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Agenda Item: ATCM 17, ATCM 18,
CEP 9c
Presented by: IAATO
Original: English
Submitted: 23 May 2025

A Five-Year Overview and 2024-25 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 has an ongoing commitment 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 (PVRs) for the Antarctic Peninsula during the 2024-25 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 47 IP032 *IAATO Vessel Overview of Antarctic Tourism: 2024-25 Season and Preliminary Estimates for 2025-26 Season*. Additional information on IAATO Site Management techniques can be found in ATCM 46 (2024) IP108 *IAATO Site Management Methods*.

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 numbers (vessels carrying 12 passengers or fewer) are only included where specifically mentioned. Cruise Only vessels are not included in any of the data represented.

Figure 1 presents a comparison of the factor increase in various aspects of traditional commercial seaborne tourism since 1989, including the number of passengers, ships, voyages, landings made, and sites used.

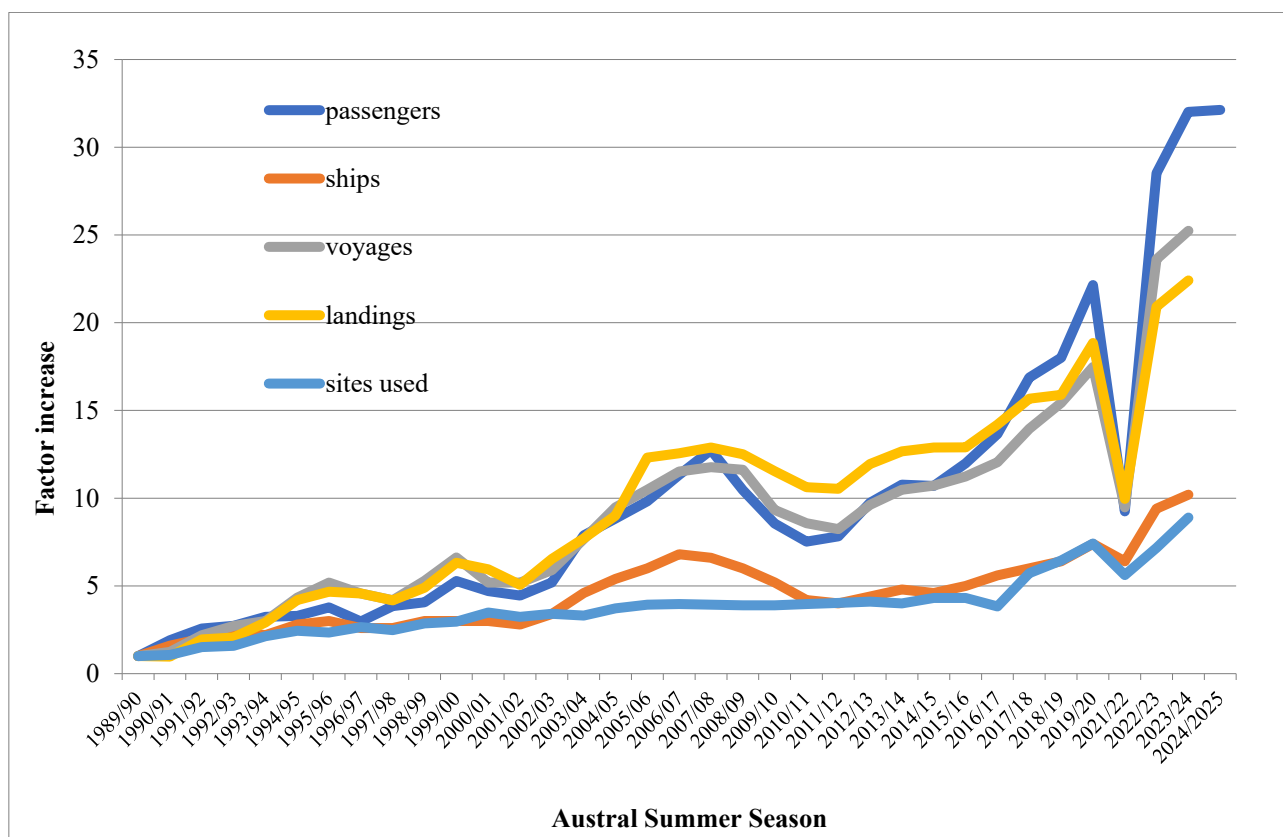


Figure 1: Factor Change in Traditional Landing Ship-borne Tourism in the Antarctic Peninsula 1989-2024 (without 2020-21).

