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OVERVIEW OF ANTARCTIC TOURISM

Submitted by the  
INTERNATIONAL ASSOCIATION OF  
ANTARCTICA TOUR OPERATORS (IAATO)

(Agenda Item 11)

(Submitted by IAATO)

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## IAATO Overview of Antarctic Tourism

The International Association of Antarctica Tour Operators (IAATO) is pleased to provide this summary of Antarctic tourism for the 2001-2002 season and a brief overview of Antarctic tourism trends. Additional information can be found on line at [www.iaato.org](http://www.iaato.org), including the statistics compiled annually by the Office of Polar Programs at the United States National Science Foundation.

### 1 Overview

In 2001-2002 it is estimated that 11, 588 tourists landed in the Antarctic on private sector sea borne and or land based expeditions. Tourist activities included small boat or zodiac cruising, shore landings, and to a lesser extent kayaking, mountain climbing, scuba diving, skiing, snowboarding, camping, parachuting, marathon running, helicopter and Argo expeditions. A brief summary of the season, "IAATO Overview of Antarctic Tourism, 2001-2002," is appended (Appendix A). Of these Antarctic visitors,

- 159 participated in land-based expeditions (IAATO member),
- 8073 traveled aboard commercially organized IAATO member vessels,
- 2029 traveled on board IAATO member large cruise vessel and did not land
- 2,893 traveled aboard one non-member vessel and landed tourists in the Antarctic Peninsula
- Approximately 142 traveled aboard non-IAATO member yachts or sailing vessels

One large cruise ship carried a total of 2029 tourists and operated two voyages to Antarctica but did not land tourists.

All tour IAATO member and non-IAATO member companies have submitted Initial Environmental Impact Assessments (IEE's).

All commercial tour companies are located in Contracting Party States. In the past there were only two companies, one of which is no longer in existence that was located in Canada. Both Canadian companies have submitted IEE's in the past and have followed existing Antarctic Treaty and in most cases exceeded the domestic requirements

### 2 Seaborne Tourism

2.1 11,429 tourists landed in the Antarctic on 19 commercially organized tour vessels plus sailing vessels and or yachts from November 2001 to March 2002, representing a 6.7% decrease over the 2000-2001-season total of 12,248 ship-based visitors. For the last two year 2000-2001 and 2001-2002 sea borne tourism with landings have actually decreased since the millennium peak.

One large cruise vessel visited Antarctica twice for a 72 hour time period each time and carried 2029 tourists to the Antarctic Peninsula.

Overall numbers have been separated noting the diversification of activities.

2.2 IAATO members operated all but one of the Antarctic tour vessels that sailed in 2001 – 2002. The non-IAATO vessel *Marco Polo* (Orient Lines is the parent company) has been operating in Antarctica since 1993. (IAATO's Bylaws state that vessels carrying more than 500 passengers cannot land and that stringent landing restrictions could be placed on vessels over 200 passengers at specific landing sites if necessary due to environmental considerations. *Marco Polo* plans to carry more than 500 passengers.)

2.3 The vast majority of Antarctic voyages are to the Peninsula region during the five-month Austral summer season (November – March), departing from Ushuaia, Argentina, or, to a lesser extent, from Punta Arenas, Chile or Port Stanley, Falkland Islands. Of approximately 137 ship and yacht voyages during the 2001-2002 season, 111 voyages visited the Antarctic Peninsula region; 6 visited the Ross Sea/Continental area. A breakdown of the tourist activities follows.

2.4 Region visited	Activity	Number of Voyages	Number of Persons
Peninsula only	landings	109	10,966
Peninsula only	no landings	2	2029
Peninsula/sailing vessels	landings	28*	142*
Ross Sea/Continental	landings	6	321
Land based/Interior	land based	n/a	159

\*This is an estimate based on incomplete information from sailing vessel/yacht operators

## 2.5 Commercial Antarctic Tour Vessels, 2001-2002

Ship	Registry	Passenger Capacity	Operating in Antarctica Since
<i>Explorer</i>	Liberia	96	1970
<i>Bremen (ex Frontier Spirit)</i>	Bahamas	164	1989
<i>Professor Molchanov</i>	Russia	52	1991
<i>S/Y Pelagic</i>	United Kingdom	6	1991
<i>Kapitan Khlebnikov</i>	Russia	108	1992
<i>Kapitan Dranitsyn</i>	Russia	100	1993
<i>Akademik Ioffe</i>	Russia	117	1993
<i>Hanseatic</i>	Bahamas	180	1993
<i>Marco Polo</i> (non IAATO member)*	Bahamas	800	1993
<i>Clipper Adventurer**</i>	Bahamas	120	1994
<i>Akademik Shokalskiy</i>	Russia	46	1994
<i>Professor Multanovskiy</i>	Russia	52	1995
<i>Endeavour****</i>	Bahamas	110	1998
<i>Grigoriy Mikheev</i>	Russia	46	1999
<i>Vista Mar</i>	Panama	280	periodically since 1991
<i>Sir Hubert Wilkins</i>	Vanuatu	12	2000
<i>Polar Pioneer***</i>	Russia	54	2001
<i>Polar Star</i>	Barbados	100	2001
<i>Ryndam</i>	Netherlands	1200	2002

- \* *Marco Polo*: Not a member of IAATO. Capacity limited by operator (Orient Lines) to 500-600 passengers
- \*\* Formerly *ex Alla Tarasova*
- \*\*\* Formerly *Akademik Shuleykin*
- \*\*\*\* Formerly *Caledonian Star*

Two IAATO member sailing vessels include the *Pelagic* and *Sir Hubert Wilkins*.

