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IAATO Overview of Antarctic Tourism: The 2022-23 Season, and Preliminary Estimates for 2023-24

IAATO Overview of Antarctic Vessel Tourism: The 2022-23 Season, and Preliminary Estimates for 2023-24

Information Paper Submitted by the International Association of Antarctica Tour Operators (IAATO)

Introduction

IAATO is pleased to provide the statistical data compiled from Post Visit Reports for the 2022-23 season and the preliminary estimates for 2023-24 season as of 01 May, 2023.

It should be noted at the outset that the worldwide SARS-CoV-2 pandemic has had a significant impact on Antarctic private sector travel and consequently the historical numbers reported in this paper. Specifically, we draw attention to the fact that:

- During the 2020-2021 season, and the height of the pandemic, only two yachts and 15 visitors operated in the Peninsula area. As this was not a representative season for IAATO the 2020-2021 data has been omitted from overall reporting in this paper.
- During the 2021-2022 season there was a resumption of activities however these numbers remained depressed as some Operators took the difficult decision not to operate. Furthermore, as Omicron became prevalent, others chose to cancel expeditions or curtail their season. Lastly, in many cases, Operators also had lower occupancy as fewer clients travelled.

We also take this opportunity to build on discussions with different Treaty Parties around growth and diversification of activities, by including a historical perspective which may aid ongoing considerations. The data presented throughout this paper is based on information provided to IAATO by its Operators in Post Visit Reports (PVRs). Visitor numbers reflect only those travelling with IAATO Operator companies and do not include Observers, Government Officials, or those individuals taking part in research projects that are being supported by IAATO Operators. It also does not include information from any non-IAATO operators.

IAATO Operator activities are permitted or authorized through Environmental Impact Assessments, Advance Notifications and, where relevant, Waste Management Permits, and submitted in advance of the season. Nearly all activities, which follow ATCM and IAATO policies and guidelines, have been authorized and conducted on expeditions for more than two decades, and in many cases since the beginning of Antarctic tourism circa the 1960's. IAATO Operators conduct their operations in a safe and environmentally responsible manner, and all activities are planned to have no more than a minor or transitory impact on the Antarctic environment.

1.0 Historical Overview on Managing for Growth

1.1 IAATO Member Activities and Managing for Growth

The growth of the Antarctic tourism industry is a topic of great interest within the Antarctic and worldwide communities. In past three decades, IAATO has seen two other periods of growth - once during the mid-1990s and then again in the period 2003-2008. During each of these periods of growth, and in the intervening break, IAATO has implemented a series of tourism management measures, many of which were subsequently adopted by the ATCPs. With advancements in technology, reporting and communications, and building on lessons learned in the past, IAATO has been able to accurately forecast and monitor growth, making measured

decisions and advancements to properly position the organization as changes happen, and be fleet of foot to respond as appropriate.

As forecasted, the 2022-23 activity levels exceeded pre-pandemic rates. Anticipating this and the continued increase in numbers of passengers and vessels, IAATO continues to strengthen, test, and refine its suite of 'tools' to ensure the continued successful management of activities.

In this current period of tourism growth, there is an opportunity for all Antarctic Stakeholders to work together to continue evolving a pragmatic approach to tourism management – this was demonstrated at the recent Paris Workshop, March 8-10, 2023, "The future of Antarctic tourism: time to adopt a common vision and to build a basic policy program." IAATO looks forward to continued communication and collaboration around tourism management.

Incremental changes on existing tools have been made during the past ten years to address the continued increase in activities. Figures 1.1 - 1.3 give an overview of some of the key growth management tools introduced by IAATO during three periods of growth between 1993-Present.

