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

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

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

Introduction

IAATO is pleased to provide estimates of Antarctic tourism from IAATO operators for the 2014-15 season and the statistical data from the Post Visit Reports for the just-concluded 2013-2014 season. Preliminary numbers indicate that the general picture is similar to that forecast in ATCM XXXVI IP103 *IAATO Overview of Antarctic Tourism 2012-13 Antarctic Season and Preliminary Estimates for 2013-14 Season*.

The detailed 2013-14 season information, including details on landing site use will be available is posted on the IAATO website (www.iaato.org) under Guidelines and Resources, Tourism Statistics. Where possible, a general indication of information is given in this paper.

Details on anticipated tourism statistics for 2014-15 season can be found in Appendix 3 of this paper. These estimates are based on information provided to IAATO by its operators as of March 17, 2014 at which time we estimated a total of 36,320 tourists for the upcoming season. These numbers reflect only those travelling with IAATO member companies.

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.

Final analysis of post visit reports for the 2013-14 season indicates that there will not be a significant difference in the tourism statistics from the 2012-13 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 2013-14 season however did see the use of overhead 'drones' or quadcopters, small remotely operated flight vehicles which can be fitted with cameras for aerial photography. Operators developed guidelines for this new activity, and these guidelines were tabled at IAATO25.

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
2013-14	42*	54*	283*	27,374	9,670
2014-15	41***	48***	273***	26,420 ***	9,720***

* 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.

*** 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 the 2013-14 season. The majority (79.3 percent) came from 8 different countries (see Table 2).

Table 2: Percentage of Passenger Nationalities (as of June 30, 2014)

Nationality	Percentage of Total
United States	33.2
Australia	11.0
China	8.9
United Kingdom	8.1
Germany	7.7
Canada	5.4
France	2.7
Switzerland	2.3
Others	20.7

1.4 Commercial Tour Vessels Operating in 2013-14

Below is a table detailing the SOLAS vessels used by IAATO Operators during the 2013-14 season.

Vessels	Vessel Registry	Country	Passenger Capacity
Peninsula 2013-14			
<i>Akademik Ioffe</i>	Russia	Canada	127
<i>Akademik Sergey Vavilov</i>	Russia	Canada	122
<i>Bark Europa</i>	Netherlands	Netherlands	48
<i>Bremen</i>	Bahamas	Germany	164
<i>Corinthian</i>	Marshall Islands	United States	100
<i>Delphin</i>	Bahamas	Germany	550
<i>Expedition</i>	Liberia	Canada	140
<i>Fram</i>	Norway	Norway	318
<i>Hanseatic</i>	Bahamas	Germany	200
<i>L'Austral</i>	France	France	264
<i>Le Boreal</i>	France	France	264
<i>Lord Nelson</i>	United Kingdom	United Kingdom	40
<i>National Geographic Explorer</i>	Bahamas	United States	150
<i>Ocean Diamond</i>	Bahamas	United States	278
<i>Ocean Nova</i>	Bahamas	Sweden	98
<i>Oosterschelde</i>	Netherlands	Netherlands	24
<i>Ortelius</i>	Cyprus	United States	120
<i>Plancius</i>	Netherlands	Netherlands	114
<i>Polar Pioneer</i>	Russia	Australia	56
<i>Sea Adventurer</i>	Bahamas	United States	141
<i>Seabourn Quest</i>	Bahamas	United States	462
<i>Sea Explorer</i>	Bahamas	United States	114
<i>Sea Spirit</i>	Bahamas	United States	127
<i>Silver Explorer</i>	Bahamas	United States	132
<i>Ushuaia</i>	Comoros	Argentina	90
<i>*Celebrity Infinity</i>	Malta	United States	2449
<i>*Crystal Symphony</i>	Nassau	United States	960
<i>*Prinsendam</i>	Netherlands	United States	830
<i>*Zaandam</i>	Netherlands	United States	1805
Continental/Ross Sea - 2013-2014			
<i>Akademik Shokalskiy</i>	Russia	New Zealand	58
<i>Arctic P</i>	United Kingdom	United Kingdom	12
<i>Hanseatic</i>	Bahamas	Germany	200
<i>Orion</i>	Bahamas	Australia	106
<i>Spirit of Enderby</i>	Russia	New Zealand	58

