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IAATO Deep Field and Air Operators' Overview of Antarctic Tourism: 2024- 25 Season and Preliminary Estimates for 2025-26 Season

IAATO Deep Field and Air Operators' Overview of Antarctic Tourism: 2024-25 Season and Preliminary Estimates for 2025-26 Season

***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 Operators' (DF&AO) Post Visit Reports for the 2024-25 season and the preliminary estimates for 2025-26 season as of 09 May 2025.

We take this opportunity to provide historical and current perspectives on discussions with various Treaty Party member representatives regarding the growth and diversification of DF&AO activities, which may inform ongoing considerations. The data presented throughout this paper is based on information provided to IAATO by its Deep Field and Air Operators in Post Visit Reports (PVRs). Visitor numbers reflect only those travelling with IAATO Operators and do not include observers, government officials, or individuals participating in research projects supported by Deep Field and Air Operators. It does not include information from any non-IAATO Operators, nor does it contain information about IAATO Operator support of National Antarctic Programs (NAPs).

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.

IAATO's DF&AO activities encompass private-sector flights (inter- and intra-continental), and overland activities by foot, kite, ski or vehicle. All IAATO DF&AO activities are permitted or authorised in advance of the season by National Competent Authorities through Environmental Impact Assessments, Advance Notifications and, where relevant, Waste Management Permits.

Commercial deep field and air activities for commercial tourism commenced towards the end of the 1980s, although there were exceptional one-off private expeditions before this period, e.g. Transglobe Expedition (1980–81); and In the Footsteps of Scott (1984–1987). DF&AO activities, as they are today, following ATCM, COMNAP and IAATO policies and guidelines, have been permitted or authorised for these expeditions since the 1990s. All IAATO Operators are committed to conducting 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 Deep Field and Air Operations Overview

This section focuses on IAATO Deep Field and Air Operators' activities.

For IAATO Vessel Operator information, please refer to ATCM 47 IP032 *IAATO Vessel Overview of Antarctic Tourism: 2024-25 Season and Preliminary Estimates for 2025-26 Season*.

1.1 IAATO Deep Field and Air Operators and areas of operation

IAATO membership currently includes 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. Additionally, at its 2025 annual meeting,

IAATO accepted a new air operator, Voyal, which expects to operate flights to Dundee Island, offering single- and/or multi-day Antarctic experiences.

Table 1 provides an overview of IAATO DF&AO primary areas of seasonal operation/main camp. Deep Field and Air Operators also utilise seasonal satellite field camps and runways for their different activities and flights.

Figure 1 provides a pictorial view of IAATO DF&AO areas of continental operation. *Figure 2* provides a pictorial view of IAATO Peninsula air operators area of operation. DF&AO site and/or expedition route information is submitted in advance of the season to Competent Authorities, and activities are reported in operator PVRs and/or through Competent Authority annual activity report requirements. *Figure 3* gives an overview of the IAATO DF&AO client numbers for the last decade.

Table 2 offers additional information about IAATO DF&AO's activities as well as a graphical representation of the table.

Table 1. IAATO Deep Field and Air Operators Main Camps and Main Area of Seasonal 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 (AT)	Union Glacier and Dronning Maud Land	West Antarctica to South Pole, Dronning Maud Land to South Pole	1996
Ultima Expeditions*	Dronning Maud Land	Dronning Maud Land to South Pole	2023
White Desert (WD)	Dronning Maud Land	Dronning Maud Land to South Pole	2006
DAP Antarctica	King George Island	King George Island	2003
Voyal**	Dundee Island	Dundee Island	2025

*Ultima Expeditions, previously The Antarctic Company (TAC), operating 2004-2020, is now a full IAATO Operator having completed their IAATO provisional operator observation during the 2024-25 season.

**Voyal is currently an IAATO Provisional Operator, with an advanced notification from Argentina. They will participate in the IAATO provisional observer program during the 2025-26 season.