During the 2024-25 season, all traditional commercial SOLAS seaborne tourism with landings around the Peninsula was conducted by IAATO Operators. *Table 1* provides a detailed summary of the number of passengers, voyages, landings, sites and vessels over the past five seasons. It shows the industry growth over the period 2019-2024, and the projected number of passengers and voyages around the Peninsula for 2025-26.

Table 1: Comparison between the number of landed passengers, voyages, landings, sites and SOLAS vessels on the Antarctic Peninsula for the past five years, 2019–2024, and projected* number of passengers, vessels and voyages for 2025-26. The data presented in Table 1 include IAATO-operated yachts.

Season	2019-20	2021-22	2022-23	2023-24	2024-25	2025-26
Passengers	54485	22979	70296	78902	79179	78136*
Voyages	367	235	514	553	555	552*
Landings	3223	1703	3576	3832	3666	-
Sites	215	163	208	258	213	-
SOLAS Vessels (Cat 1 and 2)	37	32	47	51	49	47*

The above data can be attributed to:

- There has been substantial investment by operators in existing and new build vessels, since the IMO's International Code for Ships Operating in Polar Waters (Polar Code 2017) was adopted, with the first new SOLAS vessels launched in 2019.
- 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, resulting in lower occupancy, and had to truncate 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, many Category 1 vessels added to the fleet now operate at their upper limit capacity of 200 passengers.
- The number of sites used for landings during the 2024-25 season has decreased. This can be attributed to:
 - Analysis of site use and activities (found in ATCM 47 IP032 *IAATO Vessel Overview of Antarctic Tourism: 2024-25 Season and Preliminary Estimates for 2025-26 Season*) has shown operators are responding to IAATO's multilayered strategy to encourage them to spread activities across a range of platforms and sites: ship cruising; small boat cruising; kayaking; etc., to reduce landed activities. IAATO has encouraged this practice since 2012 and strengthened it during our 2019 annual meeting by incorporating into our Bylaws and the IAATO Code of Conduct for Vessels.
 - Operators utilising sites for marine activities rather than landings (e.g. small boat cruising, kayaking).
 - More accurate reporting of site information by operators and refinement of data when PVRs are submitted. Each PVR is manually checked to ensure that data is recorded accurately, and individual follow-up with operators occurs as needed.
 - Heavy Ice during the early season, blocking landing sites.
 - Difficult weather during the latter half of the season led to cancelled landings and voyages being shortened by a day or more.

Specific Landing Site Use for the 2024-25 season

The top five landed visitor sites by vessels for the 2024-25 season were Neko Harbour, Whaler's Bay, Damoy Point/Dorian Bay, Danco Island and Portal Point. These site visits account for approximately 25% of all landed visits made during the season. The top 20 most-visited sites accounted for approximately 62% of all landed visits.

Appendix I lists the 20 most-visited sites in terms of landed visits made by vessels from 2019-2024 (2020-21 excluded).

Figure 2 illustrates the landed activity levels per day at all sites within the Antarctic Peninsula over a five-year period (2019-2024). During the 2024-25 season, landings occurred in the Antarctic Treaty area over a period of approximately 162 days from 22 October to 01 April.