*Cruise Only

1.5 Yacht (Sailing and Motor) Activities

Sailing Vessels/Yachts	Registry	Permitting Authority	Passenger Capacity
<i>Australis</i>	Australia	Australia	12
<i>Asteria</i>	Bahamas	United Kingdom	12
<i>Endurance of Antarctica</i>	United Kingdom	United Kingdom	8
<i>Golden Fleece</i>	UK Overseas Territory	United Kingdom	12
<i>Hanse Explorer</i>	Antigua	Germany	12
<i>Hans Hansson</i>	United Kingdom	United Kingdom & Netherlands for one voyage	12
<i>Icebird</i>	Australia	Australia	7
<i>Kotick</i>	Antigua	France	5
<i>Louise</i>	United Kingdom	United Kingdom	6
<i>Paradise</i>	France	France	9
<i>Pelagic</i>	British Virgin Islands	United Kingdom	6
<i>Pelagic Australis</i>	British Virgin Islands	United Kingdom	12
<i>Podorange</i>	London, UK	France	9
<i>Santa Maria Australis</i>	Germany	Chile	10
<i>Selma</i>	Poland	Poland	8
<i>Spirit of Sydney</i>	Australia	Australia	7
<i>Vaiheré</i>	France	Belgium	10
<i>Xplore</i>	Panama	United Kingdom	12

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

Detailed information of the activities conducted during 2013-14 season are listed in Appendix 2, and anticipated activities for the 2014-15 season can be found in Appendix 3. All activities are approved or authorized through the Environmental Impact Assessments and Advance Notifications 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 nearly all activities have been conducted from expedition vessels and yachts for more than a decade.

1.7 Commercial Deep Field Tourism

Three IAATO operators conducted deep field tourism activities during the 2013-14 season. Adventure Network International / Antarctic Logistics & Expeditions (ALE) – one of the founding members of IAATO in 1991 – conducted activities for the 28th consecutive season; and The Antarctic Company (TAC) operated in Antarctica for the ninth consecutive season and fifth as an IAATO operator. Both ALE and TAC are primary logistic providers.

The third company is White Desert (WDL), which operated in Antarctica for the eighth consecutive season and third 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 the field.

1.7.1 Visitor & Staff Numbers

Operator	Clients	Staff and Guides*
ALE	270	149
TAC	65	13
WDL	26	11
Total	583	173

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

1.7.2 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.
- An airdrop was made during January 2014 at Berkner Island to provide a fuel cache to support Emperor penguin visits to Gould Bay.
- 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, S. Africa

1.7.3 Traverses

- ALE operated a number of tractor traverses, primarily for more efficient transport of fuel and cargo, and to support scientific activities.

1.7.4 Camps

- ALE Union Glacier Camp opened October 16, 2013 and closed February 12, 2014.
- TAC Camp opened November 12, 2013 and closed on February 24, 2014.
- WDL Camp opened November 11, 2013 and closed on January 11, 2014.

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 the table below. Note that some clients participated in multiple programs.

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

<i>Program</i>	<i>No. Participating</i>
Emperor Penguin	2
Emperors & Explorers	32
Antarctic Odyssey	3
Climb Antarctica	3
Ski Antarctica	3
Last Degree	18
Marathon	60
South Pole Fly	31
South Pole 90S Overnight	14
Vostok Fly	12

South Pole Ski – Hercules Inlet	9
South Pole Ski – Messner	4
South Pole Ski – Leverett (Vehicle support)	9
McMurdo Return Ski	2
Mount Sidley	12
Mount Vinson	99
Total	313

1.8 Air Operations – Over-flights operated by IAATO Members

For the 2013-14 season, there were no over-flights of Antarctica by IAATO members.

2.0 Preliminary Estimate of Planned Activities for the 2014-15 Season

Appendix 3 illustrates a breakout of tourism categories that are projected for the 2014-15 season.

