



Isle of Man
Government

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Isle of Man Passenger Survey 2018

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Summary of Results – Isle of Man Passenger Survey 2018

- Total scheduled passenger departures increased over the year by 0.5%, to 691,256 in 2018 compared to 687,981 in 2017.
- The number of visitors during 2018 increased by 0.8% to 308,263. Resident travel increased by 0.2% to 382,993. For both residents and visitors, all increases are accounted for by a rise in air travel of 5.2%. Total sea travel in 2018 fell by -6.0%.
- The number of non-business visitors staying in paid accommodation decreased very slightly by -0.7%.
- Business visitors to the Island have increased significantly by 10.1%. Business visitors travelling by air increased by 24.0%, while business visitors by sea have decreased by -31.8%.
- The estimated total expenditure by visitors to the Island during 2018 increased by 7.3% to £132.8m, and average visitor spend increased by 12.2% to £489.
- The majority of residents leaving the Island were either travelling to the North West of England (36.2%) or outside of the UK and Ireland (27.6%).

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.

There has been a change to the weighting methodology for the Passenger Survey with respect to sea passengers. For 2016, 2017 and 2018 the sea departure data now incorporates passenger origination data. This means that for sea passengers, monthly data is provided at an aggregate level discerning between those passengers on the outward (or first) journey of a return trip, and those on the return (or second) journey of a return trip. Therefore, the ratio of residents to visitors for sea passengers is no longer considered an estimate, but is a known figure. The same data is not yet available from all airlines, and therefore the same ratio cannot be applied to air departures. Due to this new data source, figures for 2016 and 2017 may no longer match what was previously published under the previous estimation process.

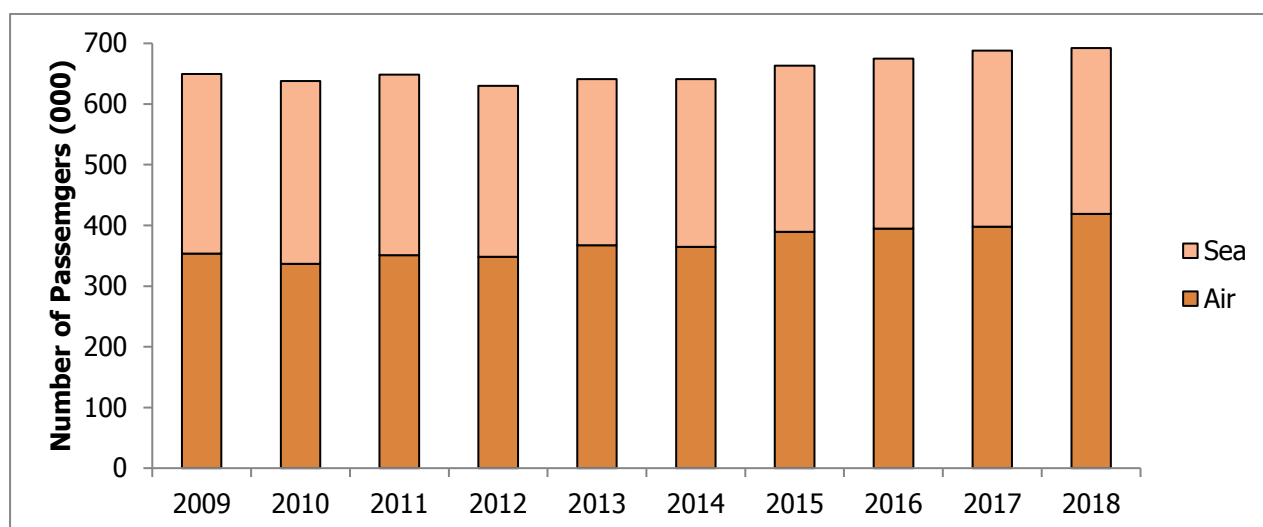
Throughout this report individual entries have been rounded independently and as a result columns may not appear to sum to column totals. This is simply a result of rounding and the un-rounded entries do sum correctly.

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:

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Isle of Man
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Email: economics@gov.im

Scheduled Passenger Departures

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



During 2018, there were 418,371 passengers who departed the Island by air, and 272,885 passengers who departed by sea.

