



**Antarctic Treaty
Consultative Meeting XXXV**

H O B A R T 2 0 1 2

Agenda Item: ATCM 11
Presented by: IAATO
Original: English
Submitted: 22/05/2012

HCA12-INF5

**IAATO Overview of Antarctic Tourism:
2011-12 Season and Preliminary
Estimates for 2012-13 Season**

IAATO Overview of Antarctic Tourism: 2011-12 Season and Preliminary Estimates for 2012-13 Season

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

Introduction

IAATO is pleased to provide an overview of Antarctic tourism from IAATO operators for the recently completed 2011-12 season and estimates for the 2012-13 season.

The total number of passengers and clients carried by IAATO operators during the 2011-12 decreased to 26,519. This is a decline of 21.6 percent from the previous 2010-11 Antarctic tourism season (33,824). Details of the 2011-12 season can be found in Appendix 1 of this paper.

While worldwide economic factors were responsible for the declines across all forms of Antarctic tourism in 2008-09, 2009-10 and 2010-11, the sharp decrease during the 2011-12 season was due to changes in International Maritime Organization (IMO) MARPOL Annex I, which came into effect August 1, 2011. These changes banned the use and carriage of Heavy Fuel Oil (HFO) in the Antarctic Treaty area and had a significant impact on the number of overall tourists to Antarctica as it reduced the number of voyages by IAATO cruise-only operators, who use vessels carrying more than 500 passengers.

Estimates for the 2012-13 season can be found in Appendix 3 of this paper. These estimates are based on information provided to IAATO by its operators as of May 16, 2012, and indicate a total of 34,950 tourists. This brings the total number of tourists to Antarctica back in the vicinity of the 2010-2011 season total.

1.0 Overview

1.1 IAATO Member Activities

IAATO Membership continues to incorporate the majority of recognized private-sector tour operators. All commercial SOLAS Passenger Ship operators conducting tourism activities in the Antarctic Treaty area belong to IAATO at the present time. All these operators have submitted Environmental Impact Assessments (Initial Environmental Evaluations or Preliminary Assessments) or operational documents to their appropriate National Authority.

While there was an overall decrease in total passenger numbers, this trend was not uniform across all segments. A summary of IAATO operator activities for the 2011-12 season follows:

- 21,131 passengers landed from seaborne vessels in the Antarctic Treaty Area, a 10.8 percent increase over the previous season's total of 19,065 vessel-landed passengers. Of this total:
 - 19,269 passengers aboard 173 voyages on traditional seaborne vessels landed in the Antarctic Peninsula area, a slight increase over the previous season's 18,021 passengers and 172 voyages;
 - 773 passengers took part in 11 voyages to the Ross Sea or Continental region of Antarctica, an increase from the previous season's 331 passengers and five voyages. This increase was due, in part, to interest in the centenary of Douglas Mawson's Antarctic expedition;
 - 229 passengers sailed on 30 trips aboard yachts (sailing or motor) that carry 12 or fewer passengers to the Antarctic Peninsula area, an increase over the previous season's 182 passengers and 24 trips;

- 860 passengers participated in 15 air-cruise trips in the Antarctic Peninsula area, flying to/from King George Island (either one-way or round-trip) from/to South America to embark a vessel and cruise for approximately one week, making landings. This represents an increase over the 531 passengers and 12 air-cruise trips during the 2010-11 season. The three IAATO operators participating in this air-cruise segment included one operator with a decade of air-cruise experience and two other operators – both experienced in traditional seaborne cruising – testing the air-cruise concept for the first time.
- 4,872 passengers travelled on five voyages aboard 500-plus-passenger vessels operating “cruise-only” voyages, making no landings in the Antarctic Treaty Area. This is a marked decrease from the 14,373 passengers and 10 cruise-only voyages during the previous 2010-11 season, and as mentioned above, is due to ban on the use and carriage of HFO coming into force.
- 516 clients participated in multi-day land expeditions in the continental interior, an increase over the 386 clients in this segment during the 2010-11 season. This increase was largely due to expeditions and activities held to commemorate the 100th anniversary of the attainment of the South Pole in 1911-12.
- No passengers participated in IAATO operator over-flights to the Antarctic continent.

