



**Isle of Man
Government**

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DEPARTMENT OF ECONOMIC DEVELOPMENT

TT VISITOR SURVEY 2017

TT SURVEY 2017

Introduction

This is the latest in a series of reports begun in 2010 with the aim of helping to build up a picture of the nature and economic impact of motorsport in the Isle of Man. The study has been conducted on behalf of the Motorsport Division of the Department of Economic Development.

This is the fifth survey of TT visitors in the series, similar surveys having been conducted in 2010, 2013, 2015 and 2016. The survey concentrates on estimating the total numbers who come for motorsport events and the expenditure of these visitors. A limited number of additional questions are included on important variables such as length of stay, pattern of visits and country of residence.

The report contains results of the survey for TT 2017, with some comparisons of main results for the most recent previous survey in 2016. Results for the surveys in 2010, 2015 and 2016 are available from the Department of Economic Development website. Similar surveys have been commissioned for the Southern 100 and Festival of Motorcycling in 2017, and the results of those studies will be published later in the year.

Main Findings

The main findings of the TT 2017 survey are that:

- 45,000 visitors came for TT in 2017 – an increase of 6.2% on the estimated number in 2016.
- On average, visitors stayed 6.5 nights in the Island and spent £757 on the trip. Total expenditure of TT visitors in 2017 is an estimated £34.1 million. This represents a contribution to Manx National Income of £24.6 million and an Exchequer Benefit of £4.4 million.
- As in previous years, the number of visitors in the island for TT peaked on “Mad Sunday”, reaching just under 26,600 in 2017.
- 77% had visited previously for TT, and 24% tend to visit for other motorsport events such as Festival of Motorcycling (MGP) and the Southern 100.

The results for each of the main survey variables are given on pages 3 to 6. Pages 7 & 8 contain charts showing the make-up of departures from the Island during the TT period (i.e. TT fans v other types of passenger) together with the number of TT fans in the Island each day.

Sample Size

In total, 4,200 passengers were included in the study, of which 2,500 were visitors for the TT. The response rate was 95%. Further details of the sample size and sampling error are given in Appendix 1.

Methodology

The methodology used was broadly comparable with that used for previous surveys in the series. Face-to-face interviews were conducted in the departure lounge and the vehicle loading areas at the Sea Terminal and in the departure lounge at Ronaldsway Airport. A copy of the questionnaire used can be found in Appendix 2.

Departures by Sea

Interviews were conducted with departing passengers on each of the days between the Monday of Practice Week (29th May) and the Wednesday following Senior Race day (14th June). On each day, separate samples were taken of foot passengers, of those travelling on motorcycles and of those travelling in other vehicles. Results were weighted by known totals travelling by these different modes on each day.

Departures by Air

Interviews were conducted on each day of the same 17 day period at different times throughout the day when aircraft were departing. Results were weighted by known totals of departing passengers during each day.

Acknowledgements

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Table1: Number of visitors for TT 2017 by mode of travel

	2010	2013	2015	2016	2017
Air	7,781	11,702	12,560	13,414	14,662
Sea	23,006	27,522	29,571	29,006	30,392
<i>of which, travelling by:</i>					
Foot	4,743	7,859	7,640	6,892	6,553
With motorcycle	11,709	12,227	14,720	14,444	15,362
With other type of vehicle	6,554	7,436	7,211	7,670	8,477
Total	30,787	39,224	42,131	42,420	45,054

Table 2: Nature of accommodation whilst in Isle of Man

	No.	%
Camping*	19,059	42.7
Hotel/Guest House	8,164	18.3
Homestay	7,231	16.2
With Friends/Relatives	6,204	13.9
Self-catering	2,991	6.7
Other**	982	2.2
Total***	44,635	100.0

**Includes Paddock, Snoozebox, motorhome and caravan.*

***Includes own house/apartment, car, van, boat.*

****Excludes 419 visitors who were on a day trip.*

Table 3: Average number of nights spent in the Isle of Man by mode of travel

	2010	2013	2015	2016	2017
Air	5.4	5.3	6.0	5.7	5.7
Sea	6.9	7.0	7.4	7.1	6.8
Total	6.5	6.5	7.0	6.6	6.5

Table 4: Visited for TT before (%)

	2010	2013	2015	2016	2017
Visited previously	71.5	72.7	66.0	73.9	77.2
<i>of which, tend to visit:</i>					
Every Year	63.7	64.8	59.7	69.0	67.6
Every couple of years	22.5	20.0	24.0	20.9	21.5
Less frequently	13.8	15.2	16.3	10.2	11.0

Table 5: Visits for other motorsport events (%)

