



Isle of Man
Government

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Passenger Survey Annual Report 2015

Economic Affairs
Cabinet Office

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Summary of Results – Isle of Man Passenger Survey 2015

- Total scheduled passenger departures increased over the year, to 663,465 in 2015 compared to 641,213 in 2014.
- The number of visitors during 2015 increased by 3.8% to 287,534.
- The number of non-business visitors staying in paid accommodation increased by 6.5% during 2015 to 134,610.
- The average length of stay of visitors to the Island (including business visitors) was estimated at 5.5 nights, which is a small increase compared to 2014.
- Estimated total expenditure by visitors to the Island during 2015 was £108.8m, and on average visitors spent £378 per visit.
- During 2015 the proportion of visitors from the North West of England fell in comparison with 2014, with another increase in the proportion of visitors from the South East and from outside the UK and Ireland.
- The majority of residents leaving the Island were either travelling outside of the UK and Ireland (23.9%) or to the North West of England (34.6%).

Methodology

The Isle of Man Passenger Survey is conducted by Economic Affairs, who interview departing passengers at Douglas Harbour and Ronaldsway Airport. Responses from these interviews are recorded electronically and analysed by the Department, with quarterly results available as part of the Quarterly Economic Report and in greater detail in the annual report.

In the Passenger Survey, interviewees are classified under the following definitions of passenger type:

Passenger Type	Definition
Isle of Man Residents (RES)	Isle of Man residents leaving the Island.
Period Visitors in Paid Accommodation (PVPA)	Non-business visitors who stayed in paid accommodation whilst on the Island.
Period Visitors Visiting Friends and Relatives (VFR)	Non-business visitors who stayed with friends or relatives whilst on the Island.
Business Visitors (BV)	Visitors who were on the Island for business purposes.
Day Visitors (DV)	Non-business visitors who did not stay overnight.

Throughout the Report, “quarterly” figures are presented in which “Q1” refers to January to April and “Q2” consists of those for May and June. This is to ensure that quarterly comparisons are not distorted by the timing of the Easter break.

Cases are selected using a complex sampling design. All results are re-weighted to account for the different numbers of passengers travelling by each route and mode of travel from the Island. As with any survey of this type, results are subject to random error variation.

The information contained in this report relates only to scheduled departures and does not include unscheduled departures such as some charter flights, cruise ship passengers and pleasure craft.

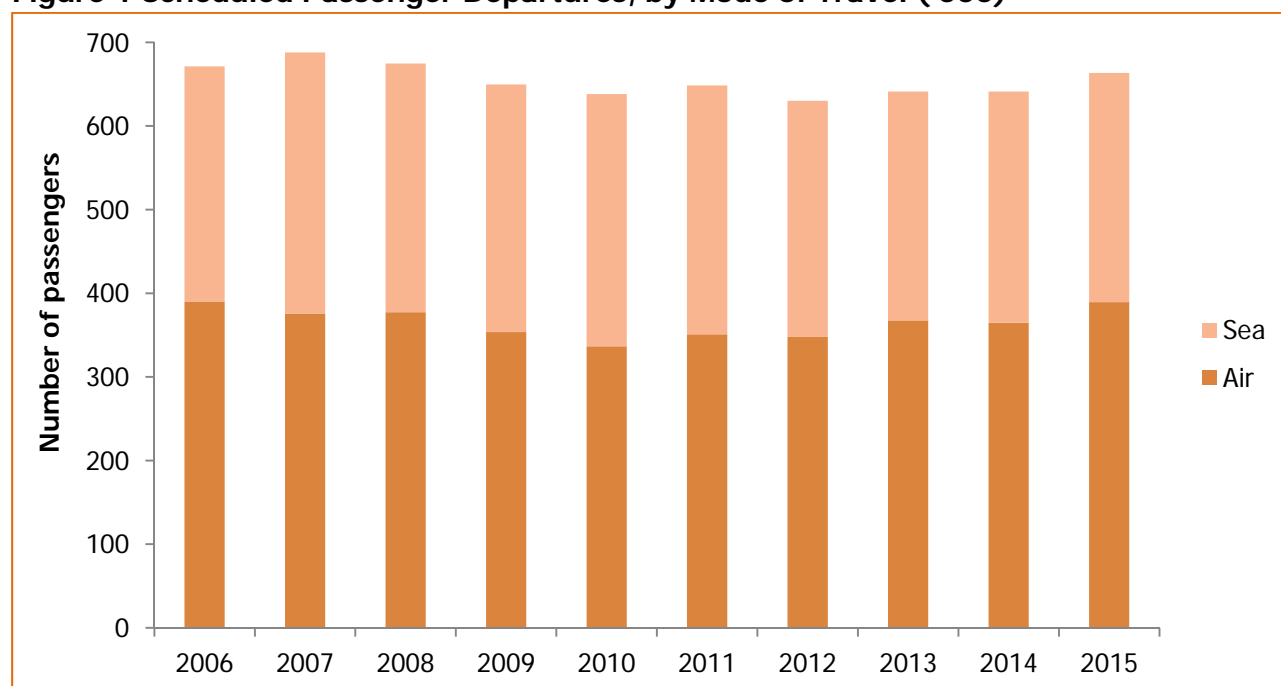
Throughout this report individual entries have been rounded independently and as a result columns may not appear to sum to column totals. This is simply a result of rounding and the unrounded entries do sum correctly.

