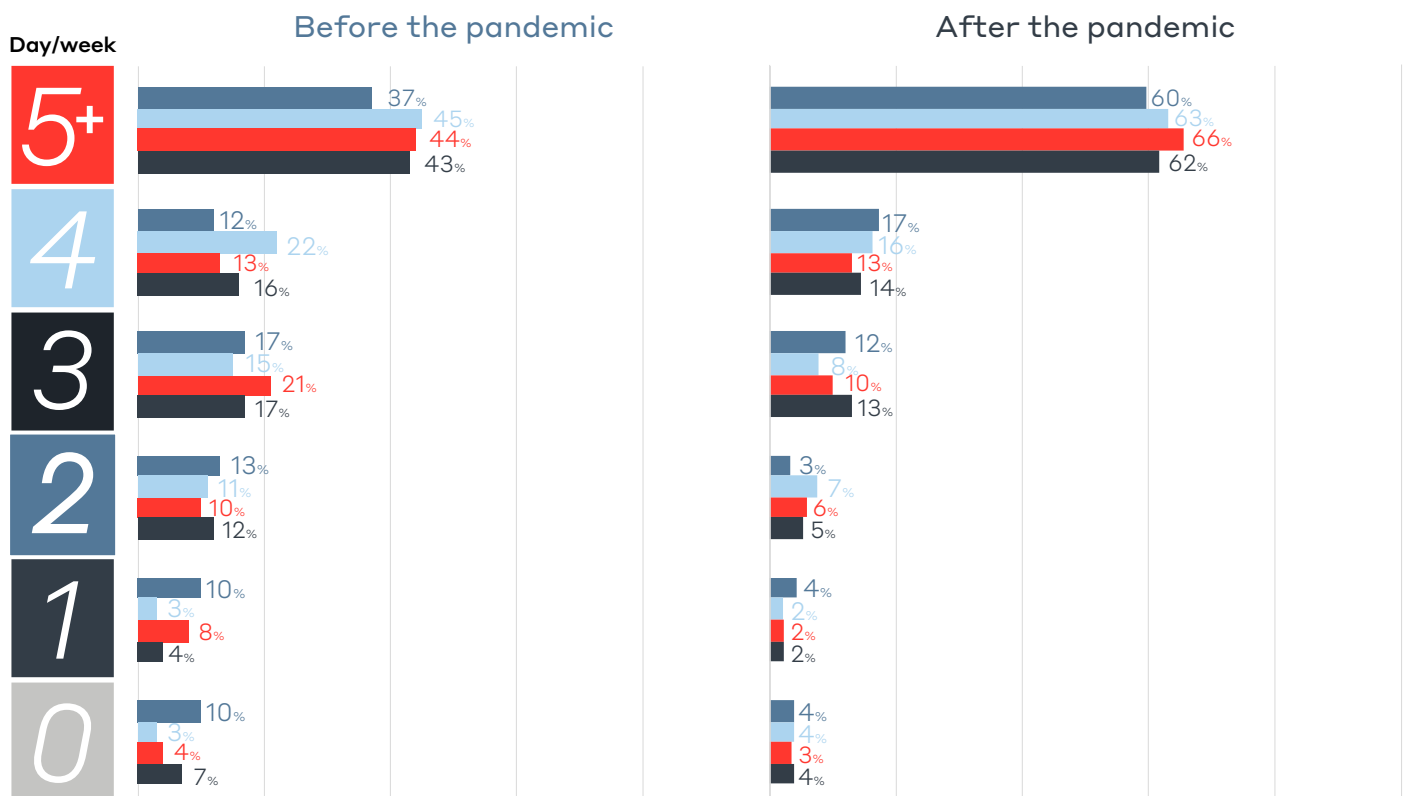
Helsinki – the capital of digital work space

According to the survey a vast majority of the respondents in Helsinki do to in some extent work from home in 2022. A whopping 10% stated that they never travel to the office, which is to be compared with 4% before the pandemic. It surely seems like the pandemic speeded up the development of a digital workspace everywhere and the

Finnish people seem to enjoy and embrace the transition to a large extent. The result from the study is in line with other surveys that also point to the fact that the Finnish people for instance adjusted better than average to the new work-life conditions during the pandemic and at the same time remained productive and motivated.³

How often did/do you travel to and from work/studies...

