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IAATO Overview of Antarctic Tourism: 2008-2009 Antarctic Season and Preliminary Estimates for 2009-2010 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 a brief initial overview of Antarctic tourism for the 2008-2009 season, and estimates for the 2009-2010 season.

Because of the early timing of ATCM XXXII, it has not been possible to compile or analyze in detail the statistical data for the 2008-2009 season. It is expected that this information will be available in June 2009, and will be posted on the IAATO website (www.iaato.org) under *Information Papers*.

It is, however, possible to give an estimated general picture of the 2008-2009 Antarctic tourism season on the basis of preliminary information only. For comparison purposes, the total number of visitors for the 2007-2008 season, including those partaking in over-flights and cruise-only voyages, was reported by IAATO to be 46,265 (ATCM XXXI IP 85 *IAATO Overview of Antarctic Tourism 2007-2008 Antarctic Season and Preliminary Estimates for 2008-2009 Antarctic Season*). This number is expected to drop sixteen percent to approximately 38,900 including over-flights and cruise-only visitors (counting IAATO Member passengers only) for the 2008-2009 season. It is worthwhile noting that this number is eight percent below the 42,298 that IAATO members had projected in June 2008 for the 2008-2009 season.

Detailed estimates for the 2009-2010 season can be found in Appendix B of this paper. Overall, these estimates indicate a total of 42,964 visitors. In light of the current economic climate, these estimates could be considered optimistic.

1.0 Overview

1.1 IAATO Member Activities

As during the past 18 seasons, IAATO membership continues to incorporate the majority of all known Antarctic tour operators. All IAATO 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 Scope of Commercial Tourist Activities for Seaborne Tourism

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

Appendices to this information paper provide further details of scope of the IAATO-member activities, including vessels/aircraft, departures, passenger numbers and activities. The Appendices are as follows:

- Appendix A: Histogram of 1992-2009 Antarctic Tourist Trends – Landed Passengers, including ship- and land-based passenger numbers;
- Appendix B: Preliminary Estimate of Antarctic Tourism 2009-2010.

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

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

Year	# of Operators or Charterers	# of Ships & Yachts	# of Voyages	# of Passengers Making Landings	# of Cruise Only Passengers
1992-93	10	12	59	6,704	
1993-94	9	11	65	7,957	
1994-95	9	14	93	8,098	
1995-96	10	15	113	9,212	
1996-97	11	13	104	7,322	
1997-98	12	13**	92*	9,473	
1998-99	15	15**	116	9,857	
1999-00	17	21**	154	13,687	936
2000-01	15**	32**	131*	12,109	0
2001-02	19**	37**	117*	11,429	2,029
2002-03	26**	47**	136*	13,263	2,424
2003-04	31**	51**	180*	19,369	4,949
2004-05	35**	52**	207*	22,297	5,027
2005-06	47**	44**	249*	25,167	4,632
2006-07	42**	47**	268*	28,622	6,930
2007-08	48*	55*	308*	32,198	13,015
2008-09	TBA	TBA	TBA	TBA	TBA

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

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

The vast majority of commercially-operated voyages operate in the Antarctic Peninsula region during the six-month austral summer season (from mid-October to early April), departing from Ushuaia or, to a lesser extent, from other ports north of the Treaty areas.

2.0 Preliminary Estimate of Planned Activities for the 2009-2010 Season

Appendix B illustrates a breakout of tourism categories that are projected for the 2009-2010 season. The estimate is based on information provided to the IAATO Secretariat at the time this report was submitted.

For the 2009-2010 season, ship-based tourism is expected to again include the operation of small auxiliary boats (Zodiac, Polar Circle Boat, R.I.B, Naiad, etc.), shore landings, kayaking, mountain climbing, running events, SCUBA, diving, skiing, snowboarding, camping, helicopter operations and use of an underwater ROV.

2.1 IAATO Member Activity

According to estimates provided to IAATO by members, 25,258 seaborne and yacht (sailing and motor) passengers are expected to land in Antarctica from commercially-organized vessels, 450 from combination air-cruise programs, and 225 on air or land-based expeditions during the 2009-2010 season. Another 16,631 are anticipated on cruise-only programs and 400 on over-flights (see Appendix B).

3.0 Antarctic Tourism Trends

A trends chart showing the change in tourism dating from the 1992-1993 season, with estimate for both the 2008-2009 and 2009-2010 seasons, can be found in Appendix A of this paper.

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 datasheets will be posted once the statistics have been finalized in June 2009.

