



ANTARCTIC TREATY  
XXI CONSULTATIVE MEETING

TRATADO ANTARTICO  
XXI REUNION CONSULTIVA

TRAITE SUR L'ANTARTIQUE  
XXIeme REUNION CONSULTATIVE

ДОГОВОР ОБ АНТАРКТИКЕ  
XXI КОНСУЛЬТАТИВНОЕ СОВЕЩАНИЕ

OVERVIEW OF ANTARCTIC TOURISM ACTIVITIES  
A SUMMARY OF 1996-1998 AND FIVE YEAR  
PROJECTION 1997-2002

*Agenda item 9*

*Submitted by LAATO*

XXI ATCM/IP75  
May, 1997  
Original: English

75

The International Association of Antarctica Tour Operators (IAATO) is pleased to provide this summary of Antarctic tourism for the 1996-97 as well as an overview of the estimated number of passengers for the 1997-98 season and preliminary five-year projection.

**1. Seaborne Tourism**

- (a) Approximately 7,322 people traveled to the Antarctic on 13 commercially-organized tour vessels from November 1996 to March 1997 -- a significant decrease from the previous year's total of 9,212. A summary is appended.
- (b) The Office of Polar Programs at the U.S. National Science Foundation distributes an annual summary of Antarctic tourism, compiled with the IAATO Secretariat.
- (c) All 13 Antarctic tour vessels that sailed in 1996-97 were operated by IAATO members. Again this season, nine were of Russian registry.
- (d) The vast majority of Antarctic voyages are to the peninsula region during the four-month Austral summer, departing from Ushuaia or, in fewer numbers, from Punta Arenas or Stanley. The Tourism Board of Tierra del Fuego has compiled statistics over the last several years. Only 7 of the 114 departures announced for 1997-98 will be outside of the Peninsula region.
- (e) The icebreaker *Kapitan Khlebnikov* successfully completed the first-ever circumnavigation of Antarctica for expedition tourism this season, November 24, 1996 - January 27, 1997, visiting 11 research stations all around the continent. A complete report on the voyage is available from the IAATO Secretariat.
- (f) Commercial Antarctic Tour Vessels, 1996-97

Ship	Capacity	Since
<i>Explorer</i>	100	1970
<i>World Discoverer</i>	138	1977
<i>Bremen</i>	164	1989
<i>Professor Molchanov</i>	38	1991
<i>Kapitan Khlebnikov</i>	114	1992
<i>Akademik Sergei Vavilov</i>	80	1992
<i>Akademik Ioffe</i>	80	1993
<i>Hanseatic</i>	180	1993
<i>Alla Tarasova</i>	120	1994
<i>Professor Khromov</i>	38	1994
<i>Akademik Shokalskiy</i>	36	1994
<i>Professor Multanovskiy</i>	45	1995
<i>Akademik Shuleykin</i>	45	1996

- (g) The average number of passengers per voyage in 1996-97 was 70 (ranging from 23 to 162) with an average carrying capacity of 91. The average carrying capacity for 1997-98 will be 133 passengers (38 to 500).



- (h) Antarctic yacht activity was addressed at the July 1996 meeting for Antarctic tour operators organized by NSF. Some 150 yacht visits have been made to Antarctica over the past 30 years. According to statistics provided by Sally Poncet, 17 yachts made 22 expeditions to Antarctica during the 1995-96 season, carrying 150 people, including 123 fare-paying passengers.
- (i) According to information provided by tour operators to the IAATO Secretariat, 114 voyages are planned for 1997-98, which will carry an estimated 10,590 travelers on 15 vessels. Much of the increase in numbers over the 1996-97 season is due to the return of the *Marco Polo*, a tour vessel with a carrying capacity of 800 passengers. Its Florida-based operator, Orient Lines, has said that they will limit the number of passengers to 400-500 per voyage. A summary is appended.

