



Agenda Item: ATCM 11
Presented by: IAATO
Original: English
Submitted: 28/04/2015

IAATO Overview of Antarctic Tourism: 2013-14, 2014-15 Season and Preliminary Estimates for 2015-16 Season

IAATO Overview of Antarctic Tourism: 2013-14, 2014-15 Season and Preliminary Estimates for 2015-16 Season

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

Introduction

As in previous years, IAATO is pleased to provide estimates of Antarctic tourism from IAATO operators for the 2015-16 season and the statistical data from the Post Visit Reports for the just-concluded 2014-15 season. Due to the early timing of ATCM XXXVII in 2014, IAATO was unable to provide the detail of the 2013-14 season; this information is also included here.

These estimates are based on information provided to IAATO by its operators as of April 20, 2015. These numbers reflect only those travelling with IAATO member companies and do not include those individuals taking part in research projects that are being supported by IAATO operators.

Preliminary numbers indicate that the general picture for 2014-15 season (36,702 persons) was similar to that forecast in ATCM XXXVII IP103 *IAATO Preliminary Estimates for 2014-15 Season*, and slightly lower than the final figures for the 2013-14 season (37,405 persons). Forecasts for 2015-16 indicate that the numbers will rise to approximately 40,029 individuals.

1.0 Overview

While this section focuses on the detail of the 2014-15 season's information, detailed information on all completed seasons, including details on activities and landing site use, will be posted on the IAATO website (www.iaato.org) under Guidelines and Resources, Tourism Statistics. Additionally selected site-specific information is also available in ATCM XXXVIII IP85 *Report on IAATO Operator Use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines, 2013-14 and 2014-15 Season*.

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 currently 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.

Final analysis of Post Visit Reports for the 2014-15 season indicates that there was a slight decrease in the overall tourism statistics from the 2013-14 season. Ship borne tourism remains dominant on the Peninsula and 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, snorkeling, skiing, snowboarding, camping (including short overnight stays), running events, helicopter operations and underwater ROVs. 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.

The 2014-15 season however did see the use of 'drones' or Unmanned Aerial Vehicles (UAVs), small remotely operated flight vehicles which can be fitted with cameras for aerial photography. Information on

IAATO policies on UAV flights can be found in ATCM XXXVIII IP88 *IAATO Policies on the use of unmanned aerial vehicles (UAVs) in Antarctica*.

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	No. of operators	No. of ships & yachts	No. of voyages	No. of passengers making landings	No. 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
2013-14	42	51	283	27,374	9,670
2014-15	37	44	268	26,812	9,459
2015-16	40***	47***	306***	30,634***	8,900***

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

*** Based on pre-season estimates not actual statistics

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 both the 2013-14 and 2014-15 season. In both years the majority came from the same 8 different countries (see Table 2).

Table 2: Percentage of Passenger Nationalities

Nationality	Percentage of Total 14/15 Season	Percentage of Total 13/14 Season
United States	34	33
Australia	11	11
United Kingdom	9	8
China	8	9
Germany	8	8
Canada	5	5

France	3	3
Switzerland	3	2
Others	19	21

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

Detailed information of the activities conducted during 2014-15 season are listed in Appendix 2, and anticipated activities for the 2015-16 season can be found in Appendix 3. All activities are permitted or authorized through the Environmental Impact Assessments and Advance Notifications submitted in advance of the season. All activities are planned to have no more than a minor or transitory impact on the Antarctic environment and nearly all activities have been conducted from expedition vessels and yachts for more than a decade.

1.5 Commercial Deep Field Tourism

Four IAATO operators conducted deep field tourism activities during the 2014-15 season:

- Adventure Network International / Antarctic Logistics & Expeditions (ALE) – one of the founding members of IAATO in 1991 – conducted activities for the 29th consecutive season.
- The Antarctic Company (TAC) operated in Antarctica for the 10th consecutive season and 6th as an IAATO operator.
- White Desert (WDL), which operated in Antarctica for the 9th consecutive season and 4th as an IAATO operator. Flights and logistics for WDL are coordinated through TAC.
- Arctic Trucks, which joined IAATO at the end of the 2013-14 season has operated in the Antarctic as a contractor since the 1990's. The 2014-15 season was their 1st season as an authorised operator in their own right.

ALE operated out of Punta Arenas, Chile; TAC and WDL operated out of Cape Town, South Africa. Arctic Trucks supported operations working from both ALE and TAC camps.

The four 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 the field.

1.5.1 Visitor & Staff Numbers

Details of the visitor numbers can be found in the appendices below. Deep field operators usually maintain a higher than requisite client to staff ratio – often in the region of 1 guide to 3 clients. The exception is with solo expeditions, for example on South Pole Ski Expeditions, where the clients are supported remotely through communication protocols, air drops and agreed search and rescue plans etc.

