



Isle of Man
Government

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Isle of Man Passenger Survey Survey 2017

Economic Affairs

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Summary of Results – Isle of Man Passenger Survey 2017

- Total scheduled passenger departures increased over the year, to 687,981 in 2017 compared to 675,048 in 2016.
- The number of visitors during 2017 decreased by 8.7% to 266,850. The 1.9% increase in total passenger departures is accounted for entirely by increased travel of Isle of Man residents.
- After holding nearly constant from 2015 to 2016, the number of non-business visitors staying in paid accommodation decreased in 2017 by 3.6%, to 129,860.
- The average length of stay of visitors to the Island (including business visitors) was estimated at 5.1 nights, which is a 2.6% increase compared to 2016.
- Despite lower overall visitor numbers, the estimated total expenditure by visitors to the Island during 2017 increased by 5.6% to £112.6 m, and average visitor spend increased by 23.4% to £448, although it should be noted that this rate of increase may in part be attributable to improved data collection methods applied to visitor expenditure.
- During 2017 the proportion of visitors from the North West of England (28.8%) was comparable to 2016, although the proportion of visitors from the South East declined slightly. Visitors from outside the UK and Ireland continue to increase.
- The majority of residents leaving the Island were either travelling to the North West of England (36.1%) or outside of the UK and Ireland (27.0%).

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.

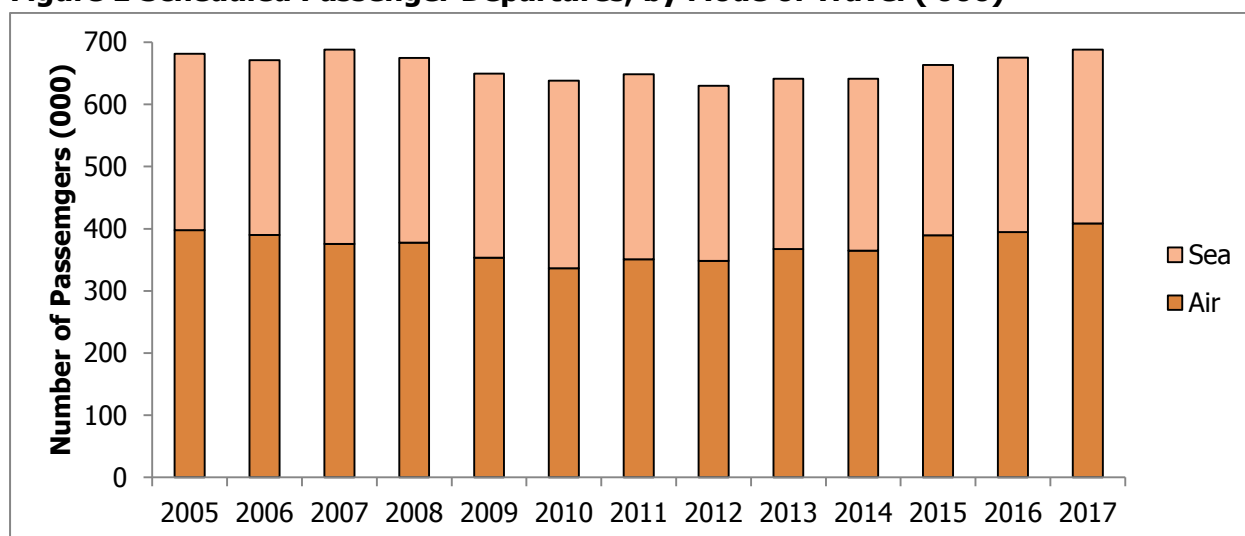
Throughout this report individual entries have been rounded independently and as a result columns may not appear to sum to column totals. This is simply a result of rounding and the unrounded entries do sum correctly.

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:

Economic Affairs
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Scheduled Passenger Departures

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



During 2017, there were 408,771 passengers who departed the Island by air, and 279,210 passengers who departed by sea.

