



XXXIV ANTARCTIC TREATY CONSULTATIVE MEETING - BUENOS AIRES JUNE 20TH - JULY 1ST, 2011

Agenda Item:

ATCM 10

Presented by:

IAATO

Original:

English

**HCA11-INF6**

# **IAATO Overview of Antarctic Tourism: 2010-11 Season and Preliminary Estimates for the 2011-12 Season**



# IAATO Overview of Antarctic Tourism: 2010-11 Season and Preliminary Estimates for 2011-12 Antarctic Season

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

### Introduction

In its 20<sup>th</sup> anniversary year, the International Association of Antarctica Tour Operators (IAATO) is pleased to provide an overview of Antarctic tourism from IAATO member operators for the recently completed 2010-11 season and estimates for the 2011-12 season.

Compared with the total number of IAATO operator visitors for the previous 2009-10 Antarctic tourism season (36,875), the total for 2010-11 decreased to 33,824 or 8.3%. Details of the 2010-11 season can be found in Appendix 1 of this paper.

Estimates for the 2011-12 season can be found in Appendix 3 of this paper. These estimates indicate a total of 25,319 visitors, a decrease of 25.1% from the total number for the 2010-11 season just ended.

This decrease in the number of estimated visitors for the 2011-12 season is primarily due to the withdrawal from the market of several IAATO members that operate cruise-only programs that are affected by amendments to the International Maritime Organization (IMO) MARPOL Annex I that bans the use and carriage of Heavy Fuel Oil (HFO) in the Antarctic Treaty area and comes into effect August 1, 2011.

### 1.0 Overview

#### 1.1 IAATO Member Activities

As during the past 20 seasons, IAATO membership continues to incorporate the majority of recognized Antarctic private-sector tour operators. All commercial SOLAS Passenger Ship operators conducting tourism activities in the Antarctic Treaty area are members of IAATO at the present time. All these operators have submitted Environmental Impact Assessments (Initial Environmental Evaluations or Preliminary Assessments) or operational documents as required by domestic legislation to their appropriate National Authority.

A summary of IAATO member activities for the 2010-11 season follows:

- 19,065 passengers landed from seaborne vessels in the Antarctic Treaty Area, an 11.8% decrease from the previous season. Of this total:
  - 18,021 passengers aboard traditional seaborne vessels landed in the Antarctic Peninsula area, 13% fewer than the previous season;
  - 331 passengers landed in the Ross Sea or Continental region of Antarctica, down 16.6% from the previous season;
  - 182 passengers sailed aboard yachts (sailing or motor) that carry 12 or fewer passengers to the Antarctic Peninsula area, a 1.1% increase from the previous season;
  - 531 passengers participated in air-cruise voyages in the Antarctic Peninsula area, flying from South America to King George Island to embark a vessel and cruise for six-to-nine days, making landings. This represents a 53.9% increase over the 345 passengers from the 2009-10 season. The two vessels participating in this air-cruise segment included a 62-passenger expedition vessel and a 12-passenger motor yacht.

- 14,373 passengers traveled aboard large vessels operating “cruise-only” voyages, making no landings in the Antarctic Treaty Area. This is a 4.3% decrease in the number of cruise-only passengers from the 2009-10 season.
- 386 clients participated in multi-day land expeditions in the continental interior, an increase of 153 visitors in this segment, or 65.7%.
- No passengers participated in IAATO-member over-flights to the Antarctic continent.

## 1.2 Scope of Commercial Tourist Activities for Seaborne Tourism

Commercial tourist 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 to this addendum provide further details of the scope of IAATO-member activities, including vessel/aircraft, departures, passenger numbers and activities. The appendices are as follows:

### Appendices:

- Appendix 1: Overview of Antarctic Tourism 2010-11;
- Appendix 2: Histogram of 1992-2012 Antarctic Tourist Trends – Landed Passengers, including ship-based and land passenger numbers;
- Appendix 3: Preliminary Estimate of Antarctic Tourism 2011-12

### 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

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

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

The vast majority of commercially operated voyages operate in the Antarctic Peninsula region during the six-month austral summer season (from mid-October to early April), 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 2010-11 season. Of those recorded on the Post Visit Report Forms, the majority (77%) came from 10 different countries (see Table 1).

