



Isle of Man
Government

Reiltys Ellan Vannin

December 2017

DEPARTMENT FOR ENTERPRISE

FESTIVAL OF MOTORCYCLING VISITOR SURVEY 2017

ISLE OF MAN FESTIVAL OF MOTORCYCLING SURVEY 2017

Introduction

This is the latest in a series of reports begun in 2009 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 of Festival of Motorcycling visitors in the series. The survey concentrates on estimating the total number of visitors generated by the event 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 2017, with some comparisons of main results for the previous surveys in 2009, 2013, 2015 and 2016. Similar surveys were commissioned for the TT and Southern in 2017, and the results of those studies are available from the DED website.

Main Findings

The main findings of the FOM 2017 survey are that:

- An estimated 16,218 visitors came to the Island for the Festival in 2017 – a 2.9% increase on the number in 2016 and an 81.9% increase on the comparable figure for 2009, the year that this event was first surveyed.
- The average visitor stayed 7 nights in the Island and spent £612 on the trip. Total expenditure of these visitors in 2017 is estimated at almost £10 million. This represents a contribution to Manx National Income of just over £7.1 million and an Exchequer Benefit of £1.3 million.
- 71.1% had visited the Island previously for the Festival, and 71.3% tend to visit for other motorsport events such as TT and Southern 100.
- Most (71.1%) were from England, with 18.3% from the rest of the British Islands/Republic of Ireland and 10.6% from further afield.

The results for each of the main survey variables are detailed on pages 3 to 6.

Sample Size

A total of 3,804 interviews were conducted, of which 1,118 were with visitors for the Festival. The response rate was 96%. Further details of the sample size and sampling error are given on page 7.

Methodology

The methodology used was broadly comparable with that used for the other 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 on page 8.

Departures by Sea

Interviews were conducted with departing passengers on each of the days between Monday 21st August and Wednesday 6th September. 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 times throughout the day when aircraft were departing. Results were weighted by known totals of departing passengers during each day.

Acknowledgements

We are extremely grateful for cooperation and assistance supplied by:

Airports Division, Department of Infrastructure

Harbours Division, Department of Infrastructure

Isle of Man Steam Packet Company

The survey would not have been possible without the help of these organisations.

Table1: Number of visitors for FOM by mode of travel

	2009	2013	2015	2016	2017
Air	860	2,346	3,118	3,414	3751
Sea	8,055	11,061	12,115	12,340	12,467
<i>of which, travelling by:</i>					
Foot	1,003	1,879	2,602	2,116	1,921
With motorcycle	2,818	3,562	3,990	4,345	4,446
With other type of vehicle	4,234	5,620	5,523	5,879	6,100
Total	8,915	13,407	15,233	15,754	16,218

Table 2: Nature of accommodation whilst in Isle of Man

	2009	2013	2015	2016	2017
Camping ¹	-	31.8	20.2	28.7	34.9
Hotel/Guest House	-	33.4	26.9	29.5	27.9
Homestay	-	6.9	12.6	11.6	11.5
With Friends/Relatives	-	16.7	23.9	15.1	15.4
Rented House/Apartment etc.	-	8.5	9.3	11.3	8.3
Other ²	-	2.6	7.0	3.8	2.0
Total	-	100.0	100.0	100.0	100.0

¹Includes Paddock, motorhome and caravan.

²Includes own house/apartment, car, van.

