

2020

NEW VESSEL SURVEY
THE ISLE OF MAN
STEAM PACKET COMPANY
PRIORITISATION OF ON-BOARD
FACILITIES AND SERVICES



Island Global Research

BACKGROUND AND METHODOLOGY

Island Global Research have been commissioned by the Isle of Man Steam Packet Company to design and undertake research to help determine the specification for the new vessel that will serve the Douglas-Heysham route, focusing on the on-board facilities available. Air and sea travel preferences, and customer experience feedback across all routes was also sought.

An online survey collected data between 28 November and 19 December 2019.

The survey had a tremendous response and was completed by 8,470 respondents, of which 5,173 were Isle of Man residents and 3,297 were Isle of Man Steam Packet Company customers resident off island.

Island Global Research promoted the survey amongst Isle of Man residents via our research panel and on social media. Isle of Man Steam Packet Company promoted the survey via the company's marketing database and on social media.

Overall results and selected sub-group analysis is reported, with the aim of highlighting key insights or interesting differences by groups of interest. Results presented have had survey weights applied to correct for differences in residency between the Steam Packet Company customer base and the sample. This is a standard statistical technique.

The following pages (4-7) present the findings from the 'Priorities on the Heysham route' section of the questionnaire. This was completed by 7,122 respondents, who had either used the Heysham route in the last 3 years or indicated that would be likely to in the future.



PROFILE OF RESPONDENTS

There were 8,470 respondents to the online survey. The following table presents the profile of respondents before survey weights have been applied.

Residence	TOTAL	IOM RESIDENTS	NON-RESIDENTS
Isle of Man	61%	100%	-
England	31%	-	80%
Scotland	2%	-	6%
Wales	1%	-	4%
Northern Ireland	2%	-	4%
Republic of Ireland	1%	-	2%
Other	1%	-	4%
Gender	TOTAL	IOM RESIDENTS	NON-RESIDENTS
Male	59%	51%	72%
Female	40%	48%	27%
Other	<1%	0%	0%
Prefer not to say	1%	1%	1%
Age Category	TOTAL	IOM RESIDENTS	NON-RESIDENTS
Under 30	9%	11%	4%
30-44	19%	23%	14%
45-64	49%	47%	52%
65+	23%	19%	30%
Household Income	TOTAL	IOM RESIDENTS	NON-RESIDENTS
Up to £20,000	11%	9%	13%
£20,001 - £40,000	26%	24%	28%
£40,001 - £60,000	20%	20%	19%
£60,001 - £80,000	12%	14%	9%
£80,001 - £100,000	7%	8%	5%
£100,001 - £150,000	4%	5%	3%
Over £150,000	3%	3%	2%
Don't know	1%	1%	1%
Prefer not to say	17%	15%	20%

Household Composition	TOTAL	IOM RESIDENTS	NON-RESIDENTS
Working age adults only	47%	47%	48%
Working age with children <16 years	20%	24%	13%
Pension age adults only	18%	14%	23%
Other with children	3%	4%	3%
Other without children	9%	8%	9%
Prefer not to say	4%	3%	4%
Age of Children in Household	TOTAL	IOM RESIDENTS	NON-RESIDENTS
0-3 years	7%	8%	5%
4-8 years	9%	11%	6%
9-15 years	13%	16%	9%
Length of Residency in IOM (if applicable)	TOTAL	IOM RESIDENTS	NON-RESIDENTS
Less than 3 years	N/A	5%	N/A
3 to 5 years	N/A	4%	N/A
6 to 10 years	N/A	5%	N/A
11 to 20 years	N/A	20%	N/A
More than 20 years / I was born here	N/A	66%	N/A

PRIORITISATION OF FACILITIES REQUIRING SPACE

Respondents who had used the Heysham route in the past 3 years, or who said they were likely to in the future, were asked, "The Steam Packet Company are considering what on-board facilities and services should be prioritised when a new vessel is introduced on the route between the IOM and Heysham. Which of the following do you think should be prioritised on a new vessel?" Out of a list of 13 aspects, each respondent was able to rank their 5 most important in order of priority. An overall ranking has been calculated based upon the percentage of people who placed each one as highest, second, third, fourth or fifth priority.