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

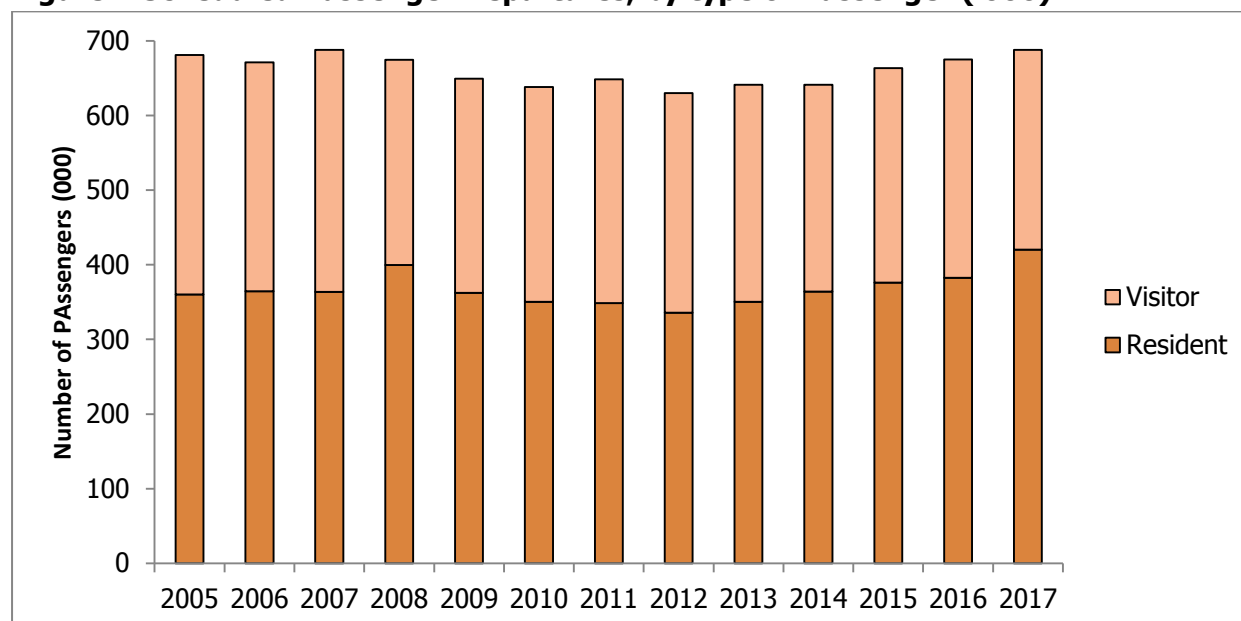
Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017
Q1	164.8	163.0	176.4	159.4	158.2	163.1	161.0	171.4	175.9
Q2	134.5	132.1	136.6	134.8	141.7	140.6	148.8	144.4	150.6
Q3	217.7	216.5	209.8	206.3	212.7	210.4	220.5	223.2	224.9
Q4	132.6	126.5	125.8	129.6	128.6	127.1	133.2	136.1	136.5
Total	649.6	638.1	648.6	630.1	641.2	641.2	663.5	675.1	688.0

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

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017
Q1	105.2	98.4	103.4	104.4	106.4	111.2	112.4	122.3	121.3
Q2	63.6	59.3	63.6	62.6	69.4	68.4	74.9	72.9	75.2
Q3	96.6	95.3	96.5	91.3	100.1	95.2	105.5	102.2	104.1
Q4	88.2	83.6	87.4	89.9	91.6	89.9	96.6	97.2	108.1
Total	353.7	336.6	350.9	348.3	367.5	364.7	389.4	394.6	397.7

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

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017
Q1	59.6	64.6	73.0	55.0	51.8	51.9	48.6	49.2	54.6
Q2	70.9	72.8	73.0	72.1	72.3	72.2	73.9	71.5	75.4
Q3	121.1	121.2	113.3	115.0	112.6	115.2	115.0	121.0	120.8
Q4	44.4	42.9	38.4	39.7	37.0	37.2	36.6	38.8	39.5
Total	295.9	301.5	297.7	281.8	273.7	276.5	274.1	280.5	290.2

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

During 2017, there were 421,131 residents and 266,850 visitors departing from the Isle of Man.