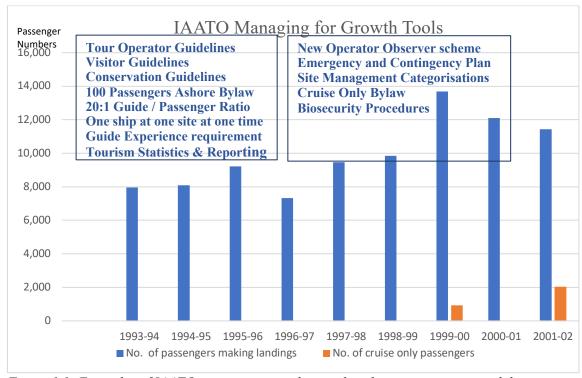


Figure 1.1: Examples of IAATO management tools introduced in response to growth between 1993 and 2001

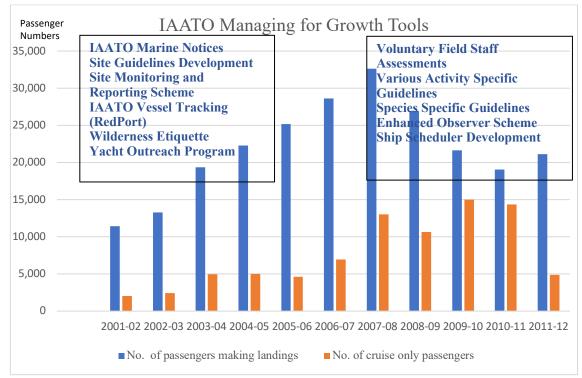


Figure 1.2: Examples of IAATO management tools introduced in response to growth between 2001 and 2011

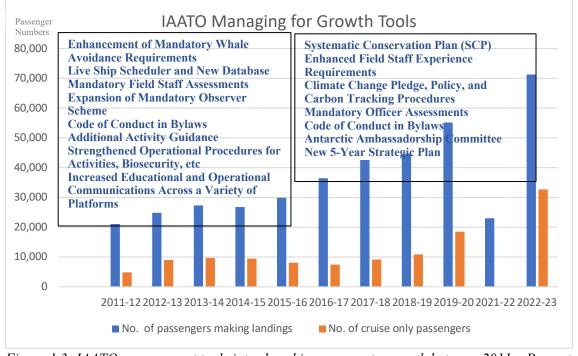


Figure 1.3: IAATO management tools introduced in response to growth between 2011 – Present

1.2 IAATO Member Nationalities

Reflecting on the latest period of growth, 2014-2022, the Post Visit Reports submitted to IAATO indicate the top 10 nationalities who visited Antarctica have remained relatively consistent over the last ten seasons, although proportionately and prior to the pandemic, China had seen the greatest increase in travelers to Antarctica. An overview of the last 10 years can be found in *Figure 2*.



Figure 2: Top 10 Passenger nationalities (vessel and deep field) travelling with IAATO operators between 2014-2022

2.0 IAATO Vessel Operations Overview

This section focuses on IAATO Vessel Operations, and includes yacht activities.

For Deep Field and Air Operator information please refer to ATCM XLV IP057 *IAATO Deep Field and Air Overview of Antarctic Tourism: 2022-23 Season and Preliminary Estimates for 2023-24 Season.*

2.1 IAATO Vessel Activities

For the last 31 years shipborne tourism on the Peninsula has been the dominant vector of travel. The vast majority of tourism voyages (98%) operate in the Antarctic Peninsula region during the seven-month austral summer season (from October to April), and depart from Ushuaia, Argentina or, to a lesser extent, from other ports north of the Antarctic Treaty Area.

During the 2022-23 season, two non-IAATO cruise only Operators conducted activities in Antarctica. Both Operators were authorized/permitted, and collaborated on SAR information with IAATO. One of these non-IAATO Operators was voted in as a Provisional Operator at the 2023 IAATO annual meeting. To the best of our knowledge, all other commercial SOLAS passenger ship Operators conducting tourism activities in the Antarctic Treaty Area are members of IAATO.

Table 1. offers a summary of the last decade 2012-13 –2022-23) of both IAATO SOLAS and non-SOLAS vessel tourism (including Yachts and Cruise Only).

Table 1. 10-Year Statistics of Seaborne Tourism (including Yachts and Cruise Only)

Based on IAATO Post Visit Reports.