	2010	2013	2015	2016	2017
Tend to visit for other events	24.1	23.8	26.0	21.8	23.6
<i>If yes, which event:-</i>					
Festival of M'cycling (MGP)	72.2	79.9	69.2	79.0	83.7
S100	18.7	29.0	34.4	35.6	32.0

Table 6(a): Country of residence - British Islands and Ireland (%)

	2010	2013	2015	2016	2017
England	62.7	69.8	63.5	68.6	67.1
N.Ireland	9.2	5.0	6.9	7.7	7.1
Wales	3.1	3.3	3.9	4.9	4.9
S.Ireland	4.8	3.5	4.0	2.9	2.3
Scotland	4.0	3.5	4.3	2.4	4.4
Channel Islands	-	-	-	0.1	0.1
Total	83.8	85.1	82.6	86.6	85.9

Table 6(b): Country of residence - Europe (%)

Germany	2.08	Norway	0.17
France	1.81	Poland	0.16
Italy	0.98	Portugal	0.13
Holland	0.86	Romania	0.12
Austria	0.67	Czech Rep	0.11
Switzerland	0.48	Latvia	0.07
Spain	0.44	Belgium	0.06
Sweden	0.41	Hungary	0.05
Luxemburg	0.34	Denmark	0.05
Greece	0.26	Bulgaria	0.03
Sweden	0.22	Total	9.5

Table 6(c): Country of residence - Rest of the World (%)

USA	2.2	Mexico	0.0
Australia	1.1	India	0.0
Canada	0.5	Hong Kong	0.0
N. Zealand	0.3	Argentina	0.0
S. Africa	0.1	Dubai	0.0
Chile	0.0	Total	4.5

Table 7 : Age profile

	Number	%
Under 18	1,211	2.7
18 to 29	5,992	13.3
30 to 49	19,240	42.7
50 to 64	11,614	25.8
65 and over	6,997	15.5
Total	45,054	100.0

Table 8 (a): Average expenditure (£)

	2010	2013	2015	2016	2017
Travel to/from the Island	160	176	210	188	191
Accommodation	136	146	175	151	157
Whilst in the Island	324	346	321	399	409
Total	620	668	706	738	757

