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IAATO Overview of Antarctic Tourism: 2012-13 Season and Preliminary Estimates for 2013-14 Season

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

Introduction

IAATO is pleased to provide an overview of Antarctic tourism from IAATO operators for the recently completed 2012-13 season and estimates for the 2013-14 season.

The total number of passengers and clients, including cruise-only, carried by IAATO operators during the 2012-13 season increased to 34,316. While this is an increase of 29.4% over the previous 2011-12 Antarctic tourism season (26,519), the total is not significantly different than 2009-10 and 2010-11 when totals were 36,881 and 33,824 respectively. Details of the 2012-13 season can be found in Appendix 1 of this paper.

The increase was due to several factors. These included a mild resurgence of voyages by cruise-only vessels carrying more than 500 passengers from five to seven, accounting for 9,070 passengers, which is approximately 5,000 more than the previous year. Landings in the Antarctic Treaty area are not permitted from vessels carrying more than 500 passengers.

Growth was also seen in the tourism segment that includes traditional small and medium-size expedition ships and yachts – all carrying 500 or fewer passengers and conducting landings – from 20,271 to 23,305 passengers. Numbers increased in the air-cruise category, up from 860 during 2011-12 to 1,587 for the season just ended. Air-land tourism declined more than 30% from 516 to 354 visitors during the 2012-13 season.

Estimates for the 2013-14 season can be found in Appendix 3 of this paper. These estimates are based on information provided to IAATO by its operators as of May 7, 2013, and indicate only a minor increase of 3% to a total of 35,354 tourists.

1.0 Overview

1.1 IAATO Member Activities

IAATO's Membership continues to incorporate the majority of private-sector tour operators. All commercial SOLAS passenger ship operators conducting tourism activities in the Antarctic Treaty area are current members of IAATO. All of these operators have submitted Environmental Impact Assessments (Initial Environmental Evaluations or Preliminary Assessments) or operational documents to their appropriate National Authority.

A summary of IAATO operator activities for the 2012-13 season follows:

- 24,892 passengers landed from seaborne vessels in the Antarctic Treaty Area, a 17.7% percent increase over the previous season's total of 21,131 vessel-landed passengers. Of this total:
 - 22,369 passengers aboard 178 voyages on traditional seaborne vessels landed in the Antarctic Peninsula area, a 16.1% increase over the previous season's 19,269 passengers and 173 voyages;
 - 608 passengers took part in eight voyages to the Ross Sea or Continental region of Antarctica, a decrease from the previous season's 773 passengers and 11 voyages;
 - 328 passengers sailed on 41 trips aboard yachts (sailing or motor) that carry 12 or fewer passengers to the Antarctic Peninsula area, an increase over the previous season's 229 passengers and 30 trips;

- 1,587 passengers participated in 24 air-cruise trips in the Antarctic Peninsula area, flying to/from King George Island (either one-way or round-trip) from/to South America to embark a vessel and cruise for approximately one week, making landings. This represents an increase over the 860 passengers and 15 air-cruise trips during the 2011-12 season. The three IAATO operators participating in this air-cruise segment included one operator with a decade of air-cruise experience and two other operators – both experienced in traditional seaborne cruising – offering the air-cruise concept for the second season in a row.
- 9,070 passengers travelled on seven voyages aboard 500-plus-passenger vessels operating “cruise-only” voyages, making no landings in the Antarctic Treaty Area. This represents an increase from the 4,872 passengers and five voyages of the 2011-12 season, but is less than the 14,373 passengers and 10 cruise-only voyages during the 2010-11 season.
- 354 clients participated in expeditions in the continental interior, a decrease from the 516 clients in this segment during the 2011-12 season.
- No passengers participated in IAATO operator over-flights to the Antarctic continent.

1.2 Scope of Commercial Tourist Activities for Seaborne Tourism

Commercial tourism activities included the operation of small boats (Zodiac, Polar Circle Boat, R.I.B., Naiad, etc.), shore landings, and to a lesser extent, kayaking, mountain climbing, SCUBA diving, skiing, snowboarding, camping (including short overnight stays), running events, helicopter operations and use of an underwater ROV. Most of these activities have taken place for the past decade with some dating back to the beginning of Antarctic tourism in the late 1960s.

Appendices 1 and 3 to this overview provide further details of the scope of IAATO-member activities, including vessel/aircraft, departures, passenger numbers and activities.

Table 1. Historical Statistics of Recorded Seaborne Tourism (including Cruise Only)

Based on data provided by companies who submitted Post Visit Report Forms and from other sources where available.

