

# The Future of Car Passengers

**Emma Batchelor, Discover Ferries**  
**Ferry Shipping Summit 2018**

# Ferry member routes

- 75+ routes to:
  - The Continent
  - Ireland
  - Isle of Wight
  - Isle of Man
  - Isles of Scilly
  - Scottish Islands



# Discover Ferry Members



Brittany Ferries



Irish Ferries



Caledonian MacBrayne  
(Cal Mac)



P&O Ferries



MBNA Thames  
Clippers



Red Funnel



DFDS Seaways



Stena Line



Isle of Man Steam Packet



Wightlink



Isles of Scilly  
Steamship Group\*

# Discover Ferry Associates



The AA



Hogia



ABP orts



Poole Harbour  
Commissioners



The Caravan &  
Motorhome Club



Port of Dover



The Camping &  
Caravanning Club



Portsmouth Int. Port



Carus



Telenor



Core Telecom



Global Eagle

# Car journeys by sector

Total car figures carried by ferries was 8.8m in 2017, up 0.9% on 2016.

The total car carryings have increased every year since 2013.

- North Sea -1.6%
- Western Channel -2.7%
- Short sea continental routes -0.4%
  
- U.K. to Ireland +2.2%
  
- Domestic +2.2%



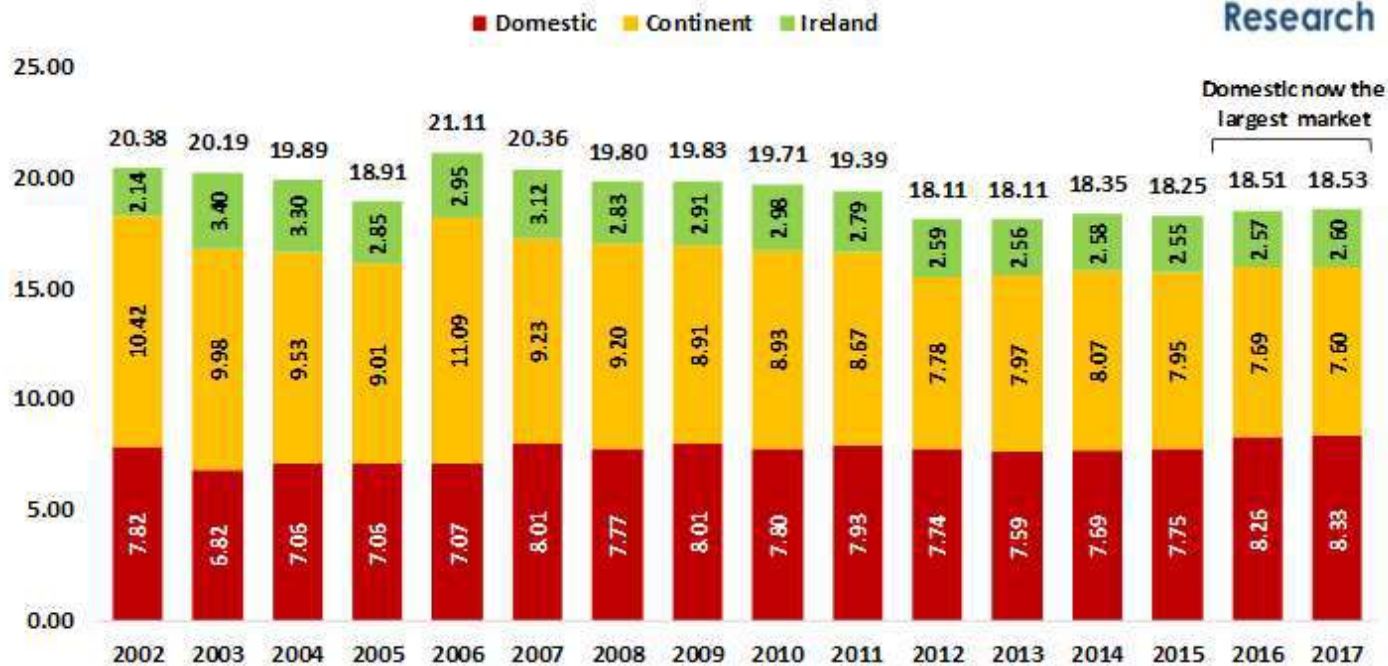
# Car journeys over 5 years

UK Continent vs Irish Sea vs Domestic, Cars 000s, 2013 - 2017



# Car passenger numbers

Estimated Car Passenger Numbers by main market, 2002-2017



Domestic now the largest market

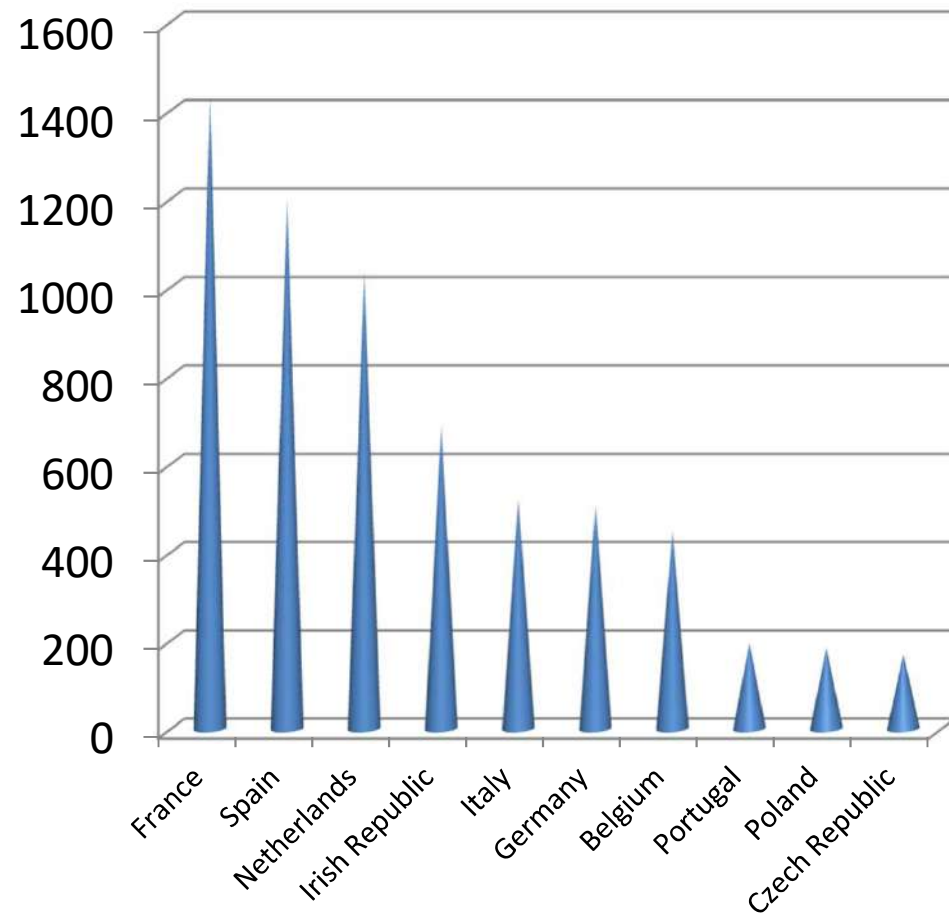
**Main change**

Decline in importance of the continental market (51% in 2002, 41% in 2017) and the rise in importance of the domestic (38% in 2002, 45% in 2017) and Ireland markets (10% in 2002, 14% in 2017).

