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Report on IAATO Operator Use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines, 2018-19 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 2018-2019 season. No non-IAATO visits are included in this analysis.

Additional information on IAATO operator activities can be found in *ATCM XLII IP140 IAATO Overview of Antarctic Tourism 2018-19 Season and Preliminary Estimates for 2019-20* 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). With the exception of the motor yacht *Betanzos*, all traditional commercial ship-borne tourism with landings to the Peninsula during the 2018-19 season was conducted by IAATO Operators, it is believed that this information is representative of actual activity levels.

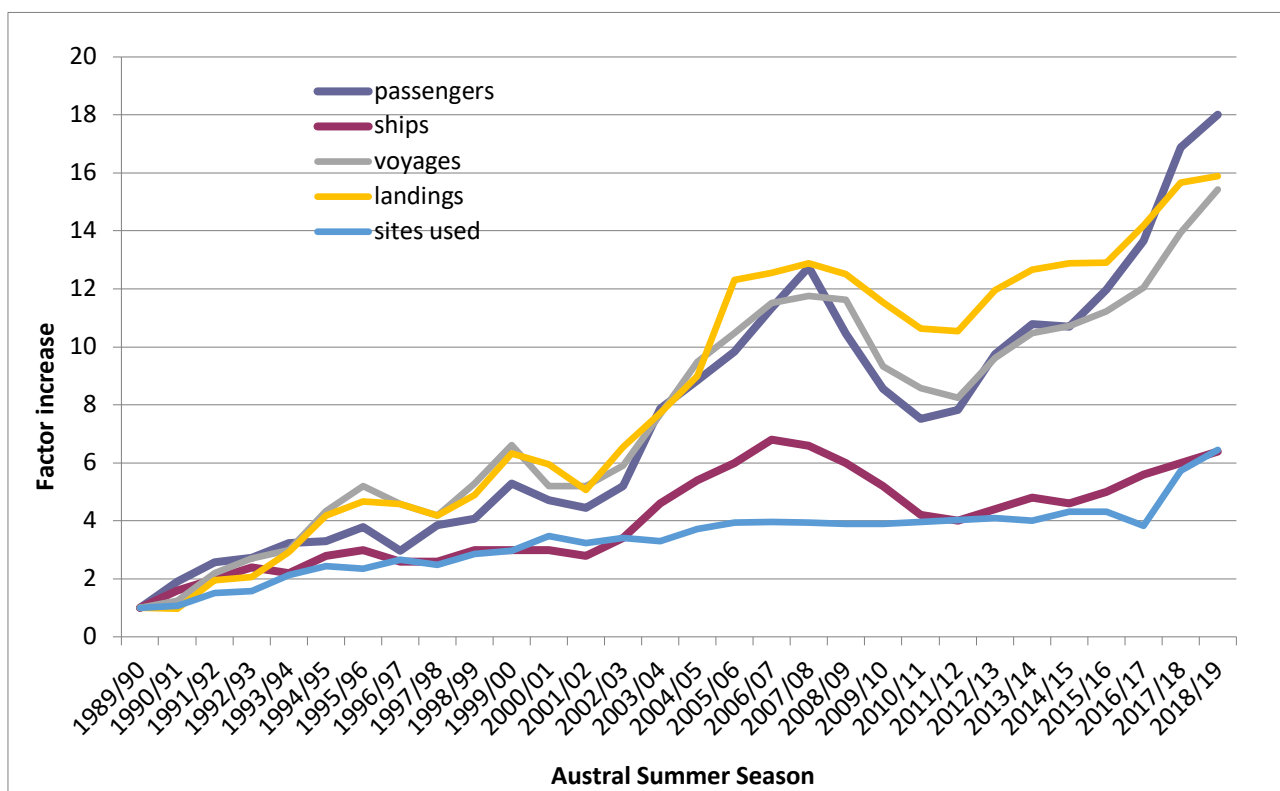


Figure 1: Factor Change in Traditional Landing Ship-borne Tourism in the Antarctic Peninsula 1989-2019.