## 2. *Land-based Tourism*

- (a) Founding IAATO-member Adventure Network International, which operates a seasonal facility at Patriot Hills, Ellsworth Mountains, brought 91 travelers and 15 staff to the Antarctic in 1996-97, its 11th Antarctic season. The camp was open from 15 October 1996 to 30 January 1997. Its expeditioners included a group of eight children from the United States, Poland and Norway as invited guests. In addition to its regular climbing programs to Vinson Massif (43), flights to the South Pole (16), and Emperor penguin camp (6).
- (b) ANI continued its logistical and emergency support for all private-expeditions, four this season. All were provided with search-and-rescue coverage by ANI. The expeditions traveled by ski from Berkner Island (Weddell Sea) via the South Pole to the Ross Sea. Borge Ousland from Norway was the first person to cross the continent not only alone but also on skis and unsupported once he began the trek. Other ski expeditions included two from Hercules Inlet to the South Pole (U.K. and France), and another from the South Pole to Berkner Island (U.K.).
- (c) Total flying time south of Punta Arenas: 192 hours for the Lockheed L-382 Hercules, 190 hours for the two DHC-6 Twin Otters and 60 hours for the Cessna 185.
- (d) ANI also served as the Emergency Contact Station for IAATO-member tour vessels in the Antarctic Peninsula. In this pilot program, ANI coordinated medical evacuation of IAATO-member passenger vessels in the Antarctic Peninsula with critically-injured or sick passengers (see IAATO Medical Emergency Contingency Plan, XX ATCM INF 76 for details). This function by ANI will continue in the 1997-98 season.
- (e) This season Polar Logistics, the logistical arm of Adventure Network International, made site surveys of a blue-ice runway near Novolazarevskaya Station (Russia) in Dronning Maud Land. Three flights were made from Cape Town in December 1996 and January 1997 employing a Lockheed Hercules L-382G aircraft. A preliminary Assessment of Environmental Impact was conducted for this activity.



- (f) The objective of the survey was to establish whether an air route to support Antarctic Treaty Parties active in this sector is a feasible and commercially viable prospect. Germany, India, South Africa, Norway, Russia and Japan all maintain research facilities in Dronning Maud Land, five of them year-round. In its first season, Polar Logistics assisted the governments of India, Norway and Russia by carrying cargo, mail or passengers. Two private expeditions were also supported.
- (g) The ice runway is near Holtedahlfjella, 200 km inland at an elevation of 1000 m above sea level. A temporary camp was established for weather reporting and reception of visitors, with a Twin Otter on standby for ongoing flights and a doctor on call. In addition, three alternate runways were surveyed.

### **3. Overflights**

- (a) Croydon Travel of Victoria, Australia operated *Qantas Antarctic Day Sightseeing* flights from Melbourne aboard Qantas Airlines Boeing 747 aircraft for the third consecutive season. A total of 3,448 passengers participated on 10 flights from 1 December 1996 to 16 February 1997 with approximately 23 crew per flight.
- (b) The activity is expected to continue at approximately the same level for next season.
- (c) In addition, Aerolineas Argentinas operates commercially scheduled "transpolar" flights between Argentina and New Zealand aboard its Boeing 747 aircraft.

### **4. Antarctic Tourism Market Forecast**

- (a) Appended to this report is a rough five-year forecast of the number of Antarctic tour operators, vessels, voyages and passengers. This preliminary projection of trends was made by the IAATO Secretariat based on a survey of IAATO members and the cruise industry.
- (b) According to current information, Antarctica is likely to remain a specialized and relatively expensive niche destination offered by a limited number of experienced operators focussing on educational voyages to areas of natural and wilderness value.
- (c) The projection is a reflection of current business development. Tour markets, however, are subject to change and with such an industry, the number of travelers would vary greatly with a small change in the number of tour operators or available ships.