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, camping (including short overnight stays), helicopter operations, use of remote overhead drones and underwater ROVs.

For the 2014-15 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 26,355 passengers, of which numbers in the air-cruise category are estimated to be 1,698.

Cruise-only tourism, aboard 500-plus passenger vessels with no passengers landing ashore, is expected to reach 9,720 passengers.

Air-land tourism by the three IAATO Members that provide deep field excursions and expeditions, is projected to reach 470 visitors who will be transported inland during the 2014-15 austral summer.

No over-flights by IAATO operators are expected during the 2014-15 season.

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 2014-15 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:

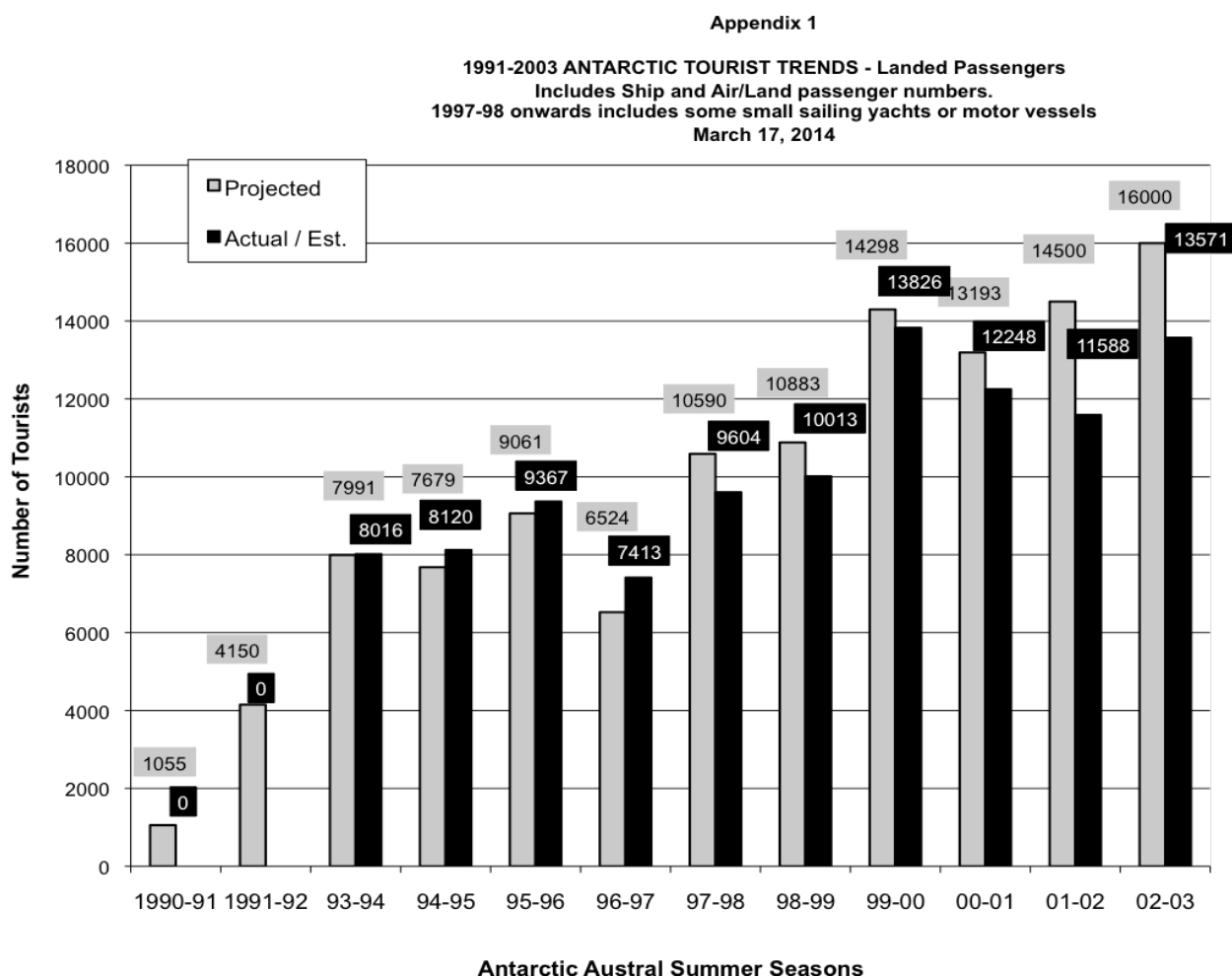
- Tourists by Nationality (Landed)
- Tourists by Nationality (Air and Cruise)
- Tourists by Nationality (All)
- Tourist Nationalities by Vessel
- Trends 1992-2014
- Number of Visitors (tourists, staff, crew) per site per vessel-All Antarctic Sites
- Number of Visitors (tourists, staff, crew) per Site 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.

