



Isle of Man Passenger Survey 2023 Report (April to December)

February 2024

**Prepared by:
TSE Research
40 Chamberlayne Road
Eastleigh
Hampshire
SO50 5JH**

**TSE
RESEARCH**

Registered in England No. 01345038

**Registered office:
40 Chamberlayne Road
Eastleigh
Hampshire
Tel: +44 (0) 23 80625459**

VAT Registration No. GB 190 0026 08

TSE Research is a member of the Market Research Society Partner Scheme and our fieldwork is accredited by the Interviewer Quality Standards Scheme

Member Company Registered under the Data Protection Act - Registration No. Z8594703

Table of contents

1	KEY FINDINGS	- 4 -
2	INTRODUCTION	- 5 -
2.1	Background	- 5 -
2.2	Methodology	- 5 -
2.3	Sample size	- 5 -
2.4	Full year estimates	- 6 -
2.5	Acknowledgements	- 6 -
3	SURVEY RESULTS	- 7 -
	APPENDIX 1: Copy of questionnaire	- 15 -
	APPENDIX 2: Expenditure breakdown	- 21 -

1 KEY FINDINGS

The key results from the survey are:

- Of the 628,248 passengers departing the Island, 54.9% were residents and 45.1% were visitors to the Island.
- 57.7% of visitors to the Island had travelled for a holiday, 27.8% were visiting friends or family and 14.5% were on a business trip.
- 61.0% of residents leaving the Island were travelling for a holiday and 28.5% were visiting friends or family. 6.1% were travelling for business, 1.6% were leaving for a hospital appointment and 2.1% were leaving the Island.
- The average expenditure per visiting group was £1,223.60 and the total expenditure by those visitors is estimated to be £174.51 million.
- The average length of stay of all visitors was 5.40 nights and results in 1,532,217 bednights.
- 69.4% of visitors were staying in paid accommodation and 6.3% were on a package trip.
- 44.9% of visitors were staying in serviced accommodation, 30.8 were staying with friends or relatives, 11.0% in self-catering accommodation and 10.1% were camping.
- 87.1% of all visitors were from the British Islands and the Republic of Ireland.
- 98.9% of all visitors felt that their trip to the Isle of Man had met or exceeded their expectations.
- 32.6% of all visitors were in the 46 – 60 years olds age group. This was followed by 27.0% in the over 60 years age group and 19.5% of those who were 31 – 45 years old. 8.0% of all visitors were under the age of 16 years.
- 57.3% of all visitors also participated in an outdoor activity whilst on their visit and 37.5% had attended a motorsport event. 37.1% had visited family and/or friends, 25.9% of visitors had been on the Heritage Railways and 26.7% had visited a Manx National Heritage site.
- Only 4.3% of all visitors were registered disabled or had some form of sensory, physical or mental accessibility needs.

2 INTRODUCTION

2.1 Background

This report provides data from the Annual Isle of Man Passenger Survey 2023 covering the period 1st April to 31st December 2023. The purpose is to provide insight into the nature and economic impact of visitors to the Island. Previously conducted by the Department of Economic Affairs, the survey is now managed by the Tourism South East Research Department.

2.2 Methodology

Face-to-face interviews were conducted in the departure lounge and vehicle loading areas at the Sea Terminal and at Ronaldsway Airport outside the departure gate. Interviews were conducted across a selection of weekday, Saturday and Sundays over the period April to December¹. Results have been weighted on a monthly basis by known passengers departing the Island, with the apportioned number of residents interviewed removed from the figure to calculate overall results. Results have also been weighted by known totals of passengers travelling on each ferry route for each month. To date, route data has not yet been received for airlines and so weighting has only been applied to monthly totals. When the route data is received it is likely to have a minor impact on the results.

Only passengers recorded on scheduled departures were used in the analysis for this report, it does not include unscheduled departures such as charter flights, cruise ship passengers or pleasure craft.

Unless otherwise stated, the results refer to visitors to the Island. For the purpose of this report the data referred to as 2023 is for the period April to December. A separate report has been produced with estimates for the first quarter of 2023.

A copy of the questionnaire is attached in Appendix 1.

2.3 Sample size

In total, 9,124 passenger groups were interviewed during the nine-month period, which consisted of 4,810 groups of Isle of Man residents and 4,314 visitor groups to the Island. There was a 3% refusal rate.

¹ Due to interviewing not being conducted at Ronaldsway Airport until May 2023, the proportional difference between April and May air passenger numbers was applied to the May results to establish results for April 2023. This should be borne in mind when interpreting the results.