This Report is intended to meet the general information requirements of regular users of the Passenger Survey, but additional statistics, including historical data may be made available on request. Further comments and enquiries should be addressed to:

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Scheduled Passenger Departures

Figure 1 Scheduled Passenger Departures, by Mode of Travel ('000)



During 2015, 389,410 passengers departed the Island by air, and 274,055 by sea.

Table 1 Scheduled Passenger Departures, by Quarter ('000)

Quarter	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Q1	174.8	172.6	178.1	164.8	163.0	176.4	159.4	158.2	163.1	161.0
Q2	134.9	148.8	139.4	134.5	132.1	136.6	134.8	141.7	140.6	148.8
Q3	221.1	223.7	223.0	217.7	216.5	209.8	206.3	212.7	210.4	220.5
Q4	140.5	143.0	134.3	132.6	126.5	125.8	129.6	128.6	127.1	133.2
Total	671.3	688.0	674.8	649.6	638.1	648.6	630.1	641.2	641.2	663.5

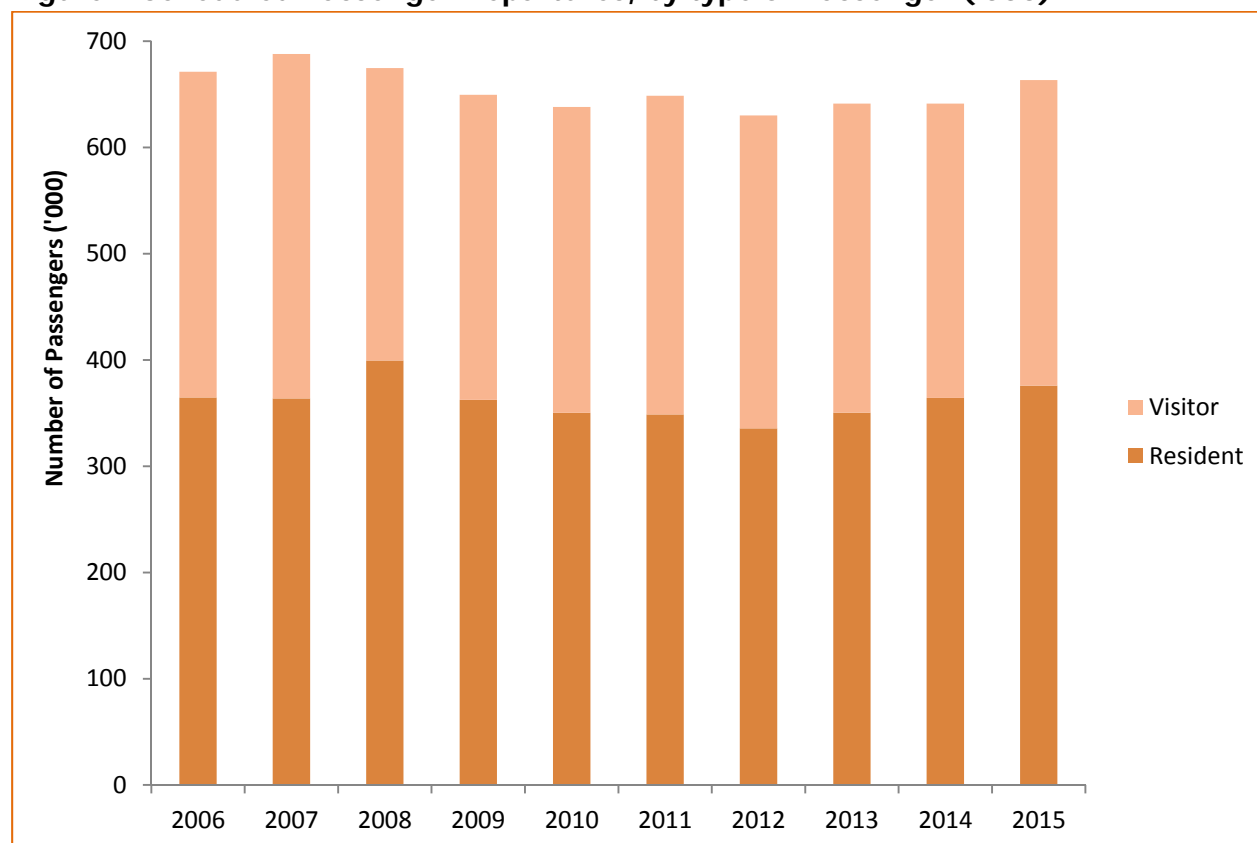
Table 2 Scheduled Air Passenger Departures, by Quarter ('000)

