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IAATO Overview of Antarctic Tourism 2006-2007 Antarctic Season

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

Introduction

The International Association of Antarctica Tour Operators (IAATO) is pleased to provide this summary of Antarctic tourism for the 2006-2007 season and a brief overview of Antarctic tourism trends. Due to the early timing of this meeting, IAATO anticipates completing a revision of this paper in the coming months. This, and additional information will be posted on www.iaato.org in due course. Preliminary information presented here is based on the best available knowledge at the time this document was prepared.

With a view to improving the accuracy of this information further, IAATO would again like to make a formal request to all National Authorities to request the use of the standard Post Visit Report Form where appropriate and for IAATO to receive copies of these forms whenever possible for all expeditions engaged in tourist-related activities for inclusion in the database. This will allow an accurate reflection of overall numbers; compilations of detailed tourism data on all landing sites; and assist in compiling data for use in furthering the understanding of any potentially resulting cumulative impacts from these activities. This request has been made at previous ATCM's and IAATO is pleased to note that some forms have been forthcoming, but is aware that the current database record is still not complete.

1.0 Overview

1.1 IAATO Member Activities

As with the 16 past seasons, IAATO membership continues to incorporate the majority of all Antarctic tour operators. This season the membership accounted for over 90% of all known operators.

A summary of IAATO Member activities follows:

- 908 clients participated in land-based expeditions.
- 24,296 passengers landed from seaborne vessels in the Antarctic Treaty Area. Of this total:
 - 23,545 passengers landed in the Antarctic Peninsula area
 - 623 passengers landed in the Ross Sea or Continental region of Antarctica
 - 128 passengers sailed aboard small sailing vessels and/or yachts in the Antarctic Peninsula.
- 174 passengers participated in air/cruise voyages to the Antarctic Peninsula area and flew from South America to King George Island to embark a vessel and sail for six days, making landings.
- 6,930 passengers traveled aboard large cruise vessels that were cruise-only (and did not land in the Antarctic Treaty Area).
- 360 passengers participated in over-flights from South America to the Antarctic Peninsula area aboard aircraft.
- 686 passengers participated in over-flights to Antarctica from Australia.

- All 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.

1.2 Non-IAATO Operator's Activities

IAATO understands that for those involved in both the management and regulation of Antarctic tourism, there is immense value in the maintenance of a single comprehensive database of all tourist-related activities. To this end, IAATO strives to incorporate as detailed information as is available in this report. The Association would welcome any information on non-IAATO tourist-related activities for inclusion in this database.

- 4,152 passengers traveled aboard 4 non-IAATO-operated vessels or aircraft, landing passengers in the Antarctic Peninsula area.
- An unknown number of passengers traveled on small sailing vessels/yachts and private motor yachts, a number of which were understood to be un-authorized. Information pertaining to any of these vessels has not as yet been provided by either the vessel operators or, where authorized, National authorities.
- Government-supported tourist-related activities on ships and aircraft occurred, but information has not been provided to IAATO for activities departing from South Africa and South America, so this information has not been included in this report.
- 9 tourists participated in a program offered by Uruguay at Artigas Station. Uruguay kindly advised IAATO of its activities.
- Both private and commercial activities were conducted where Advance Notification and Post Visit Reports had been filed through National Authorities. To date, only limited information has been forwarded to IAATO for inclusion in this report. IAATO would however be pleased to receive any such Post Visit Reports for inclusion in the tourism database.
- Several countries did not require Environmental Impact Assessments and/or Post Visit Site Reports from commercial tourist operations to report on their activities. IAATO has not been given any detailed information regarding these tourist activities. IAATO would be pleased to receive any detailed data on these tourist operations for inclusion in the database.

1.3 Scope of Commercial Tourist Activities

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

A brief summary of the season, including an "Overview of Antarctic Tourism 2006-2007," and "IAATO Preliminary Estimate of Antarctic Tourism 2007-2008," are appended as Appendix A and Appendix C, respectively, which provide further details of the operators (IAATO and non-IAATO), vessels, activities and numbers. The histogram in Appendix B illustrates estimated and actual tourism figures for seaborne and land-based passengers as compiled since the 1992-1993 season.

Based on information returned to IAATO in annual reports or in the Post Visit Reports from the 2006-2007 season it is estimated that at least 29,522 passengers landed in the Antarctic on private sector seaborne and land-based expeditions.

Most, but not all, commercial tour companies during the 2006-2007 season were located in the States of Contracting Parties.

2.0 Commercial Seaborne Tourism – IAATO Members and non-Members of IAATO

2.1 Seasonal Estimates

While the information given below is an accurate reflection of the data available IAATO cautions users who compare data from year to year to look at the annual list of individual vessels and compare it to reports from Antarctic Treaty Consultative Parties' exchange of information.

IAATO can account for 28,531 passengers landed in the Antarctic Treaty Area from 48 commercially-organized tour vessels and small sailing vessels and/or yachts who reported their activities from October 2006 to March 2007. This number includes Members and non-IAATO members. This represents a 14% increase over the 2005-2006 season where a total of 25,167 ship-based passengers were reported traveling aboard 44 commercially-organized tour vessels and small sailing vessels and/or yachts.

IAATO Members operated all but four of the tour vessels that sailed during the 2006–2007 season. Since 2001, IAATO's Bylaws have stated that IAATO vessels carrying more than 500 passengers cannot land passengers ashore and that stringent landing restrictions are placed on vessels carrying more than 200 passengers at specific landing sites due to environmental considerations. Three of the vessels capable of carrying more than 500 passengers operated by non-IAATO Members landed passengers; only one regularly landed more than 500 passengers. These companies do not intend to join IAATO.

Table 1. Historical Statistics (1992-93 – 2006-07) of Recorded Seaborne Tourism

Year	# of Operators or Charterers ***	# of Ships & Sailing Vessels	# of Voyages	Multiple Landings	Cruise Only
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**	48**	328*	28,531	6,930

*Does not include non-member small sailing vessels/yachts.

**Includes small sailing vessels and/or yachts where the information was available and non-Members of IAATO that are known to have sailed.

Note: Table 1 is based on data provided by companies who submitted Post Visit Reports and from other sources where available.

