

APPENDIX B – SURVEY REPORT

Heritage Railways Independent Review

09/01/2024

Reference number GB01T23B36

HERITAGE RAILWAYS REVIEW

SURVEY REPORT



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EXECUTIVE SUMMARY

SYSTRA Ltd have been commissioned by the Isle of Man (IoM) Department for Infrastructure (DoI) to undertake a review of the heritage railways on the Isle of Man and complete an Economic Impact Assessment (EIA).

As part of the Heritage Railway Independent Review, a public consultation on the network with local residents and stakeholders has been undertaken, in order to gather views about the current status and usership of the Heritage Railway network.

The aims of the public consultation were to:

- Gather the views of local residents, visitors and businesses;
- Gather the views of those involved in the Isle of Man’s voluntary heritage railways associations; and
- Aid understanding of the role the heritage rail network plays in the Isle of Man.

The consultation consisted of an online questionnaire, which was designed to be comprehensive and inclusive and in line with best practice guidance. The questionnaire sought respondents’ views on:

- Their attachment to the Isle of Man (i.e. in what capacity were they responding?);
- Their frequency of using the Heritage Railway;
- Which destination(s) they visited if they used the Heritage Railway;
- What respondents would do if the Heritage Railway was not available to use;
- Why the Heritage Railway is deemed important, with respondents required to rate several aspects of the Railway with regards to their perceived importance;
- Any other views on the Heritage Railway which were not covered by the preceding questions (an open-ended text response);and
- How the Heritage Railway should be developed in future.

The questionnaire received 4,986 responses in total, with the following key conclusions:

- Over half of respondents identified themselves a local resident on the Isle of Man, whilst 44% identified themselves as a visitor to the Island.
- A small minority of local residents (5% of respondents) use the railways more than once a week. Local residents are much less likely to use the horse tram.
- Around 40% of visitors reported using the Heritage Railway more than once a year.
- The most frequently-used stations cited in the responses are Douglas, Castletown, Laxey, and the three end-of-line stations.
- If the Heritage Railway was not available, those who would still make the journey (predominantly local residents as opposed to visitors) would switch to car (39%) or bus (11%). Very few (1%) would switch to travelling by an active mode..
- Over 40% of respondents would not make the journey if the Heritage Railway was not in place, whilst only 7% of respondents would switch to another attraction.
- The Heritage Railway is important for visitors to access tourist sites, and visitors to the Island place a higher value on tourism-related aspects such as heritage and scenery.

- Responses to the open-ended question focused mostly on the 'experience' and touristic elements of the Heritage Railway as well as connections to the ferry at Douglas. Future ideas included visitor experience enhancements, event schedule changes and potential cost savings.

2. INTRODUCTION

- 2.1.1 SYSTRA Ltd have been commissioned by the Isle of Man (IoM) Department for Infrastructure (DoI) to undertake a review of the heritage railways on the Isle of Man and complete an Economic Impact Assessment (EIA).
- 2.1.2 The rationale for this study is to produce an accurate analysis of the true value of the railway to the economy and wider society, and consider if the railways are being operated optimally and with a suitable governance structure.
- 2.1.3 Whilst a similar study was commissioned in 2018, this study needs to be seen in the wider context of the series of economic shocks that have occurred in the last five years including the COVID-19 pandemic and the significant rises in inflation and "cost of living crisis" that have been compounded by the economic effects of the Ukraine war, all of which have impacted on government finances on the Island and the cost of rail operations.
- 2.1.4 In parallel the railways on the island have been continuing through a process of transition in terms of their asset management and investment, and also their business development. The impact of this is that the railways ability to respond to change is different to how it might have been in the past.
- 2.1.5 This survey report accompanies a main report, which considers the following issues:
- Strategic context
 - Current financial performance
 - The economic contribution of the railways
 - Benchmarking with comparator railways and attractions
 - Cost Benefit Analysis of Route Sections
 - Options for development
 - Governance structures
- 2.1.6 Finally, the main report presents a series of final recommendations on the way forward for the railways.