Year	# of Operators or Charterers	# of Ships & Yachts	# of Voyages	# of Passengers Making Landings	# of Cruise Only Passengers
1992-93	10	12	59	6,704	
1993-94	9	11	65	7,957	
1994-95	9	14	93	8,098	
1995-96	10	15	113	9,212	
1996-97	11	13	104	7,322	
1997-98	12	13**	92*	9,473	
1998-99	15	15**	116	9,857	
1999-00	17	21**	154	13,687	936
2000-01	15**	32**	131*	12,109	0
2001-02	19**	37**	117*	11,429	2,029
2002-03	26**	47**	136*	13,263	2,424
2003-04	31**	51**	180*	19,369	4,949
2004-05	35**	52**	207*	22,297	5,027
2005-06	47**	44**	249*	25,167	4,632
2006-07	42**	47**	268*	28,622	6,930
2007-08	48*	55*	308*	32,637	13,015
2008-09	44*	53*	290*	26,921	10,652
2009-10	44*	51*	239*	21,622	15,020
2010-11	41*	47*	223*	19,065	14,373
2011-12	36*	41*	234*	21,131	4,872
2012-13	39*	45*	258*	24,892	9,070

* Does not include non-IAATO member-operated yachts (sailing and motor).

** Includes IAATO and non-IAATO member-operated yachts (sailing and motor) where the information was available.

The vast majority of tourism voyages operate in the Antarctic Peninsula region during the five-month austral summer season (from November to March), departing from Ushuaia or, to a lesser extent, from other ports north of the Antarctic Treaty Area.

1.3 Nationalities

The Post Visit Report Forms submitted to IAATO indicate that more than 100 different nationalities were represented in tourists who visited the Antarctic during the 2012-13 season. The majority (83.3 percent) came from eight different countries (see Table 2).

Table 2: Percentage of Passenger Nationalities (as of May 7, 2012)

Nationality	Percentage of total
United States	31.1
Germany	11.1
Australia	10.8
United Kingdom	10.2
China	6.8
Canada	5.8
Switzerland	3.0
France	2.9
Other	18.3

1.4 Commercial Tour Vessels Operating in 2012-13

A full list of IAATO member-operated commercial tour vessels that completed cruises to the Antarctic, including information on their registry, permitting authority and passenger capacity is given in Appendix 1. In total, there were 21 vessels carrying 13-200 passengers; three vessels carrying 201-500 passengers; plus four cruise-only vessels each carrying more than 500 passengers.

1.5 Yacht (Sailing and Motor) Activities

Seventeen yachts carrying 12 or fewer tourists visited the Antarctic Treaty Area by IAATO member yacht operators during the 2012-13 season. This information is also detailed in Appendix 1.

IAATO yacht operators accounted for 56.2% of the yachts sighted in the Antarctic Treaty Area during 2012-13, an increase from the 37.8 percent of the total known number of yachts visiting Antarctica during 2011-12. Noting that a greater percentage of the non-IAATO yachts sighted seem to be securing authorization, IAATO is pleased that the yacht outreach campaign seems to have been effective. The intention is to continue that campaign as the issue of non-authorized yachts, whose crews may not be familiar with the Environmental Protocol and its obligations or the peculiarities of the Antarctic environment, remains a concern. Yacht sightings in the Antarctic Peninsula are further described in *ATCM XXXVI IP54 Data Collection and Reporting on Yachting Activity in Antarctica in 2012-13*.

1.6 IAATO Member-Operated Activities Conducted from Expedition Vessels and Yachts

Details of the activities offered are listed in Appendix 1 and Appendix 3. All activities are approved or authorized through the Environmental Impact Assessments and Advance Notification submitted in advance of the season. All activities are intended to have no more than a minor or transitory impact on the Antarctic environment and have been conducted from expedition vessels and yachts for more than a decade. Additional information on Antarctic Peninsula activities is presented in *ATCM XXXV IPXX Report on IAATO Operator use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines, 2012-13 Season*.

1.7 Commercial Land Tourism

Three IAATO operators conducted land tourism activities during the 2012-13 season. Adventure Network International / Antarctic Logistics & Expeditions (ALE) – one of the founding members of IAATO in 1991 –

conducted activities for the 27th consecutive season; and The Antarctic Company (TAC) operated in Antarctica for the eight consecutive season and fourth as an IAATO operator.

The third company is White Desert (WDL), which operated in Antarctica for the seventh consecutive season and second as an IAATO operator. Flights and logistics for WDL are coordinated through TAC.

