



# Isle of Man TT Visitor Survey 2025



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## 1 KEY FINDINGS

The key results from the survey are:

- Known passengers departing the Island during the interview period (with apportioned number of residents interviewed removed) were weighted by the number of interviews to estimate the overall number of visitors during that period. This was estimated to be 51,649 visitors (however, this is not the true number of visitors to the TT, but the estimated number of visitors during the interview period).
- The average expenditure per visitor was £1,015 and the total expenditure by those visitors is estimated to be £51.9 million.
- The average length of stay of all visitors was 6.54 nights and results in 336,891 bednights.
- 85.1% of visitors to the TT were staying in paid accommodation and 4.0% were on a package trip.
- 42.7% of visitors were camping, 23.9% were staying in a hotel/guesthouse/B&B and 10.1% were staying in Homestay accommodation.
- 74.4% of all visitors were from the British Islands and Ireland, 11.8% from Europe and 13.7% from the rest of the world.
- 98.0% of all visitors felt that their trip to the Isle of Man had met or exceeded their expectations.
- 46 - 60 years olds were the largest visiting age group comprising of 36.5% of all visitors. This was followed by 23.7% of those who were 31 – 45 years old. 23.2% of visitors were aged over 60 years old and 4.8% of all visitors were under the age of 16 years.

- 71.9% of all visitors also participated in an outdoor activity whilst on their visit. 20.4% of visitors had been on the Heritage Railways, 12.0% had visited family and/or friends and 2.5% had visited a Manx National Heritage site
- Only 5.4% 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 2025 covering the period 27<sup>th</sup> May to 12<sup>th</sup> June 2025 – covering visitors leaving up to during and after the end of the TT, who had responded to the question regarding ‘What they had done on their visit to the Island?’ – *Motorsport TT/MGP*. This period is directly comparable with the same interview periods from previous surveys. The purpose is to provide insight into the nature and economic impact of the TT Racing Event for the Motorsport Division of the Department for Enterprise. In previous years there has been a standalone survey for the period of the TT, and so this needs to be borne in mind as the results will not be directly comparable with previous surveys. It should also be noted that some questions that were asked in the standalone survey were not asked in the Isle of Man Passenger Survey.

### **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 to cover the period from 27<sup>th</sup> May to 12<sup>th</sup> June 2025. Results have been weighted by known passengers departing the Island within that period, with the apportioned number of residents interviewed removed from the figure to calculate overall 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.

A copy of the questionnaire is attached in Appendix 1.

### **2.3 Sample size**

In total, 1,184 passenger groups were interviewed during the period, which consisted of 398 groups of residents of the Isle of Man and 786 visitor groups to the Island. Of the visitor groups interviewed, 92.6% (727 groups) were visiting for the TT.

Of the passenger groups that were visiting for the TT, 261 passenger groups were interviewed at Ronaldsway Airport and 466 passenger groups interviewed at either the Sea Terminal Vehicle Loading Area or in the Sea Terminal Departure Lounge.

The results in this report are based only on those visitor groups interviewed that were visiting for the TT.

### **2.4 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

It should be noted that all results in the following tables are based on those people interviewed during the survey period who in response to the question regarding 'What they had done on their visit to the Island?' answered – *Motorsport TT/MGP*, therefore this may not fully reflect the total number of people attending the TT.