### 3 Commercial Antarctic Sailing Vessels and or Yachts (non-IAATO members)

- 3.1 Based on information received by the IAATO Secretariat, a total of 142 passengers were reported to have traveled to Antarctica aboard 18 non-IAATO commercial sailing vessels and or yachts in the 2001-2002 season. This information is compiled at Arthur Harbor by U.S. National Science Foundation staff, and by information provided to IAATO by the British Antarctic Survey staff at Port Lockroy. Sailing vessel/yacht activity information (which may be incomplete) is included in the statistical summaries and projections appended to this report, or listed on the IAATO website. IAATO has three yacht members who operate the following sailing vessels: *S/Y Pelagic*, *S/Y Golden Fleece* and *Sir Hubert Wilkins*. Antarctic sailing vessel/yacht activity is also compiled annually by Robert Headland at Scott Polar Research Institute (University of Cambridge, England) as part of the ongoing "Chronological List of Antarctic Expeditions and Related Historical Events." IAATO member *Golden Fleece* operated in South Georgia and the Falkland Islands this season.
- 3.2 Regular Commercial yachts with fare paying passengers include the *Pelagic* (IAATO Member, Pelagic Expeditions), and *Sir Hubert Wilkins* (IAATO Member, Ocean Frontiers). Others (non-IAATO members) are listed in the table "Overview of Non-IAATO Member Yachts, 2001-02."
- 3.2.1 The IAATO Secretariat is in correspondence with some of the non-member sailing vessels. Antarctic Treaty parties permitting sailing vessel/yacht operations should encourage the use of the standard Post Visit Site Report form. IAATO would like to request copies whenever possible of all Post Visit Site reports for non-member companies so that tourism data can be compiled on landing sites and overall numbers. This will also further assist in being able to compile data for use in furthering the understanding of potential cumulative impacts.

Several commercial sailing vessels/operators have approached IAATO in July 2002 and are interested in membership.

Discussions are also taking place concerning an amendment to the standard Post Visit Site Report form that would be more usable and would most likely reflect sailing vessel activities. IAATO has compiled a complete list of companies that operated during the 2001-2002 season so that national programs who are overseeing yacht activities from their respective countries assure that the Environmental Protocol requirements have been met.

### 4 Land-based Tourism--Adventure Network International

- 4.1 IAATO member Adventure Network International (ANI) operated out of Punta Arenas, Chile, for the sixteenth consecutive season. ANI carried a total of 159 land-based tourists, which included support services for private expeditions, and ANI-organized and operated expeditions. ANI also

continues to provide Emergency Medical Evacuation Response (EMER) to IAATO member vessels throughout the period that the tourist vessels are operating in the Peninsula region. ANI's operations include the following:

#### 4.2 Aircraft Operations

- One Ilyushin-76 for cargo and fuel and passengers from Punta Arenas to Patriot Hills for a total of 14 flights, 7 tourists and 7 fuel flights.
- ANI did not operate a Hercules aircraft in the interior of Antarctica
- One Twin Otter aircraft, also ski equipped was used for interior flights through the end of the Antarctic season
- One Cessna 185 on skis was also used for interior flying.

4.3 Patriot Hills Camp opened 23 November 2001 and closed January 31, 2002.

4.4 ANI provided support for the following private expeditions:

- Planetary Studies Meteorite Expedition
- The Poles Wearables Expedition (2x Swedish)

4.5	ANI organized/operated the following Expeditions	total number of people
	Expeditions/as above	12
	Vinson Massif (Self guided)	67
	South Pole fly in	61
	Ski to the South Pole	5
	Ski the last degree	5
	South Pole Marathon	6
	Antarctic Odyssey	3
	Total	159

## 5 Overflights

### Air Operations-Flight Seeing

5.1 During the 2001-2002 season, Croydon Travel of Victoria Australia operated six Antarctica day sightseeing flights from Australia - Melbourne (2), Sydney (3) and Adelaide (1) aboard a Qantas Airways Boeing 747-400 aircraft for the 8<sup>th</sup> consecutive season.

A total of 2082 tourists participated in six flights from November 2001 to February 2002 . In addition, the aircraft carried a total of 132 crew during the season. To date, Croydon has operated a total of 64 flights carrying over 22,000 tourists since commencing Antarctic operations in the 1994-1995 season.