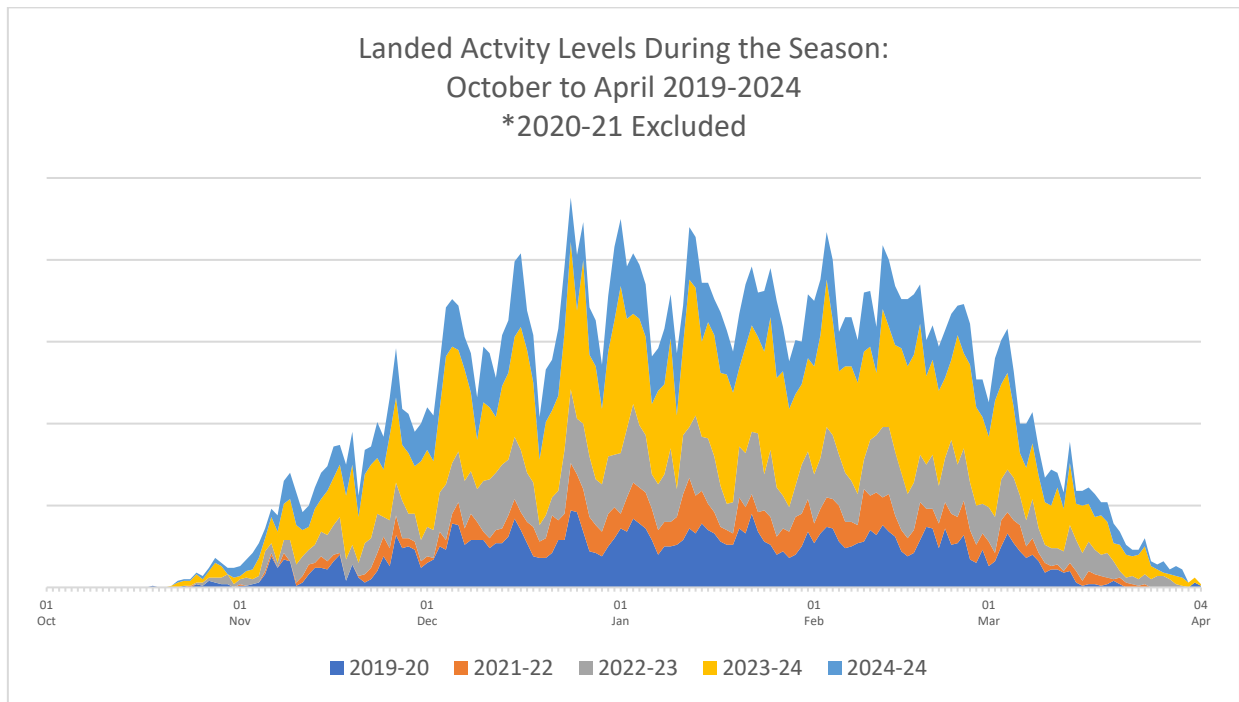


Figure 2: Landed Activity levels at all sites within the Antarctic Peninsula 2019-2024.

There is variation in levels of activity. These peaks and troughs are remarkably similar from season to season, demonstrating fluctuations in visitation levels resulting from expedition schedules largely revolving around holiday season timetables.

Factors such as ice patterns and weather are also powerful contributors to site selection and visitation patterns, by either allowing or restricting access. Additionally, during the 2024-25 season, site selection focused on enhanced biosecurity procedures for Highly Pathogenic Avian Influenza (HPAI). As a result, sites such as Portal Point and Whalers Bay experienced higher visitation due to their open spaces, which were located away from wildlife. Similarly, Cuverville had less visitation as it was closed due to HPAI precautions for part of the season. In Appendix II and III, sites which had closures due to HPAI precautions are also noted.

Use of ATCM Visitor Site Guidelines

Appendix II provides a five-year analysis (2019-2024) 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 shipborne and yacht tourism in the Antarctic Peninsula.

IAATO receives feedback on site usage from Competent Authorities/National Antarctic Programs, those in the field with IAATO Operators and/or through the IAATO Site Stewardship program. This information is analysed and reviewed if adjustments are needed to existing site guidelines or creation of new site guidelines.

This site feedback includes both ATCM Guidelines and IAATO Guidelines. In the scenario, when an ATCM Site Guideline is not under review by the Parties, addendums are added to the existing site guidelines in the IAATO Field Operations Manual (FOM).