Comparing the 2018-19 season with the previous peak season of 2017-18, the following trends are visible:

- The growth and recovery in the number of passengers taking part in traditional ship borne tourism to the Peninsula following the global recession has been steady since 2011-12, with the previous peak season 2007-08 total (31,352) surpassed by the 2016-17 season total (33,580). The 2018-19 total of passengers from ships making landings in the Antarctic Peninsula (44,303) has surpassed the previous 2017-18 season total (41,517). 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 32 SOLAS passenger vessels making landings in the Peninsula during the 2018-19 season. One new SOLAS vessels joined the IAATO fleet during the 2018-19 season – a return of the Icebreaker *Kapitan Khlebnikov*. This vessel Operated as IAATO Category 1 (13-200 passenger).

There has been an 10.5% increase in the number of voyages (from 293 during the 2017-18 season, to 324 during the 2018-19 season). 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 and the expansion into the early season with the return of the icebreaker *Kapitan Khlebnikov* season.

- There was a 1.4% increase in the number of actual landings made from last season (2,679 to 2,717). This number is lower than what might be consistent with the increase in voyages. Possible reasons for this is Operators responding to the discussions on managing for growth by moving away from simply making traditional landings but rather focusing on making the voyages a more holistic Antarctic experience thereby offering more non-landed activities like ship cruising, small boat cruising, kayaking, and ship cruising.
- There was a 12% increase in the number of landing sites used since last season (166 to 187). This is likely due to favourable ice conditions south of the Lemaire Channel and south of the Antarctic Circle in the later part of the 2018/19 season, as well as Operators seeking less frequented sites for alternative activities such as small boat cruising and kayaking.

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, Whalers Bay and Halfmoon Island) accounted for 28% 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 73% of the landings.

These percentages illustrate a focus 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 during the 2018-19 season. Landings occurred in the Antarctic Treaty Area from 11 October 2018 – 02 April 2019 (a total of 174 days). This increase in the number of days (up from 151 for the 2017/18 season) was, as noted above, largely due to the operation of the icebreaker *Kapitan Khlebnikov* making early season visits to the 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 41, while the lowest number in the same period was 16 landings (18 January). These peaks and troughs are remarkably similar to last season indicating that the increase in activity has been spread across the season rather than intensifying pressure during the peak season.

Additional tourism statistics will be made available on the IAATO website (<https://iaato.org/tourism-statistics>).

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 2018-19 season.

Conclusion

The information extracted from the ATCM Post Visit Reports shows that overall tourism levels have increased from the peak season of 2017-18, as highlighted in *ATCM XLII IP140 IAATO Overview of Antarctic Tourism 2018-19 Season and Preliminary Estimates for 2019-20* are likely to exceed these numbers during the 2019-20 season. The increase is not uniform however, with a few sites continuing to receive 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 other areas where increases have been observed (length of season and increase in number of sites used) are due to seasonal anomalies such as the use of an Icebreaker vessel early season and pack ice extent later in the season allowing visits to other areas.

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.

