



Isle of Man
Government

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DEPARTMENT FOR ENTERPRISE

SOUTHERN 100 SURVEY 2017

ISLE OF MAN SOUTHERN 100 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 for Enterprise.

This is the third survey of Southern 100 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. Similar surveys have been commissioned for the TT and Festival of Motorcycling in 2017, and the results of those studies may be obtained from the Department for Enterprise website.

Main Findings

The main findings of the 2017 Southern 100 survey are that:

- An estimated 4,770 visitors came for the Southern in 2017 – an increase of 50% on the number coming in 2016.
- On average, visitors stayed 4.3 nights in the Island and spent £434 on the trip. Total expenditure of these visitors in 2017 is estimated at around £2.1 million. This represents a contribution to Manx National Income of just over £1.5 million and an Exchequer Benefit of £0.3million.
- 75% had visited the Island previously for the Southern, and two-thirds tend to visit for other motorsport events such as TT and Festival of Motorcycling.
- The bulk (79%) were from England, with 19% from the rest of the British Islands/Republic of Ireland and 2% from further afield.

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

Sample Size

A total of 2,240 passengers were sampled, of which 495 were visitors for the Southern. The response rate was 94%. 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 10th July and Saturday 15th July. 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 6 day period at 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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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 S100

	2010	2016	2017
Air	-	602	954
Sea	-	2,559	3,816
<i>of which, travelling by:</i>			
Foot	-	329	976
With motorcycle	-	749	935
With other type of vehicle	-	1,481	1,905
Total	1,633	3,161	4,770

Table 2: Nature of accommodation whilst in Isle of Man (%)

	2016	2017
Camping*	23.5	41.3
Hotel/Guest House	42.4	40.3
Homestay	5.9	2.2
With Friends/Relatives	12.2	11.1
Rented House/Apartment etc.	12.8	3.7
Other**	3.3	1.4
Total***	100.0	100.0

**Includes Paddock, motorhome and caravan.*

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

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

	2010	2016	2017
Air	-	3.5	2.6
Sea	-	5.3	4.7
Total	5.0	5.0	4.3

Table 4: Visited for S100 before (%)

	2010	2016	2017
Visited previously	72.0	72.3	75.4
<i>of which, tend to visit:</i>			
Every Year	80.0	82.8	75.3
Every couple of years	12.0	10.7	15.7
Less frequently	7.0	6.5	9.0

Table 5: Visits for other motorsport events (%)

	2010	2016	2017
Tend to visit for other events	80.0	74.8	67.3
<i>If yes, which event:-</i>			
TT	57.0	67.1	70.4
MGP/FOM	83.0	86.8	75.2

Table 6: Country of residence

	2010	2016	2017
England	67.0	72.2	79.1
Scotland	21.0	6.3	3.5
Wales	2.0	5.7	1.9
N.Ireland	6.0	9.1	9.1
S.Ireland	3.0	3.5	4.2
Other ¹	3.0	3.2	2.2
Total	100.0	100.0	100.0

¹In 2017, "Other" Included:

Australia Austria Belgium Denmark
Germany Holland Spain

No doubt many other countries were represented at the S100 but, due to small numbers, were not picked up in the survey.

Table 7 : Age profile (%)

	2016	2017
Under 18	3.0	1.8
18 to 29	4.0	4.7
30 to 49	31.0	40.3
50 to 64	50.1	41.2
65 and over	11.9	11.9
Total	100.0	100.0

Table 8 (a): Average expenditure (£)

	2010	2016	2017
Travel to/from the Island	120	132	132
Accommodation	92	119	88
Whilst in the Island	192	194	214
Total	404	445	434

Table 8 (b): Total expenditure (£m)¹

	2010	2016	2017
Travel to/from the Island	0.2	0.4	0.6
Accommodation	0.2	0.4	0.4
Whilst in the Island	0.3	0.6	1.0
Total	0.7	1.4	2.1
Cont' to National Income*	0.5	1.0	1.5
Exchequer benefit**	0.1	0.2	0.3

**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

	IOM RESIDENT	S100 VISITOR	OTHER	TOTAL
Air Passenger	670	115	225	1,010
Sea – Foot Passenger	288	59	270	617
Sea – On Motor Cycle	18	194	8	220
Sea – In Other Vehicle	96	127	170	393
Total	1,072	495	673	2,240

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 Southern 100 in 2017 is +/- 291 from the estimate of 4,770. 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 4,479 and 5,061.

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.

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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 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 Southern 100? 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. Are you here to: 1. Compete 2. Spectate 3. Other (eg, part of team)

Q7. Have you visited for the S100 before? 1-Yes 2-No (If "No", go to Q9)

Q8. How often do you tend to visit for the S100?

- 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- Festival of Motorsport (MGP)

- 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 (i) £..... (ii) Covers how many people.....