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Report on IAATO Operator Use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines, 2017-18 Season

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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 2017-2018 season. No non-IAATO visits are included in this analysis.

Additional information on IAATO operator activities can be found in *ATCM XLI IP71 IAATO Overview of Antarctic Tourism 2017/18 Season and Preliminary Estimates for 2018/19* and on the IAATO website (www.iaato.org).

Antarctic Peninsula traditional ship-borne tourism

Antarctic tourism continues to be primarily focused on traditional commercial ship-borne tourism in the Antarctic Peninsula, which accounts for over 95% of all landed activity.

Figure 1 provides a comparison of the factor increase in different aspects of this activity (number of passengers, ships, voyages, landings made and sites used). As all traditional commercial ship-borne tourism with landings to the Peninsula during the 2017-18 season was conducted by IAATO Operators, it is believed that this information is representative of actual activity levels.

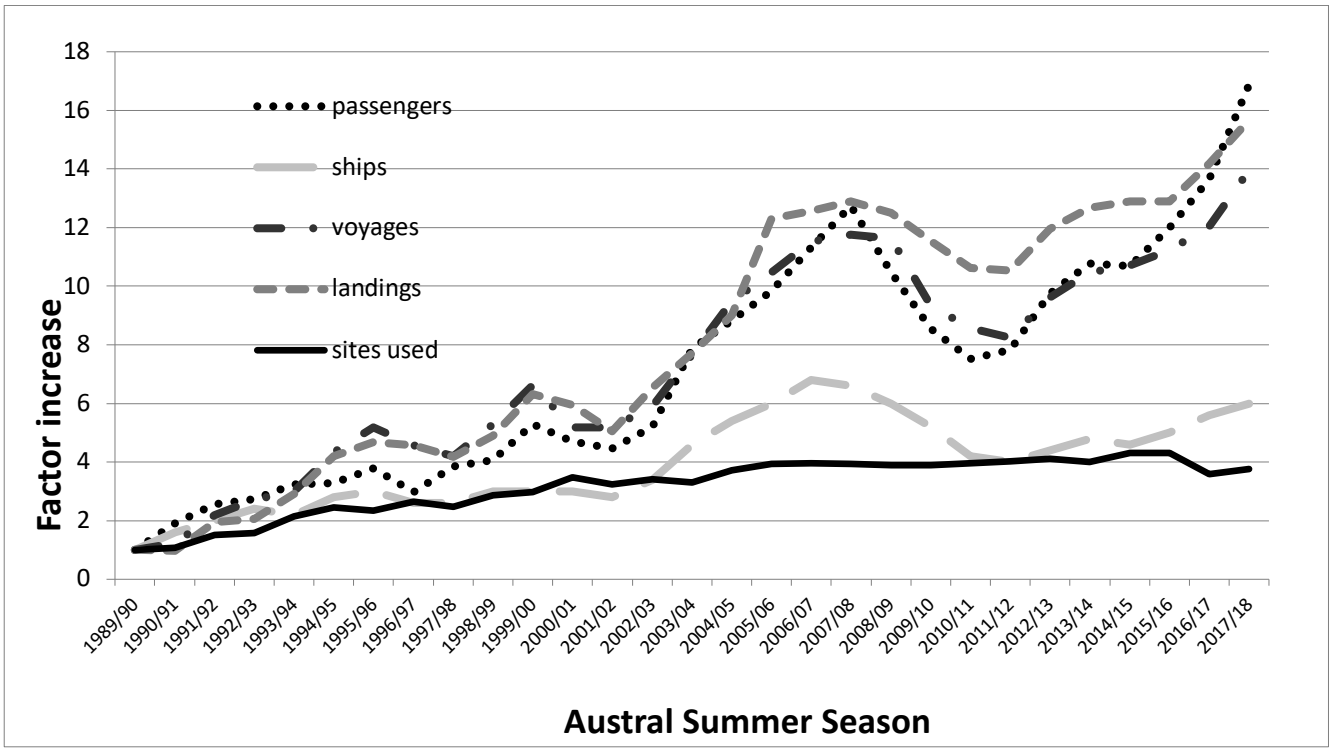


Figure 1: Factor Change in Traditional Landing Ship-borne Tourism in the Antarctic Peninsula 1989-2018.

Comparing the 2017-18 season with the previous peak season of 2007-2008, the following trends are visible:

- Since 2011-2012 there has been a recovery in the number of passengers taking part in traditional ship borne tourism to the Peninsula following the global recession in 2008. This growth has been

variable, however the total number of passengers from ships making landings in the Antarctic Peninsula in 2017-18 (41,517) has surpassed the previous 2016-17 total (of 33,580). In part this is due to vessels being operated with higher passenger capacity, with all vessels benefiting from the current world economic strength and operating at near-full passenger capacity for the whole season. Additionally, visitor operations continue to expand into the 'shoulder' seasons, resulting in an increased number of voyages (see below).