## Overview of Actual Seaborne Antarctic Tourism, 1996-1997

(based on information provided to IAATO and the U.S. National Science Foundation by Antarctic tour operators as of 8 April 1997, including all landings, station visits and zodiac cruises within the Antarctic Treaty Area)

Vessel	Operator/Charterer	Total # Voyages	Total # Passengers	Total # Landings
<i>Explorer</i>	Abercrombie & Kent/ Explorer Shipping	9	707	109
<i>Professor Molchanov</i>	Aurora Expeditions <sup>4</sup>	7	305	90
<i>Professor Molchanov</i>	Quark Expeditions	1	27	11
<i>Professor Multanovskiy</i>	Mountain Travel-Sobek	4	147	26
<i>Professor Multanovskiy</i>	Marine Expeditions <sup>7</sup>	6	227	49
<i>World Discoverer</i>	Society Expeditions	8	888	89
<i>World Discoverer</i>	Zegrahm Expeditions	1	129	12
<i>Alla Tarasova</i>	Quark Expeditions <sup>5</sup>	2	189	25
<i>Alla Tarasova</i>	Marine Expeditions <sup>9</sup>	9	759	73
<i>Kapitan Khlebnikov</i>	Zegrahm Expeditions <sup>1</sup>	1	88	5
<i>Kapitan Khlebnikov</i>	Quark Expeditions <sup>2</sup>	2	165	55
<i>Professor Khromov</i>	Quark Expeditions	7	260	52
<i>Professor Khromov</i>	Adventure Network Intl	1	36	15
<i>Akademik Shokalskiy</i>	Southern Heritage Expeditions	3	109	17
<i>Hanseatic</i>	Hanseatic Cruises	5	781	44
<i>Bremen</i>	Hanseatic Cruises <sup>3</sup>	1	125	6
<i>Bremen</i>	Quark Expeditions	1	163	8
<i>Akademik Ioffe</i>	Marine Expeditions <sup>10</sup>	13	879	95
<i>Akademik Vavilov</i>	Marine Expeditions <sup>8</sup>	10	731	65
<i>Akademik Vavilov</i>	Quark Expeditions <sup>6</sup>	3	224	26
<i>Akademik Shuleykin</i>	Marine Expeditions	10	383	74
<b>TOTALS</b>		<b>104</b>	<b>7,322</b>	<b>946</b>

<sup>1</sup> including 9 passengers booked by Quark Expeditions and 1 passenger by WildWings

<sup>2</sup> including 13 Zegrahm passengers on 24 Nov and 2 WildWings passengers on 27 Jan departure

<sup>3</sup> including 13 passengers booked by Quark Expeditions

<sup>4</sup> including 22 Quark Expeditions' passengers on various voyages

<sup>5</sup> including 21 passengers booked by Zegrahm Expeditions on the 28 Dec voyage

<sup>6</sup> including 44 passengers booked by Aurora Expeditions and 24 by WildWings

<sup>7</sup> including a 7 Nov subcharter by Svalbard Polar Travel with 38 passengers

<sup>8</sup> including a 2 Dec subcharter by Marathon Tours & Travel with 74 passengers

<sup>9</sup> including three subcharters by IAATO-Member JES with a total of 184 passengers

<sup>10</sup> including subcharters by Playguide (3), Marathon Tours & Travel (1) and Aventyrsresor (1)



## Preliminary Estimate of Seaborne Antarctic Tourism, 1997-98

(Based on information provided by members to the IAATO Secretariat as of April 7, 1997)