# Holiday habits

- Stable market for domestic short and city breaks – 36.7m trips in 2016 (volume and value growth of 0.5% – 2.5%)
- Growth in European short and city breaks increased by 11% in 2016 to 7.4m trips (41% increase over last 3 years)
- Increasing trend for move from small number of longer holidays to greater number of short breaks
- Opportunity for ferries to capitalise on many of the top destinations

**Top 10 countries for short breaks  
(1-3 nights) – 000's of trips**



Source: Mintel, July 2017



# Car owner attitudes

- Fewer drivers choosing diesel
- Hybrid and EVs set to become mainstream
- 43% of drivers currently own a diesel but only 12% of them intend to buy another diesel
- 24% of drivers said next car would be hybrid or electric

Source: AA-Populus study of over 19,500 AA members, December 2017



# The future is electric



## Barriers being removed

- Range – around 200-300 miles
- Battery life – some vehicles have over 100,000 miles with no battery diminution
- Charging network
- Charging time needed (fast charger of around 30mins)
- High purchase price (grants available), high resale value
- Maintenance and repair – low maintenance but limited options for repair services
- Choice – mainstream manufacturers producing electric cars (Golf, Mini, Ford Focus)
- Younger drivers are particularly open to EVs

Source: AA-Populus study of over 19,500 AA members, December 2017

# Future of cars and ferries



Credit: Red Funnel

- Cars + ferry remains most flexible way to travel
- EVs on agenda of every ferry operator
- EV considerations
  - On board vs Port charging points
  - Power generation for charging points
  - European EV charging network
  - Evolving technology

# Investment in ferry sector



Credit: Irish Ferries

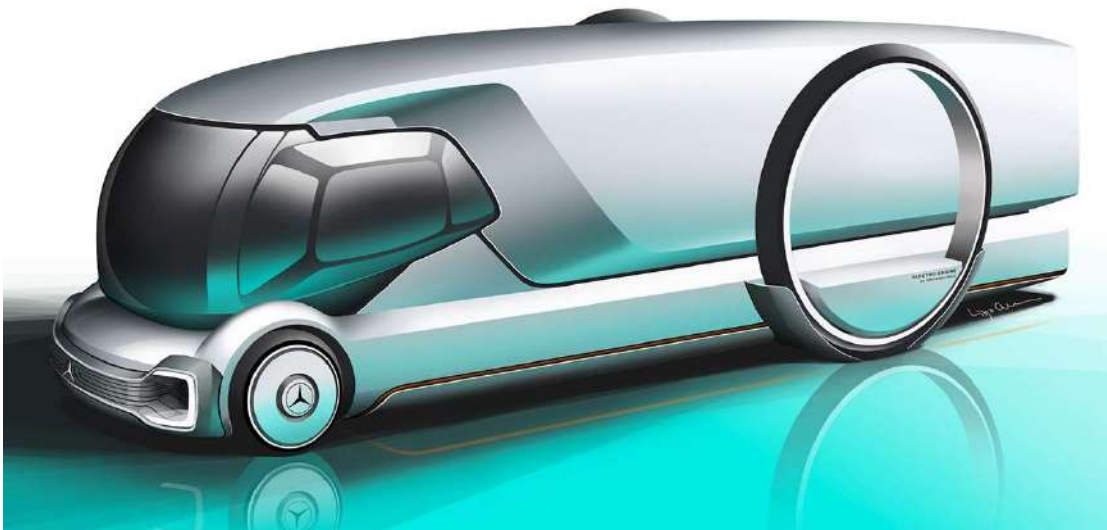


Credit: Brittany Ferries

- £1bn investment over next 4 years
  - 11 new ships
  - Port facilities
  - Upgrading existing ships
- RoPax models with increased capacity for cars
- Cruise-style ships
- High speed ferries
- New ship technology
  - Digital lounges
  - Hybrid, LNG

# Opportunities and challenges

- Harnessing the synergies
  - Freedom – curate your own experience
  - Comfort of your own space
  - Sustainability
  - Short break market
- Advent of autonomous vehicles
  - Need to cater for new technology and attitudes





**Thank you**

[discoverferries.com](https://discoverferries.com)