- Following the previous decline in IAATO ships operating in the area, from 33 in 2007-08 to 20 in the 2011-12 season, there has been a steady increase, with 30 SOLAS passenger vessels making landings in the Peninsula in the 2017-18 season. Three new SOLAS vessels joined the IAATO fleet during the 2017-18 season - Island Sky, Ocean Atlantic, and Silver Cloud. Island Sky operated as an IAATO Category 1 (13-200 passenger), whereas Ocean Atlantic and Silver Cloud can operate either as Category 1 or Category 2 (201-500 passenger) vessels. All three operated at near to maximum clients for each voyage.
- There has been an 13% increase in the number of voyages (from 236 in 2015-16, 253 in the 2016-17 season, and most recently 293 during the 2017-18 season). The previous peak in 2007/08 totalled 247 voyages. This is likely reflective of the popularity of air/cruise tourism which negates the need for four to five days per voyage outside Antarctic Treaty waters to facilitate passenger turnarounds in Antarctica and accounts for the increase in the number of passengers, and the increase in the number of vessels.
- There was a 9% increase in the number of landings made from last season (2,427 to 2,679). This is consistent with the increase in voyages.
- There was a 16% increase in the number of landing sites used since last season (125 to 166). This is likely due to favourable ice conditions encountered south of the Lemaire Channel and south of the Antarctic Circle for the entirity of the 2017/18 season.

Specific Landing Site Use

Appendix 1 Table 1 lists the 20 most-visited sites in terms of landings made, for the 2017-18 season.

The top five sites (Goudier Island, Cuverville Island, Neko Harbour, Halfmoon Island and Whalers Bay) accounted for 25% of all passengers landed and 27% of landings made during the season. The top twenty most visited sites accounted for circa 68% of the landings, with the top 25 landing sites accounting for circa 75% of the landings.

These percentages of activity at a small number of sites indicate the trend of landings concentrating at a few popular sites remains consistent. See also ATCM XXXIX IP 104 *Patterns of Tourism in the Antarctic Peninsula Region: A 20-year analysis.*

All of the most-visited sites are covered by site specific management plans, either through ATCM Visitor Site Guidelines or National Program management through their proximity to stations.

Appendix 2 illustrates the total number of landings made per day at all sites within the Antarctic Peninsula in the 2017-18 season. Landings occurred in the Antarctic Treaty Area from 28 October 2017 – 28 March 2018 (a total of 151 days); 13% less than the peak of 174 days in the 2007/08 season. (The extended season in 2007/08 was largely due to the operation of the icebreaker Kapitan Khlebnikov making early season visits to emperor penguin colonies). As in previous seasons, there is variation in levels of activity; for example, in the peak season the highest number of landings made on any one day (02 January) was 46, while the lowest number in the same period was 16 landings (16 January).

The core duration for visitation by ships was a 90 day period between early December to early March. Despite the increase in activites, on the basis of the full season dates only two sites (Goudier Island and Cuverville Island), received an average of more than one visit per day throughout the season. An additional three sites (Neko Harbour, Whaler's Bay and Half Moon Island) received an average of more than one visit per day during the core season. All operations therefore remained well within individual site guideline visitation capacities.

Additional tourism statistics will be made available on the IAATO website (www.iaato.org).

Use of ATCM Visitor Site Guidelines

An assessment of the use of the sites covered by the ATCM Visitor Site Guidelines was conducted through feedback directly from field staff and an analysis of the Post Visit Report Forms. Appendix 3 illustrates the total number of known landings made at sites covered by ATCM Visitor Site Guidelines, including a listing of the number of occasions the daily visitation limits were met.

Co-ordination between IAATO field staff remains very effective. Analysis of the Post Visit Report Forms indicates that the daily limits set in the site guidelines were honoured during the 2017-18 season.

Conclusion

The information extracted from the ATCM Post Visit Reports shows that overall tourism levels have increased from the peak season of 2007-08, as highlighted in *ATCM XL IP71 IAATO Overview of Antarctic Tourism 2017/18 Season and Preliminary Estimates for 2018/19* are likely to exceed these numbers during the 2018/19 season. The increase is not uniform however, with a few sites receiving the majority of the increase, and others seeing a decrease in activity. The pattern of concentrated increase is believed to be explained by the popularity of these sites for their reliable access and ease of visitor management. The entry into the market of larger capacity vessels and the gradual increase in air/cruise tourism has also contributed.

All of the top twenty landing sites on the Peninsula are managed by ACTM Visitor Site Guidelines or through National 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 1: Top Twenty Most Visited Sites
Appendix 2: Total number of IAATO Operator landings made per day, at all sites within the Antarctic during the 2017-18 season
Appendix 3: Recorded Site Use at Sites covered by ATCM Visitor Site Guidelines during the 2017-18 season.

