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# **A Five-Year Overview and 2022-23 Season Report on IAATO Operator Use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines**



# A Five-Year Overview and 2022-23 Season Report on IAATO Operator Use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines

*Information Paper submitted by IAATO*

## *Introduction*

IAATO remains committed to reporting to the CEP and ATCM information on IAATO Operator Landing Site and ATCM Visitor Site Guidelines use. This information paper presents data collected by IAATO from IAATO Operator Post Visit Report Forms for the Antarctic Peninsula during the 2022-23 season. Visits by non-IAATO members are not included in this analysis.

In addition to our annual data sets, building on discussions with different Antarctic Treaty Parties around growth, we have included some historical data which may aid in future discussions around site usage and management.

Due to the SARS CoV-2 (COVID-19) pandemic, data sets from the 2020-21 season have been excluded to provide a more representative overview of the statistics.

Additional information on IAATO operator activities can be found in ATCM XLV IP56 *IAATO Vessel Overview of Antarctic Tourism: 2022-23 Season and Preliminary Estimates for 2023-24 Season*, and on the IAATO website <https://iaato.org/information-resources/data-statistics/>.

## *Historic Overview of Antarctic Peninsula Traditional Seaborne Tourism*

Antarctic tourism continues to be primarily focused on traditional commercial seaborne (SOLAS Vessel) tourism in the Antarctic Peninsula, which accounts for over 95% of all landed activity.

A SOLAS vessel is any ship to which the International Convention for the Safety of Life at Sea 1974 applies; namely: a passenger ship engaged on an international voyage, or a non-passenger ship of 500 tons gross tonnage or more engaged on an international voyage.

Yacht (vessels carrying 12 passengers or less) numbers are only included where specifically mentioned.

Figure 1 provides a comparison of the factor increase in different aspects of traditional commercial seaborne tourism (number of passengers, ships, voyages, landings made and sites used).

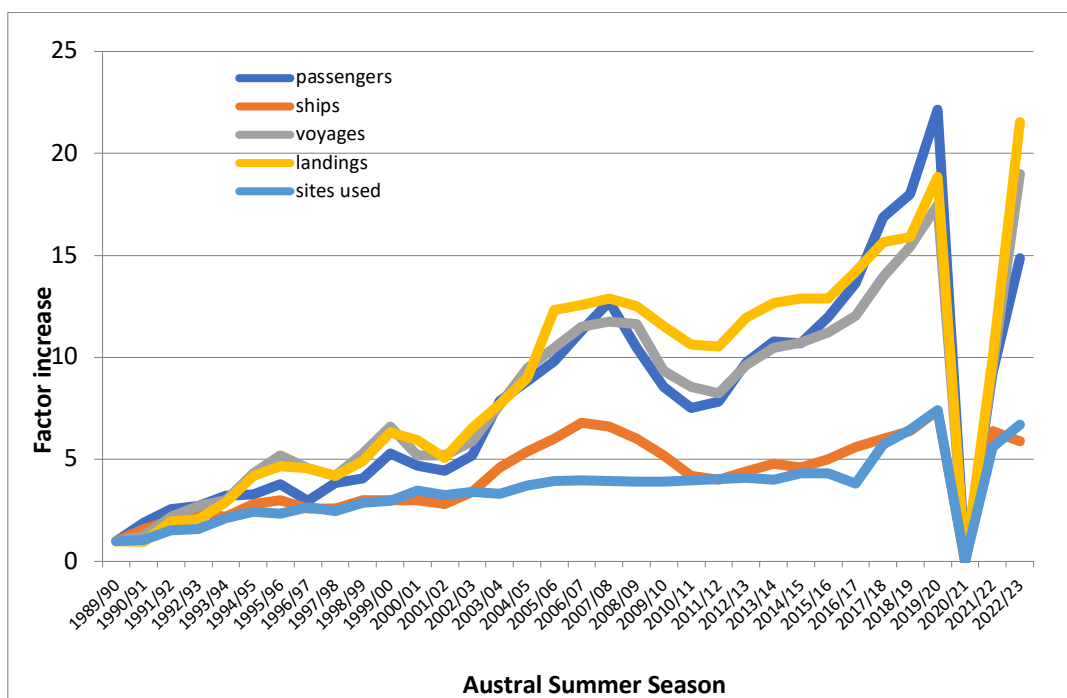


Figure 1: Factor Change in Traditional Landing Ship-borne Tourism in the Antarctic Peninsula 1989–2022.

