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IAATO Overview of Antarctic Tourism: 2008-2009 Antarctic Season and Preliminary Estimates for 2009-2010 Antarctic Season

IAATO Overview of Antarctic Tourism: 2008-2009 Antarctic Season and Preliminary Estimates for 2009- 2010 Antarctic Season

**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.

Compared with the total number of visitors for the 2007-2008 Antarctic tourism season (46,265), the number of visitors dropped 18.2% to 37,858 (counting IAATO Member passengers only) for the 2008-2009 season. Details of the 2008-2009 season can be found in Appendix 1 of this paper.

Updated estimates for the 2009-2010 season can be found in Appendix 3 of this paper. Overall, these estimates indicate a total of 36,997 visitors, lowered from the 42,964 forecast in March 2009. In light of the current economic climate, this revised estimate can still 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.

A summary of IAATO member activities for the 2008-2009 season is follows:

- 26,933 passengers landed from seaborne vessels in the Antarctic Treaty Area. Of this total:
 - 25,452 passengers landed in the Antarctic Peninsula area;
 - 1,022 passengers landed in the Ross Sea or Continental region of Antarctica;
 - 174 passengers sailed aboard yachts (sailing or motor) that carry 12 or fewer passengers to the Antarctic Peninsula;
 - 285 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 cruise for six days, making landings;
- 10,652 passengers traveled aboard large vessels operating “cruise-only” voyages, making no landings in the Antarctic Treaty Area;
- 273 clients participated in multi-day land-based expeditions in the continental interior, with IAATO’s one land-based operator;
- No passengers participated in IAATO-member over-flights from South America to the Antarctic Peninsula area.

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

Appendices:

- Appendix 1: Overview of Antarctic Tourism 2008-2009;
- Appendix 2: Histogram of 1992-2009 Antarctic Tourist Trends – Landed Passengers, including ship- and land-based passenger numbers (revised);
- Appendix 3: Preliminary Estimate of Antarctic Tourism 2009-2010 (revised)

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

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

Year	# of Operators or Charterers	# of Ships & Yachts	# of Voyages	# of Passengers Making Landings	# of Cruise Only Passengers
1992-93	10	12	59	6,704	
1993-94	9	11	65	7,957	
1994-95	9	14	93	8,098	
1995-96	10	15	113	9,212	
1996-97	11	13	104	7,322	
1997-98	12	13**	92*	9,473	
1998-99	15	15**	116	9,857	
1999-00	17	21**	154	13,687	936
2000-01	15**	32**	131*	12,109	0
2001-02	19**	37**	117*	11,429	2,029
2002-03	26**	47**	136*	13,263	2,424
2003-04	31**	51**	180*	19,369	4,949
2004-05	35**	52**	207*	22,297	5,027
2005-06	47**	44**	249*	25,167	4,632
2006-07	42**	47**	268*	28,622	6,930
2007-08	48*	55*	308*	32,637	13,015
2008-09	44*	53*	290*	26,921	10,652

* 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.

1.3 Nationalities

The Post Visit Report Forms submitted to IAATO indicate that at least 112 different nationalities were represented in tourists who visited Antarctica during the 2008-2009 season. Of these recorded visitors, the majority (85.8%) came from 10 different countries (see Table 2) with the remainder compiled from 102 other nationalities:

Table 2: Percentage of Known Passenger Nationalities

Nationality	Number of Visitors	% of total
United States	12,837	34.0%
United Kingdom	5,496	14.6%
Germany	3,842	10.2%
Australia	3,035	8.0%
Canada	2,350	6.2%
Netherlands	1,383	3.7%
Switzerland	1,151	3.1%
Japan	1,104	2.9%
France	739	1.9%
New Zealand	457	1.2%
Other	5,340	14.2%

1.4 Commercial Tour Vessels Operating in 2008-2009

A full list of IAATO member-operated commercial tour vessels that completed cruises to the Antarctic, including information on their registry, permitting authority and passenger capacity is given in Appendix 1. In total, there were 29 vessels carrying between 13-199 passengers and five vessels carrying between 200-500 passengers, plus five cruise-only vessels each carrying more than 500 passengers.