1.2 Scope of Commercial Tourist Activities for Seaborne Tourism

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

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

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

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

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

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

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

The vast majority of tourism voyages operate in the Antarctic Peninsula region during the five-month austral summer season (from November to March), departing from Ushuaia or, to a lesser extent, from other ports north of the 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 20101-112 season. The majority (83.3 percent) came from 10 different countries (see Table 2).

Table 2: Percentage of Known Passenger Nationalities

Nationality	Percentage of total
United States	33.9
Australia	11.1
Germany	8.7
United Kingdom	7.7
Canada	6.1
China	4.4
France	4.1
Netherlands	3.3
Switzerland	2.4
Japan	1.6
Other	16.7

1.4 Commercial Tour Vessels Operating in 2011-12

A full list of IAATO operator commercial tour vessels that completed cruises to the Antarctic, including information on their registry, permitting authority and passenger capacity is given in Appendix 1. In total, there were 23 vessels carrying 13-200 passengers; one vessel carrying 201-500 passengers; plus four cruise-only vessels each carrying more than 500 passengers.

1.5 Yacht (Sailing and Motor) Activities

Thirteen yachts carrying 12 or fewer tourists visited the Antarctic Treaty Area by IAATO member yacht operators during the 2011-12 season. This information is also detailed in Appendix 1. Another IAATO yacht was used only for research support this past season and so is not included in this overview.

IAATO Yacht operators' account for only 37.8 percent of the total known number of yachts visiting Antarctica during 2011-12. As in previous years, IAATO is concerned about yachts that are not authorized and whose crews may not be familiar with the Environmental Protocol and its obligations or the peculiarities of the Antarctic environment. Yacht sightings in the Antarctic Peninsula are further described in ATCM XXXV IP42 *Data Collection and Reporting on Yachting Activity in Antarctica in 2011-12*.

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

Details of the activities offered are listed in Appendix 1 and Appendix 3. All activities are approved or authorized through the Environmental Impact Assessments or operational documentation submitted in advance of the season. All activities are intended to have no more than a minor or transitory impact on the Antarctic environment and have been conducted from expedition vessels and yachts for more than a decade.

Additional information on Antarctic Peninsula activities is presented in ATCM XXXV IP37 *Report on IAATO Operator use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines, 2011-12 Season*.

1.7 Commercial Land Tourism

Three IAATO operators conducted land tourism activities during the 2011-12 season. Adventure Network International / Antarctic Logistics & Expeditions (referred to as ALE below) conducted activities for the 26th consecutive season, and The Antarctic Company (referred to as TAC below) operated in Antarctica for the seventh consecutive season and third as an IAATO operator.

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

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

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

1.7.1 Visitor & Staff Numbers

Table 3: Land Operator Client & Staff Numbers

Operator	Clients	Staff & Guides *
ALE	348	134
TAC	111	9
WDL	57	16
Total	516	159

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

1.7.2 Aircraft Operations

ALE:

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

TAC:

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

1.7.3 Traverses

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

1.7.4 Camps

- ALE Union Glacier Camp opened October 14, 2011 and closed February 1, 2012.
- TAC Camp opened November 4, 2011 and closed February 27, 2012.
- WDL Camp opened November 30, 2011 and closed December 24, 2011.

1.7.5 Programs and Activities

Activities included the operation of standard programs, the organization and operation of private expeditions, and logistical support of other expeditions.

