A Five-Year Overview and 2020–21 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 2020–21 season. No non-IAATO visits are included in this analysis.

In addition to our annual data sets, building on discussions with different Treaty Parties around growth, we have included some historical data which may aid in future discussions around site usage.

It is important to note, due to the SARS CoV-2 pandemic, IAATO Operator expeditions during the 2020–21 season were limited to two individual expeditions on the Antarctic Peninsula, comprised of three yachts, and statistics for the 2020–21 season represent an irregularity. For this reason, most data sets in this paper review seasons 2015–20 for a more accurate statistical overview.

Additional information on IAATO operator activities can be found in *ATCM XLIII\_IPxx IAATO Overview of Antarctic Tourism: A Historical Review of Growth, the 2020–21 Season, and Preliminary Estimates for 2021–22,* and on the IAATO website <https://iaato.org/information-resources/data-statistics/>.

Historic Overview of Antarctic Peninsula traditional seaborne tourism

Antarctic tourism continues to be primarily focused on traditional commercial seaborne (SOLAS Vessels) tourism in the Antarctic Peninsula, which accounts for over 95% of all landed activity.

A SOLAS vessel (as defined in Maritime Rule Part 21) 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. In this paper’s number analysis, yacht (vessels carrying 12 passengers or less) numbers are only included where specifically mentioned.

***Figure 1:*** *Factor Change in Traditional Landing Ship-borne Tourism in the Antarctic Peninsula 1989*–*2021* provides a comparison of the factor increase in different aspects of this activity (number of passengers, ships, voyages, landings made and sites used).

**Figure 1:** Factor Change in Traditional Landing Ship-borne Tourism in the Antarctic Peninsula 1989–2021.

During the last representative season (2019–2020) all traditional commercial seaborne tourism with landings around the Peninsula was conducted by IAATO Operators. Whilst it is difficult to say when activities will return to pre-pandemic levels, planning and preparation for the resumption of activity and management for future growth continues as it has over the last 30 years. Table 1 shows the industry growth over the period 2015–2020, and potential number of passengers and voyages for 2021–22.

**Table 1**: Comparison between number landed passengers, voyages, landings, sites and SOLAS vessels on the Antarctic Peninsula for the past five years, 2015–2020, and potential number of passengers (including yachts) and voyages for 2021–22.

\*Based on IAATO Preliminary Estimates as of May 15, 2021

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Season** | **2015/16** | **2016/17** | **2017/18** | **2018/19** | **2019/20** | **2020/21** | **2021/22\*** |
| **Passengers** | 29493 | 33580 | 41517 | 44303 | 54485 | 15 | 51678 |
| **Voyages** | 236 | 253 | 293 | 324 | 367 | 2 | 429 |
| **Landings** | 2206 | 2427 | 2679 | 2717 | 3223 | 0 |  |
| **Sites** | 125 | 111 | 166 | 187 | 215 | 0 |  |
| **SOLAS Vessels** | 25 | 28 | 30 | 32 | 37 | 0 | 47\* |

* Since the 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 SOLAS vessels built after the Polar Code came into force in January 2017. The forecast increase is reflective of vessels which were planned and ordered between 2016–18 following the adoption of the Polar Code.
* Some new vessels scheduled for the 2020–21 season were delayed due to the pandemic. The potential increase for the 2021–22 season reflects the combination of vessels launched over the last two years.
* The continued growth in activity is driven by increased interest and awareness of Antarctica resulting in a desire by many of the public to experience the region first hand.
* The 2020–21 season of Antarctic tourist activites was effectively cancelled as a result of the SARS CoV-2 pandemic. How and when the industry will recover is yet to be seen, but the pandemic will continue to affect IAATO Operator activities for the 2021–22 season and possibly beyond. Ultimately, actual operation of vessels will not only depend on Antarctic Gateway protocols but worldwide travel restrictions and/or protocols.
* Should the season go ahead, the IAATO fleet would see a net increase by ten SOLAS vessels during the 2021–22 season (Appendix I) bringing the total number of vessels to 47. Appendix I details, by vessel name and type, which vessels are joining and leaving the IAATO fleet in the next two seasons should activities proceed.
* Prior to the pandemic, vessels were being operated with a higher percentage of capacity occupied, with all vessels benefiting from the world’s economic strength and operating at near-full passenger capacity.
* As new vessels are introduced into the IAATO fleet, the average vessel passenger capacity has increased, with many of the Category 1 vessels being added now carrying up to 200 passengers.
* Analysis of site use and activities (found in *ATCM XLIII\_IPxx IAATO Overview of Antarctic Tourism: A Historical Review of Growth, the 2020*–*21 Season, and Preliminary Estimates for 2021*–*22)* has found Operators are responding to IAATO’s multi layered strategy to encourage operators to spread activities across a range of platforms – ship cruising, Zodiac cruising, kayaking, etc. in order to reduce activities at landing sites. IAATO has encouraged this practice since 2012 and strengthened the effort during our 2019 Annual Meeting by incorporating into our Bylaws a new *Code of Conduct for Vessels*.