Quarter	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Q1	116.9	111.1	120.8	105.2	98.4	103.4	104.4	106.4	111.2	112.4
Q2	69.9	69.3	68.6	63.6	59.3	63.6	62.6	69.4	68.4	74.9
Q3	107.3	99.4	99.6	96.6	95.3	96.5	91.3	100.1	95.2	105.5
Q4	96.0	96.0	88.4	88.2	83.6	87.4	89.9	91.6	89.9	96.6
Total	390.1	375.8	377.4	353.7	336.6	350.9	348.3	367.5	364.7	389.4

Table 3 Scheduled Sea Passenger Departures, by Quarter ('000)

Quarter	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Q1	57.9	61.5	57.4	59.6	64.6	73.0	55.0	51.8	51.9	48.6
Q2	64.9	79.5	70.7	70.9	72.8	73.0	72.1	72.3	72.2	73.9
Q3	113.8	124.3	123.3	121.1	121.2	113.3	115.0	112.6	115.2	115.0
Q4	44.5	46.9	45.9	44.4	42.9	38.4	39.7	37.0	37.2	36.6
Total	281.1	312.2	297.4	295.9	301.5	297.7	281.8	273.7	276.5	274.1

Figure 2 Scheduled Passenger Departures, by type of Passenger ('000)



During 2015, there were 375,931 residents and 287,534 visitors departing from the Isle of Man.

Table 4 Scheduled Air Departures, by type of Passenger ('000)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Resident	238.0	226.9	248.7	221.0	209.9	212.2	205.0	214.8	226.5	233.5
Visitor	152.2	148.8	128.7	132.7	126.7	138.7	143.3	152.7	138.2	155.9
Total	390.1	375.8	377.4	353.7	336.6	350.9	348.3	367.5	364.7	389.4

Table 5 Scheduled Sea Departures, by type of Passenger ('000)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Resident	126.7	136.9	150.9	141.4	140.4	136.6	130.7	135.7	137.8	142.4
Visitor	154.4	175.3	146.5	154.5	161.1	161.1	151.1	138.0	138.7	131.6
Total	281.1	312.2	297.4	295.9	301.5	297.7	281.8	273.7	276.5	274.1

Visitors

Figure 3 Number of Visitors by Mode of Travel ('000)



During 2015, there were 155,913 visitors who departed by air, and 131,621 visitors who departed by sea. Total visitors during the period amounted to 287,534.

Table 6 Number of Visitors, by Quarter ('000)

Quarter	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Q1	65.0	69.7	59.4	64.7	67.7	69.2	65.0	61.8	55.6	52.6
Q2	73.8	90.9	66.7	76.8	68.0	75.3	78.1	82.5	79.3	92.2
Q3	117.4	116.5	105.9	105.3	109.0	112.3	107.3	100.5	103.2	100.1
Q4	50.5	46.9	43.2	40.3	43.0	43.0	44.1	45.9	38.8	42.6
Total	306.6	324.1	275.2	287.1	287.8	299.8	294.5	290.8	276.9	287.5