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

ALE Program	Number of Participants
Emperor Penguin	9
Last Degree	104
Marathon	38
Ski Safari	2
South Pole Fly-In	51
South Pole Ski – Hercules Inlet	13
South Pole Ski – Amundsen	14
South Pole Ski – Messner	9
South Pole Ski – Ross Ice Shelf	10
Expeditions	16
Vehicle Expedition	2
Vinson Massif	156
Total	424

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

TAC Program	Number of Participants
Queen Maud Land Flight Excursion	16
South Pole and Emperor Penguins	13
Antarctic Marathon	2
South Pole Expeditions	91
Climbing Expeditions: Ulvetanna, Wohlthat Massif	5
Total	127

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

WDL Program	Number of Participants
Day Trip from Cape Town	44
Emperors and South Pole	15
Emperors and Mountains	14
Total	73

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

For the 2011-12 season, IAATO associate member Destination Management Chile (DMC), operating through Aerovías DAP (a non-IAATO member), conducted three separate day-trips from Punta Arenas, Chile to King George Island. A total of 102 passengers were escorted to Frei and Bellingshausen Bases and took part in Zodiac rides to Ardley Island in groups of 20 visitors at a time. Eighteen other planned trips were cancelled due to weather conditions, not meeting the minimum numbers, or other external factors.

1.9 Air Operations – Over-flights operated by IAATO Members

For the 2011-12 season, there were no over-flights of Antarctica by IAATO members.

2.0 Preliminary Estimate of Planned Activities for the 2012-13 Season

Appendix 3 illustrates a breakout of tourism categories that are projected for the 2012-13 season. According to estimates provided to IAATO by its operators (as of May 16, 2012), 22,544 seaborne and yacht (sailing and motor) passengers are expected to land in Antarctica from commercially organized vessels, 2,064 from combination air-cruise programs, and 476 on air/land expeditions during the 2011-12 season. Another 9,866 are anticipated on cruise-only programs. No over-flights by IAATO operators are expected during the 2012-13 season.

Ship-based tourism is expected to again include the operation of small auxiliary boats (Zodiac, Polar Circle Boat, R.I.B, Naiad, etc.), shore landings, kayaking, mountain climbing, running events, SCUBA diving, skiing, snowboarding, camping, helicopter operations and use of underwater ROVs.

Following four years of declining passenger numbers to Antarctica due to the effects of the worldwide economic slowdown and, more recently, the ban on HFO in Antarctic waters, tourism is expected to increase during the 2012-13 season, with an estimated 34,950 Antarctic passengers and clients overall carried by IAATO operators. The increase is expected from the following categories of Antarctic tourism:

- An 11.2 percent increase in passengers aboard the traditional seaborne category (with landings) due primarily to three voyages from a new category 2 vessel (201-500 passengers) operator and three voyages from another category 2 vessel operator who has not been active for the past two seasons.
- An increase from 860 passengers in the air / cruise category to 2,064, representing 5.9 percent of the overall Antarctic tourism market carried by IAATO operators. This increase is due, in part, to the IAATO operator with ten-years of experience of air/cruise operations doubling their operations from one to two six-week sets of operation in Antarctic waters (leaving the Treaty Area for bunkering, and re-supply between these two periods of operation).
- An increase from five to seven voyages by vessels in the cruise-only category (500-plus passengers), with a corresponding increase in passengers from 4,872 to 9,866.

Demand to visit Antarctica is expected to continue, and IAATO members will 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 2012-13 season, can be found in Appendix 2 of this paper.

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)

¹ As Aerovías DAP, which is not an IAATO member, was the operator of record for these 102 passengers, they are not included in the overall statistics in the Overview addendum.

- Tourists by Nationality (Air and Cruise)
- Tourists by Nationality (All)
- Tourist Nationalities by Vessel
- Trends 1992-2012
- Number of Visitors (tourists, staff, crew) per site per vessel-All Antarctic Sites
- Number of Visitors (tourists, staff, crew) per Site per Vessel-Continental Sites
- Number of Tourists per Site Per Vessel-All Antarctic Sites
- Number of Tourists per Site per Vessel
- Number of Tourists per Site Per Vessel-Peninsula Sites
- Number of Visits per Site per Activity.