Table (i): Response rate (count)

	2023 Air	2023 Sea	2023 Total
Interviews	2,906	6,218	9,124
Refusals	123	160	283
Total approached	3,029	6,378	9,407

In total, surveys were conducted with 2,906 passenger groups being interviewed at Ronaldsway Airport and 6,218 passenger groups interviewed at either the Sea Terminal Vehicle Loading Area or in the Sea Terminal Departure Lounge.

2.4 Full year estimates

As interviewing did not commence until April 2023 it is only possible to estimate the total number of visitors for the whole year. This has been achieved by establishing the visitor proportions from the 2015 to 2018 survey data for January, February and March by mode of travel for each year. An average for each month and mode of travel has then been calculated. This has been weighted on a monthly basis by known passengers departing the Island by mode of travel.

Table (ii) below shows the estimated number of visitors and residents to the Island per quarter for the year.

Table (ii): Estimated number of residents and visitors by quarter (%)

	Quarter 1 (%)	Quarter 2 (%)	Quarter 3 (%)	Quarter 4 (%)	2023 Total (%)
Residents	(67.1) 66,370	(39.4) 78,754	(51.5) 115,407	(73.9) 150,758	(56.6) 411,289
Visitors	(32.9) 32,483	(60.6) 121,319	(48.5) 108,662	(26.1) 53,348	(43.4) 315,812
Total	(100) 98,853	(100) 200,073	(100) 224,069	(100) 204,106	(100) 727,101

2.5 Acknowledgements

We are grateful for the cooperation and assistance of:

Airports Division – Department of Infrastructure

Harbours Division – Department of Infrastructure

Isle of Man Steam Packet Company

Isle of Man Government – Cabinet Office

3 SURVEY RESULTS

Table 1: Mode of travel

	2023 Residents (%)	2023 Residents Count	2023 Visitors (%)	2023 Visitors Count
Air	58.6	202,221	46.4	131,544
Sea	41.4	142,698	53.6	151,785
Total	100	344,919	100	283,329
Of which, sea travelling by:				
Foot	21.3	30,403	25.1	38,062
With vehicle/motorbike	78.5	112,086	74.8	113,573
Coach	0.1	208	0.1	149

Table 2: Destination of ferry (%)

	2023 Residents	2023 Visitors
Belfast	1.6	3.5
Dublin	0.2	0.6
Heysham	62.3	57.7
Liverpool	35.6	37.9
Other	0.3	0.3

Table 3: Destination of flight (%)

	2023 Residents	2023 Visitors
Belfast City	4.4	5.9
Belfast International	1.6	1.8
Birmingham	7.1	10.4
Bristol	0.7	0.8
Dublin	2.1	7.5
Edinburgh	2.1	3.1
Gatwick	16.0	17.4
Jersey	0.5	0.3
Liverpool	21.8	18.2
London City	0.4	1.4
Luton	0.0	0.0
Manchester	19.6	14.3
Other	23.6	18.9

Table 4: Whether satisfied with the number of flights servicing the Isle of Man (%)

	2023 Residents	2023 Visitors
Yes	32.3	33.7
No	55.0	25.6
Unsure	12.7	40.7

Table 5: Level of satisfaction with the affordability of flights servicing the Isle of Man (%)

	2023 Residents	2023 Visitors
Mean score:	2.59	3.03
Very satisfied	1.3	16.3
Satisfied	67.1	74.4
Dissatisfied	21.5	5.4
Very dissatisfied	10.1	3.9

Table 6a: Reason for leaving the Island - residents (%)

	2023
Holiday	61.0
Visiting friends and/or family	28.5
Leaving Isle of Man	2.1
Business	6.8
Hospital visit	1.6

Table 6b: Reason for visiting the Island - visitors (%)

	2023
Holiday	57.7
Visiting friends and/or family	27.8
Leaving Isle of Man	0.0
Business	14.5
Hospital visit	0.0

Those travelling for business were asked to rate their level of satisfaction, on a score of 1 to 4, with doing business on the Island.