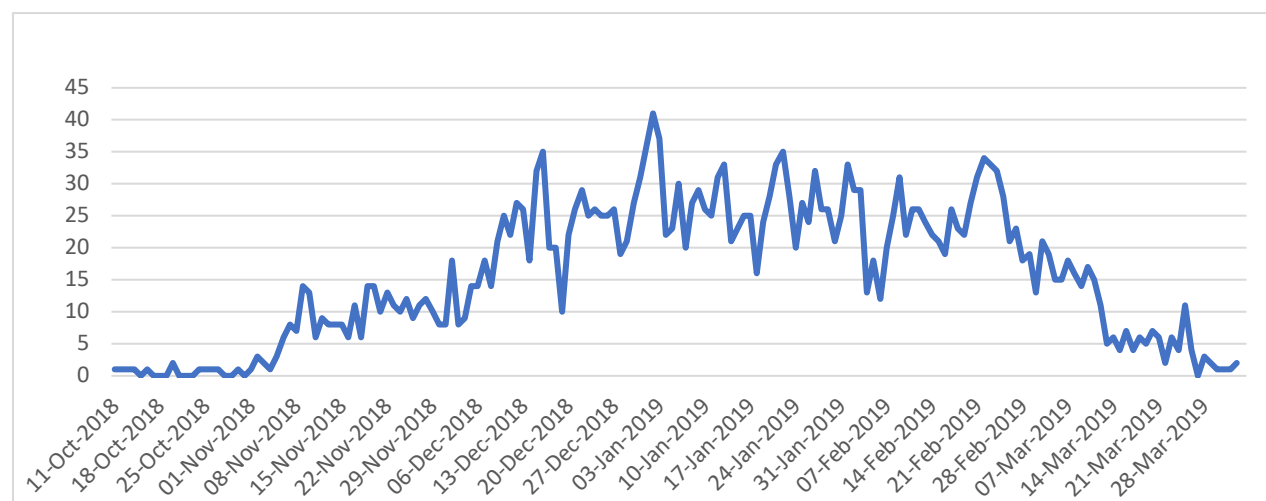
Appendices

- Appendix 1:** Top Twenty Most Visited Sites during the 2018-19 Season (including yacht visits).
- Appendix 2:** Appendix 2: Total number of IAATO Operator landings made per day on the Antarctic Peninsula during the 2018-19 season.
- Appendix 3:** Recorded Site Use at Sites during the 2018-19 season covered by ATCM Visitor Site Guidelines.

Appendix 1: Top Twenty Most Visited Sites during the 2018-19 Season (including yacht visits).

Rank	Landing Site	Number of Landed Visits	Number of Landed Tourists	Site Guidelines / National Programme Management
1	Goudier Island	172	18,048	ATCM Site Guidelines
2	Cuerverville Island	160	22,180	ATCM Site Guidelines
3	Neko Harbor	157	23,789	ATCM Site Guidelines
4	Whalers Bay	149	18,167	ATCM Site Guidelines
5	Half Moon Island	131	18,298	ATCM Site Guidelines
6	Brown Station	121	17,960	National Prog. Management
7	Danco Island	107	19,123	ATCM Site Guidelines
8	Jougla Point	95	7,041	ATCM Site Guidelines
9	Mikkelsen Harbor (D'Hainaut)	89	9,229	ATCM Site Guidelines
10	Damoy Point/Dorian Bay	84	12,698	ATCM Site Guidelines
11	Telefon Bay	71	11,259	ATCM Site Guidelines
12	Portal Point	63	8,249	ATCM Site Guidelines
13	Orne Harbor	58	7,910	ATCM Site Guidelines
14	Brown Bluff	56	8,375	ATCM Site Guidelines
15	Petermann Island	55	5,811	ATCM Site Guidelines
16	Yankee Harbor	53	6,658	ATCM Site Guidelines
17	Port Charcot	48	4,824	ATCM Site Guidelines
18	Waterboat Point/Gonzalez Videla Station	44	7,826	ATCM Site Guidelines
19	Aitcho Islands - Barrientos Island	42	5,895	ATCM Site Guidelines
20	Vernadsky Station	42	3,358	National Prog. Management

Appendix 2: Total number of IAATO Operator landings made per day on the Antarctic Peninsula during the 2018-19 season.



Appendix 3: Recorded Site Use at Sites during the 2018-19 season covered by ATCM Visitor Site Guidelines.

Landing Site	2018-19	
	Total Number of Landings	Number of days when maximum visit limitation was met
Ardley Island	4	0
Astrolabe Island	4	0
Baily Head	14	0
Barrientos (Aitcho) Island	42	3
Brown Bluff	56	0
Cape Denison	0	0
Cape Evans	3	0
Cape Hallett	0	0
Cape Royds	2	0
Cuerville Island	160	7
Damoy Point / Dorian Bay	84	1
Danco Island	107	4
Detaille Island	6	0
Devil Island	11	2
D'Hainaut (Mikkelsen Harbour)	89	1
George's Point (Ronge Island)	18	2
Goudier (Port Lockroy) Island	172	12
Halfmoon Island	131	3
Hannah Point & Walker Bay	18	18
Horseshoe Island	7	0
Jougla Point	95	2
Neko Harbour	157	0
Orne Harbour	58	0
Orne Islands	8	0
Paulet Island	29	4
Pendulum Cove	17	0
Penguin Island	11	0
Petermann Island	55	0
Pleneau Island	25	0
Point Wild	3	1
Portal Point	63	3
Port Charcot	48	4
Shingle Cove	2	0
Snow Hill Island, Nordenskjold's hut	6	6
Stonington Island	7	0
Taylor Valley / Canada Glacier	0	0
Telefon Bay	71	2
Torgersen Island	13	0
Turret Point	12	2
Whalers Bay	149	6
Wordie House	21	2
Yalour Islands	7	0
Yankee Harbour	53	2