



Isle of Man
Government

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TT 2018

Visitor Survey

Department for Enterprise

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Contents

Introduction	3
Main Findings	3
Sample Size	3
Methodology	3
Table 1: Number of visitors by mode of travel	5
Table 2: Type of accommodation whilst in the Isle of Man	5
Table 3: Average number of nights spent on the Island by model of travel.....	5
Table 4: Visited the TT before (%).....	6
Table 5: Visits for other motorsport events (%)	6
Table 6(a): Country of residence – British Islands and Ireland (%)	6
Table 6(b): Country of residence – Europe (%).....	7
Table 6(c): Country of residence – Rest of World (%).....	7
Table 7: Age Profile.....	8
Table 8(a): Average Expenditure (£).....	8
Table 8(b) Total Expenditure (£millions)	8
Figure 1: Number of TT Visitors on Island each day	9
Figure 2: Total Passenger Departures from the Island	10
Figure 3: Passenger Departures by Air	11
Figure 4: Passenger Departures by Sea.....	12
Table 9: Sample size by type of passenger and model of travel	13
Sampling Error	13

TT 2018 Visitor Survey

Introduction

This is the latest in a series of reports 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 sixth survey of TT visitors in the series, similar surveys having been conducted in 2010, 2013, 2015, 2016 and 2017. 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 2018, with some comparisons from the previous surveys which have been conducted. Results for the surveys in 2010, 2013, 2015, 2016, and 2017 are available from the Department for Enterprise. Similar surveys have been commissioned for the Southern 100 and Festival of Motorcycling in 2018, and the results of those studies will be published later in the year.

Main Findings

The main findings of the TT 2018 survey are that:

- 44,367 visitors came for TT in 2018 – a slight decrease of 1.5% on the estimated number in 2017.
- On average, visitors stayed 6.7 nights in the Island and spent £886 on the trip. Total expenditure of TT visitors in 2018 is an estimated £37.1 million. This represents a contribution to Manx National Income of £26.8 million and an Exchequer Benefit of £4.8 million.
- As in previous years, the number of visitors in the island for TT peaked on “Mad Sunday”, reaching 26,600 in 2018.
- 63.5% had visited previously for TT, and 36.2% tend to visit for other motorsport events such as Festival of Motorcycling (MGP) and the Southern 100.

Sample Size

In total, 6,577 passengers were interviewed, of which 4,448 were visitors for the TT. The response rate was 99%. Further details of the sample size and sampling error are given in Table 9.

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.

Departures by Sea

Interviews were conducted with departing passengers on each of the days between the Monday of Practice Week (28 May) and the Wednesday following Senior Race day (13 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.

Expenditure

Average expenditure in Table 8(a) has been calculated with regard to only those individuals which incurred that kind of expenditure, rather than being calculated as an average of all individuals visiting for the TT, regardless of whether they incurred that kind of expenditure, such as those staying with friends or family who did not incur accommodation costs, or those not on a package deal. This change in methodology allows for a better representation of the average expenditure incurred by different types of visitors. As previous years reports were prepared by other external organisations, it has not been possible to restate these figures on a similar basis.

Total expenditure is however unaffected by this change along with Table 8(b) on total expenditure.

Acknowledgements

We are extremely grateful for cooperation and assistance supplied by:

Airports Division, Department of Infrastructure

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Isle of Man Steam Packet Company

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

Motorsport

Department for Enterprise

Table 1: Number of visitors by mode of travel

Mode of Travel	2010	2013	2015	2016	2017	2018
Air	7,781	11,702	12,560	13,414	14,662	14,451
Sea	23,006	27,522	29,571	29,006	30,392	29,926
Of which, travelling by:						
Foot	4,743	7,859	7,640	6,892	6,553	7,759
With motorcycle	11,709	12,227	14,720	14,444	15,362	14,531
With other type of vehicle	6,554	7,436	7,211	7,670	8,477	7,636
Total	30,787	39,224	42,131	42,420	45,054	44,367

Table 2: Type of accommodation whilst in the Isle of Man

Accommodation	Number	%
Camping*	15,707	36%
Hotel/Guest House	8,326	19%
Homestay	8,321	19%
With friends/relatives	6,297	14%
Self-catering	3,389	8%
Other**	1,877	4%
Total***	43,917	100%