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

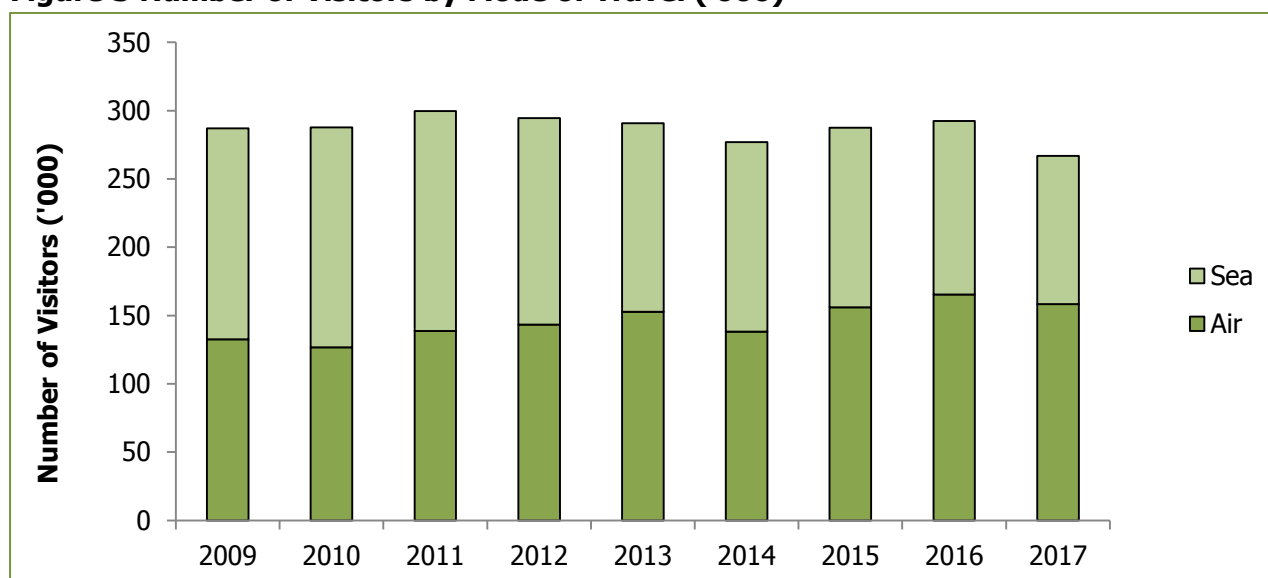
Type	2009	2010	2011	2012	2013	2014	2015	2016	2017
Resident	221.0	209.9	212.2	205.0	214.8	226.5	233.5	229.1	239.5
Visitor	132.7	126.7	138.7	143.3	152.7	138.2	155.9	165.4	158.2
Total	353.7	336.6	350.9	348.3	367.5	364.7	389.4	394.6	397.7

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

Type	2009	2010	2011	2012	2013	2014	2015	2016	2017
Resident	141.4	140.4	136.6	130.7	135.7	137.8	142.4	153.6	181.6
Visitor	154.5	161.1	161.1	151.1	138.0	138.7	131.6	126.9	108.6
Total	295.9	301.5	297.7	281.8	273.7	276.5	274.1	280.5	290.2

Visitors

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



During 2017, there were 158,249 visitors who departed by air, and 108,601 visitors who departed by sea. Total visitors during the period amounted to 266,850.

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

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017
Q1	64.7	67.7	69.2	65.0	61.8	55.6	52.6	72.1	54.8
Q2	76.8	68.0	75.3	78.1	82.5	79.3	92.2	81.8	88.3
Q3	105.3	109.0	112.3	107.3	100.5	103.2	100.1	94.8	88.4
Q4	40.3	43.0	43.0	44.1	45.9	38.8	42.6	43.6	35.3
Total	287.1	287.8	299.8	294.5	290.8	276.9	287.5	292.3	266.9

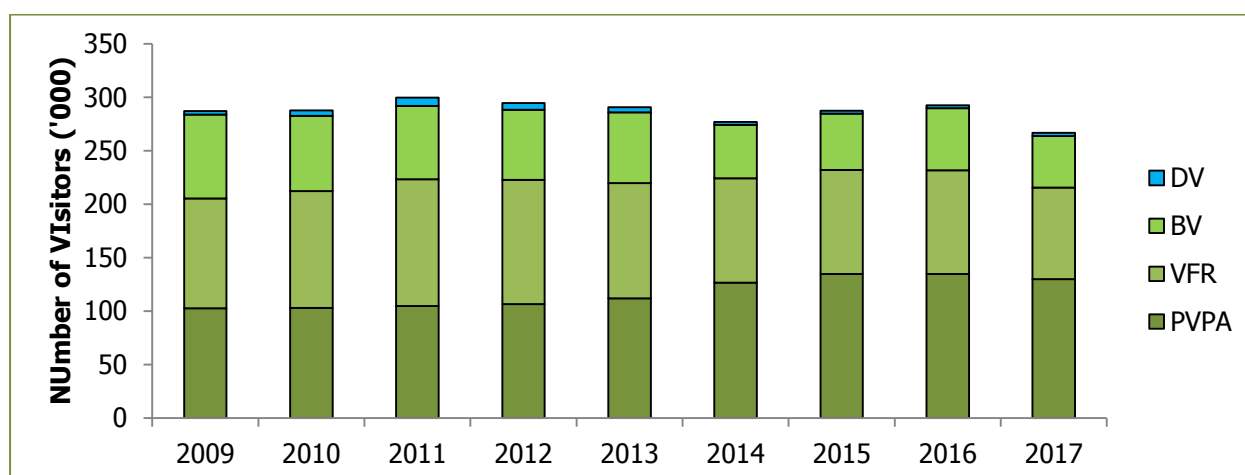
Table 7 Number of Visitors by Air, by Quarter ('000)