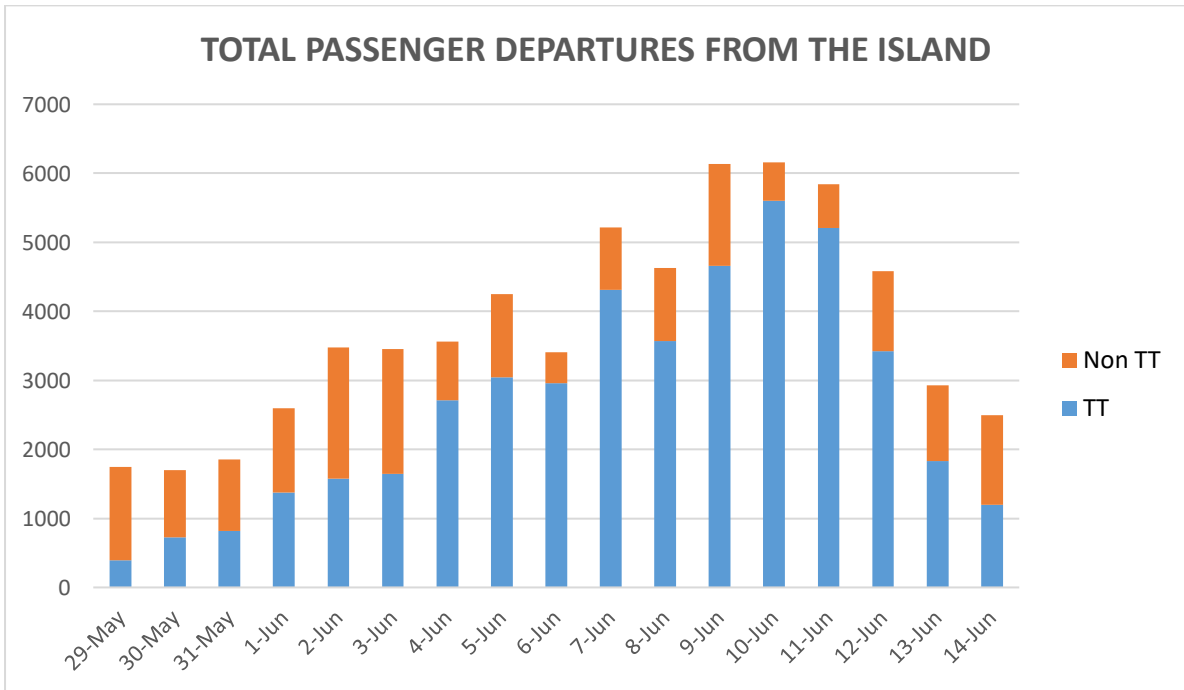
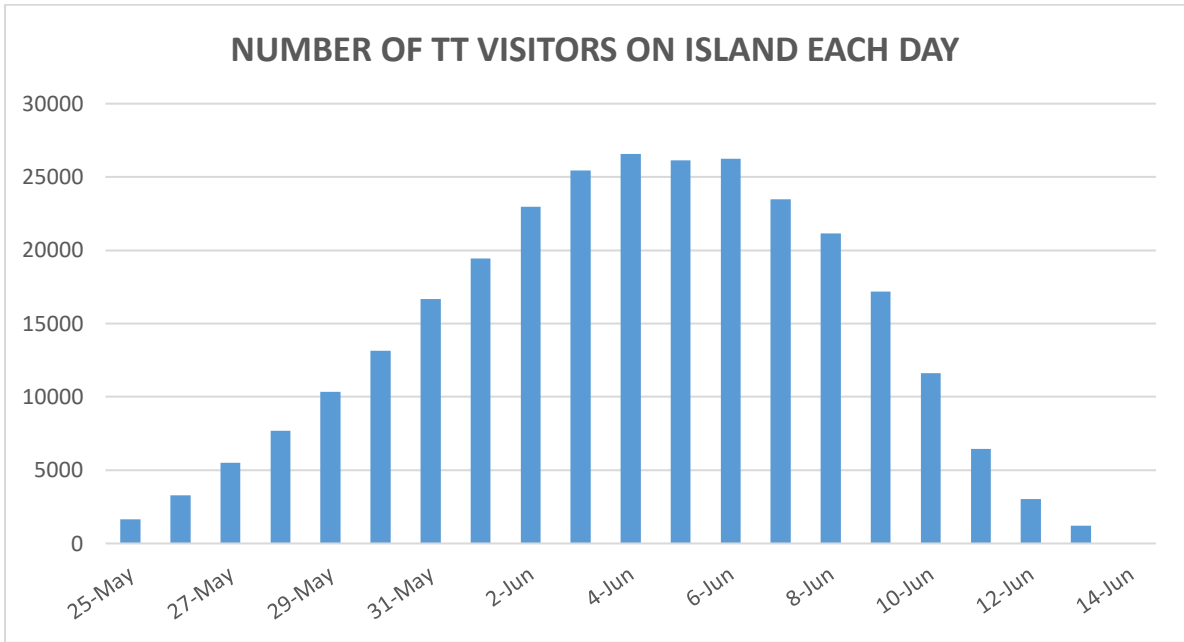
Table 8 (b): Total expenditure (£millions)¹

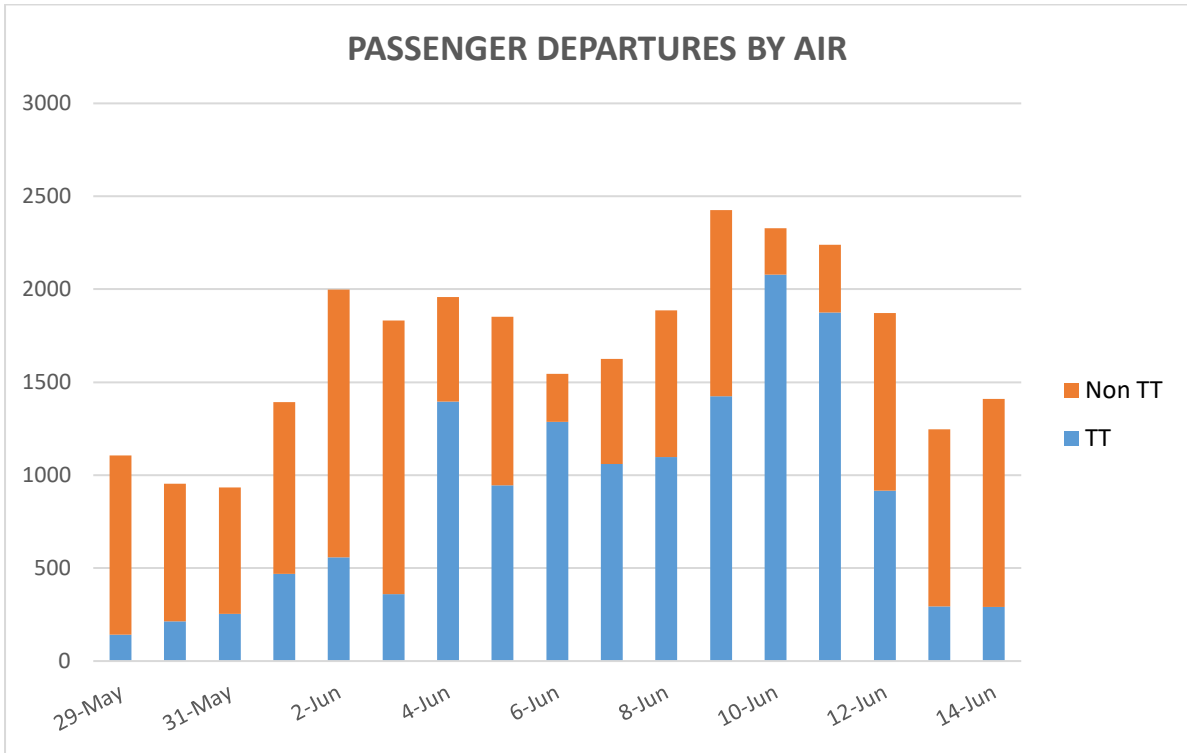
	2010	2013	2015	2016	2017
Travel to/from the Island	4.9	6.9	8.8	8.0	8.6
Accommodation	4.2	5.7	7.4	6.4	7.1
Whilst in the Island	9.9	13.6	13.5	16.9	18.4
Total	19.0	26.2	29.7	31.3	34.1
Cont¹ to National Income*	13.7	18.9	21.4	22.5	24.6
Exchequer benefit**	2.6	3.5	3.9	4.1	4.4