2.2 Public consultation

- 2.2.1 As part of the Heritage Railway Independent Review, a public consultation on the network with local residents and stakeholders has been undertaken, in order to gather views about the current status and usership of the Heritage Railway network.
- 2.2.2 In addition to this a series of stakeholder engagement meetings were held with the following groups:
- Supporters and enthusiasts groups including representative from the volunteer operated Groudle Glen Railway
 - Staff representatives covering engineering, operations and marketing roles
 - Representatives from the Islands local authorities
 - Culture Vannin
 - Visit Isle of Man
- 2.2.3 This report therefore sets out:
- the approach to undertaking the public consultation; and
 - the findings from the survey.

3. PUBLIC CONSULTATION APPROACH

3.1 Objectives

3.1.1 The aims of the public consultation were to:

- Gather the views of the public;
- Gather the views of those involved in the Isle of Man's voluntary heritage railways associations); and
- Aid understanding of the role the heritage rail network plays in the Isle of Man.

3.2 Online questionnaire

3.2.1 The consultation consisted of an online questionnaire, which was designed to be comprehensive and inclusive and in line with best practice guidance.

3.2.2 The questionnaire sought respondents' views on:

- Their attachment to the Isle of Man (i.e. were they responding as a local resident, a visitor to the Island, a business, or a voluntary organisation/volunteer involved in the Heritage Railway?);
- Their frequency of using the Heritage Railway;
- Which destination(s) they visited if they used the Heritage Railway;
- What respondents would do if the Heritage Railway was not available to use (i.e. would they drive by car, not make the journey, or visit a different attraction?);
- Why the Heritage Railway is deemed important, taking into account the following:
 - Preservation of the Island's industrial heritage
 - Contribution to the local economy
 - Congestion reduction
 - Entertaining visiting friends and family
 - Access to education, work and leisure opportunities
 - The opportunity to ride on original heritage trains/trams
 - A way of enjoying the Island's scenery
 - The Heritage Railway being an all-weather attraction

3.2.3 The questionnaire also included an optional open-ended text response question, where respondents were encouraged to provide their views on the Heritage Railway and how it should be developed in future.

3.3 Questionnaire reach

3.3.1 Access to the questionnaire was made available on the Isle of Man Government's online consultation hub, with respondents able to submit their responses from the 3rd of July 2023 to the 13th of August 2023.

3.3.2 Overall, 4,986 responses to the survey were received. A detailed breakdown and analysis of the findings of the questionnaire responses is provided in Section 3.

4. ANALYSIS OF QUESTIONNAIRE FINDINGS

4.1 Characterisation of respondents

- 4.1.1 As noted above, a total of 4,986 responses to the survey were received by the Isle of Man Government during the response period.
- 4.1.2 In terms of the breakdown of respondents with regards to their attachment to the Island, the 4,986 responses can be characterised as follows:
- 2,639 respondents (52.9% of all responses) identified themselves as Isle of Man residents;
 - 2,202 respondents (44.2%) identified themselves as a visitor to the Island;
 - 87 respondents (1.7%) submitted a response on behalf of a business;
 - 37 respondents (0.7%) indicated that they were responding on behalf of a voluntary organisation or were a volunteer involved in the Heritage Railway; and
 - 21 respondents (0.4%) did not provide a response to this question.

4.2 Respondents' relationship with the Heritage Railway

- 4.2.1 In terms of the frequency of use of the Heritage Railways by local residents, the responses to the survey revealed that:
- A small minority of local residents use the railways as a regular form of transport, with 5% of respondents using the railway more than once a week; and
 - Local residents were much less likely to use the horse tram than other forms of transport.
- 4.2.2 Local residents responding to the survey reported high levels of use of the railway. For example, the inferred number of local visitors to the steam railway (IMR), were the sample of respondents representative of the whole island, would exceed the number of actual users in 2022/23 by approximately three times. This is to be expected in a public consultation as those most motivated to respond to the survey are those who use the railway the most. As such, these survey results are useful in understanding how those that use the railway the most use it and how those most passionate about the issue feel. This does however mean that the survey results need to be used as a part of wider range of data sources when undertaking analysis.
- 4.2.3 With regards to usage of the Heritage Railway by visitors to the Isle of Man, around 40% of visitors reported using the service more than once a year.
- 4.2.4 Figure 1 below shows the distribution of usage by station. Although this data should be compared against ticket data in order to obtain a complete picture of station-by-station demand for the Heritage Railway, as expected the most frequently-used stations cited in the responses are Douglas, Castletown (for the airport), Laxey, and the three end-of-line stations.