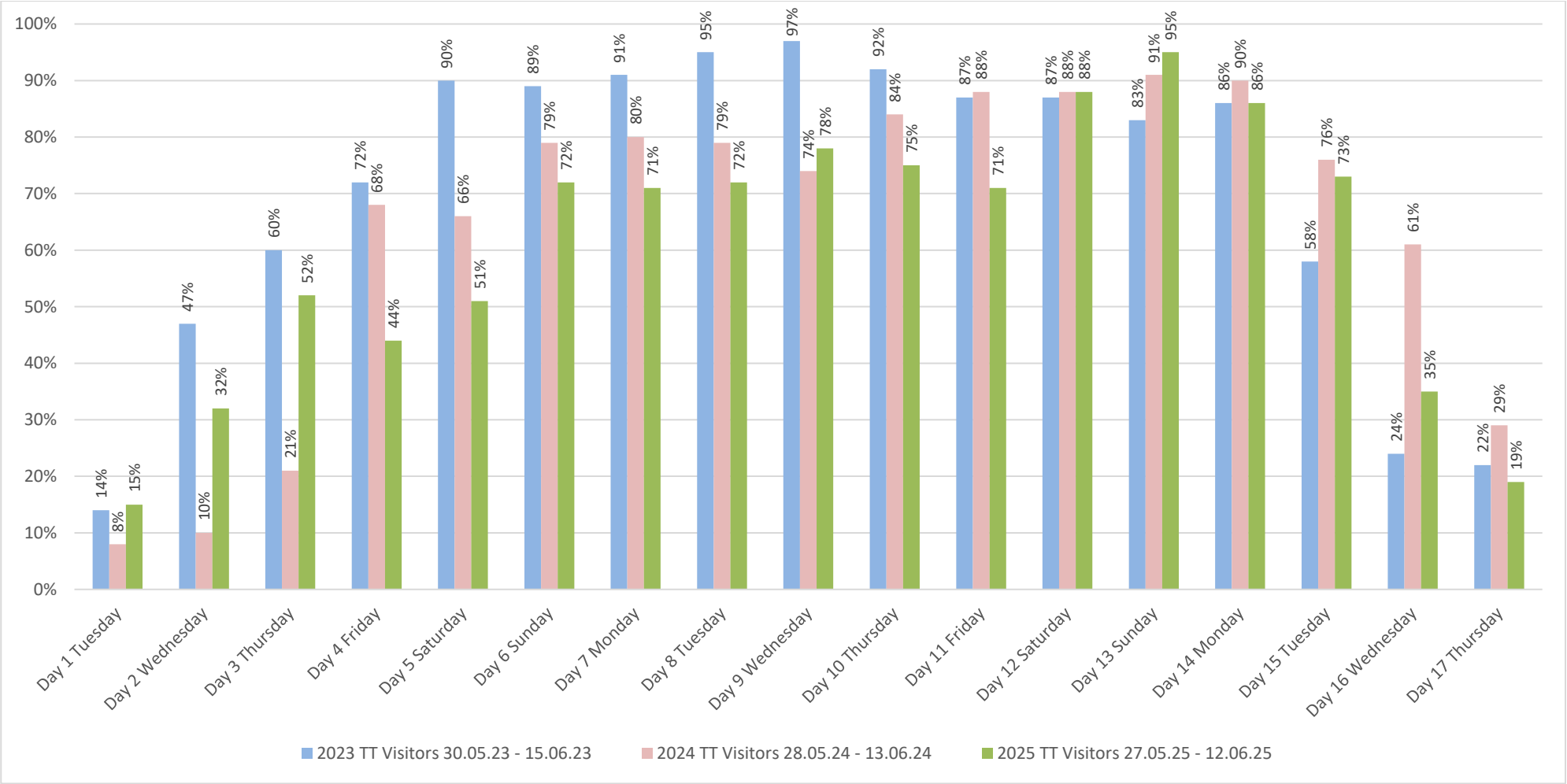
**Table 1: Mode of travel**

	2025	2024	2023		2022	2019	2018	2017	2015	2013	2010
Air	14,076	14,323	17,004	Air	10,137	14,747	14,451	14,662	12,560	11,702	7,781
Sea	37,573	32,782	24,526	Sea	30,632	31,427	29,926	30,392	29,571	27,522	23,006
On foot	7,902	7,481	4,807	Foot	8,382	7,617	7,759	6,553	7,640	7,859	4,743
With vehicle/motorbike	29,671	25,301	19,719	With motorcycle	13,970	14,591	14,531	15,362	14,720	12,227	11,709
Coach	0	0	0	With other type of vehicle	8,280	9,219	7,636	8,477	7,211	7,436	6,554
<b>Total</b>	<b>51,649</b>	<b>47,105</b>	<b>41,530</b>		<b>40,769</b>	<b>46,174</b>	<b>44,377</b>	<b>45,054</b>	<b>42,131</b>	<b>39,224</b>	<b>30,787</b>

**Table 2: On a package trip (%)**

	2025 Survey	2024 Survey	2023 Survey
Yes	4.0	8.1	7.6
No	96.0	91.9	92.4

Figure 1: Distribution of interviews of TT visitors during interview period – year on year comparison



**Table 3: Type of accommodation whilst on Isle of Man**

	<b>2025 Count</b>	<b>2025 %</b>	<b>2024 %</b>	<b>2023 %</b>	<b>2022 %</b>	<b>2019 %</b>	<b>2018 %</b>
Hotel/Guesthouse	9,659	18.7	14.9	19.3	21	19	19
B&B*	2,692	5.2	5.4	5.1	-	-	-
Self catering	4,146	8.0	9.3	8.2	7	9	8
Hostel*	139	0.3	0.2	0.3	-	-	-
Camping (inc. paddock, motorhome, caravan)	22,072	42.7	40.9	35.5	34	38	36
Homestay	5,229	10.1	10.1	9.0	17	18	19
Second home*	56	0.1	0.2	0.7	-	-	-
Stayed with friend or relative	7,656	14.8	19.0	21.8	15	14	14
Other**	-	-	-	-	5	2	4
<b>Total</b>	<b>51,649</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