Helsinki Copenhagen Stockholm Oslo



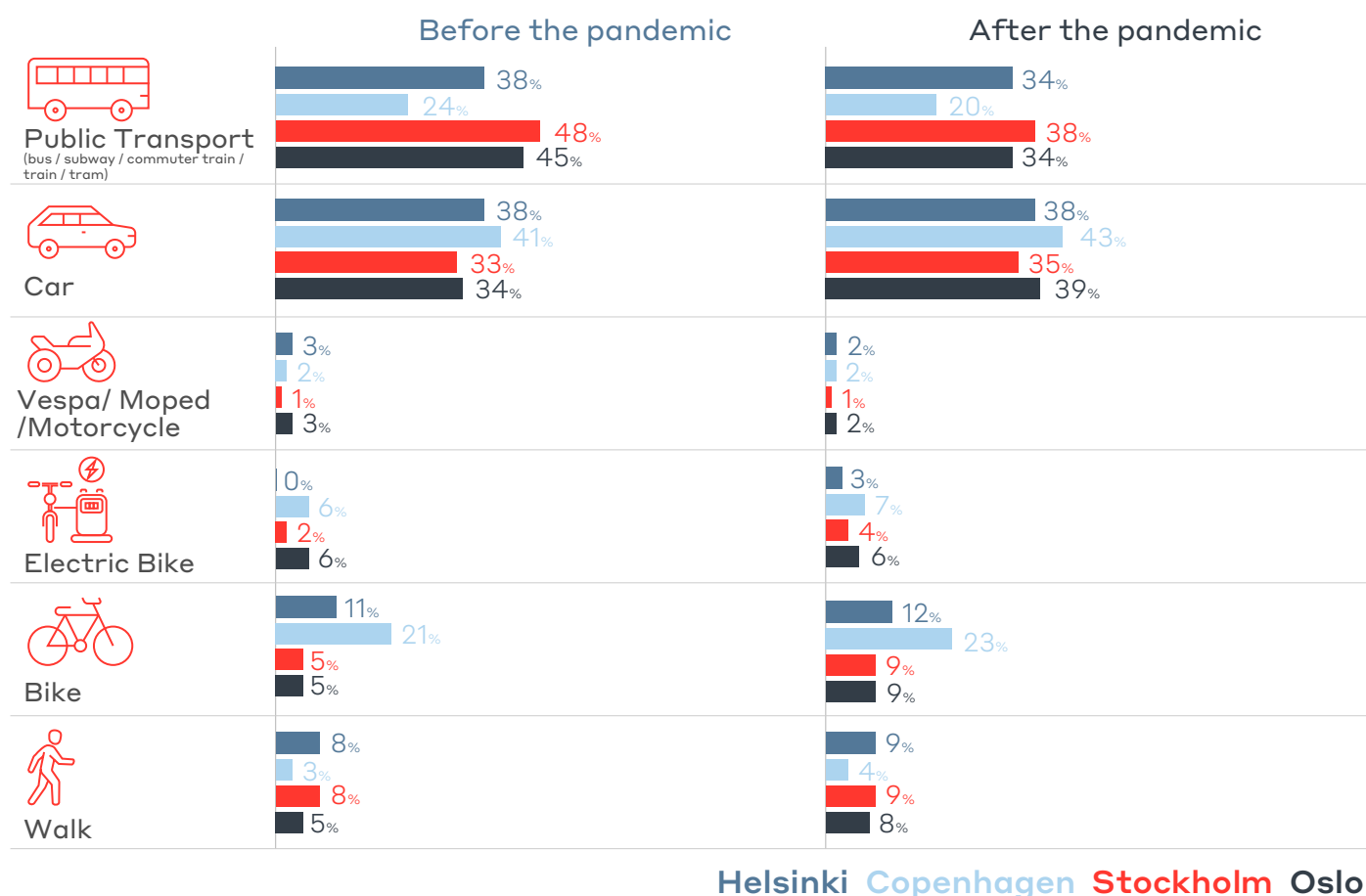
³ Helsinki Times, 23 August 2021, <https://www.helsinkitimes.fi/finland/finland-news/domestic/19817-finnns-more-willing-to-continue-remote-work-than-people-in-other-countries.html>

Stockholm - most persistent users of public transport

Stockholm is embedded in a robust and widespread system of different public means of transportation, used by over 780 000 people each day.⁶ According to the study, commuting by public transport was and still is the most common way to travel in Stockholm also in comparison to the other Nordic regions. A possible

explanation could be the metro's size and attractiveness, the advantages of which are not easily ignored. However, even if the system is constantly growing, the gap to the other regions according to the results from the study is not as large as it once was and especially Oslo and Helsinki are not far behind.

Your most common means of transport for traveling to and from work/studies...



⁶ Region Stockholm, About Region Stockholm – Public transport, <https://www.regionstockholm.se/om-regionstockholm/Information-in-English1/Public-transport/>

Copenhagen – the cycling and car capital of the Nordics

It does not come to a surprise when the results point out Copenhagen as the city with the largest share of bicycle commuters, since it is often described as one of the most bike-friendly cities in the world. According to the result an astonishing 23% commute by bike in Copenhagen capital region which is more than the share commuting by public transport. A potential explanation for this could be the cycle superhighways in Copenhagen which improve the accessibility and binds the city together in a smart way. Not only are bicycles emission free, but they also prevent congestion in traffic and reduce the risk of various diseases.⁵

Perhaps to some extent the cycle highways replace the need for buses and trains and thereby gain travelers at the expense of public transport. The Copenhagen capital region also has a quite high share of people commuting by car. In fact, it is the highest among the capital regions. This is probably due to the geography and city structure. The Capital region is large and people living outside the city need a car for commuting because public transport is not the most attractive, especially for cross-connections. Due to the differences in geography, comparisons between the regions should be interpreted cautiously.