The vast majority of commercially-operated voyages operate in the Antarctic Peninsula region during the five-month austral summer season (from late October to March), departing from Ushuaia

or, to a lesser extent, from Stanley, Punta Arenas, Puerto Williams, Puerto Montt, Valparaiso, Puerto Madryn, Buenos Aires and Rio de Janeiro.

The five large cruise vessels (*Deutschland*, *Golden Princess*, *Rotterdam*, *Prinsendam*, and *Crystal Serenity*) operated by IAATO Members who each carry more than 500 passengers and conducted cruise-only operations visited the Antarctica Peninsula area for approximately 72-96 hours on each voyage and carried a total of 6,930 passengers.

2.2 Commercial Antarctic Tour Vessels Operating in 2006-2007

IAATO Members:

<i>Ship/Sailing Vessel</i>	<i>Registry</i>	<i>National Authority</i>	<i>Passenger Capacity</i>	<i>Operating in Antarctica Since*</i>
<i>Explorer(7)</i>	Liberia	Canada	108	1970
<i>S/V Pelagic</i>	Panama	Various**	6	1988
<i>Bremen (1)</i>	Bahamas	Germany	164	1991
<i>Professor Molchanov</i>	Russia	USA	52	1991
<i>Kapitan Khlebnikov</i>	Russia	USA	108	1992
<i>Akademik Sergey Vavilov</i>	Russia	Australia	100	1992
<i>Akademik Ioffe</i>	Russia	Australia	117	1993
<i>Hanseatic</i>	Bahamas	Germany	180	1993
<i>Akademik Shokalskiy</i>	Russia	USA	46	1994
<i>Clipper Adventurer(2)</i>	Bahamas	USA	120	1994
<i>Professor Multanovskiy</i>	Russia	USA	52	1995
<i>National Geographic Endeavour(3)</i>	Bahamas	USA	110	1998
<i>Grigoriy Mikheev</i>	Russia	Netherlands	46	1999
<i>S/V Golden Fleece</i>	Falkland Islands	UK	10	2000
<i>S/V Le Sourire</i>	France	France	8	2000
<i>Vistamar</i>	Spain	Germany	280	2000
<i>Bark Europa</i>	Netherlands	Netherlands	36	2000
<i>Polar Pioneer(4)</i>	Russia	Australia	54	2001
<i>Polar Star</i>	Barbados	Norway	100	2001
<i>Nordnorge</i>	Norway	Norway	400	2002
<i>Orlova</i>	Russia	USA	120	2002
<i>Ushuaia</i>	Panama	Argentina	75	2002
<i>Andrea</i>	Liberia	USA	115	2003
<i>Crystal Serenity</i>	Bahamas	USA	618	2003
<i>Explorer II / Alexander Von Humboldt(5)</i>	Bahamas	USA	199 / 420	2003
<i>Orion</i>	Bahamas	Australia	106	2003
<i>S/V Pelagic Australis</i>	British Virgin Is	UK	10	2003
<i>S/V Tooluka</i>	Netherlands	Netherlands	6	2003
<i>Saga Rose</i>	Bahamas	UK	499	2003
<i>The World</i>	Bahamas	USA	650	2003
<i>S/V Australis</i>	Australia	Australia	10	2004
<i>Spirit of Enderby (6)</i>	Russia	New Zealand	48	2004
<i>Le Diamant</i>	France	France	199	2005
<i>Aleksey Maryshev</i>	Russia	Netherlands	46	2005
<i>Antarctic Dream</i>	Chile	Chile	78	2005
<i>Corinthian II</i>	Malta	USA	114	2005
<i>Nordkapp</i>	Norway	Norway	471	2005

<i>Prinsendam</i>	Netherlands	USA	700	2005
<i>Rotterdam</i>	Netherlands	USA	1200	2005
<i>S/Y Santa Maria</i>	Germany	Germany	6	
<i>S/V Santa Maria Australis</i>	Germany	Germany	9	2005
<i>S/V Vaih��r��</i>	France	France	10	2005
<i>Sarpik Ittuk</i>	Bahamas	USA	84	2006
<i>Delphin</i>	Bahamas	Germany	500	2007
<i>Deutschland</i>	Germany	Germany	520	2007
<i>Golden Princess</i>	United Kingdom	USA	3100	2007
<i>S/V Seal</i>	USA	USA	6	2007

* Please note that not all vessels have operated every season since first visiting Antarctica.

** Vessel is covered under the individual expeditions onboard

(1) Formerly *Frontier Spirit*

(2) Formerly *Alla Tarasova*

(3) Formerly *Caledonian Star*

(4) Formerly *Akademik Shuleykin*

(5) The ship's capacity changes from 199 when operated as the *Explorer II* to 420 when operated as the *Alexander von Humboldt*

(6) Formerly *Professor Khromov*

(7) Formerly *Lindblad Explorer* and *Society Explorer*

2.3 Commercial Antarctic Small Sailing Vessel and/or Private Luxury Yacht Activities including those operated by non-IAATO Members

Based on information received from IAATO Member yachts it is known that at least 128 passengers were reported to have traveled to the Antarctic Treaty Area aboard 10 or more commercially-operated small sailing vessels and/or private yachts during the 2006-2007 season. For non-Member vessels this information may be found under the Exchange of Information submitted by each Antarctic Treaty Party who permits or authorizes the vessel or company.

IAATO Commercial Small Sailing Vessels and/or Yachts with fare-paying passengers include *Pelagic*, *Pelagic Australis*, *Golden Fleece*, *Tooluka*, *Australis*, *Le Sourire*, *Santa Maria Australis*, *Seal* and *Vaih  r  *.

A partial list of non-Member Private Luxury Yachts, small ships and/or Small Sailing Vessels visiting Antarctica during the 2006-2007 season include: *Abel Tasman*, *Patagonia Ice Lady*, *Octopus*, *Celtic Spirit*, *Sadko*, *Commitment*, *Sarah Vorwerk*, *Spirit of Sydney*, *Valhalla*, *Whale Song* and others. Not all vessels were permitted, authorized, or aware of the need to have applied for permission to their respective national authority. IAATO received Post Visit Report Forms from *Octopus*, *Sadko* and *Spirit of Sydney* only.