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

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Q1	164.8	163.0	176.4	159.4	158.2	163.1	161.0	171.4	175.9	173.9
Q2	134.5	132.1	136.6	134.8	141.7	140.6	148.8	144.4	150.6	151.2
Q3	217.7	216.5	209.8	206.3	212.7	210.4	220.5	223.2	224.9	226.5
Q4	132.6	126.5	125.8	129.6	128.6	127.1	133.2	136.1	136.2	139.6
Total	649.6	638.1	648.6	630.1	641.2	641.2	663.5	675.1	688.0	691.3

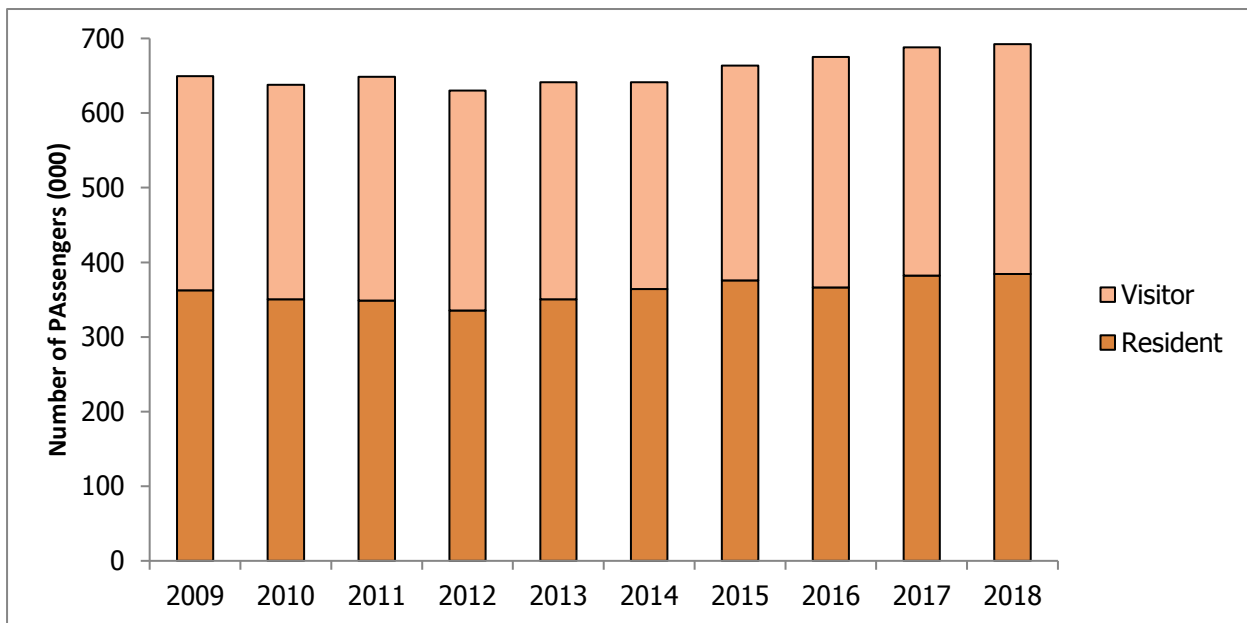
Table 2 Scheduled Air Passenger Departures, by Quarter ('000)

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Q1	105.2	98.4	103.4	104.4	106.4	111.2	112.4	122.3	121.3	122.1
Q2	63.6	59.3	63.6	62.6	69.4	68.4	74.9	72.9	75.2	80.6
Q3	96.6	95.3	96.5	91.3	100.1	95.2	105.5	102.2	104.1	112.7
Q4	88.2	83.6	87.4	89.9	91.6	89.9	96.6	97.2	97.0	103.0
Total	353.7	336.6	350.9	348.3	367.5	364.7	389.4	394.6	397.6	418.4

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

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Q1	59.6	64.6	73.0	55.0	51.8	51.9	48.6	49.2	54.6	51.8
Q2	70.9	72.8	73.0	72.1	72.3	72.2	73.9	71.5	75.4	70.7
Q3	121.1	121.2	113.3	115.0	112.6	115.2	115.0	121.0	120.8	113.8
Q4	44.4	42.9	38.4	39.7	37.0	37.2	36.6	38.8	39.5	36.7
Total	295.9	301.5	297.7	281.8	273.7	276.5	274.1	280.5	290.2	272.9

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



During 2018, there were 382,993 residents and 308,263 visitors departing from the Isle of Man.