Over the last four seasons, IAATO identified five ATCM Site Guidelines which had suggested updates for environmental or safety reasons. These sites are:

- Astrolabe Island (IAATO Addendum to ATCM Guideline)
- Devil Island (IAATO Addendum to ATCM Guideline)
- Neko Harbour (IAATO Addendum to ATCM Guideline)

- Paulet Island (IAATO Addendum to ATCM Guideline)
- Stonington Island (IAATO Addendum to ATCM Guideline)

These suggested updates have been submitted by the United Kingdom ATCM47 (2025) *WP021 Proposed updates to Five Site Guidelines*.

Use of IAATO Visitor Site Guidelines

In addition to the ATCM Visitor Site Guidelines, IAATO Operators are also bound by IAATO Visitor Site Guidelines, which have been implemented to further support site management where ATCM Site Guidelines are not yet in place. The sites can be either terrestrial or marine-based, and the criteria by which they are created include 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 the review of any existing IAATO site-specific guidelines.

IAATO adopted one updated and 14 new IAATO Site Guidelines at its 2025 annual meeting. These guidelines, both terrestrial and marine-based, can be found as attachments to IP034.

The 2025 IAATO site guidelines adopted into the IAATO Field Operations Manual (FOM) are:

1. Charlotte Bay (Marine Only)
2. Curtiss Bay (Marine Only)
3. Enterprise Island, Foyen Harbour
4. Flandres Bay (Marine Only)
5. Gourdin Island
6. Melchior Islands (Marine Only)
7. Palaver Point, Two Hummock Island
8. Punta Vidt
9. Red Rock Ridge (updated from 2023)
10. Sandefjord Bay, Coronation Island (Marine Only)
11. Skontorp Cove (Marine Only)
12. Stony Point
13. Tay Head
14. The Naze, James Ross Island
15. Useful Island

Tourism Statistics

IAATO has been collating data from its operators regarding visits to Antarctica for three decades. During that time, changes have been made to the data collected, which now encompass more detailed activity categories and updates to site names. Until recent years, the collating was done manually. Increased capabilities in technology have allowed large data sets to be analysed more effectively and quickly than previously possible. This has brought to IAATO's attention certain anomalies in the historical data (i.e. terrestrial landings at marine-

only sites). Therefore, IAATO strongly recommends that users utilise the most recent information available from IAATO when performing analyses.

To request IAATO data, please visit: <https://iaato.org/news-room/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 Appendices II and III. 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, 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 the top 20 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 2019-24 Seasons (including yacht visits)

Appendix II: Landed Site visits per season covered by the ATCM Visitor Site Guidelines from 2019-24 season (including yacht visits)

Appendix III: Number of landed and non-landed visits to sites covered by IAATO Site Specific Guidelines for the 2022-24 season, including yachts

Appendix I: Number of landings per season at the top 20 Landed Site Visits between 2019-24 (including yacht visits) *2020-21 season excluded