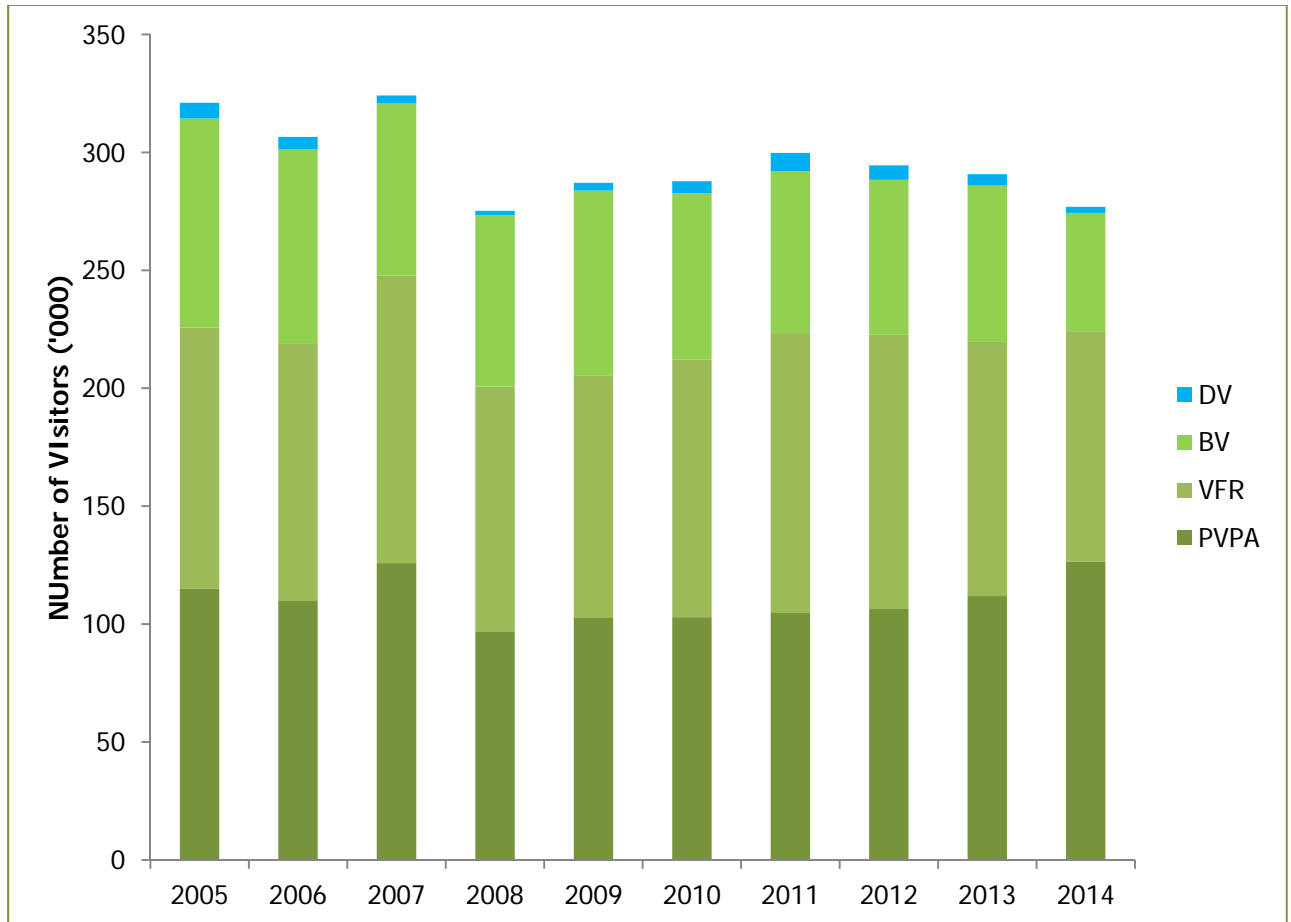
Table 7 Number of Visitors by Air, by Quarter ('000)

Quarter	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Q1	42.5	43.7	35.2	39.6	39.5	38.8	41.2	42.2	38.1	36.1
Q2	25.8	35.7	28.0	29.2	20.5	26.3	29.8	34.5	34.2	41.9
Q3	49.2	42.3	36.8	37.5	38.8	43.0	41.4	40.4	36.9	45.1
Q4	34.7	27.2	28.7	26.3	27.9	30.6	30.9	35.7	28.9	32.7
Total	152.2	148.8	128.7	132.7	126.7	138.7	143.3	152.7	138.2	155.9

Table 8 Number of Visitors by Sea, by Quarter ('000)

Quarter	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Q1	22.5	26.0	24.2	25.2	28.3	30.4	23.8	19.6	17.5	16.5
Q2	47.9	55.2	38.8	47.5	47.5	49.0	48.3	48.0	45.0	50.2
Q3	68.2	74.2	69.1	67.8	70.2	69.3	65.8	60.1	66.3	55.0
Q4	15.8	19.8	14.5	14.0	15.1	12.4	13.2	10.3	9.9	9.9
Total	154.4	175.3	146.5	154.5	161.1	161.1	151.1	138.0	138.7	131.6

Figure 4 Number of Visitors, by Type of Visitor ('000)



During 2015, there were 134,610 passengers staying in paid accommodation on the Island, 97,281 staying with friends or family, 52,764 business visitors and 2,879 day trippers.