Table 7: Level of satisfaction with doing business on the Isle of Man (%)

	2023 Residents	2023 Visitors
Mean score	3.09	3.54
Very satisfied	22.7	55.9
Satisfied	66.2	42.2
Dissatisfied	8.1	1.9
Very dissatisfied	3.0	0.0

Table 8: Whether mainly stay in paid accommodation or with friends/relatives (%)

	2023 Total	2023 Air	2023 Sea
Paid accommodation	69.4	62.0	75.8
With friends/relatives	30.6	38.0	24.2

Table 9: Type of accommodation whilst on Isle of Man

	2023 Count	2023 %
Hotel/Guesthouse	109,860	38.8
B&B*	17,294	6.1
Self-catering	31,221	11.0
Hostel*	590	0.2
Camping (inc. paddock, motorhome, caravan)	28,508	10.1
Homestay	5,690	2.0
Second home*	2,935	1.0
Stayed with friend or relative	87,232	30.8
Total	283,329	100

* Included in other categories in previous surveys

Table 10: Type of accommodation and number of nights whilst on Isle of Man

	2023 (%)	2023 Total bednights	2023 Ave. number nights	2023 Survey Minimum	Survey Maximum
Hotel/Guesthouse	38.8	484,298	3.88	1	84
B&B*	6.1	94,989	4.75	1	29
Self-catering	11.0	226,182	6.53	1	72
Hostel*	0.2	1,875	2.27	2	7
Camping (inc. paddock, motorhome, caravan)	10.1	212,150	6.17	1	31
Homestay	2.0	55,593	7.53	6	18
Second home*	1.0	33,764	10.45	3	90
Stayed with friend or relative	30.8	423,907	6.50	1	90
Total	100	1,532,217	5.40		

Table 11: On a package trip (%)

	2023
Yes	6.3
No	93.7

Table 12: What did whilst on Island (%)

	2023
Motorsport - TT/MGP	28.9
Motorsport - Other	8.6
Cycling holiday	1.1
Sporting event (inc. walking, cycling, running, etc)	3.9
Golf holiday	0.9
Outdoor activity (inc. walking, rambling, glens, parks, landscapes)	57.3
Heritage Railways	25.9
MNH sites	26.7
Theatre/Concert	1.5
Personal event (wedding, etc)	2.7
Visit family/friends	37.1
Other	28.6

Table 13: Whether visit met expectations (%)

	2023
Exceeded expectations	51.5
Met expectations	47.4
Failed to meet expectations	1.1

Table 14: Mode of transport on Island (%)

	2023
On foot/walking	77.9
Bicycle	2.0
Motorbike/Scooter/Moped	6.2
Car/Van	58.4
Motorhome/Campervan	2.3
Public bus	27.8
Coach	0.7
Train	24.0
Boat	1.1
Taxi	22.4

Table 15: Level of agreement with statement: 'The Isle of Man is a destination which takes care of the environment' (%)

	2023
Mean score	4.48
Strongly agree	54.0
Agree	40.5
Neither/Nor	4.9
Disagree	0.5
Strongly disagree	0.1

Table 16: Level of agreement with statement: 'I was encouraged to behave in an environmentally responsible way' (%)

	2023
Mean score	4.25
Strongly agree	40.2
Agree	46.9
Neither/Nor	10.9
Disagree	1.7
Strongly disagree	0.3

In total, 91.3% of visitors provided a valid home postcode or country of residence. Tables 17 to 20 may not add up to 100% due to rounding differences.

Table 17: Country of residence – British Islands and Ireland (%)

	2023
England	68.9
Northern Ireland	4.9
Wales	3.9
Republic of Ireland	2.3
Scotland	5.9
Channel Islands	1.2
Total	87.1

Table 18: Region of residence – England (%)

	2023
East of England	3.6
East Midlands	5.8
London	1.5
North East	2.9
North West	27.7
South East	7.3
South West	3.7
West Midlands	8.1
Yorkshire and the Humber	8.3
Total	68.9

Table 19: Country of residence – Europe (%)

	2023
Austria	0.1
Belgium	0.3
Croatia	0.0
Cyprus	0.1
Czech Republic	0.1
Denmark	0.1
Europe (not specified)	0.0
France	1.5
Germany	1.3
Gibraltar	0.0
Greece	0.0
Hungary	0.1
Israel	0.0
Italy	0.3
Latvia	0.1
Lithuania	0.1
Luxembourg	0.0
Malta	0.5
Netherlands	0.5
Norway	0.1
Poland	0.1
Portugal	0.3
Slovakia	0.0
Slovenia	0.0
Spain	0.4
Sweden	0.2
Switzerland	0.4
Total	6.5

Table 20: Country of residence – Rest of the world (%)