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017
Q1	39.6	39.5	38.8	41.2	42.2	38.1	36.1	50.8	44.6
Q2	29.2	20.5	26.3	29.8	34.5	34.2	41.9	38.1	41.5
Q3	37.5	38.8	43.0	41.4	40.4	36.9	45.1	41.5	45.1
Q4	26.3	27.9	30.6	30.9	35.7	28.9	32.7	35.1	27.0
Total	132.7	126.7	138.7	143.3	152.7	138.2	155.9	165.4	158.2

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

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017
Q1	25.2	28.3	30.4	23.8	19.6	17.5	16.5	21.3	10.2
Q2	47.5	47.5	49.0	48.3	48.0	45.0	50.2	43.7	46.8
Q3	67.8	70.2	69.3	65.8	60.1	66.3	55.0	53.4	43.3
Q4	14.0	15.1	12.4	13.2	10.3	9.9	9.9	8.5	8.4
Total	154.5	161.1	161.1	151.1	138.0	138.7	131.6	126.9	108.6

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



During 2017, there were 129,860 passengers staying in paid accommodation on the Island, 85,623 staying with friends or family, 48,157 business visitors and 3,210 day trippers.

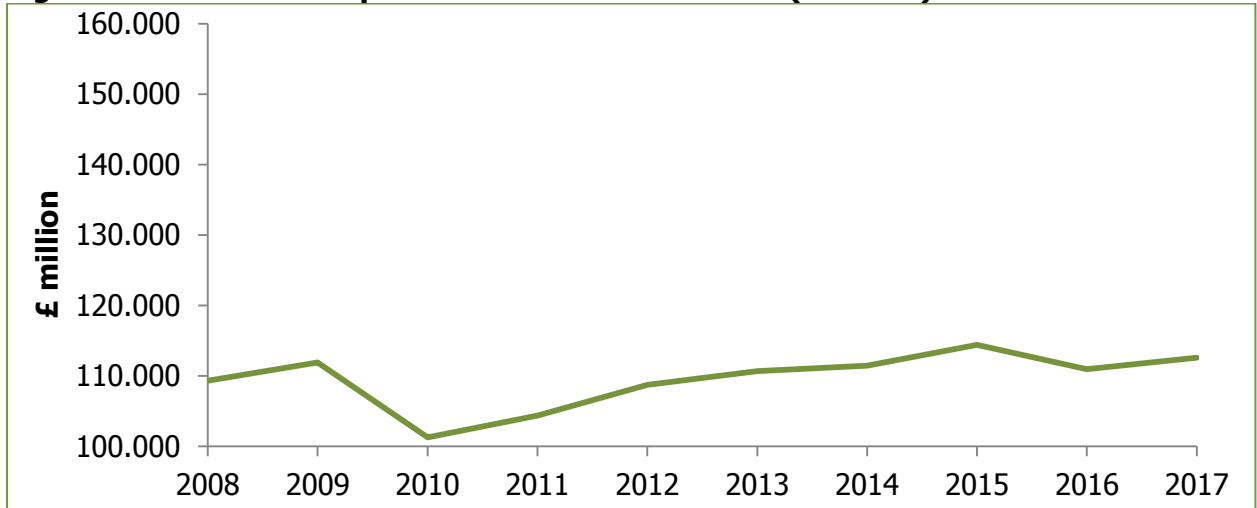
Table 9 Number of Visitors by Air, by Type of Visitor ('000)

Visitor type	2009	2010	2011	2012	2013	2014	2015	2016	2017
PVPA	26.6	23.0	26.1	27.5	35.3	42.3	56.4	55.5	59.6
VFR	44.3	46.9	55.2	58.9	60.3	52.9	52.5	58.4	55.7
BV	61.0	54.6	54.2	53.4	53.6	41.2	44.5	49.3	40.4
DV	0.8	2.3	3.2	3.5	3.6	1.7	2.6	2.3	2.6
Total	132.7	126.7	138.7	143.3	152.7	138.2	155.9	165.4	158.2

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

Visitor type	2009	2010	2011	2012	2013	2014	2015	2016	2017
PVPA	76.0	80.0	78.6	78.8	76.7	84.1	78.2	79.2	70.3
VFR	58.4	62.5	63.5	57.5	47.4	44.8	44.8	38.7	29.9
BV	17.5	15.8	14.4	12.1	12.7	8.9	8.2	8.9	7.7
DV	2.6	2.9	4.6	2.6	1.2	0.9	0.3	0.1	0.6
Total	154.5	161.1	161.1	151.1	138.0	138.7	131.6	126.9	108.6

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



Note: Visitor expenditure has been presented in monetary values equivalent to December 2017.

