IAATO Overview of Antarctic Tourism: A Historical Review of Growth, the 2020-21 Season, and Preliminary Estimates for 2021-22

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

Introduction

IAATO is pleased to provide the statistical data compiled from Post Visit Reports for the 2020-21 season.

Due to the SARS CoV-2 pandemic, IAATO Operator expeditions during the 2020-21 season were limited to two individual expeditions, comprised of three yachts. Three IAATO Operators also provided dedicated air or vessel support to National Antarctic Programs.

We also include the preliminary estimates for 2021-22 as of 12 May, 2021. These estimates represent the current best-case operating scenario for the 2021-22 season. However, operations will not only depend on Antarctic Gateway protocols but also on worldwide travel restrictions. We will provide further updates on the 2021-22 season activities to Competent Authorities in October 2021.

In addition to providing our annual overview of IAATO activities to the ATCM we also take this opportunity, in IAATO’s 30th year, to build on discussions with different Treaty Parties around growth and diversification of activities, by including a historical perspective which may aid ongoing discussions. Because 2020-2021 was an irregular season for IAATO, data have been omitted from overall discussions in this paper.

The figures presented throughout this paper are based on information provided to IAATO by its Operators. Visitor numbers reflect only those travelling with IAATO Operator companies and do not include Observers, Government Officials, or those individuals taking part in research projects that are being supported by IAATO Operators.

IAATO’s Membership continues to encompass the majority of private-sector tour operators. Operator activities are permitted or authorized through Environmental Impact Assessments, Advance Notifications and, where relevant, Waste Management Permits, and submitted in advance of the season. Nearly all activities, which follow IAATO policies and guidelines, have been conducted on expeditions for more than two decades, and in many cases since the beginning of Antarctic tourism circa the 1960’s. IAATO Operators continue to work together to coordinate activities in advance, so that operations are conducted in a safe and environmentally responsible manner, and that activities are planned to have no more than a minor or transitory impact on the Antarctic environment.

1.0 Historical Overview

1.1 IAATO Member Activities and Managing for Growth

Prior to the SARS CoV-2 pandemic, the growth of the Antarctic tourism industry was a topic of great interest within the Antarctic and worldwide communities. In three decades, IAATO has seen two other periods of growth - once during the mid-1990s and then again in the period 2003-2008. During each of these periods of growth, and in the intervening ‘lull’ in activities, IAATO has brought in a series of tourism management measures, many of which were subsequently adopted by the ATCM. With advancements in technology, reporting and communications, and building on lessons learned in the past, IAATO has been able to forecast and monitor the current period of growth, making measured decisions and advancements to properly position the organisation as changes happen.

While the pandemic effectively cancelled the industry’s activities for the 2020-2021 season, it is anticipated that when the global pandemic is eventually brought under control, activity levels will eventually bounce back to pre-pandemic levels. Anticipating this eventual return to normal levels of activity, IAATO continues to strengthen, test, and refine the suite of ‘tools’ to ensure the continued successful management of activities.

One of the most recent strengthening of requirements has been a review of field staff experience. In its early years, IAATO established the requirement that 75% of field staff would have previous Antarctic experience. Over the years, the breadth of activities offered have expanded as has the range of operations, requiring a broader range of specialized skills for field staff. With more advanced tools in place, such as the IAATO Online Assessment and the development worldwide of professional standards in guiding and other activities, this benchmark has been reviewed to recognise and reflect this development. As of the 2021-22 season, in accordance with IAATO Bylaws, Operators are required to hire a sufficient number of expedition staff, at least 80% of whom have previous professional guiding experience relevant to their specific role (e.g. kayak guide, small boat drivers) and 50% of whom have previous Antarctic experience, as agreed by IAATO definition. Organizers also are required to ensure that all field staff in their employ take and pass the relevant IAATO online assessment module.

*Figures 1.1 – 1.3* give an overview of some of the key growth management tools introduced by IAATO during three periods of growth between 1993-2021.