3.0 Activities Conducted from Expedition Cruise Vessels

All activities are approved through the Environmental Impact Assessments or operational documentation submitted in advance of the season to have no more than a minor or transitory impact on the Antarctic environment.

3.1 Camping in the Peninsula

Six IAATO Members conducting traditional seaborne tourism to the Antarctic Peninsula offered short overnight stays in conjunction with the cruise. Camping provides an excellent opportunity for tourists to experience a sense of wilderness in Antarctica, separate from being on the ship. Guides accompany each group ashore. This activity has taken place for at least ten years in the Peninsula region.

Campsites are generally located at least 450 ft. (150 m) from nesting birds, including penguins, and located on snow or bare rock, rather than on gravel where the ground could be flattened by tent sites, or organic debris might be covered. Each campsite is used for no more than a few nights per season. Toilets are generally taken ashore; human waste is returned to the ship and meals are eaten only on board the ship.

3.2 Climbing and Kayaking from Ships in the Peninsula Area

Nine companies offered climbing and/or kayaking. Climbing and kayaking have proven to be successful activities for more than ten years in the Antarctic Peninsula area.

3.3 SCUBA Diving

Four companies offered SCUBA diving. Scuba diving has taken place for at least eight years.

3.4 Underwater Remotely Operated Vehicle (ROV)

An ROV has been used by one IAATO Member for over five years. The ROV is used for educational purposes. Video footage is taken by the ROV and aired aboard ship for passengers to be able to experience first-hand the underwater sea life. One private IAATO non-Member vessel also used a ROV.

3.5 Helicopter Operations

Helicopter operations were conducted by one IAATO Member during the 2006-2007 season. One private IAATO non-Member vessel also completed helicopter flights. Helicopter operations have taken place since the 1992-1993 season.

3.6 Hovercraft Operation

One IAATO Member used a Hovercraft in the Ross Sea area during the 2006-2007 season.

4.0 Commercial Land-based Tourism

4.1 Adventure Network International/Antarctic Logistics & Expeditions

IAATO member **Adventure Network International/Antarctic Logistics & Expeditions** (referred to as ALE below) operated out of Punta Arenas, Chile, for the 21st consecutive season. ALE carried a total of 204 clients, 50 Government and VIP personnel, accompanied by 68 staff and guides, and 18 air crew.

ALE employs experienced staff and guides, many of whom have worked previously at Patriot Hills and other locations to be visited (90% of all staff have previous Antarctic experience). Staff and guides assist in the preparation of policies, and ensure their implementation in Antarctica.

Activities included the operation of standard programs, organization and operation of expeditions, services for private expeditions and support for government activities. ALE's operations included the following:

Aircraft Operations:

- One Ilyushin-76 was used to ferry general and hazardous cargo, fuel, staff, guides and passengers from Punta Arenas to Patriot Hills on a total of sixteen flights.
- Two ski-equipped Twin-Otter aircraft were used for flights in Antarctica and to support medical evacuation throughout the Antarctic season.

Patriot Hills Camp:

- Patriot Hills Camp opened 06 November 2006 and closed 01 February 2007.

4.1.1 Expeditions Supported by ALE

ALE organized, operated or provided logistics support for the following expeditions:

Government Support	50
Antarctic Odyssey	5
South Pole Fly-In	15
Vinson Massif	125
Last Degree	46
Ski Safari	1
South Pole Ski	16
Emperor Penguin	1
Marathon	9
Camp Staff, Air Crew and Others	63
Total Individuals	331

Remote Automatic Weather Stations (RAWS) were again deployed at locations up to 200km inland from Patriot Hills to provide weather data.

4.1.2a Government Activity Supported by ALE

Requests from National Operators, research institutes and government agencies resulted in ALE providing support for up to 50 scientists and logistic staff and a considerable number of flights. Research groups, government representatives and their logistic support visited Patriot Hills and were accommodated at the camp for various periods. ALE hosted visitors from British Antarctic Survey (BAS), Korean Polar Research Institute (KORDI), FACH (Chile Airforce), Ejercito de Chile (Chilean Army), and Russian Federation.

On behalf of the Polar Foundation, Moscow, ALE in conjunction with the British Antarctic Survey and the National Science Foundation, supported an official Russian government expedition to the Geographic South Pole specifically organized for Dr. A. N. Chilingarov (Deputy Speaker of the Russian Duma and Russian Special Presidential Representative on International Polar Year Issues). The visit required support of ALE's Ilyushin IL-76 aircraft, two MI-8 helicopters and an AN-74 aircraft, all of which made various landings at Patriot Hills during the expedition.

ALE supported a meteorite search organized by KORDI in the Pirrit and Martin Hills and at Moulton Escarpment, providing flight, overland and field safety support for the group. The project was successful and it is hoped that a further field visit will be made in the future.

4.1.2b Expeditions Supported by ALE

ALE was delighted to be able to bring several of the original Vinson Massif first ascent group back to the mountain on the 40th anniversary of their ascent.

Polar First contracted ALE to provide logistic support and SAR for their second attempt on a Pole-to-Pole flight. Jennifer Murray led a successful two-helicopter flight to the South Geographic Pole, which they reached on January 6, 2007.

4.2 Air/ Land-based Activities Conducted by Aerovias DAP (IAATO Provisional Members)

In 2006-2007, there were 40 flights operated by **Aerovias DAP** in either a King Air or Dash 7 aircraft carrying a total of 704 clients, including station personnel on station visits and extended walks. DAP offered both a one-day flight seeing and landing at King George Island and an overnight program where clients stay on King George Island in DAP's land-based facilities. Clients accompanied by a guide visit Frei/Marsh, Bellingshausen and Great Wall Stations, and surrounding wildlife areas if time permits. DAP also facilitated five medical evacuations for IAATO Members.

5.0 Air Operations – Overflights

5.1 Overflights from South America

IAATO Member **LAN Airlines** operated 8 overflights carrying 360 clients to the Antarctic Peninsula area in a 60-passenger capacity Boeing 737-200 during the 2006-2007 season. These flights are offered as an optional excursion to cruise ship passengers and independent travelers calling at Punta Arenas.