Table 11 Total Visitor Expenditure, by Type of Expenditure (£million) 2017

		Travel to/from the			
		Island	Accommodation	Other	Total
All Visitors	Air	16.4	14.3	30.4	61.1
	Sea	15.3	12.7	23.6	51.6
	Total	31.7	27.0	53.9	112.6
of which:					
PVPA	Air	6.1	10.1	14.9	31.1
	Sea	10.2	11.3	17.6	39.0
	Total	16.3	21.4	32.4	70.1
VFR	Air	6.1	0.0	8.5	14.5
	Sea	3.6	0.0	4.0	7.6
	Total	9.7	-	12.4	22.1
BV	Air	4.0	3.7	7.0	14.6
	Sea	1.4	1.3	2.0	4.7
	Total	5.4	5.0	8.9	19.3
DV	Air	0.3	0.0	0.1	0.4
	Sea	0.1	0.0	0.0	0.1
	Total	0.4	0.0	0.1	0.5

Table 12 Average Expenditure, by Type of Expenditure (£) 2017

		Travel to/from the			
		Island	Accommodation	Other	Total
All Visitors	Air	110	103	196	409
	Sea	151	127	228	506
	Total	126	113	209	448
of which:					
PVPA	Air	112	187	256	555
	Sea	158	175	257	590
	Total	137	181	256	574
VFR	Air	107	0	153	260
	Sea	122	0	143	265
	Total	112	0	150	262
BV	Air	112	132	179	423
	Sea	186	192	306	684
	Total	124	144	197	465
DV	Air	105	0	45	150
	Sea	125	0	68	193
	Total	109	0	41	150

Note: Average expenditures (Table 12) are estimated from the data given by those visitors who responded to these questions, and total average expenditure is the sum of average expenditure types for each visitor type. Total expenditures (Table 11) are estimated by multiplying average expenditure by total visitor headcount in each category, including non-respondents. Thus the grand total expenditure is the sum of estimated sub-totals by type of expenditure, and because of distributed non-response, may differ slightly from the average expenditure multiplied by the total visitor headcount.

Table 13 Number of Bed Nights 2017

		Average	Total
All Staying Visitors (exc. DV)	Air	4.8	771,082
	Sea	6.1	646,624
	Total	5.3	1,417,705
of which:			
PVPA	Air	4.3	256,118
	Sea	5.9	408,421
	Total	5.1	664,539
VFR	Air	6.5	370,771
	Sea	6.6	192,090
	Total	6.5	562,861
BV	Air	3.5	144,193
	Sea	6.4	46,112
	Total	3.9	190,305