1.5.2 Aircraft Operations

ALE:

- One Ilyushin IL-76 was used to ferry general and hazardous cargo, fuel, staff, guides and passengers from SCCI Punta Arenas to SCGC Runway 18M Union Glacier.
- Two ski-equipped DHC-6 Twin Otter aircraft and one ski-equipped Douglas DC3-PT67 aircraft were used for flights within Antarctica and to provide medical evacuation support throughout the Antarctic season.

TAC:

- One Ilyushin IL-76 was used to support a medical evacuation to Cape Town, South Africa
- One Douglas DC3-PT67 aircraft were used for flights within Antarctica and to provide medical evacuation support throughout the Antarctic season

1.5.3 Ground Transport

- ALE operated a number of tractor traverses, primarily for more efficient transport of fuel and cargo, and to support scientific activities.
- ALE, TAC, WDL and Arctic Trucks all used modified wheel vehicles.

1.5.4 Camps (Primary)

- ALE Union Glacier Camp opened October 17, 2014 and closed February 14, 2015.
- TAC Camp opened November 9, 2014 and closed on February 26, 2015.
- WDL Camp opened November 9, 2014 and closed on January 12, 2015.

1.5.5 Programs and Activities

Activities including the operation of standard programs, the organization and operation of private expeditions, and logistical support of other expeditions for the 2014-15 season, are outlined in the table below. Total numbers participating include clients from all four IAATO deep field operators. Note that some clients participated in multiple programs.

Table 3: Programs and Participant Numbers (clients) for 2014-15 season

Program	No. Participating
Emperor Penguin Colony Visits	64
Deep Field Experiences (Camping, skiing, climbing, etc.)	24
Deep Field Flights (e.g. to Pole of Inaccessibility)	1
South Pole Fly-in	75
South Pole Ski Expedition	13
South Pole Motorised Expedition	7
Last Degree Ski Expedition	42
Antarctic Crossing	2
Vinson Massif	162
Marathon	87

1.6 Air Operations – Over-flights operated by IAATO Members

For the 2014-15 season, there were no over-flights of Antarctica by IAATO members.

2.0 Preliminary Estimate of Planned Activities for the 2015-16 Season

Appendix 3 illustrates a breakout of tourism categories that are projected for the 2015-16 season.

IAATO operators continue to refine the detail of their activity reporting. Ship-based tourism is expected to again include the operation of small auxiliary boats, shore landings, kayaking, mountain climbing, running events, SCUBA diving, snorkelling, skiing, snowboarding, stand-up paddle boarding, camping (including

short overnight stays), helicopter operations, use of Unmanned Aerial Vehicles and underwater remote operated vehicles (ROVs).

For the 2015-16 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 reach 30,634 passengers. The increase is due to two principle factors: an increase in air/cruise tourism which will increase to 2,294 clients; and the introduction to the market of two new vessels *Ocean Endeavour* and *Le Lyrial* both of which anticipate carrying approximately 200 passengers and conducting circa 10 voyages.

Cruise-only tourism, aboard 500-plus passenger vessels with no passengers landing ashore, is projecting a slight decrease to 8,900 passengers. Air-land tourism, which is conducted by the four IAATO Members that provide deep field excursions and expeditions, is projected to reach 531 visitors.

No over-flights by IAATO operators are expected during the 2015-16 season.

IAATO members will continue to work together so that operations are conducted in a safe and environmentally responsible manner, and that tourism activities are planned to 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 2015-16 season, can be found in Appendix 1 of this overview.