1.5 Commercial Yacht (Sailing and Motor) Activities

Based on Post Visit Reports from IAATO-member yacht operators, 174 passengers were reported to have traveled to the Antarctic Treaty Area aboard 11 commercially operated small yachts during the 2008-2009 season. This information is also detailed in Appendix 1.

Visits and activities by yachts not operated by IAATO members are not included in these statistics. IAATO continues to make available its *IAATO One-Off Private Expedition Yacht Package*, which details IAATO and ATS guidelines, procedures and recommended best practices, but this service was not utilized during the 2008-2009 season by non-IAATO members or privately operated yachts.

1.6 IAATO Member-Operated 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.

1.6.1 Camping on the Peninsula

Two IAATO members conducting traditional seaborne tourism to the Antarctic Peninsula offered short overnight stays in conjunction with the cruise. Camping provides an 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 more than 10 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 taken ashore; human waste is returned to the ship and meals are eaten only on board the ship.

1.6.2 Climbing and Kayaking from Ships in the Peninsula Area

Six IAATO members, including some yacht operators, offered climbing and/or kayaking activities to their passengers during the 2008-2009 season. These activities have taken place for more than 10 years in the Peninsula region.

1.6.3 SCUBA Diving

Five IAATO members, including a yacht operator, offered SCUBA diving activities to their passengers during the 2008-2009 season. SCUBA diving has taken place in the Peninsula region for at least nine years.

1.6.4 Underwater Remotely Operated Vehicle (ROV)

One IAATO member has utilized an ROV for over seven years in the Antarctic Peninsula. The ROV is used for educational purposes, with video footage aired aboard ship for passengers to get a better understanding of undersea life.

1.6.5 Helicopter Operations

Two IAATO members provided helicopter operations in conjunction with their cruises during the 2008-2009 season. Helicopter operations for tourism purposes have taken place since the 1992-1993 season.

1.6.6 Hovercraft Operations

One IAATO member used a hovercraft in the Ross Sea area during the 2008-2009 season.

1.7 Commercial Land-Based Tourism

1.7.1 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 23rd consecutive season. ALE hosted a total of 273 clients, 57 Government and VIP personnel, and managed these guests with 60 guides, 45 staff, and 29 air crew.

ALE employs experienced staff and guides, many of whom have worked previously at Patriot Hills and other locations to be visited (85% of all staff have previous Antarctic experience). Staff and guides assist in the preparation of policies and guidelines, 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 nineteen flights.
- Three ski-equipped Twin Otter aircraft were used for flights in Antarctica and to support medical evacuation throughout the Antarctic season.

Tractor Traverses:

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

Patriot Hills Camp:

- Patriot Hills Camp opened October 31, 2008 and closed January 31, 2009.

Programs Supported by ALE

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

Government Support	57
Antarctic Odyssey	3
South Pole Fly-In	44
Vinson Massif	177
Last Degree	49

South Pole Ski - Hercules	19
South Pole Ski - Messner	11
South Pole Ski - McMurdo	4
Emperor Penguin	2
Marathon	15
Camp Staff, Air Crew and Others	80
Total	461

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

Government Activity Supported by ALE

Requests from National Operators, research institutes and government agencies resulted in ALE providing support for over 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 varying periods. ALE hosted visitors from British Antarctic Survey (BAS), Centro de Estudios Científicos, Chile (CECS), Dirección General de Aeronáutica Civil de Chile (DGAC), FACH (Chilean Airforce), Korean Polar Research Institute (KORDI), Monaco Antarctique 2009, National Science Foundation (USA), and Universidade Federal do Rio Grande do Sul/Programa Antártico Brasileiro (UFRGS).