⁵Cycling Embassy of Denmark, Cycle Superhighways, <https://cyclingsolutions.info/member/cycle-superhighways/>

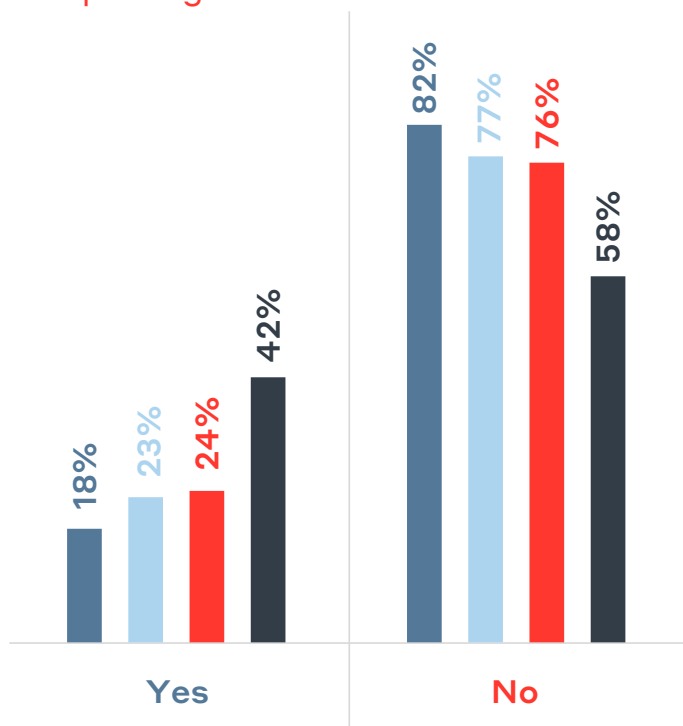
Oslo – a variety of ecofriendly solutions

The people of Oslo travel more eco-friendly, not only in terms of access to and use of electrical means of transport, but also through an extensive car- and bike sharing scheme. An explanation for this might be that the price of purchasing a new car is much higher in Norway in comparison to Sweden and Finland, increasing the incentives of car sharing⁶. Since a larger part of car-sharing companies are focusing on a fully electric car fleet, access to charging infrastructure is key. Since electric cars are more common

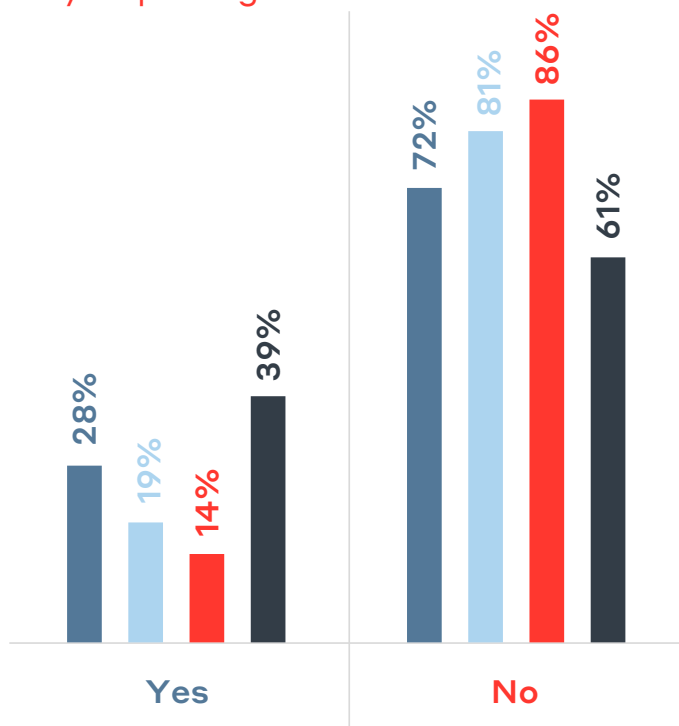
in Norway this may have paved the way for the spread of car sharing services. Also, the cycling culture has grown deep in Norway throughout the years, thus bike sharing has become a natural part of the transportation system.⁷ Much due to the city's bike sharing service, the cycling traffic has increased by more than 75% in Oslo since 2015.⁸ This indicates a widespread distribution and explains the availability, which may inspire other cities to follow in their footsteps.

Do you have access to....?

Car pooling



Bicycle pooling



Helsinki Copenhagen Stockholm Oslo

⁶ Trafikverket, 2019. Delad mobilitet i Norden – utmaningar och möjliga lösningar

⁷ The Local, 16 May 2019, Why Norway's bike-sharing schemes outperform those in Sweden and Denmark, <https://www.thelocal.no/20190516/why-norways-bike-sharing-schemes-outperform-those-in-sweden-and-denmark/>

⁸ Micromobility Report, 9 February 2021, Oslo Gets Serious About Micromobility, <https://micromobilityreport.com.au/infrastructure/all-other-infrastructure/oslo-gets-serious-about-micromobility/>

Will the rising energy prices effect the switch to an electric car fleet?

To decrease the emissions from transport, the fuel and energy source of private cars plays an important role. Almost half of the respondents in each city-region have no plans of getting a new car. But, among those who do a vast majority is considering a fully electric or plug-in hybrid car. As much as 50% of the respondents in Oslo stated that they are planning on getting either a fully electrical or plug-in hybrid within the next three years, while in Copenhagen almost 60% were not planning to buy a new car of any type. According to this study it doesn't seem like the other countries will catch up with Norway anytime soon.