**Table 1: Percentage of Known Passenger Nationalities**

Nationality	% of total
United States	37
Australia	10
United Kingdom	8
Germany	7
Japan	3
Netherlands	3
China	3
France	2
Switzerland	2
Argentina	2
Other	23

### 1.4 Commercial Tour Vessels Operating in 2010-11

A full list of IAATO member-operated commercial tour vessels that completed cruises to the Antarctic, including information on their registry, permitting authority and passenger capacity is given in Appendix 1. In total, there were 22 vessels carrying 13-200 passengers; two vessels carrying 201-500 passengers; plus seven cruise-only vessels each carrying more than 500 passengers.

### 1.5 Yacht (Sailing and Motor) Activities

Sixteen yachts carrying 12 or fewer passengers visited the Antarctic Treaty Area by IAATO member yacht operators during the 2010-11 season. This information is also detailed in Appendix 1.

Visits and activities by yachts not operated by IAATO members are not included in these statistics. IAATO remains concerned about visitors traveling to Antarctica aboard non-IAATO operated yachts; some of these appear not to be authorized and their crews may not be familiar with the Environmental Protocol and its obligations. Non-IAATO yachts sighted in the Antarctic Peninsula are further described in ATCM XXXIV WP020 *Data Collection and Reporting on Yachting Activity in Antarctica in 2010-11*.

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

Full details of the activities offered are listed in Appendix 1 and Appendix 3. All activities are approved 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 at least a decade.

Additional information on Antarctic Peninsula activities is presented in ATCM XXXIV IP105 *Report on IAATO Operator use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines, 2009-10 & 2010-11 Seasons*.

### 1.7 Commercial Land Tourism

Two members and one associate member that operate land tourism activities during the 2010-11 season. Adventure Network International / Antarctic Logistics & Expeditions (referred to as ALE below) conducted activities for the 25<sup>th</sup> consecutive season, and The Antarctic Company (referred to as TAC below), which operated in Antarctica for the sixth consecutive season and second as an IAATO member.

The third operator is White Desert (referred to as WDL below), which operated in Antarctica for the fifth consecutive season and first as an IAATO associate member. 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 staff and 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 2: Land Operator Visitor & Staff Numbers**

<b>Operator</b>	<b>Tourists</b>	<b>Staff &amp; Guides</b>
ALE	290	87
TAC	70	14
WDL	26	6
Total	386	107

### 1.7.2 Aircraft Operations

ALE:

- An Ilyushin-76 was used to ferry general and hazardous cargo, fuel, staff, guides and passengers from Punta Arenas to SCGC Runway 18M Union Glacier.
- One ski-equipped DHC-6 Twin Otter aircraft and two ski-equipped Douglas DC3-TP67 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 passengers from Cape Town to Novo Runway, shared with Antarctic Logistics Center International (ALCI).
- Two ski-equipped DC-3 Basler BT-67 aircraft were used for flights within Antarctica and SAR support during the Antarctic season, in conjunction with ALCI.
- One Gulfstream G2B was used to ferry WDL passengers and staff from Cape Town to Novo Runway.

### 1.7.3 Traverses

ALE:

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

TAC:

- Four vehicles (Toyota Hiluxes, modified for Antarctic travel and operated by subcontractor Arctic Trucks) were used to support passenger/cargo transportation in the area of Wohlthat Massif; the Untersee region, Gruber-Fjella; and to the South Pole.

### 1.7.4 Camps

- ALE Union Glacier Camp opened October 29, 2010 and closed February 7, 2011.
- TAC Camp opened November 3, 2010 and closed February 24, 2011.
- WDL Camp opened November 22, 2010 and closed January 8, 2011.

### 1.7.5 Programs and Activities

Activities included the operation of standard programs as well as the organization and operation of private expeditions. Note that program participant number includes both visitors and staff.

