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## **A Five-Year Overview and 2023-24 Season Report on IAATO Operator Use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines**



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***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 2023-24 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 46 IP102 *IAATO Vessel Overview of Antarctic Tourism: 2023-24 Season and Preliminary Estimates for 2024-25 Season*.

## ***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 since 1989 in different aspects of traditional commercial seaborne tourism (number of passengers, ships, voyages, landings made and sites used).

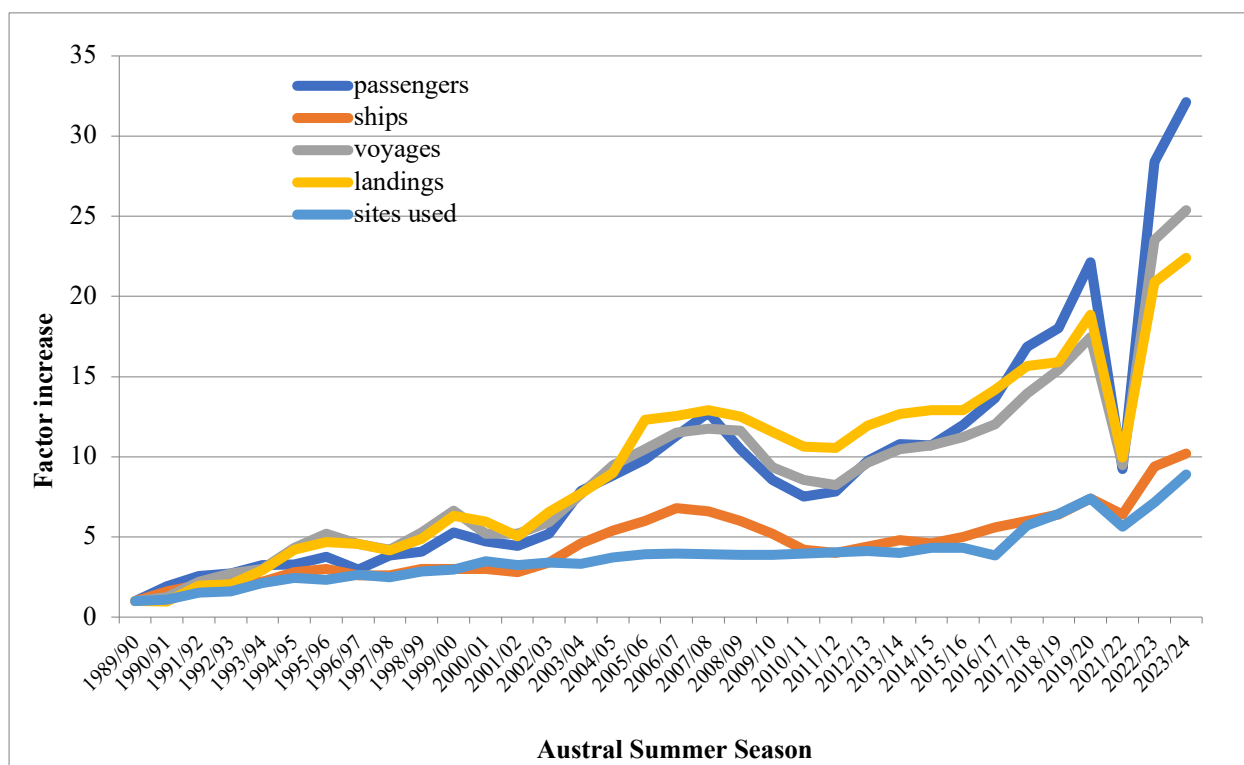


Figure 1: Factor Change in Traditional Landing Ship-borne Tourism in the Antarctic Peninsula 1989-2023 (without 2020-21).

During the 2023-24 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 2018-2023, and potential number of passengers and voyages for around the Peninsula for 2024-25.