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

Appendices:

- Appendix 1: Overview of Antarctic Tourism 2011-12;
- Appendix 2: Histogram of 1992-2013 Antarctic Tourist Trends – Landed Passengers, including ship and land passenger numbers;
- Appendix 3: Preliminary Estimate of Antarctic Tourism 2012-13

Appendix 1: Overview of Antarctic Tourism 2011-12

Based on Information provided by IAATO Members to the IAATO Secretariat as of May 18, 2012

IAATO Members Seaborne Tourism – Peninsula Region 2011-12

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	100	10	932	small boat, camping, kayaking
<i>Akademik Sergey Vavilov</i>	Russia	Quark Expeditions	United States	104	10	966	small boat, camping, climbing, kayaking, skiing
<i>Antarctic Dream</i>	Honduras	Antarctic Shipping	Chile	78	9	519	small boat, kayaking
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	48	4	157	small boat
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	6	796	small boat
<i>Clipper Adventurer</i>	Bahamas	Quark Expeditions	United States	119	7	802	small boat, skiing
<i>Clipper Adventurer</i>	Bahamas	Zegrahm Expeditions	United States	118	2	145	small boat
<i>Corinthian II</i>	Marshall Islands	Travel Dynamics	United States	100	11	1121	small boat
<i>Expedition</i>	Liberia	G Adventures	Canada	126	12	1476	small boat, camping, kayaking
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	318	10	2113	small boat, camping
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	184	4	600	small boat
<i>L'Austral</i>	France	Compagnie Des Iles Du Ponant	France	264	7	1186	small boat
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	264	3	564	small boat
<i>Le Boreal</i>	France	Compagnie Des Iles Du Ponant	France	264	5	901	small boat
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	148	10	1500	small boat, kayaking, ROV, SCUBA diving
<i>Ocean Nova</i>	Bahamas	Polar Quest	Sweden	72	1	67	small boat
<i>Ocean Nova</i>	Bahamas	Quark Expeditions	United States	72	6	434	small boat, camping, kayaking
<i>Ortelius</i>	Cyprus	Cheesemans' Ecology Safaris	United States	133	1	95	small boat
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	133	2	118	small boat
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	114	12	1198	small boat, camping, climbing, kayaking, SCUBA diving
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	54	8	387	small boat, camping, climbing, kayaking, SCUBA diving
<i>Sea Spirit</i>	Bahamas	Quark Expeditions	United States	120	10	1015	small boat, camping, kayaking
<i>Silver Explorer</i>	Bahamas	Silversea Cruises	United States	132	8	974	small boat
<i>Ushuaia</i>	Comoros	Antarpply Expeditions	Argentina	84	14	1136	small boat
<i>Ushuaia</i>	Comoros	Students on Ice	Canada	84	1	67	small boat
Total					173	19269	

IAATO Members Air/Cruise Tourism – Peninsula Region 2011-12

Air/Cruise	Vessel Registry	Operator / Charterer	Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<i>Antarctic Dream</i>	Honduras	Antarctic Shipping	Chile	78	4	207	small boat
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	68	9	546	small boat
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	54	2	107	small boat, kayaking
Total					15	860	