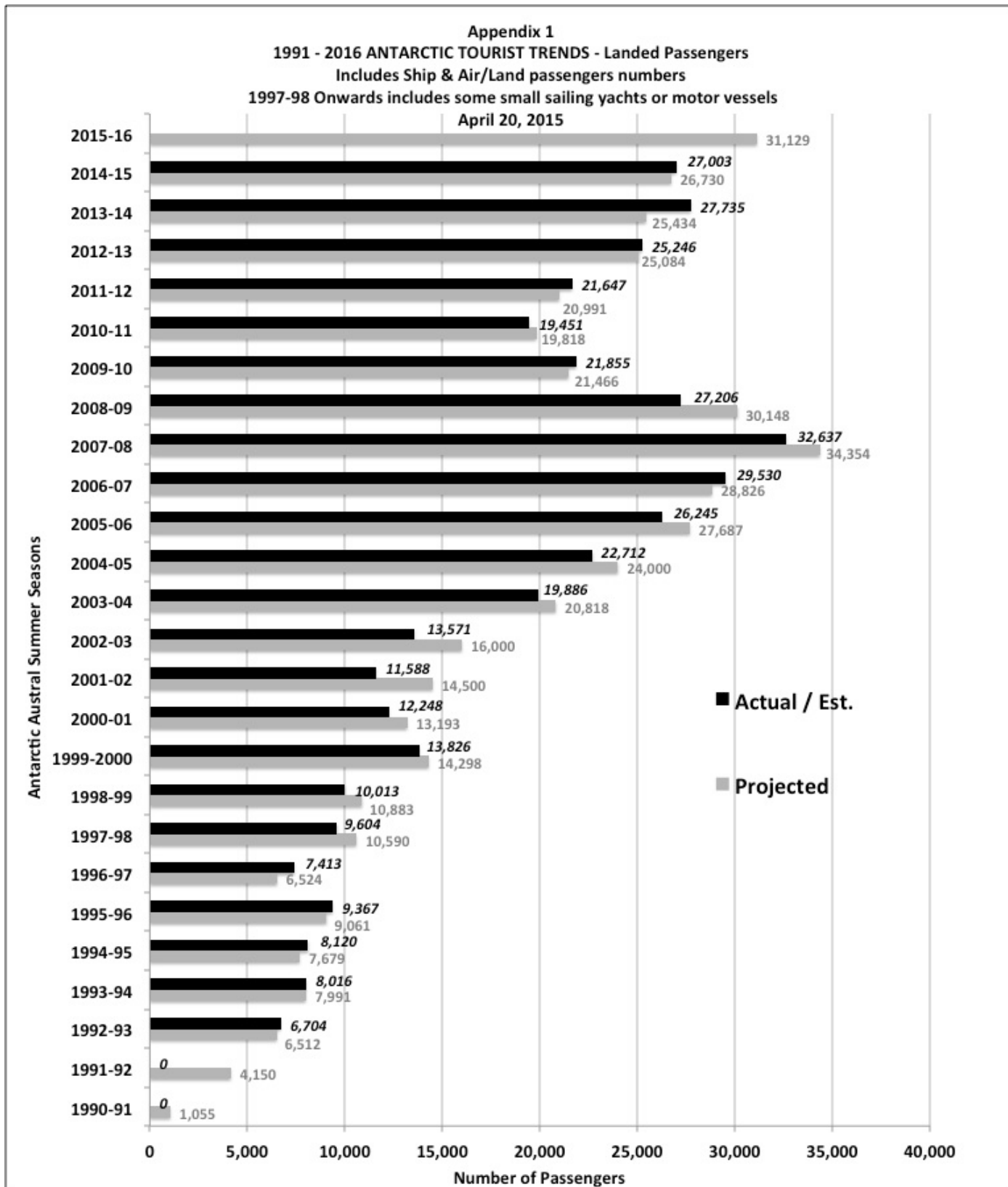
4.0 Tourism Statistics

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 1992-2015
- 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.

Appendices:

- Appendix 1: Histogram of 1991-2016 Antarctic Tourist Trends – Landed Passengers, including ship and land passenger numbers.
- Appendix 2: Overview of Antarctic Tourism 2013-14
- Appendix 3: Overview of Antarctic Tourism 2014-15
- Appendix 4: Preliminary Estimate of Antarctic Tourism 2015-16



Appendix 2: Overview of Antarctic Tourism 2013-14

Based on Information provided by IAATO Members to the IAATO Secretariat as of 30 June 2014

IAATO Members Seaborne Tourism – Peninsula Region – 2013-2014							
Vessels	Vessel Registry	Operator/Charterer	Country	PSSC Passenger Capacity	Actual # Voyages	Actual # of Passengers	Activities incl. landings
<i>Akademik Ioffe</i>	Russia	One Ocean Expeditions	Canada	127	10	904	small boat activities, camping, kayaking
<i>Akademik Sergey Vavilov</i>	Russia	One Ocean Expeditions	Canada	122	10	900	small boat activities, camping, kayaking
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	48	3	91	small boat activities
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	4	500	small boat activities
<i>Corinthian</i>	Marshall Islands	Travel Dynamics	United States	100	10	905	small boat activities
<i>Delphin</i>	Bahamas	Passat Kreuzfahrten	Germany	550	2	712	small boat activities
<i>Expedition</i>	Liberia	G Adventures	Canada	140	13	1689	small boat activities, camping, kayaking
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	318	10	2183	small boat, camping
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	200	3	325	small boat activities
<i>L'Austral</i>	France	Compagnie Des Iles Du Ponant	France	264	9	1709	small boat activities
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	264	3	572	small boat activities
<i>Le Boreal</i>	France	Compagnie Des Iles Du Ponant	France	264	6	1088	small boat activities
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	150	10	1509	small boat activities, kayaking, ROV, SCUBA diving
<i>Ocean Diamond</i>	Bahamas	Quark Expeditions	United States	278	13	2279	small boat activities, camping, kayaking
<i>Ocean Nova</i>	Bahamas	PolarQuest	Sweden	98	1	75	small boat activities
<i>Oosterschelde</i>	Netherlands	Waterproof	Netherlands	24	2	42	small boat activities, SCUBA diving
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	10	963	small boat activities
<i>Ortelius</i>	Cyprus	Cheesemans' Ecology Safaris	United States	120	1	97	small boat activities
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	114	12	1183	small boat activities, camping, climbing, kayaking, SCUBA
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	7	349	small boat activities, camping, climbing, kayaking, SCUBA
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	6	650	small boat activities, skiing
<i>Sea Adventurer</i>	Bahamas	Zegrahm Expeditions	United States	141	1	91	small boat activities
<i>Seabourn Quest</i>	Bahamas	Seabourn Cruise Line	United States	462	4	1721	small boat activities
<i>Sea Explorer</i>	Bahamas	Polar Latitudes	United States	114	10	923	small boat activities