ALE was honored by a visit from Prince Albert II of Monaco as part of a major expedition to more than 20 research centers in Antarctica to learn about the impact of climate change and to celebrate Monaco's accession to the Antarctic Treaty in 2008. The Prince is the only Head of State to have travelled to both North and South poles in a quest to raise awareness of the importance of environmental protection.

ALE supported a team from the Korean Polar Research Institute, KORDI, who continued their multi-year meteorite study near the Moulton Escarpment.

Logistic support and field equipment was provided for a group of scientists from Universidade Federal do Rio Grande do Sul, part of the Brazilian Antarctic Program, who were flown to Mt. St Johns where they drilled a 75 m ice core that will complete one of the gaps in the International Trans-Antarctic Scientific Expedition (ITASE) snow sampling net over Antarctica. A second group undertook atmospheric and geological studies in the Independence Hills.

ALE also provided flight and overland support for a successful study of glacier flow rates and bedrock studies at the Union Glacier by researchers from the Centro de Estudios Científicos (Center for Scientific Studies, Valdivia, Chile).

1.7.2 Air / Land-Based Activities conducted by IAATO Members in the Antarctic Peninsula¹

For the 2008-2009 season, IAATO Associate Member Destination Management Chile (DMC), operating through Aerovias DAP, conducted five separate day-trips from Punta Arenas to King George Island. A total of 197 passengers were escorted on station visits and Zodiac rides to Ardley Island. These flights are offered as an optional excursion to cruise ship passengers calling at Punta Arenas.

1.8 Air Operations – Over-flights operated by IAATO Members

For the 2008-2009 season, there were no over-flights of Antarctica by IAATO members. This compares with six over-flights carrying a total of 270 passengers to the Antarctic Peninsula area in an Airbus-319 during the previous 2007-2008 season.

¹ As Aerovias DAP, which is not an IAATO member, was the operator of record for these 197 passengers, they are not included in the overall statistics in this Overview addendum.

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

Appendix 3 illustrates a revised breakout of tourism categories that are projected for the 2009-2010 season. The estimate is based on updated information provided to the IAATO Secretariat in July and early August of 2009 by the association's members.

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 revised estimates provided to IAATO by members in July and early August of 2009, 21,401 seaborne and yacht (sailing and motor) passengers are expected to land in Antarctica from commercially organized vessels, 450 from combination air-cruise programs, and 335 on air/land-based expeditions during the 2009-2010 season. Another 15,531 are anticipated on cruise-only programs. No over-flight passengers are expected during the 2009-2010 season (see Appendix 3).

3.0 Antarctic Tourism Trends

A trends chart showing the change in tourism dating from the 1992-1993 season, with estimates for both the 2008-2009 and 2009-2010 seasons, can be found in Appendix 2 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:

- Appendix 1: Overview of Antarctic Tourism 2008-2009;
- Appendix 2: Histogram of 1992-2009 Antarctic Tourist Trends – Landed Passengers, including ship- and land-based passenger numbers (revised);
- Appendix 3: Preliminary Estimate of Antarctic Tourism 2009-2010 (revised)

Appendix 1: Overview of Antarctic Tourism 2008-2009
Based on Information provided by IAATO Members to the IAATO Secretariat as of May 31, 2009