ALE operated out of Punta Arenas, Chile; TAC and WDL operated out of Cape Town, South Africa.

The three companies employed experienced guides; over 80% of which have worked previously in Antarctica. Staff and guides assist in the preparation of policies and guidelines, and ensure their implementation in Antarctica.

1.7.1 Visitor & Staff Numbers

Table 3: Land Operator Client and Staff Numbers

Operator	Clients	Staff and Guides *
ALE	313	138
TAC	22	7
WDL	19	12
Total	354	157

* In some cases in Table 3, staff and guides of client companies are considered clients when not employed directly by ALE, TAC or WDL.

1.7.2 Aircraft Operations

ALE:

- An Ilyushin-76 was used to ferry general and hazardous cargo, fuel, staff, guides and clients from Punta Arenas to SCGC Runway 18M Union Glacier.
- Two ski-equipped DHC-6 Twin Otter aircraft and one ski-equipped Douglas DC-3 aircraft were used for flights in Antarctica and to support medical evacuation throughout the Antarctic season.

TAC:

- An Ilyushin-76 was used to ferry general cargo, staff, guides and clients from Cape Town to ALCI Airbase / Novo Runway, chartered by Antarctic Logistics Center International (ALCI).
- Two ski-equipped DC-3 aircraft were used for flights within Antarctica and SAR support during the Antarctic season, in conjunction with ALCI.

1.7.3 Traverses

- Both ALE and TAC operated a number of motorised traverses, primarily for more efficient transport of fuel and cargo. These were conducted in support of both scientific activities and non-governmental expeditions.

1.7.4 Camps

- ALE Union Glacier Camp opened October 24, 2012 and closed February 19, 2013.
- TAC Camp opened November 11, 2012 and closed February 28, 2013.
- WDL Camp opened November 6, 2012 and closed January 29, 2013.

1.7.5 Programs and Activities

Activities including the operation of standard programs, the organization and operation of private expeditions, and logistical support of other expeditions, are outlined in Tables 4-6. Note that some clients participated in multiple programs.

Table 4: ALE Programs and Participant Numbers (clients, staff and guides)

ALE Program	Number of Participants
Emperor Penguin	11
Antarctic Odyssey	4
Climb Antarctica	6
Last Degree	59
Marathon	51
South Pole Fly-In	65
South Pole Ski – Hercules Inlet	4
South Pole Ski – Messner	3
Mount Sidley	3
Vinson Massif	132
Total	338

Table 5: TAC Programs and Participant Numbers (clients, staff and guides)

TAC Program	Number of Participants
Queen Maud Land Flight Excursion	2
South Pole and Emperor Penguins	15
Climbing Expeditions: Ulvetanna, Wohlthat Massif	12
Total	29

Table 6: WDL Programs and Participant Numbers (clients, staff and guides)

WDL Program	Number of Participants
Emperors and South Pole	11
Emperors and Mountains	9
Total	19

1.8 Air / Land Activities conducted by IAATO Members in the Antarctic Peninsula¹

For the 2012-13 season, IAATO Associate Member Destination Management Chile (DMC), operating through Aerovías DAP (a non-IAATO member), conducted two separate day-trips from Punta Arenas, Chile to King George Island. A total of 61 passengers were escorted to Frei and Bellingshausen Bases and took part in Zodiac rides to Ardley Island in groups of 20 visitors at a time. Eight other planned trips were cancelled due to weather conditions, not meeting the minimum numbers, or other external factors.

1.9 Air Operations – Over-flights operated by IAATO Members

¹ As Aerovías DAP, which is not an IAATO member, was the operator of record for these 61 passengers, they are not included in the overall statistics in the Overview addendum.

For the 2012-13 season, there were no over-flights of Antarctica by IAATO members.

2.0 Preliminary Estimate of Planned Activities for the 2013-14 Season

Appendix 3 illustrates a breakout of tourism categories that are projected for the 2013-14 season. According to estimates provided to IAATO by its member operators (as of May 7, 2013), 23,348 seaborne and yacht passengers are expected to land in Antarctica from commercially organized vessels, 1,588 from combination air-cruise programs, and 498 on air/land expeditions during the 2013-14 season. Another 9,920 are anticipated on cruise-only programs. No over-flights by IAATO operators are expected during the 2013-14 season.

Ship-based tourism is expected to again include the operation of small auxiliary boats, shore landings, kayaking, mountain climbing, running events, SCUBA diving, skiing, snowboarding, camping (including short overnight stays), helicopter operations and use of underwater ROVs.