Year	No. of operators	No. of ships & yachts	No. of voyages	No. of passengers making landings	No. of cruise only passengers
2012- 13	39	45	258	24,892	9,070
2013- 14	42	51	283	27,374	9,670
2014- 15	37	44	268	26,812	9,459
2015- 16	38	48	286	29,960	8,109
2016- 17	38	47	298	36,440	7,475
2017- 18	44	50	344	42,576	9,131
2018- 19	44	56	360	44,600	10,889
2019- 20	47	62	408	55,164	18,506
2021- 22	40	48	236	23,023	0
2022- 23	50	60	540	71,346	32,730

In accordance with IAATO Bylaws Article X – Section B, all Operators and Provisional Operators are to comply with operational conditions pursuant to the Antarctic Treaty System, including the Antarctic Treaty and the Protocol on Environmental Protection to the Antarctic Treaty, along with IMO Conventions and similar international and national laws and agreements.

2.2 Scope of IAATO Vessel Activities

Commercial tourist activities included the operation of small inflatable boats (Zodiac, Polar Cirkle Boats, R.I.B., Naiad, etc.), shore landings, and to a lesser extent activity such as, but not limited to, kayaking, climbing, and short overnight stays.

Through the years descriptions and the type of activities have been expanded in the Post Visit Reports to facilitate greater accuracy for reporting and planning. For instance, RPAS Flights, although banned recreationally in coastal waters by IAATO, has been expanded to differentiate between commercial, scientific, and operational/navigation flights. Likewise, what was once described as swimming, has now been expanded to swimming – distance and polar plunge.

Representing the current expansion of descriptions during this last period of growth, *Figure 3* illustrates activities offered by IAATO vessels including yachts, during the 2022-2023 season. Small boat cruising and landings remain the most popular activities (49%) for vessels, while scenic ship cruising also remains a key activity. A range of other activities (e.g., kayaking, and

short overnight stays) contribute to a smaller portion (8%) of off-ship activities. It is anticipated that ship cruising, small boat cruising and small boat landings will continue to be the dominant activities and other activities will remain small scale in comparison.

For more information on IAATO Operator activities see ATCM XLII IP145 A Catalogue of IAATO Operator Activities.

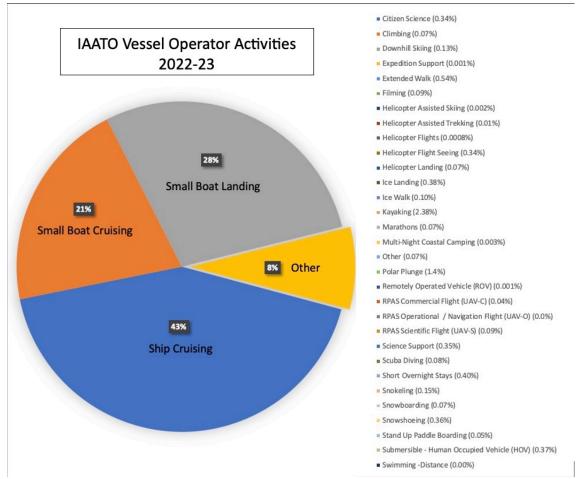


Figure 3: Commercial Operated Activities Conducted from Expedition Vessels and Yachts for 2022-23

4.0 Preliminary Estimate of Planned Vessel Activities for the 2023-24 Season

Preliminary estimates for Vessels, found in Appendix 2, for the 2023-24 season are as of 01 May, 2023. These estimates represent the anticipated operating scenario for the 2023-24 season.

5.0 Tourism Statistics

In order to assist further with providing data on IAATO activities, the following data are publicly available through an access portal on the IAATO website (https://iaato.org/information-resources/data-statistics/visitor-statistics/):

- Tourists by Nationality (Landed)
- Tourists by Nationality (Air and Cruise)
- Tourists by Nationality (All)
- Number of Vessel based Tourists per Site per Activity Ross Sea Region
- Number of Vessel based Tourists per Site per Activity Peninsula
- Number of Vessel based Tourists per Site per Activity All Regions

Appendices:

- Appendix 1: Overview of Antarctic Vessel Tourism 2022-23 (As of May 01, 2023)
- Appendix 2: Preliminary Estimate of Antarctic Vessel Tourism 2022-2023 (As of May 01, 2023)