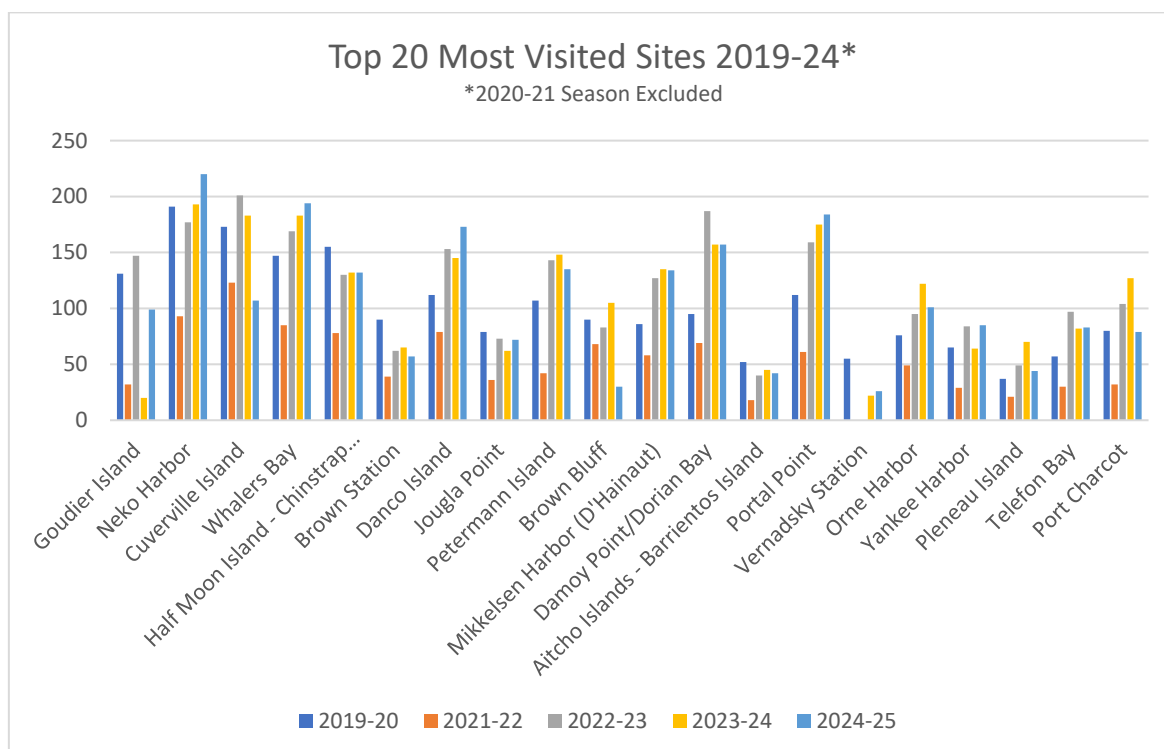
	2019-20	2021-22	2022-23	2023-24	2024-25
Goudier Island	131	33	148	20	99

Neko Harbor	191	94	179	193	220
Cuerville Island	173	126	202	183	107*
Whalers Bay	147	85	169	183	194
Half Moon Island - Chinstrap Colony	155	78	130	132	132
Brown Station	90	40	61	65	57
Danco Island	112	80	153	145	173
Jougla Point	79	38	76	62	72
Petermann Island	107	45	143	148	135
Brown Bluff	90	68	83	105	30*
Mikkelsen Harbor (D'Hainaut)	86	59	128	135	134
Damoy Point/Dorian Bay	95	71	188	157	157
Aitcho Islands - Barrientos Island	52	18	40	45	42
Portal Point	112	61	160	175	184
Vernadsky Station	55	3	5	22	26
Orne Harbor	76	49	95	122	101
Yankee Harbor	65	29	84	64	85
Pleneau Island	37	21	52	70	44
Telefon Bay	57	29	97	82	83
Port Charcot	80	33	106	127	79

** Brown Bluff was closed December 12, 2024 – February 26, 2025, due to HPAI precautions*

** Cuerville Island was closed December 11, 2024 – January 22, 2025, due to HPAI precautions*

Graphical Depiction of Appendix I: Number of Landings per season at the Top 20 Landed Sites 2019-24 Seasons (including yacht visits)



Appendix II: Landed site visits per season covered by the ATCM Visitor Site Guidelines from 2019-24 season (including yacht visits), 2020-21 season excluded.

	2019-20	2021-22	2022-23	2023-24	2024-25
Ardley Island	11	11	8	6	5
Astrolabe Island	9	1	3	10	7
Baily Head	18	11	6	7	6