IAATO Member Yachts (all regions) 2011-12

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	13	small boat, kayaking
<i>Deniki</i>	Cayman Islands	High Latitudes	United Kingdom	8	1	8	small boat
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	10	2	11	small boat
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	3	34	small boat, kayaking
<i>Hanse Hansson</i>	United Kingdom	Golden Fleece Expeditions	UK Overseas Territory	12	3	26	small boat
<i>Happy Taurus</i>	United Kingdom	Sterna Corporation	United Kingdom	6	1	2	small boat
<i>Kotick</i>	Antigua	Kotick Charters, Ltd.	France	5	2	11	small boat
<i>Paradise</i>	France	Paradise Adventures	France	9	2	15	small boat, camping, skiing
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	12	2	13	small boat, kayak, climbing, SCUBA diving, skiing
<i>Podorange</i>	United Kingdom, UK	Voile Australe	France	9	3	21	small boat, skiing
<i>Santa Maria Australis</i>	Germany	Sea and Ice Mountain Expeditions	Chile	9	3	26	small boat, climbing, kayaking
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	7	3	19	small boat, camping, climbing, kayaking, skiing
<i>Vaiheré</i>	Belgium	Latitude Océane	Belgium	10	3	30	small boat
Total					30	229	

IAATO Large Ships Cruise-Only/Peninsula 2011-12

Vessels	Vessel Registry	Operator / Charterer	Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
Cruise Only							
<i>Azamara Journey</i>	Malta	Celebrity/Royal Caribbean	United States	700	1	485	Cruise Only
<i>Amsterdam</i>	Netherlands	Holland America	United States	1380	1	1030	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	830	1	716	Cruise Only
<i>Veendam</i>	Netherlands	Holland America	United States	1,350	2	2641	Cruise Only
Total					5	4872	

IAATO Members Seaborne Tourism – Continental/Ross Sea 2011-12

Vessels	Vessel Registry	Operator / Charterer	Country	Intended Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<i>Akademik Shokalskiy</i>	Russia	Aurora Expeditions	Australia	50	3	147	small boat
<i>Kapitan Khlebnikov</i>	Russia	Quark Expeditions	United States	112	2	192	small boat, helicopter landing
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	100	3	285	small boat
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	50	3	149	small boat
Total					11	773	

IAATO Members Air /Land Tourism 2011-12

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	348	aircraft landing, camping, climbing, marathon, skiing,
<i>The Antarctic Company (TAC)</i>	Varies	Filchner Ice Shelf, South Pole	Ilyushin-76, DC3 Basler	unknown	111	aircraft landing, camping, climbing, hiking, marathon, skiing
<i>White Desert</i>	United Kingdom	The Antarctic Company (TAC)	Coordinated through TAC	unknown	57	camping, climbing, skiing
Total					516	

