A Five-Year Overview and 2021–22 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 2021–22 season. No non-IAATO member visits are 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.

It is important to note, due to the SARS CoV-2 (COVID-19) pandemic, IAATO Operator expeditions during the 2020–21 season were limited to two individual expeditions on the Antarctic Peninsula. For this reason, data sets from the 2020-21 season have been excluded to provide a more representative overview of the statistics. The 2021-22 season was also truncated due to COVID-19.

Additional information on IAATO operator activities can be found in ATCM XLIV\_IP42 IAATO Overview of Antarctic Tourism: A Historical Review of Growth, the 2021–22 Season, and Preliminary Estimates for 2022–23*,* 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 LAS Vessel) 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. Yacht (vessels carrying 12 passengers or less) numbers are only included where specifically mentioned.

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).

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

IAATO Operator expeditions during the 2020–21 season were limited to two individual expeditions, and 15 clients on the Antarctic Peninsula. For this reason, data sets from the 2020-21 season have been excluded to provide a more representative overview of the statistics.

During the 2021-22 season all traditional commercial seaborne tourism with landings around the Peninsula was conducted by IAATO Operators. Table 1 provides a detailed summary of number of passengers, voyages, landings, sites and vessels over the past five seasons shows the industry growth over the period 2016–2021, and potential number of passengers and voyages for 2022–23.

***Table 1****: Comparison between number of landed passengers, voyages, landings, sites and SOLAS vessels on the Antarctic Peninsula for the past five years, 2016–2021, and potential number of passengers and voyages for 2022–23. Passenger data presented in Table 1 includes IAATO operated Yachts.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Season** | **2016/17** | **2017/18** | **2018/19** | **2019/20** | **2021/22** |
| **Passengers** | 33580 | 41517 | 44303 | 54485 | 22979 |
| **Voyages** | 253 | 293 | 324 | 367 | 235 |
| **Landings** | 2427 | 2679 | 2717 | 3223 | 1703 |
| **Sites** | 111 | 166 | 187 | 215 | 163 |
| **SOLAS Vessels** | 28 | 30 | 32 | 37 | 32 |

* Since the IMO’s
* 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 new SOLAS vessels launched after the Polar Code came into force in January 2017
* 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.
* Due to the COVID-19 pandemic some Operators took the difficult decision not to operate for the 2021-22 season early on and when Omicron became prevalent, others chose to cancel voyages or curtail their season.
* Prior to the COVID-19 pandemic, all vessels were benefiting from the world’s economic strength and operating at near-full passenger capacity.
* Operators saw fewer clients willing to travel during the 2021–22 season due to COVID-19 and therefore had lower occupancy.
* As new vessels are introduced into the IAATO fleet, the average passenger capacity per vessel 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 XLIV\_IP42 IAATO Overview of Antarctic Tourism: A Historical Review of Growth, the 2021–22 Season, and Preliminary Estimates for 2022–23) has shown Operators are responding to IAATO’s multi layered strategy to encourage them 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 it during our 2019 Annual Meeting by incorporating into our Bylaws a new Code of Conduct for Vessels.

Specific Landing Site Use for the 2021-22 season

The top five visited sites for the 2021-22 season were Cuverville Island, Neko Harbour, Whalers Bay, Danco Island and Halfmoon Island - Chinstrap Colony. These sites account for approximately 26% of all landings made during the season. The top twenty most-visited sites accounted for approximately 64% of all landings.

Appendix II lists the 20 most-visited sites in terms of landings made from 2016–2022

Figure 2 illustrates the total number of landings made per day at all sites within the Antarctic Peninsula over a five year period (2016–2021). During the 2021-22 season, landings occurred over a period of approximately 188 days from November to April. The 2020-21 season has been excluded due to the COVID-19 pandemic.

***Figure 2:*** *Cumulative number of landings made per day at all sites within the Antarctic Peninsula 2016–2021.*

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 revolving around holiday season timetables.

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 (2016-2022) of active seasons (2020-2021 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 ship-borne and yacht 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 COVID-19 pandemic, the increase is not uniform across all visitor sites as demonstrated in Appendix II. 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, 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 ATCM 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 by non-IAATO visitors.

Appendices

**Appendix I:** Top Twenty Most-Visited Sites between 2016–21 Seasons (including yacht visits)

**Appendix II:** Site visits per season covered by the ATCM Visitor Site Guidelines from 2016–21 season (including yacht visits)

**Appendix I:** Top Twenty Most-Visited Sites between the 2016-17 and 2021-22 seasons (including yacht visits), 2020-21 season excluded