IAATO Members Seaborne Tourism – Peninsula Region – 2013-2014 cont.							
Vessels	Vessel Registry	Operator/Charterer	Country	PSSC Passenger Capacity	Actual # Voyages	Actual # of Passengers	Activities incl. landings
<i>Sea Spirit</i>	Bahamas	Quark Expeditions	United States	127	11	1115	small boat activities
<i>Silver Explorer</i>	Bahamas	Silversea Cruises	United States	132	9	1090	small boat activities
<i>Ushuaia</i>	Comoros	Antarpply Expeditions	Argentina	90	12	922	small boat activities
<i>Ushuaia</i>	Comoros	Students on Ice	Argentina	90	1	72	small boat activities
Total					193	24659	

IAATO Members Air Cruise Tourism – Peninsula Region – 2013-2014							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	98	19	1225	small boat activities
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	4	207	small boat activities, kayaking
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	4	416	small boat activities
Total					27	1848	

IAATO Members Yacht Tourism – Peninsula Region – 2013-2014							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Australis</i>	Australia	Ocean Expeditions	Australia	1	2	7	small boat activities, kayaking, camping, suba diving, climbing, science
<i>Asteria</i>	Bahamas	EYOS	United Kingdom	12	3	33	small boat activities
<i>Endurance of Antarctica</i>	United Kingdom	Pelagic Expeditions	United Kingdom		1	2	small boat activities
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	12	1	7	small boat activities
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	4	42	small boat activities, kayaking
<i>Hans Hansson</i>	United Kingdom	Golden Fleece Expeditions	UK Overseas Territory	12	3	23	small boat activities
<i>Hans Hansson</i>	United Kingdom	Waterproof Expeditions	Netherlands	12	1	6	small boat activities
<i>Icebird</i>	Australia	Spirit of Sydney	Australia	7	3	17	small boat activities
<i>Kotick</i>	Antigua	Kotick Charters, Ltd.	France	5	1	5	small boat activities

IAATO Members Yacht Tourism – Peninsula Region – 2013-2014 cont.							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Lord Nelson</i>	United Kingdom	Pelagic Expeditions	United Kingdom	40	1	35	small boat activities
<i>Louise</i>	United Kingdom	High Latitudes	United Kingdom		1	4	small boat activities
<i>Paradise</i>	France	Paradise Adventures	France	9	2	11	small boat activities, camping, skiing
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	3	11	small boat activities
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	12	3	24	small boat activities, climbing, kayaking
<i>Podorange</i>	London, UK	Voile Australe	France	9	3	22	small boat activities
<i>Santa Maria Australis</i>	Germany	Sea and Ice Mountain Expeditions	Chile	10	3	19	small boat activities, climbing, kayaking
<i>Selma</i>	Poland	Selma Expeditions	Poland	10	5	37	small boat activities
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	7	3	20	small boat activities, camping, climbing, kayaking, skiing
<i>Vaiheré</i>	France	Latitude Océane	Belgium	10	3	25	small boat activities
<i>Xplore</i>	Panama	Xplore Expeditions	United Kingdom	12	3	18	small boat activities
Total					49	368	

IAATO Members Cruise Only Tourism – Peninsula Region – 2013-2014							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Celebrity Infinity</i>	Malta	Celebrity/Royal Caribbean	United States	2449	2	4126	Cruise Only
<i>Crystal Symphony</i>	Nassau	Crystal Cruises	United States	960	1	831	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	830	1	651	Cruise Only
<i>Zaandam</i>	Netherlands	Holland America	United States	1805	3	4062	Cruise Only
Total					7	9670	

IAATO Members Seaborne Tourism – Continental/Ross Sea - 2013-2014							
Vessels	Vessel Registry	Operator/Charterer	Country	PSSC Passenger Capacity	Actual # Voyages	Actual # of Passengers	Activities incl. landings
<i>Akademik Shokalskiy</i>		Heritage Expeditions	New Zealand	58	1	46	small boat activities
<i>Arctic P</i>		EYOS Expeditions	United Kingdom	12	1	10	small boat activities, kayaking
<i>Hanseatic</i>	Bahamas	Hapag Lloyd	Germany	200	1	140	small boat activities
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	106	2	203	small boat activities
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	58	2	100	small boat activities, hovercraft
Total					7	499	

IAATO Members Deep Field Tourism - 2013-2014							
Operator	Country	Antarctic Area Visited	Aircraft Used		Actual # Average Load	Actual # of Passengers	Activities
<i>Adventure Network International/Antarctic Logistics and Expeditions (ALE)</i>	United States	Ellsworth Mountains, West Antarctic Ice Shelf, South Pole	Ilyushin-76, Twin Otter, DC3 Basler		14	270	aircraft landing, camping, climbing, skiing
<i>The Antarctic Company (TAC)</i>	Varies	Droning Maud Land, Filchner Ice Shelf, South Pole	Ilyushin-76, DC3 Basler		100	65	aircraft landing, camping, climbing, skiing, kiting
<i>White Desert (WDL)</i>		Droning Maud Land, Filchner Ice Shelf, South Pole	Coordinated through TAC		38	26	aircraft landing, camping, climbing, skiing, kiting
Total						361	