Table 1: Comparison between number of landed passengers, voyages, landings, sites and SOLAS vessels on the Antarctic Peninsula for the past five years, 2018–2023, and potential number of passengers, vessels and voyages for 2024-25. Passenger data presented in Table 1 includes IAATO operated Yachts.

Season	2018-19	2019-20	2021-22	2022-23	2023-24	2024-25
Passengers	44303	54485	22979	69854	77597	77760
Voyages	324	367	235	494	536	540
Landings	2717	3223	1703	3576	3832	-
Sites	187	215	163	208	258	-
SOLAS Vessels	32	37	32	47	51	45

- 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.

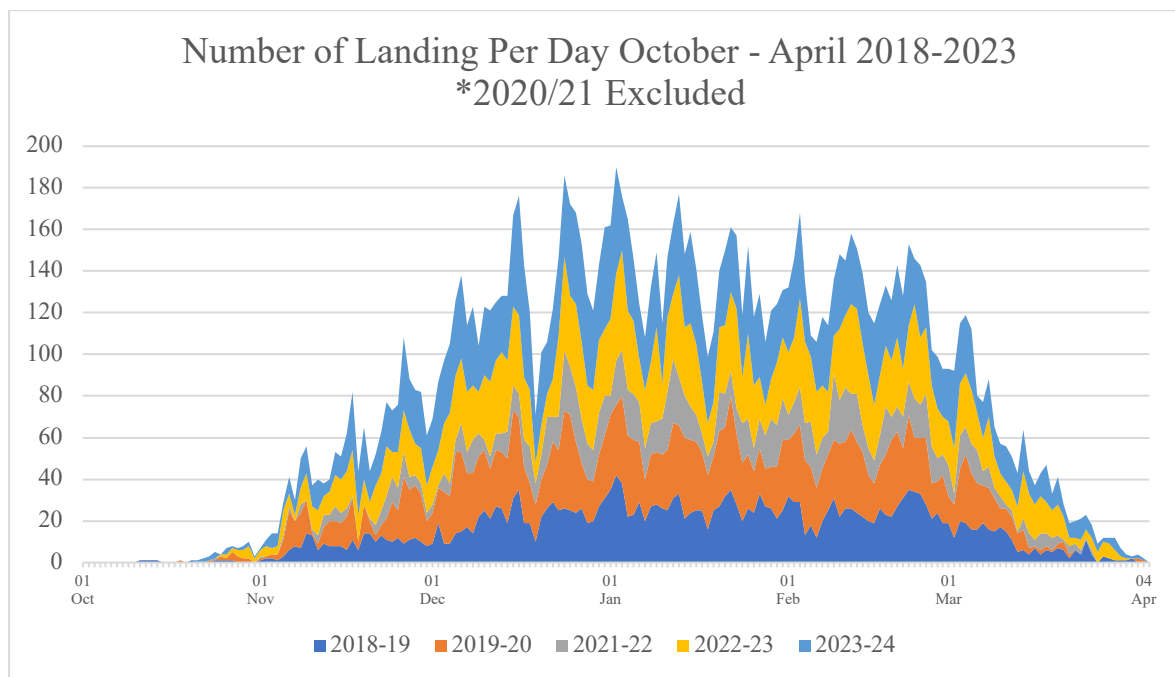
- Some new vessels scheduled for the 2021-22 season were delayed due to the COVID-19 pandemic, and some Operators did not operate all their vessels. The 2022-23 season saw the launch of these delayed vessels.
- Operators saw fewer clients willing to travel during the 2021-22 season due to COVID-19 and 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 of 200 passengers.
- Analysis of site use and activities (found in ATCM 46 IP102 *IAATO Vessel Overview of Antarctic Tourism: 2023-24 Season and Preliminary Estimates for 2024-25 Season*) has shown Operators are responding to IAATO's multi layered strategy to encourage them to spread activities across a range of platforms and sites: ship cruising; small boat cruising; kayaking; etc., in order to reduce activity at the landing sites. IAATO has encouraged this practice since 2012 and strengthened it during our 2019 Annual Meeting by incorporating into our Bylaws a the IAATO Code of Conduct for Vessels.
- The number of sites used for landings during the 2023-24 season has increased. This can be mainly attributed to:
  - Operators utilizing sites with less wildlife as Highly Pathogenicity Avian Influenza (HPAI) precautions are enacted in the field.
  - More accurate reporting of site information by Operators and refinement of data when PVRs are submitted. Each PVR is checked manually to ensure data is recoded appropriately, and site specific where appropriate. For instance, previously where a general region such as Paradise Harbour may have been indicated in the PVR, now a specific site, such as Stony Point, is indicated.

