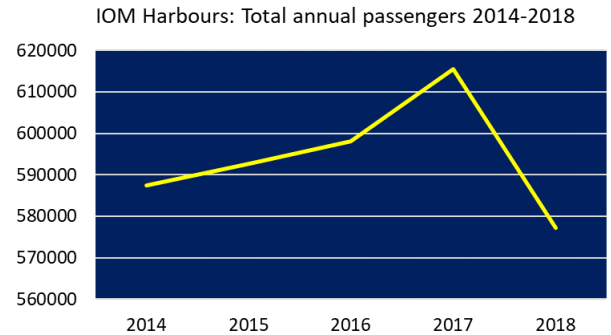


Isle of Man Monthly Harbours' Traffic Summary

December 2018 and Year end 2018

After an increase in passengers using the Isle of Man harbours of almost 3% in 2017, 2018 recorded a disappointing fall of 6.2% in passenger traffic. This effectively wiped out the steady growth achieved over recent years. Despite a marked increase in Liverpool traffic, December saw a decrease of 7.7%. Although the reduction in scheduled services traffic of 5.6% accounted for the majority of the shortfall in December, a large reduction in non-scheduled traffic was also significant.



The Island's Harbours' traffic statistics for December 2018 and the year 2018 are summarised below.

December 2018 Statistics

Overall Passengers and vehicles

- In December 2018, 20061 passengers and crews passed through Isle of Man harbours, 1,667 or 7.7% fewer than in December 2017.
- Scheduled service passengers constituted 99.8% of passengers passing through the harbours and were down by 6.5%, whilst non-scheduled numbers decreased by a whopping 85%.
- Scheduled passenger vehicles numbers were down by 4.8% over the December 2017 level.

Scheduled passengers and vehicles

- 20,011 scheduled service passengers passed through the Port in December, a decrease of 1,390 over December 2017.
- The Liverpool route actually saw an increase of over 29%, or 1,231 to 5,439 passengers.
- However, the Heysham route, declined by a huge 2,794 or 16.7%, but still accounted for some 70% of the scheduled passengers to and from the Island.
- The Belfast sailing which replaced Dublin in 2017, operated again over the Christmas period. 663 passengers were carried, an increase of 35% over the sailing in December 2017
- Scheduled passenger vehicles numbers fell by 382 in December to 7,516, a 4.8% reduction.

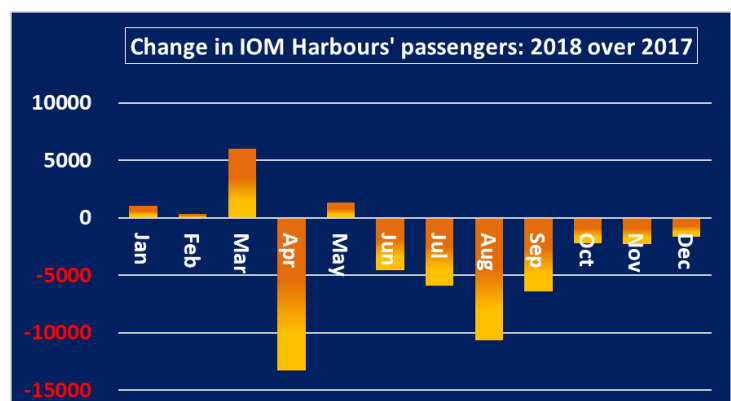
Non-Scheduled passengers and crew

- December saw a massive 84.7% decrease in non-scheduled passengers with just 50 passengers and crew movements.
- This was mainly due to substantial reductions in visiting fishing crews, and virtually no pilots and support crews activity.

2018 Annual Traffic Statistics

Overall passengers and vehicles

- A total of 577,069 passengers used the Isle of Man harbours during 2018, 38,387, or 6.2% fewer than in 2016.