**SUMMARY OF ACTUALS for 2011-12 SEASON
(All Tourist Types)**

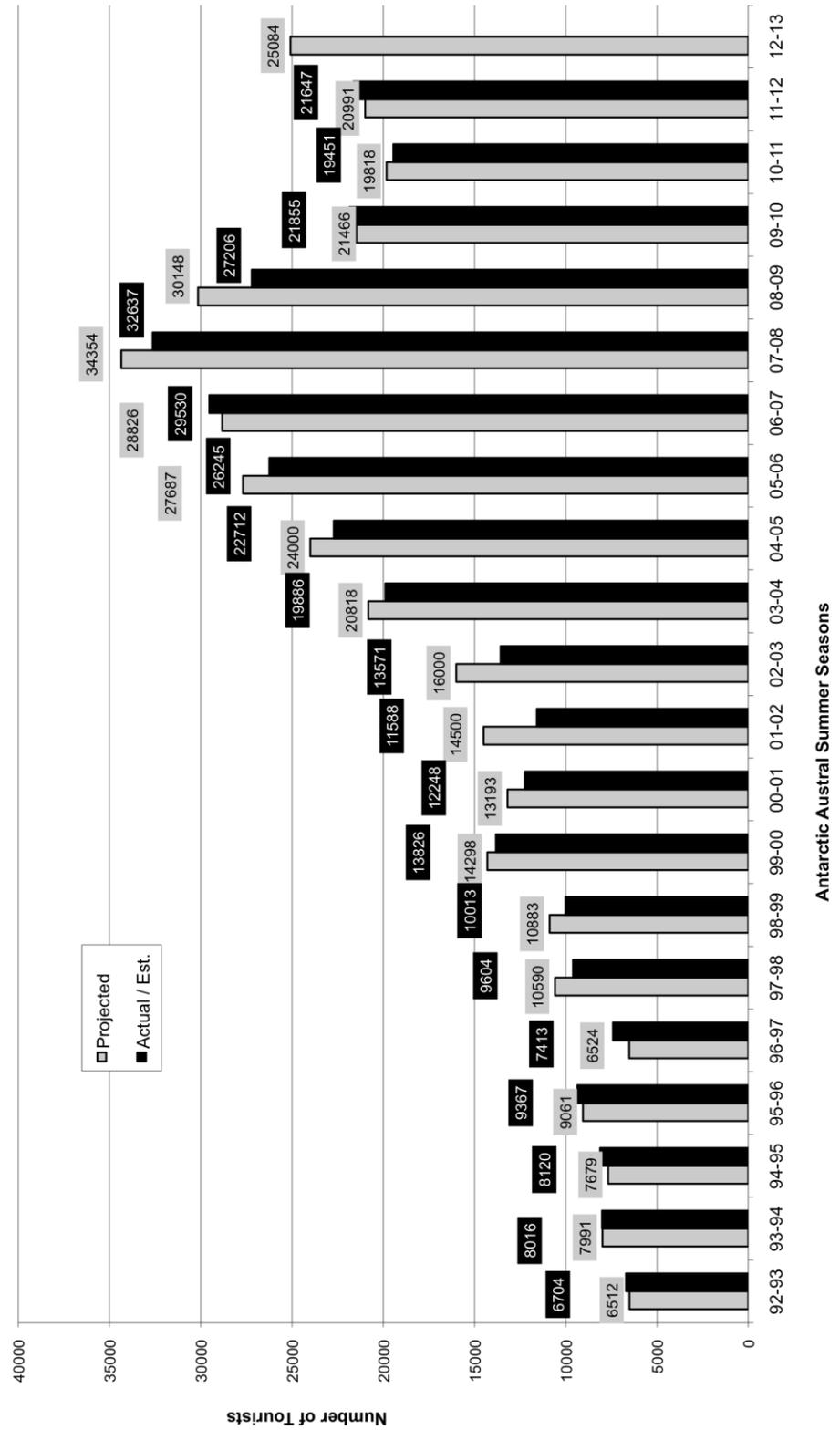
Types of Tourism	Number of Vessels	Number of Departures	Total Number of Passengers
IAATO Seaborne, Landed/Peninsula	20	173	19,269
IAATO Seaborne, Landed/Ross Sea-Continental	4	11	773
IAATO Sailing Vessels/Yachts	13	30	229
IAATO Air-Cruise/Peninsula	3	15	860
IAATO Large Ships Cruise-Only/Peninsula	4	5	4,872
IAATO Air/Land Tourism			516
IAATO Air Over-flights/Peninsula			0
TOTAL	41*	234	26,519

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

Total Visitors for 2011-12 Season:	
Seaborne Traditional Tourism (with landings)	20,271
Seaborne Tourism Cruise-Only (no landings)	4,872
Air/Cruise	860
Air/Land Tourism	516
Over-flights (no landing)	0
Total	26,519

Appendix 2

1992-2013 ANTARCTIC TOURIST TRENDS - Landed Passengers
 Includes Ship and Air/Land passenger numbers.
 1997-98 onwards includes some small sailing yachts or motor vessels
 May 17, 2012



Appendix 3: Preliminary Estimate of Antarctic Tourism 2012-2013
Based on Information provided by IAATO Members to the IAATO Secretariat as of May 18, 2012

