

A Summary of IAATO Member Antarctic Tourism Trends

Passenger numbers for 2012-13 and 2013-14 as of May 7, 2013, subject to change.

SEASON	2013-2014 estimate	2012-2013 estimate	2011-2012	2010-2011	2009-2010	2008-2009
Seaborne tourism with landings	23,348	23,305	20,271	18,534	21,277	26,648
Seaborne tourism, no landings	9,920	9,070	4,872	14,373	15,026	10,652
Air & cruise combination, with landings	1,588	1,587	860	531	345	285
Air & land tourism	498	354	516	386	233	273
Over-flights, no landings	0	0	0	0	0	0
TOTAL	35,354	34,316	26,519	33,824	36,881	37,858

Committed to Safety & Environmental Conservation

Addressing safety and environmental concerns remains a priority for the Antarctic tourism industry. At annual meetings, IAATO members review the previous season and any notable issues, and look forward to potential challenges in order to ensure that the Association is prepared for changes or developments that could affect the industry.

During 2012, IAATO was pleased to support a detailed study outlining the risks related to the inadvertent reintroduction of foreign plants and animals into the Antarctic environment. Authored by an international team of scientists led by Prof. Steven Chown, director of the DSF-NRF Centre of Excellence for Invasion Biology at Stellenbosch University in South Africa, and including IAATO Operations Director Dr. Kim Crosbie, the study appeared in the March 2012 issue of Proceedings of the National Academy of Science (PNAS).



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A Driving Force for Conservation

Tourism is and should continue to be a driving force in Antarctic conservation. Firsthand travel experiences foster education and understanding, with visitors from all over the world – representing more than 100 different nationalities during the 2012-13 season alone – returning home from Antarctica as ambassadors of goodwill, guardianship and peace for the destination they have visited.



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ANTARCTICA TOURISM FACT SHEET 2013-2014

INTERNATIONAL ASSOCIATION OF ANTARCTICA TOUR OPERATORS

A Member Organization Founded in 1991 to Advocate, Promote and Practice Safe and Environmentally Responsible Private-Sector Travel to the Antarctic

Creating Ambassadors for Antarctica

Antarctica embodies the most profound manifestation of international peace in the world today. Managed for more than a half-century through the Antarctic Treaty System's unprecedented global partnership of nearly 50 countries, the entire continent is formally designated "a natural reserve, devoted to peace and science," putting all territorial claims into abeyance. The Treaty is supplemented by the Protocol on Environmental Protection that sets standards for all human activities – governmental and tourism alike – and which aims to ensure that those activities are planned and conducted in a way that limits adverse impacts on the Antarctic environment.

Tourism is a legitimate activity under the Antarctic Treaty, and each year visitors from all over the world come to witness and experience Antarctica's tranquil natural splendor of ancient glaciers and unique wildlife. Nearly all of these visitors arrive by ship, with the remainder arriving by air. From a peak of 46,265 visitors during the 2007-08 austral summer season, this number has retreated in recent years due to the world economic crisis and the ban on heavy fuel oil. But regardless of the number of visitors, one fact remains clear: these fortunate travelers return home as ambassadors for the continent and its continued protection for future generations.

www.iaato.org

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Recent Activities, Resources & Accomplishments

MEMBERSHIP

116 members belonged to IAATO as of April 15, 2013. Of this number, 55 members are tour operator/organizers who secure authorization from their respective Treaty Party to conduct tourism activities; 38 are associate members who market other members' programs; and 23 are affiliate members who support Antarctic tourism and IAATO's objectives. IAATO now represents all SOLAS passenger vessels operating in Antarctic waters.

ORGANIZATIONAL CHANGES, NEW EXECUTIVE DIRECTOR

In February 2013, IAATO announced a restructuring of its Secretariat, reestablishing the post of Executive Director, with Dr. Kim Crosbie named to the position. Dr. Crosbie's many years of experience in Antarctic tourism, along with her expertise in the region's political, environmental and maritime issues, make her the ideal candidate to lead IAATO. Dr. Crosbie oversees the IAATO Secretariat, which includes Environmental Manager Claudia Holgate, Office Manager Laura Goldstein, and Administrative Officer Janeen Haase, who assumes most of the duties of the previous Administrative Director, Steve Wellmeier.