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

**Ship Scheduler Development**

**Site Guidelines Development**

**Site Monitoring & Reporting Scheme**

**IAATO Vessel Tracking**

**Wilderness Etiquette**

**Yacht Outreach Program**

**Voluntary Field Staff Assessments**

*Figure 1.2: Examples of IAATO management tools introduced in response to growth between 2001 and 2012*

**Mandatory Whale Avoidance Requirements**

**Live Ship Scheduler and New Database**

**Mandatory Field Staff Assessments**

**Expansion of Mandatory Observer Scheme**

**Code of Conduct**

**Systematic Conservation Plan**

**Additional Activity Guidelines**

**Enhanced Field Staff Experience requirements**

*Figure 1.3: IAATO management tools introduced in response to growth between 2010 – Present*

**1.2 IAATO Member Nationalities**

Reflecting on the latest period of growth, the Post Visit Reports submitted to IAATO indicate the top 10 nationalities who visited Antarctica has remained relatively consistent over the last ten seasons, although proportionately, China has seen the greatest increase in travelers to Antarctica. An overview of the last 10 years can be found in *Figure 2: Top 10 Passenger nationalities travelling with IAATO operators between 2010-2020.*

*Figure 2: Top 10 Passenger nationalities travelling with IAATO operators between 2010-2020*

2.0 IAATO Seaborne Operations Overview

This section focuses on IAATO Seaborne Operations.

2.1 IAATO Seaborne Activities

For the last 30 years shipborne tourism on the Peninsula has been the dominant vector of travel. The vast majority of tourism voyages (98%) operate in the Antarctic Peninsula region during the five-month austral summer season (from November to March), and depart from Ushuaia, Argentina or, to a lesser extent, from other ports north of the Antarctic Treaty Area.

Currently, to the best of our knowledge, all commercial SOLAS passenger ship Operators conducting tourism activities in the Antarctic Treaty Area are members of IAATO. Table 1. 10-Year Statistics of Recorded Seaborne Tourism (including Yachts and Cruise Only) offers a summary of the last decade of both IAATO SOLAS and non-SOLAS vessel tourism.

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

*Based on IAATO Post Visit Reports.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Year** | **No. of operators**  | **No. of ships &** **yachts**  | **No. of voyages** | **No. of passengers making landings** | **No. of cruise only passengers** |
| 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 | 38 | 48 | 286 | 29,960 | 8,109 |
| 2016-17 | 38 | 47 | 298 | 36,440 | 7,475 |
| 2017-18 | 44 | 50 | 344 | 42,576 | 9,131 |
| 2018-19 | 44  | 56  | 360  | 44,600 | 10,889 |
| 2019-20 | 47 | 62 | 408 | 55,164 | 18,506 |
| 2020-21 | 2 | 3 (Yachts) | 2 | 15 | 0 |

IAATO vessel Operators maintain a minimum of 20:1 field staff to passenger ratio when ashore. Staff and guides assist in the preparation of policies and guidelines and ensure that they are implemented both in the field, and through educational programmes on board.

2.3 Scope of IAATO Seaborne Activities

Commercial tourist activities included the operation of small inflatable boats (Zodiac, Polar Cirkle Boats, R.I.B., Naiad, hovercraft, etc.), shore landings, and to a lesser extent activity such as, but not limited to, kayaking, climbing, and short overnight stays. Most of these activities have taken place for a minimum of 20 years with some dating back to the beginning of Antarctic tourism in the 1960’s.

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

Representing the current expansion of descriptions during this last period of growth, *Figure 3: Commercial Operated Activities Conducted from Expedition Vessels and Yachts for 2019-20* illustrates activities offered by IAATO vessels including cruise-only and yachts, for 2019-2020. Small boat cruising and landing remain the most popular activities (58%) for vessels offering landings, while scenic ship cruising for both landing and cruise-only vessels also remains a key activity. A range of other activities (e.g. kayaking and short overnight stays) contribute to a smaller portion (9%) of off-ship activities. Looking ahead it is anticipated that ship cruising, small boat cruising and small boat landings will continue to be the dominant activity and other activities will remain small scale in comparison.

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



*Figure 3: Commercial Operated Activities Conducted from Expedition Vessels and Yachts for 2019-20*

**3.0 IAATO Deep Field and Air Tourism Overview**

Five IAATO Operators conduct deep field tourism activities and one air Operator, which also supports air-cruise operations, offers single day or multi-day Antarctic experiences in the South Shetland Islands. *Table 2. IAATO Deep Field and Air Operators Main Camps and Main Area of Operation* provides an overview of Deep Field and Air Operators primary areas of operation/base camp. Deep Field Operators also utilise satellite field camps and runways for their different activities and flights. *Figure 4: Deep Field and Air Operator Clients 2010-2021* gives an overview ofthe deep field and air client numbers for the last decade. *Table 3: Programs and Participant Numbers (clients) for 2015-20* offers additional information of those operations.