The flying routes varied according to weather conditions but basically were conducted as follows:

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

Numerous overflights to the Antarctic Peninsula region operate or have operated from Punta Arenas, but information on these flights prior to 2003-2004 have been difficult to obtain.

5.2 Overflights from Australia

During the 2006-2007 season IAATO Member **Croydon Travel** of Victoria, Australia, operated two Antarctic daytime overflights, lasting approximately 11-12 hours in duration, operating out of Australia aboard a Qantas Airways Boeing 747-400 aircraft for the thirteenth consecutive season.

A total of 686 clients participated in these two flights. In addition, the aircraft carried a total of 50 crew members during the season. To date, Croydon has operated a total of 81 flights carrying nearly 29,000 clients since commencing Antarctic operations in the 1994-1995 season.

The flight itineraries primarily operate along the northern Victoria Land coast, and the Oates, George V and Adélie Coasts. Croydon's staff provides a full in-flight lecture and education program utilizing at least three experienced 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 occasionally at Italian bases.

6.0 Preliminary Estimate of Planned Activities for the 2007-2008 Season

Appendix C illustrates a breakout of tourism categories in order to clearly see the diversification of the tourist activities that are expected to occur during the 2007-2008 season. This is an estimate based on information provided to the IAATO Secretariat at the time this report was submitted.

For the 2007-2008 season seaborne or ship-based tourism will once again include the operation of small boats (Zodiac, Polar Circle Boats, R.I.B, Naiad, hovercraft, etc.), shore landings, kayaking, mountain climbing, SCUBA diving, skiing, snowboarding, camping, helicopter operations and use of an underwater ROV.

- 6.1 According to estimates provided to IAATO by Members and non-Members, during the 2007-2008 season 31,603 seaborne and small sailing vessels and/or yacht passengers are expected to land in Antarctica on commercially-organized tour vessels and 1,050 on land-based expeditions. Another 9,200 are anticipated on cruise-only programs and 1,100 on overflights (see Appendix C).
- 6.2 Activities of non-Members continue to be of concern to IAATO. Two non-members, both of which have the capacity to carry 500+ passengers plan to make landings in Antarctica over the course of 7 departures. These 7 departures by ships have the potential to land at least 500-550 passengers per voyage (as has occurred for over ten seasons).
- 6.3 Aerovias DAP is planning on flying passengers from Punta Arenas to Frei/Marsh Station on King George Island and either offering a day trip or overnight at Frei/Marsh. In addition, there are 5 fly/cruise programs that include a flight from Punta Arenas to King George Island where passengers embark a ship (at Frei), sail and make landings in the Antarctic Peninsula for six days before flying back to Punta Arenas.
- 6.4 IAATO has not been informed of possible activities in Dronning Maud Land during the 2007-2008 season.
- 6.5 Some National Program vessels carry fare-paying passengers for tourist-related activities. National Programs are encouraged to co-ordinate with IAATO in advance of the season to ensure the principle of one ship at one site at one time. In addition they are encouraged to report their passenger numbers and activities if they are landing at typical tourist sites so IAATO can attempt to account for the “footprint” and address cumulative impact issues.

Antarctic Tourism Trends

- 7.1 A trends chart showing the change in tourism from the 1992-1993 season to the 2006-2007 season can be found in Appendix B of this paper.
- 7.2 The following data sheets are being prepared for inclusion in the IAATO website (<http://www.iaato.org>) under the category of “Tourism Statistics”:
 - Tourists by Nationality (Landed)
 - Tourists by Nationality (Air and Cruise)
 - Tourists by Nationality (All)
 - Tourist Nationalities by Vessel
 - Trends 1992-2007
 - 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 will be posted once the statistics have been finalized.

8.0 Conclusion

In practice, and as long as the information is available to the IAATO Secretariat, all tour operators – whether or not Members of IAATO – will be included in the exchange of emergency contact information, ship scheduling and in the reporting of tourist-related statistics. IAATO recommends that all tourist activities be transparent so that complete and effective reporting can provide a strong base for tourism regulation by Treaty Parties and management by IAATO.

IAATO assumes that Antarctic tourism will continue to grow both in seaborne activities and to a lesser degree by land-based activities. The increase in numbers, however, does not necessarily reflect direct or significant environmental impacts. IAATO is committed to effectively managing Antarctic tourism given the yearly increase of tourism.

IAATO as an organization is focused on minimizing environmental impacts and consequently evaluates all relevant tourist activities. Despite the increase in numbers, IAATO believes that Member activities continue to have no more than a minor or transitory impact on the Antarctic environment.

Appendices:

- A Overview of Antarctic Tourism 2006-2007
- B 1992 - 2007 Antarctic Tourist Trends – Landed
- C IAATO Preliminary Estimate of Antarctic Tourism 2007-2008

Appendix A: Overview of Antarctic Tourism 2006-2007

Overview of Antarctic Tourism 2006-2007*Based on Information provided by Antarctic Tour Operators to the IAATO Secretariat as of April 18, 2007***IAATO Members Seaborne Tourism – Peninsula Region – 2006-2007**