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

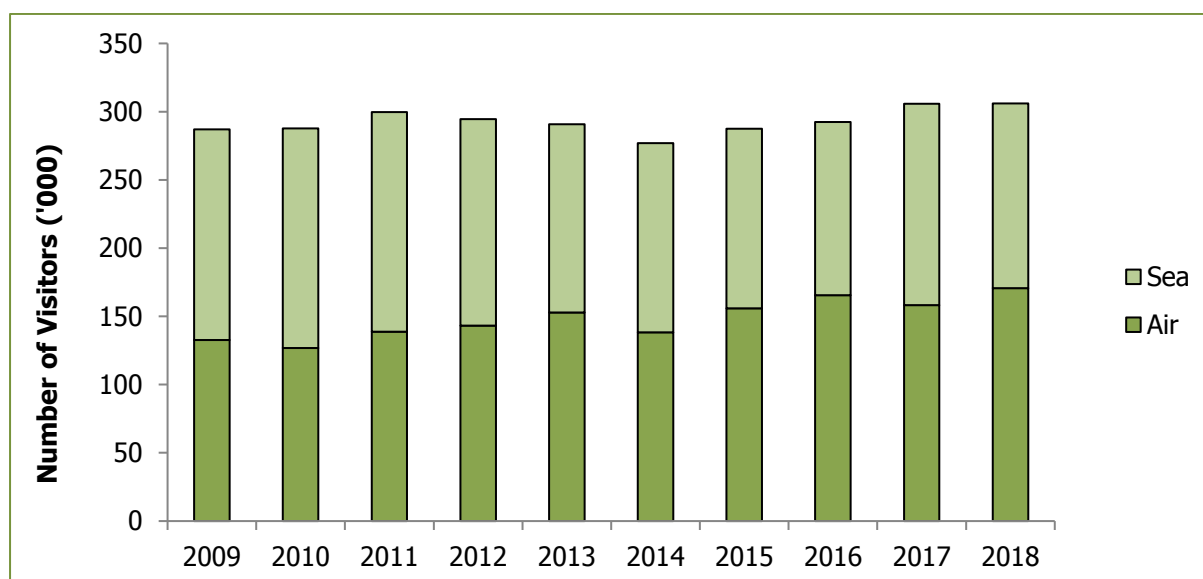
Type	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Resident	221.0	209.9	212.2	205.0	214.8	226.5	233.5	229.1	239.5	247.9
Visitor	132.7	126.7	138.7	143.3	152.7	138.2	155.9	165.4	157.9	170.5
Total	353.7	336.6	350.9	348.3	367.5	364.7	389.4	394.6	397.4	418.4

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

Type	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Resident	141.4	140.4	136.6	130.7	135.7	137.8	142.4	137.4	142.7	135.1
Visitor	154.5	161.1	161.1	151.1	138.0	138.7	131.6	143.1	147.5	137.8
Total	295.9	301.5	297.7	281.8	273.7	276.5	274.1	280.5	290.2	272.9

Visitors

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



During 2018, there were 170,450 visitors who departed by air, and 137,813 visitors who departed by sea. Total visitors during the period amounted to 308,263.

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

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Q1	64.7	67.7	69.2	65.0	61.8	55.6	52.6	70.6	66.7	68.3
Q2	76.8	68.0	75.3	78.1	82.5	79.3	92.2	82.6	90.5	82.3
Q3	105.3	109.0	112.3	107.3	100.5	103.2	100.1	106.0	107.5	109.0
Q4	40.3	43.0	43.0	44.1	45.9	38.8	42.6	49.4	41.0	48.8
Total	287.1	287.8	299.8	294.5	290.8	276.9	287.5	308.6	305.8	308.3