SUMMARY OF ACTUALS for 2013-2014 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
<i>IAATO Seaborne Tourism Peninsula</i>	22	193	24,659
<i>IAATO Seaborne Tourism Ross Sea/Continental</i>	5	7	499
<i>IAATO Sailing Vessels/Yachts</i>	20	49	368
<i>IAATO Air/Cruise Peninsula</i>	3	27	1,848
<i>IAATO Large Ships Cruise-Only/Peninsula</i>	4	7	9,670
<i>IAATO Deep Field Tourism</i>			361
Total		283	37405

Appendix 3: Overview of Antarctic Tourism 2014-15

Based on information provided by IAATO Members to the IAATO Secretariat as of April 20, 2015

IAATO Members Seaborne Tourism – Peninsula Region – 2014-2015							
Vessels	Vessel Registry	Operator/Charterer	Country	PSSC Passenger Capacity	Actual # Voyages	Actual # of Passengers	Activities incl. landings
<i>Akademik Ioffe</i>	Russia	One Ocean Expeditions	Canada	127	10	1034	ski mountaineering, snowshoeing, camping, kayaking, overnight kayak trip, small boat cruising, small boat landing, station visits, photography, extended walks,, marathon
<i>Akademik Sergey Vavilov</i>	Russia	One Ocean Expeditions	Canada	122	11	897	kayaking, snowshoeing, small boat cruising, small boat landing, station visits,
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	48	5	177	small boat landing, ship cruise
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	6	826	small boat landing, small boat cruising, ship cruising
<i>Corinthian</i>	Marshall Islands	Grand Circle Corporation	United States	110	7	630	small boat landings
<i>Expedition</i>	Liberia	G Adventures	Canada	140	10	1283	small boat landing, small boat cruising, camping, kayaking, ship cruising
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	318	9	1887	Small boat landing, hiking, kayaking, snowshoeing, small boat cruising, ship cruising, logistic support, camping
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	200	6	895	Small boat landing, small boat cruising, ship cruising
<i>Le Soleal</i>	France	Ponant	France	264	10	1954	ship cruise, small boat landing, small boat cruising, walks, ice landing, Station visit
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	264	4	773	small boat landing, station visit
<i>Le Boreal</i>	France	Ponant	France	264	5	920	ship cruise, small boat landing, small boat cruising, walks, ice landing, Station visit
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	150	10	1490	Ship cruising, small boat cruising, hiking, kayaking, ROV ops, diving - staff only

IAATO Members Seaborne Tourism – Peninsula Region – 2014-2015 cont.							
Vessels	Vessel Registry	Operator/Charterer	Country	PSSC Passenger Capacity	Actual # Voyages	Actual # of Passengers	Activities incl. landings
<i>National Geographic Orion</i>	Bahamas	Lindblad Expeditions	United States	102	4	404	small boat cruising, small boat landing, kayaking, ROV
<i>Ocean Diamond</i>	Bahamas	Quark Expeditions	United States	278	11	1928	small boat landing, small boat cruising, kayaking, camping, climbing, skiing
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	98	3	210	small boat landing, small boat cruising, kayaking, snowshoeing
<i>Ocean Nova</i>	Bahamas	Grands Espaces	France	98	1	57	small boat landing
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	5	484	small boat landing, camping, diving, helicopter ops, hiking
<i>Ortelius</i>	Cyprus	Cheesemans' Ecology Safaris	United States	120	1	96	small boat cruising, small boat landing, extended walks
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	116	13	1399	small boat landing, camping, diving, hiking, kayaking, mountaineering
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	8	412	Small boat cruising, small boat landing, station visit, SCUBA diving, snorkeling, kayaking climbing
<i>Sea Adventurer</i>	Bahamas	Fathom Expeditions	Canada	141	6	115	small boat cruising, small boat landing, hiking, skiing
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	8	796	small boat cruising, small boat landing, kayaking, camping
<i>Seabourn Quest</i>	Bahamas	Seabourn Cruise Line	United States	462	4	1725	small boat landings
<i>Sea Explorer</i>	Bahamas	Polar Latitudes	United States	114	11	1115	small boat landing, small boat cruising, ship cruising, kayaking, camping, UAV flight
<i>Sea Spirit</i>	Bahamas	Quark Expeditions	United States	127	9	941	small boat landing, small boat cruising, kayaking, camping
<i>Sea Spirit</i>	Bahamas	Zegrahm Expeditions	United States	127	2	163	small boat cruising, small boat landing, kayaking
<i>Silver Explorer</i>	Bahamas	Silversea Cruises	United States	132	9	1051	small boat landings, small boat cruising
<i>Ushuaia</i>	Comoros	Antarpply Expeditions	Argentina	90	13	1100	small boat landing, small boat cruising
<i>Ushuaia</i>	Comoros	Students on Ice	Canada	90	1	79	Small boat landing, small boat cruising
Total					202	24841	