Vessel	Registry of Vessel	Operator/Charterer	Country	Passenger Capacity	Actual # of Voyages	Actual # of Passengers	Activities incl. Landings
Traditional Vessels							
<i>Akademik Ioffe</i>	Russia	Peregrine Shipping	Australia	110	9	847	Zodiac, kayak, camping, climbing
<i>Akademik Sergey Vavilov</i>	Russia	Peregrine Shipping	Australia	100	9	810	Zodiac, kayak, camping, climbing
<i>Akademik Shokalskiy</i>	Russia	Quark Expeditions	United States	48	10	398	Zodiac, camping, kayaking - activities vary between voyages
<i>Aleksey Maryshev</i>	Russia	Oceanwide Expeditions	Netherlands	50	11	493	Zodiac, Scuba
<i>Andrea</i>	Liberia	Elegant Cruises	United States	100	9	721	Zodiac
<i>Antarctic Dream</i>	Chile	Antarctic Shipping	Chile	78	11	607	Zodiac
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V.	Netherlands	38	5	186	Zodiac
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	4	573	Zodiac
<i>Clipper Adventurer</i>	Bahamas	Clipper Cruise Line	United States	122	4	433	Zodiac
<i>Clipper Adventurer</i>	Bahamas	Zegrahm Expeditions	United States	122	2	211	Zodiac
<i>Corinthian II</i>	Malta	Travel Dynamics	United States	114	6	605	Zodiac
<i>Delphin</i>	Bahamas	Hansa Kreuzfahrten	Germany	500	2	666	Zodiac
<i>Explorer</i>	Liberia	G.A.P. Adventures	Canada	108	12	1,180	Zodiac
<i>Explorer II</i>	Bahamas	Abercrombie & Kent/Atholl Shipping	United States	199	9	1,676	Zodiac
<i>Explorer II (Alexander von Humboldt)</i>	Bahamas	Abercrombie & Kent/Atholl Shipping/Phoenix	United States	420	2	590	Zodiac
<i>Grigoriy Mikheev</i>	Russia	Oceanwide Expeditions	Netherlands	46	8	312	Zodiac
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	184	5	792	Zodiac
<i>Kapitan Khlebnikov</i>	Russia	Quark Expeditions	United States	112	3	307	Zodiac, helicopter
<i>Le Diamant</i>	France	Compagnie Des Iles Du Ponant	France	199	4	705	Zodiac
<i>National Geographic Endeavour</i>	Bahamas	Lindblad Expeditions	United States	118	8	909	Zodiac, kayaking, ROV
<i>Nordnorge</i>	Norway	Hurtigruten Group ASA	Norway	350	10	2,675	Polar Circle Boats
<i>Nordkapp</i>	Norway	Hurtigruten Group ASA	Norway	350	5	1,398	Polar Circle Boats
<i>Orlova</i>	Malta	Quark Expeditions	United States	108	12	1,204	Zodiac

IAATO Members Seaborne Tourism–Peninsula Region – 2006–2007 (Continued)

Vessel	Registry of Vessel	Operator/Charterer	Country	Passenger Capacity	Actual # of Voyages	Actual # of Passengers	Activities incl. Landings
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	10	536	Zodiac, kayak, scuba, camping, mountaineering
<i>Polar Star</i>	Barbados	Polar Star Expeditions	Norway	105	10	852	Zodiac
<i>Professor Molchanov</i>	Russia	Quark Expeditions	United States	48	9	425	Zodiac
<i>Professor Molchanov</i>	Russia	Oceanwide Expeditions	Netherlands	52	1	44	Zodiac
<i>Professor Multanovskiy</i>	Russia	Quark Expeditions	United States	48	10	453	Zodiac, kayak, camping - activities vary between voyages
<i>Saga Rose</i>	Bahamas	Saga Shipping	United Kingdom	570	1	434	Polar Circle Boats
<i>Sarpik Ittuk</i>	Bahamas	Quark Expeditions	United States	84	12	882	Zodiac
<i>The World</i>	Bahamas	ResidenSea	United States	650	1	300	Zodiac
<i>Ushuaia</i>	Panama	Antarpply Expeditions	Argentina	84	10	738	Zodiac, camping
<i>Ushuaia</i>	Panama	Cheesemans' Ecology Safaris	United States	84	1	75	Zodiac
<i>Vista Mar</i>	Spain	plantours and Partner	Germany	280	2	508	Zodiac
Total					227	23,545	

Air/Cruise							
<i>Grigoriy Mikheev (Air/Cruise)</i>	Russia	Antarctica XXI	Chile	57	6	174	Fly to King George Island, Cruise, Zodiac
Total					6	174	

Sailing Vessels							
<i>Australis</i>	Australia	Ocean Expeditions	Australia	9	3	23	Zodiac, kayak, climbing
<i>Golden Fleece</i>	Falkland Islands	Golden Fleece Expeditions	Falkland Islands	10	1	6	Zodiac
<i>Le Sourire</i>	Argentina	Le Sourire Expeditions	France	8	1	8	Zodiac
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	2	8	Zodiac, scuba, climbing
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	10	2	18	Zodiac, scuba, climbing
<i>Santa Maria</i>	Germany	Sea and Ice and Mountain Adventures	Chile	6	1	5	Zodiac, kayak, climbing, activities vary
<i>Santa Maria Australis</i>	Germany	Sea and Ice and Mountain Adventures	Chile	9	3	21	Zodiac, kayak, climbing, activities vary
<i>Seal</i>	USA	Sterna Corporation	United States	6	1	6	Zodiac
<i>Tooluka</i>	Netherlands	BV Tooluka	Netherlands	6	1	5	Zodiac
<i>Vaiheré</i>	France	Latitude Oceané	France	10	3	28	Zodiac, scuba
Total					18	128	

IAATO Members Seaborne Tourism – Peninsula Region - 2006-2007 (Continued)

Large Ships Cruise Only							
<i>Crystal Serenity</i>	Bahamas	Crystal Cruises	United States	1,100	1	941	Cruise Only
<i>Deutschland</i>	Germany	Peter Deilmann Reederei	Germany	520	1	457	Cruise Only
<i>Golden Princess</i>	Bermuda	Princess Cruises	United States	3,100	1	2,425	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	793	1	707	Cruise Only
<i>Rotterdam</i>	Netherlands	Holland America	United States	1,316	2	2,400	Cruise Only
Total					6	6,930	

IAATO Members Seaborne Tourism – Continental/Ross Sea – 2006-2007

Vessel	Vessel Registry	Operator/Charterer	Country	Passenger Capacity	Actual # Voyages	Actual # of Passengers	Activities incl. Landings
<i>Kapitan Khlebnikov</i>	Russia	Quark Expeditions	United States	112	2	195	Zodiac, helicopter
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	106	3	284	Zodiac
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	48	3	144	Zodiac, hovercraft
Total					8	623	

IAATO Members Air/Land Based Tourism - 2006-2007

Operator	Country	Antarctic Area Visited	Aircraft Used	Actual # of Departures	Actual # of Passengers	Activities
<i>Adventure Network International/ Antarctic Logistics and Expeditions</i>	United States	Patriot Hills, South Pole	Ilyushin 76, Twin Otter	16	204	Camping, climbing, skiing
<i>Aerovias DAP</i>	Chile	King George Island	King Air, Dash 7	40	704	Station Visits, extended walks These numbers also include science personnel
Total				56	908	