### ***Specific Landing Site Use for the 2023-24 season***

The top five landed visitor sites for the 2023-24 season were Neko Harbour, Cuverville Island, Whaler's Bay, Damoy Point/Dorian Bay, and Portal Point. These sites account for approximately 23% of all landings made during the season. The top twenty most-visited sites accounted for approximately 60% of all landings.

*Appendix I* lists the 20 most-visited sites in terms of landings made from 2018-2023 (2020-21 excluded).

*Figure 2* illustrates the cumulative number of landings made per day at all sites within the Antarctic Peninsula over a five-year period (2018-2023). During the 2023-24 season, landings occurred in the Antarctic Treaty area over a period of approximately 166 days from 21 October to 04 April.



**Figure 2:** Cumulative number of landings made per day at all sites within the Antarctic Peninsula 2018-2023.

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 2023-24 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 the sites allowing open space away from wildlife.

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

Appendix II provides a five-year analysis (2018-2023) 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 and seasonal numbers for 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.

For further information about IAATO site management see ATCM 46 (2024) IP 108 *IAATO Site Management Methods*.

### **Tourism Statistics**

IAATO has been collating data from its members regarding visits to Antarctica for three decades. During that time, changes have been made in the data collected which encompass more detailed activity categories as well as updates to site names. Until recent years, the collating was done manually. Increased capabilities in technology have allowed large data sets to be analyzed more effectively and quicker than previously possible. This has brought to IAATO's attention certain anomalies in the data (i.e. terrestrial landings at marine only sites). Therefore, IAATO strongly recommends users to utilize the most recent information available from IAATO when performing analysis.

To request IAATO data please visit: <https://iaato.org/information-resources/data-statistics/>

### **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 landed sites on the Peninsula are managed by ATCM or IAATO 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 and site visits by non-IAATO visitors.

### **Appendices**

**Appendix I:** Top Twenty Landed Site Visits between 2018-23 Seasons  
(including yacht visits)

**Appendix II:** Landed Site visits per season covered by the ATCM Visitor Site Guidelines from 2018-23 season (including yacht visits)