Table 9 Number of Visitors by Air, by Type of Visitor ('000)

Visitor type	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
PVPA	33.6	34.5	24.7	26.6	23.0	26.1	27.5	35.3	42.3	56.4
VFR	53.5	53.7	46.2	44.3	46.9	55.2	58.9	60.3	52.9	52.5
BV	62.4	58.9	56.9	61.0	54.6	54.2	53.4	53.6	41.2	44.5
DV	2.6	1.7	0.8	0.8	2.3	3.2	3.5	3.6	1.7	2.6
Total	152.2	148.8	128.7	132.7	126.7	138.7	143.3	152.7	138.2	155.9

Table 10 Number of Visitors by Sea, by Type of Visitor ('000)

Visitor type	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
PVPA	76.1	91.3	72.2	76.0	80.0	78.6	78.8	76.7	84.1	78.2
VFR	55.9	68.3	57.6	58.4	62.5	63.5	57.5	47.4	44.8	44.8
BV	19.8	14.0	15.8	17.5	15.8	14.4	12.1	12.7	8.9	8.2
DV	2.6	1.7	1.0	2.6	2.9	4.6	2.6	1.2	0.9	0.3
Total	154.4	175.3	146.5	154.5	161.1	161.1	151.1	138.0	138.7	131.6

Figure 5 Total Visitor Expenditure at Constant Prices (£million)



Note: Visitor expenditure has been presented in monetary values equivalent to December 2015.

Table 11 Total Visitor Expenditure, by Type of Expenditure (£million) 2015

		Travel to/from the Island	Accommodation	Other	Total
All Visitors	Air	15.4	12.5	26.5	54.4
	Sea	15.9	13.4	25.1	54.4
	Total	31.3	25.9	51.6	108.8
of which:					
PVPA	Air	5.8	8.6	13.0	27.4
	Sea	9.7	12.2	16.9	38.8
	Total	15.5	20.8	29.9	66.2
VFR	Air	5.2	-	7.3	12.5
	Sea	4.8	-	6.3	11.1
	Total	10.0	-	13.6	23.6
BV	Air	4.2	3.9	6.1	14.2
	Sea	1.4	1.2	1.8	4.5
	Total	5.6	5.1	7.9	18.6
DV	Air	0.2	-	0.1	0.3
	Sea	0.0	-	0.0	0.0
	Total	0.2	-	0.1	0.3

Table 12 Average Expenditure, by Type of Expenditure (£) 2015

		Travel to/from the Island	Accommodation	Other	Total
All Visitors	Air	99	78	171	347
	Sea	120	101	191	412
	Total	109	89	180	378
of which:					
PVPA	Air	103	153	230	486
	Sea	124	157	216	496
	Total	115	155	222	492
VFR	Air	99	-	139	238
	Sea	106	-	141	247
	Total	102	-	140	242
BV	Air	95	87	137	318
	Sea	174	145	224	543
	Total	107	96	152	355
DV	Air	95	-	45	140
	Sea	96	-	136	232
	Total	95	-	55	150

Table 13 Number of Bed Nights 2015

		Average	Total
All Staying Visitors (exc. DV)	Air	4.8	656,243
	Sea	6.3	823,562
	Total	5.5	1,479,805
of which:			
PVPA	Air	4.2	237,751
	Sea	6.2	483,924
	Total	5.4	721,675
VFR	Air	5.9	308,637
	Sea	6.7	301,516
	Total	6.3	610,153
BV	Air	4.0	109,855
	Sea	5.0	38,123
	Total	4.2	147,977

