



**Isle of Man**  
**Government**

*Reillys Ellan Vannin*



# TT Survey 2013

Economic Affairs Division  
Isle of Man Treasury

## **TT SURVEY 2013**

### **Introduction**

This is the latest in a series of reports that are intended to help build up a picture of the nature and economic impact of motorsport in the Island. The research has been conducted by the Economic Affairs Division of Treasury and partly funded by the Tourism Division of the Department of Economic Development.

The research commenced in 2009 with a survey of visitors for the 2009 Manx Grand Prix, followed by similar research for the TT in 2010. The surveys concentrate 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, area of residence and pattern of visits.

This report contains the results of the survey for TT 2013 and comparisons with the results of the 2010 survey. Economic Affairs Division will also be covering the Festival of Motorcycling later this year and the results of that study should be published by late October.

### **Main Findings**

The main findings are that:

\*Almost 40,000 visitors came to the Island for the TT in 2013, up 27% on the comparable figure for 2010.

\*On average, they stayed 6.5 nights and spent £668 on the trip – a total of £26.2 million. This represents an economic benefit to the Island of £18.9 million and an exchequer benefit of £3.5 million (for an explanation of these terms and the cost to the Department of Economic Development of the TT please see the footnotes on page 5).

\*The number of visitors in the Island for TT on any one day reached a peak of just over 25,000 on Sunday 2<sup>nd</sup> June ("Mad Sunday").

\*73% had visited the Island previously for TT, and 24% tend to visit for other events such as the Southern 100 and MGP.

The results for each of the survey variables are given on pages 3 to 5. The chart on page 6 details the number of visitors in the Island for each day throughout the TT period and a comparison with the figures for 2010.

### **Sample Size**

A total of 6,160 interviews were conducted, of which 3,419 were with visitors to the Races. The response rate was 97.5%. Further details of the sample size and sampling error are given in Appendix 1.

## **Methodology**

The methodology used was the same as for the survey in 2010. Face to face interviews were conducted in the departure lounge and vehicle loading areas at the Sea Terminal and in the departure lounge at Ronaldsway Airport. A copy of the questionnaire used can be found in Appendix 2.

### *Departures by Sea*

Interviews were conducted with departing passengers on each of the days between the Monday of Practice Week (27<sup>th</sup> May) and the Wednesday following Senior Race Day (12<sup>th</sup> June). Separate samples were taken of foot passengers, of those travelling with motorcycles, and of those travelling in other vehicles. Results were weighted by known totals travelling by these different means.

### *Departures by Air*

Each of the days during the same two week period was divided into two hour time intervals and a sample taken from each. Results were weighted by known totals passing through the departure lounge during the periods the survey was being conducted.

## **Further Analysis**

Further analysis of the database produced by this study may be provided on request (see contact details below).

## **Acknowledgements**

We are very grateful to:

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September 2013

**Table 1. Number of visitors for TT by mode of travel**

	2010	2013	% Change
Air	7,781	11,702	50.4
Sea	23,006	27,522	19.6
<i>of which:</i>			
<i>Foot passenger</i>	4,743	7,859	65.7
<i>With motorcycle</i>	11,709	12,227	4.4
<i>With other type of vehicle</i>	6,554	7,436	13.5
<b>Total</b>	<b>30,787</b>	<b>39,224</b>	<b>27.4</b>

**Table 2. Nature of accommodation whilst in the Island**

	No.	%
Campsite (including Snoozebox)	12,056	30.7
Hotel / Guest House	8,684	22.1
Stayed with friends/relatives	7,651	19.5
TT Homestay	6,504	16.6
Rented Flat / Apartment	2,535	6.5
N/A - On a day trip	1,220	3.1
Other / Unidentified	574	1.5
<b>Total</b>	<b>39,224</b>	<b>100.0</b>

**Table 3. Average number of nights spent in the Island by mode of travel**

	2010	2013
Air	5.4	5.3
Sea	6.9	7.0
<b>All</b>	<b>6.5</b>	<b>6.5</b>

**Table 4. Particular events come for (%)**

Whole thing / Nothing particular	65.6
Racing	14.6
Practices	13.2
Pre-TT	2.7
Superbikes	2.7
Senior Race	2.2
Sidecars	1.6

**Table 5. Visited for TT before (%)**

	<b>2010</b>	<b>2013</b>
Have visited previously for TT	71.5	72.7
<i>of which, tend to visit:</i>		
<i>Every year</i>	63.7	64.8
<i>Every couple of years</i>	22.5	20.0
<i>Less frequently</i>	13.8	15.2