IAATO Members Seaborne Tourism – Peninsula Region – 2008-2009

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Act. # Voyages	Act. # of Passengers	Activities incl. landings
Traditional Vessels							
<i>Akademik Ioffe</i>	Russia	Quark Expeditions	United States	110	10	993	Zodiac, kayak, camping, climbing
<i>Akademik Sergey Vavilov</i>	Russia	Quark Expeditions	United States	100	10	995	Zodiac, kayak, camping, climbing
<i>Akademik Shokalskiy</i>	Russia	Quark Expeditions	United States	48	10	419	Zodiac, kayak, camping, diving
<i>Aleksey Maryshev</i>	Russia	Oceanwide Expeditions	Netherlands	52	9	424	Zodiac, diving
<i>Aleksey Maryshev</i>	Russia	Waterproof Expeditions	Netherlands	52	1	33	Zodiac, diving
<i>Andrea</i>	Liberia	Elegant Cruises	United States	100	7	592	Zodiac
<i>Antarctic Dream</i>	Chile	Antarctic Shipping	Chile	78	13	817	Zodiac
<i>Bark Europa</i>	Netherlands	Rederij Bark Europa B.V	Netherlands	38	5	192	Zodiac
<i>Bremen</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	164	3	396	Zodiac
<i>Clipper Adventurer</i>	Bahamas	Quark Expeditions	United States	122	10	1096	Zodiac
<i>Corinthian II</i>	Malta	Travel Dynamics	United States	114	7	703	Zodiac
<i>Delphin</i>	Bahamas	Hansa Kreuzfahrten	Germany	500	2	721	Zodiac
<i>Discovery</i>	Bermuda	Voyages of Discovery	United States	650	6	2,333	Zodiac
<i>Fram</i>	Norway	Hurtigruten ASA	Norway	317	11	2,445	Polar Circle Boats
<i>Grigoriy Mikheev</i>	Russia	Oceanwide Expeditions	Netherlands	46	5	180	Zodiac, diving
<i>Grigoriy Mikheev</i>	Russia	Waterproof Expeditions	Netherlands	46	3	126	Zodiac, diving

IAATO Members Seaborne Tourism – Peninsula Region – 2008-2009

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Act. # Voyages	Act. # of Passengers	Activities incl. landings
Traditional Vessels							
<i>Hanseatic</i>	Bahamas	Hapag Lloyd Kreuzfahrten	Germany	184	4	601	Zodiac
<i>HSH Prince Albert II</i>	Bahamas	Silverseas Cruises	United States	132	7	832	Zodiac
<i>HSH Prince Albert II</i>	Bahamas	Abercrombie & Kent	United States	132	1	131	Zodiac
<i>Kapitan Khlebnikov</i>	Russia	Quark Expeditions	United States	108	3	243	Zodiac, helicopter
<i>Le Diamant</i>	France	Compagnie Des Iles Du Ponant	France	199	5	714	Zodiac
<i>Le Diamant</i>	France	Zegrahm Expeditions	United States	199	2	291	Zodiac
<i>Lyubov Orlova</i>	Cook Islands	Quark Expeditions	United States	108	10	1,036	Zodiac
<i>Marco Polo</i>	Bahamas	Transocean Tours	Germany	550	4	1,682	Zodiac
<i>Minerva (Cat 1)</i>	Bahamas	Abercrombie & Kent	United States	199	8	1,619	Zodiac
<i>National Geographic Endeavour</i>	Bahamas	Lindblad Expeditions	United States	118	11	980	Zodiac, kayak, ROV
<i>National Geographic Explorer</i>	Bahamas	Lindblad Expeditions	United States	148	6	620	Zodiac, kayak
<i>Ocean Nova</i>	Bahamas	Quark Expeditions	United States	82	9	593	Zodiac
<i>Polar Pioneer</i>	Russia	Aurora Expeditions	Australia	56	10	511	Zodiac, kayak, camping, climbing, diving
<i>Polar Star</i>	Barbados	Polar Star Expeditions	Norway	105	8	739	Zodiac
<i>Polar Star</i>	Barbados	Cheeseman's Ecology Safaris	United States	105	1	93	Zodiac
<i>Professor Molchanov</i>	Russia	Oceanwide Expeditions	Netherlands	52	11	565	Zodiac
<i>Professor Multanovskiy</i>	Russia	Oceanwide Expeditions	Netherlands	52	9	431	Zodiac
<i>Professor Multanovskiy</i>	Russia	One Ocean Expeditions	Canada	52	3	145	Zodiac