Barrientos (Aitcho) Island	52	18	40	45	42
Brown Bluff	90	68	83	105	30*
Cape Denison	0	0	0	0	3
Cape Evans	5	1	10	10	7
Cape Hallett	1	0	2	3	0
Cape Royds	4	2	7	7	7
Cuerville Island	173	126	202	183	107*
Damoy Point / Dorian Bay	95	71	188	157	157
Danco Island	112	80	153	145	173
Detaille Island	20	1	25	44	34
Devil Island	15	17	34	24	6
D'Hainaut (Mikkelsen Harbour)	86	59	128	135	134
George's Point (Ronge Island)	28	7	29	22	37
Goudier (Port Lockroy) Island	131	33	148	20	99
Halfmoon Island – Chinstrap Colony	155	78	130	132	132
Hannah Point & Walker Bay	8	10	16	8	8
Horseshoe Island	14	10	30	24	21
Jougla Point	79	38	76	62	72
Neko Harbour	191	94	179	193	220
Orne Harbour	76	49	95	122	101
Orne Islands	22	14	15	17	14
Paulet Island	49	35	54	39	20
Pendulum Cove	26	9	16	29	37
Penguin Island	16	14	13	16	28
Petermann Island	107	45	143	148	135
Pleneau Island	37	21	52	70	44
Point Wild	2	2	1	5	5
Port Charcot	80	32	104	127	79
Portal Point	112	61	159	175	184
Shingle Cove	2	9	11	13	3
Snow Hill Island, Nordenskjold's hut	2	7	19	8	0
Stonington Island	9	13	37	23	21
Taylor Valley / Canada Glacier	2	0	2	0	2
Telefon Bay	57	30	97	82	83
Torgersen Island**	8	0	0	0	0
Turret Point	7	5	3	9	5

Whalers Bay	147	85	169	183	194
Wordie House	25	2	24	32	45
Yalour Islands	22	5	45	48	42
Yankee Harbour	65	29	84	64	85

** Brown Bluff was closed December 12, 2024 – February 26, 2025, due to HPAI precautions*

** Cuverville Island was closed December 11, 2024 – January 22, 2025, due to HPAI precautions*

**** No Longer a Visitor Site**

Appendix III: Number of landed and non-landed visits to sites covered by IAATO Site Specific Guidelines 2022-24 season, including yachts.

Site	2022-23	2023-24	2024-25	Vessel Category
Bongrain Point	31	15	8*	1 and 2 Landed
Cape Lookout	6	8	15	1 Landed
Charlotte Bay	40	51	69	Marine Only

Chiriguano Bay	16	49	43	Marine Only
Cierva Cove	112	138	126	Marine Only
Curtiss Bay	14	21	29	Marine Only
Elephant Point	24	6	13	1 and 2 Landed
Enterprise Island/Foyn Harbour	74	93	90	1 Landed
False Island Point	6	1	2	1 and 2 Marine
Fish Islands	23	33	24	1 and 2 Landed
Flanders Bay	16	1	41	Marine Only
Fort Point	14	29	47	1 and 2 Landed
Gourdin Island	7	24	10	1 Landed
Hidden Bay	22	23	20	Marine Only
Hovgaard Island	30	38	38	1 and 2 Landed
Hydruga Rocks	47	60	32	1 Landed
Jenny Island	10	16	6*	1 Landed
Kerr Point (Ronge Island)	23	18	30	1 and 2 Landed
Kinnes Cove/Madder Cliffs	11	27	21	1 Landed
Leith Cove	23	52	47	1 and 2 Landed
Melchior Island	71	59	102	1 and 2 Landed
Palaver Point	28	86	117	1 and 2 Landed
Penguin Point	0	2	1	1 and 2 Landed
President Head	15	22	23	1 and 2 Landed
Prospect Point	16	25	15	1 and 2 Landed
Punta Vidt	2	18	35	1 and 2 Landed
Red Rock Ridge	14	18	20	1 and 2 Landed

Robert Point	7	12	3*	1 and 2 Landed
Sandefjord Bay	2	3	1	Marine Only
Skontorp Cove	65	72	88	Marine Only
Snow Hill Emperor Penguin Colony	8	11	3	1 Landed
Spert Island	33	67	62	Marine Only
Stony Point	9	9	21	1 and 2 Landed
Tay Head	11	13	5*	1 and 2 Landed
The Naze	14	10	2	1 and 2 Landed
Useful Island	56	50	8*	1 Landed
View Point	3	8	1	1 and 2 Landed

**Bongrain Point was closed January 19, 2025, for the remainder of the season due to HPAI precautions*

**Jenny Island was closed December 16, 2024, for the remainder of the season due to HPAI precautions*

**Robert Point was closed December 2, 2024, for the remainder of the season due to HPAI precautions*

**Tay Head was closed January 27, 2025, for the remainder of the season due to HPAI precautions*

**Useful Island was closed December 4, 2024, for the remainder of the season due to HPAI precautions*