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IAATO Deep Field and Air Overview of Antarctic Tourism: 2022-23 Season and Preliminary Estimates for 2023-24 Season

IAATO Overview of Deep Field and Air Tourism: A Historical Review of Growth, the 2022–23 Season, and Preliminary Estimates for 2023-24

**Information Paper Submitted by the
International Association of Antarctica Tour Operators (IAATO)**

Introduction

IAATO is pleased to provide the statistical data compiled from Deep Field and Air Operator Post Visit Reports for the 2022-23 season and the preliminary estimates for 2023-24 season as of 01 May, 2023.

We take this opportunity to build on discussions with different Treaty Parties around growth and diversification of Deep Field and Air activities, by including some historical perspective which may aid ongoing considerations. The data presented throughout this paper are based on information provided to IAATO by its Operators in Post Visit Reports. Visitor numbers reflect only those travelling with IAATO Operator companies and do not include Observers, Government Officials, or those individuals taking part in research projects that are being supported by Deep Field Operators. It does not include information from any non-IAATO operators, nor does it include information about IAATO Operator support of National Antarctic Programs (NAPs).

It should be noted at the outset that the worldwide SARS CoV-2 pandemic has had a significant impact on Antarctic private sector travel and consequently the numbers reported in this paper. Specifically, we draw attention to the fact that:

- During the 2020-2021 season, there were no IAATO Deep Field and Air Operations, although some National Antarctic Program Support was given by IAATO Operators, following COMNAP and NAP COVID-19 Protocols. As this was not a representative season for IAATO the 2020-2021 data has been omitted from overall deliberations in this paper.
- During the 2021-2022 season there was a resumption of activities however visitor numbers remained depressed.

IAATO's Deep Field and Air Operators encompass all of the private-sector tour operators. Operator activities are permitted or authorized through Environmental Impact Assessments, Advance Notifications and, where relevant, Waste Management Permits, and submitted in advance of the season.

All Deep Field and Air activities, that follow ATCM, COMNAP and IAATO policies and guidelines, have been authorised and conducted on expeditions since the 1990's. Regular deep field activities commenced towards the end of the 1980s, although there were exceptional one-off expeditions prior to this period, e.g. Transglobe Expedition (1980–81); In the Footsteps of Scott (1984–1987). IAATO Operators conduct their operations in a safe and environmentally responsible manner, and all activities are planned to have no more than a minor or transitory impact on the Antarctic environment.

1.0 IAATO Member Nationalities

Reflecting on the latest period of growth, the Post Visit Reports submitted to IAATO indicate the top 10 nationalities who visited Antarctica (vessel and deep field) have remained relatively consistent over the last ten seasons, although proportionately and prior to the pandemic, China had seen the greatest increase in travelers to Antarctica. During the 2023-24 season Chinese

visitors are expected to return in pre-pandemic numbers. An overview of the last 10 years can be found in *Figure 2*.