IAATO Members Seaborne Tourism – Peninsula Region 2012-13

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	9	68	612	small boat, camping, kayaking
<i>Akademik Ioffe</i>	Russia	Cheesemans' Ecology Safaris	United States	127	95	1	95	95	small boat, camping, climbing, kayaking, skiing
<i>Akademik Sergey Vavilov</i>	Russia	One Ocean Expeditions	Canada	122	93	10	63	630	small boat, camping, kayaking
<i>Antarctic Dream</i>	Honduras	Antarctic Shipping	Chile	92	80	7	60	420	small boat, kayaking, running event
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	48	43	5	36	180	small boat
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	150	5	130	650	small boat
<i>Clipper Adventurer</i>	Bahamas	Quark Expeditions	United States	141	120	8	108	864	small boat, skiing
<i>Clipper Adventurer</i>	Bahamas	Zegrahm Expeditions	United States	141	122	1	110	110	small boat
<i>Corinthian II</i>	Marshall Islands	Travel Dynamics	United States	100	80	7	80	560	small boat
<i>Delphin</i>	Bahamas	Passat Kreuzfahrten	Germany	550	350	3	300	900	small boat
<i>Expedition</i>	Liberia	G Adventures	Canada	140	92	12	92	1104	small boat, camping, kayaking
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	318	230	11	230	2530	small boat, camping
<i>Hamburg</i>	Nassau	plantours & Partner GmbH	Germany	423	360	3	320	960	small boat
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	200	184	4	160	640	small boat
<i>L'Austral</i>	France	Compagnie Des Iles Du Ponant	France	264	200	8	180	1440	small boat
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	264	185	4	185	740	small boat
<i>Le Boreal</i>	France	Compagnie Des Iles Du Ponant	France	264	200	4	180	720	small boat
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	150	148	10	140	1400	small boat, kayaking, SCUBA diving, ROV
<i>Ocean Diamond</i>	Bahamas	Quark Expeditions	United States	278	189	11	151	1661	small boat, camping, kayaking

<i>Ocean Nova</i>	Bahamas	Polar Latitudes	United States	98	84	3	60	180	small boat
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	70	4	70	280	small boat, helicopter landing
<i>Ortelius</i>	Cyprus	Cheesemans' Ecology Safaris	United States	120	95	1	95	95	small boat
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	114	80	13	80	1040	small boat, camping, climbing, kayaking, SCUBA diving
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	54	6	48	288	small boat, camping, climbing, kayaking, SCUBA diving
<i>Polar Pioneer</i>	Russia	Fathom Expeditions	Canada	56	44	1	44	44	Small boat
<i>Polar Pioneer</i>	Russia	Waterproof Expeditions	Netherlands	56	52	1	50	50	small boat, SCUBA diving
<i>Sea Spirit</i>	Bahamas	Quark Expeditions	United States	127	114	12	102	1224	small boat
<i>Silver Explorer</i>	Bahamas	Abercrombie & Kent USA, LLC	United States	132	120	1	120	120	small boat
<i>Silver Explorer</i>	Bahamas	Silversea Cruises	United States	132	130	9	115	1035	small boat
<i>Ushuaia</i>	Comoros	Antarply Expeditions	Argentina	90	84	14	70	980	small boat
Total						188		21552	

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

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Intended Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Antarctic Dream</i>	Honduras	Antarctic Shipping	Chile	92	80	8	60	480	small boat, kayaking
<i>Clipper Adventurer</i>	Bahamas	Quark Expeditions	United States	141	120	4	108	432	small boat
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	98	67	16	60	960	small boat
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	54	4	48	192	small boat, kayaking
Total						32		2064	