IAATO Members Air/Overflights – 2006-2007

Operator	Country	Antarctic Area Visited	Aircraft Used	Actual # of Flights	Actual # of Passengers	Activities
<i>LAN Airlines</i>	USA, Chile and Argentina	King George Island, Deception Island, O'Higgins, Marambio	Boeing 737-200	8	360	Overflights, no landings
<i>Croydon Travel</i>	Australia	Northern Victoria Land, Oates, George V, Adélie Land	Boeing 747-400	2	686	Overflights, no landings
Total				10	1046	

Non-IAATO Operators-Government Supported Air/Land-Based Tourism – 2006-2007

Operator	Country	Antarctic Area Visited	Aircraft or Vessel Used	Actual # of Departures	Actual # of Tourists	Activities
<i>Antarctic Logistics Company International</i>	Russia and South Africa	Dronning Maud Land, Novola zarevskaya	Ilyushin-76	unknown	unknown	Climbing, skiing, station visits
<i>Uruguay</i>	Uruguay	King George Island, Artigas Station	Varies	2	9	Station visits, extended walks

Non-IAATO Small/Large Cruise Vessels – Peninsula with Landings - 2006-2007

Vessel	Vessel Registry	Operator/Charterer	Country	Passenger Capacity	Actual # Voyages	Actual # of Passengers	Activities incl. Landings	Post Visit Report Forms
<i>Artigas</i>	Uruguay	DAP Mares	Chile	Unknown	1	unknown	Cargo transport, Zodiac, helicopter	No
<i>Marco Polo</i>	Bahamas	Orient Lines	United States	800	4	1,985	Zodiac	Yes
<i>Discovery</i>	Bermuda	Discovery World Cruises	United States	650	3	1,682	Zodiac	Yes
<i>Astor</i>	Bahamas	Transocean Tours	Germany	590	1	485	Zodiac	Yes
Total					9	4,152		

Additional Note on Non-IAATO Vessels:

During the season there were both small and large luxury yachts that sailed to Antarctica that were not part of the IAATO network. Information on these vessels should be obtained through the Antarctic Treaty Parties Exchange of Information. A request was made for copies of the applicable Post Visit Site Reports but none have yet been received, therefore they were not included in this overview.

**SUMMARY OF ESTIMATES for 2006-2007 SEASON
(All Forms of Tourism)**

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

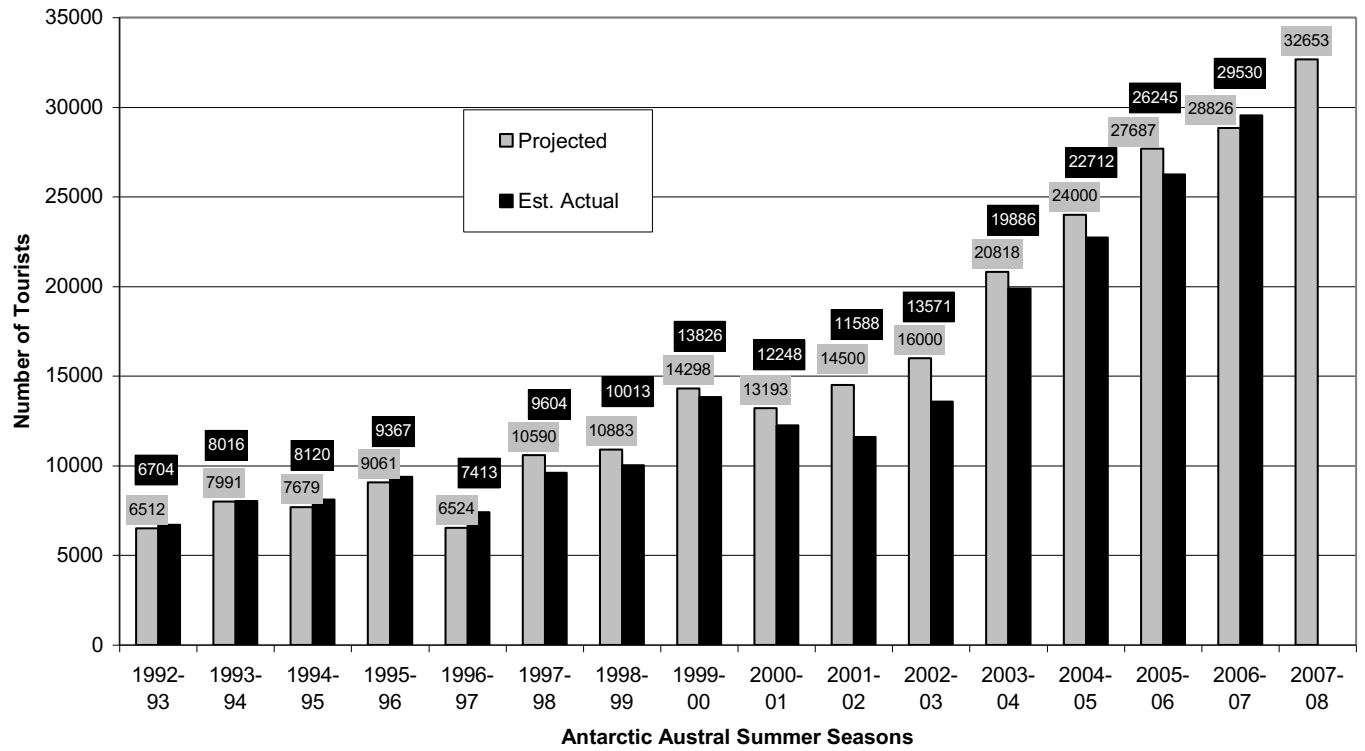
Types of Tourism	Number of Vessels or Aircraft	Number of Departures	Total Number of Passengers (not including officers, staff, crew)
IAATO Seaborne Traditional Tourism/Peninsula	30	227	23,545
IAATO Seaborne Traditional Tourism/Ross Sea Continental Voyages	3	8	623
IAATO Sailing Vessels/Yacht Operators	10	18	128
IAATO Air/Cruise	1	6	174
IAATO Large Ship Cruise-Only/Peninsula	5	6	6,930
Non IAATO Small Sailing Vessels/Yacht Based Tourism/Peninsula	Unknown	unknown	unknown
Non-IAATO Small and Large Cruise Ship/Landing/Peninsula	4	9	4,152
IAATO Air/Land-Based Tourism	Varies	56	908
Non IAATO Air/Land-Based/DML	Varies	unknown	unknown
IAATO Member Air/Overflights/Peninsula	1	8	360
IAATO Member Air/Overflights/Continental	1	2	686