\* Included in other categories in previous surveys

\*\* Not asked from 2023 onwards

**Table 4: Average number of nights spent on Island by mode of travel**

	<b>2025</b>	<b>2024</b>	<b>2023</b>	<b>2022</b>	<b>2019</b>	<b>2018</b>	<b>2017</b>	<b>2016</b>	<b>2015</b>	<b>2013</b>	<b>2010</b>
Air	5.09	5.89	5.25	7.7	5.7	5.4	5.7	5.7	6.0	5.3	5.4
Sea	7.18	7.46	6.56	6.4	7.3	7.3	6.8	7.1	7.4	7.0	6.9
<b>Total</b>	<b>6.54</b>	<b>6.71</b>	<b>6.07</b>	<b>7.4</b>	<b>6.8</b>	<b>6.7</b>	<b>6.5</b>	<b>6.6</b>	<b>7.0</b>	<b>6.5</b>	<b>6.5</b>

**Table 5: Type of accommodation and number of nights whilst on Isle of Man**

	2025 Survey %	2025 Survey Total bednights	2024 Survey Total bednights	2025 Survey Ave. number nights	2024 Survey Ave. number nights	2025 Survey Minimum	2025 Survey Maximum
Hotel/Guesthouse	18.7	44,528	41,172	4.48	5.85	1	17
B&B*	5.2	15,048	14,317	5.59	5.65	1	19
Self-catering	8.0	28,483	32,776	6.78	7.49	2	18
Hostel*	0.3	487	510	3.20	6.00	2	5
Camping (inc. paddock, motorhome, caravan)	42.7	149,655	126,372	6.77	6.56	1	21
Homestay	10.1	43,976	38,247	8.56	8.02	1	23
Second home*	0.1	280	1,020	5.80	12.00	5	6
Stayed with friend or relative	14.8	54,434	60,708	7.14	6.78	1	60
<b>Total</b>	<b>100</b>	<b>336,891</b>	<b>315,123</b>	<b>6.52</b>	<b>6.71</b>	<b>1</b>	<b>60</b>

**Table 6: Whether visit met expectations (%)**

	2025 Survey	2024 Survey	2023 Survey
Exceeded expectations	36.8	42.7	65.2
Met expectations	61.2	54.1	34.0
Failed to meet expectations	2.0	3.2	0.7

**Table 7: What else did whilst on the Island**

	2025 Survey Count	2025 Survey %	2024 Survey %	2023 Survey %
Cycling holiday	162	0.3	0.6	0.7
Sporting event (inc. walking, cycling, running, etc)	79	0.2	0.8	1.0
Golf holiday	0	0.0	0.0	0.0
Outdoor activity (inc. walking, rambling, glens, parks, landscapes)	37,139	71.9	66.0	85.3
Heritage Railways	10,552	20.4	19.0	23.5
MNH sites	11,096	2.5	26.1	33.1
Theatre/Concert	646	1.3	0.0	0.0
Personal event (wedding, etc)	294	0.6	1.5	1.7
Visit family/friends	6,219	12.0	24.7	30.5
Other	2,235	4.3	2.4	4.7

**Table 8: Country of residence – British Islands and Ireland (%)**

	2025	2024	2023	2022	2019	2018	2017	2016	2015	2013	2010
England	60.8	58.5	66.3	60.1	57.8	64.1	67.1	68.6	63.5	69.8	62.7
Northern Ireland	4.8	2.7	1.1	7.7	5.6	5.0	7.1	7.7	6.9	5.0	9.2
Wales	4.2	5.0	5.1	4.4	3.8	3.7	4.9	4.9	3.9	3.3	3.1
Republic of Ireland	1.7	1.1	2.0	6.2	3.6	2.6	2.3	2.9	4.0	3.5	4.8
Scotland	2.5	3.2	4.4	5.3	3.0	2.8	4.4	2.4	4.3	3.5	4.0
Channel Islands	0.4	1.6	0.1	0.0	0.2	0.3	0.1	0.1	0.0	0.0	0.0
<b>Total</b>	<b>74.4</b>	<b>72.1</b>	<b>79.0</b>	<b>83.7</b>	<b>74.0</b>	<b>78.5</b>	<b>85.9</b>	<b>86.6</b>	<b>82.6</b>	<b>85.1</b>	<b>83.8</b>