During the 2022-23, season all traditional commercial seaborne tourism with landings around the Peninsula was conducted by IAATO Operators. Table 1 provides a detailed summary of number of passengers, voyages, landings, sites and vessels over the past five seasons. It shows the industry growth over the period 2017-2022, and potential number of passengers and voyages for 2023-24.

**Table 1:** Comparison between number of landed passengers, voyages, landings, sites and SOLAS vessels on the Antarctic Peninsula for the past five years, 2017–2022, and potential number of passengers, vessels and voyages for 2023/24. Passenger data presented in Table 1 includes IAATO operated Yachts.

Season	2017/18	2018/19	2019/20	2021/22	2022/23	2023/24
<b>Passengers</b>	41517	44303	54485	22979	69854	77731
<b>Voyages</b>	293	324	367	235	494	530
<b>Landings</b>	2679	2717	3223	1703	3576	*
<b>Sites</b>	166	187	215	163	208	*
<b>SOLAS Vessels</b>	30	32	37	32	47	50

- Since IMO’s International Code for Ships Operating in Polar Waters (Polar Code) was adopted, there has been substantial investment by operators in existing and new build vessels. The 2019-20 season saw the first new SOLAS vessels launched after the Polar Code came into force in January 2017
- Some new vessels scheduled for the 2021-22 season were delayed due to the COVID-19 pandemic, and some Operators did not operate all their vessels. The 2022/23 season saw the launch of these delayed vessels.
- Operators saw fewer clients willing to travel during the 2021-22 season due to COVID-19 and therefore had lower occupancy, as well as truncating their season with the emergence of the Omicron variant.

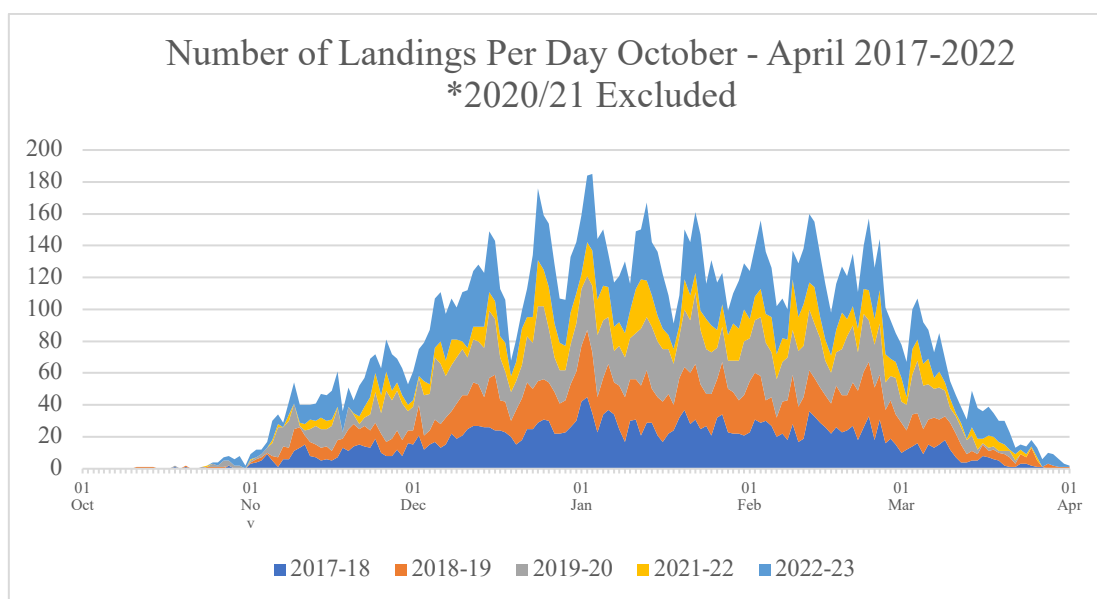
- As new vessels are introduced into the IAATO fleet, the average passenger capacity per vessel has increased. For example, relatively more Category 1 vessels being added now operate at their upper limit capacity 200 passengers.
- Analysis of site use and activities (found in ATCM XLIV IP56 *IAATO Vessel Overview of Antarctic Tourism: 2022-23 Season and Preliminary Estimates for 2023-24 Season*) has shown Operators are responding to IAATO's multi layered strategy to encourage them to spread activities across a range of platforms: ship cruising; small boat cruising; kayaking; etc., in order to reduce activity at landing sites. IAATO has encouraged this practice since 2012 and strengthened it during our 2019 Annual Meeting by incorporating into our Bylaws a new Code of Conduct for Vessels.