Total Visitor Estimates for 2006-2007 Season:

Seaborne Traditional Tourism (with landings)	28,448
Seaborne Tourism Cruise-Only (no landing)	6,930
Air/Cruise	174
Air/Land-Based 'Traditional' Tourism	908
Over flights (no landing)	1,046
Total	37,506

Appendix B: Antarctic Tourist Trends (Landed)

1992-2007 ANTARCTIC TOURIST TRENDS - Landed (Includes Ship and Land-based passenger numbers. 1997-98 onwards includes some commercial yacht activity)
 April 24, 2007



Appendix C. IAATO Preliminary Estimate of Antarctic Tourism 2007 - 2008

IAATO Preliminary Estimate of Antarctic Tourism 2007-2008

Based on Information provided by Antarctic Tour Operators to the IAATO Secretariat as of April 20, 2007

IAATO Members Seaborne Tourism – Peninsula Region – 2007-2008

Vessels	Vessel Registry	Operator/Charterer	Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Traditional Vessels								
<i>Akademik Ioffe</i>	Russia	Peregrine Shipping	Australia	110	9	80	720	Zodiac, kayak, camping, climbing
<i>Akademik Sergey Vavilov</i>	Russia	Peregrine Shipping	Australia	100	9	80	720	Zodiac, kayak, camping, climbing
<i>Akademik Shokalskiy</i>	Russia	Quark Expeditions	United States	48	11	42	462	Zodiac, camping, kayaking - activities vary
<i>Aleksey Maryshev</i>	Russia	Oceanwide Expeditions	Netherlands	50	11	42	462	Zodiac, scuba
<i>Andrea</i>	Liberia	Elegant Cruises	United States	100	11	90	990	Zodiac
<i>Antarctic Dream</i>	Chile	Antarctic Shipping	Chile	78	12	40	480	Zodiac, helicopter
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	38	5	38	190	Zodiac
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	5	130	650	Zodiac
<i>Clipper Adventurer</i>	Bahamas	Clipper Cruise Line	United States	122	5	110	550	Zodiac
<i>Clipper Adventurer</i>	Bahamas	Zegrahm Expeditions	United States	122	2	110	220	Zodiac
<i>Corinthian II</i>	Malta	Travel Dynamics	United States	114	6	90	540	Zodiac
<i>Delphin</i>	Bahamas	Hansa Kreuzfahrten	Germany	500	2	325	650	Zodiac
<i>Explorer</i>	Liberia	G.A.P Adventures	Canada	108	11	95	1,045	Zodiac
<i>Explorer II</i>	Bahamas	Abercrombie & Kent/Atholl Shipping	United States	199	9	190	1,710	Zodiac
<i>Explorer II (Alexander von Humboldt)</i>	Bahamas	Abercrombie & Kent/Atholl Shipping/Phoenix Reisen GmbH	United States	420	1	250	250	Zodiac
<i>Grigoriy Mikheev</i>	Russia	Oceanwide Expeditions	Netherlands	46	8	39	312	Zodiac
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	184	5	150	750	Zodiac
<i>Kapitan Khlebnikov</i>	Russia	Quark Expeditions	United States	112	3	90	270	Zodiac, helicopter
<i>Kapitan Khlebnikov</i>	Russia	Zegrahm Expeditions	United States	112	1	90	90	Zodiac, helicopter
<i>Le Diamant</i>	France	Compagnie Des Iles Du Ponant	France	199	5	160	800	Zodiac
<i>National Geographic Endeavour</i>	Bahamas	Lindblad Expeditions	United States	118	10	100	1,000	Zodiac, kayaking, ROV
<i>Nordnorge</i>	Norway	Hurtigruten Group ASA	Norway	350	10	300	3,000	Polar Circle Boats
<i>Fram</i>	Norway	Hurtigruten Group ASA	Norway	320	12	270	3,240	Polar Circle Boats
<i>Orlova</i>	Malta	Quark Expeditions	United States	108	12	95	1,140	Zodiac
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	10	50	500	Zodiac, scuba, camping, kayak mountaineering

IAATO Members Seaborne Tourism – Peninsula Region - 2007-2008 (Continued)

Vessel	Vessel Registry	Operator/Charterer	Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Polar Star</i>	Barbados	Polar Star Expeditions	Norway	105	8	85	680	Zodiac
<i>Polar Star</i>	Barbados	Cheeseman's Ecology Safaris	United States	105	1	85	85	Zodiac
<i>Professor Molchanov</i>	Russia	Oceanwide Expeditions	Netherlands	52	11	42	462	Zodiac
<i>Professor Multanovskiy</i>	Russia	Quark Expeditions	United States	48	11	42	462	Zodiac, kayak, camping - activities vary
<i>Saga Ruby</i>	UK	Saga Shipping	United Kingdom	664	1	499	499	Polar Circle Boats
<i>Spirit of Adventure</i>	Bahamas	Saga Shipping	United Kingdom	352	2	225	450	Zodiacs
<i>Ocean Nova (formerly Sarpik Ittuk)</i>	Bahamas	Quark Expeditions	United States	82	12	75	900	Zodiac
<i>Ushuaia</i>	Panama	Antarpply Expeditions	Argentina	84	10	80	800	Zodiac
<i>Ushuaia</i>	Panama	Fathom Expeditions	Canada	84	1	80	80	Zodiac
<i>Vista Mar</i>	Italy	Plantours and Partner	Germany	280	3	260	780	Zodiac
Total					245		25,939	

Air/Cruise								
<i>Grigoriy Mikheev (Air/Cruise)</i>	Russia	Antarctica XXI	Chile	57	5	40	200	Fly to King George Island, Cruise, Zodiac
Total					5		200	

