



Isle of Man
Government

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TT 2019

Visitor Survey

Department for Enterprise

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TT 2019 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 seventh survey of TT visitors in the series, similar surveys having been conducted in 2010, 2013, and 2015 to 2018. The survey concentrates on estimating the total number of visitors 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 2019, with some comparisons from the previous surveys which have been conducted. Results from previous surveys are available from the Department for Enterprise. Similar surveys have been commissioned for the Southern 100 and Festival of Motorcycling in 2019, and the results of those studies will be published later in the year.

Main Findings

The main findings of the TT 2019 survey are that:

- 46,174 visitors came for TT in 2019 – an increase of 4.0% on the estimated number in 2018, and the highest figure recorded since the survey began.
- On average, visitors stayed 6.8 nights on the Island and spent £801 on the trip. Total expenditure of TT visitors in 2019 is an estimated £37.5 million. This represents a contribution to Manx National Income of £27.1 million and an Exchequer Benefit of £4.8 million.
- The number of visitors on the Island for TT peaked on Mad Sunday, reaching 28,188 in 2019.
- 64.9% had visited previously for TT, and 25.5% tend to visit for other motorsport events such as Festival of Motorcycling and the Southern 100.

Sample Size

In total, 6,325 passenger groups were interviewed, of which 4,345 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 (27 May) and the Wednesday following Senior Race day (12 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

Harbours Division, Department of Infrastructure

Isle of Man Steam Packet Company

Economic Affairs, Cabinet Office

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

Motorsport

Department for Enterprise

Table 1: Number of TT visitors by mode of travel

Mode of Travel	2010	2013	2015	2016	2017	2018	2019
Air	7,781	11,702	12,560	13,414	14,662	14,451	14,747
Sea	23,006	27,522	29,571	29,006	30,392	29,926	31,427
Of which, travelling by:							
Foot	4,743	7,859	7,640	6,892	6,553	7,759	7,617
With motorcycle	11,709	12,227	14,720	14,444	15,362	14,531	14,591
With other type of vehicle	6,554	7,436	7,211	7,670	8,477	7,636	9,219
Total	30,787	39,224	42,131	42,420	45,054	44,377	46,174

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

Accommodation	Number	%
Camping*	17,396	38%
Hotel/Guest House	8,608	19%
Homestay	8,133	18%
With friends/relatives	6,486	14%
Self-catering	4,003	9%
Other**	874	2%
Total***	45,500	100%

* Includes Paddock, motorhome and caravan

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

*** Excludes 674 visitors who were on a day trip

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

Mode of Travel	2010	2013	2015	2016	2017	2018	2019
Air	5.4	5.3	6.0	5.7	5.7	5.4	5.7
Sea	6.9	7.0	7.4	7.1	6.8	7.3	7.3
Total	6.5	6.5	7.0	6.6	6.5	6.7	6.8

Table 4: Visited the TT before (%)

	2018	2019
Visited previously	63.5	64.9
of which, visited:		
2 to 5 times	32.8	33.9
6 to 10 times	11.9	9.5
11 to 20 times	8.0	8.6
More than 20 times	10.8	12.9

Table 5: Visits for other motorsport events (%)

	2010	2013	2015	2016	2017	2018	2019
Visited other events	24.1	23.8	26.0	21.8	23.6	36.2	25.5
If yes, which event(s):							
Festival of Motorcycling	72.2	79.9	69.2	79.0	83.7	86.2	74.9
Southern 100	18.7	29.0	34.4	35.6	32.0	15.0	39.8
Pre TT	-	-	-	-	-	22.2	15.8
Other	-	-	-	-	-	3.0	8.2

The 2019 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.

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

	2010	2013	2015	2016	2017	2018	2019
England	62.7	69.8	63.5	68.6	67.1	64.1	57.8
N. Ireland	9.2	5	6.9	7.7	7.1	5	5.6
Wales	3.1	3.3	3.9	4.9	4.9	3.7	3.8
Republic of Ireland	4.8	3.5	4	2.9	2.3	2.6	3.6
Scotland	4	3.5	4.3	2.4	4.4	2.8	3.0
Channel Islands	0	0	0	0.1	0.1	0.3	0.2
Total	83.8	85.1	82.6	86.6	85.9	78.5	74.0

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

Country	%	Country	%
Germany	4.5	Romania	0.0
France	4.5	Czech Republic	0.1
Italy	0.9	Latvia	0.0
Netherlands	2.0	Belgium	0.4
Austria	0.4	Hungary	0.1
Switzerland	0.8	Denmark	0.1
Spain	0.5	Bulgaria	0.3
Sweden	0.6	Lithuania	0.1
Luxembourg	0.0	Slovenia	0.1
Greece	0.0	Finland	0.2
Norway	0.4	Slovakia	0.0
Poland	0.4	Gibraltar	0.0
Portugal	0.1	Total	16.5