**Table 3: ALE Programs & Participant Numbers**

<b>ALE Program</b>	<b>Number of Participants</b>
Antarctic Odyssey	5
Emperor Penguin	8
Last Degree	26
Marathon	41
Ski Safari	13
South Pole Fly-In	37
South Pole Ski – Hercules	11
Vinson Massif	175
Mount Sidley	7

**Table 4: TAC Programs & Participant Numbers**

<b>TAC Program</b>	<b>Number of Participants</b>
South Pole Last Degree	4
Mountaineering Expedition to Ulvetanna, Fensriskjeften and Jorkulkirkja regions	13
Queen Maud Land Skiing Expedition	3
Kazakh South Pole Expedition	4
Extreme World Races	26
South Pole and Emperor Penguins	25
Queen Maud Land Program	2
South Pole Flight	5

**Table 5: WDL Programs & Participant Numbers**

<b>WDL Program</b>	<b>Number of Participants</b>
Camping, trekking, climbing	32

### 1.8 Air / Land Activities conducted by IAATO Members in the Antarctic Peninsula<sup>1</sup>

For the 2010-11 season, IAATO associate member Destination Management Chile (DMC), operating through Aerovias DAP, conducted two separate day-trips from Punta Arenas, Chile to King George Island. A total of 64 visitors were escorted on visits to Frei Base, with five visitors also taking Zodiac rides to Ardley Island. Eighteen other planned day-trips were cancelled due to weather or other reasons.

<sup>1</sup> As Aerovias DAP, which is not an IAATO member, was the operator of record for these 64 visitors, they are not included in the overall statistics in the Overview addendum.

### 1.9 Air Operations – Over-flights operated by IAATO Members

For the 2010-11 season, there were no over-flights of Antarctica by IAATO members.

### 2.0 Preliminary Estimate of Planned Activities for the 2011-12 Season

Appendix 3 illustrates a breakout of tourism categories that are projected for the 2011-12 season. According to estimates provided to IAATO by members, 18,913 seaborne and yacht (sailing and motor) passengers are expected to land in Antarctica from commercially organized vessels, 1,002 from combination air-cruise programs, and 508 on air/land expeditions during the 2011-12 season. Another 4,896 are anticipated on cruise-only programs. No over-flights by passengers aboard IAATO-member aircraft are expected during the 2011-12 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.

It is anticipated that air/land tourism will see a one-off season increase in tourism activities during December 2011 and January 2012 due to the Amundsen and Scott centenary celebrations at the South Pole.

### 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 2011-12 season, can be found in Appendix 2 of this paper.

While partially the result of the lingering effects on tourism from a weak worldwide economy, the overall decrease in visitor numbers over the past three seasons also reflects a decline in the mid-size category of ship-borne tourism (201-500 passengers). During the 2008-09 season, for example, five mid-size vessels conducted 26 voyages and carried 7,738 passengers. For the 2010-11 season, there were two vessels, 12 voyages and 2,574 passengers. Projections for the 2011-12 season are one vessel, 10 voyages and 2,250 passengers, respectively.

As noted in the introduction of this paper, actions taken at the IMO to ban the use and carriage of heavy fuel oil will affect the cruise-only segment of Antarctic tourism over the next few seasons. Therefore, predicting the number of tourism vessels, including cruise-only and mid-size ships, beyond the 2011-12 season is more difficult.

Nevertheless, demand to visit Antarctica is expected to continue, and growth could resume in 2012-13 and the years following, should economic conditions be favorable.