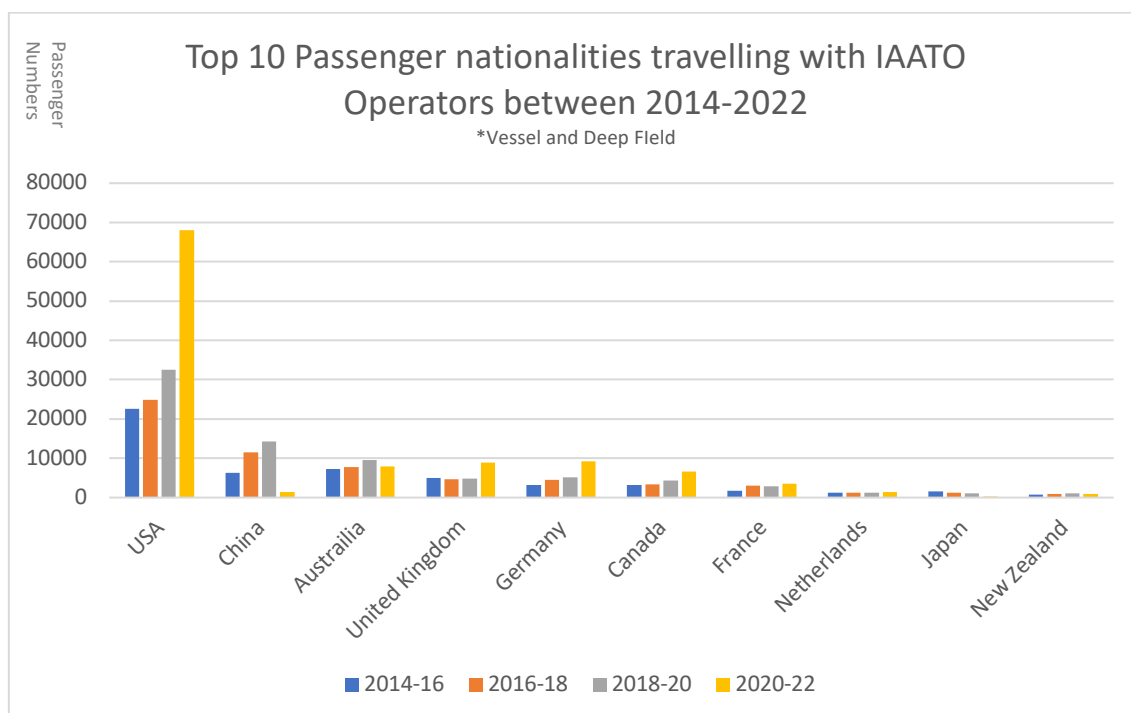


Figure 2: Top 10 Passenger nationalities (vessel and deep field) travelling with IAATO operators between 2014-2022

2.0 IAATO Deep Field and Air Operations Overview

This section focuses on IAATO Deep Field and Air Operations.

For IAATO Vessel Operator information please refer to ATCM XLV IP56 *IAATO Vessel Overview of Antarctic Tourism: 2022-23 Season and Preliminary Estimates for 2023-24 Season*.

2.1 IAATO Deep Field and Air Operators

IAATO members currently include four Operators who conduct deep field and air tourism activities, and one air Operator that supports air-cruise operations and single- or multi-day Antarctic experiences in the South Shetland Islands.

Table 2 provides an overview of Deep Field and Air Operators primary areas of seasonal operation/base camp. Deep Field Operators also utilise seasonal satellite field camps and runways for their different activities and flights. *Figure 3* provides a pictorial view of the areas of operation. *Figure 4* gives an overview of the deep field and air client numbers for the last decade. *Table 3* offers additional information about Deep Field and Air activities.

Table 2. IAATO Deep Field and Air Operators Main Camps and Main Area of Operation

Deep Field and Air Operators	Main Camp or Runway	Main Area of Operation	First Operational Year
Antarctic Logistics and Expeditions (ALE)	Union Glacier	West Antarctica to South Pole	1985
Arctic Trucks	Union Glacier and Dronning Maud Land	West Antarctica to Palmer Land to South and West Antarctica	1996
The Antarctic Company (TAC)*	Dronning Maud Land	Dronning Maud Land to South Pole	2004
White Desert (WDL)	Dronning Maud Land	Dronning Maud Land to South Pole	2006
DAP Antarctica	King George Island	King George Island	2003

*The Antarctic Company (TAC) is in the process of being incorporated as Ultima Expeditions. Ultima Expeditions was voted in as a Provisional Member at IAATO 2023, and will participate in the mandatory observer program during the 2023-24 season.