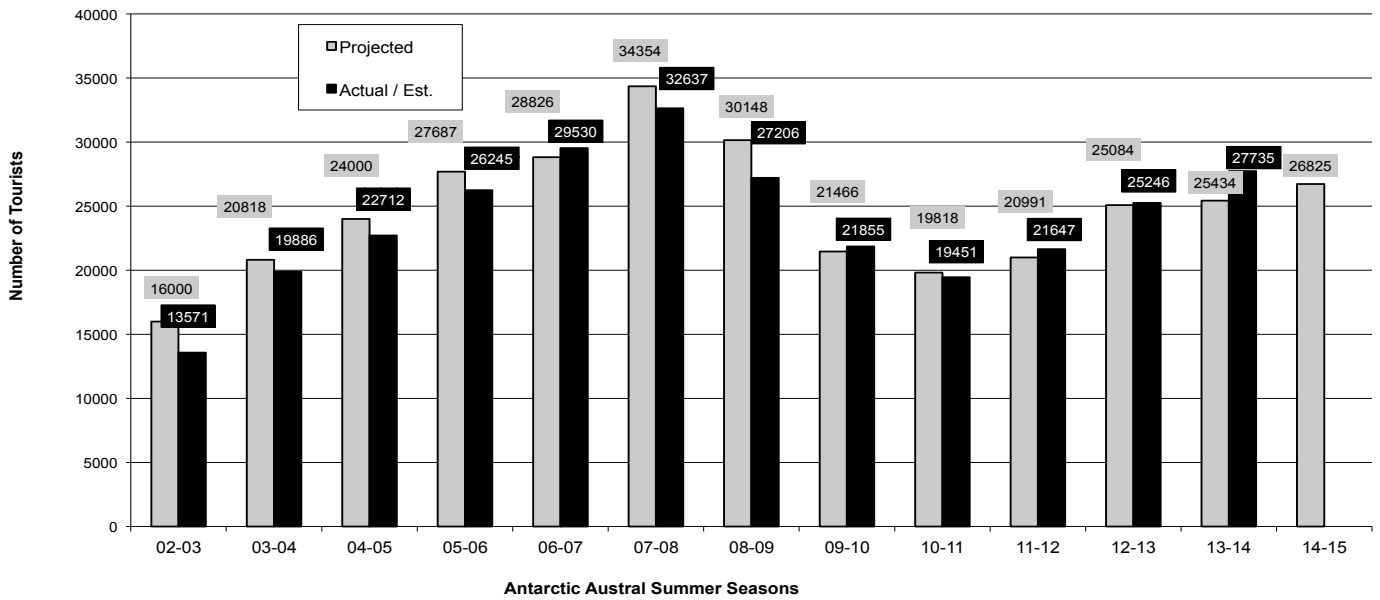
Appendices:

- Appendix 1: Histogram of 1992-2014 Antarctic Tourist Trends – Landed Passengers, including ship and land passenger numbers
- Appendix 2: Overview of Antarctic Tourism 2013-14
- Appendix 3: Preliminary Estimate of Antarctic Tourism 2014-15