### ***Specific Landing Site Use for the 2022/23 season***

The top five visitor sites for the 2022-23 season were Cuverville Island, Neko Harbour, Damoy Point/Dorian Bay, Whalers Bay and Portal Point. These sites account for approximately 25% of all landings made during the season. The top twenty most-visited sites accounted for approximately 65% of all landings.

Appendix I lists the 20 most-visited sites in terms of landings made from 2017–2022

Figure 2 illustrates the cumulative number of landings made per day at all sites within the Antarctic Peninsula over a five-year period (2017–2022). During the 2022-23 season, landings occurred in the Antarctic Treaty area over a period of approximately 160 days from 24 October to 01 April.



**Figure 2:** Cumulative number of landings made per day at all sites within the Antarctic Peninsula 2017–2022.

There is variation in levels of activity. These peaks and troughs are remarkably similar from season to season, and demonstrate the fluctuations in levels of visitation, resulting from schedules for expeditions revolving around holiday season timetables.

Factors such as ice patterns and weather strongly contribute to site selection and visitation patterns by either allowing or restricting access. Additionally, during the 2022-23 season, site selection was also focused on the enhanced biosecurity procedures for Highly Pathogenic Avian Influenza (HPAI), and sites such as Portal Point and Damoy Point/Dorian Bay received higher visitation due to open space away from wildlife.

Additional tourism statistics are available on the IAATO website: <https://iaato.org/information-resources/data-statistics/>.

### ***Use of ATCM Visitor Site Guidelines***

Appendix II provides a five-year analysis (2017-2022) of active seasons (2020-21 excluded) of the total number of known landings made at sites covered by ATCM Visitor Site Guidelines. An assessment of the use of the sites covered by the ATCM Visitor Site Guidelines was conducted through an analysis of the ATCM Post Visit Report Forms for traditional commercial ship-borne and yacht tourism in the Antarctic Peninsula.

### ***Use of IAATO Visitor Site Guidelines***

In addition to ATCM Visitor Site Guidelines, IAATO Operators are bound to follow IAATO Visitor Site Guidelines, which have been put into effect to further assist in site management where ATCM Site Guidelines are not in place yet. The sites can be either terrestrial or marine based, and the criteria by which they are created includes: sites which are visited often, have particular values to be protected, and/or need particular guidance for safety or environmental reasons. IAATO continues to update and enhance guidelines and operational procedures as appropriate.

Appendix III provides a list of visitor sites covered by IAATO Visitor Site Guidelines. IAATO welcomes collaboration with Parties on the development of new site guidelines, and reviewing any of the existing IAATO site specific guidelines.

### ***Conclusion***

The information extracted from these ATCM Post Visit Report forms for traditional commercial ship-borne tourism in the Antarctic Peninsula shows that while overall tourism levels continued to rise prior to the COVID-19 pandemic, the increase is not uniform across all visitor sites as demonstrated in Appendix II. A few sites continue to prove very popular with a greater increase in activity, while some other sites saw a decrease in activity. The pattern of concentrated increase is believed to be partially explained by the popularity of these sites for their reliable access, ease of visitor management, and aesthetic value and historic interest. Additionally, factors such as ice patterns and weather strongly contribute to site selection and visitation patterns by either allowing or restricting access.

All of the top twenty landing sites on the Peninsula are managed by ATCM Visitor Site Guidelines or through National Antarctic Program Management guidelines.