### 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 1992-2011
- 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 2010-11;
- Appendix 2: Histogram of 1992-2012 Antarctic Tourist Trends – Landed Passengers, including ship and land passenger numbers;
- Appendix 3: Preliminary Estimate of Antarctic Tourism 2011-12

## Appendix 1: Overview of Antarctic Tourism 2010-11

*Based on Information provided by IAATO Members to the IAATO Secretariat as of May 17, 2011*

### IAATO Members Seaborne Tourism – Peninsula Region – 2010-11

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<b>Traditional Vessels</b>							
<i>Akademik Ioffe</i>	Russia	Quark Expeditions	United States	110	9	927	Zodiac, camping, climbing, kayak, skiing
<i>Akademik Sergey Vavilov</i>	Russia	Quark Expeditions	United States	104	8	755	Zodiac, camping, kayak, skiing
<i>Antarctic Dream</i>	Belize	Antarctic Shipping	Chile	76	13	828	Zodiac, kayak, running event
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	43	5	187	Zodiac
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	4	515	Zodiac
<i>Clelia II</i>	Malta	Travel Dynamics	United States	100	6	518	Zodiac
<i>Expedition</i>	Liberia	GAP Adventure	Canada	120	13	1545	Zodiac, camping, kayak, skiing
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	318	10	2145	Zodiac, camping
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	188	4	593	Zodiac
<i>Kapitan Khlebnikov</i>	Russia	Quark Expeditions	United States	112	4 <sup>2</sup>	424	Zodiac, helicopter
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	264	2	381	Zodiac
<i>Le Boreal</i>	France	Compagnie Des Iles Du Ponant	France	264	5	947	Zodiac
<i>Marina Svetaeva</i>	Russia	One Ocean Expeditions	Canada	100	8	643	Zodiac, camping, kayak
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	148	10	1472	Zodiac, kayak, scuba, underwater ROV
<i>Ocean Nova</i>	Bahamas	Quark Expeditions	United States	72	5	361	Zodiac, camping, kayak
<i>Octopus</i>	Cayman Islands	Vulcan, Inc	United States	35	1	13	Zodiac, helicopter, scuba, underwater ROV
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	110	12	1225	Zodiac, camping, climbing, kayak scuba
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	54	11	532	Zodiac, camping, climbing, kayak scuba
<i>Polar Star</i>	Barbados	Polar Star Expeditions	Norway	95	8	598	Zodiac
<i>Prince Albert II</i>	Bahamas	Silversea Cruises	United States	130	9	1118	Zodiac
<i>Sea Spirit</i>	Bahamas	Quark Expeditions	United States	120	7	660	Zodiac, camping, running event
<i>Sea Spirit</i>	Bahamas	Zegrahm Expeditions	United States	120	1	101	Zodiac
<i>The World</i>	Bahamas	ResidenSea	United States	620	2	429	Zodiac, kayak
<i>Ushuaia</i>	Comoros	Antarpply Expeditions	Argentina	84	13	967	Zodiac
<i>Ushuaia</i>	Comoros	Students on Ice	Canada	84	2	137	Zodiac, skiing
<b>Total</b>					<b>172</b>	<b>18021</b>	

<sup>2</sup> One voyage of the *Kapitan Khlebnikov* was a semi-circumnavigation and so also visited Continental/Ross Sea.

## IAATO Members Air/Cruise Tourism – Peninsula Region 2010-11

Air/Cruise	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<i>Ocean Nova</i>	Bahamas	Antarctica XXI	Chile	62	9	501	Zodiac
<i>Big Fish</i>	Marshall Islands	EYOS	United Kingdom	12	3	30	Zodiac
<b>Total</b>					<b>12</b>	<b>531</b>	