The table indicates that, overall, route users believe that having more tables should be a top priority. 56% of Heysham route users placed this in their top 5, including 18% of users who said that this should be given highest priority.

Which of the following do you think should be prioritised on a new vessel?	Rank	% In top 5	% Highest priority
More tables in the standard seating areas, Niarbyl Lounge and/or Pet Lounge	1	56%	18%
Introduction of quiet lounge / quieter areas	2	56%	17%
Dedicated cafe area to eat and drink away from other seating areas	3	47%	8%
Increased availability of Standard Cabins	4	36%	11%
More places to buy hot drinks, snacks and cold food near your seat	5	40%	4%
Cinema lounge	6	37%	5%
Separate bar area	7	39%	3%
Increased availability in the Niarbyl Lounge (£5 reserved seating area)	8	23%	5%
Increased availability in the Premium Lounge	9	20%	7%
Children's play area	10	26%	4%
Increased availability in the Pet Lounge	11	19%	6%
Increased availability of Pet Friendly Cabins	12	16%	6%
Increased availability of Premium Cabins	13	11%	3%

PRIORITISATION OF FACILITIES REQUIRING SPACE BY RESIDENCY, CHILDREN AND PETS

Residents

Both Isle of Man residents and non-residents prioritise more tables and the introduction of a quiet lounge / quieter areas.

Residents then prioritise the availability of standard cabins (*including 15% who said this was top priority*) and having a cinema lounge over a café, while non-residents prioritise a café followed by more places near seat to buy hot drink and a separate bar area.

Pets

By far the biggest priorities for those who have travelled with their pets in the last 3 years is the availability of the pet lounge and pet friendly cabins, closely followed by having more tables.

Children

Those who have travelled with children were more likely than average to prioritise standard cabins and more tables.

They also prioritised entertainment facilities such as a cinema lounge and children's play area over a quiet lounge.

Isle of Man Residents –

1. Introduction of quiet lounge / quieter areas
2. More Tables
3. Standard Cabins
4. Cinema Lounge
5. Café

Non-Residents -

1. More Tables
2. Introduction of quiet lounge / quieter areas
3. Café
4. More places near seat to buy hot drinks
5. Separate Bar Area

Travelled with pets -

1. Pet Lounge Availability
2. Pet Cabins Availability
3. More Tables
4. Introduction of quiet lounge / quieter areas
5. Standard Cabin Availability

Travelled with children-

1. More Tables
2. Cinema Lounge
3. Standard Cabin availability
4. Children's play area
5. Cafe

PRIORISATION OF OTHER SERVICES

Respondents were also told that the introduction of other services may also need to be prioritised, and asked which of the following are the MOST important to include on a new vessel. Respondents could select as many as applied.

A wider choice of food and drink, more charging/plug points and improved toilet facilities received the greatest support (selected by 45%, 43% and 41% of route users).

Residents

Isle of Man residents generally felt more strongly than non-residents, but the overall order of prioritisation is largely the same. Some small differences include Manx residents being:

- More likely than non residents to believe an on-board film streaming service should be prioritised (29% R vs 15% NR) and a drinking water fountain should be prioritised (32% R vs 24% NR)
- Less likely than non-residents to prioritise the ability to reserve seats in other areas (27% R vs 32% NR) or a larger range of items in the shop (17% R vs 20% NR).