IAATO will continue to provide information annually to the CEP and ATCM on its Operators' activities. In addition, IAATO Operators remain interested in gaining a better understanding of the use of ATCM Visitor Site Guidelines by non-IAATO visitors.

### ***Appendices***

**Appendix I:** Top Twenty Most-Visited Landed Site Visits between 2017–22 Seasons (including yacht visits)

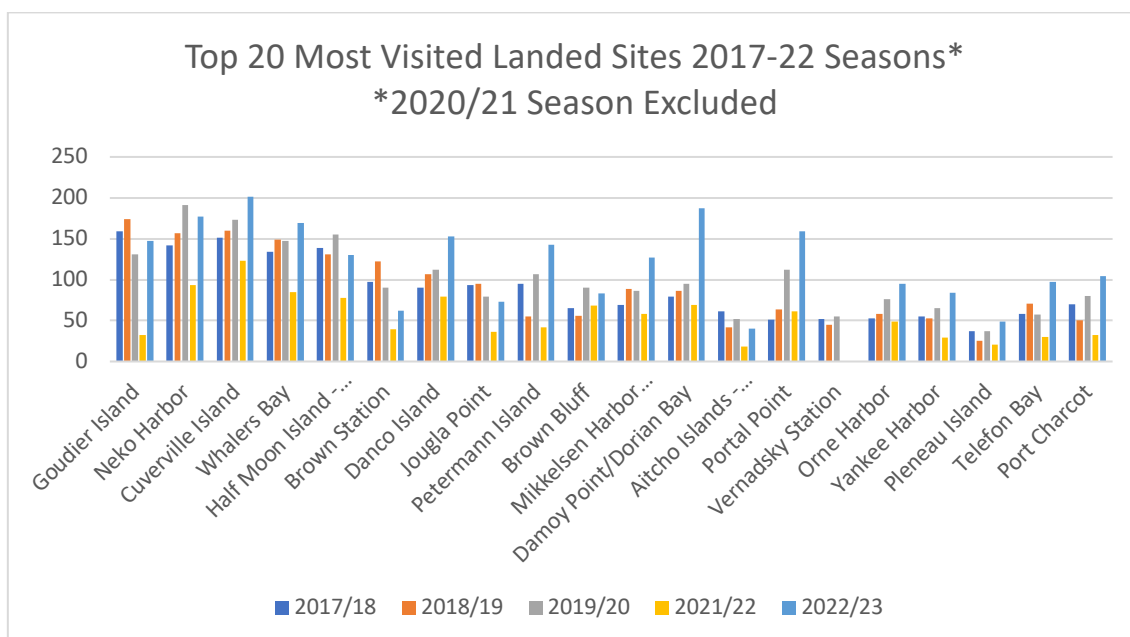
**Appendix II:** Landed Site visits per season covered by the ATCM Visitor Site Guidelines from 2017–22 season (including yacht visits)

**Appendix III:** Number of landed and non-landed visits to sites covered by IAATO Site Specific Guidelines for the 2022-23 season, including yachts

**Appendix I:** Top Twenty Most-Visited Landed Site Visits between the 2017-18 and 2022-23 seasons (including yacht visits) \*2020-21 season excluded

	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2021/22</b>	<b>2022/23</b>
<b>Goudier Island</b>	159	174	131	32	147
<b>Neko Harbor</b>	142	157	191	93	177
<b>Cuerverville Island</b>	151	160	173	123	201
<b>Whalers Bay</b>	134	149	147	85	169
<b>Half Moon Island - Chinstrap Colony</b>	139	131	155	78	130
<b>Brown Station</b>	97	122	90	39	62
<b>Danco Island</b>	90	107	112	79	153
<b>Jougla Point</b>	93	95	79	36	73
<b>Petermann Island</b>	95	55	107	42	143
<b>Brown Bluff</b>	65	56	90	68	83
<b>Mikkelsen Harbor (D'Hainaut)</b>	69	89	86	58	127
<b>Damoy Point/Dorian Bay</b>	79	86	95	69	187
<b>Aitcho Islands - Barrientos Island</b>	61	42	52	18	40
<b>Portal Point</b>	51	64	112	61	159
<b>Vernadsky Station</b>	52	45	55	0	0
<b>Orne Harbor</b>	53	58	76	49	95
<b>Yankee Harbor</b>	55	53	65	29	84
<b>Pleneau Island</b>	37	25	37	21	49
<b>Telefon Bay</b>	58	71	57	30	97
<b>Port Charcot</b>	70	50	80	32	104