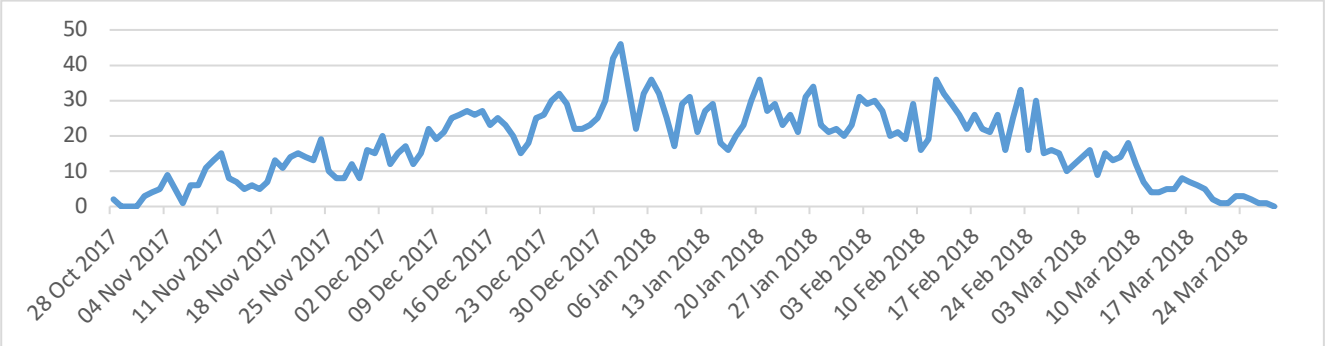
Appendix 1: Top Twenty Most Visited Sites

Table 1: Top Twenty Most Visited Sites during the 2017-18 Season (including yacht visits)

Rank	Landing Site	Number of Landed Visits	Number of Landed Tourists	Site Guidelines / National Programme Management
1	Goudier Island	159	17,280	ATCM Site Guidelines
2	Cuverville Island	151	20,145	ATCM Site Guidelines
3	Neko Harbor	142	24,982	ATCM Site Guidelines
4	Half Moon Island	139	22,449	ATCM Site Guidelines
5	Whalers Bay	134	15,952	ATCM Site Guidelines
6	Brown Station	96	13,981	National Prog. Management
7	Petermann Island	94	12,787	ATCM Site Guidelines
8	Jougla Point	92	8,057	ATCM Site Guidelines
9	Danco Island	90	17,228	ATCM Site Guidelines
10	Damoy Point/Dorian Bay	75	12,141	ATCM Site Guidelines
11	Port Charcot	71	9,778	ATCM Site Guidelines
12	Mikkelsen Harbor (D'Hainaut)	69	8,383	ATCM Site Guidelines
13	Brown Bluff	65	9,272	ATCM Site Guidelines
14	Aitcho Islands - Barrientos Island	61	8,998	ATCM Site Guidelines
15	Telefon Bay	58	7,356	ATCM Site Guidelines
16	Yankee Harbor	55	8,199	ATCM Site Guidelines
17	Orne Harbor	53	6,760	ATCM Site Guidelines
18	Portal Point	51	7,654	ATCM Site Guidelines
19	Vernadsky Station	51	4,213	National Prog. Management
20	Great Wall Station	40	11,738	National Prog. Management

Appendix 2: Total number of IAATO Operator landings made per day, at all sites within the Antarctic 2016-17 season

A. Total number of IAATO Operators landings made per day at all sites within the Antarctic 2017-18 season



Appendix 3: Recorded Site Use at Sites covered by ATCM Visitor Site Guidelines.

Recorded Site Use at ATCM Site Guideline Sites 2017-18

Landing Site	2017-18	
	Total Number of Landings	**Number of days when maximum visit limitation was met**
Ardley Island	6	0
Baily Head	14	1
Barrientos (Aitcho) Island	61	3
Base Brown	96	1
Brown Bluff	65	0
Cape Denison	1	0
Cape Evans	2	0
Cape Hallett	0	0
Cape Royds	2	0
Cuverville Island	151	6
Damoy Point / Dorian Bay	75	1
Danco Island	90	1
Detaille Island	19	1
Devil Island	4	0
D'Hainaut (Mikkelsen Harbour)	69	0
Goudier (Port Lockroy) Island	159	10
Halfmoon Island	139	4
Hannah Point & Walker Bay	16	16
Horseshoe Island	4	0
Jougla Point	92	5
Neko Harbour	142	0
Orne Harbour	53	0
Orne Islands	8	0
Paulet Island	28	5
Pendulum Cove	14	0
Penguin Island	20	0
Petermann Island	94	0
Pleneau Island	36	0
Point Wild	3	1
Port Charcot	71	14
Shingle Cove	1	0
Snow Hill Island, Nordenskjold's hut	1	1
Stonington	8	1
Taylor Valley / Canada Glacier	0	0
Telefon Bay	58	0
Torgersen Island	1	0
Turret Point	14	0
Winter Island	7	0
Whalers Bay	134	0
Wordie House	26	3
Yalour Islands	17	2
Yankee Harbour	55	1