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

	2009	2013	2015	2016	2017
Air	6.9	5.9	5.9	5.5	5.3
Sea	7.3	7.5	7.3	7.2	7.5
Total	7.3	7.2	7.0	6.8	7.0

Table 4: Visited for FOM before (%)

	2009	2013	2015	2016	2017
Visited previously	73.3	74.4	72.4	78.7	71.1
<i>of which, tend to visit:</i>					
Every Year	70.4	66.2	60.0	75.5	61.0
Every couple of years	17.5	19.0	27.3	13.4	23.6
Less frequently	12.0	14.7	12.7	11.2	15.4

Table 5: Visits for other motorsport events (%)

	2009	2013	2015	2016	2017
Tend to visit for other events	-	64.1	61.7	66.3	71.3
<i>If yes, which event:-</i>					
TT	-	95.5	95.2	92.5	96.2
Southern 100	-	27.8	24.3	36.0	39.2

Table 6: Reason for visit (%)^{3,4}

	% of Visitors
Classic TT	49.8
MGP	80.8
VMCC	15.5
Other	5.8

³The wording of this question has changed from that used in previous surveys in order to more accurately estimate the relative impact of the different events within the FOM. Consequently, the results are not comparable with those for previous years.

⁴ Respondents could choose more than one event. Consequently, the sum of these percentages is greater than 100.

Table 7: Country of residence (%)

	2009	2013	2015	2016	2017
England	79.4	80.1	73.1	73.3	71.1
Scotland	2.2	2.6	4.5	5.6	4.1
Wales	5.7	2.9	3.8	3.5	6.9
N.Ireland	3.0	2.9	7.1	3.1	4.7
S.Ireland	2.9	1.6	3.5	2.9	2.6
Other ^{5,6}	6.8	9.9	8.0	11.6	10.6
Total	100.0	100.0	100.0	100.0	100.0

⁵In 2017, "Other" included:

<i>Australia</i>	<i>Belgium</i>	<i>Canada</i>	<i>Denmark</i>
<i>Finland</i>	<i>Germany</i>	<i>Holland</i>	<i>Italy</i>
<i>Latvia</i>	<i>New Zealand</i>	<i>Norway</i>	<i>Portugal</i>
<i>Spain</i>	<i>Sweden</i>	<i>United States</i>	

⁶No doubt other countries were represented at the FOM but, due to small numbers, were not picked up in the survey.

Table 8: Age profile (%)

	2016	2017
Under 18	3.3	4.3
18 to 29	6.6	4.4
30 to 49	33.8	29.4
50 to 64	48.1	50.4
65 and over	8.1	11.5
Total	100.0	100.0

Table 9 (a): Average expenditure (£)

	2009	2013	2015	2016	2017
Travel to/from the Island	164	157	156	158	159
Accommodation	137	147	156	163	154
Whilst in the Island	250	320	268	308	299
Total	551	624	580	629	612

Table 9 (b): Total expenditure (£m)⁷

	2009	2013	2015	2016	2017
Travel to/from the Island	1.5	2.1	2.4	2.5	2.6
Accommodation	1.2	2.0	2.4	2.6	2.5
Whilst in the Island	2.2	4.3	4.1	4.9	4.8
Total*	4.9	8.4	8.9	9.9	9.9
Cont' to National Income ⁸	3.5	6.0	6.4	7.1	7.1
Exchequer benefit ⁹	0.6	1.1	1.2	1.3	1.3

⁷The 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.

⁸This is an estimate of the "value added" (a measure of the economic benefit) to the Island derived from the expenditure of visitors.

⁹Taxes resulting from the increase in National Income (excludes port taxes and NI contributions).

***Note:** Figures for total expenditure are in £millions, rounded to 1 decimal place. However, calculations have been based on unrounded figures; therefore the sum of the (rounded) figures presented in any particular column may not sum exactly to the total for that column.

Sample size by type of passenger and mode of travel

	IOM RESIDENT	FOM VISITOR	OTHER	TOTAL
Air	1,126	346	684	2,156
Sea - Foot	321	98	221	640
Sea - Motorcycle	16	406	8	430
Sea - Other Vehicle	125	268	185	578
Total	1,588	1,118	1,098	3,804