*Table 2. IAATO Deep Field and Air Operators Main Camps and Main Area of Operation*

|  |  |  |
| --- | --- | --- |
| **Deep Field and Air Operators** | **Main Camp or Runway** | **Main Area of Operation** |
| **Antarctic Logistics and Expeditions (ALE)** | Union Glacier | West Antarctica to South Pole  |
| **Arctic Trucks** | Union Glacier and Dronning Maud Land | Dronning Maud Land, West Antarctica to South  |
| **Ice Trek Expeditions** | Union Glacier and Dronning Maud Land | Dronning Maud Land, West Antarctica to South  |
| **The Antarctic Company (TAC)** | Dronning Maud Land | Dronning Maud Land to South Pole |
| **White Desert (WDL)** | Dronning Maud Land | Dronning Maud Land to South Pole |
| **Aerovias DAP** | King George Island  | King George Island |

*Figure 4: Deep Field and Air Operator Clients 2010-2021*

Deep Field and Air Operators usually maintain a higher client to staff ratio than is typical for seaborne tourism, often one guide to every three clients. The exception is with solo expeditions, for example during South Pole Ski Expeditions, where the clients are supported remotely and closely monitored through communication protocols. All Deep Field and Air Operators prepare contingency plans for the health, safety, medical care and evacuation or their staff and clients, in line with ATCM Resolution 6(2017).

3.1 Deep Field Operator 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 last five seasons, are outlined in *Table 3: Programs and Participant Numbers (clients) for 2015-20*. Total numbers participating include clients from all five IAATO Deep Field Operators. Note that some clients participated in multiple programs. Most activities detailed below have been offered consistently since the 1990’s and have not changed in this latest period of growth. Additionally, activities for air Operator Aerovias DAP are listed for seasons 2018 – 2020, reporting on their activities since becoming an IAATO Member.

Table 3: Programs and Participant Numbers (clients) for 2015-20

(Note: some participants may take part in several programs)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Program** | **2015-16** | **2016-17** | **2017-18** | **2018-19** | **2019-20** |
| Emperor Penguin Colony Visits | 45 | 50 | 94 | 142 | 189 |
| Deep Field Experiences (camping, skiing, mountaineering, skydiving, cycling, etc.) | 60 | 51 | 88 | 44 | 243 |
| Deep Field Flights (e.g. to Pole of Inaccessibility) | 21 | 4 | 0 | 17 | 25 |
| South Pole Fly-in | 107 | 71 | 100 | 172 | 278 |
| South Pole Ski Expedition | 7 | 12 | 18 | 18 | 37 |
| South Pole Motorised Expedition | 0 | 15 | 3 | 22 | 18 |
| Last 1-2 Degree Expedition | 30 | 43 | 44 | 43 | 117 |
| Antarctic Crossing (ski & motorised) | 2 | 18 | 7 | 0 | 27 |
| Vinson Massif | 143 | 111 | 145 | 152 | 399 |
| Marathon | 80 | 113 | 124 | 120 | 317 |
| Day Trips King George Island |  |  |  | 112 | 123 |

4.0 Preliminary Estimate of Planned Activities for the 2020-21 Season

The 2020-21 season of Antarctic tourism was effectively cancelled as a result of the SARS CoV-2 pandemic. How and when the industry will recover is yet to be seen, but the pandemic will continue to affect IAATO Operator activities for the 2021-22 season and possibly beyond. The preliminary estimates in Appendix 2 represent the current best-case operating scenario for the 2021-22 season should the majority of travel restrictions be removed. Operations will depend on both Antarctic Gateway protocols and worldwide travel restrictions and/or protocols. We will provide further updates on the 2021-22 season activities to Competent Authorities in October 2021.

5.0 Tourism Statistics

The following data is publicly available on the IAATO website (<https://iaato.org/information-resources/data-statistics/visitor-statistics/>). In order to better assist with delivering appropriate statistics for interested parties, those who wish to access the IAATO tourism statistics must now do so through a data access portal.