## IAATO Member Yachts (all regions) 2010-11

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<b>Yachts</b>							
<i>Australis</i>	Australia	Ocean Expeditions	Australia	9	1	9	Zodiac, skiing
<i>Braveheart</i>	New Zealand	Stoney Creek Shipping	New Zealand	12	1	13	Camping, climbing
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	12	1	6	Zodiac, scuba
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	4	43	Zodiac, scuba
<i>Licorne</i>	Bermuda	High Latitudes	United Kingdom	6	1	2	Zodiac
<i>Northanger</i>	New Zealand	Seamount Expeditions	New Zealand	6	1	10	Zodiac, camping, kayak
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	1	5	Zodiac
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	12	2	14	Zodiac, camping, climbing, kayak, skiing
<i>Podorange</i>	Australia	Spirit of Sydney Expeditions	Australia	12	1	6	Zodiac, camping, climbing, kayak, skiing
<i>Santa Maria Australis</i>	Germany	Sea and Ice Mountain Expeditions	Chile	9	3	25	Zodiac, skiing
<i>Seal</i>	USA	Sterna Corporation	USA	6	1	4	Zodiac
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	8	2	12	Zodiac
<i>Vaiheré</i>	France	Latitude Océane	France	10	2	15	Zodiac
<i>UHURU</i>	UK	High Latitudes	United Kingdom	10	1	2	Zodiac, climbing, scuba
<i>Xplore</i>	Panama	Xplore Expeditions	Panama	10	2	16	Zodiac, skiing
<b>Total</b>					<b>24</b>	<b>182</b>	

## IAATO Large Ships Cruise-Only/Peninsula 2010-11

Vessels	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<b>Cruise Only</b>							
<i>Celebrity Infinity</i>	Malta	Celebrity/Royal Caribbean	United States	1,950	2	3955	Cruise Only
<i>Crystal Symphony</i>	Bahamas	Crystal Cruises	United States	940	1	816	Cruise Only
<i>Insignia</i>	Marshall Islands	Regent Seven Seas	United States	777	1	677	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	750	1	732	Cruise Only
<i>Seven Seas Mariner</i>	Bahamas	Regent Seven Seas	United States	769	1	639	Cruise Only
<i>Star Princess</i>	Bermuda	Princess Cruises	United States	2,600	2	4960	Cruise Only
<i>Veendam</i>	Netherlands	Holland America	United States	1,250	2	2594	Cruise Only
<b>Total</b>					<b>10</b>	<b>14373</b>	

IAATO Members Seaborne Tourism – Continental/Ross Sea - 2010-11<sup>3</sup>

Vessels	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Actual # Voyages	Actual # Passengers	Activities incl. landings
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	100	2	183	Zodiac
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	50	3	148	Zodiac, hovercraft
<b>Total</b>					<b>5</b>	<b>331</b>	

## IAATO Members Air/Land Tourism - 2010-11

Operator	Country	Antarctic Area Visited	Aircraft Used	Actual # Departures	Actual # Passengers	Activities
<i>Adventure Network International / Antarctic Logistics and Expeditions (ALE)</i>	United States	Ellsworth Mts., South Pole	Ilyushin-76, Twin Otter, DC3 Basler	Varies	290	Camping, climbing, skiing
<i>The Antarctic Company (TAC)</i>	Varies	Filchner Ice Shelf, South Pole, Queen Maud Land.	Ilyushin-76, DC3 Basler	6	70	Climbing, skiing, station visits
<i>White Desert</i>	United Kingdom	Schirmacher Oasis, Filchner Ice Shelf, Queen Maud Land	Ilyushin-76, DC3 Basler, Gulfstream G2B	2	26	Climbing, skiing, station visits
<b>Total</b>					<b>386</b>	

<sup>3</sup> See footnote 2 regarding *Kapitan Khlebnikov*.