*\*Percentage 0.0 refers to small but non-zero numbers of visitors in these categories*

**Table 9: Country of residence – Europe (%)**

	2025	2024	2023
Germany	2.6	2.3	2.1
France	2.3	1.6	2.1
Netherlands	1.7	1.2	1.1
Italy	1.0	0.7	0.3
Spain	0.9	1.6	0.7
Switzerland	0.6	0.5	0.6
Belgium	0.6	0.2	0.4
Portugal	0.4	-	0.1
Norway	0.3	-	0.3
Sweden	0.3	1.8	0.7
Latvia	0.1	0.4	-
Poland	0.1	0.2	0.1
Austria	0.1	-	0.7
Finland	0.1	1.8	-
Croatia	0.1	-	0.1
Slovenia	0.1	-	0.3
Czech Republic	0.1	-	-
Madeira	0.1	-	-
Malta	-	0.2	0.1
Denmark	-	0.4	0.3
Hungary	-	-	0.3
Europe (not specified)	-	-	0.3
<b>Total</b>	<b>11.8</b>	<b>12.8</b>	<b>10.7</b>

**Table 10: Country of residence – Rest of the world (%)**

	2025	2024	2023
U.S.A.	6.4	8.4	4.6
Australia	3.8	2.3	3.5
Canada	1.4	1.4	-
New Zealand	0.6	1.2	1.5
China	0.4	-	-
U.A.E	0.3	0.4	0.1
South Africa	0.3	0.2	0.1
Caribbean	0.1	-	-
Japan	0.1	0.5	-
Costa Rica	0.1	-	-
Columbia	0.1	-	-
Argentina	-	0.2	-
Brazil	-	0.2	-
Taiwan	-	0.2	-
Malaysia	-	0.2	-
Mexico	-	-	0.1
Mongolia	-	-	0.1
<b>Total</b>	<b>13.7</b>	<b>15.1</b>	<b>10.3</b>

**Table 11: Age profile**

	<b>2025 Count</b>	<b>2025 %</b>	<b>2024 %</b>	<b>2023 %</b>	<b>2022 %</b>	<b>2019 %</b>
Under 16 years	2,489	4.8	5.1	4.3	5.2	3.4
16 – 30 years	6,090	11.8	13.0	14.8	14.6	11.3
31 – 45 years	12,222	23.7	25.0	22.6	41.7	38.4
46 – 60 years	18,851	36.5	35.6	36.1	33.5	35.6
Over 60 years	11,997	23.2	21.5	22.1	5.0	11.2
<b>Total</b>	<b>51,649</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

**Table 12: Registered disabled or have any sensory, physical or mental accessibility needs (%)**

	<b>2025 Survey</b>	<b>2024 Survey</b>	<b>2023 Survey</b>
Yes	5.4	3.0	4.1
No	94.6	96.7	95.9
Prefer not to say	0.0	0.2	0.0

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 13: Average expenditure per visitor (£)**

	2025	2024	2023	2019	2018	2017	2016	2015	2013	2010
<b>Non-package trip expenditure</b>										
Travel to/from Island	243	245	210	236	221	191	188	210	176	160
Accommodation	304	285	204	198	183	157	151	175	146	136
Whilst on Island	431	418	371	365	421	409	399	321	346	324
<i>Total non-package</i>	<i>978</i>	<i>948</i>	<i>785</i>	<i>799</i>	<i>825</i>					
<i>Weighted non-package</i>	<b>939</b>	<b>875</b>	<b>721</b>							
<b>Package trip expenditure</b>										
Package*	1,408	1,521	907			-	-		-	-
Whilst on Island	510	393	316							
<i>Total package</i>	<i>1,918</i>	<i>1,914</i>	<i>1,223</i>	<i>1,270</i>	<i>1,218</i>					
<i>Weighted package</i>	<i>76</i>	<i>147</i>	<i>100</i>							
<b>Total weighted</b>	<b>1,015</b>	<b>1,022</b>	<b>821</b>	<b>801</b>	<b>886</b>	<b>757</b>	<b>738</b>	<b>706</b>	<b>668</b>	<b>620</b>

\* Package trips include both travel and accommodation as one purchase. Prior to 2018, this spending was apportioned across Travel and Accommodation spending.