Specific Landing Site Use

The top five visited sites (Neko Harbour, Cuverville Island, Halfmoon Island - Chinstrap Colony, Whalers Bay and Goudier Island) have remained the same from 2015–2020. These sites account for approximately 25% of all landings made during the five-year period. The top twenty most-visited sites accounted for approximately 65% of all landings each season.

Appendix II lists the 20 most-visited sites in terms of landings made from 2015–2020

Figure 2 illustrates the total number of landings made per day at all sites within the Antarctic Peninsula over a five year period (2015–2020). Landings occurred over a period of approximately 160 days from October to March.

Gráfico, Gráfico de líneas

Descripción generada automáticamente

**Figure 2:** Total number of landings made per day at all sites within the Antarctic Peninsula over a five-year period (2015–2020).

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 considering the holiday season breaks.

Additional tourism statistics are available on the IAATO website: https://iaato.org/information-resources/data-statistics/

Use of ATCM Visitor Site Guidelines

Appendix III provides a five year analysis 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 tourism in the Antarctic Peninsula.

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 pandemic, the increase is not uniform across all visitor sites as demonstrated in Appendix II. A few sites continuing to prove very popular with a greater increase in activity, while some other sites actually 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 landing sites on the Peninsula are managed by ACTM Visitor Site Guidelines or through National Program Management guidelines.

It is important to note the 2021–22 season was greatly affected by the pandemic, and do not reflect recent tourism trends, as mentioned in Appendix IV.

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 I**: IAATO Category 1 and Category 2 Vessel withdrawals/additions between the 2019–20 and 2021–22 seasons

**Appendix II:** Top Twenty Most-Visited Sites between 2015–20 Seasons (including yacht visits)

**Appendix III:** Site visits per season covered by the ATCM Visitor Site Guidelines from 2015–20 season

**Appendix IV:** Site use covered by the ATCM Visitor Site Guidelines from 2020–21 season

**Appendix I: Projected IAATO Category 1 and Category 2 Vessel withdrawals/additions between 2019-20 and 2021-22 seasons.**

|  |  |
| --- | --- |
| **IAATO Cat 1 & 2 Vessels Additions** | **IAATO Cat 1 & 2 Vessels Withdrawn** |
| Crystal Endeavor – Category 1 | Akademik Shokalskiy – Category 1 |
| Fridtjof Nansen – Category 2 | Midnatsol – Category 2 |
| Hanseatic Spirit – Category 1 | National Geographic Orion – Category 1 |
| Janssonius – Category 1 | Ocean Endeavor\* – Category 1 |
| Le Commandant Charcot – Category 2 |  |
| National Geographic Endurance – Category 1 |  |
| National Geographic Resolution – Category 1 |  |
| Ocean Explorer – Category 1 |  |
| Ocean Victory - Category 1 |  |
| Seaventure\*– Category 1 |  |
| Ocean Explorer – Category 1 |  |
| Swan Hellenic Minerva – Category 1 |  |
| Sylvia Earle – Category 1 |  |
| Ultramarine – Category 1 |  |
| Viking Octanis – Category 2 |  |

\* Seaventure is formerly the Ocean Endeavour which did Operate during the 2019–20 season

**Appendix II:** Top Twenty Most-Visited Sites between 2015–20 Seasons (including yacht visits)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **2015/16** | **2016/17** | **2017/18** | **2018/19** | **2019/20** |
| **Goudier Island** | 150 | 149 | 159 | 174 | 131 |
| **Neko Harbor** | 135 | 116 | 142 | 157 | 191 |
| **Cuverville Island** | 134 | 159 | 151 | 160 | 173 |
| **Whalers Bay** | 134 | 154 | 134 | 149 | 147 |
| **Half Moon Island - Chinstrap Colony** | 112 | 130 | 139 | 131 | 155 |
| **Brown Station** | 84 | 83 | 97 | 122 | 90 |
| **Danco Island** | 77 | 70 | 90 | 107 | 112 |
| **Jougla Point** | 75 | 87 | 93 | 95 | 79 |
| **Petermann Island** | 74 | 64 | 95 | 55 | 107 |
| **Brown Bluff** | 72 | 75 | 65 | 56 | 90 |
| **Mikkelsen Harbor (D'Hainaut)** | 71 | 80 | 69 | 89 | 86 |
| **Damoy Point/Dorian Bay** | 61 | 71 | 79 | 86 | 95 |
| **Aitcho Islands - Barrientos Island** | 53 | 50 | 61 | 42 | 52 |
| **Portal Point** | 41 | 34 | 51 | 64 | 112 |
| **Vernadsky Station** | 38 | 42 | 52 | 45 | 55 |
| **Orne Harbor** | 35 | 53 | 53 | 58 | 76 |
| **Yankee Harbor** | 35 | 37 | 55 | 53 | 65 |
| **Pleneau Island** | 34 | 22 | 37 | 25 | 37 |
| **Telefon Bay** | 32 | 50 | 58 | 71 | 57 |
| **Port Charcot** | 30 | 31 | 70 | 50 | 80 |