* Includes Paddock, motorhome and caravan

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

*** Excludes 450 visitors who were on a day trip

Table 3: Average number of nights spent on the Island by model of travel

Mode of Travel	2010	2013	2015	2016	2017	2018
Air	5.4	5.3	6.0	5.7	5.7	5.4
Sea	6.9	7.0	7.4	7.1	6.8	7.3
Total	6.5	6.5	7.0	6.6	6.5	6.7

Table 4: Visited the TT before (%)

	2018
Visited previously	63.5
of which, visited:	
2 to 5 times	32.8
6 to 10 times	11.9
11 to 20 times	8.0
More than 20 times	10.8

Table 5: Visits for other motorsport events (%)

	2010	2013	2015	2016	2017	2018
Visited other events	24.1	23.8	26.0	21.8	23.6	36.2
If yes, which event(s):						
Festival of Motorcycling	72.2	79.9	69.2	79.0	83.7	86.2
Southern 100	18.7	29.0	34.4	35.6	32.0	15.0
Pre TT	-	-	-	-	-	22.2
Other	-	-	-	-	-	3.0

The 2018 survey collected additional information compared with previous years by explicitly asking about those who may have visited for the Pre-TT racing events. As the event is held on the Southern 100 course, respondents in previous years may have indicated that they had attended the Southern 100 when they may have meant to indicate the Pre-TT event. The same question will be used in 2019 to examine this change.

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

	2010	2013	2015	2016	2017	2018
England	62.7	69.8	63.5	68.6	67.1	64.1
N. Ireland	9.2	5	6.9	7.7	7.1	5
Wales	3.1	3.3	3.9	4.9	4.9	3.7
Republic of Ireland	4.8	3.5	4	2.9	2.3	2.6
Scotland	4	3.5	4.3	2.4	4.4	2.8
Channel Islands	0	0	0	0.1	0.1	0.3
Total	83.8	85.1	82.6	86.6	85.9	78.5

Table 6(b): Country of residence – Europe (%)*

Country	%	Country	%
Germany	3.6	Romania	0.0
France	2.6	Czech Republic	0.1
Italy	0.8	Latvia	0.0
Netherlands	1.6	Belgium	0.0
Austria	0.5	Hungary	0.0
Switzerland	0.6	Denmark	0.3
Spain	1.0	Bulgaria	0.0
Sweden	0.4	Lithuania	0.1
Luxembourg	0.0	Slovenia	0.1
Greece	0.0	Finland	0.1
Norway	0.3	Slovakia	0.1
Poland	0.2	Gibraltar	0.0
Portugal	0.2	Total	12.6

Table 6(c): Country of residence – Rest of World (%)*

Country	%	Country	%
Australia	3.0	Nigeria	0.0
Canada	0.5	Nepal	0.0
USA	2.9	India	0.1
China	0.0	Croatia	0.0
Japan	0.3	Philippines	0.0
New Zealand	1.0	Argentina	0.1
South Africa	0.4	Zimbabwe	0.0
Israel	0.0	Malta	0.0
Uruguay	0.1	Indonesia	0.0
Bermuda	0.0	Saudi Arabia	0.0
Thailand	0.0	Total	8.4

*Percentages of 0.0 refer to small but non-zero numbers of visitors in these categories

Table 7: Age Profile

Age	Number	%
Under 18	1,242	2.8
18-29	5,368	12.1
30-49	18,901	42.6
50-64	14,419	32.5
65 and over	4,437	10
Total	44,367	100

Table 8(a): Average Expenditure (£)

	2010	2013	2015	2016	2017	2018
Travel to/from Island	160	176	210	188	191	221
Accommodation	136	146	175	151	157	183
Package*	-	-	-	-	-	1,218
Whilst on Island	324	346	321	399	409	421
Total	620	668	706	738	757	886

*Package trips are where both travel and accommodation were paid for as one purchase. In previous years this spending was apportioned across Travel and Accommodation spending, however the numbers of visitors reporting spending as a package was significant enough in 2018 to warrant a separation of this data into its own category.