	2023
Argentina	0.0
Australia	1.4
Bermuda	0.0
Brazil	0.1
Canada	0.5
Caribbean (not specified)	0.0
China	0.1
Egypt	0.0
Georgia	0.1
Hong Kong	0.1
India	0.2
Japan	0.1
Kuwait	0.0
Mexico	0.1
Mongolia	0.0
New Zealand	0.6
Peru	0.1
Philippines	0.2
South Africa	0.7
South Korea	0.1
Taiwan	0.0
Ukraine	0.1
U.A.E.	0.2
U.S.A.	2.9
Total	7.6

Table 21: Age profile

	2023 Count	2023 %	2023 Average group size
Under 16 years	22,571	8.0	1.60
16 – 30 years	36,993	13.1	1.60
31 – 45 years	55,160	19.5	1.39
46 – 60 years	92,244	32.6	1.62
Over 60 years	76,362	27.0	1.64
Total	283,329	100	1.98

Table 22: Registered disabled or have any sensory, physical or mental accessibility needs (%)

	2023
Yes	4.3
No	94.2
Prefer not to say	1.5

Table 23: Main onward destination after arrival at airport/ferry port (%)

	2023
England – North East	6.5
England – North West	26.5
England – Yorkshire and the Humber	6.2
England – The Midlands	10.6
England – East Anglia	1.5
England – South East	9.6
England – South West	4.5
Scotland	5.3
Northern Ireland	3.5
Southern Ireland	2.6
Wales	3.1
Channel Islands	0.7
Overseas	19.3

Average expenditure has been calculated with regard to only those groups which incurred that type of expenditure, or confirmed that they had spent nothing on certain aspects (e.g. those staying with friends and/or relatives that incur no cost). Therefore, the base for each aspect of expenditure may have a different base due to the varying number who did not recall what they had spent.

Table 23: Average expenditure per visitor (£)

	2023
Non-package trip expenditure	
Travel to/from Island	167.78
Accommodation	167.78
Whilst on Island	256.58
<i>Total non-package</i>	<i>592.14</i>
<i>Weighted non-package</i>	<i>554.84</i>
Package trip expenditure	
Package	734.15
Whilst on Island	263.34
<i>Total package</i>	<i>997.49</i>
<i>Weighted package</i>	<i>62.84</i>
Total	617.68

Table 25 Total expenditure (£ millions)

	2023
Non-package trip expenditure	
Travel to/from Island	44.42
Accommodation	44.55
Whilst on Island	67.79
<i>Total non-package</i>	<i>156.76</i>
Package trip expenditure	
Package	13.05
Whilst on Island	4.70
<i>Total package</i>	<i>17.75</i>
Total	174.51

APPENDIX 1: Copy of questionnaire



Isle of Man Passenger Survey 2023

Location:

- Ronaldsway Airport
- Sea Terminal Vehicle Loading Area
- Sea Terminal Departure Lounge

Do you live on the Isle of Man?

- Yes
- No

What is your destination from the Isle of Man?

- Belfast City
- Belfast International
- Birmingham
- Bristol
- Dublin
- Edinburgh
- Gatwick
- Jersey
- Liverpool
- London City
- Luton
- Manchester
- Other

What is your destination from the Isle of Man?

- Belfast
- Dublin
- Heysham
- Liverpool
- Other

How are you travelling?

- Foot passenger
- Vehicle/Motorbike
- Coach

What is/was the reason for travelling? (select all that apply)

- Holiday
- Visiting friends and/or family
- Leaving Isle of Man
- Business
- Hospital visit

Why are you leaving the Isle of Man?

- New job off Island
- No work available on the Island
- Move closer to family/friends
- Cost of living
- Other

How many nights stay did this trip include?

Did you mainly stay in paid accommodation (including Homestay) or with friends/relatives?

- In paid accommodation
- With friends/relatives

What type of accommodation did you stay in?

- Hotel/Guesthouse
- B&B
- Self catering
- Hostel
- Camping (inc. paddock, motorhome, caravan)
- Homestay (TT/MGP only)
- Second home
- Stayed with friend or relative

Are you on a package trip?

- Yes
 No

How much did your package cost?

What was the cost of your accommodation?