For the 2013-14 season, those tourism categories where passengers land ashore – traditional small and medium-size expedition ships and yachts, all carrying 500 or fewer passengers – is expected to remain flat, with an expectation of only 43 more visitors (from 23,305 to 23,348). Numbers will also remain virtually unchanged in the air-cruise category: 1,587 for the season just ended compared to the 1,588 estimated for 2013-14.

Cruise-only tourism, aboard 500-plus passenger vessels with no passengers landing ashore, is expected to increase around 9%, from 9,070 to 9,920, although the number of voyages remains the same: seven. Air-land tourism by the three IAATO Members that provide deep field excursions and expeditions is also projected to increase from the 354 visitors transported inland this past season to 498 for the 2013-14 austral summer.

These estimates indicate the potential for a growth in tourism numbers, IAATO members will continue to work together so that operations are conducted in a safe and environmentally responsible manner, and that tourism activities have no more than a minor or transitory impact on the Antarctic environment.

3.0 Tourism Trends

A trends chart showing the change in IAATO operator landed passengers, dating from the 1992-1993 season and including estimates for the 2013-14 season, can be found in Appendix 2 of this overview.

4.0 Tourism Statistics

The following data sheets are being prepared for inclusion in the IAATO website (<http://www.iaato.org>) and can be found as a link “Tourism Statistics” under the category of Tourism Overview:

- Tourists by Nationality (Landed)
- Tourists by Nationality (Air and Cruise)
- Tourists by Nationality (All)
- Tourist Nationalities by Vessel
- Trends 1992-2013
- Number of Visitors (tourists, staff, crew) per site per vessel-All Antarctic Sites
- Number of Visitors (tourists, staff, crew) per Site per Vessel-Continental Sites
- Number of Tourists per Site Per Vessel-All Antarctic Sites
- Number of Tourists per Site per Vessel
- Number of Tourists per Site Per Vessel-Peninsula Sites
- Number of Visits per Site per Activity.

These datasheets will be posted once the statistics have been finalized.

Appendices:

- Appendix 1: Overview of Antarctic Tourism 2012-13

- Appendix 2: Histogram of 1992-2014 Antarctic Tourist Trends – Landed Passengers, including ship and land passenger numbers
- Appendix 3: Preliminary Estimate of Antarctic Tourism 2013-14

Appendix 1: Overview of Antarctic Tourism 2012-13

Based on information provided by IAATO Members to the IAATO Secretariat as of May 7, 2013

IAATO Members Seaborne Tourism – Peninsula Region 2012-13

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
Traditional Vessels							
<i>Akademik Ioffe</i>	Russia	One Ocean Expeditions	Canada	127	7	547	small boat, camping, kayaking
<i>Akademik Ioffe</i>	Russia	Cheesemans' Ecology Safaris	United States	127	1	99	small boat
<i>Akademik Sergey Vavilov</i>	Russia	One Ocean Expeditions	Canada	122	11	972	small boat, , kayaking, camping
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	48	5	160	small boat
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	5	699	small boat
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	7	740	small boat, camping, kayaking, climbing
<i>Sea Adventurer</i>	Bahamas	Zegrahm Expeditions	United States	141	1	106	small boat, kayaking
<i>Corinthian II</i>	Marshall Islands	Travel Dynamics	United States	100	10	989	small boat
<i>Delphin</i>	Bahamas	Passat Kreuzfahrten	Germany	550	3	907	small boat
<i>Expedition</i>	Liberia	G Adventures	Canada	140	12	1584	small boat, camping, kayaking
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	318	11	2053	small boat, camping, kayaking
<i>Hamburg</i>	Nassau	plantours & Partner GmbH	Germany	423	3	905	small boat
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	200	4	631	small boat
<i>L'Austral</i>	France	Compagnie du Ponant	France	264	9	1671	small boat
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	264	4	753	small boat
<i>Le Boreal</i>	France	Compagnie du Ponant	France	264	4	780	small boat
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	150	10	1483	small boat, kayaking, ROV, SCUBA diving
<i>Ocean Diamond</i>	Bahamas	Quark Expeditions	United States	278	12	2051	small boat, camping, climbing, kayaking, skiing
<i>Ocean Nova</i>	Bahamas	Polar Latitudes	United States	98	3	210	small boat , kayaking
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	3	306	small boat, helicopter operations
<i>Ortelius</i>	Cyprus	Cheesemans' Ecology Safaris	United States	120	1	102	small boat
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	114	13	1251	small boat, camping, climbing, kayaking, SCUBA
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	6	303	small boat, camping, climbing, kayaking
<i>Polar Pioneer</i>	Russia	Waterproof Expeditions	Netherlands	56	1	54	small boat, kayaking, SCUBA diving
<i>Sea Spirit</i>	Bahamas	Quark Expeditions	United States	127	11	1079	small boat, camping, climbing, kayaking, skiing
<i>Silver Explorer</i>	Bahamas	Silversea Cruises	United States	132	7	860	small boat
<i>Ushuaia</i>	Comoros	Antarpply Expeditions	Argentina	90	14	1074	small boat
Total					178	22369	