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

Appendices:

* Appendix 1: Overview of Antarctic Tourism 2020 – 21
* Appendix 2: Preliminary Estimate of Antarctic Tourism 2021-2022 (As of May 11, 2021)

**Appendix 1: Overview of Antarctic Tourism 2020 – 21**

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| SUMMARY OF ACTUALS for 2020-2021 SEASON |
| (All tourist types) |
| \*Note all numbers and company status are subject to change and are based on reports as of |
|  |  |  |  |
| **Types of Tourism** | **Number of Vessels** | **Number of Departures** | **Total Number of Passengers** |
| IAATO Traditional Seaborne Tourism Peninsula | 0 | 0 | 0 |
| IAATO Seaborne Tourism Ross Sea / Continental | 0 | 0 | 0 |
| IAATO Sailing Vessels / Yacht Tourism Peninsula | 1 | 1 | 9 |
| IAATO Air-Cruise Peninsula | 2 | 2 | 6 |
| IAATO Large Ships/ Cruise - Only Peninsula | 0 | 0 | 0 |
| IAATO Deep - Field Tourism | 0 | 0 | 0 |

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| **IAATO Members Air-Cruise Tourism - Peninsula Region - 2020-2021** |
| **Vessel** | **Operator / Charterer** | **Actual # Voyages** | **Actual # of Passengers** |
| Explorer | Spirit of Sydney Expeditions  | 1 | 0 |
| Voyager | Spirit of Sydney Expeditions  | 1 | 6 |
| **Total** |  | **2** | **6** |
|  |  |  |  |
| **IAATO Members Yacht Tourism - Peninsula Region - 2020-2021** |
| **Vessel** | **Operator / Charterer** | **Actual # Voyages** | **Actual # of Passengers** |
| S/V Australis | Ocean Expeditions Ltd | 1 | 9 |
| **Total** |  | **1** | **9** |

**Appendix 2: Preliminary Estimate of Antarctic Tourism 2021-2022 (As of May 11, 2021)**

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| **SUMMARY OF ESTIMATES for 2021-2022 SEASON** |
| (All tourist types) |
| \*Note all numbers and company status are subject to change and are preliminary estimates only |
|  |  |  |  |
| **Types of Tourism** | **Number of Vessels** | **Number of Departures** | **Total Number of Passengers** |
| IAATO Traditional Seaborne Tourism Peninsula | 39 | 333 | 46953 |
| IAATO Seaborne Tourism Ross Sea / Continental | 5 | 9 | 1138 |
| IAATO Sailing Vessels / Yacht Tourism Peninsula | 10 | 26 | 212 |
| IAATO Air-Cruise Peninsula | 8 | 61 | 3375 |
| IAATO Large Ships/ Cruise - Only Peninsula | 2 | 4 | 7500 |
| IAATO Deep - Field Tourism | 4 Operators | Varies | 634 |

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| **IAATO Members Traditional Seaborne Tourism - Peninsula Region - 2021-2022** |
| **Vessel** | **Operator / Charterer** | **Est. # Voyages** | **Est. # of Passengers** |
| Bark Europa | Rederij Bark EUROPA B.V. | 5 | 160 |
| Corinthian | Grand Circle Corporation | 9 | 774 |
| Expedition | G Adventures | 13 | 1170 |
| Fram | Hurtigruten AS | 9 | 1125 |
| Hamburg | Plantours Kreuzfahrten | 4 | 1000 |
| HANSEATIC inspiration | Hapag-Lloyd Cruises | 4 | 600 |
| HANSEATIC nature | Hapag-Lloyd Cruises | 5 | 750 |
| HANSEATIC spirit | Hapag-Lloyd Cruises | 4 | 600 |
| Hebridean Sky | Noble Caledonia | 3 | 285 |
| Hondius | Oceanwide Expeditions | 12 | 2040 |
| Janssonius | Oceanwide Expeditions | 9 | 1530 |
| L'Austral | Ponant | 11 | 2200 |
| Le Boreal | Ponant | 9 | 1800 |
| Le Commandant Charcot | Ponant | 11 | 2200 |
| Le Lyrial | Abercrombie & Kent USA, LLC | 4 | 640 |
| Le Lyrial | Ponant | 9 | 1800 |
| Legend | EYOS Expeditions Ltd. | 2 | 44 |
| Magellan Explorer | Antarctica21 | 2 | 120 |
| MS Fridtjof Nansen | Hurtigruten AS | 14 | 3500 |
| MS Roald Amundsen | Hurtigruten AS | 10 | 2500 |
| National Geographic Endurance | Lindblad Expeditions | 6 | 570 |
| National Geographic Explorer | Lindblad Expeditions | 9 | 1017 |
| National Geographic Resolution | Lindblad Expeditions | 8 | 760 |
| Ocean Adventurer | Quark Expeditions | 7 | 448 |
| Ocean Atlantic | Albatros Expeditions | 13 | 1950 |
| Ocean Diamond | Quark Expeditions | 10 | 950 |
| Ocean Endeavour | Intrepid Travel | 11 | 1925 |
| Ocean Victory | Albatros Expeditions | 13 | 1950 |
| Ortelius | Oceanwide Expeditions | 8 | 864 |
| Plancius | Cheesemans' Ecology Safaris | 1 | 100 |
| Plancius | Oceanwide Expeditions | 10 | 1080 |
| Scenic Eclipse | Scenic Tours (USA) Inc | 7 | 1400 |
| Sea Spirit | Poseidon Expeditions | 11 | 550 |
| Seabourn Quest | Seabourn Cruise Line Ltd. | 5 | 2150 |
| Seaventure | Polar Latitudes | 10 | 1200 |
| Silver Cloud | Silversea Cruises Ltd. | 7 | 1302 |
| Silver Explorer | Silversea Cruises Ltd. | 7 | 742 |
| Sylvia Earle | Aurora Expeditions | 6 | 396 |
| Ultramarine | Quark Expeditions | 11 | 1100 |
| Ushuaia | Antarpply Expeditions | 13 | 715 |
| World Explorer | Quark Expeditions | 11 | 946 |
| **Total** |  | **333** | **46953** |