IAATO Members Seaborne Tourism – Peninsula Region – 2008-2009

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Act. # Voyages	Act. # of Passengers	Activities incl. landings
Traditional Vessels							
<i>Sarsen</i>	Australia	Moir Holdings	Australia	15	1	8	Zodiac
<i>Spirit of Adventure</i>	Bahamas	Saga Shipping	United Kingdom	352	3	557	Zodiac
<i>Ushuaia</i>	Panama	Antarpply Expeditions	Argentina	84	6	441	Zodiac
<i>Ushuaia</i>	Panama	Fathom Expeditions	Canada	84	1	79	Zodiac
<i>Ushuaia</i>	Panama	Students on Ice	Canada	84	1	76	Zodiac
Total					236	25,452	

IAATO Members Seaborne Tourism – Peninsula Region – 2008-2009

Air/Cruise							
<i>Grigoriy Mikheev</i>	Russia	Antarctica XXI	Chile	57	8	285	Fly to King George Island, Zodiac
Total					8	285	

IAATO Member Yachts (all regions) 2008-2009

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Act. # Voyages	Act. # of Passengers	Activities incl. landings
Yachts							
<i>Australis</i>	Australia	Ocean Expeditions	Australia	9	3	26	Zodiac, kayak, climbing
<i>Golden Fleece</i>	UK Overseas Territory	Golden Fleece Expeditions	UK Overseas Territory	10	2	12	Zodiac
<i>Hanse Explorer</i>	Antigua	Oceanstar	Germany	12	5	44	Zodiac
<i>Itasca</i>	Cayman Islands	High Latitudes	United Kingdom	10	1	7	Zodiac
<i>Kotick</i>	France	Kotick Charters Ltd	France	4	1	5	Zodiac
<i>Pelagic</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	6	1	6	Zodiac, diving, climbing

IAATO Member Yachts (all regions) 2008-2009

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Act. # Voyages	Act. # of Passengers	Activities incl. landings
Yachts							
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	10	4	30	Zodiac, diving, climbing
<i>Philos</i>	Australia	Ocean Expeditions	Australia	5	1	4	Zodiac
<i>Santa Maria Australis</i>	German	Sea and Ice Mountain Expeditions	Chile	9	3	27	Zodiac, kayak, climbing, activities vary
<i>Seal</i>	USA	Sterna Corporation	USA	6	0	0	Zodiac
<i>Spirit of Sydney</i>	Australia	Spirit of Sydney Expeditions	Australia	8	1	7	Zodiac
<i>Xplore</i>	Panama	Xplore Expeditions	Panama	10	1	6	Zodiac
Total					24	174	

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Act. # Voyages	Act. # of Passengers	Activities incl. landings
Cruise Only							
<i>Amsterdam</i>	Netherlands	Holland America Line	United States	1,316	3	3,929	Cruise Only
<i>Crystal Symphony</i>	Bahamas	Crystal Cruises	United States	940	1	772	Cruise Only
<i>Mona Lisa</i>	Bahamas	Peace Boat / Japan Grace	Japan	1,200	1	562	Cruise Only
<i>Prinsendam</i>	Netherlands	Holland America Line	United States	793	1	638	Cruise Only
<i>Star Princess</i>	Bermuda	Princess Cruises	United States	2,600	2	4,751	Cruise Only
Total					8	10,652	

IAATO Members Seaborne Tourism – Continental/Ross Sea - 2008-2009

Vessels	Vessel Registry	Operator / Charterer	Operator Country	Passenger Capacity	Act. # Voyages	Act. # of Passengers	Activities incl. landings
<i>Bremen*</i>	Bahamas	Hapag Lloyd	Germany	164	1	119	Zodiac
<i>Kapitan Khlebnikov*</i>	Russia	Quark Expeditions	United States	108	2	204	Zodiac, helicopter
<i>Marina Svetaeva</i>	Russia	Aurora Expeditions	Australia	100	3	271	Zodiac, helicopter
<i>Orion</i>	Bahamas	Orion Expeditions	Australia	106	3	288	Zodiac
<i>Spirit of Enderby</i>	Russia	Heritage Expeditions	New Zealand	48	5	140	Zodiac, hovercraft
Total					14	1,022	