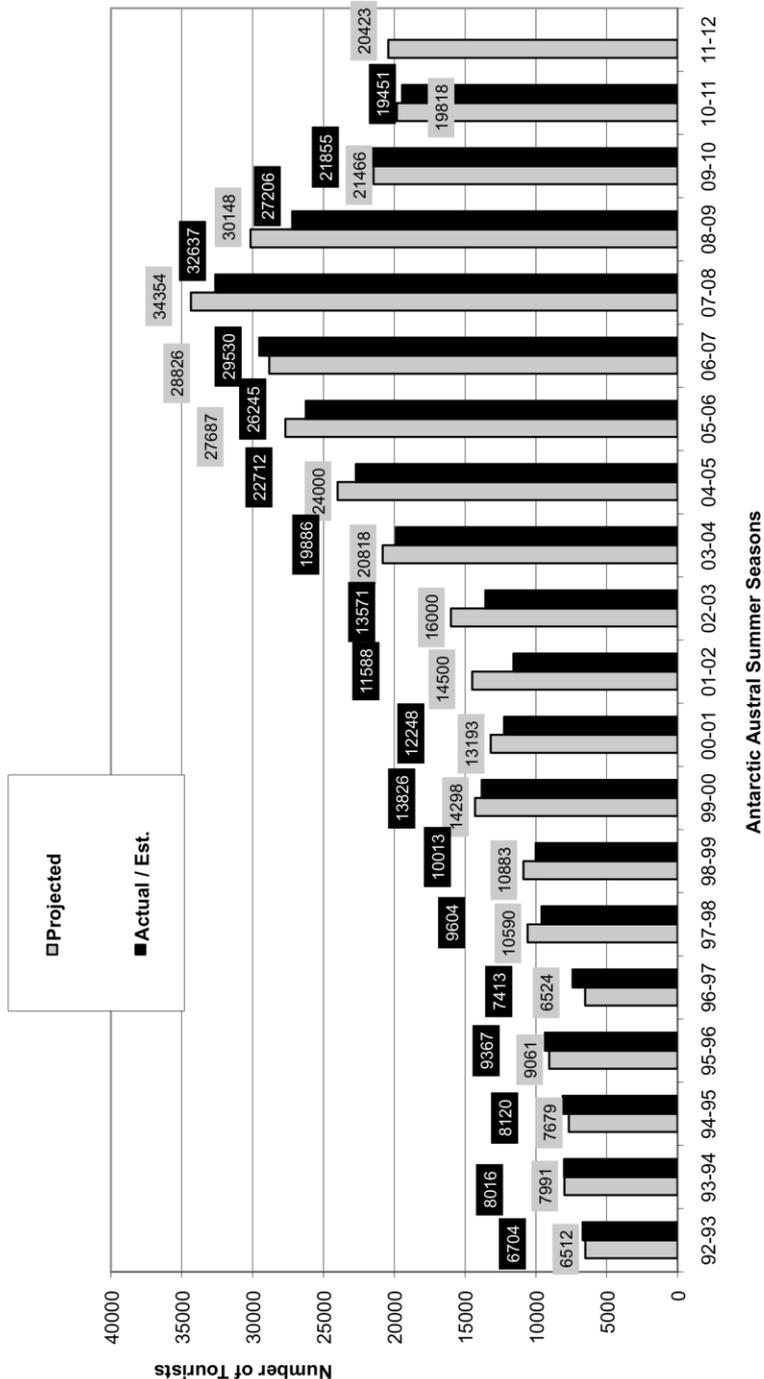
**SUMMARY OF ACTUALS for 2010-11 SEASON  
(All Tourist Types)**

<b>Types of Tourism</b>	<b>Number of Vessels</b>	<b>Number of Departures</b>	<b>Total Number of Passengers</b>
IAATO Seaborne, Landed/Peninsula	22	172	18,021
IAATO Seaborne, Landed/Ross Sea-Continental	2	5	331
IAATO Sailing Vessels/Yachts	15	24	182
IAATO Air-Cruise/Peninsula	2	12	531
IAATO Large Ships Cruise-Only/Peninsula	7	10	14,373
IAATO Air/Land			386
IAATO Air Over-flights/Peninsula		0	0
<b>TOTAL</b>			<b>33,824</b>

<b>Total Visitors for 2010-11 Season:</b>	
<b>Seaborne Traditional Tourism (with landings)</b>	<b>18,534</b>
<b>Seaborne Tourism Cruise-Only (no landings)</b>	<b>14,373</b>
<b>Air/Cruise</b>	<b>531</b>
<b>Air/Land Tourism</b>	<b>386</b>
<b>Over-flights (no landing)</b>	<b>0</b>
<b>Total</b>	<b>33,824</b>

## Appendix 2

**1992-2012 ANTARCTIC TOURIST TRENDS - Landed Passengers**  
 Includes Ship and Land passenger numbers.  
 1997-98 onwards includes some small sailing yachts or motor vessels  
 May 17, 2011