IAATO Member Yachts (all regions) 2012-13

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Intended Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Yachts									
<i>Australis</i>	Australia	Ocean Expeditions	Australia	9	9	4	9	36	small boat, kayaking
<i>TBD</i>		EYOS	United Kingdom	12	12	3	12	36	small boat
<i>TBD</i>		EYOS	United Kingdom	12	12	1	12	12	small boat
<i>TBD</i>		High Latitudes	United Kingdom		8	2	6	12	small boat
<i>TBD</i>		Waterproof	Netherlands		10	1	10	10	small boat, SCUBA diving
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	12	12	2	6	12	small boat
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	12	4	10	40	small boat, kayaking
<i>Hanse Explorer</i>	Antigua	Waterproof	Netherlands	12	12	1	12	12	small boat, SCUBA diving
<i>Hanse Hansson</i>	United Kingdom	Golden Fleece Expeditions	UK Overseas Territory	12	12		7	14	small boat
<i>Kotick</i>	Antigua	Kotick Charters, Ltd.	France	5	5	2	5	10	small boat
<i>Paradise</i>	France	Paradise Adventures	France	9	8	2	7	14	small boat, camping, skiing
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	6	1	5	5	small boat
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	12	12	3	8	24	small boat, climbing, kayaking
<i>Podorange</i>	United Kingdom	Voile Australe	France	9	9	3	8	24	small boat
<i>Santa Maria Australis</i>	Germany	Sea and Ice Mountain Expeditions	Chile	9	9	3	9	27	small boat, climbing, kayaking
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	7	7	3	7	21	small boat, camping, climbing, kayaking, skiing
<i>Vaiheré</i>	Belgium	Latitude Océane	Belgium	10	10	3	10	30	small boat
Total						40		339	

IAATO Large Ships Cruise Only 2012-13

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 Quest</i>	Malta	Celebrity/Royal Caribbean	United States	830	694	1	692	692	Cruise Only
<i>Celebrity Infinity</i>	Malta	Celebrity/Royal Caribbean	United States	2449	2449	2	2172	4344	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	830	830	1	780	780	Cruise Only
<i>Veendam</i>	Netherlands	Holland America	United States	1498	1498	3	1350	4050	Cruise Only
Total						7		9866	

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

Vessels	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Intended Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Bremen</i>	Bahamas	Hapag Lloyd	Germany	164	150	1	130	130	small boat
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	106	100	3	95	285	small boat
<i>Ortelius</i>	Cyprus	Oceanwide Expeditions	Netherlands	120	70	2	70	140	small boat, helicopter landing
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	58	49	2	49	98	small boat, hovercraft
Total						8		653	

IAATO Members Air/Land Tourism 2012-13

Operator	Country	Antarctic Area Visited	Aircraft Used	Est. # of Departures	Est. # Average Load	Est. # of Passengers	Activities
Adventure Network International/Antarctic Logistics and Expeditions (ALE)	United States	Ellsworth Mts., South Pole	Ilyushin-76, Twin Otter, DC3 Basler	Varies	Varies	340	aircraft landing, camping, climbing, skiing
The Antarctic Company (TAC)	Varies	Filchner Ice Shelf, South Pole, Queen Maud Land	Ilyushin-76, DC3 Basler	Varies	Varies	100	aircraft landing, camping, climbing, skiing
White Desert (WDL)	United Kingdom	Schirmacher Oasis, Filchner Ice Shelf, Queen Maud Land	Coordinated through TAC	Varies	Varies	36	camping, climbing, skiing
Total						476	

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

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

Types of Tourism	Number of Vessels	Number of Departures	Total Number of Passengers
IAATO Seaborne, Landed/Peninsula	23	188	21,552
IAATO Seaborne, Landed/Ross Sea-Continental	4	8	653
IAATO Sailing Vessels/Yachts	16	40	339
IAATO Air-Cruise/Peninsula	4	32	2,064
IAATO Large Ships Cruise-Only/Peninsula	4	7	9,866
IAATO Air/Land Tourism			476
IAATO Air Over-flights/Peninsula			0
TOTAL	45*	275	34,950

* 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 2012-13 Season:	
Seaborne Traditional Tourism (with landings)	22,544
Seaborne Tourism Cruise-Only (no landings)	9,866
Air/Cruise	2,064
Air/Land Tourism	476
Over-flights (no landing)	0
Total	34,950