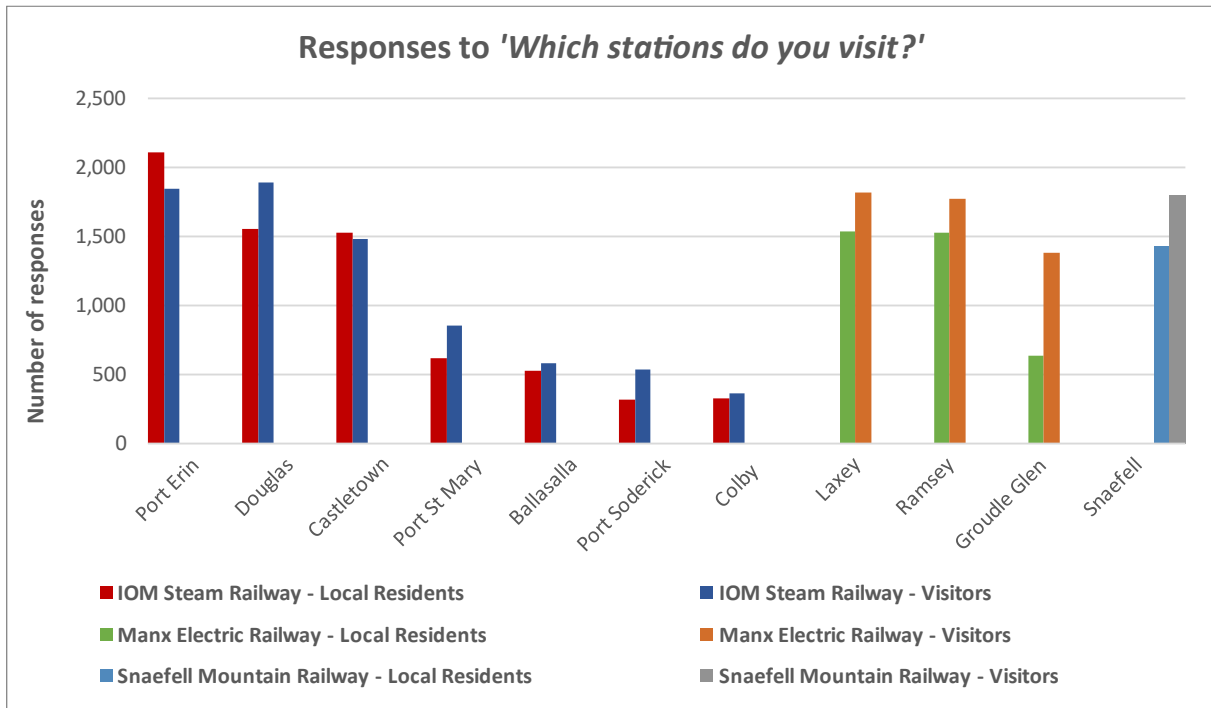


Figure 1. Distribution of station usage indicated by survey respondents

4.2.5 In terms of what respondents would do if the Heritage Railway was not available, Figure 2 below shows the relative likelihood of different user groups to switch to other modes of travel, not make the journey or visit a different attraction.