**Table 6. Visits for other events (%)**

	<b>2010</b>	<b>2013</b>
Tend to visit for other events	24.1	23.8
<i>of which, tend to visit for:</i>		
<i>Manx Grand Prix</i>	72.2	79.9
<i>Southern 100</i>	18.7	29.0

**Table 7. Area of residence**

	<b>2010</b>	<b>2013</b>
England	62.7	69.8
N.Ireland	9.2	5.0
Republic of Ireland	4.8	3.5
Scotland	4.0	3.5
Wales	3.1	3.3
Germany	2.2	2.1
Australia	2.0	2.3
Other	12.0	10.5
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

**Table 8. Average spend (£)**

	<b>2010</b>	<b>2013</b>
Travel to/from the Island	160	176
Accommodation	136	146
Expenditure whilst in the Island	324	346
<b>Total</b>	<b>620</b>	<b>668</b>

**Table 9. Total spend, contribution to National Income and Exchequer Benefit (£m)**

	2010	2013
Travel to/from the Island	4.9	6.9
Accommodation	4.2	5.7
Expenditure whilst in the Island	9.9	13.6
<b>Total expenditure</b>	<b>19.0</b>	<b>26.2</b>
<b>*Total Contribution to National Income</b>	<b>13.7</b>	<b>18.9</b>
<b>**Exchequer Benefit</b>	<b>2.6</b>	<b>3.5</b>

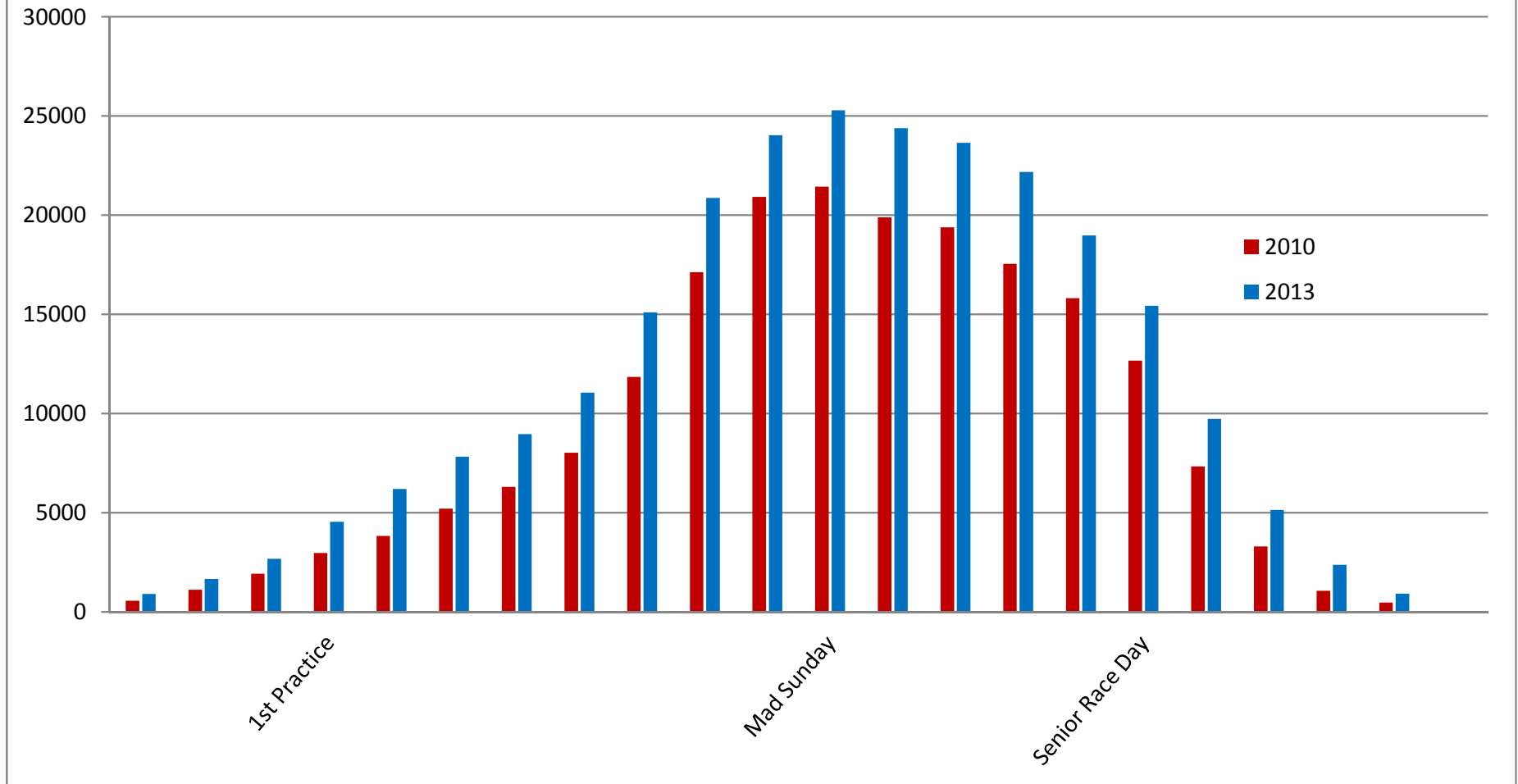
*Notes: \*The contribution to national income is the "value added" (a measure of the economic benefit) to the Island derived from the total expenditure of TT visitors. It includes the direct, indirect and induced benefit generated by the initial expenditure.*