IAATO Members Air Cruise Tourism – Peninsula Region – 2014-2015							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Australis</i>	Australia	Ocean Expeditions	Australia	12	2	13	Film support, Science support, Kayaking, Zodiac cruising, Mountaineering, Camping, Diving
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	3	24	Small boat landing
<i>Hans Hansson</i>	United Kingdom	Grands Espaces	UK Overseas Territory	12	1	12	Film support, tourist landing, zodiac cruise
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	98	12	764	small boat landing, small boat cruising, kayaking, snowshoeing
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	2	108	Small boat cruising, small boat landing, station visit, SCUBA diving, snorkeling, kayaking climbing
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	4	550	small boat cruising, small boat landing, kayaking, camping
Total					24	1471	

IAATO Members Yacht Tourism – Peninsula Region – 2014-2015							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Anne-Margaretha</i>	Netherlands	Anne-Margaretha Charters	Netherlands	12	3	21	Small boat landing
<i>Australis</i>	Australia	Ocean Expeditions	Australia	12	2	15	Film support, Science support, Kayaking, Zodiac cruising, Mountaineering, Camping, Diving
<i>Drumbeat</i>	Cayman Islands	Pelagic Expeditions	British Virgin Islands	12	1	8	Small boat landing
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	12	1	7	small boat landing
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	1	14	small boat landings, small boat cruises, kayaking, camping, ice diving
<i>Icebird</i>	Australia	Spirit of Sydney	Australia	7	4	23	Small boat landing
<i>Paradise</i>	France	Paradise Adventures	France	8	2	13	small boat landing, skiing, extended walks
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	12	3	19	ship cruise, small boat landing
<i>Podorange</i>	London, UK	Voile Australe	France	9	3	21	small boat landing, skiing
IAATO Members Yacht Tourism – Peninsula Region – 2014-2015 cont.							

Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Pumula</i>	Cayman Islands	Pelagic	United Kingdom	8	1	4	ship cruise, small boat landing
<i>Santa Maria Australis</i>	Germany	Sea and Ice Mountain Expeditions	Chile	10	3	26	Small boat landing
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	7	3	18	Small boat landing
<i>Vaiheré</i>	France	Latitude Océane	Belgium	16	3	28	Small boat landing
Total					30	217	

IAATO Members Cruise Only Tourism – Peninsula Region – 2014-2015							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Azamara Journey</i>	Malta	Azamara/Celebrity/RCCL	United States	1200	1	641	Cruise Only
<i>Celebrity Infinity</i>	Malta	Azamara/Celebrity/RCCL	United States	2449	2	4142	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	830	1	699	Cruise Only
<i>Zaandam</i>	Netherlands	Holland America	United States	1805	3	3977	Cruise Only
Total					7	9459	

IAATO Members Seaborne Tourism – Continental/Ross Sea - 2014-2015							
Vessels	Vessel Registry	Operator/Charterer	Country	PSSC Passenger Capacity	Actual # Voyages	Actual # of Passengers	Activities incl. landings
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	2	177	small boat landing, camping, diving helicopter ops, hiking
<i>Selma</i>	Poland	Selma Expeditions	Poland	8	1	8	Small boat landing, climbing
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	58	2	98	Small boat landing
Total					5	283	

IAATO Members Deep Field Tourism - 2014-2015							
Operator	Country	Antarctic Area Visited	Aircraft Used		Actual # Average Load	Actual # of Passengers	Activities
<i>Adventure Network International/Antarctic Logistics and Expeditions (ALE)</i>	United States	Ellsworth Mountains, West Antarctic Ice Shelf, South Pole	Ilyushin-76, Twin Otter, DC3 Basler			368	aircraft landing, science support, camping, climbing, skiing, kiting
<i>Arctic Trucks</i>	United Kingdom	Novo to South Pole				7	Traverse, logistic support, science support,
<i>The Antarctic Company (TAC)</i>	Varies	Droning Maud Land, Filchner Ice Shelf, South Pole	Ilyushin-76, DC3 Basler			27	aircraft landing, camping, climbing, skiing, kiting
<i>White Desert (WDL)</i>		Droning Maud Land, Filchner Ice Shelf, South Pole	Coordinated through TAC			29	aircraft landing,
Total						431	

SUMMARY OF ESTIMATES for 2014-2015 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
<i>IAATO Traditional Seaborne Tourism Peninsula</i>	23	202	24,841
<i>IAATO Seaborne Tourism Ross Sea/Continental</i>	3	5	283
<i>IAATO Sailing Vessels/Yachts</i>	13	30	217
<i>IAATO Air/Cruise Peninsula</i>	6	24	1,471
<i>IAATO Large Ships Cruise-Only/Peninsula</i>	4	7	9,459
<i>IAATO Deep Field Tourism</i>			431
Total		268	36702