Table 8(b) Total Expenditure (£millions)

	2010	2013	2015	2016	2017	2018
Travel to/from Island	4.9	6.9	8.8	8	8.6	9.0
Accommodation	4.2	5.37	7.4	6.4	7.1	7.2
Package						2.2
Whilst on Island	9.9	13.6	13.5	16.9	18.4	18.7
Total	19	26.2	29.7	31.3	34.1	37.1
Contribution to National Income*	13.7	18.9	21.4	22.5	24.6	26.8
Exchequer benefit**	2.6	3.5	3.9	4.1	4.4	4.8

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

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

Figure 1: Number of TT Visitors on Island each day

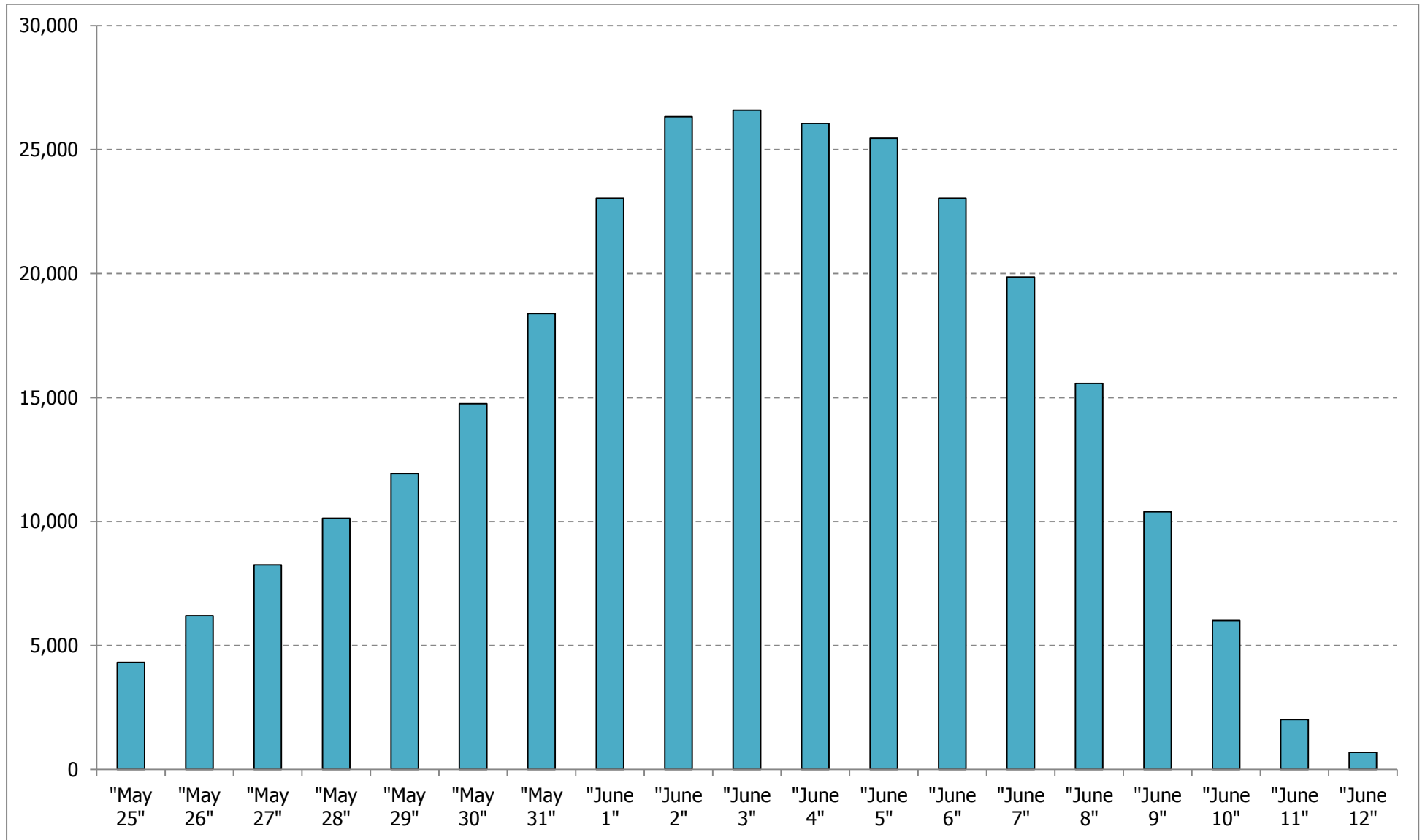


Figure 2: Total Passenger Departures from the Island

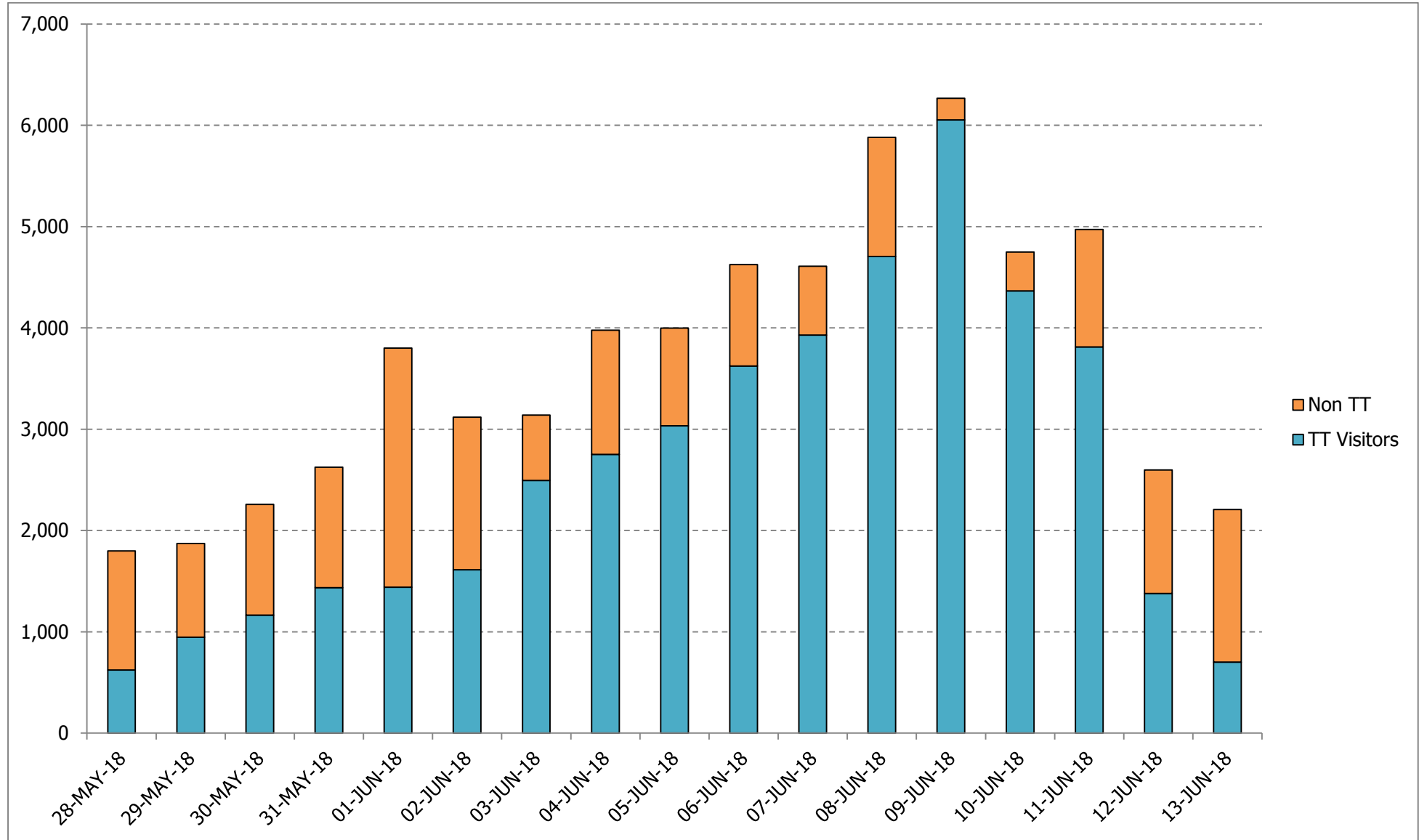


Figure 3: Passenger Departures by Air

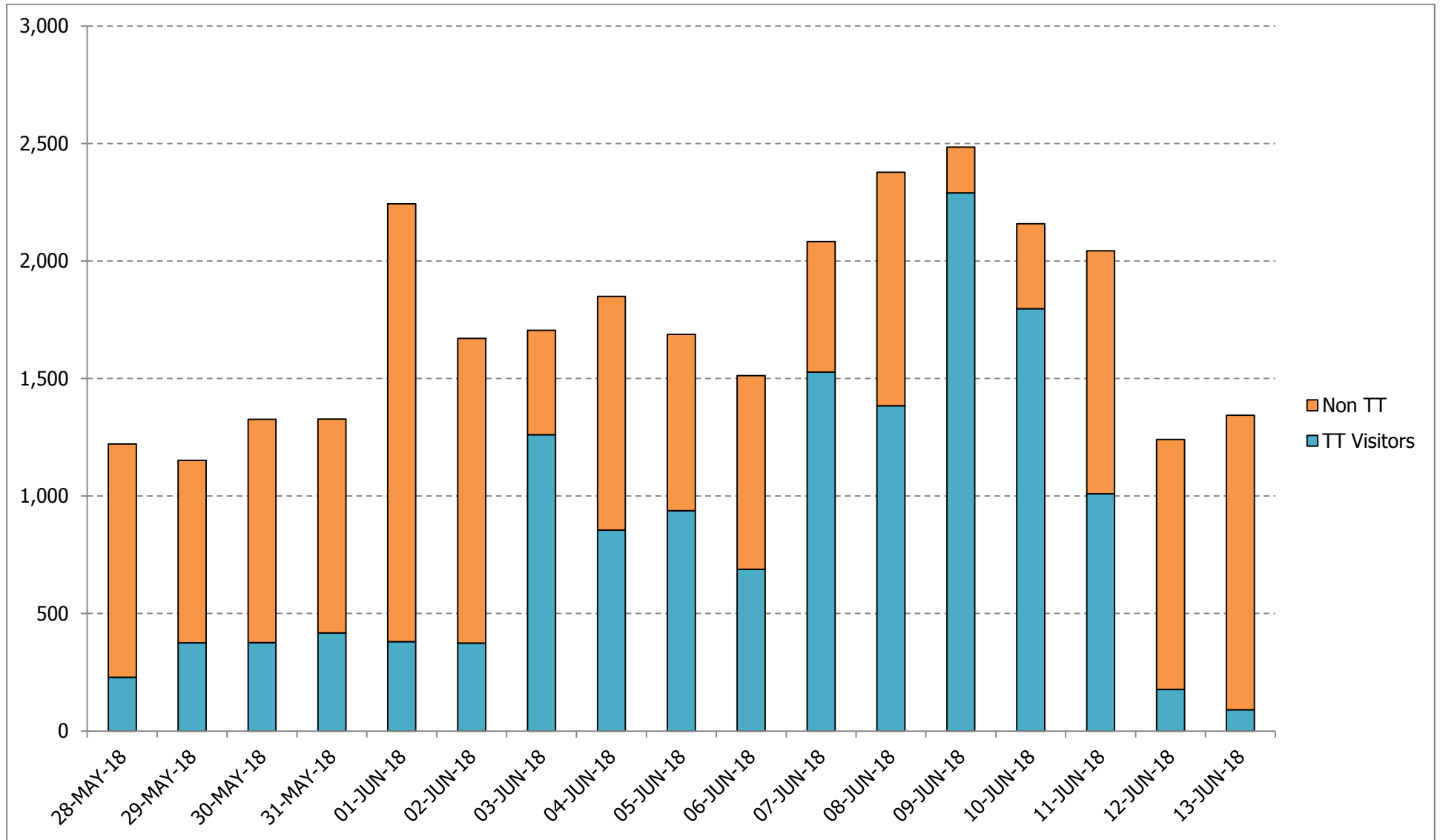