Figure 6 Area of Residence (All Visitors) (%) 2015

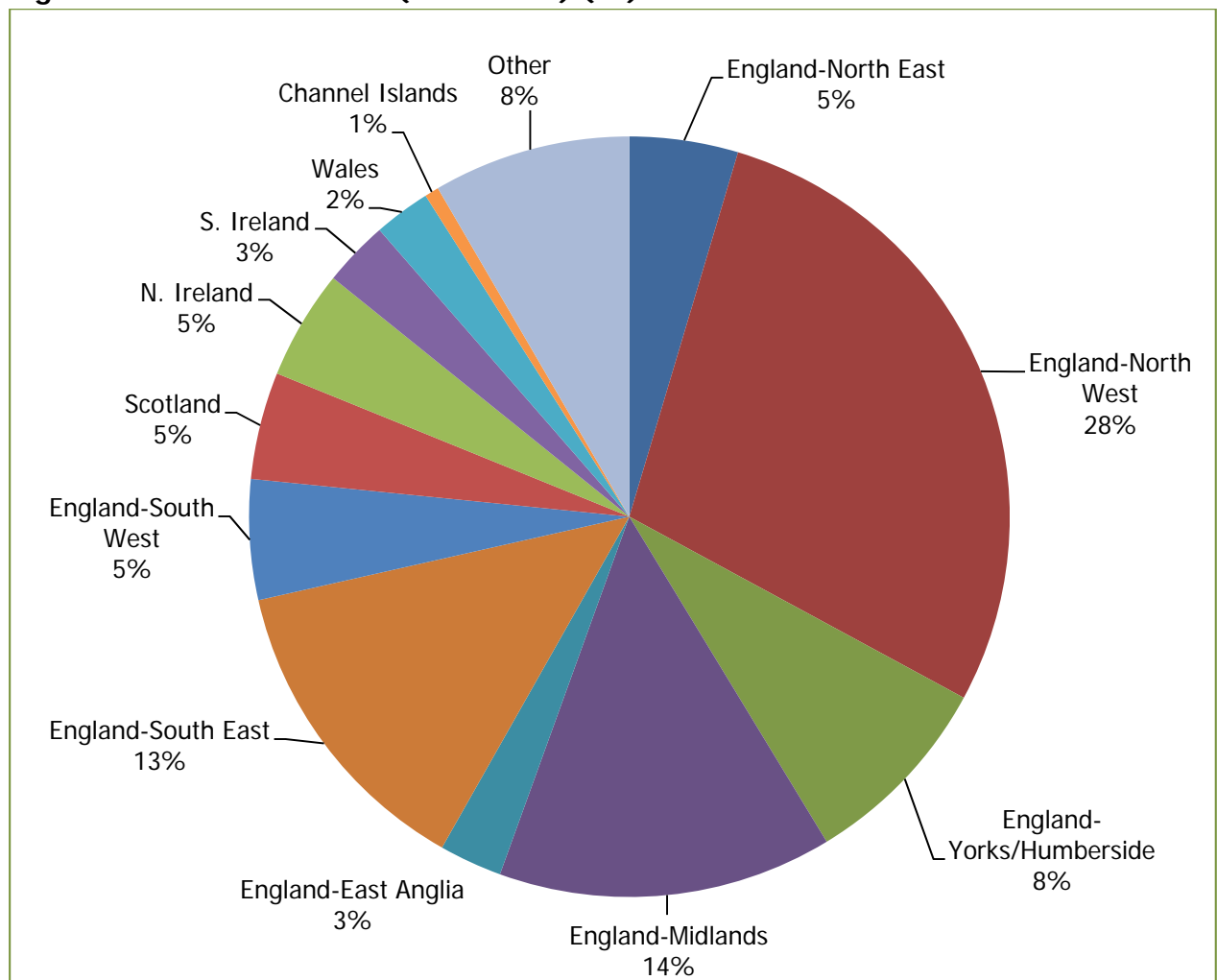


Table 14 Area of Residence (Visitors by Air) (%) 2015

Area	PVPA	VFR	BV	DV	All
England-North East	4.0	6.7	5.2	4.5	5.5
England-North West	21.0	21.5	31.7	40.9	25.4
England-Yorks/Humberside	0.8	1.7	2.2	0.0	1.7
England-Midlands	12.5	11.8	10.2	4.5	11.3
England-East Anglia	4.1	2.3	1.9	6.8	2.6
England-South East	21.4	19.8	17.3	9.1	19.1
England-South West	6.8	6.4	5.6	4.5	6.2
Scotland	4.1	4.0	5.2	4.5	4.5
N. Ireland	2.9	4.6	5.8	6.8	4.7
S. Ireland	1.6	3.7	2.2	6.8	2.7
Wales	2.7	2.7	2.4	0.0	2.6
Channel Islands	1.0	0.7	1.9	0.0	1.2
Other	17.2	14.0	8.3	11.4	12.6
Total	100.0	100.0	100.0	100.0	100.0

Table 15 Area of Residence (Visitors by Sea) (%) 2015

Area	PVPA	VFR	BV	DV	All
England-North East	3.9	3.5	4.3	0.0	3.7
England-North West	24.3	34.1	37.7	56.0	31.2
England-Yorks/Humberside	14.0	15.4	16.5	8.0	15.0
England-Midlands	17.8	15.8	18.5	24.0	17.1
England-East Anglia	3.6	2.2	1.8	4.0	2.7
England-South East	7.7	7.5	7.7	4.0	7.6
England-South West	5.4	3.3	3.3	0.0	4.1
Scotland	4.4	5.3	3.7	4.0	4.7
N. Ireland	6.8	4.2	1.2	0.0	4.6
S. Ireland	3.5	3.1	0.8	0.0	2.9
Wales	2.4	1.9	2.9	0.0	2.3
Channel Islands	0.0	0.0	0.2	0.0	0.0
Other	6.2	3.7	1.4	0.0	4.2
Total	100.0	100.0	100.0	100.0	100.0

Isle of Man Residents

Table 16 Number of Trips by Residents, by Type 2015

		Number of trips	% of Total Visitors
PVPA	Air	113,457	30.2
	Sea	82,904	22.1
	Total	196,361	52.2
VFR	Air	63,662	16.9
	Sea	44,896	11.9
	Total	108,558	28.9
BV	Air	36,487	9.7
	Sea	5,271	1.4
	Total	41,758	11.1
DV	Air	19,891	5.3
	Sea	9,363	2.5
	Total	29,254	7.8
Total	Air	233,497	62.1
	Sea	142,434	37.9
	Total	375,931	100