IAATO Members Air/Cruise Tourism – Peninsula Region 2012-13

Air/Cruise	Vessel Registry	Operator / Charterer	Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	4	415	small boat, camping, kayaking
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	98	16	975	small boat, climbing, skiing
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	4	197	small boat, kayaking, SCUBA diving, camping, climbing
Total					24	1587	

IAATO Member Yachts (all regions) 2012-13

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
Yachts							
<i>Australis</i>	Australia	Ocean Expeditions	Australia	9	2	14	small boat, kayaking, SCUBA diving
<i>MY Arctic P</i>	Bahamas	EYOS	United Kingdom	12	1	7	small boat, kayaking
<i>MY Sherakhan</i>	Netherlands	Waterproof	Netherlands	12	1	12	small boat
<i>Erica XII</i>	Cayman Islands	Pelagic Expeditions	United Kingdom	12	1	2	small boat
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	12	3	16	small boat, climbing
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	4	46	small boat
<i>Hans Hansson</i>	United Kingdom	Golden Fleece Expeditions	UK Overseas Territory	12	3	32	small boat
<i>Ice Bird</i>	Cayman Islands	Spirit of Sydney Expeditions	Australia	8	2	19	small boat, kayak, climbing, skiing, camping
<i>Paradise</i>	France	Paradise Adventures	France	9	2	15	small boat, camping, climbing, kayaking, skiing
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	12	2	13	small boat, climbing, kayaking, skiing, camping
<i>Podorange</i>	London, UK	Voile Australe	France	9	3	21	small boat, skiing
<i>Santa Maria Australis</i>	Germany	SIM Expeditions	Chile	9	3	23	small boat
<i>Selma Expeditions</i>	Poland	Selma Expeditions	Poland	8	4	32	small boat
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	7	3	19	small boat, camping, climbing, kayaking, skiing
<i>SuRi</i>	Marshall Islands	Henry Cookson Adventures	United Kingdom	12	2	21	small boat, camping, climbing, helicopter, kayaking, ROV, SCUBA diving, skiing, Submersible
<i>Vaiheré</i>	France	Latitude Océane	Belgium	10	3	28	small boat
<i>Xplore</i>	Panama	Xplore Expeditions	United Kingdom	12	2	8	small boat
Total					41	328	

IAATO Cruise-Only/Peninsula 2012-13

Vessels	Vessel Registry	Operator / Charterer	Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
Cruise Only							
<i>Azamara Quest</i>	Malta	Celebrity/Royal Caribbean	United States	830	1	565	Cruise Only
<i>Celebrity Infinity</i>	Malta	Celebrity/Royal Caribbean	United States	2449	2	4080	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	830	1	689	Cruise Only
<i>Veendam</i>	Netherlands	Holland America	United States	1498	3	3736	Cruise Only
Total					7	9070	

IAATO Members Seaborne Tourism – Continental/Ross Sea 2012-13

Vessels	Vessel Registry	Operator / Charterer	Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<i>Bremen</i>	Bahamas	Hapag Lloyd	Germany	164	1	124	small boat
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	106	3	273	small boat
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	2	113	small boat, helicopter operations
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	58	2	98	small boat
Total					8	608	

IAATO Members Air/Land Tourism 2012-13

Operator	Country	Antarctic Area Visited	Aircraft Used	Actual # Departures	Actual # Passengers	Activities
<i>Adventure Network International / Antarctic Logistics and Expeditions (ALE)</i>	United States	Ellsworth Mts., South Pole	Ilyushin-76, Twin Otter, DC3 Basler	Varies	313	aircraft landing, camping, climbing, marathon, skiing,
<i>The Antarctic Company (TAC)</i>	Varies	Filchner Ice Shelf, South Pole	Ilyushin-76, DC3 Basler	Varies	22	aircraft landing, camping, climbing, hiking, marathon, skiing
<i>White Desert Limited (WDL)</i>	United Kingdom	The Antarctic Company (TAC)	Coordinated through TAC	Varies	19	camping, climbing, skiing
Total					354	