Appendix 4: Preliminary Estimate of Antarctic Tourism 2015-16

Based on information provided by IAATO Members to the IAATO Secretariat as of April 20, 2015

IAATO Members Traditional Seaborne Tourism – Peninsula Region – 2015-2016							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Akademik Ioffe</i>	Russia	One Ocean Expeditions	Canada	11	55	605	Kayaking, ski touring, camping, overnight sea kayak camping, snowshoeing, zodiac cruising, small boat landing, station visits, hiking, painting, ship cruising, science support
<i>Akademik Sergey Vavilov</i>	Russia	One Ocean Expeditions	Canada	5	53	265	Kayaking, ski touring, camping, overnight sea kayak camping, snowshoeing, zodiac cruising, small boat landing, station visits, hiking, painting, ship cruising, science support
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	4	34	136	small boat landing, ship cruise
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	5	130	650	small boat landing, small boat cruising
<i>Corinthian</i>	Marshall Islands	Grand Circle Corporation	United States	8	88	704	small boat landing, small boat cruising
<i>Expedition</i>	Liberia	G Adventures	Canada	12	125	1500	small boat landing, small boat cruising, camping, kayaking, ship cruising
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	9	230	2070	Small boat landing, hiking, kayaking, snowshoeing, small boat cruising, ship cruising, logistic support, camping
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	6	140	840	small boat landing
<i>L'Austral</i>	France	Ponant	France	9	180	1620	Small boat landing, Small Boat cruising, ship cruising, Walking/hiking, station visit, ice floe landing, diving (only for dedicated staff),
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	4	190	760	small boat landing
<i>Le Boreal</i>	France	Ponant	France	5	180	900	Small boat landing, Small Boat cruising, ship cruising, Walking/hiking, station visit, , diving (only for dedicated staff).

IAATO Members Traditional Seaborne Tourism – Peninsula Region – 2015-2016 cont.							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Le Lyrial</i>	France	Ponant	France	10	180	1800	Small boat landing, Small Boat cruising, ship cruising, Walking/hiking, station visit, diving (only for dedicated staff),
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	10	145	1450	small boat landing, small boat cruises, kayaking, scuba, ROV
<i>National Geographic Orion</i>	Bahamas	Lindblad Expeditions	United States	7	100	700	small boat landing, small boat cruises, kayaking, scuba, ROV
<i>Ocean Diamond</i>	Bahamas	Quark Expeditions	United States	13	150	1950	small boat landing, small boat cruising, kayaking, camping, snow shoeing
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	3	55	165	small boar landing, kayaking, snowshoeing
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	11	89	979	small boat cruising, small boat landing, camping, hiking, kayaking, mountaineering, SCUBA, helicopter landings
<i>Ortelius</i>	Cyprus	Cheesemans' Ecology Safaris	United States	1	100	100	small boat cruising, small boat landing, science support
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	11	89	979	small boat cruising, small boat landing, camping, hiking, kayaking, mountaineering, SCUBA
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	8	54	432	kayaking, camping, climbing, polar snorkeling, polar diving, snow shoeing
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	10	93	930	small boat cruising, small boat landing, kayaking, camping, show shoeing, skiing
<i>Sea Adventurer</i>	Bahamas	Zegrahm Expeditions	United States	1	98	98	small boat landing, small boat cruising, kayaking
<i>Seabourn Quest</i>	Bahamas	Seabourn Cruise Line	United States	4	450	1800	small boat landing
<i>Sea Explorer</i>	Bahamas	Polar Latitudes	United States	9	112	1008	camping, climbing, kayaking, skiing, small boat landing, small boat cruising
<i>Sea Spirit</i>		Poseidon Expeditions		10	80	800	hiking, kayaking, camping, small boat landings, small boat cruising
<i>Ocean Endeavour</i>	Marshall Islands	Quark Expeditions	United States	12	160	1920	small boat landing, small boat cruising, kayaking, camping, snow shoeing, skiing, mountaineering, stand-up paddle boarding

IAATO Members Traditional Seaborne Tourism – Peninsula Region – 2015-2016 cont.

Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Silver Explorer</i>	Bahamas	Silversea Cruises	United States	8	123	984	small boat landings, small boat cruising
<i>The World</i>	Bahamas	Residensea	United Kingdom	2	300	600	small boat cruises, small boat landings, kayaking
<i>Ushuaia</i>	Comoros	Antarply Expeditions	Argentina	15	75	1125	small boat landing, zodiac cruises
Total				223		27870	