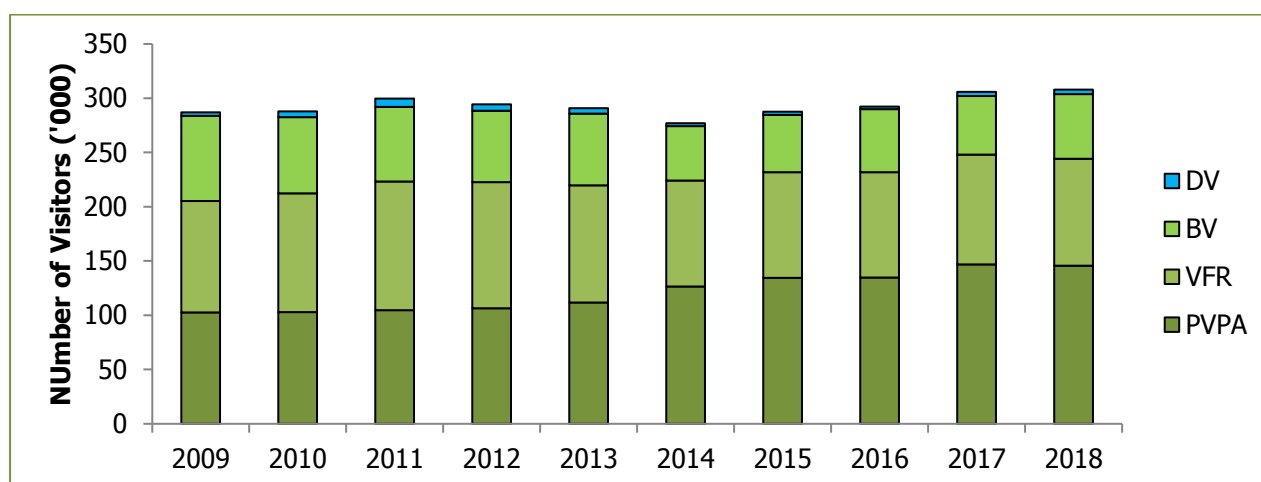
Table 7 Number of Visitors by Air, by Quarter ('000)

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Q1	39.6	39.5	38.8	41.2	42.2	38.1	36.1	50.8	44.6	48.4
Q2	29.2	20.5	26.3	29.8	34.5	34.2	41.9	38.1	41.5	37.1
Q3	37.5	38.8	43.0	41.4	40.4	36.9	45.1	41.5	45.1	50.2
Q4	26.3	27.9	30.6	30.9	35.7	28.9	32.7	35.1	27.0	34.9
Total	132.7	126.7	138.7	143.3	152.7	138.2	155.9	165.4	158.2	170.5

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

Quarter	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Q1	25.2	28.3	30.4	23.8	19.6	17.5	16.5	19.8	22.1	19.9
Q2	47.5	47.5	49.0	48.3	48.0	45.0	50.2	44.5	49.0	45.2
Q3	67.8	70.2	69.3	65.8	60.1	66.3	55.0	64.5	62.4	58.8
Q4	14.0	15.1	12.4	13.2	10.3	9.9	9.9	14.3	14.0	13.9
Total	154.5	161.1	161.1	151.1	138.0	138.7	131.6	143.1	147.5	137.8

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



During 2018, there were 145,738 passengers staying in paid accommodation on the Island, 98,910 staying with friends or family, 59,565 business visitors and 4,051 day trippers.

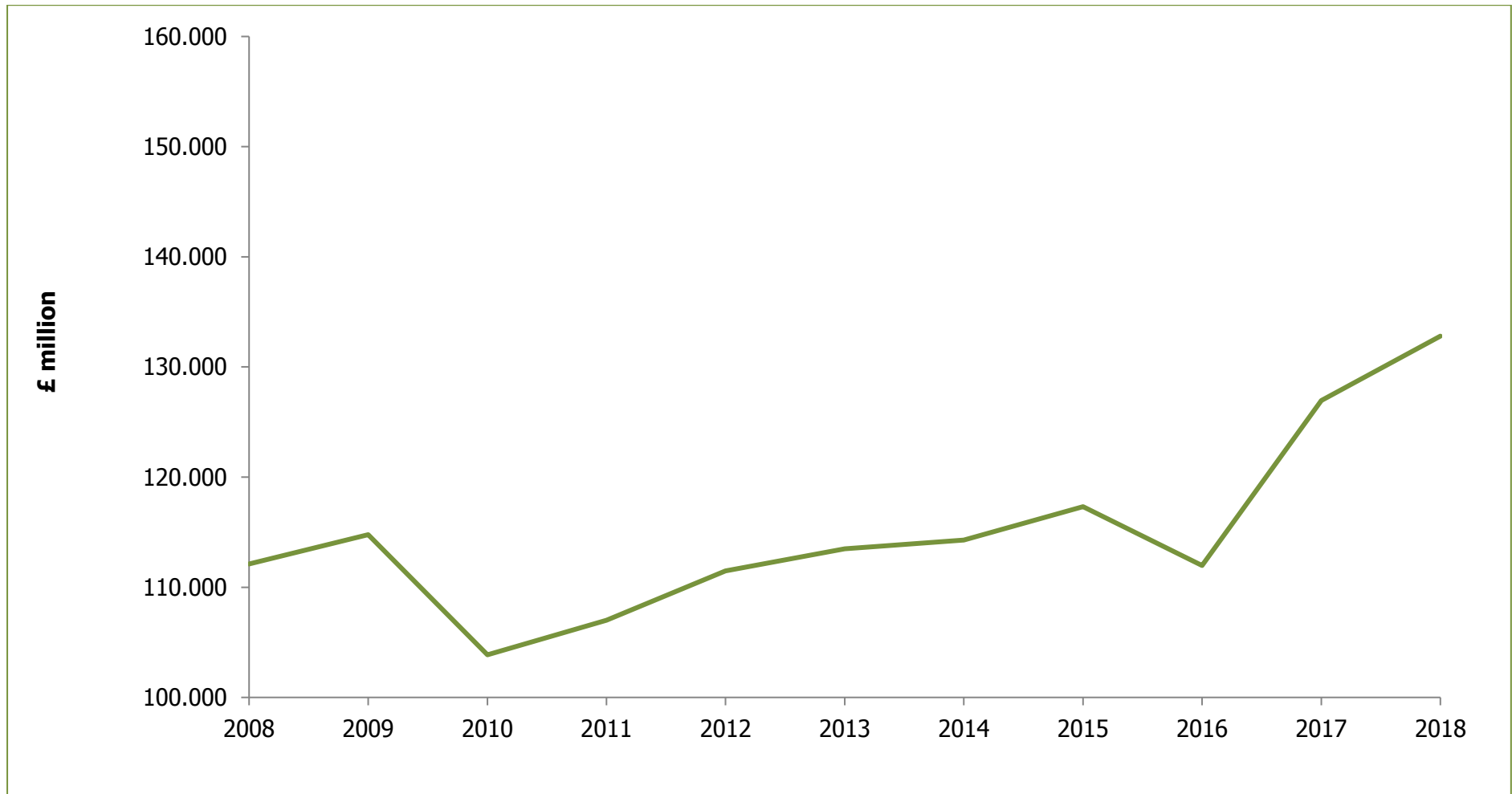
Table 9 Number of Visitors by Air, by Type of Visitor ('000)