Sampling Error

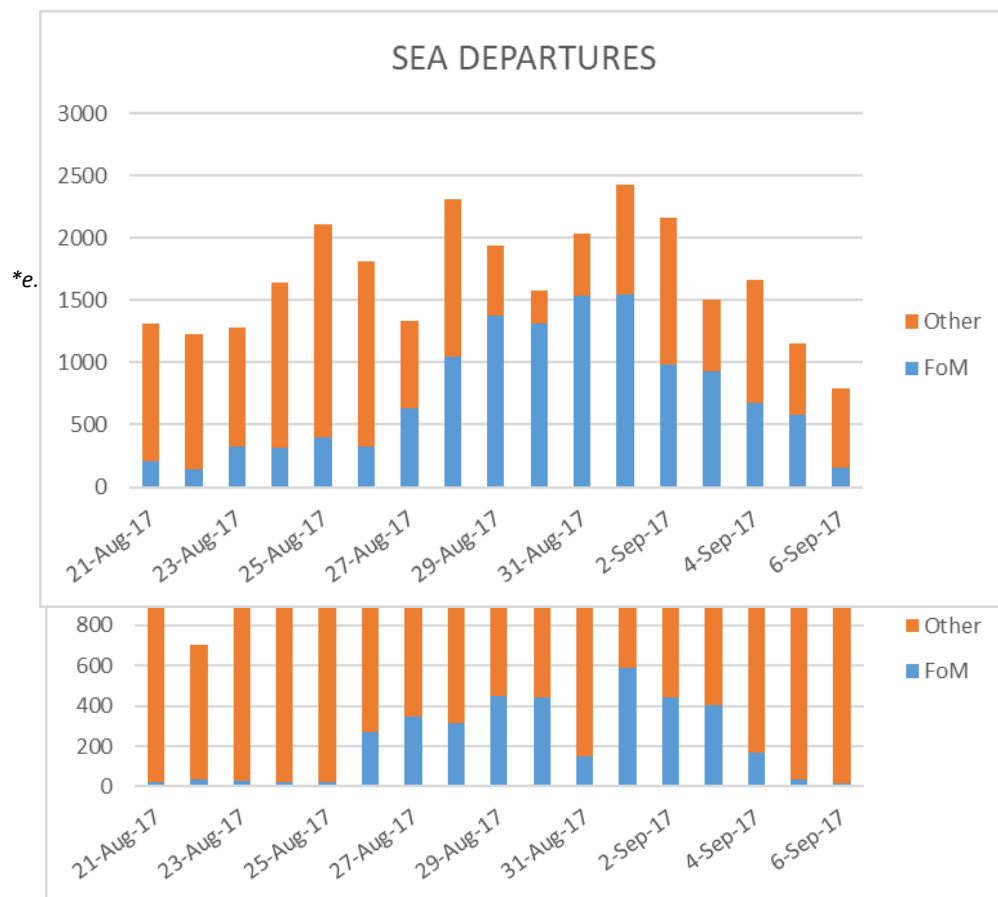
As with any sample survey, the results of this survey will be subject to random error variation.

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 visitors for FoM in 2017 is +/- 727 from the estimate of 16,218. In other words, we can be 95% confident that, had all departing passengers been interviewed, the true number of visitors would have been found to be between 15,491 and 16,945.

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.

Rounding

Percentages in tables have been rounded to 1 decimal place. Therefore, the figures may not necessarily sum to 100%.



QUESTIONNAIRE

Date..... Code..... Destination.....

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 4-On bus/coach 5-Other

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

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

Q5. What type of accommodation did you stay in?

1. Hotel 2. Guest House 3. Rented House/Flat etc 4. Campsite 6. H'stay

7. With friends / relatives 8. Other (Please specify.....)

Q6. Which events are you attending for: 1- VMCC 2-MGP 3-CTT 4-2 Day Trial 5-other

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

Q8. How often do you tend to visit for the FOM/MGP?

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- TT 2- S100 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) £..... | (ii) Covers how many people..... |
| (b) Accommodation | (i) £..... | (ii) Covers how many people..... |
| (c) Other expenditure whilst here | (i) £..... | (ii) Covers how many people..... |