Appendix 1

2003-2015 ANTARCTIC TOURIST TRENDS - Landed Passengers
 Includes Ship and Air/Land passenger numbers.
 1997-98 onwards includes some small sailing yachts or motor vessels
 June 30, 2014



Appendix 2: Overview of Antarctic Tourism 2013-14

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

IAATO Members Seaborne Tourism – Peninsula Region 2013-14

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	10	904	small boat, camping, kayaking
<i>Akademik Sergey Vavilov</i>	Russia	One Ocean Expeditions	Canada	122	10	900	small boat, camping, kayaking
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	48	3	91	small boat
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	4	500	small boat
<i>Corinthian</i>	Marshall Islands	Travel Dynamics	United States	100	10	905	small boat
<i>Delphin</i>	Bahamas	Passat Kreuzfahrten	Germany	550	2	712	small boat
<i>Expedition</i>	Liberia	G Adventures	Canada	140	13	1689	small boat, 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
<i>L'Austral</i>	France	Compagnie du Ponant	France	264	9	1709	small boat
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	264	3	572	small boat
<i>Le Boreal</i>	France	Compagnie du Ponant	France	264	6	1088	small boat
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	150	10	1509	small boat, kayaking, ROV, SCUBA diving
<i>Ocean Diamond</i>	Bahamas	Quark Expeditions	United States	278	13	2279	small boat, camping, climbing, kayaking, skiing
<i>Ocean Nova</i>	Bahamas	Polar Quest	Sweden	98	1	75	small boat
<i>Oosterschelde</i>	Netherlands	Waterproof Expeditions	Netherlands	24	2	42	Small boat, SCUBA diving
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	10	963	small boat
<i>Ortelius</i>	Cyprus	Cheesemans' Ecology Safaris	United States	120	1	97	small boat
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	114	12	1183	small boat, camping, climbing, kayaking, SCUBA
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	7	349	small boat, camping, climbing, kayaking, SCUBA DIVING
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	6	650	small boat, skiing
<i>Sea Adventurer</i>	Bahamas	Zegrahm Expeditions	United States	141	1	91	small boat
<i>Seabourn Quest</i>	Bahamas	Seabourn Cruise Lines	United States	462	4	1721	small boat
<i>Sea Explorer</i>	Bahamas	Polar Latitudes	United States	114	10	923	small boat
<i>Sea Spirit</i>	Bahamas	Quark Expeditions	United States	127	11	1115	small boat
<i>Silver Explorer</i>	Bahamas	Silversea Cruises	United States	132	9	1090	small boat
<i>Ushuaia</i>	Comoros	Antarpply Expeditions	Argentina	90	12	922	small boat
<i>Ushuaia</i>	Comoros	Students on Ice	Argentina	90	1	72	small boat
Total					193	24659	

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

Air/Cruise	Vessel Registry	Operator / Charterer	Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	98	19	1225	small boat
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	4	207	small boat, kayaking
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	4	416	small boat
Total					27	1848	

IAATO Member Yachts (all regions) 2013-14

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	7	small boat, kayaking, SCUBA diving
<i>Asteria</i>	Bahamas	EYOS	United Kingdom	12	3	33	small boat
<i>Endurance of Antarctica</i>	United Kingdom	Pelagic Expeditions	United Kingdom		1	2	
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	12	1	7	small boat
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	4	42	small boat, kayaking
<i>Hans Hansson</i>	United Kingdom	Golden Fleece Expeditions	UK Overseas Territory	12	3	23	small boat
<i>Hans Hansson</i>	United Kingdom	Waterproof Expeditions	Netherlands	12	1	6	small boat
<i>Ice Bird</i>	Cayman Islands	Spirit of Sydney Expeditions	Australia	7	3	17	small boat
<i>Kotick</i>	Antigua	Kotick Charters Ltd.	France	5	1	5	small boat
<i>Lord Nelson</i>	United Kingdom	Pelagic Expeditions	United Kingdom	40	1	35	
<i>Louise</i>	United Kingdom	High Latitudes	United Kingdom		1	4	small boat
<i>Paradise</i>	France	Paradise Adventures	France	9	2	11	small boat, camping, skiing
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	3	11	small boat
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	12	3	24	small boat, climbing, kayaking
<i>Podorange</i>	London, UK	Voile Australe	France	9	3	22	small boat
<i>Santa Maria Australis</i>	Germany	SIM Expeditions	Chile	9	3	19	small boat, climbing, kayaking
<i>Selma</i>	Poland	Selma Expeditions	Poland	8	5	37	small boat
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	7	3	20	small boat, camping, climbing, kayaking, skiing
<i>Vaiheré</i>	France	Latitude Océane	Belgium	10	3	25	small boat
<i>Xplore</i>	Panama	Xplore Expeditions	United Kingdom	12	3	18	small boat
Total					49	368	