Figure 6 Area of Residence (All Visitors) (%) 2017

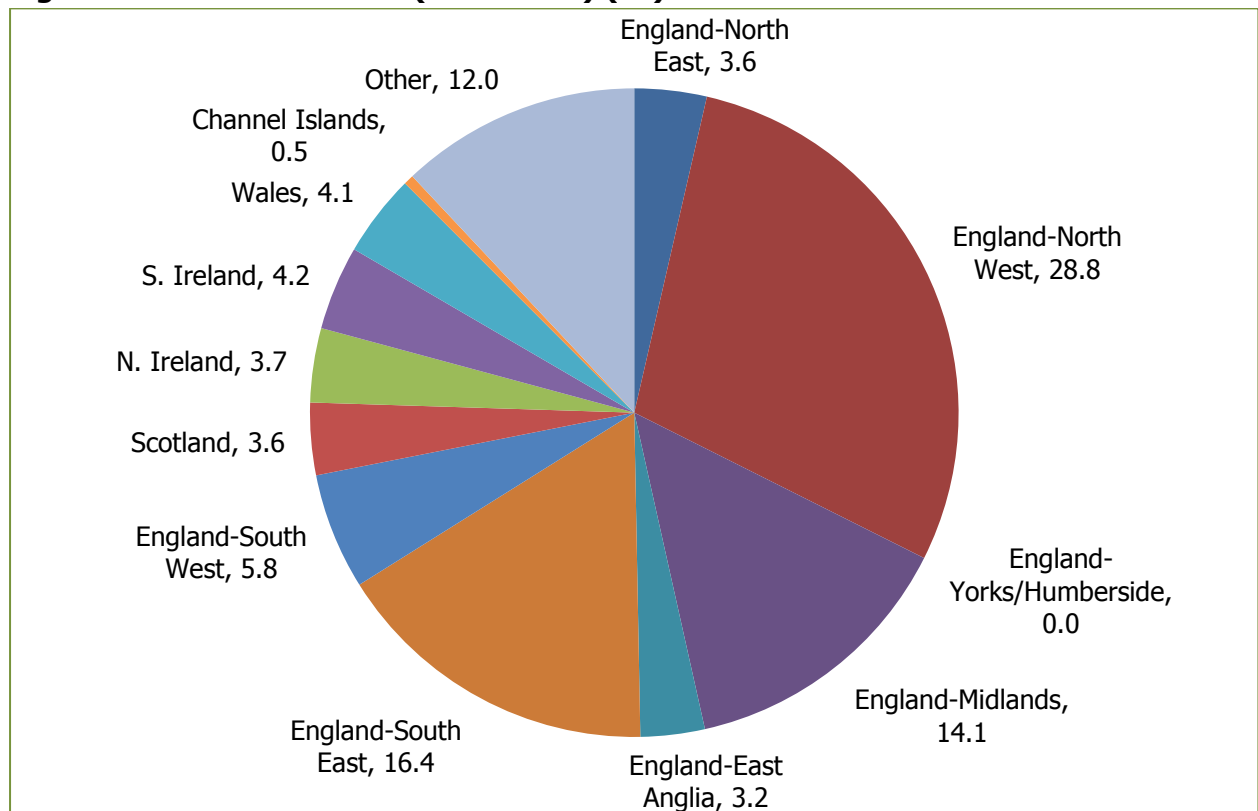


Table 14 Area of Residence (Visitors by Air) (%) 2017

Area	PVPA	VFR	BV	DV	All
England-North East	1.6	3.5	1.6	1.6	2.2
England-North West	24.4	27.0	26.9	56.8	26.5
England-Yorks/Humberside	0.0	0.0	0.0	0.0	0.0
England-Midlands	8.7	9.9	9.7	18.7	9.5
England-East Anglia	3.9	2.1	1.2	0.0	2.5
England-South East	20.2	23.3	22.6	12.6	21.8
England-South West	5.6	6.6	7.5	1.8	6.4
Scotland	2.6	2.5	2.7	0.0	2.6
N. Ireland	3.5	2.9	4.0	0.0	3.3
S. Ireland	5.0	5.8	4.8	3.9	5.2
Wales	2.4	1.8	2.7	0.8	2.2
Channel Islands	0.3	0.6	1.9	0.0	0.8
Other	21.7	14.2	14.3	3.8	16.9
Total	100.0	100.0	100.0	100.0	100.0

Table 15 Area of Residence (Visitors by Sea) (%) 2017

Area	PVPA	VFR	BV	DV	All
England-North East	5.1	5.9	8.7	7.2	5.6
England-North West	23.8	47.9	49.2	69.4	32.4
England-Yorks/Humberside	0.0	0.0	0.0	0.0	0.0
England-Midlands	26.0	11.3	16.3	0.0	21.2
England-East Anglia	5.2	2.6	1.5	10.7	4.2
England-South East	7.5	9.9	5.8	11.4	8.1
England-South West	4.8	5.4	2.9	0.0	4.8
Scotland	5.9	4.1	3.8	0.0	5.2
N. Ireland	3.2	6.3	7.3	0.0	4.3
S. Ireland	3.1	1.7	1.1	0.0	2.6
Wales	9.4	2.4	2.1	0.0	6.9
Channel Islands	0.1	0.0	0.0	0.0	0.1
Other	5.8	2.6	1.2	1.3	4.3
Total	100.0	100.0	100.0	100.0	100.0

Isle of Man Residents

Table 16 Number of Trips by Residents, by Type 2017

		Number of trips	% of Total Visitors
PVPA	Air	127,175	30.2
	Sea	111,861	26.6
	Total	239,036	56.8
VFR	Air	59,760	14.2
	Sea	54,753	13.0
	Total	114,513	27.2
BV	Air	28,729	6.8
	Sea	6,758	1.6
	Total	35,487	8.4
DV	Air	23,824	5.7
	Sea	8,271	2.0
	Total	32,655	7.8
Total	Air	239,488	56.9
	Sea	181,643	43.1
	Total	421,131	100.0