The aircraft operate at a minimum altitude of 10,000 ft or 2,000 ft above the highest ground within 100 nautical miles. The flights operate mainly to the northern Victoria Land coast, Oates, George V and Adélie Land regions. The pilots avoid any known penguin colonies by a horizontal separation of one mile and provide a full in-flight lecture and education program utilising at least three Antarctic lecturers and at least six videos.

A comprehensive information kit is provided to passengers and “live” ground to air interviews are conducted with staff members at Australian and sometimes Italian bases. This season provided some of the clearest viewing conditions on record.

Croydon Travel expects to operate at least three flights during the 2002-2003 season to the same areas detailed from Melbourne, Sydney and Adelaide.

- 5.2 Numerous flights to the Antarctic Peninsula region operate from Punta Arenas, Chile but information on these flights has been difficult to obtain. According to IAATO sources, overflights of the Antarctic Peninsula from Punta Arenas, Chile, operate frequently from November to March, by two companies, Lan Chile and DAP. These flights are offered as an optional excursion to cruise ship passengers and independent travelers calling at Punta Arenas. Specific information is not forthcoming by either of the airlines despite numerous attempts by IAATO and other interested parties.

The flying routes vary according to weather conditions but basically are as follows:

- King George Island, Nelson, Robert, Greenwich, Livingston and Deception Island (South Shetland Islands).
- King George Island and Antarctic Peninsula crossing over to the Weddell Sea in the proximities of Seymour and James Ross Islands.

## **6 Preliminary Estimate of Planned Activities for the 2002-2003 Season**

Appendix B illustrates a breakout of tourism categories in order to clearly see the diversification of the tourist activities that will occur during the 2002-2003 season. This is an estimate based on information provided to the IAATO Secretariat. Note that most all the activities listed have occurred in the past 10 years but have not necessarily been presented in such detail. IAATO is attempting to present as much factual information as possible in order to clarify activities that have occurred, and are planned for the future.

- 6.1 According to estimates provided to IAATO by tour operators, approximately 14,000 seaborne, yacht, and land-based tourists may land in Antarctica on commercially organized tour vessels, 160 on land-based expeditions and approximately 100 on commercial yachts and or sailing vessels during the 2002-2003 season. This represents an increase from the 2001-2002 season. Appendix B provides a table outlining the diversification of activities and approximate numbers of tourists. There will be three IAATO-member large vessels visiting the Antarctic Peninsula during the 2002-03 season. This represents an increase from the 2001-2002 season. During the 2003-2004 season at least one more additional large cruise-only vessel (no landings) plans to visit Antarctica.
- 6.2 We assume that DAP and Lan Chile are planning on flying tourists from Punta Arenas, Chile, to King George Island and either offering a day trip or overnight at Marsh Base. Specific information is difficult to obtain. Contact either airlines directly for information.
- 6.3 There is a proposed tourist operation for the 2002-03 season intending to operate from Cape Town, South Africa, to Dronning Maud Land. Details on number of flights, estimated tourists or operational logistics is currently unavailable.

- 6.4 Some national program vessels carry tourists. National Programs should report their tourist numbers and activities.

## 7 Antarctic Tourism Trends

- 7.1 For the past 13 years, the U.S. National Science Foundation (NSF) has compiled and distributed detailed information on Antarctic tourist activities. IAATO collaborates with NSF to ensure that all Antarctic tourism is represented, not just that of U.S. organizers. Appendices include the following tables and charts compiled by NSF and IAATO to reflect the 2001-2002 season. This data is an invaluable resource, showing tourism activity at individual landing sites over time.

Appendix C Antarctic Tourist Trends

Appendix D Peninsula Sites Ranking in the Top 5 Most Visited Sites

\*Note Appendix C, D are Excel documents and are attachments to this paper

- 7.2 The following data sheets will be placed on the IAATO website under the category of "Tourism Statistics." (1) Continental Sites, Ranking in the Top 8 Most Visited Sites for the Last 11 seasons (1992-2002 ), (2) Summary of Continental Sites Visited by Tour Ships, 2001-2002, (3) Overview of Continental Sites Visited over 10 seasons, (4) Thirteen Season (1989-2002 ) Overview of Sites Visited in the Antarctic Peninsula, (5) 2001-2002 Summary of Peninsula Sites Visited by Tour Ships, (6) Peninsula Sites Ranking in the Top 5 Most Visited Sites for the last 13 Seasons (7) 2001-2002 Tourists by Nationality, (8) 2001-2002 Nationalities of Seaborne and Land-Based Antarctic Tourists, (9) Comparison of Nationalities 1994-2002, (10) Projected Trends in Antarctic Tourism, (11) 1992-2002 Antarctic Tourist Trends, (12) Summary of Seaborne and Land-Based Antarctic Tourism by Departures 2001–2002.
- 7.3 During the 2001-2002 season the following 10 Peninsula sites were the most highly visited by tourists, crew and staff. Total numbers of people are in brackets.
- Whalers Bay (6,972)
  - Half Moon Island (5,317)
  - Pendulum Cove (4,994)
  - Port Lockroy/Goudier Island (4,412)
  - Neko Harbour (4,233)
  - Cuverville Island (4,155)
  - Waterboat Point (3,758)
  - Paulet Island (3,357)
  - Hannah Point (2,927)
  - Jougla Point-adjacent to Port Lockroy (2,796)
- 7.4 During the 2001-2002 season the following 7 Continental sites were ranked as the most highly visited by tourists, expedition staff and crew. Total numbers of people are in brackets.
- Cape Adare (455)
  - Cape Evans-Ross Island (402)
  - Terra Nova Station (269)
  - Cape Hallett (246)
  - Cape Royds-Ross Island (246)
  - Cape Washington (201)

- McMurdo Station (156)

\*Note the above numbers are inclusive of all expedition staff, crew and passengers. In order to measure long-term cumulative impact it is necessary to look at the total number of people who landed at each site and not just tourists.