Visitor type	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
PVPA	26.6	23.0	26.1	27.5	35.3	42.3	56.4	55.5	59.6	57.4
VFR	44.3	46.9	55.2	58.9	60.3	52.9	52.5	58.4	55.7	59.5
BV	61.0	54.6	54.2	53.4	53.6	41.2	44.5	49.3	40.4	50.2
DV	0.8	2.3	3.2	3.5	3.6	1.7	2.6	2.3	2.6	3.4
Total	132.7	126.7	138.7	143.3	152.7	138.2	155.9	165.4	158.2	170.5

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

Visitor type	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
PVPA	76.0	80.0	78.6	78.8	76.7	84.1	78.2	84.0	87.2	88.4
VFR	58.4	62.5	63.5	57.5	47.4	44.8	44.8	47.7	45.6	39.5
BV	17.5	15.8	14.4	12.1	12.7	8.9	8.2	11.2	13.7	9.3
DV	2.6	2.9	4.6	2.6	1.2	0.9	0.3	.2	1.1	0.7
Total	154.5	161.1	161.1	151.1	138.0	138.7	131.6	143.1	147.5	137.8

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



Note: Visitor expenditure has been stated at constant values as at December 2018.

Table 11 Total Visitor Expenditure, by Type of Expenditure (£million) 2018

		Travel to/from the			
		Island	Accommodation	Other	Total
All Visitors	Air	15.7	11.5	38.1	65.3
	Sea	18.0	17.5	32.0	67.5
	Total	33.6	29.1	70.1	132.8
of which:					
PVPA	Air	5.2	8.1	19.3	32.7
	Sea	11.3	15.7	25.4	52.4
	Total	16.6	23.8	44.7	85.1
VFR	Air	6.2	0.1	8.6	14.8
	Sea	4.9	0.2	4.7	9.8
	Total	11.0	0.3	13.3	24.6
BV	Air	3.8	3.3	10.1	17.2
	Sea	1.7	1.6	1.8	5.1
	Total	5.5	5.0	11.9	22.4
DV	Air	0.4	0.0	0.1	0.5
	Sea	0.1	0.0	0.1	0.2
	Total	0.5	0.0	0.2	0.7

Table 12 Average Expenditure, by Type of Expenditure (£) 2018

		Travel to/from the			
		Island	Accommodation	Other	Total
All Visitors	Air	115	111	225	451
	Sea	147	144	234	525
	Total	131	129	229	489
of which:					
PVPA	Air	107	165	338	609
	Sea	158	175	257	590
	Total	132	190	307	630
VFR	Air	108	0	145	253
	Sea	126	0	122	248
	Total	115	0	136	251
BV	Air	145	188	202	535
	Sea	241	233	196	670
	Total	165	201	201	567
DV	Air	139	0	25	164
	Sea	121	0	124	245
	Total	136	0	40	176