**Graphical Depiction of Appendix I:** Top 20 Most-Visited Landed Sites 2017-22 Seasons (including yacht visits)



**Appendix II:** Landed site visits per season covered by the ATCM Visitor Site Guidelines from 2017-22 season (including yacht visits), 2020-21 season excluded.

	2017/18	2018/19	2019/20	2021/22	2022/23
Ardley Island	6	4	11	11	8
Astrolabe Island	**	4	9	1	3
Baily Head	14	14	18	11	6
Barrientos (Aitcho) Island	61	42	52	18	40
Brown Bluff	65	56	90	68	83
Cape Denison	1	0	0	0	0
Cape Evans	2	3	5	1	10
Cape Hallett	0	0	1	0	2
Cape Royds	2	2	4	2	7
Cuverville Island	151	160	173	123	201
Damoy Point / Dorian Bay	75	84	95	69	187
Danco Island	90	107	112	79	153
Detaille Island	19	6	20	1	25
Devil Island	4	11	15	17	34
D'Hainaut (Mikkelsen Harbour)	69	89	86	58	127
George's Point (Ronge Island)	**	18	28	7	29
Goudier (Port Lockroy) Island	159	172	131	32	147
Halfmoon Island – Chinstrap Colony	139	131	155	78	130
Hannah Point & Walker Bay	16	18	8	8	16



Horseshoe Island	4	7	14	9	30
Jougla Point	92	95	79	36	73
Neko Harbour	142	157	191	93	177
Orne Harbour	53	58	76	49	95
Orne Islands	8	8	22	14	15
Paulet Island	28	29	49	35	53
Pendulum Cove	14	17	26	9	16
Penguin Island	20	11	16	14	13
Petermann Island	94	55	107	42	143
Pleneau Island	36	25	37	21	49
Point Wild	3	3	2	2	1
Portal Point	71	63	112	61	159
Port Charcot	1	48	80	32	104
Shingle Cove	1	2	2	9	11
Snow Hill Island, Nordenskjold's hut	8	6	2	7	19
Stonington Island	0	7	9	13	37
Taylor Valley / Canada Glacier	58	0	2	0	2
Telefon Bay	1	71	57	30	97
Torgersen Island*	14	13	8	0	0
Turret Point	7	12	7	5	3
Whalers Bay	134	149	147	85	169
Wordie House	26	21	25	2	24
Yalour Islands	17	7	22	5	45
Yankee Harbour	55	53	65	29	84

\* No Longer a Visitor Site

**Appendix III:** Number of landed and non-landed visits to sites covered by IAATO Site Specific Guidelines for the 2022-23 season, including yachts

	<b>2022/23</b>	<b>Vessel Category</b>
<b>Cape Lookout</b>	6	1
<b>Elephant Point</b>	34	1 and 2
<b>Enterprise Island/Foyn Harbour</b>	110	1 Landed 1 and 2 Marine
<b>False Island Point</b>	7	1 and 2
<b>Fish Islands</b>	43	1 Landed 1 and 2 Marine
<b>Gourdin Island</b>	8	1
<b>Hydruga Rocks</b>	64	1 Landed 1 and 2 Marine
<b>Kinnes Cove/Madder Cliffs</b>	15	1
<b>Melchior Island</b>	82	1 and 2
<b>Penguin Point</b>	0	1 and 2
<b>President Head</b>	17	1 and 2
<b>Prospect Point</b>	26	1
<b>Red Rock Ridge</b>	25	1 and 2
<b>Robert Point</b>	7	1 and 2
<b>Snow Hill Emperor Penguin Guidelines</b>	8	1 and 2
<b>Useful Island</b>	56	1
<b>View Point</b>	3	1 and 2