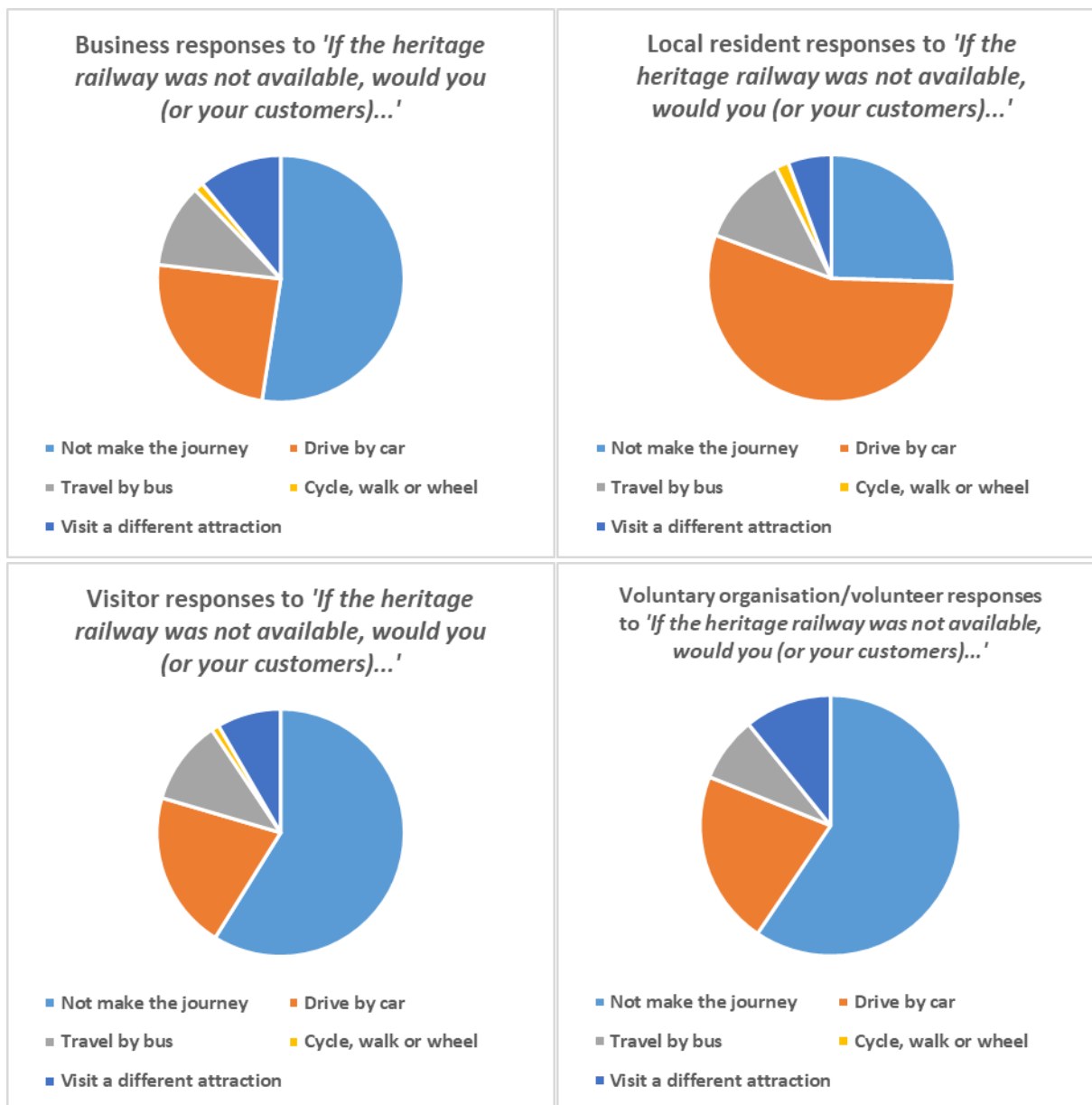


Figure 2. Likely course of action if the Heritage Railway was not available

- 4.2.6 From Figure 2, it can be seen that most Heritage Railway users who would still make the journey (predominantly local residents as opposed to visitors) would switch to car or bus, with a very small proportion switching to active modes. Local residents would be by far the most likely to switch to car, potentially given that they would typically have better access to a private car than visitors to the Island – if the Heritage Railway service was to close or its service be reduced, it is therefore likely that the number of car journeys on the Isle of Man would increase notably.
- 4.2.7 The survey data also shows the importance of the Heritage Railway as a unique tourist attraction on the Island which does not have a direct alternative, given that over 40% of total respondents and 58% of visitors specifically stated that they would not make the journey if the Heritage Railway was not in place, compared to only 7% of respondents who stated that they would switch to another attraction. The responses of those responding on behalf of a business or voluntary organisation match the responses given by visitors to the Island in this regard, emphasising the key links between the Heritage Railway and local industries (particularly those benefitting from tourism).