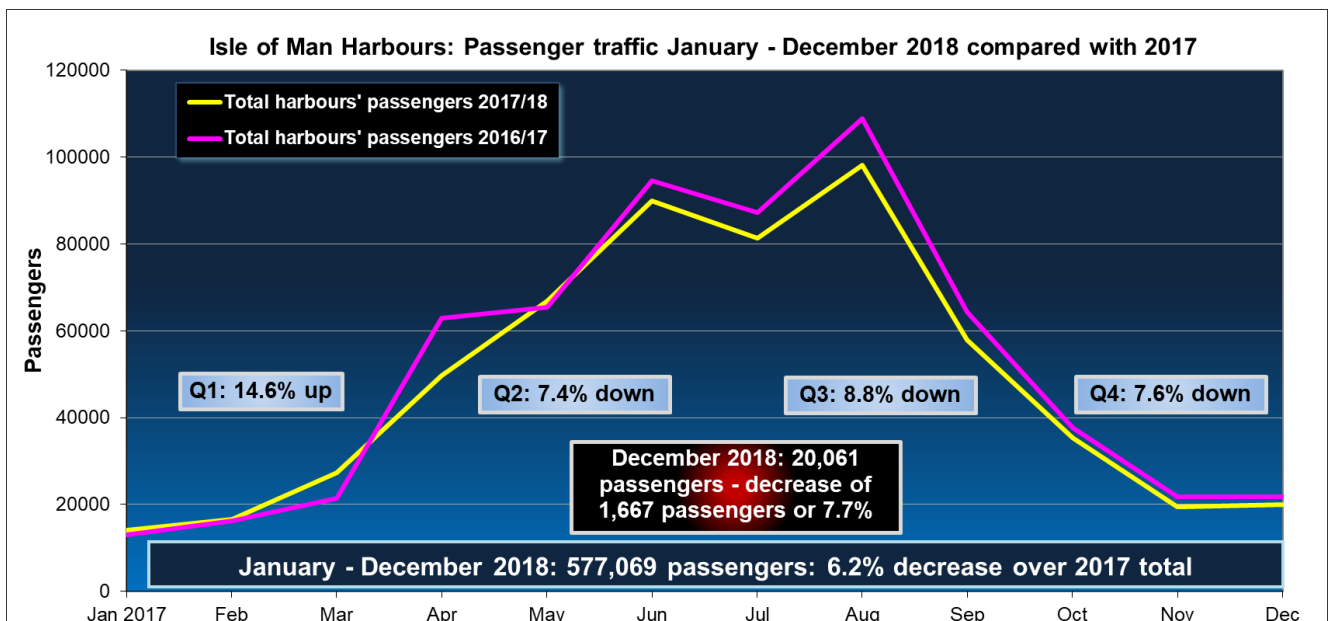
- Eight of the twelve months saw decreases, the last 7 months all experiencing reductions.
- Only the first quarter saw an increase. A 21% fall in passengers in April meant that Q2 had a 7.4% decrease, with Q3 and Q4 following with 8.8% and 7.6% decreases respectively.
- Over 551,000 passengers passing through the IOM harbours travelled on scheduled ferry sailings, 95.5% of the total.
- Non-scheduled crews and passengers declined substantially by 17.9% with 25,845 using the IOM harbours, over 5,600 fewer than in 2017.
- Scheduled service passenger vehicles saw a less worrying decrease of 3.2%.

Scheduled passengers and vehicles

- Scheduled passengers' throughput in 2018 was down by over 32,800.
- Although April saw the largest scheduled passenger fall of 12,300, this has to be set against a huge increase of 18,500 in April 2017.
- Liverpool and Heysham traffic both fell, with Liverpool down by 18,700 passengers or 6.5%. Heysham saw a smaller reduction of 11,700 – 4.4% Liverpool continued to be the strongest route, with 267,780 passengers, against 253,074 for Heysham, Liverpool accounting for 48.6% of the scheduled sea travel passenger market for the Island.
- Passengers on Dublin were slightly down by 1.7% over 2017 with 8,727 passengers.
- The Belfast route was 9.4% down, carrying 21,643 passengers.
- 180,106 scheduled passengers' vehicles were transported to and from the Island during 2018, a 3.2% decrease over 2017.