Appendix 1: Overview of Antarctic Tourism 2022-23

SUMMARY OF ACTUALS for 2022-2023 SEASON
(All tourist types)
*Note all numbers and company status are subject to change and are based on reports as of

Types of Tourism	Number of Vessels	Number of Departures	Total Number of Passengers
IAATO Traditional Seaborne Tourism Peninsula	46	400	64057
IAATO Seaborne Tourism Ross Sea / Continental	5	9	1066
IAATO Sailing Vessels / Yacht Tourism Peninsula	9	16	109
IAATO Air-Cruise Peninsula	14	96	6114
IAATO Large Ships/ Cruise - Only Peninsula	8	19	32730
Total		540	104,076

IAATO Members Tra	nditional Seaborne Touris	sm - Peninsula	Region - 202	22-2023
Vessel	Operator / Charterer	NCA	Actual # Voyages	Actual # of Passengers
Bark Europa	Rederij Bark EUROPA B.V.	Netherlands	5	171
Expedition	G Adventures	Canada	13	1573
Fram	Hurtigruten Expeditions	Norway	8	1287
Greg Mortimer	Aurora Expeditions	Australia	8	774
Hamburg	Plantours Kreuzfahrten	Germany	4	1100
HANSEATIC inspiration	Hapag-Lloyd Cruises	Germany	5	927
HANSEATIC nature	Hapag-Lloyd Cruises	Germany	6	1011
HANSEATIC spirit	Hapag-Lloyd Cruises	Germany	4	708
Hebridean Sky	Grand Circle Corporation	USA	8	754
Hondius	Oceanwide Expeditions	Netherlands	11	1800
Island Sky	Noble Caledonia	U.K.	2	195
Island Sky	Polar Latitudes	USA	5	467
IAATO Members Tra	ditional Seaborne Touris	sm - Peninsula	Region - 202	22-2023
Vessel	Operator / Charterer	NCA	Actual # Voyages	Actual # of Passengers
L'Austral	Ponant	France	12	1921
Le Boreal	Ponant	France	11	1806

Le Commandant Charcot	Ponant	France	6	931
Le Lyrial	Abercrombie & Kent USA, LLC	USA	4	592
Le Lyrial	Ponant	France	5	635
Magellan Explorer	Antarctica21	Chile	3	239
MS Fridtjof Nansen	Hurtigruten Expeditions	Norway	14	4975
MS Roald Amundsen	Hurtigruten Expeditions	Norway	11	3549
National Geographic Endurance	Lindblad Expeditions	USA	4	471
National Geographic Explorer	Lindblad Expeditions	USA	11	1465
National Geographic Resolution	Lindblad Expeditions	USA	9	1069
Ocean Adventurer	Quark Expeditions	USA	7	694
Ocean Diamond	Quark Expeditions	USA	10	1482
Ocean Endeavour	Intrepid	Australia	13	2198
Ocean Explorer	Vantage Deluxe World Travel	USA	4	434
Ocean Nova	Antarctica21	Chile	3	195
Ocean Nova	Grands Espaces	France	1	67
Ocean Victory	Albatros Expeditions	USA	13	2221
Ortelius	Oceanwide Expeditions	Netherlands	7	693
Plancius	Cheesemans' Ecology Safaris	USA	2	163
Plancius	Oceanwide Expeditions	Netherlands	10	1055
Scenic Eclipse	Scenic Tours (USA) Inc	USA	9	1657
Sea Spirit	Poseidon Expeditions	USA	11	1120
Seabourn Quest	Seabourn Cruise Line Ltd.	USA	1	398
Seabourn Venture	Seabourn Cruise Line Ltd.	USA	9	1874
Seaventure	Polar Latitudes	USA	11	1317
IAATO Members Tra	ditional Seaborne Touris	sm - Peninsula		22-2023
Vessel	Operator / Charterer	NCA	Actual # Voyages	Actual # of Passengers
SH Vega	Swan Hellenic	USA	11	1061
Silver Cloud	Silversea Cruises Ltd.	USA	9	1846
Silver Endeavour	Silversea Cruises Ltd.	USA	2	254
Silver Wind	Silversea Cruises Ltd.	USA	9	1927
Sylvia Earle	Aurora Expeditions	Australia	4	435
Ultramarine	Quark Expeditions	USA	11	1265
Ushuaia	Antarpply Expeditions	Argentina	17	1396
Viking Octantis	Viking	Norway	11	3712