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| **IAATO Members Air-Cruise Tourism - Peninsula Region - 2021-2022** |
| **Vessel** | **Operator / Charterer** | **Est. # Voyages** | **Est. # of Passengers** |
| Magellan Explorer | Antarctica21 | 16 | 960 |
| MY Hans Hansson | Quixote Expeditions | 5 | 60 |
| Ocean Adventurer | Quark Expeditions | 7 | 448 |
| Ocean Nova | Antarctica21 | 13 | 780 |
| S/V Ocean Tramp | Quixote Expeditions | 7 | 49 |
| Silver Explorer | Silversea Cruises Ltd. | 4 | 424 |
| Sylvia Earle | Aurora Expeditions | 6 | 396 |
| World Explorer | Quark Expeditions | 3 | 258 |
| **Total** |  | **61** | **3375** |

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| **IAATO Members Yacht Tourism - Peninsula Region - 2021-2022** |
| **Vessel** | **Operator / Charterer** | **Est. # Voyages** | **Est. # of Passengers** |
| La Datcha | EYOS Expeditions Ltd. | 2 | 24 |
| MY Hanse Explorer | "Hanse Explorer" GmbH and Co. KG | 5 | 50 |
| Naia | EYOS Expeditions Ltd. | 1 | 12 |
| S/V Icebird | Icebird Expeditions | 3 | 15 |
| S/V Podorange | Voile Australe | 2 | 12 |
| S/V Santa Maria Australis | SIM Expeditions | 3 | 18 |
| S/V Selma Expeditions | Selma Expeditions | 3 | 24 |
| S/V Spirit of Sydney | Spirit of Sydney Expeditions  | 3 | 21 |
| S/V Vaïhéré | Latitude Oceane | 3 | 30 |
| S/Y YPAKE II | SUR Expeditions | 1 | 6 |
| **Total** |  | **26** | **212** |

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| **IAATO Cruise Only Tourism - Peninsula Region - 2021-2022** |
| **Vessel** | **Operator / Charterer** | **Est. # Voyages** | **Est. # of Passengers** |
| Volendam | Holland America Line | 1 | 1500 |
| Westerdam | Holland America Line | 3 | 6000 |
| **Total** |  | **4** | **7500** |

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| --- |
| **IAATO Members Seaborne Tourism – Continental/Ross Sea - 2021-2022** |
| **Vessel** | **Operator / Charterer** | **Est. # Voyages** | **Est. # of Passengers** |
| Greg Mortimer | Aurora Expeditions | 3 | 198 |
| HANSEATIC inspiration | Hapag-Lloyd Cruises | 1 | 150 |
| Le Commandant Charcot | Ponant | 1 | 200 |
| Le Soleal | Ponant | 2 | 400 |
| National Geographic Endurance | Lindblad Expeditions | 2 | 190 |
| **Total** |  | **9** | **1138** |

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| --- |
| **IAATO Members Deep-Field Tourism - 2021-2022** |
| **Operator / Charterer** | **Antarctic Area Visited** | **Est. # Expeditions** | **Est. # of Passengers** |
| Antarctic Logistics & Expeditions LLC | Continent | Varies | 384 |
| Icetrek Expeditions and Equipment | Continent | Varies | 10 |
| The Antarctic Company (TAC) (Pty.) Ltd. | Continent | Varies | 30 |
| White Desert Ltd | Continent | Varies | 210 |
| **Total** |  |  | **634** |