**Graphical Depiction of Appendix II:** Top Twenty Most-Visited Sites between 2015–20 Seasons (including yacht visits)

**Appendix III:** Site visits per season covered by the ATCM Visitor Site Guidelines from 2015–20 season.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **2015/16** | **2016/17** | **2017/18** | **2018/19** | **2019/20** |
| Ardley Island | **4** | **6** | **6** | **4** | **11** |
| Astrolabe Island | **\*\*** | **\*\*** | **\*\*** | **4** | **9** |
| Baily Head | **19** | **14** | **14** | **14** | **18** |
| Barrientos (Aitcho) Island | **53** | **50** | **61** | **42** | **52** |
| Brown Bluff | **72** | **74** | **65** | **56** | **90** |
| Cape Denison | **0** | **0** | **1** | **0** | **0** |
| Cape Evans | **2** | **5** | **2** | **3** | **5** |
| Cape Hallett | **0** | **0** | **0** | **0** | **1** |
| Cape Royds | **2** | **3** | **2** | **2** | **4** |
| Cuverville Island | **134** | **158** | **151** | **160** | **173** |
| Damoy Point / Dorian Bay | **61** | **70** | **75** | **84** | **95** |
| Danco Island | **77** | **69** | **90** | **107** | **112** |
| Detaille Island | **16** | **17** | **19** | **6** | **20** |
| Devil Island | **9** | **8** | **4** | **11** | **15** |
| D'Hainaut (Mikkelsen Harbour) | **71** | **79** | **69** | **89** | **86** |
| George’s Point (Ronge Island) | **\*** | **\*** | **\*** | **18** | **28** |
| Goudier (Port Lockroy) Island | **150** | **143** | **159** | **172** | **131** |
| Halfmoon Island | **112** | **129** | **139** | **131** | **155** |
| Hannah Point & Walker Bay | **16** | **24** | **16** | **18** | **8** |
| Horseshoe Island | **6** | **6** | **4** | **7** | **14** |
| Jougla Point | **75** | **85** | **92** | **95** | **79** |
| Neko Harbour | **135** | **115** | **142** | **157** | **191** |
| Orne Harbour | **35** | **53** | **53** | **58** | **76** |
| Orne Islands | **9** | **12** | **8** | **8** | **22** |
| Paulet Island | **28** | **20** | **28** | **29** | **49** |
| Pendulum Cove | **9** | **15** | **14** | **17** | **26** |
| Penguin Island | **14** | **15** | **20** | **11** | **16** |
| Petermann Island | **74** | **63** | **94** | **55** | **107** |
| Pleneau Island | **34** | **21** | **36** | **25** | **37** |
| Point Wild | **\*\*** | **8** | **3** | **3** | **2** |
| Portal Point | **\*\*** | **28** | **71** | **63** | **112** |
| Port Charcot | **30** | **4** | **1** | **48** | **80** |
| Shingle Cove | **1** | **1** | **1** | **2** | **2** |
| Snow Hill Island, Nordenskjold’s hut | **1** | **2** | **8** | **6** | **2** |
| Stonington Island | **0** | **1** | **0** | **7** | **9** |
| Taylor Valley / Canada Glacier | **0** | **50** | **58** | **0** | **2** |
| Telefon Bay | **32** | **4** | **1** | **71** | **57** |
| Torgersen Island | **6** | **3** | **14** | **13** | **8** |
| Turret Point | **4** | **12** | **7** | **12** | **7** |
| Whalers Bay | **134** | **154** | **134** | **149** | **147** |
| Wordie House | **17** | **12** | **26** | **21** | **25** |
| Yalour Islands | **\*\*** | **10** | **17** | **7** | **22** |
| Yankee Harbour | **35** | **37** | **55** | **53** | **65** |

\*\* IAATO Guidelines in place / Not yet part of the ATCM Guideline Suite

**Appendix IV:** Site use covered by the ATCM Visitor Site Guidelines from 2020–21 season.

\*2020/21 IAATO Tourism Season consisted of three yachts, 15 total passengers on two individual expeditions.

|  |  |  |
| --- | --- | --- |
|  | **2020/21 Site Visits** | **2020/21 Passengers** |
| Ardley Island | **1** | **3** |
| Cuverville Island | **1** | **7** |
| Damoy Point / Dorian Bay | **1** | **3** |
| Goudier (Port Lockroy) Island | **1** | **6** |
| Paulet Island | **2** | **9** |
| Pendulum Cove | **1** | **6** |
| Penguin Island | **1** | **6** |
| Pleneau Island | **2** | **11** |
| Whalers Bay | **1** | **6** |
| Wordie House (Winter Island) | **1** | **4** |
| Yankee Harbour | **1** | **3** |