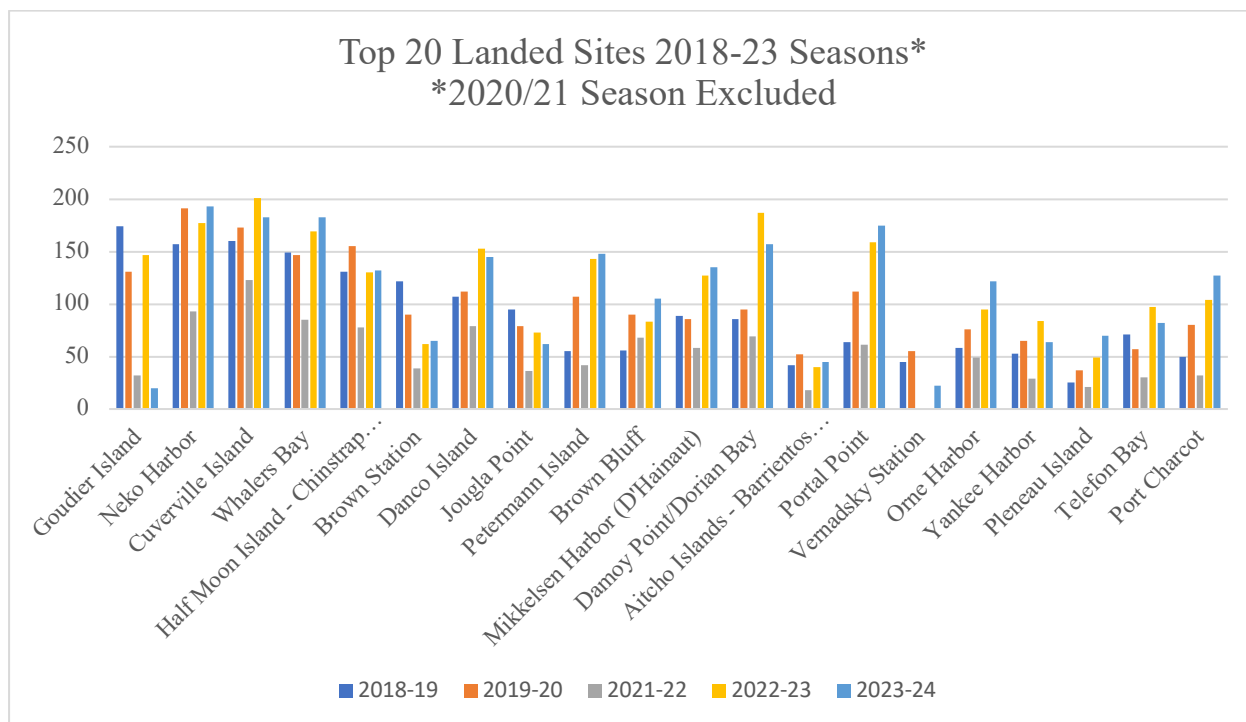
**Appendix III:** Number of landed and non-landed visits to sites covered by IAATO Site Specific Guidelines for the 2023-24 season, including yachts

**Appendix I:** Top Twenty Landed Site Visits between the 2018-23 (including yacht visits) \*2020-21 season excluded

	<b>2018/19</b>	<b>2019/20</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24</b>
<b>Goudier Island</b>	174	131	33	148	20
<b>Neko Harbor</b>	157	191	94	179	193
<b>Cuverville Island</b>	160	173	126	202	183
<b>Whalers Bay</b>	149	147	85	169	183
<b>Half Moon Island - Chinstrap Colony</b>	131	155	78	130	132
<b>Brown Station</b>	122	90	40	61	65
<b>Danco Island</b>	107	112	80	153	145
<b>Jougla Point</b>	95	79	38	76	62
<b>Petermann Island</b>	55	107	45	143	148
<b>Brown Bluff</b>	56	90	68	83	105
<b>Mikkelsen Harbor (D'Hainaut)</b>	89	86	59	128	135
<b>Damoy Point/Dorian Bay</b>	86	95	71	188	157
<b>Aitcho Islands - Barrientos Island</b>	42	52	18	40	45
<b>Portal Point</b>	64	112	61	160	175
<b>Vernadsky Station</b>	45	55	3	5	22
<b>Orne Harbor</b>	58	76	49	95	122
<b>Yankee Harbor</b>	53	65	29	84	64
<b>Pleneau Island</b>	25	37	21	52	70
<b>Telefon Bay</b>	71	57	29	97	82
<b>Port Charcot</b>	50	80	33	106	127



Graphical Depiction of Appendix I: Top 20 Landed Sites 2018-23 Seasons (including yacht visits)



**Appendix II:** Landed site visits per season covered by the ATCM Visitor Site Guidelines from 2018-23 season (including yacht visits), 2020-21 season excluded.