4.0 Conclusion

In practice, and as long as the information is available to the IAATO Secretariat, all tour operators – whether Members of IAATO or not – will be included in the exchange of emergency contact information, coordination of landing activities and in the subsequent reporting of tourist-related statistics. IAATO recommends that all tourist activities be transparent by means of complete reporting, since effective tourism management by Treaty Parties and IAATO is based on a robust database.

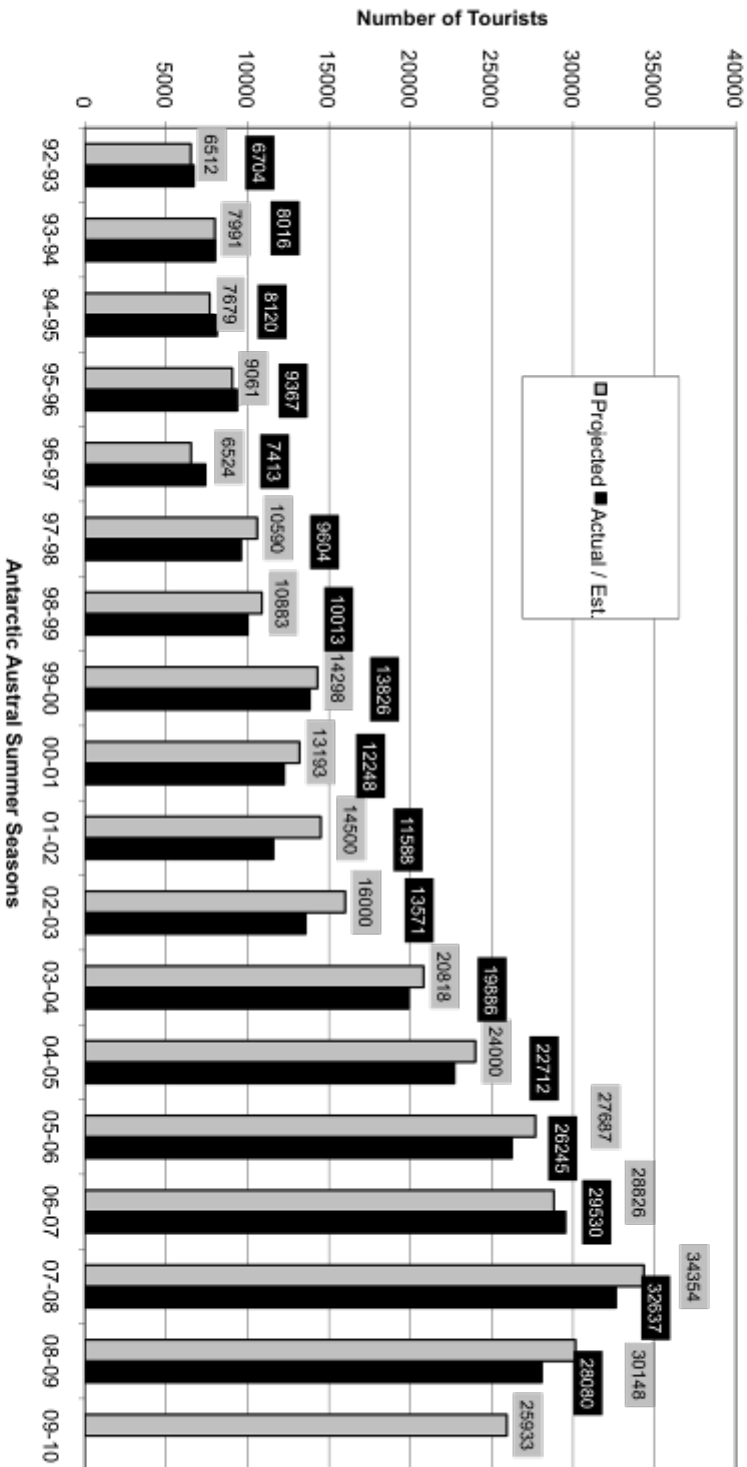
IAATO remains committed to effectively managing Antarctic tourism and, as an organization, is focused on minimizing environmental impacts and consequently evaluates all relevant tourist activities. On the basis of that evaluation, IAATO believes that member activities continue to have no more than a minor or transitory impact on the Antarctic environment.

Appendices:

- A Histogram of 1992-2009 Antarctic Tourist Trends – Landed Passengers, including ship- and land-based passenger numbers.
- B Preliminary Estimates of Antarctic Tourism 2009-2010.