4.3 Importance of the Heritage Railway

4.3.1 The questionnaire asked respondents the reasons why they deemed the Heritage Railway important, with respondents asked to rate the following aspects in terms of their importance:

- Preservation of the Island’s industrial heritage
- Contribution to the local economy
- Congestion reduction
- Entertaining visiting friends and family
- Access to education, work and leisure opportunities
- The opportunity to ride on original heritage trains/trams
- A way of enjoying the Island’s scenery
- The Heritage Railway being an all-weather attraction

4.3.2 Figure 3 below shows a visual breakdown of responses given by local residents and visitors to the question regarding importance (*LR* denotes Local Residents, whereas *Vis* denotes Visitors).

4.3.3 Overall, the Heritage Railway is less important as a mode of transport to access services for local residents than it is for visitors to access tourist sites, and visitors to the Island place a higher value on aspects such as heritage, scenery and the ‘all weather’ running of the Railway.

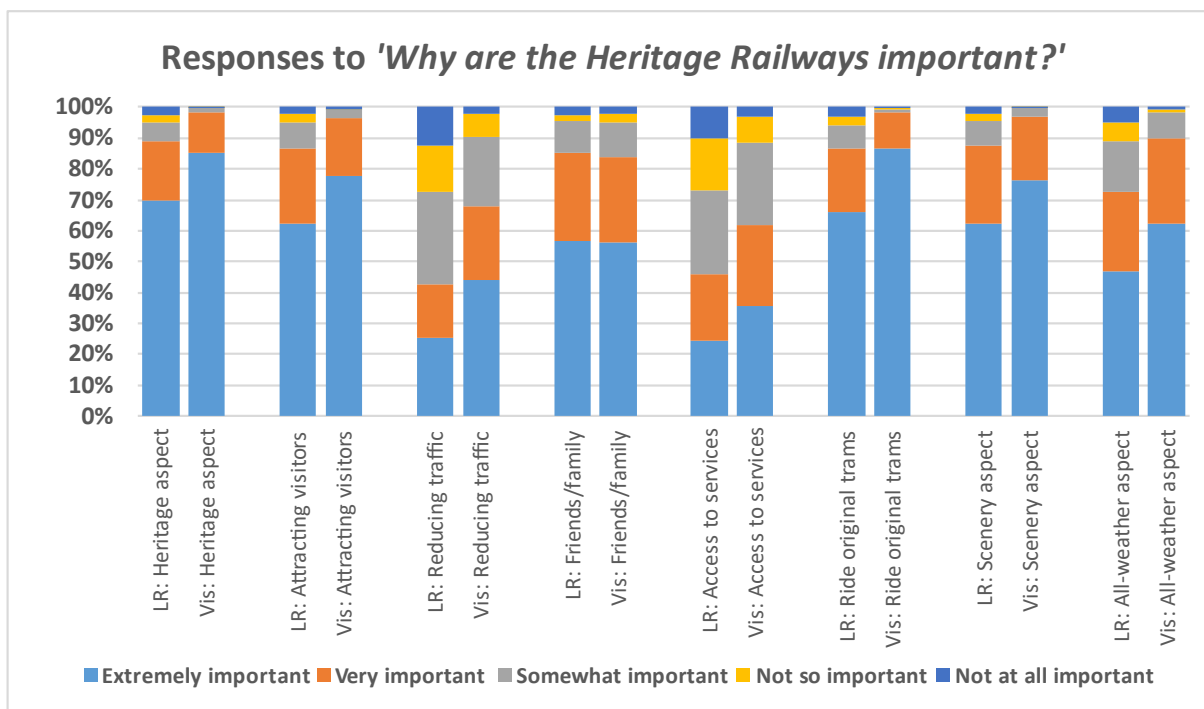


Figure 3. Breakdown of responses given by local residents and visitors to the question regarding importance

4.3.4 It is also notable that the importance of the Heritage Railway in reducing car traffic is much more often-cited by visitors to the Isle of Man than it is by local residents. Over 67% of respondents identifying as visitors agreed that it was ‘extremely’ or ‘very’ important, whilst only 42% of those identifying as local residents thought likewise.