Viking Polaris	Viking	Norway	10	3153
World Explorer	Quark Expeditions	USA	10	1266
World Navigator	Atlas Ocean Voyages	USA	13	1938
World Traveller	Atlas Ocean Voyages	USA	13	1816
		Totals:	400	64057

IAATO Members Air-Cruise Tourism - Peninsula Region - 2022-2023					
Vessel	Operator / Charterer	NCA	Actual # Voyages	Actual # of Passengers	
El Doblón	Alegria Marineros Expediciones	Spain	2	16	
Greg Mortimer	Aurora Expeditions	Australia	4	261	
Legend	EYOS Expeditions Ltd.	U.K.	4	42	
Magellan Explorer	Antarctica21	Chile	19	1235	
MY Hans Hansson	Quixote Expeditions	USA	5	47	
MY Hanse Explorer	"Hanse Explorer" GmbH & Co. KG	Germany	3	29	
Nansen Explorer	EYOS Expeditions Ltd.	U.K.	5	19	
Ocean Adventurer	Quark Expeditions	USA	8	784	
Ocean Nova	Antarctica21	Chile	15	899	
Octopus	EYOS Expeditions Ltd.	U.K.	4	47	
S/V Ocean Tramp	Quixote Expeditions	USA	6	41	
Silver Endeavour	Silversea Cruises Ltd.	USA	12	1731	
Sylvia Earle	Aurora Expeditions	Australia	6	643	
World Explorer	Quark Expeditions	USA	3	320	
		Totals:	96	6114	

IAATO Members Yacht Tourism - Peninsula Region - 2022-2023				
Vessel	Operator / Charterer	NCA	Actual # Voyages	Actual # of Passengers
El Doblón	Alegria Marineros Expediciones	Spain	2	18
Nansen Explorer	EYOS Expeditions Ltd.	U.K.	1	6
S/V Australis	Ocean Expeditions LLC	Australia	1	7
S/V Podorange	Voile Australe	France	1	7
S/V Santa Maria Australis	SIM Expeditions	Germany	3	14
S/V Selma Expeditions	Selma Expeditions	Poland	3	24
S/V Spirit of Sydney	Spirit of Sydney Expeditions	Australia	3	20
S/Y Jagare	Spirit of Sydney Expeditions	Australia	1	8

S/Y YPAKE II	SUR Expeditions	Brazil	1	3	
		Totals:	16	109	

IAATO Members Seaborne Tourism – Continental/Ross Sea - 2022-2023				
Vessel	Operator / Charterer	NCA	Actual # Voyages	Actual # of Passengers
Heritage Adventurer	Heritage Expeditions	New Zealand	2	271
Le Commandant Charcot	Ponant	France	2	229
Le Soleal	Ponant	France	1	196
National Geographic Endurance	Lindblad Expeditions	USA	2	203
Ortelius	Oceanwide Expeditions	Netherlands	2	167
		Totals:	9	1066

IAATO Cruise Only Tourism - Peninsula Region - 2022-2023				
Vessel	Operator / Charterer	NCA	Actual # Voyages	Actual # of Passengers
Celebrity Infinity	Celebrity Cruise Lines/Royal Caribbean Group	USA	4	8161
M/V Norwegian Star	Norwegian Cruise Lines Holdings	USA	4	8462
M/V Oceania Insignia	Norwegian Cruise Lines Holdings	USA	1	603
M/V Seven Seas Voyager	Norwegian Cruise Lines Holdings	USA	1	601
MS Marina	Norwegian Cruise Lines Holdings	USA	2	2331
Oosterdam	Holland America Line	USA	3	5115
Sapphire Princess	Princess Cruises	USA	3	6288
Volendam	Holland America Line	USA	1	1169
		Totals:	19	32730