What was the cost of your travel to and from the Island (*between IOM and UK/Eire only*)

How much have you spent in total whilst on the Island (*excluding accommodation*)

And, how much of this was spent on:

Food - Dining in restaurants, cafes and pubs

Food - Food from shops

Alcohol - In restaurants or pubs

Alcohol - Private consumption

Tobacco - All tobacco and vape products

Clothing - Adults clothing and footwear

Clothing - Children's clothing and footwear

Transportation - Petrol/Diesel

Transportation - Car hire

Transportation - Taxis

Transportation - Bus/Coach single fares

Transportation - Weekly pass/Multipass

Train fares

Entertainment and recreation - Manx National Heritage card

Entertainment and recreation - Admissions to heritage attractions

Entertainment and recreation - Admissions to sporting events

Entertainment and recreation - Admissions to cinema, theatre or casino

Entertainment and recreation - Equipment hire for sport or outdoor recreation

Entertainment and recreation - Leisure or recreation class fees

Entertainment and recreation - Souvenirs (non-clothing)

17. How many people does this cover?

What have you done during your visit to the Island?

- Motorsport - TT/MGP
- Motorsport - Other
- Cycling holiday
- Sporting event (inc. walking, cycling, running, etc)
- Golf holiday
- Outdoor activity (inc. walking, rambling, glens, parks, landscapes)
- Heritage Railways
- MNH sites
- Theatre/Concert
- Personal event (wedding, etc)
- Visit family/friends
- Other

What types of transport have you used to travel around the Island?

- On foot/Walking
- Bicycle
- Motorbike/Scooter/Moped
- Car/Van
- Motorhome/Campervan
- Public bus
- Coach
- Train
- Boat
- Taxi

Are you satisfied that there are a sufficient number of flights servicing the Isle of Man?

- Yes
- No
- I don't know

Are you satisfied that the flights servicing the Isle of Man are affordable?

- | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|
| Very satisfied | Satisfied | Dissatisfied | Very dissatisfied |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Overall, how satisfied are you with doing business on the Isle of Man?

- | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|
| Very satisfied | Satisfied | Dissatisfied | Very dissatisfied |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

How much do you agree with the following statements?

- | | Strongly agree | Agree | Neither/Nor | Disagree | Strongly disagree |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| The Isle of Man is a destination which takes care of its natural environment. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I was encouraged to behave in an environmentally responsible way | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Did your visit to the Isle of Man meet your expectations?

- Exceeded expectations
- Met expectations
- Failed to meet expectations

How many people in your travelling group are in the following age ranges?

0 - 15 years	<input type="text"/>
16 - 30 years	<input type="text"/>
31 - 45 years	<input type="text"/>
46 - 60 years	<input type="text"/>
Over 60 years	<input type="text"/>

Are you registered disabled or have any sensory, physical or mental accessibility needs?

- Yes
- No
- Prefer not to say

What is your main destination?

- England - North East
- England - North West
- England - Yorkshire/Humberside
- England - The Midlands
- England - East Anglia
- England - South East
- England - South West
- Scotland
- Northern Ireland
- Southern Ireland
- Wales
- Channel Islands
- Overseas

Could you please tell me your home postcode? *(if overseas, write name of the country)*

APPENDIX 2: Expenditure breakdown

Additional expenditure questions were included in the survey for Statistics IOM, the responses for which are detailed in the table below. It should be noted that not all visitors were able to provide detailed expenditure breakdowns and so some values are based on small samples.

Table a: Total expenditure on food (£ millions)

Food	2023
Dining in restaurants, cafes and pubs	29.73
Food from shops	4.84
Total	34.57

Table b: Total expenditure on alcohol (£ millions)

Alcohol	2023
In restaurants or pubs	6.47
Private consumption	0.88
Total	7.35

Table c: Total expenditure on tobacco (£ millions)

Tobacco	2023
All tobacco and vape products	0.25
Total	0.25

Table d: Total expenditure on clothing (£ millions)

Clothing	2023
Adults clothing and footwear	3.06
Children's clothing and footwear	0.25
Total	3.31

Table e: Total expenditure on transportation and train fares (£ millions)

Transportation	2023
Petrol/Diesel	2.00
Car hire	1.38
Taxis	1.17
Bus/Coach single fares	0.50
Weekly pass/Multipass	0.97
Train fares	0.61
Total	6.63

Table e: Total expenditure on entertainment (£ millions)

Entertainment and recreation	2023
Manx National Heritage card	0.30
Admissions to heritage attractions	0.53
Admissions to sporting events	0.47
Admissions to cinema, theatre or casino	0.20
Equipment hire for sport or outdoor recreation	0.09
Leisure or recreation class fees	0.07
Souvenirs (non clothing)	1.39
Total	3.05

Table e: Total expenditure (£ millions)

	2023
Food	34.57
Alcohol	7.35
Tobacco	0.25
Clothing	3.31
Transportation	6.63
Entertainment and recreation	3.05
Total	55.16