Figure 4: Passenger Departures by Sea

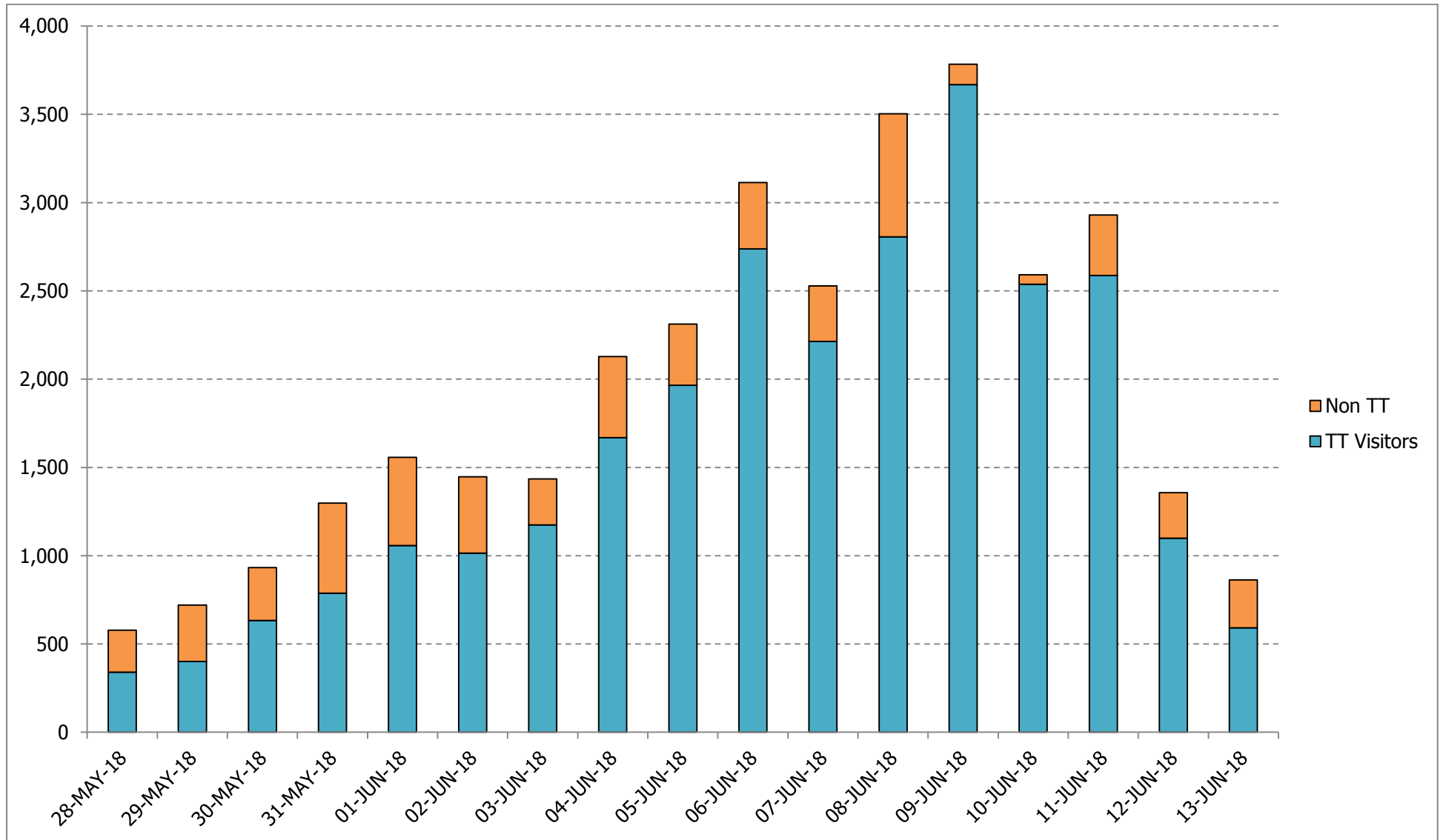


Table 9: Sample size by type of passenger and model of travel

	TT	Other	Resident	Total
Air	981	366	914	2,261
Sea	3,497	173	646	4,316
Total	4,478	539	1,560	6,577

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 proportion¹, we can estimate that the 95% confidence interval for the number of TT visitors is +/- 499 from the estimate of 44,367. 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 43,868 and 44,866.

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.

¹ Estimated standard error = $[p(1-p)/n]^{1/2}$, where p=the proportion with the characteristic of interest and n= sample size



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