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Recent Activities, Resources & Accomplishments *continued*

• ANTARCTIC SITE GUIDELINES REVIEW

IAATO joined a team of Treaty Party representatives aboard the *HMS Protector* in mid-January 2013 for a review of guidelines for a number of Antarctic Peninsula landing sites. The team consisted of representatives of the United Kingdom, Australia, Argentina, the USA and IAATO. They concurred that current guidelines were generally effective, albeit with some revisions that will be presented at ATCM XXXVI in June 2013. The team has also submitted a paper covering broader policy issues on site guidelines.

• COMPLIANCE & DISPUTE RESOLUTION POLICY

During 2013, Members adopted rules of procedure for IAATO's new compliance and dispute resolution policy. The rules of procedure establish an impartial process for determining whether a member has violated IAATO Bylaws, directives or standard operating procedures. A new Compliance and Dispute Resolution Committee was also established.

• IAATO FIELD STAFF TRAINING, CERTIFICATION & NEWSLETTER

The online training and assessment program for IAATO field staff is fully operational. A total of 223 staff have passed at least one of the assessments, with more than 177 this past season alone. Several IAATO operators have made the successful completion of an assessment mandatory in their hiring process. A new IAATO Field Staff Newsletter, with seasonal news and updates from around the Continent, was also initiated.

• IAATO ENHANCED OBSERVER SCHEME

Notable progress was made, with several members again volunteering to participate during the current pilot phase. The scheme is designed to move IAATO toward more comprehensive accreditation standards and provide useful insight into the competent authority permitting process.

• IMPROVED DATABASE & WEBSITE CAPABILITIES

During the past year, IAATO embarked on a major overhaul of its internal database, with the goal of streamlining data entry, eliminating redundancy and providing quicker turn-around on reports and tourism statistics. Improvements are also slated for the IAATO website, specifically to the Membership and Vessel Directories. This phase of improvements will continue through 2013 and into 2014, benefiting members and consumers alike.

• YACHT OUTREACH CAMPAIGN

IAATO continued its public awareness campaign during the 2012-13 season, aimed at commercial and private yacht operators intending to visit Antarctica. The campaign includes multi-language posters and pamphlets distributed at yacht marinas and port authorities in Chile and Argentina and an informative website: www.iaato.org/yachts/

• IAATO FIELD OPERATIONS MANUAL (FOM)

The fifth annual edition of the FOM was issued for the 2012-13 Antarctic season, providing a standardized and comprehensive set of regulations and guidelines relevant for IAATO tour operators, vessel captains and expedition staff.

• CLIMATE CHANGE

Educating members, their field staffs and passengers about the effects of climate change on the Antarctic environment continue to be a focus of IAATO's outreach efforts. This includes the development of a new PowerPoint presentation that can be used during Antarctic voyages and other venues to disseminate the findings of recent scientific studies on the issue; analysis of an IAATO operator survey for measures to potentially reduce a passenger vessel's carbon footprint; and ongoing use of a multilingual pamphlet, *Climate Change in Antarctica – Understanding the Facts*, based on the report by the Scientific Community on Antarctic Research (SCAR).

• VESSEL TRACKING

For the past three Antarctic seasons, all commercial SOLAS passenger ships in the IAATO fleet have actively participated in a web-based satellite vessel tracking system. Designed to enhance contingency response, the website has proven extremely useful among IAATO Members as well as Maritime Rescue Coordination Centers (MRCCs) and appropriate international governmental agencies.

• ATTENDANCE AT ANTARCTIC TREATY CONSULTATIVE MEETING (ATCM)

As an invited Expert since 1992, IAATO participates in annual ATCMs, providing expert advice on tourism-related issues, submitting substantive Information Papers and contributing to discussions. IAATO Information Papers from ATCM XXXV can be found at: <http://iaato.org/the-antarctic-treaty>. IAATO also actively participates in ATCM Intersessional Contact Group (ICG) discussions on a variety of topics.

