

IP 164

ENG



Agenda Item: ATCM 17,
CEP 9c
Presented by: IAATO
Original: English
Submitted: 28/04/2017

**Report on IAATO Operator Use of
Antarctic Peninsula Landing Sites and
ATCM Visitor Site Guidelines, 2016-17
Season**

Report on IAATO Operator Use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines, 2016-2017 Season

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 the data collected by IAATO from IAATO Operator Post Visit Report Forms for the 2016-2017 season. No non-IAATO visits are included in this analysis.

Additional information on IAATO operator activities can be found in ATCM XL IPxx *IAATO Overview of Antarctic Tourism 2016/17 Season and Preliminary Estimates for 2017/18* 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 2016-17 season was conducted by IAATO Operators, it is believed that this information is reflective of actual levels of this activity.

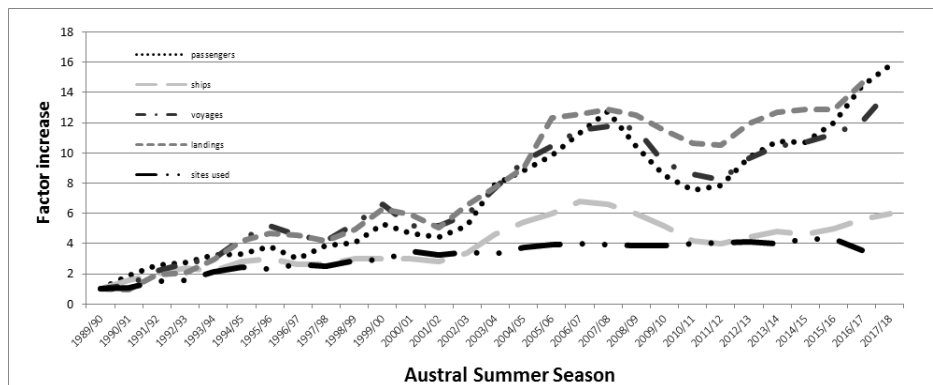


Figure 1: Factor Change in Traditional Landing Ship-borne Tourism in the Antarctic Peninsula 1989-2017, and the projected factor change for 2017-18

Comparing the 2016-17 season with the 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 2016-17 (35,537) has now surpassed the 2007-08 peak (31,352). In part this is due to new vessels being operated with higher passenger capacity and also due to the increased number of voyages (see below).

- Following the steady decline in IAATO ships operating in the area, from 33 in 2007-08 to only 20 in the 2011-12 season, there has been a resurgence with 28 SOLAS passenger vessels making landings in the Peninsula in the 2016-17 season. Notably, many of the new ships entering the market – in both the IAATO Category 1 (13-200 passenger) and Category 2 (201-500 passenger) brackets, are operated at near to maximum number of clients for each category (e.g. Le Soleal and Le Lyrial with 200 clients and Seabourn Quest and Midnatsol operating with 450+ clients).
- There has been an increase in the number of voyages (from 225 in 2014-15, to 236 in 2015-16, and now reaching 253 during the 2016-17 season). The previous peak in 2007/08 totalled 247 voyages. This is reflective of a move towards more 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 10% increase in the number of landings made from last season (2206 to 2427), this is lower than expected when considering the increase in voyages, however reflective of the increase in Category 2 vessels which may only be able to make one landing per day.

There was a decrease in the number of landing sites used (125 to 111). This is believed to be due to the heavy ice conditions encountered south of the Lemaire Channel for the entirety of the 2016/17 season.

Commented [VW1]: I would suggest reversing these so you lead with Le Soleal and Le Lyrial since they are the Category 1 ships and then follow with Seabourn Quest and Midnatsol as the Category 2 ships... Again a stylistic preference.

Specific Landing Site Use

Appendix 1 Table 1 illustrates the 20 most-visited sites in terms of landings made for the 2016-17 season.

The top five sites (Cuverville Island, Whalers Bay, Goudier Island, Halfmoon Island and Neko Harbour) accounted for 35% of all tourists landed and 28% of landings made during the season. The top twenty most visited sites accounted for circa 64% of the landings, with the top twenty five landing sites accounting for just over 70% of the landings.

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

All of these 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 2016-17 season. Landings took place in the Antarctic Treaty Area from 1 November 2016 – 1 April 2017 (a total of 151 days). This is considerably 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 years there is a natural variation throughout the season in levels of activity; for example in the peak season the greatest number of landings made on any one day (31 December) was 35, while the lowest number in the same period was 11 landings (16 January).

The core period for visitation by ships was 90 days between early December to early March. Despite the increase in activities, on the basis of the full season dates only two sites (Cuverville Island and Whaler's Bay), received an average of more than one visit per day throughout the season, with an additional three sites (Neko Harbour, Goudier Island and Half Moon Island) receiving an average of more than one visit per day during the core season.