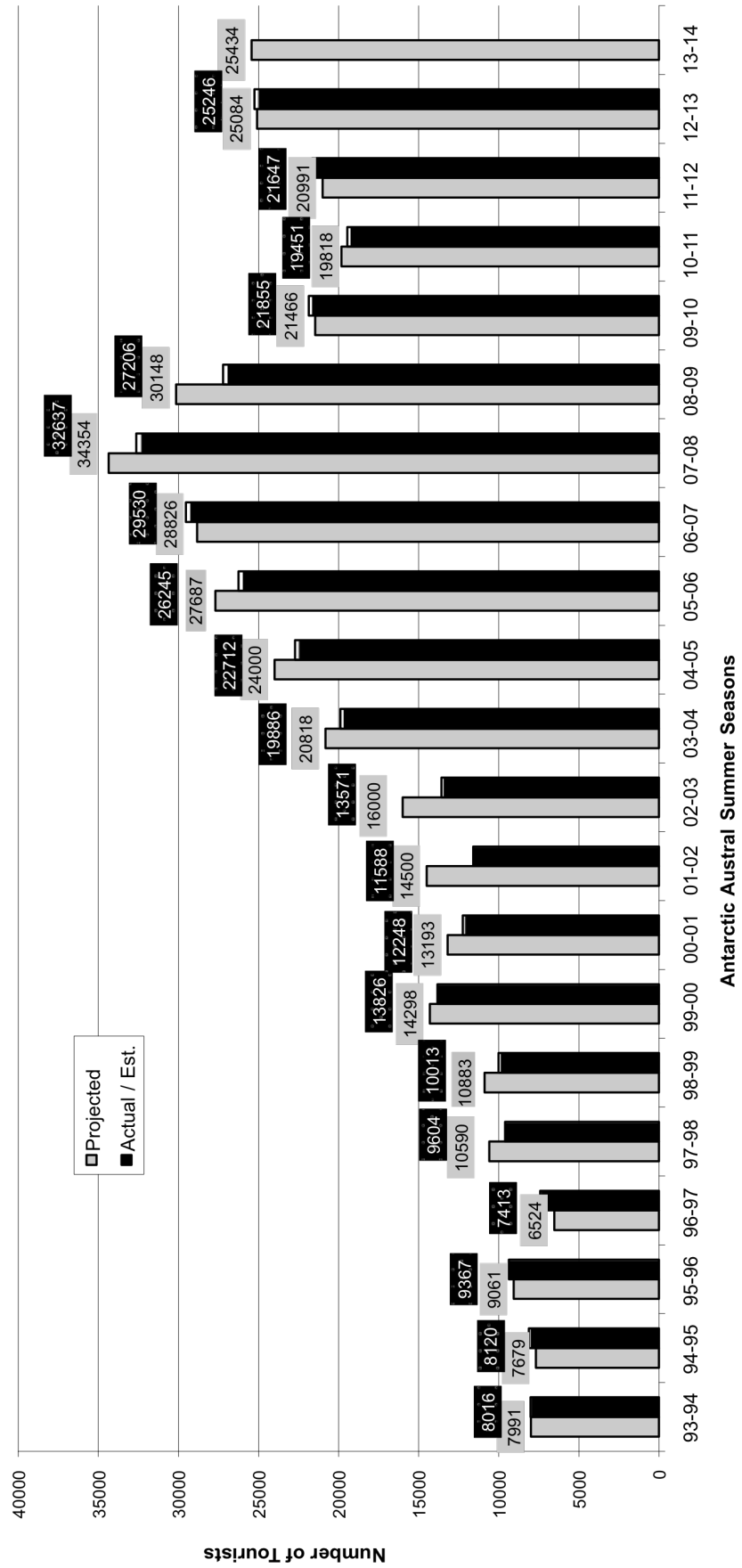
**SUMMARY OF ACTUALS for 2012-13 SEASON
(All Tourist Types)**

Types of Tourism	Number of Vessels	Number of Departures	Total Number of Passengers
IAATO Seaborne Tourism Peninsula	22	178	22,369
IAATO Seaborne Tourism Ross Sea/Continental	4	8	608
IAATO Sailing Vessels/Yachts	17	41	328
IAATO Air/Cruise Peninsula	3	24	1,587
IAATO Cruise-Only/Peninsula	4	7	9,070
IAATO Air/Land Tourism			354
IAATO Member Air/Overflights/Peninsula			0
TOTAL	54	258	34,316

* Total reflects the use of the same vessel in multiple types of tourism; e.g. Landed/Peninsula and Air-Cruise/Peninsula