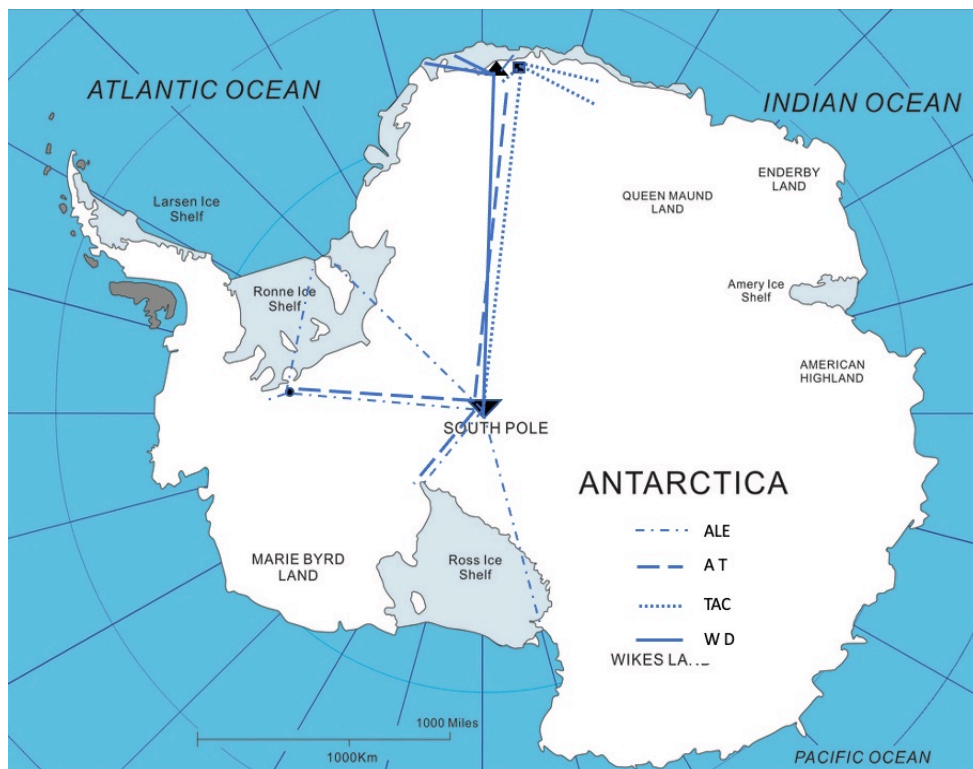


Figure 3: Deep Field and Air Areas of Operation

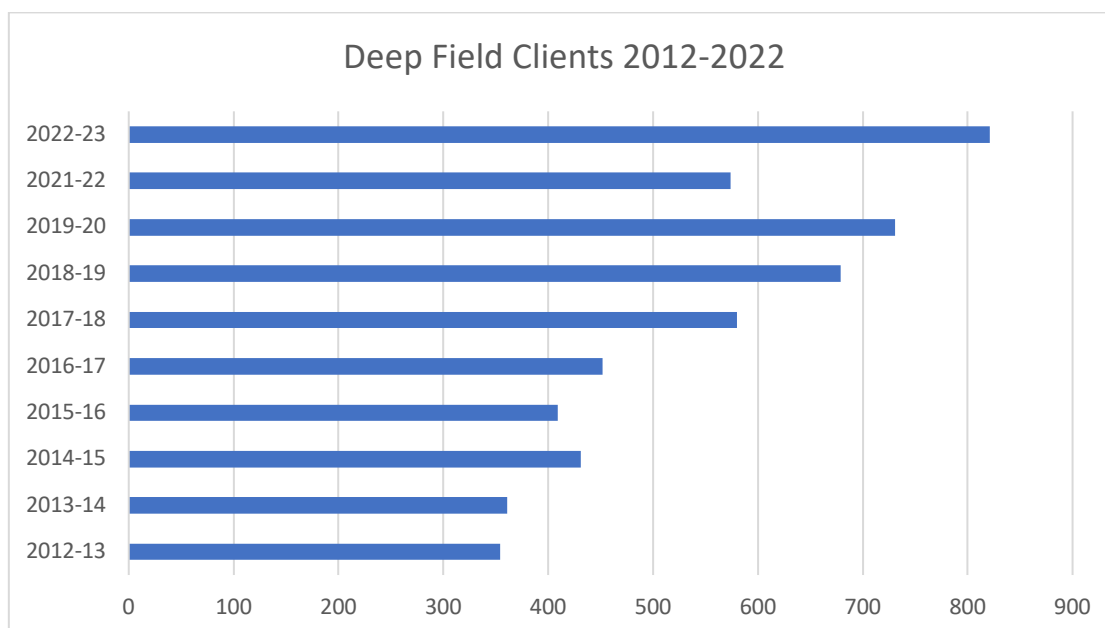


Figure 4: Deep Field and Air Operator Clients 2012-2022 (excluding 2020-21)

Deep Field and Air Operators usually maintain a higher client to staff ratio than is typical for seaborne tourism, often one guide to every three clients (1:3). The exception is solo expeditions, for example during South Pole Ski Expeditions, where the clients are supported remotely and closely monitored daily through communication protocols. All Deep Field and Air Operators prepare contingency plans for the health, safety, medical care and evacuation for their staff and clients to meet ATCM Resolutions 6 (2017) *Guidelines on Contingency Planning* and 6 (2021) *Air Safety in Antarctica*.