Table 17 Number of Nights Off-Island, by Type 2017

		Average	Total
All Residents (exc. DV)	Air	7.3	1,795,139
	Sea	5.9	1,012,406
	Total	6.7	2,807,545
of which:			
PVPA	Air	8.2	1,084,690
	Sea	6.4	686,836
	Total	7.4	1,771,526
VFR	Air	9.3	575,513
	Sea	5.8	297,544
	Total	7.7	873,056
BV	Air	4.6	134,935
	Sea	4.5	28,027
	Total	4.6	162,962

Figure 7 Main Destination of Residents (All Residents) (%) 2017

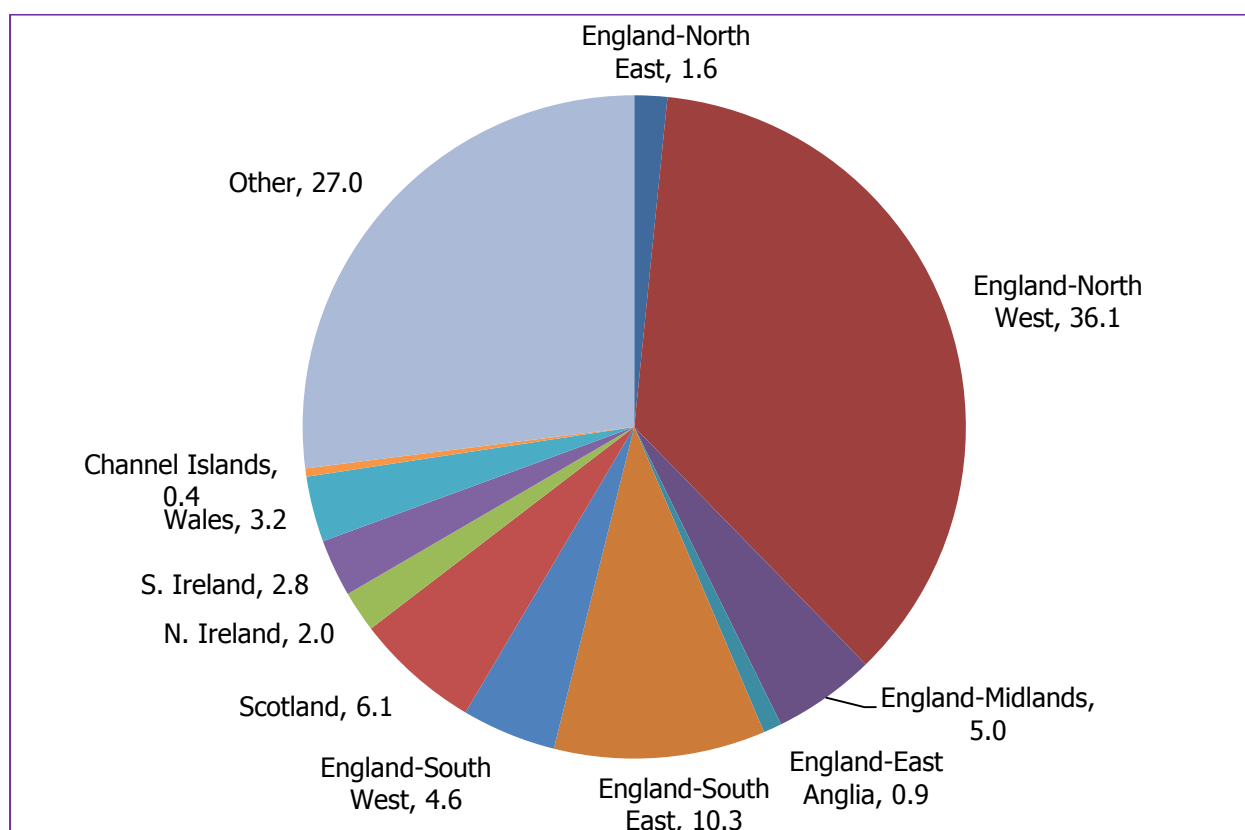


Table 18 Main Destination of Residents (Air) (%) 2017

Destination	PVPA	VFR	BV	DV	All
England-North East	1.0	1.4	0.7	1.2	1.1
England-North West	20.9	25.3	23.4	94.3	29.6
England-Yorks/Humberside	0.0	0.0	0.0	0.0	0.0
England-Midlands	3.7	8.1	4.2	0.1	4.5
England-East Anglia	0.5	1.0	1.4	0.7	0.7
England-South East	12.3	19.1	29.9	3.1	15.1
England-South West	2.9	3.8	7.3	0.0	3.4
Scotland	1.9	2.6	2.8	0.0	2.0
N. Ireland	1.3	2.7	1.6	0.1	1.5
S. Ireland	2.4	5.0	4.9	0.5	3.1
Wales	0.5	2.1	0.8	0.0	0.9
Channel Islands	0.3	0.5	2.5	0.0	0.6
Other	52.3	28.4	20.4	0.0	37.4
Total	100.0	100.0	100.0	100.0	100.0