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **2016/17** | **2017/18** | **2018/19** | **2019/20** | **2021/22** |
| **Goudier Island** | 149 | 159 | 174 | 131 | 32 |
| **Neko Harbor** | 116 | 142 | 157 | 191 | 93 |
| **Cuverville Island** | 159 | 151 | 160 | 173 | 123 |
| **Whalers Bay** | 154 | 134 | 149 | 147 | 85 |
| **Half Moon Island - Chinstrap Colony** | 130 | 139 | 131 | 155 | 78 |
| **Brown Station** | 83 | 97 | 122 | 90 | 39 |
| **Danco Island** | 70 | 90 | 107 | 112 | 79 |
| **Jougla Point** | 87 | 93 | 95 | 79 | 36 |
| **Petermann Island** | 64 | 95 | 55 | 107 | 42 |
| **Brown Bluff** | 75 | 65 | 56 | 90 | 68 |
| **Mikkelsen Harbor (D'Hainaut)** | 80 | 69 | 89 | 86 | 58 |
| **Damoy Point/Dorian Bay** | 71 | 79 | 86 | 95 | 69 |
| **Aitcho Islands - Barrientos Island** | 50 | 61 | 42 | 52 | 18 |
| **Portal Point** | 34 | 51 | 64 | 112 | 61 |
| **Vernadsky Station** | 42 | 52 | 45 | 55 | 0 |
| **Orne Harbor** | 53 | 53 | 58 | 76 | 49 |
| **Yankee Harbor** | 37 | 55 | 53 | 65 | 29 |
| **Pleneau Island** | 22 | 37 | 25 | 37 | 21 |
| **Telefon Bay** | 50 | 58 | 71 | 57 | 30 |
| **Port Charcot** | 31 | 70 | 50 | 80 | 32 |

**Graphical Depiction of Appendix I:** Top 20 Most-Visited Sites 2016–21 Seasons (including yacht visits)

**Appendix II:** Site visits per season covered by the ATCM Visitor Site Guidelines from 2016–21 season (including yacht visits), 2020-21 season excluded.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **2016/17** | **2017/18** | **2018/19** | **2019/20** | **2021/22** |
| Ardley Island | **6** | **6** | **4** | **11** | **11** |
| Astrolabe Island | **\*\*** | **\*\*** | **4** | **9** | **1** |
| Baily Head | **14** | **14** | **14** | **18** | **11** |
| Barrientos (Aitcho) Island | **50** | **61** | **42** | **52** | **18** |
| Brown Bluff | **74** | **65** | **56** | **90** | **68** |
| Cape Denison | **0** | **1** | **0** | **0** | **0** |
| Cape Evans | **5** | **2** | **3** | **5** | **1** |
| Cape Hallett | **0** | **0** | **0** | **1** | **0** |
| Cape Royds | **3** | **2** | **2** | **4** | **2** |
| Cuverville Island | **158** | **151** | **160** | **173** | **123** |
| Damoy Point / Dorian Bay | **70** | **75** | **84** | **95** | **69** |
| Danco Island | **69** | **90** | **107** | **112** | **79** |
| Detaille Island | **17** | **19** | **6** | **20** | **1** |
| Devil Island | **8** | **4** | **11** | **15** | **17** |
| D'Hainaut (Mikkelsen Harbour) | **79** | **69** | **89** | **86** | **58** |
| George’s Point (Ronge Island) | **\*\*** | **\*\*** | **18** | **28** | **7** |
| Goudier (Port Lockroy) Island | **143** | **159** | **172** | **131** | **32** |
| Halfmoon Island – Chinstrap Colony | **129** | **139** | **131** | **155** | **78** |
| Hannah Point & Walker Bay | **24** | **16** | **18** | **8** | **8** |
| Horseshoe Island | **6** | **4** | **7** | **14** | **9** |
| Jougla Point | **85** | **92** | **95** | **79** | **36** |
| Neko Harbour | **115** | **142** | **157** | **191** | **93** |
| Orne Harbour | **53** | **53** | **58** | **76** | **49** |
| Orne Islands | **12** | **8** | **8** | **22** | **14** |
| Paulet Island | **20** | **28** | **29** | **49** | **35** |
| Pendulum Cove | **15** | **14** | **17** | **26** | **9** |
| Penguin Island | **15** | **20** | **11** | **16** | **14** |
| Petermann Island | **63** | **94** | **55** | **107** | **42** |
| Pleneau Island | **21** | **36** | **25** | **37** | **21** |
| Point Wild | **8** | **3** | **3** | **2** | **2** |
| Portal Point | **28** | **71** | **63** | **112** | **61** |
| Port Charcot | **4** | **1** | **48** | **80** | **32** |
| Shingle Cove | **1** | **1** | **2** | **2** | **9** |
| Snow Hill Island, Nordenskjold’s hut | **2** | **8** | **6** | **2** | **7** |
| Stonington Island | **1** | **0** | **7** | **9** | **13** |
| Taylor Valley / Canada Glacier | **50** | **58** | **0** | **2** | **0** |
| Telefon Bay | **4** | **1** | **71** | **57** | **30** |
| Torgersen Island | **3** | **14** | **13** | **8** | **0** |
| Turret Point | **12** | **7** | **12** | **7** | **5** |
| Whalers Bay | **154** | **134** | **149** | **147** | **85** |
| Wordie House | **12** | **26** | **21** | **25** | **2** |
| Yalour Islands | **10** | **17** | **7** | **22** | **5** |
| Yankee Harbour | **37** | **55** | **53** | **65** | **29** |

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