**Table 14: Total expenditure (£ millions)**

	2025	2024	2023	2019	2018	2017	2016	2015	2013	2010
<b>Non-package trip expenditure</b>										
Travel to/from Island	12.2	10.9	8.1	9.8	9.0	8.6	8.0	8.8	6.9	4.9
Accommodation	14.2	11.7	7.6	7.8	7.2	7.1	6.4	7.4	5.37	4.2
Whilst on Island	21.5	17.4	14.3	16.8	18.7	18.4	16.9	13.5	13.6	9.9
<i>Total non-package</i>	<i>47.9</i>	<i>40.0</i>	<i>30.0</i>							
<b>Package trip expenditure</b>										
Package*	2.9	5.3	3.1	3.1	2.2	-	-			
Whilst on Island	1.1	1.4	1.1							
<i>Total non-package</i>	<i>4.0</i>	<i>6.7</i>	<i>4.2</i>							
<b>Total</b>	<b>51.9</b>	<b>46.7</b>	<b>34.2</b>	<b>37.5</b>	<b>37.1</b>	<b>34.1</b>	<b>31.3</b>	<b>29.7</b>	<b>26.2</b>	<b>19</b>
<b>Contribution to National Income**</b>	<b>37.4</b>	<b>33.7</b>	<b>24.7</b>	<b>27.1</b>	<b>26.8</b>	<b>24.6</b>	<b>22.5</b>	<b>21.4</b>	<b>18.9</b>	<b>13.7</b>
<b>Exchequer benefit^</b>	<b>6.7</b>	<b>6.0</b>	<b>4.4</b>	<b>4.8</b>	<b>4.8</b>	<b>4.4</b>	<b>4.1</b>	<b>3.9</b>	<b>3.5</b>	<b>2.6</b>

\* Package trips include both travel and accommodation as one purchase. Prior to 2018, this spending was apportioned across Travel and Accommodation spending.

\*\* 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).

## APPENDIX 1: Copy of questionnaire

Isle of Man Passenger Survey 2025

1. Location:
- ☐ Ronaldsway Airport
  - ☐ Sea Terminal Vehicle Loading Area
  - ☐ Sea Terminal Departure Lounge
2. Do you live on the Isle of Man?
- ☐ Yes
  - ☐ No
3. 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
4. What is your destination from the Isle of Man?
- ☐ Belfast
  - ☐ Dublin
  - ☐ Heysham
  - ☐ Liverpool
  - ☐ Other
5. How are you travelling?
- ☐ Foot passenger
  - ☐ Vehicle/Motorbike
  - ☐ Coach

6. What is/was the reason for travelling? (select all that apply)
- ☐ Holiday
  - ☐ Visiting friends and/or family
  - ☐ Leaving Isle of Man
  - ☐ Business
  - ☐ Hospital visit
7. 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
8. How many nights stay did this trip include?
- 
9. Did you mainly stay in paid accommodation (including Homestay) or with friends/relatives?
- ☐ In paid accommodation
  - ☐ With friends/relatives
  - ☐ Day tripper
10. 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
11. Are you on a package trip?
- ☐ Yes
  - ☐ No
12. How much did your package cost?
-

13. What was the cost of your accommodation?

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

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

16. 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?

18. What was the **MAIN** activity that you participated in during your visit to the Island?

(please select one answer only)

- ☐ 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

19. What were the **OTHER** activities that you participated in during your visit to the

Island? (please select as many answers as applicable)

- ☐ 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

20. Please specify what other activity that you have participated in:

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

- ☐ On foot/Walking
- ☐ Bicycle
- ☐ Motorbike/Scooter/Moped (own)
- ☐ Motorbike/Scooter/Moped (rented)
- ☐ Car/Van (own)
- ☐ Car/van (rented)
- ☐ Motorhome/Campervan (own)
- ☐ Motorhome/Campervan (rented)
- ☐ Public bus
- ☐ Coach
- ☐ Train
- ☐ Boat
- ☐ Taxi
- ☐ Transport provided by family/friend

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

- ☐ Yes
- ☐ No
- ☐ I don't know

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

Very satisfied	Satisfied	Dissatisfied	Very dissatisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Very satisfied	Satisfied	Dissatisfied	Very dissatisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

25. 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="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was encouraged to behave in an environmentally responsible way	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. Was there anything in particular that you noticed?

27. What improvements could be made?

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

- ☐ Exceeded expectations  
☐ Met expectations  
☐ Failed to meet expectations

29. Was there anything in particular that exceeded your expectations?

30. Was there something specific that prompted this feeling?

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

0 - 15 years

16 - 30 years

31 - 45 years

46 - 60 years

Over 60 years

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

- ☐ Yes  
☐ No  
☐ Prefer not to say

33. 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

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

35. Do you have any additional comments about your visit to the Isle of Man?

36. Do you have any additional comments about your journey today?