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

Country	%	Country	%
Australia	2.4	Nigeria	0.1
Canada	0.3	Nepal	0.0
USA	3.4	India	0.0
China	0.1	Croatia	0.0
Japan	0.1	Mexico	0.1
New Zealand	0.6	Argentina	0.0
South Africa	0.5	Russia	0.1
Israel	0.0	Malta	0.0
Uruguay	0.0	Indonesia	0.0
Bermuda	0.1	Saudi Arabia	0.0
Thailand	0.0	Total	7.8

Note: Percentages of 0.0 refer to small but non-zero numbers of visitors in these categories.

There were a small number of cases where the country of residence was not provided by respondents. This accounts for 1.7% of individuals.

Table 7: Age Profile

Age	Number	%
Under 18	1,579	3.4
18-29	5,227	11.3
30-49	17,740	38.4
50-64	16,447	35.6
65 and over	5,181	11.2
Total	46,174	100

Table 8(a): Average Expenditure (£)

	2010	2013	2015	2016	2017	2018	2019
Travel to/from Island	160	176	210	188	191	221	236
Accommodation	136	146	175	151	157	183	198
Package*	-	-	-	-	-	1,218	1,270
Whilst on Island	324	346	321	399	409	421	365
Total	620	668	706	738	757	886	801

*Package trips include both travel and accommodation as one purchase. In previous years this spending was apportioned across Travel and Accommodation spending.

Total spending therefore takes into account both those who booked on a package trip and those who booked each element separately.

Table 8(b): Total Expenditure (£millions)

	2010	2013	2015	2016	2017	2018	2019
Travel to/from Island	4.9	6.9	8.8	8	8.6	9.0	9.8
Accommodation	4.2	5.37	7.4	6.4	7.1	7.2	7.8
Package						2.2	3.1
Whilst on Island	9.9	13.6	13.5	16.9	18.4	18.7	16.8
Total	19	26.2	29.7	31.3	34.1	37.1	37.5
Contribution to National Income*	13.7	18.9	21.4	22.5	24.6	26.8	27.1
Exchequer benefit**	2.6	3.5	3.9	4.1	4.4	4.8	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