7.5 IAATO currently predicts that Antarctic tourism will continue to grow if, as expected, large ships include Antarctica in itineraries such as “Round the World,” or “Round South America” etc. Currently there are approximately 20 large ships visiting South America that could add Antarctica into their cruise itineraries. The significant increase in numbers reflects the numbers carried by large vessels but not necessarily the number of tourists that might land in Antarctica or for how long the tourists would land.

### Historical Statistics (1992-2002) and 5-Year Forecast of Seaborne Antarctic Tourism 2003-2007

Table 1

Year	#Operators	#Ships And Sailing vessels	#Voyages	#Tourists Multiple Landings	#Tourists No Landings	#Tourists 2 or less landings
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 +sailing vessels	92 plus yachts	9,473		
1998-99	15	15 +sailing vessels	116	9,857		
1999-00	17	21 +sailing vessels	154	11,880	936	1,807
2000-01	15 plus sailing vessels	32 incl sailing vessels	131 (not incl sailing vessels)	12,109 incl vessels	0	0
2001-02	19 plus sailing vessels	37 incl sailing vessels	117	11,429	2029	0



### Future 5 Year Forecast

\*\*\*Note these numbers are ESTIMATES only and can easily fluctuate based on the world economy

Table 2

Year	Sea---Ships, Yachts/Air-Landbased Landing	Large Ship/No Landing	Air/Overflight
2002-03	13,964	2,700	3,200
2003-04	14,500	4,000	4,500
2004-05	15,000	4,500	4,500
2005-06	15,000	5,000	4,500
2006-07	16,000	5,000	5,000

7.6 IAATO will continue to monitor developments in the tourism industry. Antarctic tourism will probably remain a relatively specialized and expensive niche destination offered mainly by a small number of experienced small ship tour operators, whose focus will continue to be on educational voyages to areas of exceptional natural history and wilderness value. There is a more visible trend towards the diversification of activities from these tourist vessels such as scuba diving, mountain climbing and kayaking. In addition large ships are likely to operate voyages in the region but with few or no landings in Antarctica, placing more emphasis on the scenic beauty aspects. Large ships have been visiting the Antarctic Peninsula on a regular basis since 1993.

### 8 Conclusion

In practice and as long as the information is available to the IAATO Secretariat, all tour operators – whether or not associated with IAATO – are included in emergency contact information, exchange of information and other activities of the IAATO Secretariat. Prospective members are encouraged to participate in the annual general meeting of IAATO, where IAATO Bylaws and operating procedures, obligations of the Antarctic Treaty System and other matters are discussed and policies developed.

### Appendices:

- A IAATO Overview of Antarctic Tourism, 2001-2002
- B IAATO Preliminary Estimate of Antarctic Tourism, 2002-2003
- C Antarctic Tourist Trends (excel document)
- D Peninsula Sites Ranking in the Top 5 Most Visited Sites (excel document)

\*\*Note, please see IAATO website for additional information [www.iaato.org](http://www.iaato.org)

## Appendix A

### IAATO Overview of Antarctic Tourism 2001-2002

(Based on information provided by Antarctic tour operators to the IAATO Secretariat as of June 28, 2002)

Vessel IAATO Members	Operator/Charterer- Landing	Vessel Registry	Nationality of Operator	Passenger Capacity	Number of Voyages	Actual Number of Passengers	Activities
<i>Peninsula</i>	IAATO Vessels						
<i>Bremen</i>	Hapag Lloyd Kreuzfahrten	Bahamas	Germany	164	8	1013	zodiacs
<i>Clipper Adventurer</i>	Zegrahm Expeditions Inc.	Bahamas	United States	122	1	106	zodiacs
<i>Clipper Adventurer</i>	Clipper Cruise Line/New World Ship Management Co LLC	Bahamas	United States	122	8	744	zodiacs
<i>Endeavour</i>	Lindblad Expeditions	Bahamas	United States	110	7	698	zodiacs, kayaking underwater ROV
<i>Explorer</i>	Abercrombie and Kent/Explorer Shipping	Liberia	United States	96	8	652	zodiacs
<i>Grigoriy Mikheev</i>	Oceanwide Expeditions	Russia	Netherlands	46	5	220	zodiacs
<i>Hanseatic</i>	Hapag-Lloyd Kreuzfahrten	Bahamas	Germany	180	6	728	zodiacs
<i>Akademik Ioffe</i>	Peregrine Adventures	Russia	Australia	117	10	918	zodiacs, camping, kayaking
<i>Kapitan Dranitsyn</i>	Quark Expeditions	Russia	United States	100	9	705	zodiacs, helicopters
<i>Polar Pioneer</i>	Aurora Expeditions	Russia	Australia	54	9	469	zodiacs, kayaking, climbing, scuba diving
<i>Polar Star</i>	Polar Star Expeditions	Barbados	Norway	100	9	676	zodiacs
<i>Professor Molchanov</i>	Quark Expeditions and Adventure Associates	Russia	United States, Australia	52	9	412	zodiacs
<i>Professor Molchanov</i>	Oceanwide Expeditions	Russia	Netherlands	52	1	45	zodiacs
<i>Professor Multanovskiy</i>	Quark Expeditions	Russia	United States	52	6	282	zodiacs, scuba diving
<i>Professor Multanovskiy</i>	Quark and Heritage Expeditions	Russia	United States	52	1	43	zodiacs, scuba diving