Total Visitors for 2012-13 Season:	
Seaborne Traditional Tourism (with landings)	23,305
Seaborne Tourism Cruise-Only (no landings)	9,070
Air/Cruise	1,587
Air/Land Tourism	354
Over-flights (no landing)	0
Total	34,316

Appendix 2
 1992-2013 ANTARCTIC TOURIST TRENDS - Landed Passengers
 Includes Ship and Air/Land passenger numbers.
 1997-98 onwards includes some small sailing yachts or motor vessels
 May 6, 2013



Appendix 3: Preliminary Estimate of Antarctic Tourism 2013-2014
Based on information provided by IAATO Members to the IAATO Secretariat as of May 7, 2013

IAATO Members Seaborne Tourism – Peninsula Region 2013-14

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Intended Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Traditional Vessels									
<i>Akademik Ioffe</i>	Russia	One Ocean Expeditions	Canada	127	98	10	55	550	small boat, camping, kayaking
<i>Akademik Sergey Vavilov</i>	Russia	One Ocean Expeditions	Canada	122	92	11	55	605	small boat, camping, climbing, kayaking, skiing
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	48	43	3	38	114	small boat
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	150	2	130	260	small boat
<i>Corinthian</i>	Marshall Islands	Travel Dynamics	United States	100	80	10	80	800	small boat
<i>Delphin</i>	Bahamas	Passat Kreuzfahrten	Germany	550	375	2	320	640	small boat
<i>Expedition</i>	Liberia	G Adventures	Canada	140	130	12	128	1536	small boat, camping, kayaking
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	318	254	10	230	2300	small boat, kayaking
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	200	184	3	150	450	small boat
<i>L'Austral</i>	France	Compagnie Des Iles Du Ponant	France	264	200	9	185	1665	small boat
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	264	200	3	190	570	small boat
<i>Le Boreal</i>	France	Compagnie Des Iles Du Ponant	France	264	200	6	185	1110	small boat
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	150	148	10	140	1400	small boat, kayaking, ROV, SCUBA diving
<i>Ocean Diamond</i>	Bahamas	Quark Expeditions	United States	278	189	11	170	1870	small boat, camping, climbing, kayaking, skiing
<i>Ocean Nova</i>	Bahamas	PolarQuest	Sweden	98	84	1	75	75	small boat
<i>Oosterschelde</i>	Netherlands	Waterproof	Netherlands			3	32	96	small boat
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	104	5	70	350	small boat, helicopter operations
<i>Ortelius</i>	Cyprus	Cheesemans' Ecology Safaris	United States	120	100	1	100	100	small boat
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	114	80	11	80	880	small boat, camping, climbing, kayaking, SCUBA
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	54	4	54	216	small boat, camping, climbing, kayaking,
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	120	6	96	576	small boat, camping, climbing, kayaking
<i>Sea Adventurer</i>	Bahamas	Zegrahm Expeditions	United States	141	122	1	110	110	small boat, kayaking

<i>Seabourn Quest</i>	Bahamas	Seabourn Cruise Line	United States	462	450	4	450	1800	small boat
<i>Sea Explorer</i>	Bahamas	Polar Latitudes	United States	114	114	10	102	1020	Small boat, kayaking,
<i>Sea Spirit</i>	Bahamas	Quark Expeditions	United States	127	114	10	102	1020	Small boat, camping, climbing, kayaking, skiing.
<i>Silver Explorer</i>	Bahamas	Silversea Cruises	United States	132	130	9	120	1080	Small boat, SCUBA diving
<i>Ushuaia</i>	Comoros	Antarpply Expeditions	Argentina	90	84	14	70	980	small boat
<i>Ushuaia</i>	Comoros	Students on Ice	Argentina	90	88	1	70	70	small boat
Total						182		22243	

IAATO Members Air/Cruise Tourism – Peninsula Region 2013-14

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Intended Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	98	67	16	55	880	Small boat,
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	54	6	54	324	Small boat, kayaking, SCUBA diving
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	120	4	96	384	Small boat, camping, kayaking
Total						26		1588	