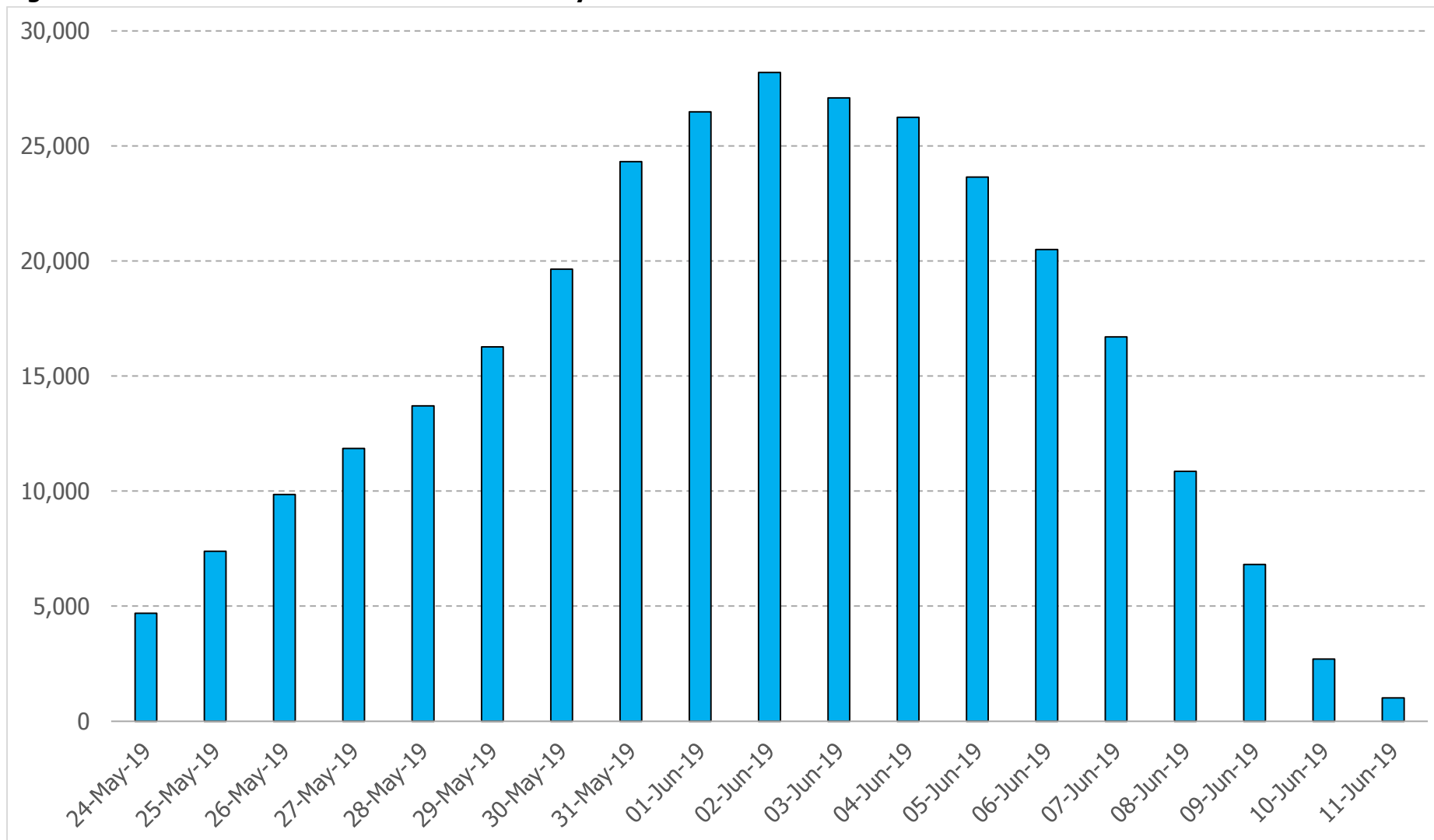


Figure 2: Total Visitor Passenger Departures from the Island

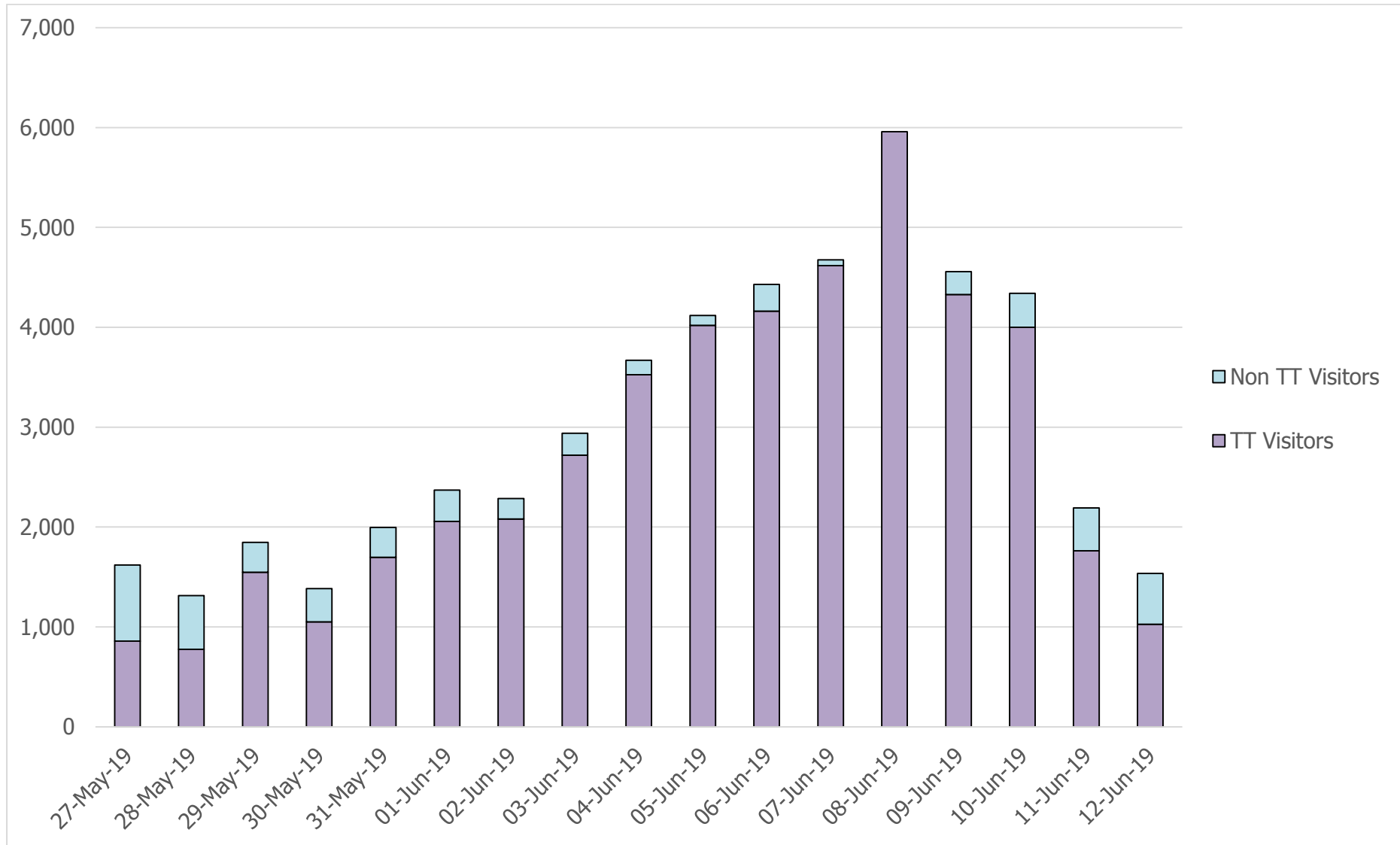


Figure 3: Visitor Passenger Departures by Air

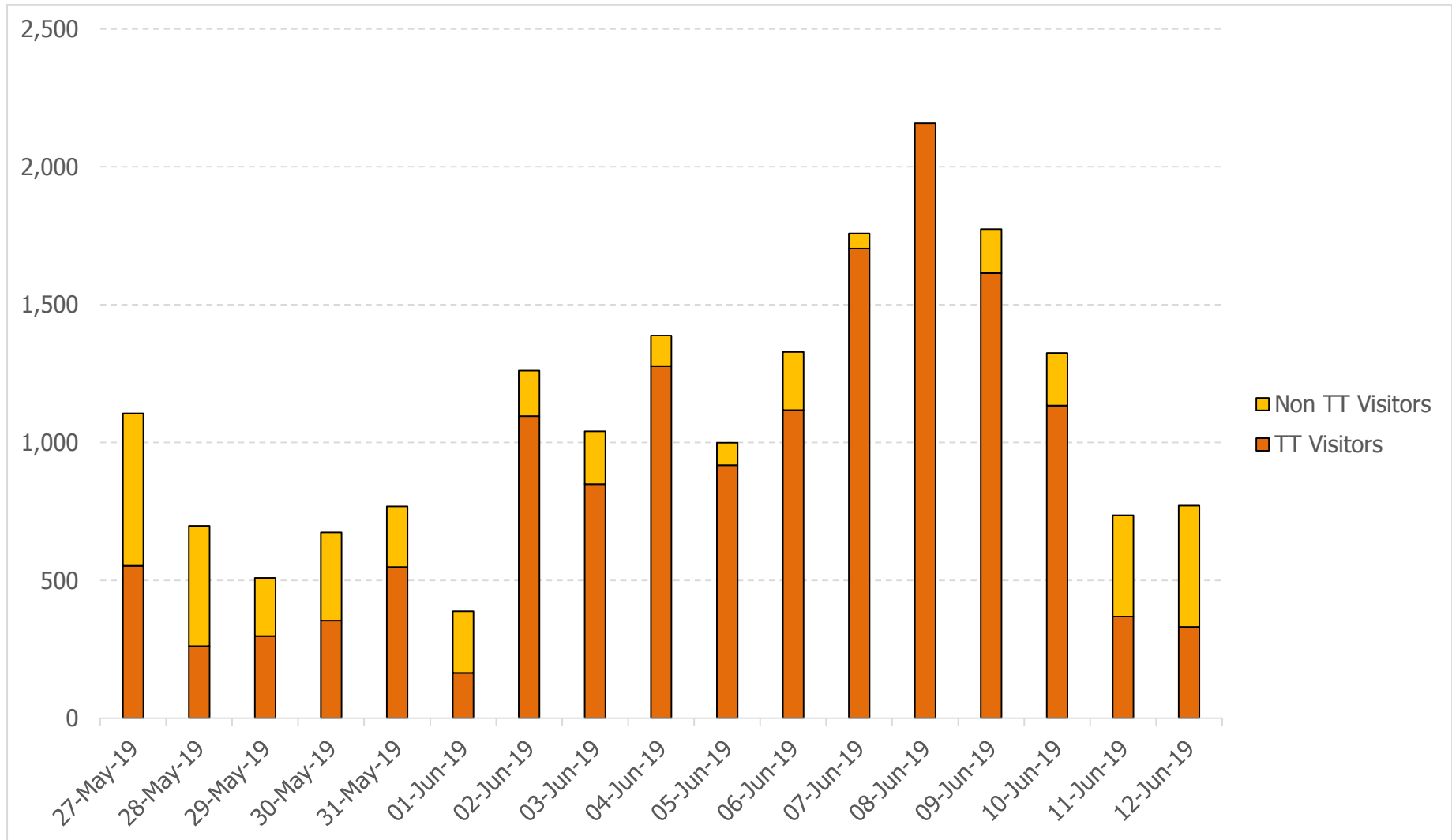