IAATO Air Operators comply fully with ATCM Measure 4 (2004) *Insurance and Contingency Planning for Tourism and Non-Governmental activities in the Antarctic Treaty Area* (updated by Resolution 6, 2017), and each Operators' air activities are planned to have the appropriate contingency in place to effect search and rescue and medical evacuation.

2.2 Deep Field and Air Operator Programs and Activities

The last five seasons' activities, including the operation of standard programs, the organization and operation of private expeditions, and logistical support of other expeditions, are outlined in *Table 3: Programs and Participant Numbers (clients) for 2017-22*. Total numbers participating include clients from all five IAATO Deep Field and Air Operators. Note that some clients participated in multiple programs. Most activities detailed below have been offered consistently since the 1990s and have not changed during this latest period of growth. Activities for air Operator DAP Antarctica are listed for seasons 2018-2022, reporting on their activities since becoming an IAATO Member.

*Table 3: Programs and Participant Numbers (clients) for 2016-21, excluding 2020–21
(Note: some participants may take part in several programs)*

Program	2017-18	2018-19	2019-20	2021-22	2022-23
Emperor Penguin Colony Visits	94	142	155	200	215
Deep Field Experiences (camping, skiing, kite-skiing, mountaineering, skydiving, cycling, etc.)	88	44	37	151	66
Deep Field Flights (e.g. to Pole of Inaccessibility)	0	17	0	0	2
South Pole Fly-in	100	172	217	116	173
South Pole Ski Expedition	18	18	21	6	23
South Pole Motorised Expedition	3	22	18	13	3
Last Degree Expedition	44	43	59	33	60
Antarctic Crossing (ski, kite-ski & motorised)	7	0	27	13	18
Vinson Massif	145	152	153	175	143
Marathon	124	120	108	57	124
Day Trips King George Island	-	112	123	6	68

3.0 Preliminary Estimate of Planned Activities for the 2023-24 Season

Preliminary estimates, found in Appendix 2, for the 2023-24 season are as of 01 May, 2023. These estimates represent the anticipated operating scenario for the 2023-24 season.

4.0 Tourism Statistics

In order to assist further with providing data on IAATO activities, the following data are publicly available through an access portal on the IAATO website

(<https://iaato.org/information-resources/data-statistics/visitor-statistics/>):

- Tourists by Nationality (Landed)
- Tourists by Nationality (Air and Cruise)
- Tourists by Nationality (All)
- Number of Vessel based Tourists per Site per Activity – Ross Sea Region
- Number of Vessel based Tourists per Site per Activity – Peninsula
- Number of Vessel based Tourists per Site per Activity – All Regions

Appendices:

- Appendix 1: Overview of Deep Field and Air Antarctic Tourism 2022-23 (As of May 01, 2023)
- Appendix 2: Preliminary Estimate of Deep Field and Air Antarctic Tourism 2023-24 (As of May 01, 2023)

Appendix 1: Overview of Deep Field and Air Antarctic Tourism 2022-23

Operator / Charterer	Competent Authority	Total # of clients
Antarctic Logistics and Expeditions	United States of America	430
Arctic Trucks	United Kingdom	3
DAP Antarctica	Chile	68
The Antarctic Company (TAC) (Pty.) Ltd.*	South Africa	73
White Desert Ltd	United Kingdom	247
	Totals:	821

*The Antarctic Company (TAC) is in the process of being incorporated as Ultima Expeditions. Ultima Expeditions was voted in as a Provisional Member at IAATO 2023, and will participate in the mandatory observer program during the 2023-24 season.

Appendix 2: Preliminary Estimate of Antarctic Tourism 2023-24 (As of May 01, 2023)

Operator / Charterer	Competent Authority	Total # of clients
Antarctic Logistics & Expeditions	United States of America	390
Arctic Trucks	United Kingdom	15
Ultima Expeditions (Previously TAC)	South Africa	82
White Desert Ltd	United Kingdom	230
	Totals:	717