Non-Scheduled passengers and crew

- Commercial non-scheduled passengers were down in 2017 by 20% to 21,345. Marina and Non-marina passenger and crew numbers increased by 5.8% to 4,500. The withdrawal of the Karina, which carried 6,640, passengers in 2017 was the main reason for this fall.
- The 23.1% increase in cruise ship traffic was the one bright spot in a disappointing year. Cruise ship visitor numbers increased by 3,120 to 16,618.
- Fishing crews were down by 29%, and support vessel crews were slightly up on 2017 levels.
- Crews and passengers from all other categories of non-scheduled commercial activity saw decreases, the most notable being super yacht activity where there were no visiting passengers from super yachts at all during 2018, and tall ship numbers were also well down.
- The passenger traffic for 2018 compared with 2017 is summarized in the chart below:



Monthly Harbours traffic summary December 2018

Scheduled Passengers	2018	2017	change	% change
Total Passengers for the month	20011	21401	-1390	-6.5%
Cumulative for the year so far	551224	583995	-32771	-5.6%
Moving Annual total (scheduled)	551224	583995	-32771	-5.6%
Scheduled Passengers by Route:	2018	2017	change	% change
Liverpool	5439	4208	1231	29.3%
Heysham	13909	16703	-2794	-16.7%
Belfast	663	490	173	35.3%
Dublin	0	0	0	0.0%
Larne	0	0	0	0.0%
Total Scheduled Passengers	20011	21401	-1390	-6.5%
Non Scheduled Passengers	2018	2017	change	% change
Marina & non-Marina passengers				
Marina	0	0	0	0.0%
Non Marina	0	0	0	0.0%
Total Marina & Non-Marina	0	0	0	0.0%
Commercial Vessel passengers				
Cruise ships	0	0	0	0.0%
Fishing	48	160	-112	-70.0%
Karina	0	0	0	0.0%
Pilots	0	39	-39	-100.0%
Royal Navy	0	0	0	0.0%
Support	2	128	-126	-98.4%
Training ship	0	0	0	0.0%
Tall ship/Super yacht	0	0	0	0.0%
Total commercial passengers	50	327	-277	-84.7%
Total Non-Scheduled passengers	50	327	-277	-84.7%
TOTAL HARBOURS PASSENGERS	20061	21728	-1667	-7.7%
Cumulative Total Harbours Pax	577069	615456	-38387	-6.2%
Scheduled Passenger Vehicles	7516	7898	-382	-4.8%

Annual Harbours traffic summary : January - December 2018

Scheduled Passengers	2018	2017	change	% change
Total passengers carried on Scheduled Sailings	551224	583995	-32771	-5.6%
Scheduled Passengers by Route:	2018	2017	change	% change
Liverpool	267780	286451	-18671	-6.5%
Heysham	253074	264790	-11716	-4.4%
Belfast	21643	23877	-2234	-9.4%
Dublin	8727	8877	-150	-1.7%
Larne	0	0	0	0.0%
Total Scheduled Passengers	551224	583995	-32771	-5.6%
Non Scheduled Passengers	2018	2017	change	% change
Marina & non-Marina passengers				
Marina	4097	4289	-192	-4.5%
Non Marina	403	490	-87	-17.8%
Total Marina & Non-Marina	4500	4779	-279	-5.8%
Commercial Vessel passengers				
Cruise ships	16618	13498	3120	23.1%
Fishing	2408	3400	-992	-29.2%
Karina	0	6640	-6640	-100.0%
Pilots	57	162	-105	-64.8%
Royal Navy	346	636	-290	-45.6%
Support	1778	1748	30	1.7%
Training ship	124	198	-74	-37.4%
Tall ship/Super yacht	14	400	-386	-96.5%
Total commercial passengers	21345	26682	-5337	-20.0%
Total Non-Scheduled passengers	25845	31461	-5616	-17.9%
TOTAL HARBOURS PASSENGERS	577069	615456	-38387	-6.2%
Scheduled Passenger Vehicles	180106	186139	-6033	-3.2%