



Isle of Man
Government

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2019 Festival of Motorcycling Survey Report

Department for Enterprise

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Contents

Introduction	2
Key Findings.....	2
Sampling.....	2
Methodology	3
Table 1: Number of visitors for FOM by mode of travel.....	4
Table 2: Nature of accommodation whilst in Isle of Man.....	4
Table 3: Average number of nights spent in the Isle of Man by mode of travel.....	4
Table 4: Visited for FOM before (%)	5
Table 5: Visits for other motorsport events (%)*	5
Table 6: Country of residence (%).....	6
Table 7: Age profile (%).....	6
Table 8(a): Average expenditure (£).....	6
Table 8(b): Total expenditure (£m)	7
Table 9: Sample size by type of passenger and mode of travel	8
Chart 1: Daily visitor departures by air, 2019.....	9
Chart 2: Daily visitor departures by sea, 2019	10

Introduction

This is the seventh in a series of reports begun in 2009 with the aim of helping to investigate 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.

The study concentrates upon estimating the total number of visitors generated by the event, and the expenditure of these visitors. A range of additional survey questions are included on significant indicators such as length of stay, pattern of visits and country of residence.

The report contains results of the survey for 2019, with time-series comparisons of key results for previous surveys since 2009. Linked surveys have been conducted for the TT and Southern 100 events in 2019, and the results of those studies are available from the Department for Enterprise.

Key Findings

The main findings of the FOM 2019 survey are that:

- An estimated 16,019 visitors came to the Island for the Festival in 2019, a increase of 2.5% compared to the 2018 estimate and an increase of 80% on the estimated figure for 2009, the year that this event was first surveyed.
- The average visitor stayed 7.4 nights in the Island and spent £717 on the trip. Total expenditure of these visitors in 2019 is estimated at £11.4 million. This represents a contribution to Manx National Income of £8.3 million and an exchequer benefit of £1.5 million.
- 69.8% had visited the Island previously for the Festival, and 62.9% tend to visit for other motorsport event such as TT and Southern 100
- Most (69.0%) were from England, with 13.0% from the rest of the British Isles/Republic of Ireland and 18.0% from further afield.

Sampling

A total of 6,008 interviews were conducted, of which 1,876 were visitors for the Festival. Further details of the sample size and margins of error are given on page 8.

Methodology

The methodology used was consistent with that used for other surveys in the series. In-person interviews were conducted in the departure lounge and vehicle loading areas of the Sea Terminal, and in the departure lounge of Ronaldsway Airport.

Departures by Sea

Interviews were conducted with departing passengers on each of the days between Monday August 19 and Wednesday September 4 2019. On each day samples were taken which included foot passengers and those travelling with motorcycles and other vehicles. Results were weighted by known passengers total travelling by these different modes on each day.

Departures by Air

Interviews were conducted on each of the days Monday August 19 and Wednesday September 4 2019, 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

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Isle of Man Steam Packet Company

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

Table 1: Number of visitors for FOM by mode of travel

	2009	2013	2015	2016	2017	2018	2019
Air	860	2,346	3,118	3,414	3,751	3,657	4,895
Sea	8,055	11,061	12,115	12,340	12,467	11,970	11,124
<i>Of which:</i>							
Foot	1,003	1,879	2,602	2,116	1,921	1,958	2,078
Motorcycle	2,818	3,562	3,990	4,345	4,446	4,485	4,190
Other vehicle	4,234	5,620	5,523	5,879	6,100	5,527	4,856
Total	8,915	13,407	15,233	15,754	16,218	15,627	16,019

Table 2: Nature of accommodation whilst in Isle of Man

	2009	2013	2015	2016	2017	2018	2019
Camping*	N/A	31.8	20.2	28.7	34.9	19.8	20.7
Hotel/Guest House	N/A	33.4	26.9	29.6	27.9	35.1	36.3
Homestay	N/A	6.9	12.6	11.6	11.5	13.1	11.7
With Friends/Relatives	N/A	16.7	23.9	15.1	15.4	13.1	14.8
Rented House/Flat etc.	N/A	8.5	9.3	11.3	8.3	12.6	13.3
Other**	N/A	2.6	7.0	3.8	2.0	6.4	3.3
Total	N/A	100	100	100	100	100	100