Appendix 2: Preliminary Estimate of Antarctic Tourism 2023-2024 (As of May 01, 2023)

SUMMARY OF ESTIMATES for 2023-2024 SEASON	
(All tourist types)	

*Note all numbers and company status are subject to change and are preliminary estimates only

Types of Tourism	Number of Vessels	Number of Departures	Total Number of Passengers
IAATO Traditional Seaborne Tourism Peninsula	49	445	71165
IAATO Seaborne Tourism Ross Sea / Continental	5	9	1170
IAATO Sailing Vessels / Yacht Tourism Peninsula	6	16	141
IAATO Air-Cruise Peninsula	12	82	5756
IAATO Large Ships/ Cruise - Only Peninsula	8	22	39140
Total		574	117,372

IAATO Members Tr	aditional Seaborne To	urism - Peninsul	a Region - 2023	3-2024
Vessel	Operator / Charterer	NCA	Est. # Voyages	Est. # of Passengers
Bark Europa	Rederij Bark EUROPA B.V.	Netherlands	4	152
Expedition	G Adventures	Canada	13	1625
Fram	Hurtigruten Expeditions	Norway	8	1440
Greg Mortimer	Aurora Expeditions	Australia	8	880
Hamburg	Plantours Kreuzfahrten	Germany	3	840
HANSEATIC inspiration	Hapag-Lloyd Cruises	Germany	5	900
HANSEATIC spirit	Hapag-Lloyd Cruises	Germany	3	540
Hondius	Oceanwide Expeditions	Netherlands	12	2040
Island Sky	Noble Caledonia	U.K.	2	180
IAATO Members Tr	aditional Seaborne To	urism - Peninsul	a Region - 2023	5-2024
Vessel	Operator / Charterer	NCA	Est. # Voyages	Est. # of Passengers
L'Austral	Ponant	France	10	1200
Le Boreal	Ponant	France	12	1440

Le Commandant Charcot	Ponant	France	5	600
Le Lyrial	Abercrombie & Kent USA, LLC	USA	3	480
Le Lyrial	Ponant	France	6	720
Magellan Explorer	Antarctica21	Chile	4	240
MS Fridtjof Nansen	Hurtigruten Expeditions	Norway	14	4200
MS Roald Amundsen	Hurtigruten Expeditions	Norway	12	3600
National Geographic Endurance	Lindblad Expeditions	USA	5	675
National Geographic Explorer	Lindblad Expeditions	USA	10	1350
National Geographic Resolution	Lindblad Expeditions	USA	9	1215
Ocean Adventurer	Quark Expeditions	USA	7	672
Ocean Albatros	Albatros Expeditions	USA	15	2475
Ocean Endeavour	Intrepid	Australia	13	2340
Ocean Explorer	Vantage Deluxe World Travel	USA	12	1440
Ocean Nova	Antarctica21	Chile	2	110
Ocean Victory	Albatros Expeditions	USA	14	2240
Ortelius	Oceanwide Expeditions	Netherlands	12	1200
Plancius	Cheesemans' Ecology Safaris	USA	1	100
Plancius	Oceanwide Expeditions	Netherlands	10	1080
Scenic Eclipse	Scenic Tours (USA) Inc	USA	10	1400
Scenic Eclipse II	Scenic Tours (USA) Inc	USA	7	980
Sea Spirit	Poseidon Expeditions	USA	12	960
Seabourn Pursuit	Seabourn Cruise Line Ltd.	USA	10	2600
IAATO Members Tra	ditional Cook away To	uwiam Daningul	a Dagian 2022	2 2024
	Operator /		Est. #	Est. # of
Vessel	Charterer	NCA	Voyages	Passengers
Seabourn Quest	Seabourn Cruise Line Ltd.	USA	1	476
Seabourn Venture	Seabourn Cruise Line Ltd.	USA	8	2080
Seaventure	Polar Latitudes	USA	11	1320
SH Diana	Swan Hellenic	USA	9	810
	1	1		0==
SH Minerva	Swan Hellenic	USA	13	975