• OTHER ANTARCTIC-RELATED MEETINGS

In its efforts to be collaborative with other Antarctic stakeholders, IAATO has participated in the following meetings during the past year:

- ▶ *Polar Shipping Risk Assessment Workshop*, Ottawa, Canada, June, 2012
- ▶ *Council of Managers of National Antarctic Programs (COMNAP) 24th Annual Meeting*, Portland, Oregon, USA, July 2012
- ▶ *International Hydrographic Organization/Hydrographic Committee on Antarctica (IHO/HCA)*, Montevideo, Uruguay, October 2012
- ▶ *International Maritime Organization (IMO) Marine Safety Committee Meeting (MSC91)*, London, UK, November 2012
- ▶ *IMO Design & Equipment Subcommittee Meeting (DE57)*, London, UK, March 2013
- ▶ *UK Antarctic Stakeholders Meeting*, London, UK, March 2013
- ▶ *Germany Antarctic Stakeholders Meeting*, Bremen, Germany, April 2013

• CHARITABLE CAUSES & PRO BONO TRANSPORT

Over the past nine years, IAATO members and passengers have contributed more than \$2.7 million (US dollars) in cash or in-kind donations to Antarctic-related charitable causes, conservation and preservation organizations. These include Save the Albatross, Oceanites, Antarctic Heritage Trust and others. In addition, IAATO member-operators transported nearly 100 scientists, station and national program personnel gratis or at minimal expense during 2012-13 to/from Antarctica.

Percentage of Known Passenger Nationalities for 2012-13 Season

NATIONALITY	Percentage of Total
United States	31.1
Germany	11.1
Australia	10.8
United Kingdom	10.2
China	6.8
Canada	5.8
Switzerland	3.0
France	2.9
Other	18.3
TOTAL (as of May 7, 2012)	100%

No More than a Minor or Transitory Impact

Antarctica – particularly in relation to its size – receives relatively few visitors compared with other wilderness destinations. But there is always the underlying concern that visitation may result in a cumulative impact to the environment. In more than 45 years of organized tourism to the continent, however, no discernible impact has been observed. This is due in no small degree to the efforts of the International Association of Antarctica Tour Operators (IAATO), which has devoted itself for the past 22 years to ensure that tourism activities do not disturb or despoil the Antarctic environment. All members are committed to the principle that their planned activities will have no more than a minor or transitory impact on the Antarctic environment.

IAATO is a global network of tour operators that banded together in 1991 to advocate, promote and practice safe and environmentally responsible private-sector travel to the Antarctic. Together, these operators have agreed to operational procedures, membership requirements and guidelines that fulfill this important mission, and the success they have achieved is unprecedented in the global tourism industry.



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Effective Management: A Collaborative Effort

The same year that IAATO was established, the Antarctic Treaty Parties agreed to the Environmental Protocol (Madrid, 1991). A key element of this was to require all those planning activities in the Antarctic – including tour operators – to submit environmental impact assessments of the potential impacts of planned activities; prevention of waste disposal and discharge; deference to scientific research and protected areas; adequate response plans to potential environmental emergencies; and other protection, self-sufficiency and safety requirements. While mechanisms to enact the Protocol have still to come into force in some Treaty Parties, IAATO has endeavored to fill in any potential loopholes for operators by requiring its Members to abide by the provisions of the Protocol and provide the organization with Environmental Impact Assessments if their National Authority does not request them.

Collaborative effort has continued in the ensuing years between governments, the industry and environmental organizations to ensure good regulation and management of Antarctic tourism. For example, IAATO has actively assisted Treaty Parties to develop sound and practical ATCM site guidelines and Antarctic Specially Managed Areas (ASMA) with the most-visited sites now covered through Site Guidelines or National Antarctic Program Management.

At the 2009 ATCM gathering, the Antarctic Treaty Parties codified Measure 15, which was based on prescripts developed by IAATO and followed by its members for the past decade. This Measure is a legally binding requirement that tour operators refrain from making any landings in Antarctica from vessels carrying more than 500 passengers. The same measure requires that tour operators coordinate with each other so that not more than one vessel is at a landing site at any one time; that no more than 100 passengers are ashore at a landing site at any one time; and that a 1:20 guide-to-passenger ratio be maintained while ashore.