Appendix A

1992-2009 ANTARCTIC TOURIST TRENDS - Landed Passengers
 Includes Ship and Land-based passenger numbers.
 1997-98 onwards includes some small sailing yachts or motor vessels
 March 6, 2009



Appendix B: Preliminary Estimate of Antarctic Tourism 2009-2010

Based on Information provided by IAATO Members to the IAATO Secretariat as of March 6, 2009

IAATO Members Seaborne Tourism – Peninsula Region – 2009-2010

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Traditional Vessels								
<i>Akademik Ioffe</i>	Russia	Quark Expeditions	United States	110	9	68	612	Zodiac, kayak, camping, climbing
<i>Akademik Sergey Vavilov</i>	Russia	Quark Expeditions	United States	100	10	68	680	Zodiac, kayak, camping, climbing
<i>Akademik Shokalskiy</i>	Russia	Quark Expeditions	United States	48	10	32	320	Zodiac, kayak, camping, diving
<i>Alexander von Humboldt II</i>	Bahamas	Phoenix Reisen	Germany	470	2	310	620	Zodiac
<i>Antarctic Dream</i>	Chile	Antarctic Shipping	Chile	80	13	38	494	Zodiac
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V.	Netherlands	48	5	35	175	Zodiac
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	4	130	520	Zodiac
<i>Clelia II</i>	Malta	Travel Dynamics	United States	100	6	80	480	Zodiac
<i>Clipper Adventurer</i>	Bahamas	Quark Expeditions	United States	122	11	80	880	Zodiac
<i>Corinthian II</i>	Malta	Travel Dynamics	United States	100	8	80	640	Zodiac
<i>Delphin</i>	Bahamas	Hansa Kreuzfahrten	Germany	375	3	350	1050	Zodiac
<i>Expedition</i>	Liberia	GAP Adventure	Canada	120	12	100	1200	Zodiac
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	260	12	230	2760	Polar Circle Boats
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	184	5	150	750	Zodiac

IAATO Members Seaborne Tourism – Peninsula Region – 2009-2010

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Traditional Vessels								
<i>Kapitan Khlebnikov</i>	Russia	Quark Expeditions	United States	108	4	68	272	Zodiac, helicopter
<i>Le Diamant</i>	France	Compagnie Des Iles Du Ponant	France	226	5	199	995	Zodiac
<i>Le Diamant</i>	France	Zegrahm Expeditions	United States	220	1	165	165	Zodiac
<i>Lyubov Orlova</i>	Avatiu	Quark Expeditions	United States	108	11	70	770	Zodiac
<i>Marco Polo</i>	Bahamas	Transocean Tours	Germany	500	3	500	1500	Zodiac
<i>Minerva (Cat 1)</i>	Bahamas	Abercrombie & Kent	United States	200	7	200	1400	Zodiac
<i>Minerva (Cat 2)</i>	Bahamas	Abercrombie & Kent	United States	300	1	300	300	Zodiac
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	148	9	115	1035	Zodiac, kayak
<i>Ocean Nova</i>	Bahamas	Quark Expeditions	United States	82	10	45	450	Zodiac
<i>Plancius</i>	Netherlands	Oceanwide Expeditions	Netherlands	112	5	60	300	Zodiac, Kayak, Camping, Hiking
<i>Plancius</i>	Netherlands	One Ocean Expeditions	Canada	106	3	80	240	Zodiac
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	10	48	480	Zodiac
<i>Polar Star</i>	Barbados	Polar Star Expeditions	Norway	105	8	65	520	Zodiac
<i>Polar Star</i>	Barbados	Cheeseman's Ecology Safaris	United States	94	1	85	85	Zodiac
<i>Prince Albert II</i>	Bahamas	Silversea Cruises	United States	132	10	100	1000	Zodiac
<i>Princess Daphne*</i>	Madeira	World Cruise Agencies (*membership pending)	Portugal	450	3	425	1275	Zodiac

IAATO Members Seaborne Tourism – Peninsula Region – 2009-2010

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Traditional Vessels								
<i>Professor Molchanov</i>	Russia	Oceanwide Expeditions	Netherlands	52	10	42	420	Zodiac, Hiking, Diving
<i>Professor Molchanov</i>	Russia	Waterproof Expeditions	Netherlands	52	2	45	90	Zodiac
<i>Professor Multanovskiy</i>	Russia	Oceanwide Expeditions	Netherlands	52	10	42	420	Zodiac, diving
<i>Sarsen</i>	Australia	Moir Holdings	Australia	12	2	12	24	Polar Circle Boats
<i>Ushuaia</i>	Panama	Antarpply Expeditions	Argentina	84	12	75	900	Zodiac
<i>Ushuaia</i>	Panama	Students on Ice	Canada	84	1	80	80	Zodiac
<i>Vistamar</i>	Spain	plantours & Partner GmbH	Germany	290	2	250	500	Zodiac
Total					240		24402	