**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

	2009	2013	2015	2016	2017	2018	2019
Air	6.9	5.9	5.9	5.5	5.3	6.3	6.7
Sea	7.3	7.5	7.5	7.2	7.5	6.9	7.8
Total	7.3	7.2	7.2	6.8	7.0	6.8	7.4

Table 4: Visited for FOM before (%)

	2009	2013	2015	2016	2017	2018	2019
Visited previously	73.3	74.4	72.4	78.7	71.1	69.5	69.8
Every year	70.4	66.2	60.0	75.5	61.0		
Every couple of years	17.5	19.0	27.3	13.4	23.6		
Less frequently	12.0	14.7	12.7	11.2	15.4		
2 to 5 visits						54.4	50.1
6 to 10 visits						16.1	20.1
11 to 20 visits						12.4	13.0
20+ visits						17.1	16.8

Table 5: Visits for other motorsport events (%)*

	2009	2013	2015	2016	2017	2018	2019
Tend to visit for other events	N/A	64.1	61.7	66.3	71.3	64.5	62.9
TT	N/A	95.5	95.2	92.5	96.2	55.8	91.9
Southern 100	N/A	27.8	24.3	36.0	39.2	63.3	22.3
Pre-TT	N/A					19.0	18.4
Other	N/A					5.7	4.6

**The design of this question has been altered in order to more accurately estimate the relative impact of different events within the FOM. Results consequently are not exactly comparable across the series. Respondents can indicate multiple events and so the total does not sum to 100.*

Table 6: Country of residence (%)

	2009	2013	2015	2016	2017	2018	2019
England	79.4	80.1	73.1	73.3	71.1	73.5	69.0
Scotland	2.2	2.6	4.5	5.6	4.1	2.7	4.1
Wales	5.7	2.9	3.8	3.5	6.9	3.2	3.5
N. Ireland	3.0	2.9	7.1	3.1	4.7	2.8	2.9
S. Ireland	2.9	1.6	3.5	2.9	2.6	4.1	2.5
Other*	6.8	9.9	8.0	11.6	10.6	13.7	18.0
Total	100	100	100	100	100	100	100

*In 2019, "Other" included:

Channel Islands	Austria	Poland	Australia	South Africa
Germany	Switzerland	Portugal	Canada	Laos
France	Spain	Czech Republic	USA	Slovenia
Italy	Sweden	Latvia	Japan	
Netherlands	Norway	Belgium	New Zealand	

Table 7: Age profile (%)

	2016	2017	2018	2019
Under 18	3.3	4.3	5.3	5.5
18 to 29	6.6	4.4	6.5	5.9
30 to 49	33.8	29.4	23.1	21.3
50 to 64	48.1	50.4	47.6	45.3
65+	8.1	11.5	17.5	22.0
Total	100	100	100	100

Table 8(a): Average expenditure (£)

	2009	2013	2015	2016	2017	2018	2019
Travel to/from the Island	164	157	156	158	159	178	185
Accommodation	137	147	156	163	154	174	216
On-Island expenditure	250	320	268	308	299	272	316
Package cost						627	933
Total*	551	624	580	629	612	624	717

**Total for 2018-2019 does not include package costs. However it does include On-Island expenditure for those who visited on a package trip. Package trip refers only to one payment for both travel and accommodation.*

Table 8(b): Total expenditure (£m)

	2009	2013	2015	2016	2017	2018	2019
Travel to/from the Island	1.5	2.1	2.4	2.5	2.6	2.8	3.0
Accommodation	1.2	2	2.4	2.6	2.5	2.7	3.0
On-Island expenditure	2.2	4.3	4.1	4.9	4.8	4.2	5.1
Package cost						0.3	0.5
Total	4.9	8.4	8.9	9.9	9.9	10.0	11.4
Contribution to National Income	3.5	6	6.4	7.1	7.1	7.2	8.3
Exchequer Benefit	0.6	1.1	1.2	1.3	1.3	1.3	1.5

Notes on Table 8(b):

Contribution to national income is an estimate of the value-added economic benefit to the Island, derived from the expenditure of visitors.

The Exchequer benefit pertains to taxes resulting from the increase in national income, exclusive of port taxes and NI contributions.

Lastly, figures for total expenditure are in £millions, rounded to one decimal place; however, calculations have been based on raw figures, thus the sum of rounded figures in any column may not sum exactly to the total for that column.