Table 17 Number of Nights Off-Island, by Type 2015

		Average	Total
All Residents (exc. DV)	Air	7.8	1,618,430
	Sea	7.0	929,846
	Total	7.5	2,548,276
<u>of which:</u>			
PVPA	Air	8.0	902,289
	Sea	6.3	523,602
	Total	7.3	1,425,891
VFR	Air	8.9	564,876
	Sea	8.3	370,945
	Total	8.6	935,821
BV	Air	4.9	151,264
	Sea	6.9	35,299
	Total	5.2	186,563

Figure 7 Main Destination of Residents (All Residents) (%) 2015

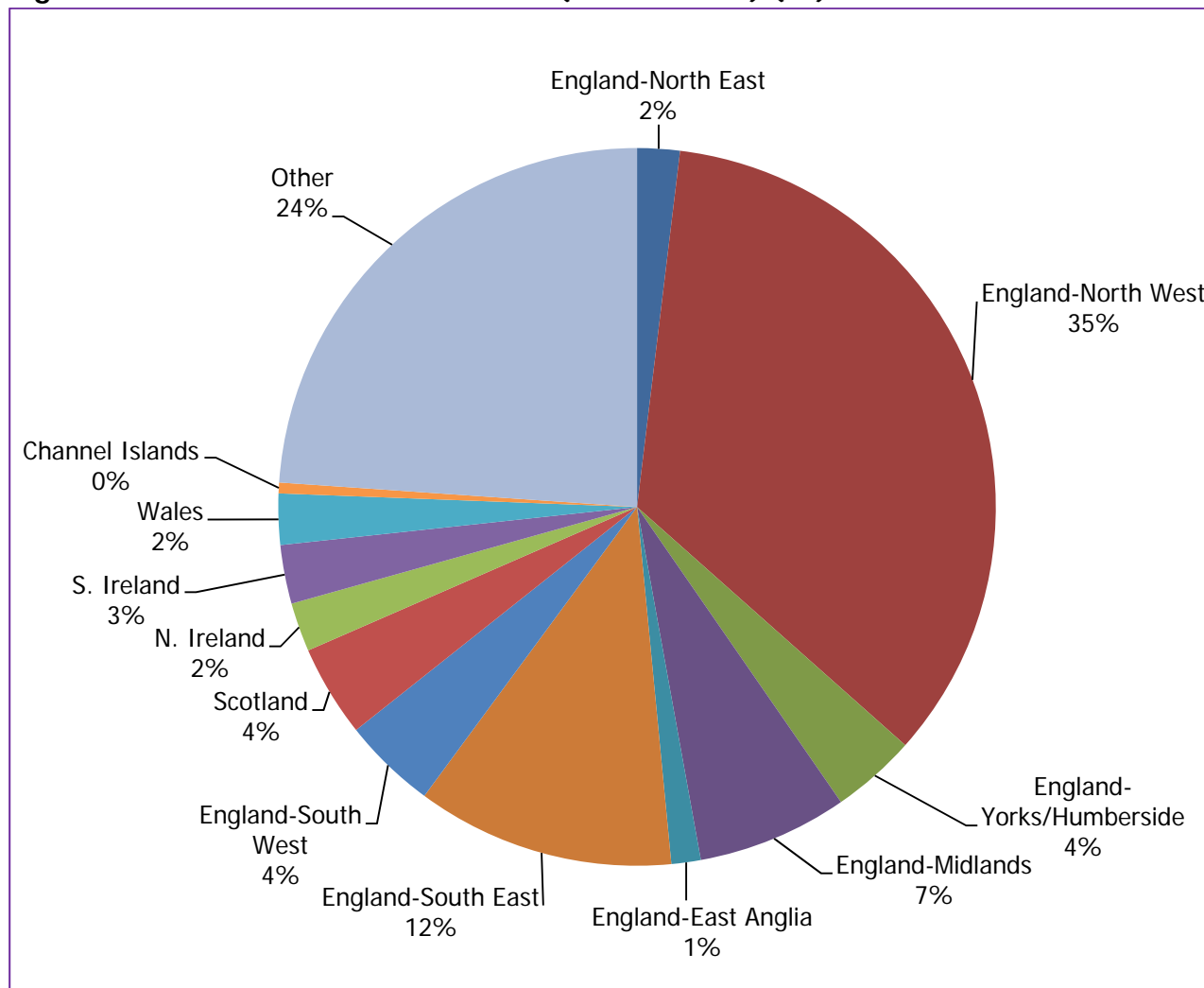


Table 18 Main Destination of Residents (Air) (%) 2015

Destination	PVPA	VFR	BV	DV	All
England-North East	1.2	3.0	2.3	0.0	1.8
England-North West	21.9	24.7	21.4	89.4	28.3
England-Yorks/Humberside	1.2	1.7	1.7	0.3	1.3
England-Midlands	3.9	5.3	6.2	1.1	4.4
England-East Anglia	0.5	2.4	1.1	0.0	1.1
England-South East	10.6	17.3	33.4	7.2	15.7
England-South West	3.0	4.9	3.0	0.1	3.2
Scotland	1.2	3.1	2.8	0.6	1.9
N. Ireland	2.2	4.3	3.3	1.2	2.9
S. Ireland	2.6	6.1	3.4	0.1	3.4
Wales	0.9	1.2	0.9	0.0	0.9
Channel Islands	0.7	0.3	2.2	0.0	0.8
Other	50.1	25.6	18.3	0.0	34.2
Total	100.0	100.0	100.0	100.0	100.0

Table 19 Main Destination of Residents (Sea) (%) 2015

Destination	PVPA	VFR	BV	DV	All
England-North East	2.0	2.7	2.9	0.0	2.2
England-North West	42.1	40.3	38.3	97.4	45.0
England-Yorks/Humberside	7.2	10.8	8.3	0.0	7.9
England-Midlands	9.4	13.0	27.9	0.0	10.6
England-East Anglia	1.9	1.9	0.7	0.0	1.7
England-South East	4.2	6.8	8.6	0.3	4.9
England-South West	6.6	5.8	3.1	0.0	5.8
Scotland	10.0	5.9	3.1	0.6	7.8
N. Ireland	0.4	2.2	3.3	0.7	1.1
S. Ireland	0.9	2.3	0.8	1.0	1.3
Wales	6.8	1.9	0.5	0.0	4.6
Channel Islands	0.0	0.0	0.3	0.0	0.0
Other	8.6	6.3	2.2	0.0	7.1
Total	100.0	100.0	100.0	100.0	100.0

Appendix 1 Sample Size by Category of Passenger and Quarter

	RES	PVPA	VFR	BV	DV	Total
January to April	3,067	338	756	586	20	4,767
May to June	1,134	558	396	293	20	2,401
July to September	1,736	612	580	260	13	3,201
October to December	2,348	198	615	351	16	3,528
Total	8,285	1,706	2,347	1,490	69	13,897

Appendix 2 Passenger Survey Questionnaire

1. Interviewer

2. Shift Code

3. May I ask you a few questions for the Island's Passenger Survey? The interview should only take one or two minutes.

4. What is your destination?

Air - Belfast