AATO Large Ships Cruise-Only/Peninsula 2013-14

Vessels	Vessel Registry	Operator / Charterer	Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
Cruise Only							
<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 2013-14

Vessels	Vessel Registry	Operator / Charterer	Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<i>Akademik Shokalskiy</i>	Russia	Heritage Expeditions	New Zealand	58	1	46	small boat
<i>Arctic P</i>	Nassau	EYOS	United Kingdom	12	1	10	small boat, kayaking
<i>Hanseatic</i>	Bahamas	Hapag Lloyd	Germany	200	1	140	small boat
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	106	2	203	small boat
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	58	2	100	small boat

IAATO Members Air/Land Tourism 2013-14

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	unknown	270	aircraft landing, camping, climbing, skiing,
<i>The Antarctic Company (TAC)</i>	Varies	Filchner Ice Shelf, South Pole	Ilyushin-76, DC3 Basler	unknown	65	aircraft landing, camping, climbing, skiing, kiting
<i>White Desert</i>	United Kingdom	The Antarctic Company (TAC)	Coordinated through TAC	unknown	26	aircraft landing, camping, climbing, skiing, kiting
Total					361	
Total				7	499	

SUMMARY OF ACTUALS for 2013-14 SEASON
(All Tourist Types)

Types of Tourism	Number of Vessels	Number of Departures	Total Number of Passengers
IAATO Seaborne Tourism Peninsula	22	193	24,659
IAATO Seaborne Tourism Ross Sea/Continental	5	7	499
IAATO Sailing Vessels/Yachts	20	49	368
IAATO Air/Cruise Peninsula	3	27	1,848
IAATO Large Ships Cruise-Only/Peninsula	4	7	9,670
IAATO Air/Land Tourism			361
IAATO Member Air/Overflights/Peninsula			0
TOTAL	54	283	37,405

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

Total Visitors for 2013-14 Season:	
Seaborne Traditional Tourism (with landings)	25,526
Seaborne Tourism Cruise-Only (no landings)	9,670
29 Air/Cruise	1,848
Air/Land Tourism	361
Over-flights (no landing)	0
Total	37,405

Appendix 3: Preliminary Estimate of Antarctic Tourism 2014-2015
Based on information provided by IAATO Members to the IAATO Secretariat as of March 17, 2014

IAATO Members Seaborne Tourism – Peninsula Region 2014-15

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	11	49	539	Small boat, camping, kayaking, ski mountaineering, snowshoeing, photography, marathon, station visits, small boat landing, ship cruise
<i>Akademik Sergey Vavilov</i>	Russia	One Ocean Expeditions	Canada	122	92	10	46	460	Small boat, camping, climbing, kayaking, skiing, snowshoeing, station visits, small boat landing, ship cruise
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	48	48	5	40	200	Small boat landing, ship cruise.
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	150	6	130	780	Small boat, small boat cruising, ship cruising
<i>Corinthian</i>	Marshall Islands	Travel Dynamics	United States	100	100	8	80	640	Small boat cruising, small boat landing, ship cruise
<i>Delphin</i>	Bahamas	Passat Kreuzfahrten	Germany	550	350	2	300	600	Small boat cruising, small boat landing, ship cruise
<i>Expedition</i>	Liberia	G Adventures	Canada	140	134	13	126	1638	Small boat cruising, small boat landing, ship cruising, camping, kayaking
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	318	254	9	230	2070	Small boat cruising, small boat landing, ship cruising, logistic support, snowshoeing, kayaking
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	200	162	6	140	840	Small boat cruising, small boat landing, ship cruise
<i>Le Soleal</i>	France	Compagnie Du Ponant	France	264	200	11	180	1980	Small boat cruising, small boat landing, ship cruise, extended walk, ice landing, station visit
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	264	200	4	194	776	Small boat landing, ship cruise
<i>Le Boreal</i>	France	Compagnie Du Ponant	France	264	200	5	180	900	Small boat cruising, small boat landing, ship cruise, extended walk, ice landing, station visit