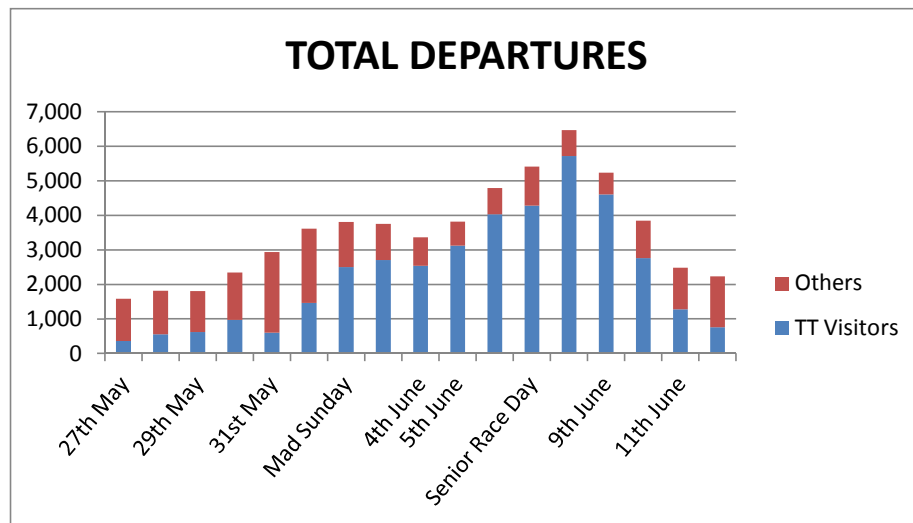
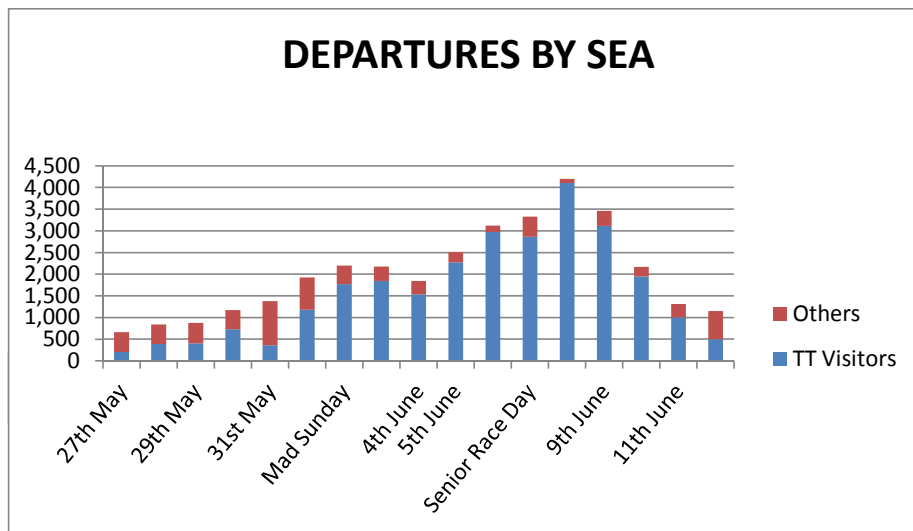
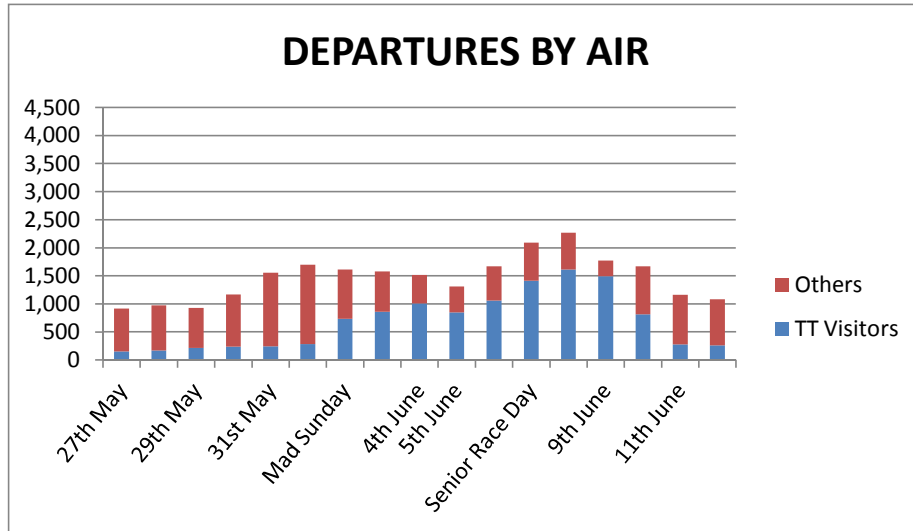
*\*\*All taxes resulting from the increase in national income, apart from port taxes and NI contributions.*