**This is an estimate of the "value added" (a measure of the economic benefit) to the Island derived from the expenditure of visitors.*

***Taxes resulting from the increase in National Income (excludes port taxes and NI contributions).*

¹the tourist income multiplier and the income/exchequer ratio, used to convert expenditure into national income and Exchequer benefit, have been supplied by Economic Affairs, Cabinet Office.





Sample size by type of passenger and mode of travel

	TT Visitor	Other	Total
Air	803	1,100	1,903
Sea - Foot Passenger	498	382	880
Sea - With Motorcycle	627	17	644
Sea - With Other Vehicle	572	198	770
Total	2,500	1,697	4,197

Sampling Error

As with any sample survey, the results of the TT survey will be subject to random error variation.

In order to assess the accuracy of a sample statistic it is usual to calculate the standard error and to use this to construct a 95% confidence interval around the survey finding. For example, using the standard formula for the estimated standard error of a proportion*, we can estimate that the 95% confidence interval for the number of TT visitors is +/- 885 from the estimate of 45,054. In other words, we can be 95% confident that, had all departing passengers been interviewed, the true number of TT visitors would have been found to be between 44,169 and 45,939.

The standard errors for other estimates will vary and generally will be greater as they will be based on sub-samples of the total survey sample.

*e.s.e. = $[p(1-p)/n]^{1/2}$, where p =the proportion with the characteristic of interest and n = sample size.

ISLE OF MAN TT SURVEY

Q1. How many are travelling together in your group?

Q2. (Sea passengers only) Are you travelling on foot or as the driver or passenger of a vehicle?

1-On foot 2-With m'cycle 3. In a car 3-On bus/coach 4-With other type of vehicle

Q3. Are you an Isle of Man Resident? 1-Yes 2-No (If "Yes", finish interview)

Q4. Is your trip connected with the TT? 1-Yes 2-No (If "No", finish interview)

Q5. What type of accommodation did you stay in?

1. Hotel 2. Guest House 3. Rented flat 4. Campsite 5. Snoozebox 6. Homestay
7. With friends / relatives 8. Other (Please specify.....)

Q6. Which TT events did you primarily come for?

Q7. Have you visited for the TT before? 1-Yes 2-No (If "No", go to Q9)

Q8. How often do you tend to visit for the TT?

1-Every Year 2-Every couple of years 3-Less often

Q9. Do you tend to visit for any other motorsport events? 1-Yes 2-No (If "No", go to Q11)

Q10. Which events? 1-Festival of Motorsport (MGP) 2- Southern 100
3-Other (Please specify.....)

Q11. How many nights have you spent in the Island?

Q12. Where do you live? (Country)

Q13. How many in your group are aged:

1. 0-17..... 2. 18-29..... 3. 30-49..... 4. 50-64..... 5. 65+.....

Q14. How much have you spent on:

(a) Travel to / from the Island	(i) £.....	(i) How many people.....
(b) Accommodation	(i) £.....	(ii) How many people.....
(c) Other expenditure whilst here	(i) £.....	(ii) How many people.....