		Totals:	445	71165
World Traveller	Atlas Ocean Voyages	USA	13	2288
World Navigator	Atlas Ocean Voyages	USA	13	2288
World Explorer	Quark Expeditions	USA	10	1290
Viking Polaris	Viking	Norway	10	3700
Viking Octantis	Viking	Norway	11	4070
Ushuaia	Antarpply Expeditions	Argentina	16	1200
Ultramarine	Quark Expeditions	USA	12	1788
The World	The World, Residences at Sea	USA	3	900
Sylvia Earle	Aurora Expeditions	Australia	9	990
Silver Wind	Silversea Cruises Ltd.	USA	8	1760
Silver Endeavour	Silversea Cruises Ltd.	USA	5	880
Silver Cloud	Silversea Cruises Ltd.	USA	8	1536

IAATO Members Air-Cruise Tourism - Peninsula Region - 2023-2024					
Vessel	Operator / Charterer	NCA	Est. # Voyages	Est. # of Passengers	
Greg Mortimer	Aurora Expeditions	Australia	4	440	
Legend	Cookson Adventures	U.K.	1	12	
Legend	EYOS Expeditions Ltd.	U.K.	4	88	
Magellan Explorer	Antarctica21	Chile	18	1080	
MY Hans Hansson	Quixote Expeditions	USA	5	55	
MY Hanse Explorer	"Hanse Explorer" GmbH & Co. KG	Germany	4	40	
Nansen Explorer	EYOS Expeditions Ltd.	U.K.	2	24	
Ocean Adventurer	Quark Expeditions	USA	7	672	
Ocean Nova	Antarctica21	Chile	16	880	
S/V Ocean Tramp	Quixote Expeditions	USA	5	35	
Silver Endeavour	Silversea Cruises Ltd.	USA	9	1584	
Sylvia Earle	Aurora Expeditions	Australia	3	330	
World Explorer	Quark Expeditions	USA	4	516	
		Totals:	82	5756	

IAATO Members Yacht Tourism - Peninsula Region - 2023-2024				
Vessel	Operator / Charterer	NCA	Est. # Voyages	Est. # of Passengers
El Doblón	Alegria Marineros Expediciones	Spain	4	48
S/V Australis	Ocean Expeditions LLC	Australia	3	27
S/V Ocean Tramp	Quixote Expeditions	USA	1	7
S/V Podorange	Voile Australe	France	2	14
S/V Selma Expeditions	Selma Expeditions	Poland	3	24
S/V Spirit of Sydney	Spirit of Sydney Expeditions	Australia	3	21
		Totals:	16	141

IAATO Members Seaborne Tourism – Continental/Ross Sea - 2023-2024				
Vessel	Operator / Charterer	Country	Est. # Voyages	Est. # of Passengers
HANSEATIC spirit	Hapag-Lloyd Cruises	Germany	1	180
Heritage Adventurer	Heritage Expeditions	New Zealand	2	280
Le Commandant Charcot	Ponant	France	2	240
Le Soleal	Ponant	France	2	200
National Geographic Endurance	Lindblad Expeditions	USA	2	270
		Totals:	9	1170

IAATO Cruise Only Tourism - Peninsula Region - 2023-2024				
Vessel	Operator / Charterer	Country	Est. # Voyages	Est. # of Passengers
Celebrity Eclipse	Celebrity Cruise Lines/Royal Caribbean Group	USA	4	10000
M/V Norwegian Star	Norwegian Cruise Lines Holdings	USA	5	6250
M/V Seven Seas Voyager	Norwegian Cruise Lines Holdings	USA	2	1388
MS Marina	Norwegian Cruise Lines Holdings	USA	3	3744
Oosterdam	Holland America Line	USA	3	5892
Sapphire Princess	Princess Cruises	USA	3	8034
Serenade of the Seas	Celebrity Cruise Lines/Royal Caribbean Group	USA	1	2400
Zaandam	Holland America Line	USA	1	1432
		Totals:	22	39140