	2018-19	2019-20	2021-22	2022-23	2023-24
Ardley Island	4	11	11	8	6
Astrolabe Island	4	9	1	3	10
Baily Head	14	18	11	6	7
Barrientos (Aitcho) Island	42	52	18	40	45
Brown Bluff	56	90	68	83	105
Cape Denison	0	0	0	0	0
Cape Evans	3	5	1	10	10
Cape Hallett	0	1	0	2	3
Cape Royds	2	4	2	7	7
Cuverville Island	160	173	126	202	183
Damoy Point / Dorian Bay	86	95	71	188	157
Danco Island	107	112	80	153	145
Detaille Island	6	20	1	25	44
Devil Island	11	15	17	34	24
D'Hainaut (Mikkelsen Harbour)	89	86	59	128	135
George's Point (Ronge Island)	18	28	7	29	22
Goudier (Port Lockroy) Island	174	131	33	148	20
Halfmoon Island – Chinstrap Colony	131	155	78	130	132
Hannah Point & Walker Bay	18	8	10	16	8
Horseshoe Island	7	14	10	30	24
Jougla Point	95	79	38	76	62
Neko Harbour	157	191	94	179	193
Orne Harbour	58	76	49	95	122
Orne Islands	8	22	14	15	17
Paulet Island	29	49	35	54	39
Pendulum Cove	17	26	9	16	29
Penguin Island	11	16	14	13	16
Petermann Island	55	107	45	143	148
Pleneau Island	25	37	21	52	70
Point Wild	3	2	2	1	5
Portal Point	63	112	61	159	175
Port Charcot	48	80	32	104	127
Shingle Cove	2	2	9	11	13

Snow Hill Island, Nordenskjold's hut	6	2	7	19	8
Stonington Island	7	9	13	37	23
Taylor Valley / Canada Glacier	0	2	0	2	0
Telefon Bay	71	57	30	97	82
Torgersen Island*	13	8	0	0	0
Turret Point	12	7	5	3	9
Whalers Bay	149	147	85	169	183
Wordie House	21	25	2	24	32
Yalour Islands	7	22	5	45	48
Yankee Harbour	53	65	29	84	64

\* No Longer a Visitor Site

**Appendix III:** Number of landed and non-landed visits to sites covered by IAATO Site Specific Guidelines for the 2023-24 season, including yachts

<b>Site</b>	<b>2022-23</b>	<b>2023-24</b>	<b>Vessel Category</b>
<b>Bongrain Point</b>	31	15	1 and 2 Landed
<b>Cape Lookout</b>	6	8	1 Landed
<b>Chiriguano Bay</b>	37	49	Marine only
<b>Cierva Cove</b>	179	135	Marine only
<b>Elephant Point</b>	34	6	1 and 2 Landed
<b>Enterprise Island/Foyn Harbour</b>	212	88	1 Landed
<b>False Island Point</b>	7	1	1 and 2 Marine
<b>Fish Islands</b>	43	33	1 and 2 Landed
<b>Fort Point</b>	14	29	1 and 2 Landed
<b>Gourdin Island</b>	8	23	1 Landed
<b>Hidden Bay</b>	35	23	Marine Only
<b>Hovgaard Island</b>	42	37	1 and 2 Landed
<b>Hydruga Rocks</b>	66	60	1 Landed
<b>Jenny Island</b>	15	16	1 Landed
<b>Kerr Point (Ronge Island)</b>	23	18	1 and 2 Landed
<b>Kinnes Cove/Madder Cliffs</b>	15	27	1 Landed
<b>Leith Cove</b>	26	52	1 and 2 Landed
<b>Melchior Island</b>	95	56	1 and 2 Landed
<b>Penguin Point</b>	0	1	1 and 2 Landed
<b>President Head</b>	17	22	1 and 2 Landed

<b>Prospect Point</b>	26	25	1 and 2 Landed
<b>Red Rock Ridge</b>	25	18	1 and 2 Landed
<b>Robert Point</b>	7	12	1 and 2 Landed
<b>Snow Hill Emperor Penguin Colony</b>	8	10	1 Landed
<b>Spert Island</b>	48	67	Marine Only
<b>Useful Island</b>	56	50	1 Landed
<b>View Point</b>	3	7	1 and 2 Landed