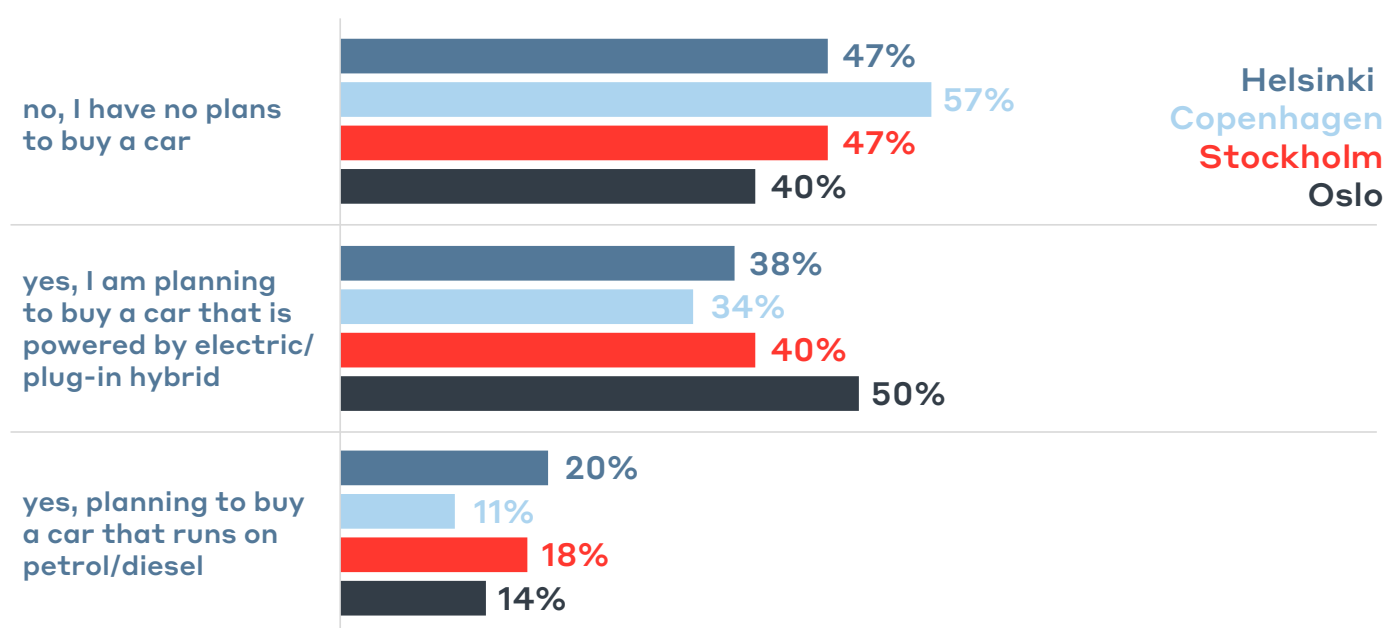
There are also some concerns about how the rising energy prices will affect the switch from conventional fuels to electric powertrains. It is still cheaper to charge

an electric car than to refuel with petrol or diesel, which have also been subject to rising prices. Nevertheless, the uncertainty about energy prices may still influence people considering buying an electric car.

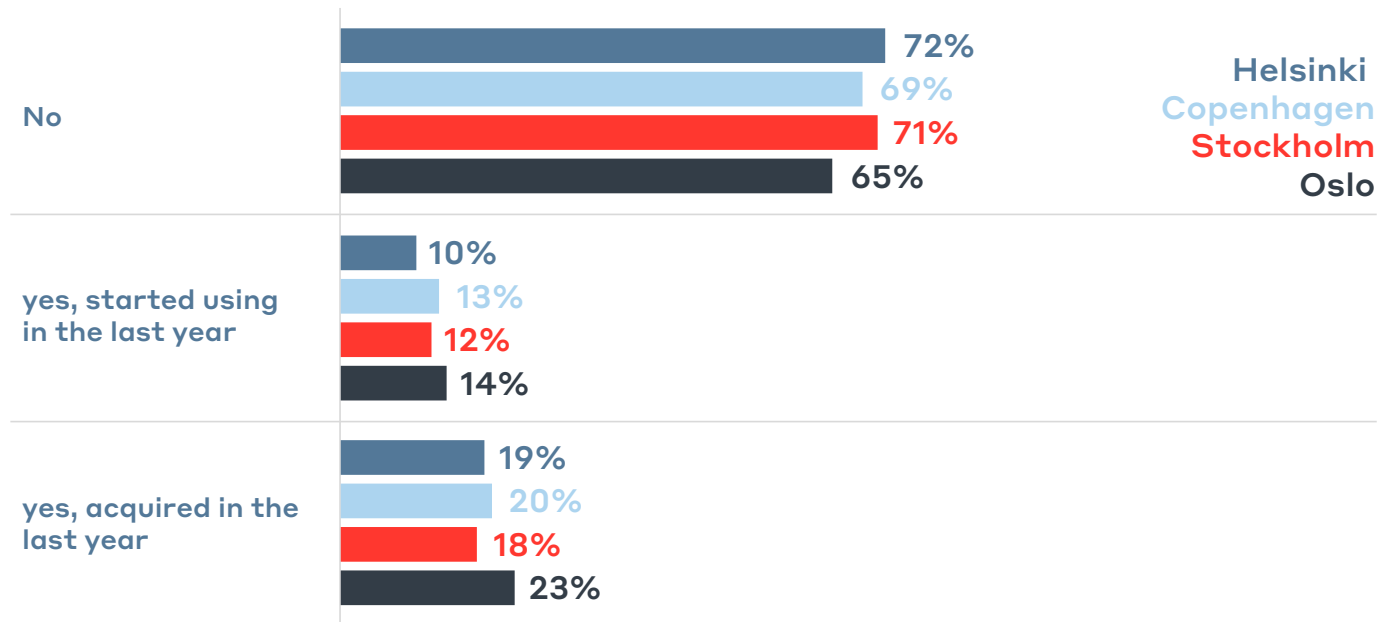
In the Nordic countries around 20 % have acquired a petrol or diesel car within the last year. So, even if the electric future is up and coming, the share of people buying a petrol or diesel car is still higher in all regions according to our survey, but this can also include secondhand cars.