**Appendix 3: Preliminary Estimate of Antarctic Tourism 2011-2012**  
*Based on Information provided by IAATO Members to the IAATO Secretariat as of May 17, 2011*

**IAATO Members Seaborne Tourism – Peninsula Region – 2011-12**

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<b>Traditional Vessels</b>								
<i>Akademik Ioffe</i>	Russia	One Ocean Expeditions	Canada	100	10	65	650	Zodiac
<i>Akademik Sergey Vavilov</i>	Russia	Quark Expeditions	United States	104	10	90	900	Zodiac, climbing, kayak
<i>Antarctic Dream</i>	Belize	Antarctic Shipping	Chile	78	9	55	495	Zodiac
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	48	4	39	156	Zodiac
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	6	130	780	Zodiac
<i>Clipper Adventurer</i>	Bahamas	Quark Expeditions	United States	119	7	100	700	Zodiac
<i>Clipper Adventurer</i>	Bahamas	Zegrahm Expeditions	United States	118	2	110	220	Zodiac
<i>Corinthian II</i>	Malta	Travel Dynamics	United States	100	11	80	880	Zodiac
<i>Expedition</i>	Liberia	GAP Adventure	Canada	126	12	120	1440	Zodiac
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	318	10	225	2250	Polar Circle Boats
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	184	4	150	600	Zodiac
<i>L'Austral</i>	France	Compagnie Des Iles Du Ponant	France	264	7	170	1190	Zodiac
<i>Le Boreal</i>	France	Abercrombie & Kent USA, LLC	United States	264	3	190	570	Zodiac
<i>Le Boreal</i>	France	Compagnie Des Iles Du Ponant	France	264	5	170	850	Zodiac
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	148	10	135	1350	Zodiac, kayak
<i>Ocean Nova</i>	Bahamas	Quark Expeditions	United States	72	6	65	390	Zodiac
<i>Ocean Nova</i>	Bahamas	Polar Quest	United States	72	1	65	65	Zodiac
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	114	14	70	980	Zodiac, camping, kayak

## IAATO Members Seaborne Tourism – Peninsula Region – 2011-12

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<b>Traditional Vessels</b>								
<i>Polar Pioneer</i>	Russia	Fathom Expeditions	Canada	48	1	44	44	Zodiac
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	54	8	48	384	Zodiac
<i>To Be Determined</i>	<i>To Be Determined</i>	Cheesemans' Ecology Safaris	United States	TBD	1	95	95	Zodiac
<i>Sea Spirit</i>	Russia	Quark Expeditions	United States	120	9	100	900	Zodiac, camping, climbing, kayak
<i>Silver Explorer</i>	Bahamas	Silversea Cruises	United States	132	8	115	920	Zodiac
<i>Ushuaia</i>	Comoros	Antarpply Expeditions	Argentina	84	14	70	980	Zodiac
<i>Ushuaia</i>	Comoros	Students on Ice	Canada	84	1	70	70	Zodiac
<b>Total</b>					<b>173</b>		<b>17859</b>	

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

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<b>Air/Cruise</b>								
<i>Antarctic Dream</i>	Belize	Antarctic Shipping	Chile	78	6	55	330	Zodiac
<i>Ocean Nova</i>	Bahamas	Antarctica XI	Chile	68	9	64	576	Zodiac
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	54	2	48	96	Zodiac
<b>Total</b>					<b>17</b>		<b>1002</b>	