4.3.5 Similarly, access to services is more important for visitors (60% see it as extremely/very important) than it is for local residents (45% see it as extremely/very important). However, the importance of access to employment, education and leisure opportunities may be highly concentrated amongst a small core of local residents who live within easy reach of the Heritage Railway network and therefore use it more frequently.

4.3.6 Finally, when considering the ‘extremely important’ and ‘very important’ categories together, the following most and least important aspects emerge:

- Most important for local residents: Preservation of the Island’s industrial heritage (88.4%)

- Least important for local residents: Reducing congestion/traffic (42.2%)
- Most important for visitors to the Island: Preservation of the Island’s industrial heritage (98.1%)
- Least important for visitors to the Island (excluding access to local services): Reducing congestion/traffic (67.1%)

4.4 Key themes from further comments on the Heritage Railway

- 4.4.1 The optional open-ended text response question at the survey encouraged respondents to provide their views on the Heritage Railway and how it should be developed in future.
- 4.4.2 With regards to current views on the Heritage Railway, an analysis of key terms has been employed, in order to identify the most prescient issues. This key terms analysis identified several themes which applied across the responses given to the open-ended question, and then counted the number of responses that included key terms relating to these themes.
- 4.4.3 Table 1 below provides a summary of the identified themes, the key term(s) relating to those themes, and the percentage of responses which referred to each particular theme (only themes which were referenced by over 10% of responses are shown in Table 1). A more detailed analysis of the breadth and prevalence of identified themes follows below Table 1.

Table 1. Key themes from the open-ended response question

THEME	PERCENT OF RESPONSES REFERRING TO THEME
Tourism	28%
Experience	23%
Identity and Family	16%
Historical value	15%
Access to the Sea Terminal	15%
Environmentally-friendly	12%
Commuting	12%
Access to Peel	11%

- 4.4.4 From Table 1, it is clear from analysis of the most prescient themes that:
- The ‘experience’ aspect of the Heritage Railway is a crucial draw to potential users of the Railway, and underpins its status as a major visitor attraction on the Island;
 - The interface between the Heritage Railway network and ferry access via the Sea Terminal at Douglas is particularly important, more so to visitors than local residents;
 - The Heritage Railway is seen as a part of the Isle of Man’s national identity and pride, particularly given that local residents often use it to entertain friends and family; and
 - The environmentally-friendly aspect of the Heritage Railway is very highly valued by some survey respondents, particularly as part of a wider drive towards net zero.
- 4.4.5 With regards to the identification of how the Heritage Railway should be developed in future, the following ideas emerged as common themes within the responses:

- Extending the Douglas Bay Horse Tram to the sea terminal to provide links to ferries and connect to a more central part of Douglas also improving access to the MER;
- Even though the Heritage Railway services are not currently well used by commuters, many responses mentioned expanding the service's operating hours, so that it better suits commuter travel times and offers a true alternative to car/bus travel for commuters;
- The importance of retaining the Heritage Railway service as a bastion of the Manx cultural identity, as something which demonstrates the Island's history and appeals to visitors;
- Respondents often mention the dining car and generally like the idea and attraction of the dining car offer, however some responses mentioned issues with quality and cost;
- Retaining smaller enthusiast events, but having more of them. Following on from the example set by Beamish Museum, who have gone from hosting a single big all-out enthusiast event to several scaled-down ones scattered throughout the year, perhaps it would be beneficial to have several mini transport festivals, each focusing more on an individual railway/tramway,
- Resuming the overhaul of the ex-Donegal railcars and using them for the first and last trains of the day to provide a more useful, all-weather service at the tail ends of the running season;
- The provision of a recorded audio guide, in order to provide information about the Heritage Railway and Isle of Man without the need for staff to act as 'tour guides';
- Emphasising the heritage aspect of the Railway, e.g. by having staff dressed in period attire; and
- Exploring better and more cost effective ways of operating the line token system that has been in operation since the opening of the Heritage Railway, given the time- and resource-intensiveness of operating such a system.

SYSTRA provides advice on transport, to central, regional and local government, agencies, developers, operators and financiers.

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