When examining the official statistics of first-time registered passenger cars, diesel and petrol cars are still more common than electric/plug-in hybrids in Denmark and Finland. In Sweden, the petrol and diesel cars are just slightly less popular when buying a brand-new car.⁹

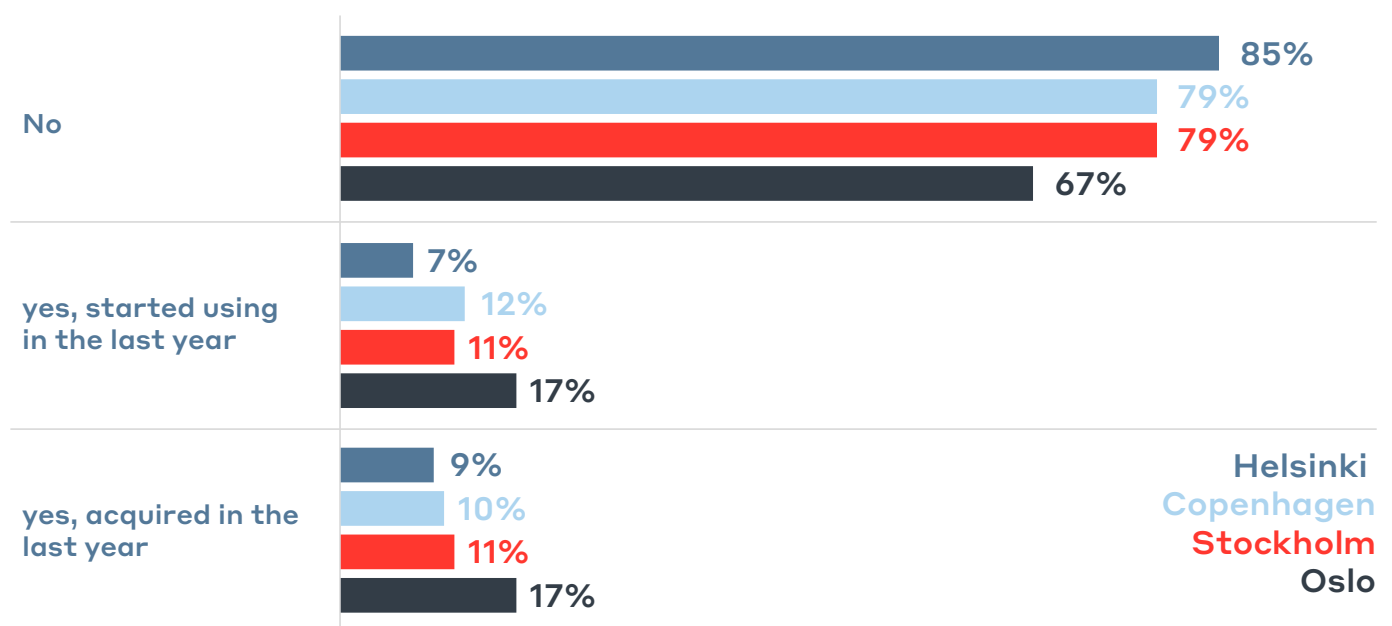
Do you have plans to buy a car within the next three years, and if so, what kind of car?



In the past year, have you acquired and/or started using a passenger car **gasoline-/diesel powered?**



In the past year, have you acquired and/or started using a passenger car **electric powered/charging hybrid**



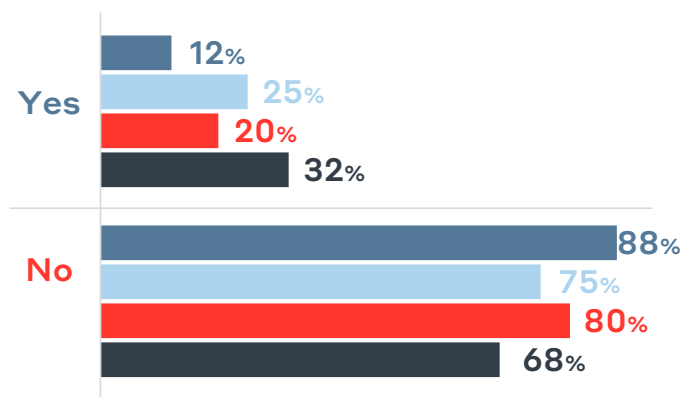
Electrification and shared mobility

It is widely known that Norway has taken big steps in the electrification of the transport sector, mainly due to extensive subsidies. This is also shown in our study as Oslo stands out, not only when it comes to access to electric cars but in every aspect of electrified means of transportation. A close second place in the electrification race is Stockholm, where the share of people with access to electric cars and to charging is slightly higher than in Copenhagen and Helsinki.