Children

Those who had travelled on the route with children are more likely to believe the following are most important: More charging/plug points (56%); Wider choice of food and drink (50%); On-board film streaming service (41%)

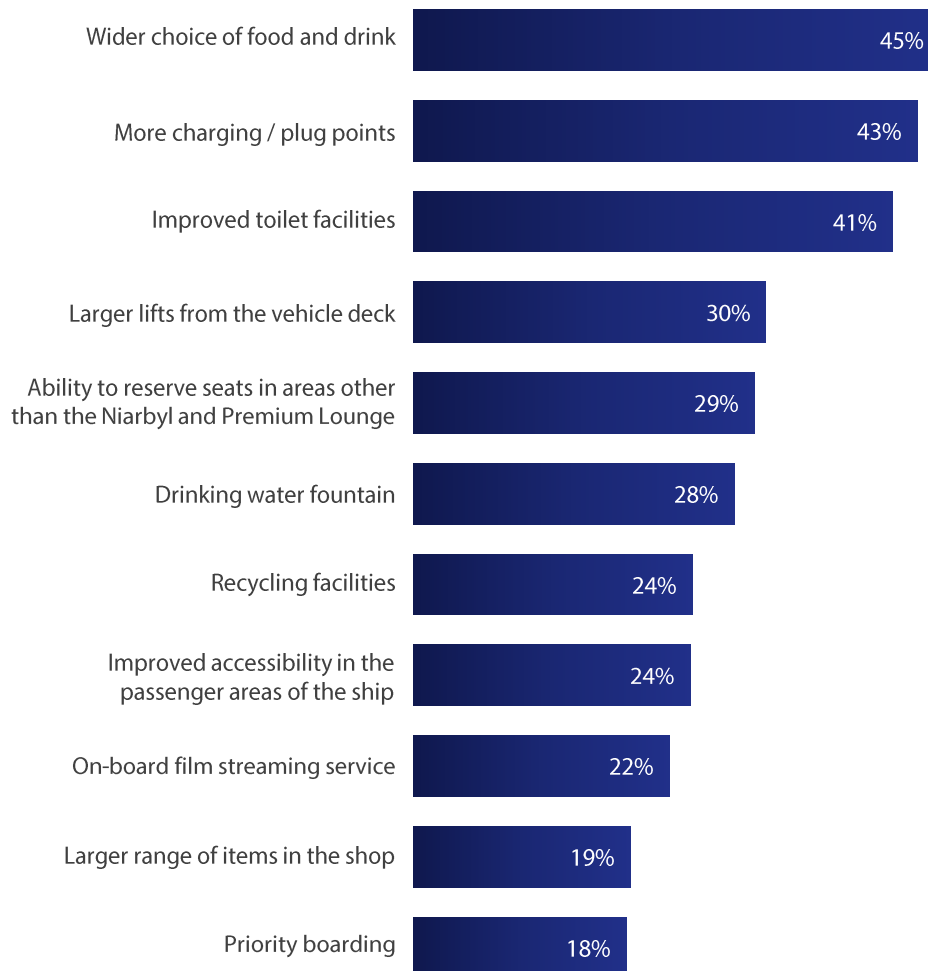
Pets

Those who had travelled on the route with pets are more likely to believe that larger lifts are most important (36%).

Accessibility

It should also be noted that of those who have used a wheelchair-accessible cabin on this route in the last 3 years, 65% said larger lifts are a priority and 57% said improved accessibility in the passenger areas is a priority.

Which of the following are the MOST important to include on a new vessel?



PRIORITISATION OF FACILITIES AND SERVICES

The facilities and services deemed to be of high priorities by route users can be categorised as follows:

Highest Priorities across all passengers:

- More tables in the standard seating areas, Niarbyl Lounge and/or Pet Lounge
- Introduction of quiet lounge / quieter areas

High Priorities for selected groups:

- Cinema Lounge & Children's play area
- Increased Pet Lounge Availability & Increased Pet Cabins Availability
- Accessibility (larger lifts & passenger areas)

Next most important facilities/services:

- Dedicated cafe area to eat and drink away from other seating areas
- Wider choice of food and drink
- More charging/plug points
- Increased availability of Standard Cabins
- Improved toilet facilities
- More places to buy hot drinks, snacks and cold food near your seat
- Separate bar area



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