<b>Vessel</b> <i>Peninsula cont.</i>	<b>Operator/Charterer-Landing</b>	<b>Vessel Registry</b>	<b>Nationality of Operator</b>	<b>Passenger Capacity</b>	<b>Number of Voyages</b>	<b>Actual Number of Passengers</b>	<b>Activities</b>
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<i>Professor Multanovskiy</i>	Antarctic Horizons	Russia	United States	52	1	45	zodiacs, kayaking
<i>Professor Multanovskiy</i>	Mountain Travel Sobek	Russia	United States	52	1	46	zodiacs, kayaking
<i>S/Y Pelagic</i>	Pelagic Expeditions	British Virgin Islands	United Kingdom	6	1	6	zodiacs
<i>Vista Mar</i>	plantours and Partner	Barbados	Germany	280	1	265	zodiacs
<i>Ryndam Cruise Only</i>	Holland America Line	Netherlands	United States	1200	2	2029	n/a
<b><i>Continental Voyages</i></b>							
<i>Kapitan Khlebnikov</i>	Quark Expeditions	Russia	United States	108	2	127	zodiacs, helicopters
<i>Kapitan Khlebnikov</i>	Quark Expeditions and Victor Emanuel Nature Tours	Russia	United States	108	1	90	zodiacs, helicopters
<i>Akademik Shokalskiy</i>	Heritage Expeditions	Russia	New Zealand	46	2	92	zodiacs, helicopter
<i>Sir Hubert Wilkins</i>	Ocean Frontiers Pty	Vanuatu	Australia	20	1	12	zodiacs, helicopter
Land-based programs	Adventure Network International	N/A	United States	Varies	varies	159	skiing, climbing, camping

<b><i>Non IAATO Members</i></b>	<b>Peninsula only</b>						
<i>Marco Polo</i>	Orient Lines	Bahamas	United States	800	6	2893	zodiacs
<i>Over flights/landing one /overnight Beechcraft 200</i>	DAP-Chile?	N/A	Chile	8	15??	????	???
<i>Over flights/Peninsula-with landings Beechcraft 200</i>	DAP-Chile?	N/A	Chile	9	15??	?????	????

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<i>Air/Over flights</i>	<b>Operator</b>	<b>Country</b>	<b>Passenger Capacity</b>	<b>Number of Voyages</b>	<b>Number of Passengers</b>
<i>Non IAATO Members</i>					
<i>Over flights/Peninsula-no landing Boeing 737</i>	Lan Chile	Chile	60	8	330
<i>Continental/Continental no landing Boeing 747-400</i>	Croydon Travel	Australia	394	6	2082

## Appendix A

### Overview of Non IAATO Member Yachts 2001-02

<i>Yacht/Sail Boat/Non Members</i>	<i>Operator</i>	<i>Nationality Of Operator</i>	<i>Passengers</i>	<i>Crew</i>
<i>Non-IAATO Members</i>				
<i>S/Y Paratii 2</i>	Amyr Klink	Brazil	2	3
<i>S/Y Gambo</i>	Dave Hildes	Canada	5	2
<i>S/Y Dione Star</i>	Brian Harrison	Cayman Isl	8	6
<i>S/Y Croix Saint Paul II</i>	Polar Expeditions	France	8 8	2 2
<i>S/Y Le Sourire</i>	Huges Delignieres	France	8	2
<i>S/Y Hinayana</i>	Remy Poirier	France	3	2
<i>S/Y Fernande</i>	Pascal Grindberg	France	6 3 7	3 3 2
<i>S/Y L'ile Nue</i>	Philippe Dupond	France	4	2
<i>S/Y Kotick</i>	Alain Caradec	France	0	2
<i>S/Y Sarah W. Vorwerk</i>	Capt. Henk Boersma	Germany	7 8	2 2
<i>S/Y Santa Maria</i>	Wolf Kloss	Germany	5	2
<i>S/Y Helena Cristina</i>	AAD Twiet	Netherlands	3	2
<i>S/Y Koan Arukanu</i>	Juan Ribas	New Zealand	0	2
<i>S/Y Philos</i>	Philos Expeditions	Switzerland	5	1 ??
<i>S/Y John Laing</i>	British Army Antarctic Expedition	United Kingdom	0	15
<i>S/Y Ada II</i>	Celia Bull	United Kingdom	N/A	6
<i>S/Y 2041</i>	Mission Antarctica (Mission Antarctica is an Associate IAATO member)	United Kingdom	4 8 8 7 7 3	4 5 5 5 5 4
<i>S/Y Alaska Eagle</i>	Orange Coast College School of Sailing & Seamanship	United States	8	4
<i>S/Y Alaska Eagle</i>	Richard Crowe	United States	7	5
<b>Total</b>			<b>142</b>	<b>100</b>