Additional tourism statistics will be posted 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 among 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 2016-17 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, and, as highlighted in ATCM XL IPxx *IAATO Overview of Antarctic Tourism 2016/17 Season and Preliminary Estimates for 2017/18* are likely to exceed these numbers during the 2017/18 season. The increase is not uniform however, with a few sites absorbing the majority of the increase, and others seeing a decrease in activity. The pattern of concentrated increase is believed to be explained in part by the popularity of these sites due to their reliability of access and ease of visitor management at these sites but also the entry into the market of larger capacity vessels, and the increase in air/cruise tourism.

All the landing sites in 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 2016-17 season
- Appendix 3: Recorded Site Use at Sites covered by ATCM Visitor Site Guidelines during the 2016-17 season.

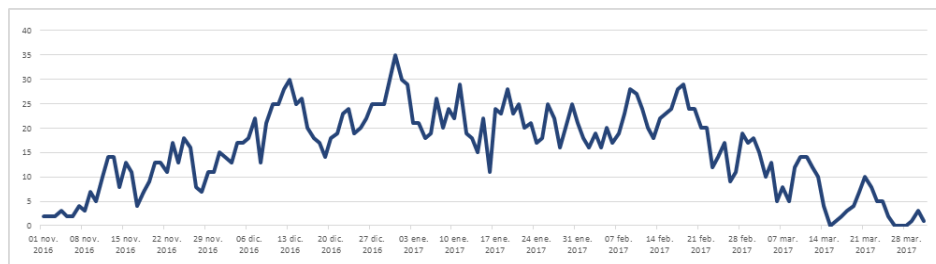
Appendix 1: Top Twenty Most Visited Sites

Table 1: Top Twenty Most Visited Sites during the 2016-17 Season (including yacht visits)

Rank	Landing Site	Number of Landed Visits	Number of Landed Tourists	Site Guidelines / National Programme Management
1	Cuverville Island	158	24318	ATCM Site Guidelines
2	Whalers Bay	154	20172	ATCM Site Guidelines
3	Goudier Island	143	17349	ATCM Site Guidelines
4	Half Moon Island	129	22200	ATCM Site Guidelines
5	Neko Harbor	115	22054	ATCM Site Guidelines
6	Jougla Point	85	7499	ATCM Site Guidelines
7	Almirante Brown Station	81	10197	National Programme Management
8	Mikkelsen Harbor (D'Hainaut)	79	10368	ATCM Site Guidelines
9	Brown Bluff	74	13102	ATCM Site Guidelines
10	Damoy Point/Dorian Bay	70	7672	ATCM Site Guidelines
11	Danco Island	69	10768	ATCM Site Guidelines
12	Petermann Island	63	7437	ATCM Site Guidelines
13	Orne Harbor	53	5271	ATCM Site Guidelines
14	Aitcho Islands - Barrientos Island	50	6769	ATCM Site Guidelines
15	Telefon Bay	50	6856	ATCM Site Guidelines
16	Vernadsky Station	41	3710	ATCM Site Guidelines
17	Yankee Harbor	37	5087	ATCM Site Guidelines
18	Portal Point	34	4101	ATCM Site Guidelines
19	Waterboat Point/Gonzalez Videla Station	30	6480	National Programme Management
20	Port Charcot	29	3242	ATCM Site Guidelines

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 2016-17 season



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

Recorded Site Use at ATCM Site Guideline Sites 2016-17

Landing Site	2016-17	
	Total Number of Landings	Number of days where maximum visit limitation was met.
Ardley Island	6	0
Baily Head	14	1
Barrientos (Aitcho) Island	50	6
Base Brown	81	0
Brown Bluff	74	0
Cape Dennison	0	0
Cape Evans	5	0
Cape Hallett	0	0
Cape Royds	3	0
Cuverville Island	158	3
Damoy Point / Dorian Bay	70	10
Danco Island	69	1
Detaille Island	17	3
Devil Island	8	0
D'Hainaut (Mikkelsen)	79	0
Goudier (Port Lockroy) Island	143	37
Halfmoon Island	129	3
Hannah Point & Walker Bay	24	24
Horseshoe Island	6	0
Jougla Point	85	6
Neko Harbour	115	3
Orne Harbour	53	1
Orne Islands	12	0
Paulet Island	20	2
Pendulum Cove	15	0
Penguin Island	15	1
Petermann Island	63	3
Pleneau Island	21	1
Point Wild	8	1
Port Charcot	28	5
Shingle Cove	4	0
Snow Hill Island – Nordenskjold's hut	1	0
Stonington	2	0
Taylor Valley / Canada Glacier	1	0
Telefon Bay	50	0
Torgersen Island	4	0
Turret Point	3	0
Winter Island	12	0
Whalers Bay	154	0
Wordie House	12	1
Yalour	10	0
Yankee Harbour	37	0