Vessel	Operator/Charterer	Passenger Capacity	Probable # Voyages	Estimated Ave. Load	Probable # Passengers
<i>Explorer</i>	Explorer Shipping	100	9	78	702
<i>Kapitan Khlebnikov</i>	Zegrahm Expeditions	114	1	90	90
<i>Kapitan Khlebnikov</i>	Quark Expeditions	114	1	110	110
<i>Kapitan Khlebnikov</i>	Aurora Expeditions	114	1	110	110
<i>Akademik Golitsyn</i>	Quark Expeditions	48	7	40	240
<i>Akademik Golitsyn</i>	Southern Heritage Exp	48	1	45	45
<i>Professor Molchanov</i>	Aurora Expeditions <sup>1</sup>	48	6	45	270
<i>Professor Molchanov</i>	Quark Expeditions	48	3	45	135
<i>Akademik Shokalskiy</i>	Southern Heritage Exp.	38	3	38	114
<i>World Discoverer</i>	Zegrahm Expeditions	138	1	120	120
<i>World Discoverer</i>	Society Expeditions	138	8	120	960
<i>Bremen</i>	Quark Expeditions	164	1	155	155
<i>Bremen</i>	Hapag-Lloyd Cruise Management GmbH <sup>2</sup>	164	6	140	840
<i>Hanseatic</i>	Hapag-Lloyd Cruise Management GmbH	180	5	150	750
<i>Akademik Ioffe</i>	Marine Expeditions	80	11	70	770
<i>Akademik Vavilov</i>	Marine Expeditions	80	11	75	825
<i>Professor Multanovskiy</i>	Marine Expeditions	40	6	35	210
<i>Professor Multanovskiy</i>	Mt. Travel-Sobek	40	4	33	132
<i>Akademik Shuleykin</i>	Marine Expeditions	45	11	40	440
<i>Ala Tarasova</i>	Marine Expeditions	120	12	96	1152
<i>Marco Polo</i>	Orient Lines <sup>3</sup>	800	4	465	1860
<i>Vista Mar</i>	plantours & partner <sup>4</sup>	300	2	280	560
<b>TOTALS</b>		<b>Ave = 133</b>	<b>114</b>	<b>Ave = 93</b>	<b>10,590</b>

1 Formerly doing business as GMMY Pty Ltd

2 Formerly doing business as Hanseatic Tours (now part of Hapag-Lloyd)

3 Not a member of IAATO (due to number of passengers carried). Limited to approx. 500 passengers.

4 Not currently a member of IAATO, application pending



## IAATO Five-Year Forecast: Seaborne Antarctic Tourism, 1997-2002

This rough five-year forecast of commercially-organized shipborne tourism is based on a survey of planned activities by existing and known prospective Antarctic tour operators by the IAATO Secretariat. While tourism markets are difficult to predict, these numbers reflect current business development in a small industry. It assumes that appropriate Russian-flag vessels will continue to be available to operators at a favorable charter rate, that the regulatory environment will remain largely unchanged, and that large cruise lines will not enter the market. None of the world cruise lines contacted expressed interest in future Antarctic voyages due to operational and marketing considerations.

These numbers should be interpreted with extreme caution since a change in one or two key operators would significantly modify the prediction of the number of ships, voyages and passengers. At present, one small company (Marine Expeditions) carries approximately 40% of Antarctic shipborne tourism. All current operators have announced that they will continue at approximately the same levels as the 1997-98 season for the next five years. This forecast includes preliminary projections for three new companies, each planning to operate a 100-150 passenger ship in the Antarctic starting in 1998-99.

Based on current information, it is predicted that Antarctica will remain a specialized and relatively expensive niche destination offered by a limited number of experienced operators focussing on educational voyages to areas of exceptional natural history and wilderness value.

Year	# Operators	# Ships	# Voyages	# Passengers
<i>ACTUAL:</i>				
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
<i>FORECAST:</i>				
1997-98	12	15	114	10,590
1998-99	15	17	145	12,300
2000-01	16	16	150	14,050
2001-02	15	17	155	14,250
2002-03	16	17	154	13,400



A member organization  
founded in 1991 to  
advocate, promote and  
practice safe and environ-  
mentally responsible private-  
sector travel to the Antarctic.