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 2018

		Average	Total
All Staying Visitors (exc. DV)	Air	4.9	754,214
	Sea	6.3	856,301
	Total	5.5	1,610,515
of which:			
PVPA	Air	4.1	233,454
	Sea	6.2	548,741
	Total	5.4	782,195
VFR	Air	6.3	372,901
	Sea	6.3	246,116
	Total	6.3	619,017
BV	Air	3.9	147,859
	Sea	6.9	61,444
	Total	4.5	209,303

Figure 6 Area of Residence (All Visitors) (%) 2018

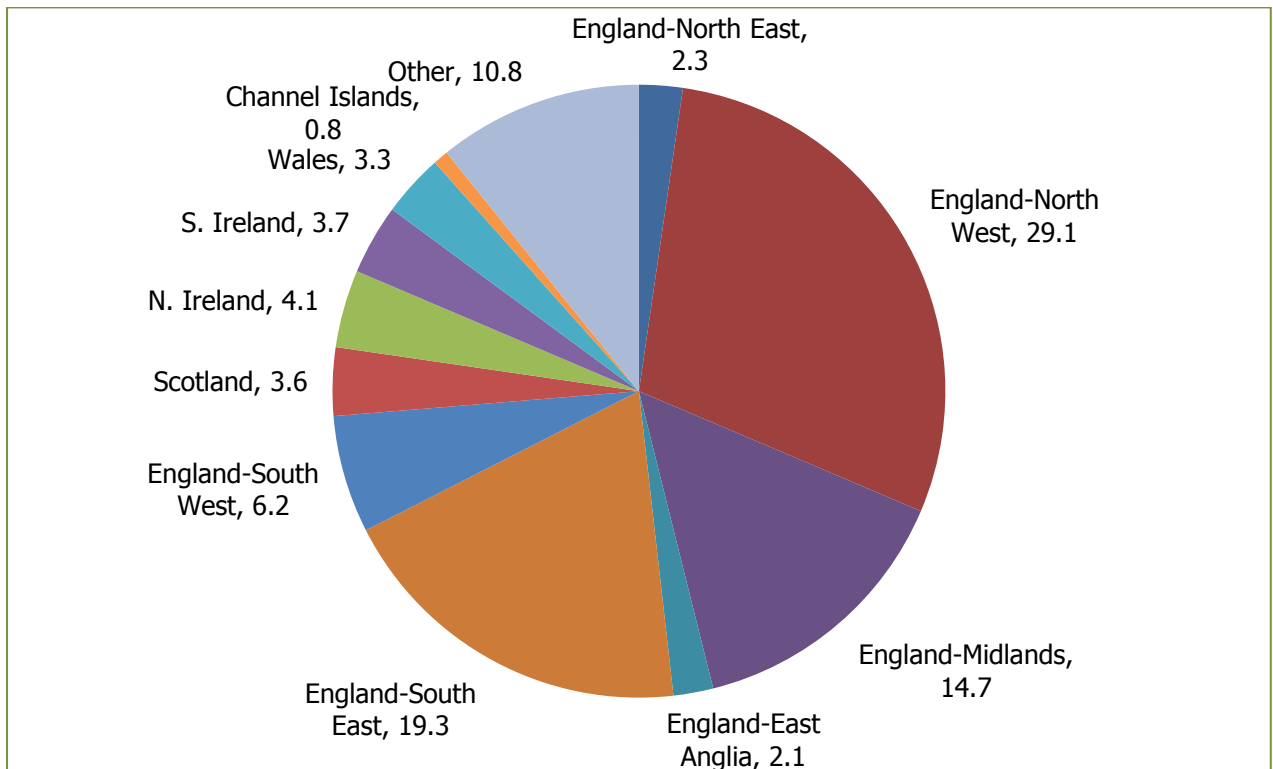


Table 14 Area of Residence (Visitors by Air) (%) 2018

Area	PVPA	VFR	BV	DV	All
England-North East	0.6	1.3	2.0	0.0	1.2
England-North West	27.4	22.7	29.0	52.5	26.7
England-Yorks/Humberside	0.0	0.0	0.0	0.0	0.0
England-Midlands	10.2	8.4	8.6	4.9	9.0
England-East Anglia	4.2	1.5	0.8	0.0	2.2
England-South East	20.0	30.9	23.0	11.6	24.5
England-South West	6.1	6.7	6.7	0.0	6.4
Scotland	2.7	3.6	4.0	3.2	3.4
N. Ireland	2.9	4.6	6.7	1.7	4.6
S. Ireland	4.9	4.6	3.0	5.8	4.2
Wales	3.2	1.1	2.4	6.7	2.3
Channel Islands	0.2	0.4	3.3	0.0	1.2
Other	17.8	14.4	10.3	13.7	14.3
Total	100.0	100.0	100.0	100.0	100.0