*The total cost of hosting the TT races is not known but, according to the Department of Economic Development:*

*"The net cost of the TT Races to the Government's Department of Economic Development, once commercial revenues and income have been offset against costs, is £2.6m. Costs include race administration, course set up costs, grandstand and paddock security, IT, communications, marshalling, medical cover including the air med service, marketing and administration, prize fund and appearance fees". Source: Department of Economic Development, September 2013.*

## Number of TT Visitors in the Island Each Day







## **APPENDIX 1. SAMPLE SIZE AND SAMPLING ERROR**

### **Sample size by type of passenger and mode of travel**

	IOM Resident	TT Visitor	Other Visitor	Total
Air	1,168	1,001	519	2,688
Sea - Foot Passenger	240	607	150	997
Sea - With Motorcycle	16	868	4	888
Sea - With other type of vehicle	528	939	120	1,587
Total	1,952	3,415	793	6,160

### **Technical Note**

As with any sample survey, the results will be subject to random error variation. However, with a sample size as large as 6,160, the error will be relatively small.

In order to assess the accuracy of a sample statistic, it is usual to work out the standard error and to use this to construct a 95% confidence interval around the estimate. For example, the estimated standard error of the result for TT visitors as a proportion of total passengers is 0.006 and this enables us to calculate that the 95% confidence interval for the number of TT visitors is (38,763 , 39,685).

Put simply, this means that 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 38,763 and 39,685.

The standard errors for the other estimates will vary and generally will be greater as they will be based on smaller sample sizes (maximum sample size for these = 3,415).

**APPENDIX 2. QUESTIONNAIRE**

**ISLE OF MAN TT SURVEY 2013**

Date..... Code..... Destination.....

Q1. How many are travelling together in your group? .....

Q2. (Sea passengers only) Are you travelling on foot or as the driver or passenger of a vehicle?

1-On foot 2-With motorcycle 3-On a coach 4-With other type of vehicle

Q3. Are you an Isle of Man Resident? 1-Yes 2-No (If "Yes", finish interview)

Q4. Is your trip connected with the TT? 1-Yes 2-No (If "No", finish interview)

Q5. Did you stay in: 1. Paid accommodation 2. With friends/relatives (If "2" go to Q7)

Q6. Was the accommodation: 1. Hotel 2. Guest House 3. Rented flat/apartment 4. Campsite

5. Snoozebox 6. Homestay 7. Other (Please specify.....)

Q7. Which TT events did you primarily come for? .....

Q8. Have you visited for the TT before? 1-Yes 2-No (If "No", go to Q10)

Q9. How often do you tend to visit for the TT?

1-Every Year 2-Every couple of years 3-Less often

Q10. Do you tend to visit the Island for any other motorsport events? 1-Yes 2-No (If "No", Q12)

Q11. Which events? 1-Festival of Motorsport (MGP) 2- Southern 100

3-Other (Please specify.....)

Q12. How many nights have you spent in the Island? .....

Q13. Where do you live? ..... (Country)

Q14. How much have you spent on:

(a) Travel to / from the Island (i) £..... (ii) Covers how many people.....

(b) Accommodation (i) £..... (ii) Covers how many people.....

(c) Other expenditure whilst here (i) £..... (ii) Covers how many people.....



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