\*\*The following is gleaned from information provided by the staff at Palmer Station and Port Lockroy. This isn't necessarily accurate. We don't have specific information on how many different trips or an accurate account of passengers and crew. This is used as a general overview but should NOT be quoted as 100% accurate.

## Appendix A

<b>Totals-2001-2002 Season</b>	<b>Number of Departures</b>	<b>Total Number of Tourists (not including officers, staff, crew)</b>
IAATO Small Ship Traditional Tourism/ Peninsula-landing	103	8073
IAATO Small Ship Traditional Tourism/Continental	6	321
IAATO Large Ship Cruise Only/Peninsula	2	2029
IAATO Member-Land Based Programs	N/A	159
Non IAATO Sailing Vessel/Yacht Based Tourism/Peninsula	N/A	142
Non IAATO-Large Ship/Landing/Peninsula	6	2893
Non IAATO-Air/Over flights/Peninsula-no landing	9 (Lan Chile+ DAP (?))	330 (Lan Chile) +DAP (?)
Non IAATO-Air/Over flights/Continental-no landing	6	2082

### *Totals of Visitors for the 2001-2002 Season*

<i>Seaborne Traditional Tourism with Landings</i>	<i>11,429</i>
<i>Seaborne Tourism No Landing/large ships</i>	<i>2,029</i>
<i>Land Based Tourism Traditional (ANI)</i>	<i>159</i>
<i>Air Overflights/No Landing</i>	<b>2,412 plus DAP?</b>

Numbers of tourists participating in privately sponsored expeditions or government sponsored tourist programs are not included in these totals. Supposedly there are tourists traveling with Russia, Chile (Navy), Argentina, France and South Africa although this assumption will need government verification.

## Appendix B

### IAATO Preliminary Estimate of Antarctic Tourism 2002-2003 and Future Five Year Forecast

*Based on information provided by Antarctic Tour Operators to the IAATO Secretariat as of August 10, 2002*

Vessel	Vessel Registry	Operator/Charterer	Nationality of Operator	Passenger Capacity	Probable # Voyages	Estimated Average Load	Probable # Passengers 2002-2003 season
<b>IAATO Members, Peninsula Voyages</b>							
<b>Bremen</b>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	150	8	120	960
<i>Clipper Adventurer</i>	Bahamas	Zegrahm Expeditions Inc.	United States	122	1	110	110
<i>Clipper Adventurer</i>	Bahamas	Clipper Cruise Line/New World Ship Management Co LLC	United States	122	8	110	980
<i>Endeavour</i>	Bahamas	Lindblad Expeditions	United States	110	8	100	700
<i>Endeavour</i>	Bahamas	Zegrahm Expeditions	United States	110	1	80	100
<i>Explorer</i>	Liberia	Abercrombie and Kent/Explorer Shipping	United States	96	8	80	640
<i>Explorer</i>	Liberia	Victor Emanuel Nature Tours	United States	96	1	90	90
<i>Grigoriy Mikheev</i>	Russia	Oceanwide Expeditions	Netherlands	46	9	38	342
<i>Hanseatic</i>	Bahamas	Hapag-Lloyd Kreuzfahrten	Germany	160	5	120	600
<i>Akademik Ioffe</i>	Russia	Peregrine Adventures	Australia	117	10	90	900
<i>Lyubov Orlova</i>	Russia	Quark Expeditions	United States	110	9	90	810
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	54	8	50	400
<i>Polar Star</i>	Barbados	Polar Star Expeditions	Norway	100	8	90	720
<i>Polar Star</i>	Barbados	Cheesemans' Ecology Safaris	Norway/US	100	1	90	90
<i>Professor Molchanov</i>	Russia	Quark Expeditions	United States	49	10	40	400
<i>Professor Molchanov</i>	Russia	Oceanwide Expeditions	Netherlands	52	1	30	30
<i>Professor Multanovskiy</i>	Russia	Quark Expeditions	United States	49	6	45	270
<i>New World Discoverer</i>	United Kingdom	Society Expeditions	United States	160	7	145	1015
<i>Nordenorge</i>	Norway	Ovotens og Vesteraalens Dampskibsselskab ASA	Norway	400	8	175	1400
<b>Total</b>					<b>117</b>		<b>10,557</b>