Table 15 Area of Residence (Visitors by Sea) (%) 2018

Area	PVPA	VFR	BV	DV	All
England-North East	3.3	4.3	3.4	0.0	3.6
England-North West	28.3	38.5	39.1	35.5	32.1
England-Yorks/Humberside	0.0	0.0	0.0	0.0	0.0
England-Midlands	22.9	17.6	31.1	36.9	22.0
England-East Anglia	1.4	3.4	2.8	0.0	2.0
England-South East	14.9	9.9	6.2	0.0	12.8
England-South West	5.7	6.8	4.8	0.0	5.9
Scotland	3.9	4.8	1.0	0.0	4.0
N. Ireland	3.5	4.4	1.4	0.0	3.6
S. Ireland	2.9	3.4	1.5	0.0	3.0
Wales	4.3	4.3	8.1	8.0	4.5
Channel Islands	0.2	0.4	0.0	0.0	0.3
Other	8.8	2.4	0.6	19.6	6.4
Total	100.0	100.0	100.0	100.0	100.0

Isle of Man Residents

Table 16 Number of Trips by Residents, by Type 2018

		Number of trips	% of Total Visitors
PVPA	Air	137,779	35.9
	Sea	79,572	20.8
	Total	217,351	56.7
VFR	Air	58,453	15.2
	Sea	43,042	11.3
	Total	101,495	26.6
BV	Air	30,088	7.8
	Sea	7,450	1.9
	Total	37,538	9.8
DV	Air	21,601	5.6
	Sea	5,008	1.3
	Total	26,609	6.9
Total	Air	247,921	64.7
	Sea	135,072	35.3
	Total	382,993	100.0

Table 17 Number of Nights Off-Island, by Type 2018

		Average	Total
All Residents (exc. DV)	Air	7.1	1,762,224
	Sea	6.1	826,840
	Total	6.6	2,589,064
of which:			
PVPA	Air	7.7	1,061,817
	Sea	6.5	512,683
	Total	7.3	1,574,500
VFR	Air	9.2	536,554
	Sea	6.5	276,198
	Total	8.1	812,752
BV	Air	6.2	159,883
	Sea	4.9	33,010
	Total	5.9	192,893