* Semi - circumnavigation voyage

IAATO Members Air/Land Based Tourism - 2008-2009

Operator	Country	Antarctic Area Visited	Aircraft Used	Est. # of Departures	Est. # Average Load	Act # of Passengers	Activities
<i>Adventure Network International / Antarctic Logistics and Expeditions</i>	United States	Patriot Hills, South Pole	Ilyushin-76, Twin Otter	Varies	Varies	273	Camping, climbing, skiing, marathon
Total						273	

IAATO Members Air/Overflights - 2008-2009

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	0		0	Overflights, no landings
Total				0		0	

**SUMMARY OF VISITORS for 2008-2009 SEASON
(All Tourist Types)**

Types of Tourism	Number of Vessels	Number of Departures	Total Number of Passengers
IAATO Seaborne Tourism Peninsula	31	236	25,452
IAATO Seaborne Tourism Ross Sea/Continental	5	14	1,022
IAATO Sailing Vessels/Yachts	11	24	174
IAATO Air/Cruise Peninsula	1	8	285
IAATO Large Ships Cruise-Only/Peninsula	5	8	10,652
IAATO Air/Land Based Tourism		varies	273
IAATO Member Air/Overflights/Peninsula		0	0

Total Visitors for 2008-2009 Season:	
Seaborne Traditional Tourism (with landings)	26,648
Seaborne Tourism Cruise-Only (no landing)	10,652
Air/Cruise	285
Air/Land-Based 'Traditional' Tourism	273
Overflights (no landing)	0
Total	37,858