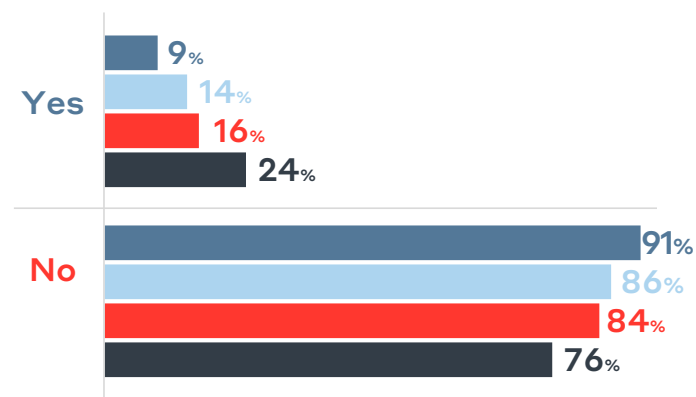
The boom of rental systems for electric scooters seems to have increased the interest in also owning an electric scooter as 16% of the respondents have access to their own. Is it possible that electric scooters will be a more common sight in our cities than electric bikes? However, the share of people that uses an electric scooter as their main mean of transportation is still low.



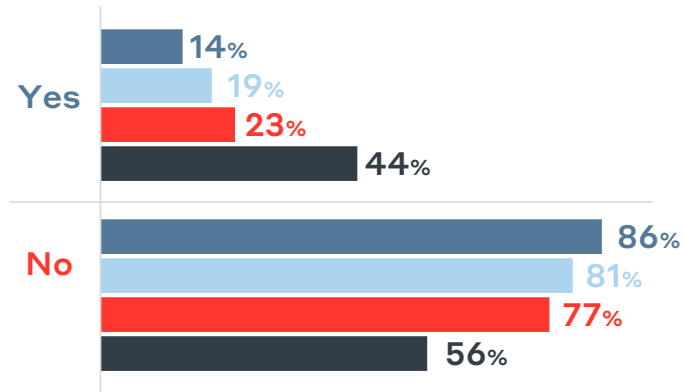
Do you have access to
electric bike?



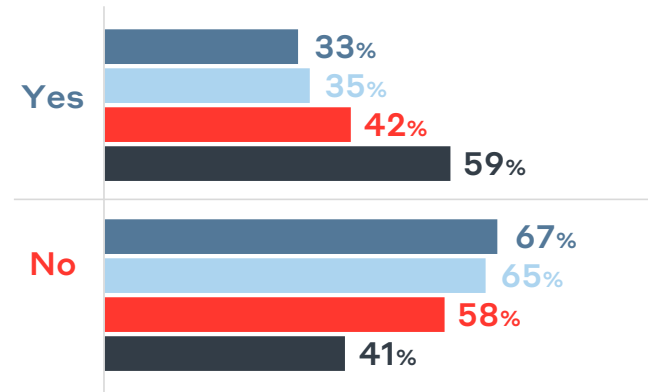
own electric scooter?



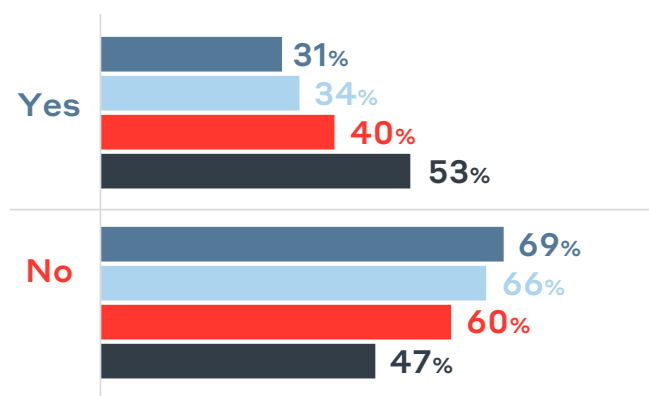
passenger car - fully electric or
plug-in hybrid?



charge an electric vehicle near
your home?



charge an electric vehicle near your
workplace?



Helsinki Copenhagen Stockholm Oslo

Has life returned to how it was?

The results show that the pandemic has changed the way we travel regardless of the purpose of the trips and that this will be for some time to come. Business trips are the type of travel that have not returned to the same extent as private trips or commuting. 43% answered that their business travelling is back to what it was before the pandemic in comparison to 52% when it comes to