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

	IOM Resident	FOM Visitors	Other Visitor	Total
Air Passenger	1,118	308	627	2,053
Sea - Foot Passenger	750	313	399	1,462
Sea - Motorcycle	8	481	21	510
Sea - Other Vehicle	828	774	381	1,983
Total	2,704	1,876	1,428	6,008

Sampling error

As with any sample survey, the results of this survey will be subject to random error variation.

The accuracy of a sample statistic is assessed in relation to the calculation of standard error, and use the standard error in turn to construct a 95% confidence interval for the survey findings. For the 2019 Festival of Motorsport study, we can estimate that the 95% confidence interval for the number of visitors for FOM in 2019 is +/- 46 from the estimated total of 16,019. That is, we can be 95% confident that, had all departing passengers been interviewed, the true number of visitors would have been found to be between 15,973 and 16,065.

Chart 1: Daily visitor departures by air, 2019

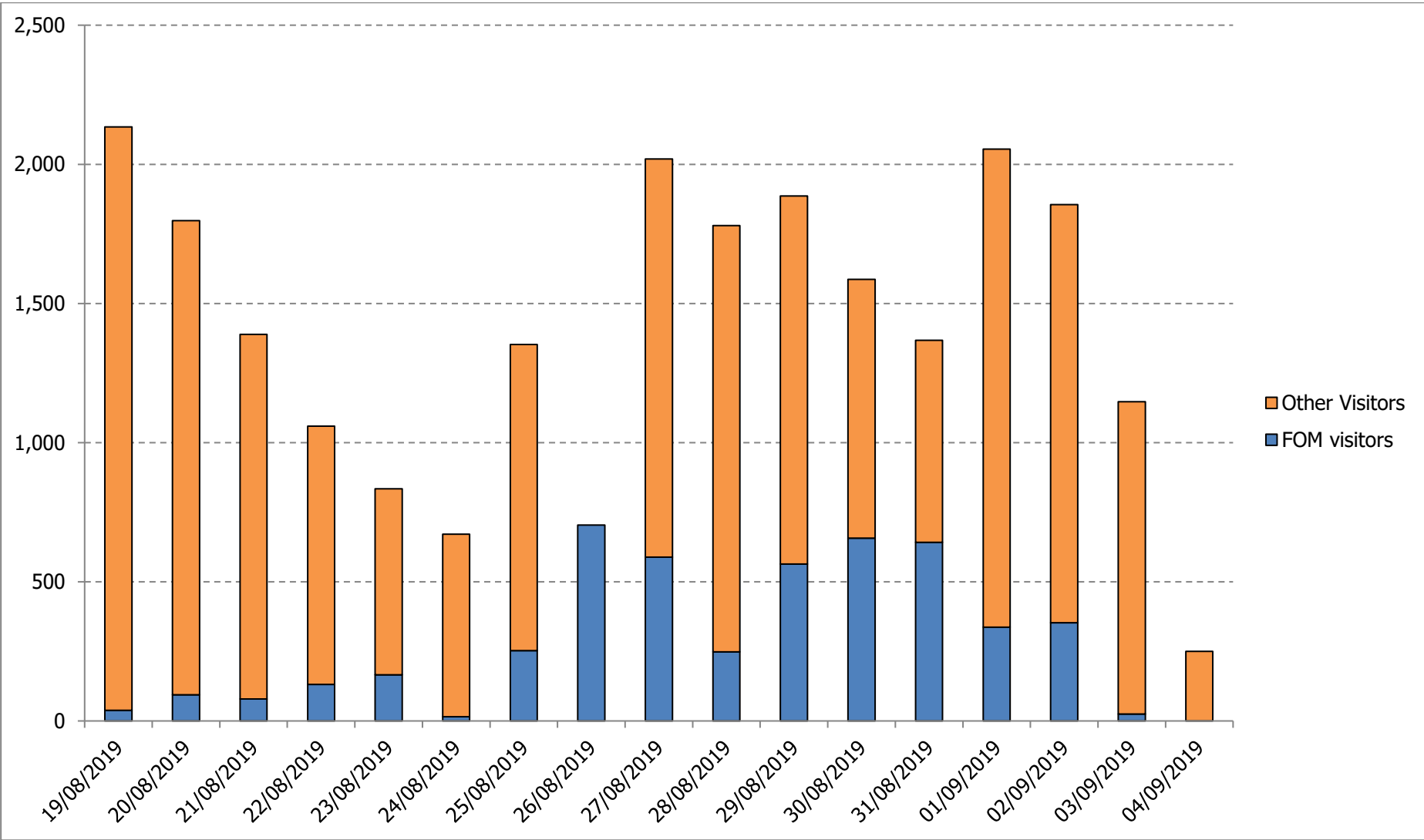
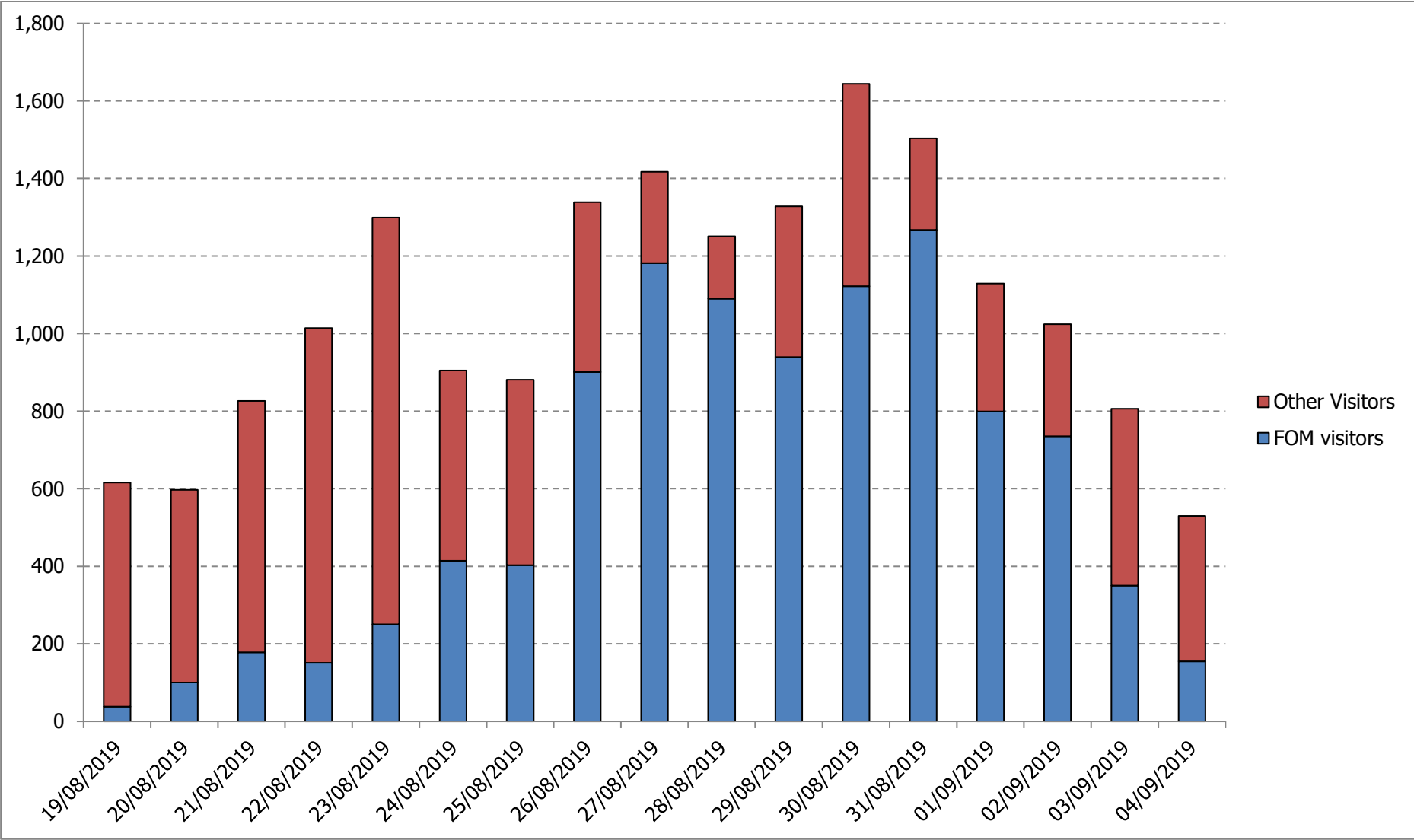


Chart 2: Daily visitor departures by sea, 2019





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