Vessel	Registry	Operator/Charterer	Nationality of Operator	Passenger Capacity	Probable # of Voyages	Estimated Average Load	Probable # of Passengers-2002-2003 season
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*IAATO Members, Continental Voyages*

<i>Kapitan Khlebnikov (Circumnavigation of Antarctica)</i>	Russia	Quark Expeditions	United States	112	3	300	240
<i>Akademik Shokalskiy</i>	Russia	Heritage Expeditions	New Zealand	46	2	46	92
<b>TOTAL</b>					<b>5</b>		<b>332</b>

**Sailing Vessels**

<b>IAATO Members</b>							
<i>S/Y Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	3	18	18
<i>S/Y Golden Fleece</i>	Falkland Islands	Golden Fleece Expeditions	United Kingdom	10	3	9	27
<i>Non IAATO Members, Peninsula Voyages</i>							
<i>Bark Europa</i>	Netherlands	Reederij Bark Europa	Netherlands	40	2	40	40
<i>Oosterschelde</i>	Netherlands	Reederij Oosterschelde	Netherlands	52	2	50	100
Assorted Sailing Vessels/Yachts (~15)	varies	Various	Several	Varies	15	10	140
<b>TOTAL</b>					<b>25</b>		<b>325</b>



**Appendix B**  
**IAATO Preliminary Estimate of Antarctic Tourism 2002-2003**  
**and Five Year Forecast**

Based on information provided by Antarctic Tour Operators to the IAATO Secretariat as of August 10, 2002

<i>Large Cruise Vessels</i>							
<i>IAATO Members (Cruise Only)</i>							
<i>Ryndam</i> (Peninsula)	Netherlands	Holland America Line	United States	1200	1	1000	1000
<i>Amsterdam</i>	Netherlands	Holland America Line	United States	1200	1	1000	1000
<i>Crystal Symphony</i>	Bahamas	Crystal Cruise Lines	United States	940	1	940	700
<b>TOTAL</b>							<b>2700</b>

<b>Non IAATO Members (With Landings)</b>							
<i>Marco Polo</i> (Peninsula)	Bahamas	Orient Lines	United States	800	5	550	2750
<b>Non IAATO Members (Without Landings)</b>							
<i>none</i>							0
<b>TOTAL</b>							<b>2750</b>

## Appendix B

### IAATO Preliminary Estimate of Antarctic Tourism 2002-2003 and Five Year Forecast

*Based on information provided by Antarctic Tour Operators to the IAATO Secretariat as of August 10, 2002*

#### AIRBORNE TOURISM

Description	Operator	Country	Passenger Capacity	Probable # Voyages	Estimated Ave. Load	Probable #Passengers 2002-2003 season
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IAATO Members, Land-based						
Land-based programs	Adventure Network International	United States	Varies	varies	Varies	160

Non IAATO Members, with Landings						
<i>Flights to Dronning Maud Land and Novolazarevskaya</i>	Transworld Tourism	South Africa/Russia	40	??	??	??
<i>Overflights/landing one/overnight Beechcraft 200</i>	DAP	Chile	8	15 ???	120????	120????
<i>Overflights/Peninsula with landings Beechcraft 200</i>	DAP	Chile	9	15???	135???	135???

Non IAATO Members, without Landings						
<i>Overflights/Peninsula no landing Boeing 737</i>	Lan Chile	Chile	60	20	40	800
(n.b. Lan Chile: estimated, based on previous season, no official number provided. DAP from Chile also operates over flights but no information is available)						
<i>Overflights/Continental no landing Boeing 747-400</i>	Croydon Travel	Australia	394	6	394	2364

## Appendix B

### IAATO Preliminary Estimate of Antarctic Tourism 2002-2003 and Five Year Forecast

Based on information provided by Antarctic Tour Operators to the IAATO Secretariat as of August 10, 2002

#### SUMMARY OF ESTIMATES for the 2002-2003 SEASON (All Tourist Types)

Types of Tourism	Number of Departures	Total Number of Tourists (not including officers, staff, crew)
Small Ship Traditional Tourism/ Peninsula	117	10,557
Small Ship Traditional Tourism Circumnavigation/Continental/Ross Sea	5	332
IAATO Sailing Vessels/Operators	22	45
Non IAATO Yacht Based Tourism/Peninsula	varies	280
Large Ship/Landing/Peninsula	5	2,750
Large Ship Cruise Only/Peninsula	3	2,700
IAATO Member-Land Based Programs	N/A	160
Non IAATO Member Overflight/landing- DAP		???
Non IAATO Land Based/DML		???
Non-IAATO Air/Overflights/ -no landing	6	3164 + DAP

#### Summary for 2002–2003 Season

Total Visitor Estimates for 2002-03 Season	
Seaborne Traditional Tourism with landing	<b>13,964</b>
Seaborne Tourism no landing/large ships	<b>2700</b>
Air-Land Based Traditional Tourism (ANI) with landing	<b>160</b>
Air-Land based Non Traditional with landing	<b>???</b>
Air Overflights no landing	<b>3164+DAP</b>

## Appendix B

### Forecast of Antarctic Tourism for next five years. Seasons 2002/3 - 2006/7

Note, this is an 'ESTIMATE' only. There is limited communication from new small companies and large ship operators. As the industry changes, so will the estimates. It is difficult to predict the number of large ships or aircraft entering the Antarctic Market at this stage and therefore the 2002-2006 increases are only a guess.