## ANTARCTIC SHIPBORNE TOURISM, 1995-96

### ACTUAL IAATO SHIP TOURS • ANTARCTICA, 1995-1996

VESSEL	OPERATOR	VOYAGES	PAX	LANDINGS
<i>Explorer</i>	Explorer Shipping	10	714	114
<i>World Discoverer</i>	Society Expeditions	8	901	92
<i>World Discoverer</i>	Zegrahm Expeditions	1	87	13
<i>Kapitan Khlebnikov</i>	Zegrahm Expeditions	1	92	3
<i>Kapitan Khlebnikov</i>	Quark Expeditions	4	403	43
<i>Alla Tarasova</i>	Quark Expeditions	6	601	68
<i>Alla Tarasova</i>	GMMS, Pty Ltd.	1	97	10
<i>Professor Khromov</i>	Quark Expeditions	5	157	70
<i>Professor Khromov</i>	GMMS, Pty Ltd	3	112	29
<i>Professor Molchanov</i>	Quark Expeditions	6	192	66
<i>Professor Molchanov</i>	GMMS, Pty Ltd	1	34	13
<i>Hanseatic</i>	Hanseatic Tours	5	707	30
<i>Bremen</i>	Hanseatic Tours	4	539	45
<i>Akademik Ioffe</i>	Marine Expeditions	13	1,005	86
<i>Akademik S. Vavilov</i>	Marine Expeditions	12	867	93
<i>Livonia</i>	Marine Expeditions	3	110	27
<i>Livonia</i>	Mountain Travel-Sobek	4	141	30
<i>Akademik B. Petrov</i>	Marine Expeditions	10	381	91
<i>Akademik Multanovskiy</i>	Marine Expeditions	10	368	65
<i>Akademik Shokalskiy</i>	Southern Heritage Expeditions	3	104	15
<i>Marco Polo</i>	Orient Line	4	1,687	17
<b>Totals</b>		<b>113</b>	<b>9,212</b>	<b>1,007</b>





A member organization  
founded in 1991 to advocate,  
promote and practice safe  
and environmentally  
responsible private-sector  
travel to the Antarctic.

## MEMBERSHIP DIRECTORY

May 1997

### Office of the Secretariat

111 East 14 Street  
Suite 110  
New York, NY 10003 USA  
Darrel Schoeling  
Tel: 212 460 8715  
Fax: 212 529 8684  
E-mail: IAATO@aol.com

### Spokesperson

235 Camden, Suite 32  
Rockland, ME 04841 USA  
John Spletstoesser  
Tel: 207 594 7594  
Fax: 207 594 7594

### MEMBERS

#### Abercrombie & Kent / Explorer Shipping Corporation

1520 Kensington Road  
Oak Brook IL 60521 USA  
Victoria Underwood  
Tel: 630 954 2944  
Fax: 630 572 1833

#### Adventure Network International

Canon House  
27 London End  
Beaconsfield, Bucks  
HP9 2HN United Kingdom  
Anne Kershaw  
Tel: (44) 1494 671808  
Fax: (44) 1494 671725  
E-mail: 106256.1300@compuserve.com

#### Aurora Expeditions

Level 1, 37 George Street  
The Rocks Sydney NSW Aus-  
tralia 2000  
Greg Mortimer  
Tel: (61) 2 9252 1033  
Fax: (61) 2 9252 1373  
E-mail:  
Auroraex@world.net

#### Hapag-Lloyd Cruiseship Management GmbH

Ballindamm 25  
20020 Hamburg  
Germany  
Bärbel Krämer  
Tel: (49) 40 3001 4600  
Fax: (49) 40 3001 4601  
E-mail: baerbel\_  
kraemer@hanseaticcruises.cc  
mail.co

### Marine Expeditions

30 Hazelton Avenue  
Toronto, Ontario  
M5R 2E1 Canada  
Patrick Shaw  
Tel: 416 964 9069  
Fax: 416 964 2366

### Mountain Travel • Sobek

6420 Fairmount Avenue  
El Cerrito, CA 94530 USA  
Alicia Zablocki  
Tel: 510 527 8105  
Fax: 510 525 7710  
E-mail: info@MtSobek.com  
http://www.  
MtSobek.com