Figure 7 Main Destination of Residents (All Residents) (%) 2018

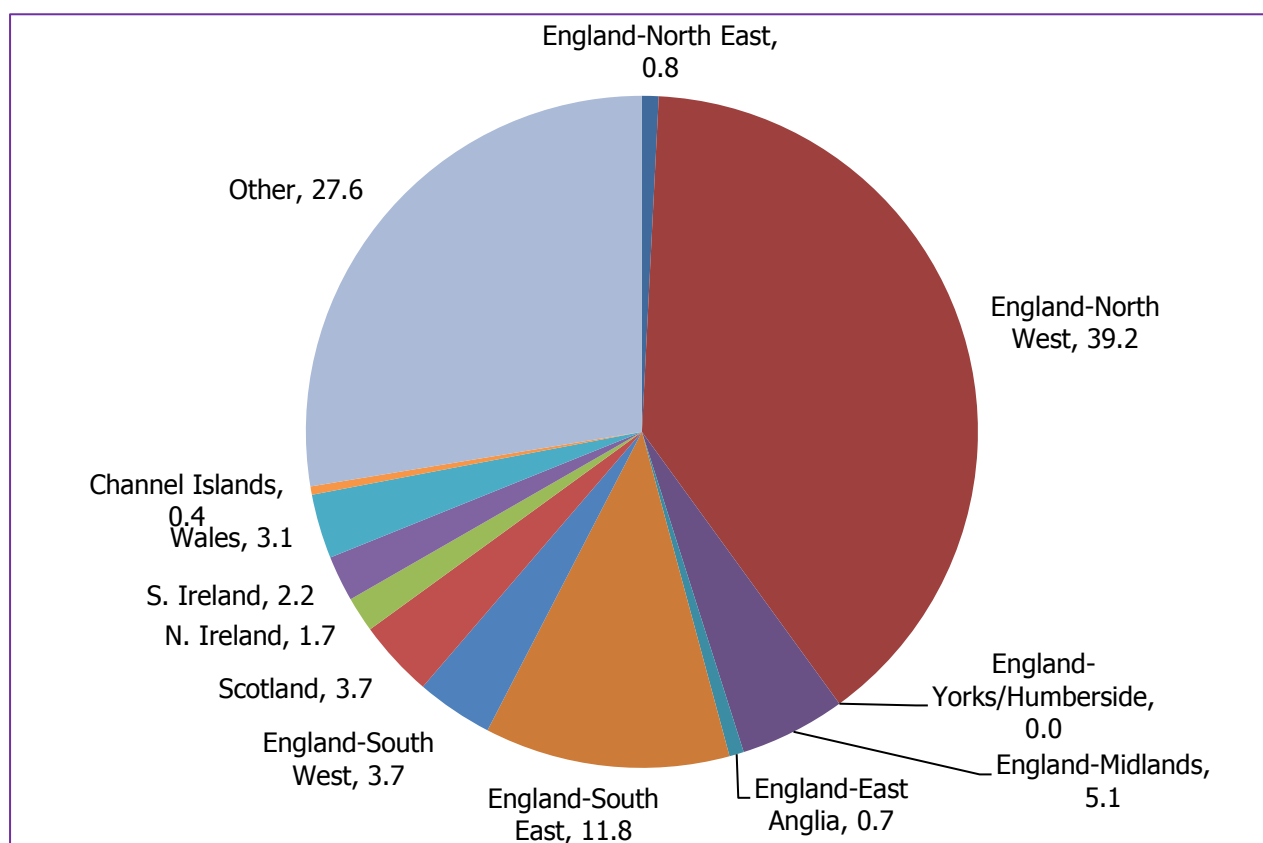


Table 18 Main Destination of Residents (Air) (%) 2018

Destination	PVPA	VFR	BV	DV	All
England-North East	0.3	0.4	1.1	0.0	0.4
England-North West	28.2	23.9	30.4	96.4	33.5
England-Yorks/Humberside	0.0	0.0	0.0	0.0	0.0
England-Midlands	3.1	7.1	6.7	0.3	4.2
England-East Anglia	0.3	1.2	0.0	0.0	0.5
England-South East	12.9	20.4	30.2	3.2	15.9
England-South West	2.5	4.2	3.7	0.0	2.8
Scotland	1.0	3.4	3.0	0.0	1.7
N. Ireland	1.4	1.7	0.4	0.1	1.3
S. Ireland	1.5	5.6	3.2	0.0	2.5
Wales	0.6	1.5	1.0	0.0	0.8
Channel Islands	0.5	0.7	1.2	0.0	0.6
Other	47.5	29.9	18.9	0.0	35.7
Total	100.0	100.0	100.0	100.0	100.0

Table 19 Main Destination of Residents (Sea) (%) 2018

Destination	PVPA	VFR	BV	DV	All
England-North East	1.0	2.5	1.9	3.1	1.6
England-North West	45.0	50.8	61.6	94.4	49.7
England-Yorks/Humberside	0.0	0.0	0.0	0.0	0.0
England-Midlands	4.7	10.3	11.4	0.5	6.7
England-East Anglia	0.7	1.4	2.6	0.0	1.0
England-South East	3.2	5.9	9.9	0.7	4.3
England-South West	5.4	6.5	3.7	0.0	5.4
Scotland	8.6	6.9	3.5	0.0	7.5
N. Ireland	1.7	4.3	0.2	0.0	2.4
S. Ireland	1.4	1.8	0.6	0.4	1.5
Wales	9.1	5.1	2.5	0.0	7.1
Channel Islands	0.0	0.0	0.0	0.0	0.0
Other	19.2	4.4	2.1	0.9	12.8
Total	100.0	100.0	100.0	100.0	100.0

Appendix I Sample Size by Category of Passenger and Quarter, 2018

	RES	PVPA	VFR	BV	DV	Total
January to April	2,627	194	403	314	24	3,562
May to June	982	378	230	133	8	1,731
July to September	1,484	525	320	204	15	2,548
October to December	1,671	182	324	227	16	2,420
Total	6,764	1,279	1,277	878	63	10,261

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.



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