<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	150	148	10	145	1450	Ship cruising, small boat cruising, hiking, kayaking, ROV, SCUBA diving-staff only
<i>National Geographic Orion</i>		Lindblad Expeditions	United States	102	100	4	100	400	Small boat cruising, small boat landing, kayaking, ROV, ship cruise
<i>Ocean Diamond</i>	Bahamas	Quark Expeditions	United States	278	189	11	160	1760	Small boat landing, small boat cruising, camping, climbing, kayaking, skiing, , ship cruise
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	98	67	3	57	171	Small boat cruising, small boat landing, kayaking, snowshoeing, ship cruise
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	116	4	87	348	Small boat landing, camping, SCUBA, helicopter operations, hiking, ship cruise
<i>Ortelius</i>	Cyprus	Cheesemans ' Ecology Safaris	United States	120	116	1	100	100	Small boat cruising, small boat landing, extended walks, ship cruise
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	116	116	11	87	957	Small boat landing, camping, hiking, kayaking, SCUBA, ship cruise
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	52	6	50	300	Small boat cruising, small boat landing, station visit, SCUBA, snorkeling, climbing, kayaking, ship cruise
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	117	12	100	1200	Small boat cruising, small boat landing, camping, kayaking, ship cruise
<i>Seabourn Quest</i>	Bahamas	Seabourn Cruise Line	United States	462	450	4	450	1800	Small boat landing, ship cruise
<i>Sea Explorer</i>	Bahamas	Polar Latitudes	United States	114	110	11	100	1100	Small boat cruising, small boat landing, kayaking, ship cruising
<i>Sea Spirit</i>	Bahamas	Quark Expeditions	United States	127	114	8	97	776	Small boat landing, small boat cruising, camping, kayaking
<i>Sea Spirit</i>	Bahamas	Zegrahm Expeditions	United states	127	98	2	98	196	Small boat cruising, small boat landing, kayaking, ship cruise
<i>Silver Explorer</i>	Bahamas	Silversea Cruises	United States	132	130	9	115	1035	Small boat cruising, small boat landing, ship cruise
<i>Ushuaia</i>	Comoros	Antarpply Expeditions	Argentina	90	84	14	70	980	Small boat cruising, small boat landing, ship cruise
<i>Ushuaia</i>	Comoros	Students on Ice	Canada	90	65	1	65	65	Small boat cruising, small boat landing, ship cruise
Total						201		24061	

IAATO Members Air/Cruise Tourism – Peninsula Region 2014-15

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Intended Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Australis</i>	Australia	Ocean Expeditions	Australia	12	9	2	9	18	Ecotourism filming, science, kayaking, small boat cruising, mountaineering, camping, SCUBA, ship cruise
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	12	4	12	48	Small boat cruising, small boat landing, camping, kayaking, ice diving, ship cruise
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	98	67	16	57	912	Small boat cruising, small boat landing, kayaking, snowshoeing, ship cruise
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	52	4	50	200	Small boat cruising, small boat landing station visit, SCUBA, snorkelling, kayaking, climbing, ship cruise
<i>Sea Adventurer</i>	Bahamas	Quark Expeditions	United States	141	117	5	100	500	Small boat cruising, small boat landing, camping, kayaking, ship cruise
TBD		Henry Cookson	United Kingdom	20	10	2	10	20	Small boat cruising, camping on ice, SCUBA, kayaking, skiing, helicopter, trekking, ship cruise
Total						33		1698	