## IAATO Member Yachts (all regions) 2011-12

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<b>Yachts</b>								
<i>Australis</i>	Australia	Ocean Expeditions	Australia	9	4	9	36	Zodiac, climbing, kayak
<i>To Be Determined</i>	<i>To Be Determined</i>	EYOS	United Kingdom	12	4	12	48	Zodiac
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	10	1	6	6	Zodiac
<i>Hanse Explorer</i>	Antigua	Hanse Explorer	Germany	12	4	12	48	Zodiac
<i>Hanse Explorer</i>	Antigua	Waterproof Expeditions	Netherlands	12	1	12	12	Zodiac
<i>Happy Taurus</i>	United Kingdom	High Latitudes	United Kingdom	6	2	4	8	Zodiac, climbing, scuba
<i>Kotick</i>	Antigua	Kotick Charters, Ltd.	France	5	2	5	10	Zodiac
<i>Northanger</i>	New Zealand	Seamount Expeditions	New Zealand	6	1	5	5	Zodiac
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	1	6	6	Zodiac, climbing, scuba
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	12	2	8	16	Zodiac, climbing, kayak
<i>Podorange</i>	London, UK	Voile Australe	France	12	3	7	21	Zodiac
<i>Santa Maria Australis</i>	Germany	Sea and Ice Mountain Expeditions	Chile	9	3	8	24	Zodiac
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	8	2	6	12	Zodiac
<i>Vaiheré</i>	France	Latitude Océane	France	10	3	10	30	Zodiac
<i>Xplore</i>	Panama	Xplore Expeditions	Panama	10	2	8	16	Zodiac
<b>Total</b>					<b>35</b>		<b>298</b>	

## IAATO Large Ships Cruise-Only/Peninsula 2011-12

Vessels	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<b>Cruise Only</b>								
<i>Azamara Journey</i>	Malta	Celebrity/Royal Caribbean	United States	700	1	696	696	Cruise Only
<i>Amsterdam</i>	Netherlands	Holland America	United States	1,380	1	1,000	1,000	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	835	1	700	700	Cruise Only
<i>Veendam</i>	Netherlands	Holland America	United States	1,350	2	1,250	2,500	Cruise Only
<b>Total</b>					<b>5</b>		<b>4896</b>	

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

Vessels	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Akademik Shokalskiy</i>	Russia	Aurora Expeditions	Australia	50	3	44	132	Zodiac
<i>Kapitan Khlebnikov</i>	Russia	Quark Expeditions	United States	112	2	90	180	Zodiac, helicopter
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	100	3	98	294	Zodiac
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	50	3	50	150	Zodiac, hovercraft
<b>Total</b>					<b>11</b>		<b>756</b>	

## IAATO Members Air/Land Tourism – 2011-12

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	300	Camping, climbing, skiing
The Antarctic Company (TAC)	Varies	Filchner Ice Shelf, South Pole, Queen Maud Land	Ilyushin-76, DC3 Basler	Varies	Varies	150	Climbing, skiing
White Desert (WDL)	United Kingdom	Schirmacher Oasis, Filchner Ice Shelf, Queen Maud Land	Ilyushin-76, DC3 Basler, Gulfstream G2B	12	5	58	Climbing, skiing
<b>Total</b>						<b>508</b>	

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

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

<b>Types of Tourism</b>	<b>Number of Vessels</b>	<b>Number of Departures</b>	<b>Total Number of Passengers</b>
IAATO Seaborne, Landed/Peninsula	20	173	<b>17,859</b>
IAATO Seaborne, Landed/Ross Sea-Continental	4	11	<b>756</b>
IAATO Sailing Vessels/Yachts	14	35	<b>298</b>
IAATO Air-Cruise/Peninsula	3	17	<b>1,002</b>
IAATO Large Ships Cruise-Only/Peninsula	4	5	<b>4,896</b>
IAATO Air/Land			<b>508</b>
IAATO Air Over-flights/Peninsula		0	<b>0</b>
<b>TOTAL</b>			<b>25,319</b>

<b>Total Preliminary Visitor Estimates for 2011-12 Season:</b>	
<b>Seaborne Traditional Tourism (with landings)</b>	<b>18,913</b>
<b>Seaborne Tourism Cruise-Only (no landings)</b>	<b>4,896</b>
<b>Air/Cruise</b>	<b>1,002</b>
<b>Air/Land Tourism</b>	<b>508</b>
<b>Over-flights (no landing)</b>	<b>0</b>
<b>Total</b>	<b>25,319</b>