Sailing Vessels								
<i>Australis</i>	Australia	Ocean Expeditions	Australia	9	3	9	27	Zodiac, kayak, climbing
<i>Golden Fleece</i>	Falkland Islands	Golden Fleece Expeditions	Falkland Islands	10	1	8	8	Zodiac
<i>Kotick</i>	France	Kotick Charters Ltd	France	4	1	4	4	Zodiac
<i>Le Sourire</i>	Argentina	Le Sourire Expeditions	France	8	1	6	6	Zodiac
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	1	6	6	Zodiac, scuba, climbing
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	10	2	8	16	Zodiac, scuba, climbing
<i>Santa Maria Australis</i>	German	Sea and Ice Mountain Adventures	Chile	9	3	8	24	Zodiac, kayak, climbing, activities vary
<i>Seal</i>	USA	Sterna Corporation	USA	6	1	6	6	Zodiac,
<i>Tooluka</i>	Netherlands	BV Tooluka	Netherlands	6	2	5	10	Zodiac
<i>Vaiheré</i>	France	Latitude Oceané	France	10	3	10	30	Zodiac, scuba
Total					18		137	

Large Ships Cruise Only	Vessel Registry	Operator/Charterer	Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Star Princess</i>	Bermuda	Princess Cruises	United States	2,600	2	1,400	2,800	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America	United States	793	1	700	700	Cruise Only
<i>Rotterdam</i>	Netherlands	Holland America	United States	1,316	3	1,200	3,600	Cruise Only
<i>Artemis (formally the Royal Princess)*</i>	Bermuda	P&O Cruises	United Kingdom	1650	1	1650	1,188	Cruise Only
<i>Celebrity Journey*</i>	Bahamas	Celebrity Cruises	United States	700	2	650	1,300	Cruise Only
<i>Topaz*</i>	Panama	Peace Boat	Japan	1,100	1	800	800	Cruise Only
Total					10		10,388	

* IAATO member application in progress

IAATO Members Seaborne Tourism – Continental/Ross Sea - 2007-2008

Vessel	Vessel Registry	Operator/Charterer	Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Kapitan Khlebnikov</i>	Russia	Quark Expeditions	United States	112	1	75	75	Zodiac, helicopter
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	106	3	100	300	Zodiac
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	48	3	48	144	Zodiac, hovercraft
Total					7		519	

IAATO Members Air/Land Based Tourism - 2007-2008

Operator	Country	Antarctic Area Visited	Aircraft Used	Est. # of Departures	Est. Average Load	Est. # of Passengers	Activities
<i>Adventure Network International/ Antarctic Logistics and Expeditions</i>	United States	Patriot Hills, South Pole	Ilyushin IL 76, Twin Otter,	16	varies	250	Camping, climbing, skiing, marathon
<i>Aerovias DAP</i>	Chile	King George Island	King Air, Dash 7	Varies	Varies	800	Station Visits, extended walks These numbers also include science personnel
Total				Varies		1,050	

IAATO Members Air/Overflights - 2007-2008

Operator	Country	Antarctic Area Visited	Aircraft used	Est. # of Departures	Est. Average Load	Est. # of Passengers	Activities
<i>LAN Airlines</i>	Chile	King George Island, Deception Island, O'Higgins, Marambio	Boeing 737-200	8	50	400	Overflights, no landings
<i>Croydon Travel</i>	Australia	Northern Victoria Land, Oates, George V, Adélie Land	Boeing 747-400	2	350	700	Overflights, no landings
Total				10		1,100	

Non-IAATO Operators-Government Supported Air/Land-Based Tourism - 2007-2008

Operator	Country	Antarctic Area Visited	Aircraft or Vessel Used	Est.# of Departures	Est. Average Load	Probable # of Tourists	Activities
<i>Antarctic Logistics Company International</i>	Russia and South Africa	Dronning Maud Land, Novolazarevskaya	Ilyushin-76	unknown	unknown	unknown	Climbing, skiing, station visits
<i>Uruguay</i>	Uruguay	King George Island, Artigas Station	Varies	unknown	unknown	unknown	Station visits, extended walks

Non-IAATO Small/Large Cruise Vessels - Peninsula with Landings - 2007-2008

Vessel	Vessel Registry	Operator/Charterer	Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
<i>Marco Polo</i>	Bahamas	Norwegian Cruise Lines	United States	800	4	500	2,000	Zodiac, Landing
<i>Discovery</i>	Bermuda	Discovery World Cruises	United States/ United Kingdom	650	3	550	1,650	Zodiac, Landing
<i>Ship similar to Arielle</i>	Greece	Louis Cruises	Greece	1158	1	1158	1158	Landing
Total					8		4,808	

*Note: Not included in the above are the following small vessels intending to apply for IAATO Membership: *Absinthe*, *Sarsen*, *Spirit of Sydney*, and *Tiama*. This Appendix will be updated as application are received.

**SUMMARY OF ESTIMATES for 2007-2008 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 (not including officers, staff, crew)
IAATO Seaborne Traditional Tourism/Peninsula	30	245	25,939
IAATO Seaborne Traditional Tourism/Ross Sea Continental Voyages	3	7	519
IAATO Sailing Vessels/Yacht Operators	10	20	137
IAATO Air/Cruise	1	5	200
IAATO Large Ship Cruise-Only/Peninsula	6	10	10,388
Non IAATO Yacht Based Tourism/Peninsula	unknown	unknown	unknown
Non-IAATO Small and Large Cruise Ship/Landing/Peninsula	3	8	4,808
IAATO Air/Land Based Tourism	varies	varies	1,050
Non IAATO Air/Land Based/DML	unknown	unknown	unknown
IAATO Member Air/Overflights/Peninsula	1	11	400
IAATO Member Air/Overflights/Continental	1	2	700

Total Preliminary Visitor Estimates for 2007-2008 Season:

Seaborne Traditional Tourism (with landings)	31,403
Seaborne Tourism Cruise-Only (no landing)	10,388
Air/Cruise	200
Air/Land-Based 'Traditional' Tourism	1,050
Overflights (no landing)	1,100
Total	44,141