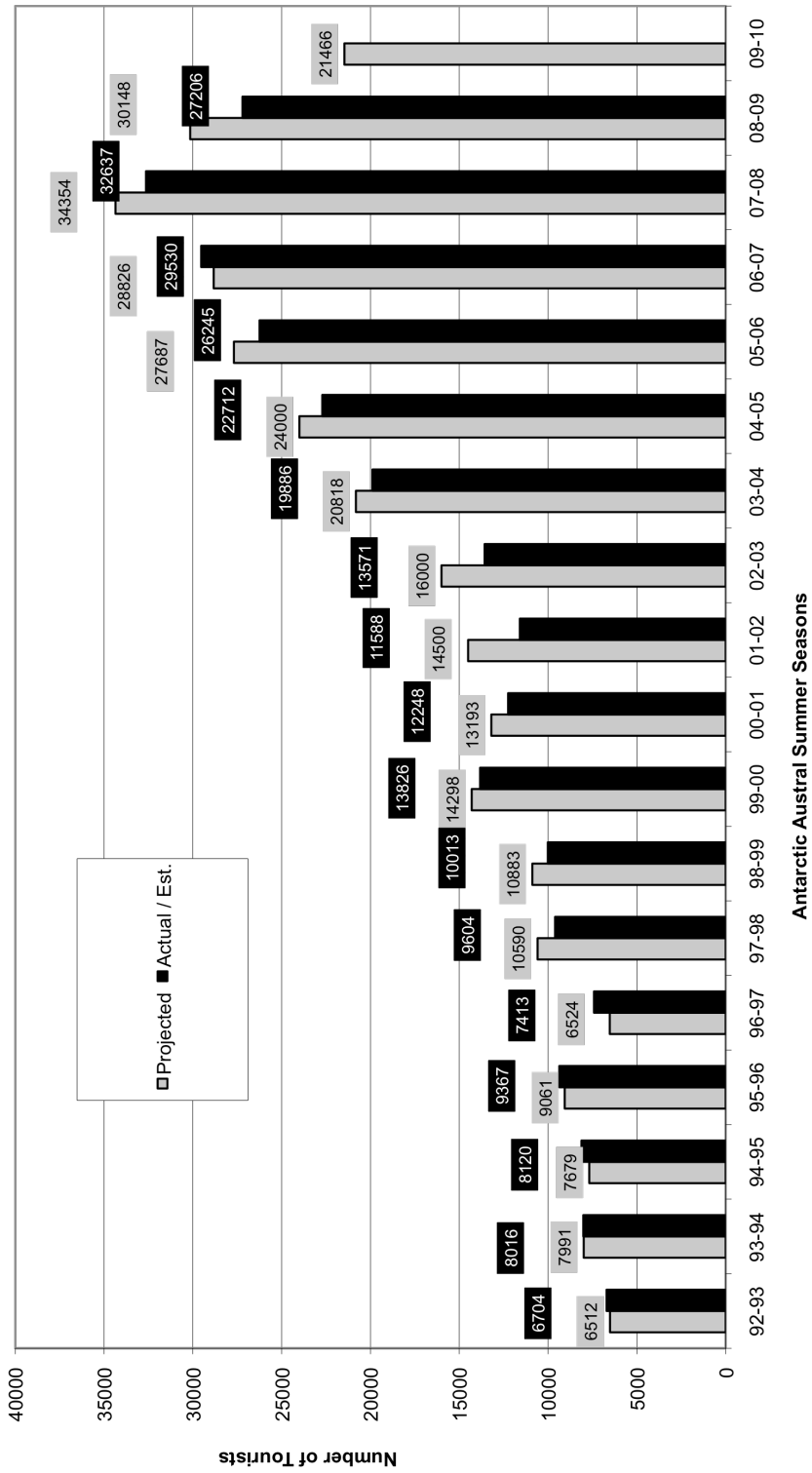
Appendix 2

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

September 2, 2009



Appendix 3: Preliminary Estimate of Antarctic Tourism 2009-2010 (revised)

Based on Information provided by IAATO Members to the IAATO Secretariat as of August 13, 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	One Ocean Expeditions	Canada	110	5	86	430	Zodiac, kayak, camping, climbing
<i>Akademik Sergey Vavilov</i>	Russia	Quark Expeditions	United States	100	10	68	680	Zodiac, kayak, camping, climbing
<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	3	68	204	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>	Cook Islands	Quark Expeditions	United States	108	11	70	770	Zodiac
<i>Minerva (Cat 1)</i>	Bahamas	Abercrombie & Kent	United States	200	5	200	1000	Zodiac
<i>Minerva (Cat 2)</i>	Bahamas	Abercrombie & Kent	United States	300	2	300	600	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>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

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					213		2097	

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>	Falkland Islands	Golden Fleece Expeditions	UK Overseas Territory	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	5	5	Zodiac, diving, climbing
<i>Pelagic Australis</i>	British Virgin Islands	Pelagic Expeditions	United Kingdom	10	2	8	16	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					27		220	

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	1340	1	1100	1100	Cruise Only
<i>Celebrity Infinity</i>	Malta	Celebrity / Royal Caribbean	United States	1950	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>Oceanic</i>	Bahamas	Peace Boat / Japan Grace	Japan	1200	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	2600	2	2,600	5200	Cruise Only
<i>Veendam</i>	Netherlands	Holland America Line	United States	1340	2	1100	2200	Cruise Only
Total					12		15531	

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	0	85	0	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					5		364	

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)</i>	Russia & South Africa	Filchner Ice Shelf, South Pole	Ilyushin-76	unknown	unknown	110	Climbing, skiing, station visits
Total				Varies		335	

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	0		0	Overflights, no landings
Total				0		0	

**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	29	213	20,097
IAATO Seaborne Tourism Ross Sea/Continental	3	5	364
IAATO Sailing Vessels/Yachts	12	27	220
IAATO Air/Cruise Peninsula	1	9	450
IAATO Large Ships Cruise-Only/Peninsula	9	12	15,531
IAATO Air/Land Based Tourism		varies	335
IAATO Member Air/Overflights/Peninsula		0	0

Total Preliminary Visitor Estimates for 2009-2010 Season:	
Seaborne Traditional Tourism (with landings)	20,681
Seaborne Tourism Cruise-Only (no landing)	15,531
Air/Cruise	450
Air/Land-Based 'Traditional' Tourism	335
Overflights (no landing)	0
Total	36,997