IAATO Members Seaborne Tourism - Peninsula Region 2009-2010

Air/Cruise								
<i>Professor Multanovskiy</i>	Russia	Antarctica XXI	Chile	52	9	50	450	Zodiac
Total					9		450	

IAATO Member Yachts (all regions) 2009-2010

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Yachts								
<i>Australis</i>	Australia	Ocean Expeditions	Australia	9	3	9	27	Zodiac, kayak, climbing
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK	9	2	6	12	Zodiac
<i>Hanse Explorer</i>	Antigua	Oceanstar	Germany	12	5	12	60	Zodiac

IAATO Member Yachts (all regions) 2009-2010

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Yachts								
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	1	6	6	Zodiac, diving, climbing
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	10	4	8	32	Zodiac, diving, climbing
<i>Philos</i>	Australia	Ocean Expeditions	Australia	5	2	5	10	Zodiac
<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	2	4	8	Zodiac
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	8	2	6	12	Zodiac
<i>Vaiheré</i>	France	Latitude Oceané	France	10	2	10	20	Zodiac
<i>Vessel details not known yet.</i>	tba	High Latitudes	United Kingdom	10	1	10	10	Zodiac
<i>Xplore</i>	Panama	Xplore Expeditions	Panama	10	2	8	16	Zodiac
Total					29		237	

Vessels	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Cruise Only								
<i>Amsterdam</i>	Netherlands	Holland America Line	United States	1,340	1	1,100	1100	Cruise Only
<i>Celebrity Infinity</i>	Malta	Celebrity / Royal Caribbean	United States	1,950	2	1950	3900	Cruise Only
<i>Crystal Symphony</i>	Bahamas	Crystal Cruises	United States	975	1	900	900	Cruise Only

Vessels	Vessel Registry	Operator / Charterer	Country	Passenger Capacity	Est. # Voyages	Est. # Average Load	Est. # of Passengers	Activities incl. landings
Cruise Only								
<i>Deutschland</i>	Germany	Peter Deilmann Reederei Gmbh & Co.	Germany	360	1	360	360	Cruise Only
<i>Mona Lisa</i>	Bahamas	Peace Boat / Japan Grace	Japan	1,200	1	551	551	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America Line	United States	793	1	620	620	Cruise Only
<i>Regent Mariner</i>	Bahamas	Regent Seven Seas (*membership pending)	United States	700	1	700	700	Cruise Only
<i>Star Princess</i>	Bermuda	Princess Cruises	United States	2,600	2	2,600	5200	Cruise Only
<i>Veendam</i>	Netherlands	Holland America Line	United States	1,340	3	1,100	3300	Cruise Only
Total					13		16,631	

IAATO Members Seaborne Tourism – Continental/Ross Sea - 2009-2010

Vessels	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	108	1	68	68	Zodiac, helicopter
<i>Marina Svetaeva</i>	Russia	Aurora Expeditions	Australia	100	3	85	255	Zodiac, helicopter
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	106	2	100	200	Zodiac
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	48	2	48	96	Zodiac, hovercraft
Total					8		619	

IAATO Members Air/Land Based Tourism - 2009-2010

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-76, Twin Otter	Varies	Varies	225	Camping, climbing, skiing, marathon
<i>The Antarctic Company (TAC) - *Membership Pending</i>	Varies	Filchner Ice Shelf, South Pole	Ilyushin-76	unknown	unknown	unknown	Climbing, skiing, station visits
Total				Varies		225	

IAATO Members Air/Overflights - 2009-2010

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
Total				8		400	

**SUMMARY OF ESTIMATES for 2009-2010 SEASON
(All Tourist Types)**

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

Types of Tourism	Number of Vessels	Number of Departures	Total Number of Passengers
IAATO Seaborne Tourism Peninsula	37	240	24,402
IAATO Seaborne Tourism Ross Sea/Continental	4	8	619
IAATO Sailing Vessels/Yachts	11	29	237
IAATO Air/Cruise Peninsula	1	9	450
IAATO Large Ships Cruise-Only/Peninsula	9	13	16,631
IAATO Air/Land Based Tourism		varies	225
IAATO Member Air/Overflights/Peninsula		8	400

Total Preliminary Visitor Estimates for 2009-2010 Season:	
Seaborne Traditional Tourism (with landings)	25,258
Seaborne Tourism Cruise-Only (no landing)	16,631
Air/Cruise	450
Air/Land-Based 'Traditional' Tourism	225
Overflights (no landing)	400
Total	42,964