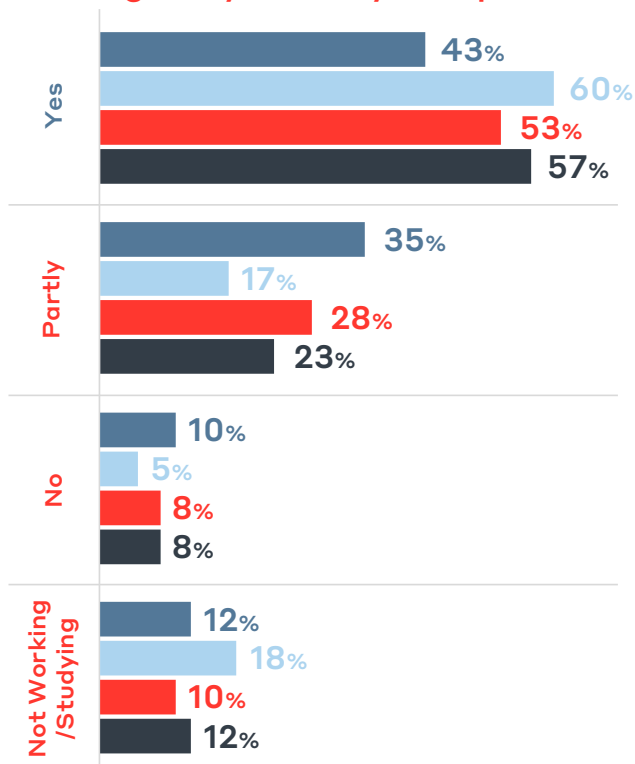
commuting. The fact that we have become more accustomed to digital meetings is probably a major explanation for this.

Helsinki stands out as the region where the daily life and travel patterns haven't returned to the same extent. This is in line with the previous findings that the Finns are working more from home in comparison to the other city regions.

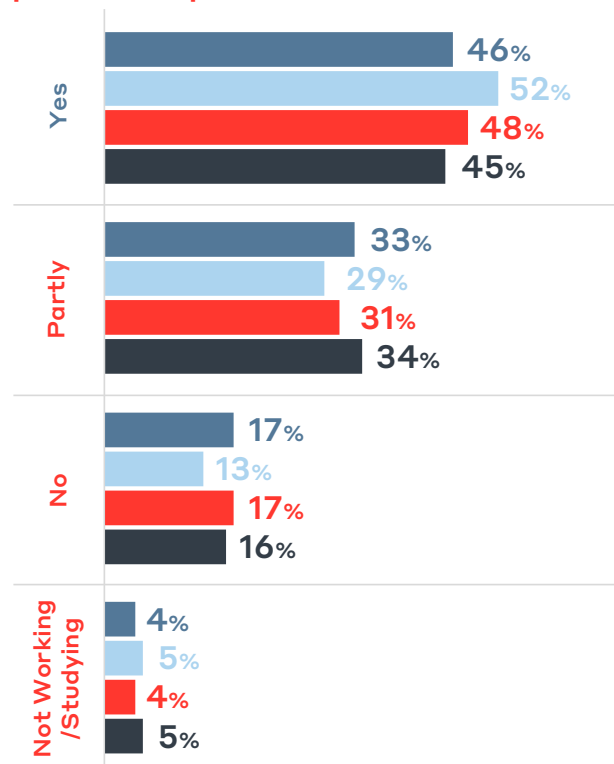


Has your own everyday life returned to how it was before the pandemic in terms of

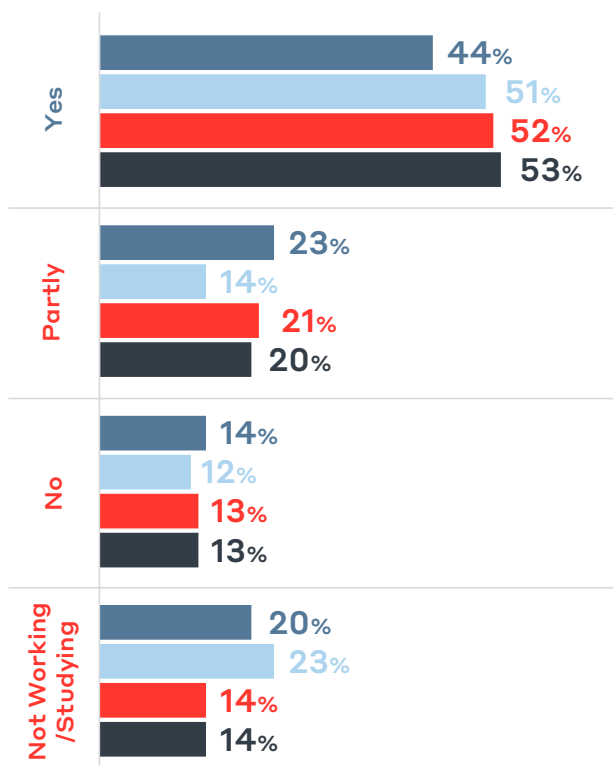
working life/your daily occupation?