Table 19 Main Destination of Residents (Sea) (%) 2017

Destination	PVPA	VFR	BV	DV	All
England-North East	2.1	3.1	2.3	0.6	2.3

England-North West	36.7	53.7	60.1	95.8	45.4
England-Yorks/Humberside	0.0	0.0	0.0	0.0	0.0
England-Midlands	5.3	6.8	11.3	0.3	5.8
England-East Anglia	0.9	0.7	8.2	0.0	1.1
England-South East	3.8	3.4	1.7	0.3	3.4
England-South West	7.4	5.4	6.9	0.0	6.5
Scotland	16.1	6.8	3.2	0.0	12.1
N. Ireland	1.4	5.9	1.4	0.0	2.7
S. Ireland	1.2	4.6	0.9	1.4	2.2
Wales	7.1	7.1	1.2	0.8	6.6
Channel Islands	0.0	0.1	0.0	0.0	0.0
Other	17.9	2.3	2.7	0.9	11.9
Total	100.0	100.0	100.0	100.0	100.0

Appendix I Sample Size by Category of Passenger and Quarter, 2017

	RES	PVPA	VFR	BV	DV	Total
January to April	2,323	170	536	402	25	3,456
May to June	658	369	196	145	17	1,385
July to September	1,843	519	382	199	12	2,955
October to December	1,971	158	311	192	11	2,643
Total	6,795	1,216	1,425	938	65	10,439

Appendix II 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. **(Residents only)** What is the reason for travelling?

1 Holiday or visiting friends and family

2 Leaving IOM

3 Business

4 Hospital visit

8. **(Residents leaving IOM only)** What is your reason for leaving the Isle of Man?

1 New job off island

2 No work available on the island

3 Move closer to friends/family

4 Cost of living

5 Other

9. How many of you are travelling together?

Answer:

10. How many of your group are:-

0-15.....

16-30....

31-45....

46-60....

Over 60....

11. (Non-residents only) Is this trip in connection with your work?

1 Yes

2 No

12. How many nights stay does this trip include?

Answer:

13. Did you stay mainly in paid accommodation (include Homestay) or with friends or relatives?

1 In paid accommodation

2 With friends/relatives

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 have you done during your visit to the Island? (Select all that apply)

Motorsport – TT/MGP

Motorsport – Other

Cycling event

Sporting event – other

Outdoor activity:

walking/rambling, cycling,

kayaking etc.

Glens/parks/landscape

Heritage Railways

MNH sites

Theatre/concert

Personal event (wedding
etc.)

Visit family/friends

Other

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

1 Yes

2 No

17. (If Yes to Q16) How much did the package cost?

Answer:

18. (If Yes to Q16) How many does this cover?

Answer:

19. What is your main destination?

England-North East	Scotland
England-North West	N. Ireland
England-Yorks/Humberside	S. Ireland
England-Midlands	Wales
England-East Anglia	Channel Islands
England-South East	Other
England-South West	

20. (If No to Q16) What was the cost of your accommodation?

Answer:

21. How many people does this cover?

Answer:

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

Answer:

23. How many was this for?

Answer:

24. How much have you spent in total whilst in the Island?

Answer:

25. Whilst on the Island, how much have you spent on?

On-Island transport:

Admissions (Heritage sites, theatre, etc.):

Restaurants and bars:

Other:

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

Answer:

27. How many people does this cover?

Answer:

28. (Business Visitors only) Are you satisfied that there are a sufficient number of flights servicing the Isle of Man?

1 Yes

2 No

3 I don't know

29. (Business Visitors only) Are you satisfied that the flights servicing the Isle of Man are affordable?

- 1 Very satisfied
- 2 Satisfied
- 3 Dissatisfied
- 4 Very dissatisfied

30. (Business Visitors only) Overall, how satisfied are you with doing business on the Isle of Man?

- 1 Very satisfied
- 2 Satisfied
- 3 Dissatisfied
- 4 Very dissatisfied

Thank you for taking part in the Isle of Man Passenger Survey. Your response is greatly appreciated.



Isle of Man
Government

Reilrys Ellan Vannin



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