IAATO Members Yachts (all regions) 2014-15

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	12	9	4	9	36	Ecotourism, filming, small boat cruising, camping, kayaking, SCUBA, science
<i>TBD</i>	Bahamas	EYOS	United Kingdom	12	8	5	8	40	
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	12	8	4	4	16	Small boat landing
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	12	2	12	24	Small boat cruising, small boat landing, camping, kayaking, ice diving
<i>Hans Hansson</i>	United Kingdom	Golden Fleece Expeditions	UK Overseas Territory	12	12	3	10	30	Small boat cruising, small boat landing, filming
<i>Icebird</i>	Australia	Spirit of Sydney	Australia	7	6	3	6	18	Small boat, kayaking, climbing, skiing, camping
<i>TBD</i>	United Kingdom	High Latitudes	United Kingdom	12	12	1	6	6	Small boat cruising, small boat landing
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	6	1	6	6	Small boat landing
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	12	8	3	8	24	Small boat landing
<i>Podorange</i>	London, UK	Voile Australe	France	9	9	3	8	26	Small boat landing, skiing
<i>Pumula</i>		Pelagic		8	8	1	8	8	,Small boat landing
<i>Santa Maria Australis</i>	Germany	Sea and Ice Mountain Expeditions	Chile	10	10	2	10	20	Small boat landing
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	7	6	3	6	18	Small boat landing
<i>Vaihéré</i>	France	Latitude Océane	Belgium	10	10	3	10	30	Small boat landing
<i>Xplore</i>	Panama	Xplore Expeditions	United Kingdom	12	8	2	8	16	Small boat landing
Total						40		318	

IAATO Members Seaborne Tourism – Continental/Ross Sea 2014-15

Vessels	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Intended Passenger Capacity	Est. # Voyages	Est.# Average Load	Est. # of Passengers	Activities incl. landings
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	116	2	87	174	Small boat landing, camping, SCUBA, helicopter operations, hiking
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	58	50	2	48	96	Small boat landing,
<i>SY Selma (**being reconfirmed)</i>	Poland	Selma Expeditions	Poland	8	8	1	8	8	Small boat landings
Total						5		278	

IAATO Members Cruise Only 2014-15

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>Azamara Journey</i>	Malta	Azamara Celebrity/RCCL	United States	1200	1200	1	600	600	Cruise Only
<i>Celebrity Infinity</i>	Malta	Azamara Celebrity/RCCL	United States	2449	2449	2	2000	4000	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		9720	

IAATO Members Air/Land Tourism 2014-15

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	Patriot Hills, South Pole	Ilyushin-76, Twin Otter, DC3 Basler	25	12-13	310	Aircraft landing
The Antarctic Company (TAC)	Varies	Filchner Ice Shelf, South Pole	Ilyushin-76, DC3 Basler	Varies		100	Aircraft landing, camping, climbing, skiing, kiting
White Desert (WDL)	United Kingdom		Coordinated through TAC	Varies		60	Aircraft landing
Total				25		470	

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

**SUMMARY OF ESTIMATES for 2014-15 SEASON
(All Tourist Types)**

Types of Tourism	Number of Vessels	Number of Departures	Total Number of Passengers
IAATO Seaborne, Landed/Peninsula	24	201	24,061
IAATO Seaborne, Landed/Ross Sea-Continental	3	5	278
IAATO Sailing Vessels/Yachts	17	40	318
IAATO Air-Cruise/Peninsula	6	33	1,698
IAATO Cruise-Only/Peninsula	4	7	9720
IAATO Air/Land Tourism		25	470
IAATO Air Over-flights/Peninsula		0	0
TOTAL	54	311	36,545

* 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 2014-15 Season:	
Seaborne Traditional Tourism (with landings)	24,657
Seaborne Tourism Cruise-Only (no landings)	9,720
Air/Cruise	1,698
Air/Land Tourism	470
Over-flights (no landing)	0
Total	36,545