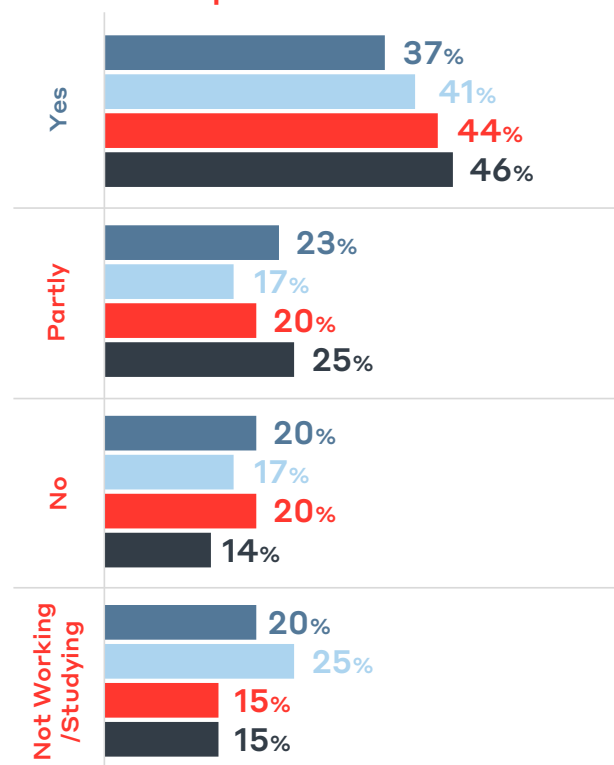
private trips?



travel to and from work



business trips

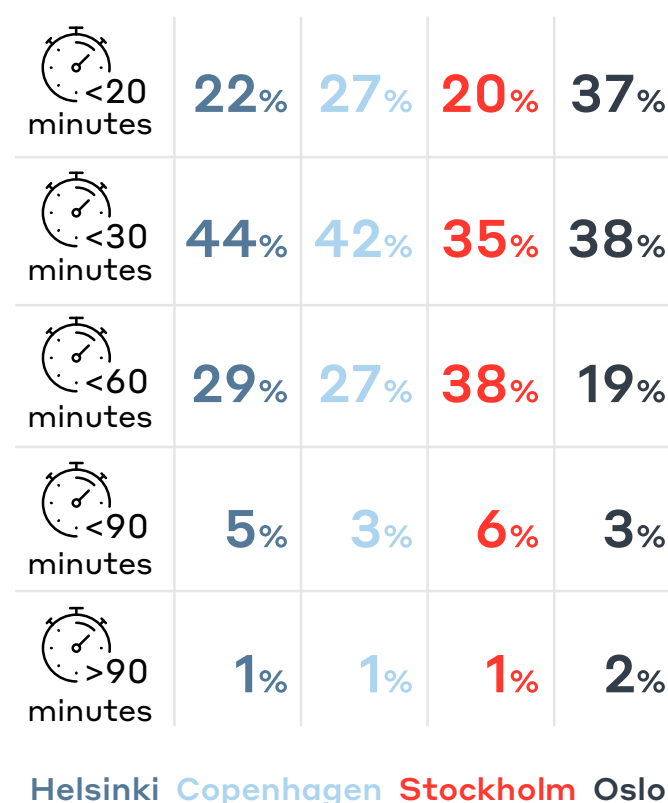


Helsinki Copenhagen Stockholm Oslo

A more distance independent labor market?

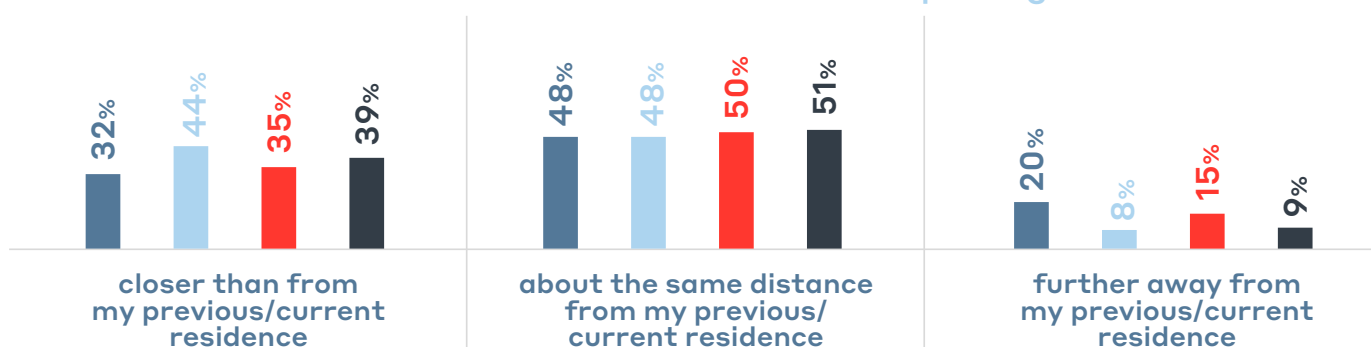
In various forums, professionals have attempted to predict how much travel patterns will persist after the pandemic. A popular speculation is that the change to a more digital workplace will increase the tolerance of commuting times given that one does not need to travel as often. However, according to the survey only a small share (4-7 %) can imagine having longer than a one hour commute to the workplace, which speaks against this perception. A majority of the people in all cities, in Oslo almost 80 %, cannot imagine having more than 30 minutes travel time from home to work putting high demands on a compact city structure and effective transport system. The main reason for moving house as a result of the pandemic was proximity to nature and green areas. The second biggest reason was either to be closer to work or be able to work better from home. That work related factors affect our living decisions the most is not surprising. Of those who have moved, in all cities over 80% have moved closer to, or to the same distance as their previous home. This indicates that the location of the workplace still is an important factor in choosing a place of residence.

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



How far do you have now/ will you have from the new home to your workplace?

Helsinki Copenhagen Stockholm Oslo



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