### Quark Expeditions

980 Post Road  
Darien CT 06820 USA  
Denise Landau  
Tel: 203 656 0499  
Fax: 203 655 6623  
E-mail: 76255.3266@compuserve.com  
http://www.  
quark-expeditions.com

### Society Expeditions

2001 Western Avenue  
Suite 710  
Seattle, WA 98121 USA  
John Tillotson  
Tel: 206 728 9400  
Fax: 206 728 2301

### Southern Heritage Expeditions

PO Box 20-219  
Christchurch  
New Zealand  
Rodney Russ  
Tel: (64) 03 359 7711  
Fax: (64) 03 359 3311  
E-mail: hertexp@ibm.net

### Travel Dynamics

132 East 70 Street  
New York, NY 10021 USA  
Jim Smith  
Tel: 212 517 7555  
Fax: 212 517 0077  
E-mail: info@travdyn.com

### WildWings

International House  
Bank Road, Bristol  
BS15 2LX Avon  
United Kingdom  
John Brodie-Good  
Tel: (44) 117 9848040  
Fax: (44) 117 9674444

### Zegrahm Expeditions

1414 Dexter Avenue  
Suite 327  
Seattle, WA 98109 USA  
Werner Zehnder  
Tel: 206 285 4000  
Fax: 206 285 5037  
E-mail: zoe@zeco.com  
http://www.zeco.co

### ASSOCIATE MEMBERS

#### Hapag Lloyd Tours GmbH

Schwachhauser  
Heerstrasse, 30a  
28209 Bremen  
Germany  
Isolde Susset  
Tel: (49) 421 34 86 131  
Fax: (49) 421 34 86 132

#### JES / Japan Euro-Asia Service

9-3 Rokubancho  
Chiyoda-ku, Tokyo 102 Japan  
Matsui Sadaaki  
Tel: (81) 3 3221 9121  
Fax: (81) 3 3221 9120

#### Latour Chile

Fidel Oteiza 1933  
Providencia, Santiago Chile  
Mike Gallegos  
Tel: (56) 2 225 2883  
Fax: (56) 2 225 2545

#### LifeLong Learning

101 Columbia  
Suite 150  
Aliso Viejo, CA 92656 USA  
J. William Diebenow  
Tel: 714 362 2900  
Fax: 714 362 2075  
E-mail: llxpro@aol.com

### Natural Habitat Adventures

2945 Center Green Ct  
Boulder, CO 80301 USA  
Sean Jones  
Tel: 303 449 3711  
Fax: 303 449 3712  
E-mail: nat@nathab.com  
http://www.nathab.com

### Oceanic Adventures

Two Jays, Kemple End  
Stonyhurst, Lancashire  
BB7 9QY United Kingdom  
Mark Beaman  
Tel: (44) 1254 826116  
Fax: (44) 1254 826780  
E-mail:  
ocean@birdquest.co.uk

### Overseas Adventure Travel

625 Mt. Auburn Street  
Cambridge, MA 02138 USA  
Robin Price  
Tel: 617 876 0533  
Fax: 617 876 0455

### Park East Tours

1841 Broadway  
New York, NY 10023 USA  
Eric Gordon  
Tel: 212 765 4870  
Fax: 212 265 8952

### Plancius - Oceanwide

Rapenburgerstraat 109  
1011 VL Amsterdam  
The Netherlands  
J. de Korte  
Tel: (31) 20 4221411  
Fax: (31) 20 4222126

### Playguide Tours

Mandai Bldg  
4-4 Kojimachi  
Chiyoda-ku, Tokyo 102 Japan  
Tenshin Kobayashi  
Tel: (81) 3 3288 0911  
Fax (81) 3 3288 3391

### Radisson Seven Seas Cruises

600 Corporate Drive  
Suite 410  
Ft. Lauderdale, FL 33334 USA  
Paul Goodwin  
Tel: 954 776 6123  
Fax: 954 776 2283  
E-mail: pgoodwin@  
radisson.com