IAATO Members Air Cruise Tourism – Peninsula Region – 2015-2016							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Akademik Sergey Vavilov</i>	Russia	One Ocean Expeditions	Canada	6	53	318	Kayaking, ski touring, camping, overnight sea kayak camping, snowshoeing, small boat landing, station visits, hiking, painting, ship cruising
<i>Australis</i>	Australia	Ocean Expeditions	Australia	4	9	36	kayaking, camping, small boat landing, skiing, SCUBA, filming, science support.
<i>Enigma XK</i>	Bahamas	EYOS	United Kingdom	2	12	24	small boat landing, kayaking, camping (TBC)
<i>TBC</i>		EYOS	United Kingdom	2	12	24	small boat landing, kayaking, camping SCUBA (TBC)
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	6	12	72	kayaking, small boat landing SCUBA diving, camping
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	16	55	880	small boat landing, kayaking, snowshoeing
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	2	54	108	kayaking, camping, climbing, polar snorkeling, polar diving, snow shoeing
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	4	93	372	small boat cruising, small boat landing, kayaking, camping, snow shoeing, skiing
<i>Sea Explorer</i>	Bahamas	Polar Latitudes	United States	4	112	448	camping, climbing, kayaking, skiing, small boat landing, small boat cruising
<i>TBC</i>		Henry Cookson	United Kingdom	1	12	12	Kayaking, trekking, skiing helicopter flights, small boat cruising, camping on the ice, diving
Total				47		2294	

IAATO Members Yacht Tourism – Peninsula Region – 2015-2016							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Australis</i>	Australia	Ocean Expeditions	Australia	1	9	9	kayaking, camping, small boat landing, skiing, SCUBA, film support science support.
<i>Enigma XK</i>	Bahamas	EYOS	United Kingdom	1	8	8	Small boat landing, kayaking, camping (TBC)
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	2	7	14	Small boat landings
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	6	12	72	small boat landings, kayaking, camping, SCUBA
<i>Hans Hansson</i>	United Kingdom	Golden Fleece Expeditions	UK Overseas Territory	2	8	16	Small boat landings, film support,
<i>Icebird</i>	Australia	Spirit of Sydney	Australia	3	7	21	camping, kayaking, skiing, small boat landing
<i>TBD</i>	United Kingdom	High Latitudes	United Kingdom	1	6	6	Small boat landings
<i>Kotick</i>	Antigua	Kotick Charters	France	2	5	10	SCUBA, small boat landing
<i>Paradise</i>	France	Paradise Adventures	France	2	7	14	Small boat landings
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	1	6	6	kayaking, small boat landing
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	3	8	24	camping, climbing, kayaking, small boat landing
<i>Podorange</i>	London, UK	Voile Australe	France	2	8	16	Small boat landing
<i>Santa Maria Australis</i>	Germany	Sea and Ice Mountain Expeditions	Chile	2	7	14	small boat landing, ship cruise, extended walk
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	2	7	14	camping, kayaking, skiing, small boat landing
<i>Vaiheré</i>	France	Latitude Océane	Belgium	2	10	20	Small boat landing
<i>Xplore</i>	Panama	Xplore Expeditions	United Kingdom	3	6	18	small boat landings, camping, mountaineering, skiing, science, tourism, diving
Total				35		282	

IAATO Cruise Only Tourism - Peninsula - 2015-2016							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Celebrity Infinity</i>	Malta	Azamara/Celebrity/RCCL	United States	1	2000	2000	Cruise Only
<i>Crystal Symphony</i>	Nassau	Crystal Cruises	United States	2	900	1800	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	1	750	750	Cruise Only
<i>Zaandam</i>	Netherlands	Holland America	United States	3	1450	4350	Cruise Only
Total				7		8900	

IAATO Members Seaborne Tourism – Continental/Ross Sea - 2015-2016							
Vessels	Vessel Registry	Operator/Charterer	Country	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Akademik Shokalskiy</i>	Russia	Heritage Expeditions	Australia	2	47	94	small boat landing
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	2	47	94	small boat landing
Total				4		188	

IAATO Members Deep Field Tourism - 2015-2016						
Operator	Country	Antarctic Area Visited	Aircraft Used	Est. # Average Load	Est. # of Passengers	Activities
<i>Adventure Network International/Antarctic Logistics and Expeditions (ALE)</i>	United States	Ellsworth Mountains, West Antarctic Ice Shelf, South Pole	Ilyushin-76, Twin Otter, DC3 Basler		375	aircraft landing, camping, climbing, skiing, kiting, science support
<i>Arctic Trucks</i>	United Kingdom	Novo to South Pole			16	Traverse, logistic support, science support
<i>The Antarctic Company (TAC)</i>	Varies	Droning Maud Land, Filchner Ice Shelf, South Pole	Ilyushin-76, DC3 Basler		80	aircraft landing, camping, climbing, skiing, kiting
<i>White Desert (WDL)</i>	United Kingdom	Droning Maud Land, Filchner Ice Shelf, South Pole	Coordinated through TAC		60	aircraft landing, camping.
Total					531	

SUMMARY OF ESTIMATES for 2015-2016 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
<i>IAATO Traditional Seaborne Tourism Peninsula</i>	26	223	27,870
<i>IAATO Seaborne Tourism Ross Sea/Continental</i>	2	4	188
<i>IAATO Sailing Vessels/Yachts</i>	16	35	282
<i>IAATO Air/Cruise Peninsula</i>	10	47	2,294
<i>IAATO Large Ships Cruise-Only/Peninsula</i>	4	7	8,900
<i>IAATO Deep Field Tourism</i>			531
Total		316	40065