Air - Birmingham

Air - Blackpool

Air - Bristol

Air - Edinburgh

Air - Dublin

Air - Glasgow

Air - Leeds

Air - Liverpool

Air - Gatwick

Air - Luton

Air - Manchester

Air - Newcastle

Air - Southampton

Air - London City

Air - Jersey

Air - Other

Sea - Belfast

Sea - Heysham

Sea - Liverpool

Sea - Other

5. How are you travelling?

1 Foot Passenger

2 With a Vehicle/Bike/Coach

6. Do you live in the Isle of Man?

1 Yes

2 No

7. Was your visit to the Island in connection with any of these Events?

1 Yes

2 No

8. How many of you are travelling together?

Answer:

9. How many of your group are:-

0-15.....

16-30....

31-45....

46-60....

Over 60....

10. Is this trip in connection with your work?

1 Yes

2 No

11. How many nights stay does this trip include?

Answer:

12. Mainly in paid accommodation (include Homestay) or with friends or relatives?

1 In paid accommodation

2 With friends/relatives

13. What is the name of your accommodation?

14. Where do you live?

England-North East

England-North West

England-Yorks/Humberside

England-Midlands

England-East Anglia

England-South East

England-South West

Scotland

N. Ireland

S. Ireland

Wales

Channel Islands

Other

15. What is your main destination?

England-North East

England-North West

England-Yorks/Humberside

England-Midlands

England-East Anglia

England-South East

England-South West

Scotland

N. Ireland

S. Ireland

Wales

Channel Islands

Other

16. Are you on a package trip? (Yes if one payment made for travel and accommodation)

1 Yes

2 No

17. What was the cost of your accommodation?

Answer:

18. How many people does this cover?

Answer:

19. What was the cost of your travel to and from the Island? (Between IOM and UK/Eire only)

Answer:

20. How many is this for?

Answer:

21. How much did the package cost?

Answer:

22. How many does this cover?

Answer:

23. How much have you spent whilst in the Island?

Answer:

24. What would you estimate to be the total cost of this trip?

Answer:

25. How many does this cover?

Answer:

26. How many is this for?

Answer:

27. Thank you for your help



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