Figure 4: Visitor Passenger Departures by Sea

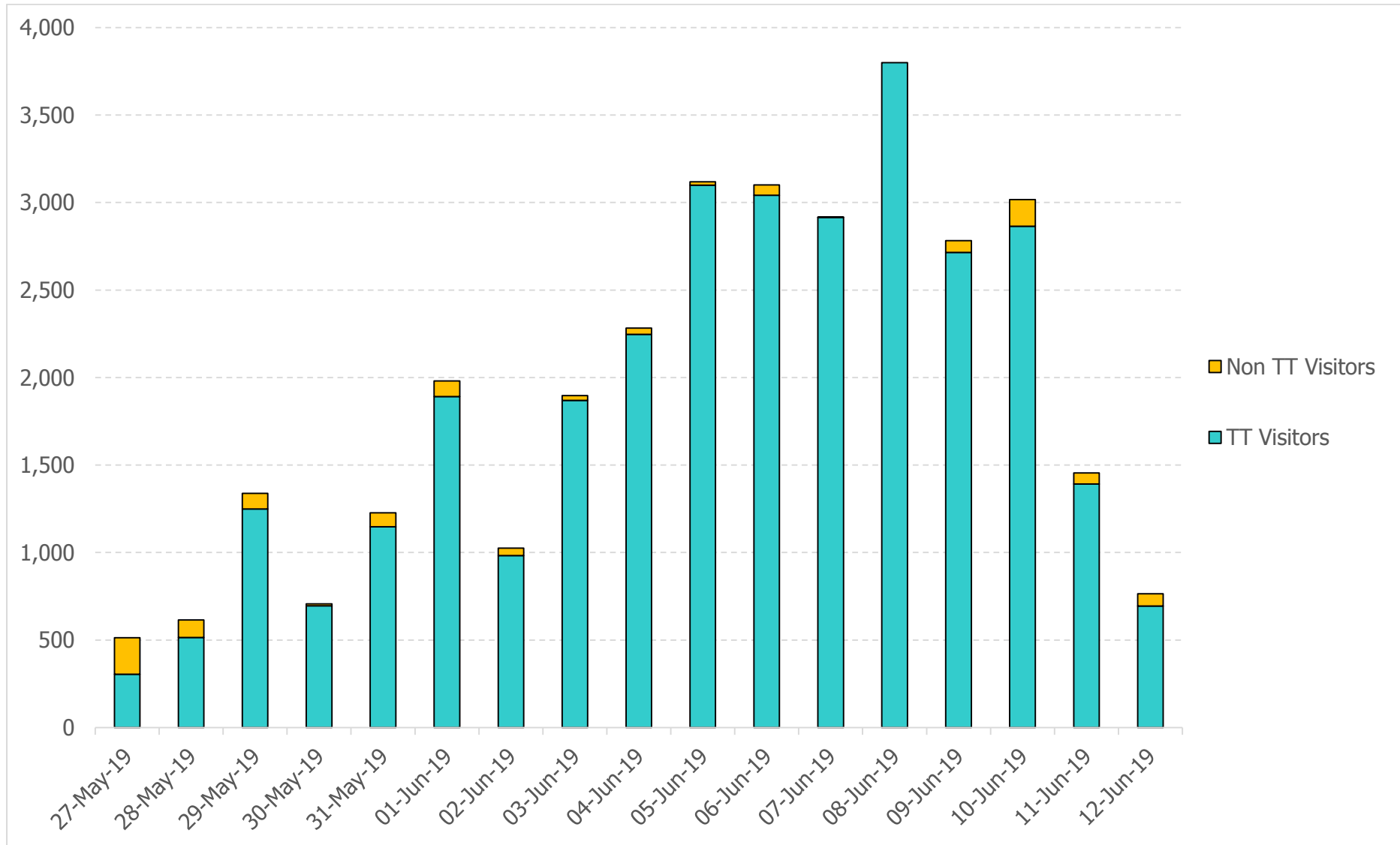


Table 9: Sample size by type of passenger and mode of travel

	TT	Other	Resident	Total
Air	984	424	982	2,390
Sea	3,361	206	368	3,935
Total	4,345	630	1,350	6,325

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 +/- 782 from the estimate of 46,174. 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 45,392 and 46,956.

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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