IAATO is not provided with information on government supported tourist programs, tourist trips operated by Russian and South African tour operators, or the Chilean Navy or specific air overflight operations to the Antarctic Peninsula.

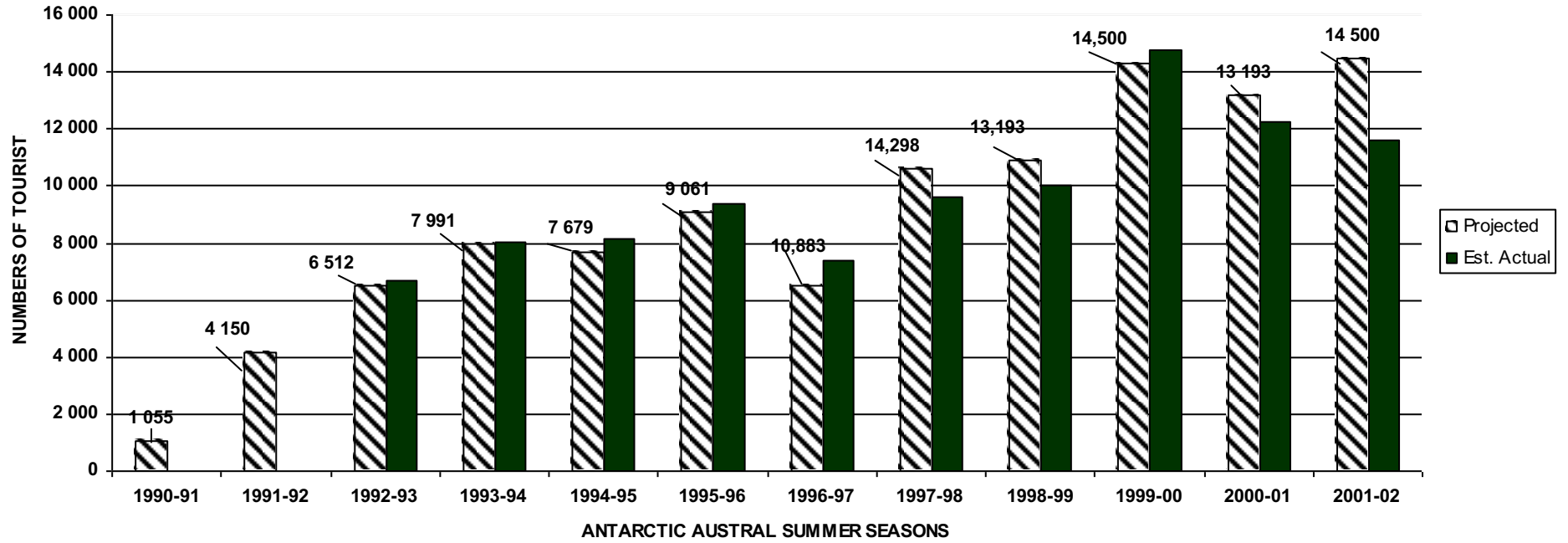
It is important to recognize that the numbers shown below would be more likely to decrease than increase.

Year	LANDING	NO LANDING	
	Sea-Ships, Yachts, Air-Landbased	Large Ship	Air Overflight
2002-03	13,964	2,700	3,200
2003-04	14,500	4,000	4,000
2004-05	15,000	4,500	4,500
2005-06	15,000	5,000	4,500
2006-07	16,000	5,000	5,000

## Appendix C

### 1992-2002 ANTARCTIC TOURIST TRENDS

[Includes Ship and Land-based passenger numbers. 1997-98 onwards includes commercial yacht activity.]



	1989-90	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-2000	2000-2001	2001-2002
Whalers Bay	1 682	1 496	2 899	1 711	3 480	5 241	5 033	3 012	5 344	5 427	7 333	7 065	6 972
Half Moon Island	1 191	1 011	2 984	1 585	2 961	3 017	5 221	2 258	4 382	3 931	1 454	5 711	5 317
Pendulum Cove	587	1 215	2 011	1 936	3 159	2 803	3 492	2 725	3 426	4 676	5 300	4 211	4 994
Goudier Island				357	275	560	44	262	467	1 302	2 246	2 575	4 412
Neko Harbor							963	2 348	1 737	3 613	4 794	4 383	4 233
Cuverville Island	883	936	2 565	1 589	2 174	3 367	4 343	3 714	4 143	4 087	4 908	5 615	4 155
Port Lockroy	796	1 067	2 615	2 139	4 274	1 769	3 851	3 110	6 429	6 473	7 804	5 726	1 442

  = Most visited site for that season.

90-91 =Gonzales Videla was top site w/ 1,965