IAATO Members Yachts (all regions) 2013-14

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Intended Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Yachts									
<i>Australis</i>	Australia	Ocean Expeditions	Australia	9		4	9	36	Small boat, kayaking, SCUBA diving
<i>TBD</i>	Bahamas	EYOS	United Kingdom	12	12	4	8	32	
<i>TBD</i>		High Latitudes	United Kingdom	12	12	2	6	12	
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	12	8	3	6	18	Small boat, climbing
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	12	4	12	48	Small boat
<i>Hans Hansson</i>	United Kingdom	Golden Fleece Expeditions	UK Overseas Territory	12	12	4	12	48	Small boat
<i>Hans Hansson</i>	United Kingdom	Waterproof Expeditions	Netherlands	12	12	1	12	12	Small boat, SCUBA diving
<i>Icebird</i>	Australia	Spirit of Sydney	Australia	7	7	3	7	21	Small boat, kayaking, climbing,

									skiing, camping
<i>Kotick</i>	Antigua	Kotick Charters, Ltd.	France	5	5	1	5	5	Small boat
<i>Paradise</i>	France	Paradise Adventures	France	9	8	2	6	12	Small boat, camping, kayaking, climbing, skiing.
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	6	2	6	12	Small boat, climbing, camping
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	12	10	3	9	27	Small boat, camping, climbing
<i>Podorange</i>	London, UK	Voile Australe	France	9	9	3	8	24	Small boat, skiing
<i>Santa Maria Australis</i>	Germany	Sea and Ice Mountain Expeditions	Chile	10	9	3	8	24	Small boat
<i>Selma</i>	Poland	Selma Expeditions	Poland	10		4	8	32	Small boat
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	7	7	3	7	21	Small boat, camping, climbing, kayaking, skiing
<i>SuRi</i>	Marshall Islands	Henry Cookson Adventures	United Kingdom	12	12	2	12	24	Small boat, camping, climbing, helicopter, kayaking, ROV, SCUBA diving, Submersible, skiing
<i>Vaihéré</i>	France	Latitude Océane	Belgium	10	10	3	10	30	Small boat
<i>Xplore</i>	Panama	Xplore Expeditions	United Kingdom	12	10	2	8	16	Small boat
Total						53		454	

IAATO Members Cruise Only 2013-14

Vessels	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Intended Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Cruise Only									
<i>Celebrity Infinity</i>	Malta	Celebrity/Royal Caribbean	United States	2449	2,449	2	1950	3900	Cruise Only
<i>Crystal Symphony</i>	Nassau	Crystal Cruises	United States	960	900	1	900	900	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	830	775	1	770	770	Cruise Only
<i>Zaandam</i>	Netherlands	Holland America	United States	1805	1627	3	1450	4350	Cruise Only
Total						7		9920	

IAATO Members Seaborne Tourism – Continental/Ross Sea 2013-14

Vessels	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Intended Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Bremen</i>	Bahamas	Hapag Lloyd	Germany	164	150	1	130	130	small boat
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	106	100	3	95	285	small boat
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	80	2	70	140	small boat, helicopter landing
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	58	49	2	48	96	small boat, hovercraft
Total						8		651	

IAATO Members Air/Land Tourism 2013-14

Operator	Country	Antarctic Area Visited	Aircraft Used	Est. # of Departures	Est. # Average Load	Est. # of Passengers	Activities
Adventure Network International/Antarctic Logistics and Expeditions (ALE)	United States	Ellsworth Mts., South Pole	Ilyushin-76, Twin Otter, DC3 Basler	Varies	14	350	aircraft landing, camping, climbing, skiing, running event
The Antarctic Company (TAC)	Varies	Filchner Ice Shelf, South Pole, Queen Maud Land	Ilyushin-76, DC3 Basler	Varies	100	100	aircraft landing, camping, climbing, skiing
White Desert (WDL)	United Kingdom	Schirmacher Oasis, Filchner Ice Shelf, Queen Maud Land	Coordinated through TAC	Varies	48	48	camping, climbing, skiing
Total				27		498	

**SUMMARY OF ESTIMATES for 2013-14 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 Seaborne, Landed/Peninsula	22	182	22,243
IAATO Seaborne, Landed/Ross Sea-Continental	4	8	651
IAATO Sailing Vessels/Yachts	18	53	454
IAATO Air-Cruise/Peninsula	3	26	1,588
IAATO Cruise-Only/Peninsula	4	7	9,920
IAATO Air/Land Tourism		27	498
IAATO Air Over-flights/Peninsula		0	0
TOTAL	51	303	35354

* Total reflects the use of the same vessel in multiple types of tourism; e.g. Landed/Peninsula and Air-Cruise/Peninsula

Total Preliminary Visitor Estimates for 2013-14 Season:	
Seaborne Traditional Tourism (with landings)	23,348
Seaborne Tourism Cruise-Only (no landings)	9,920
Air/Cruise	1,588
Air/Land Tourism	498
Over-flights (no landing)	0
Total	35,354