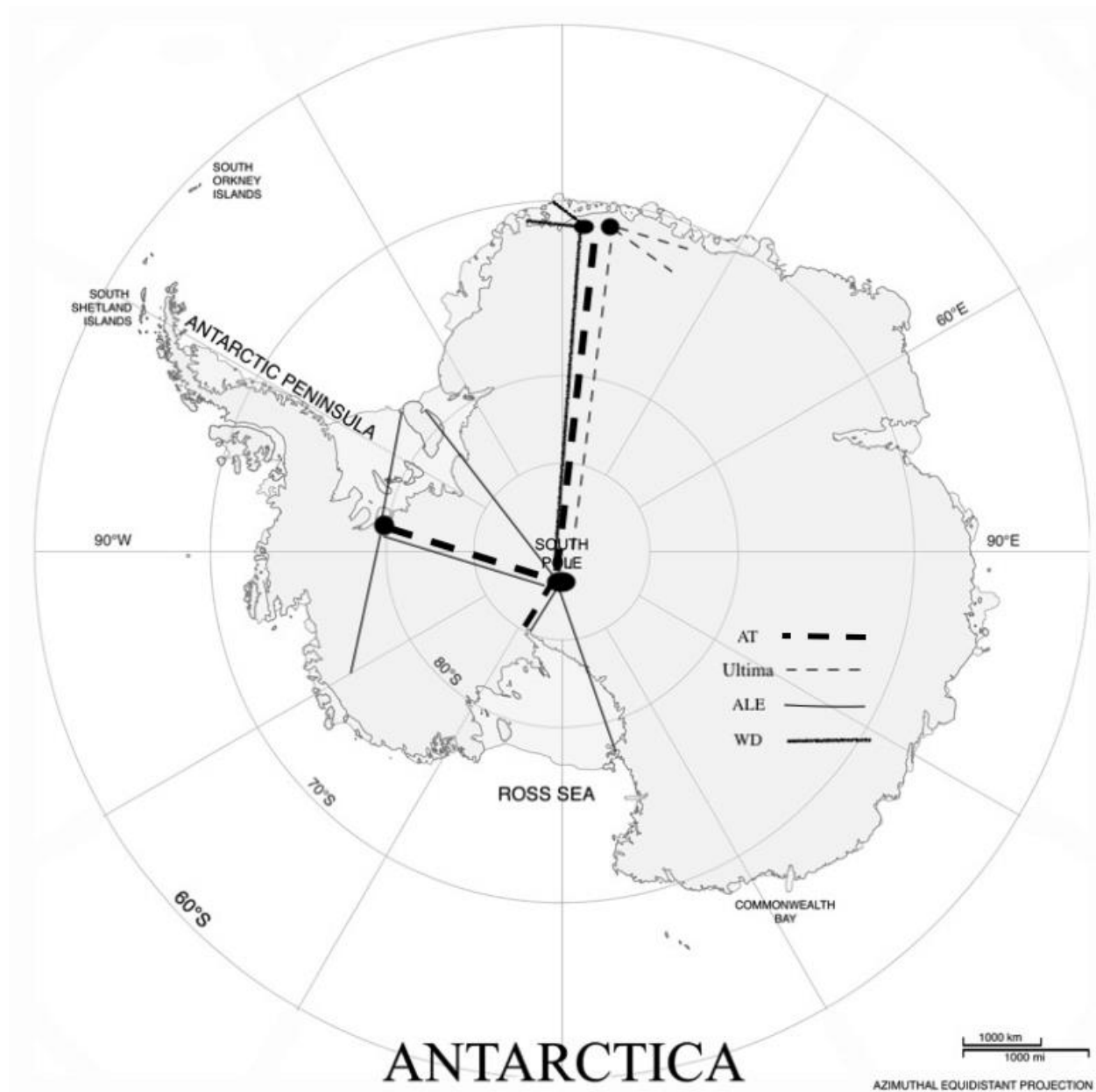


Figure 1: Deep Field and Air Primary Areas of Continental Operation

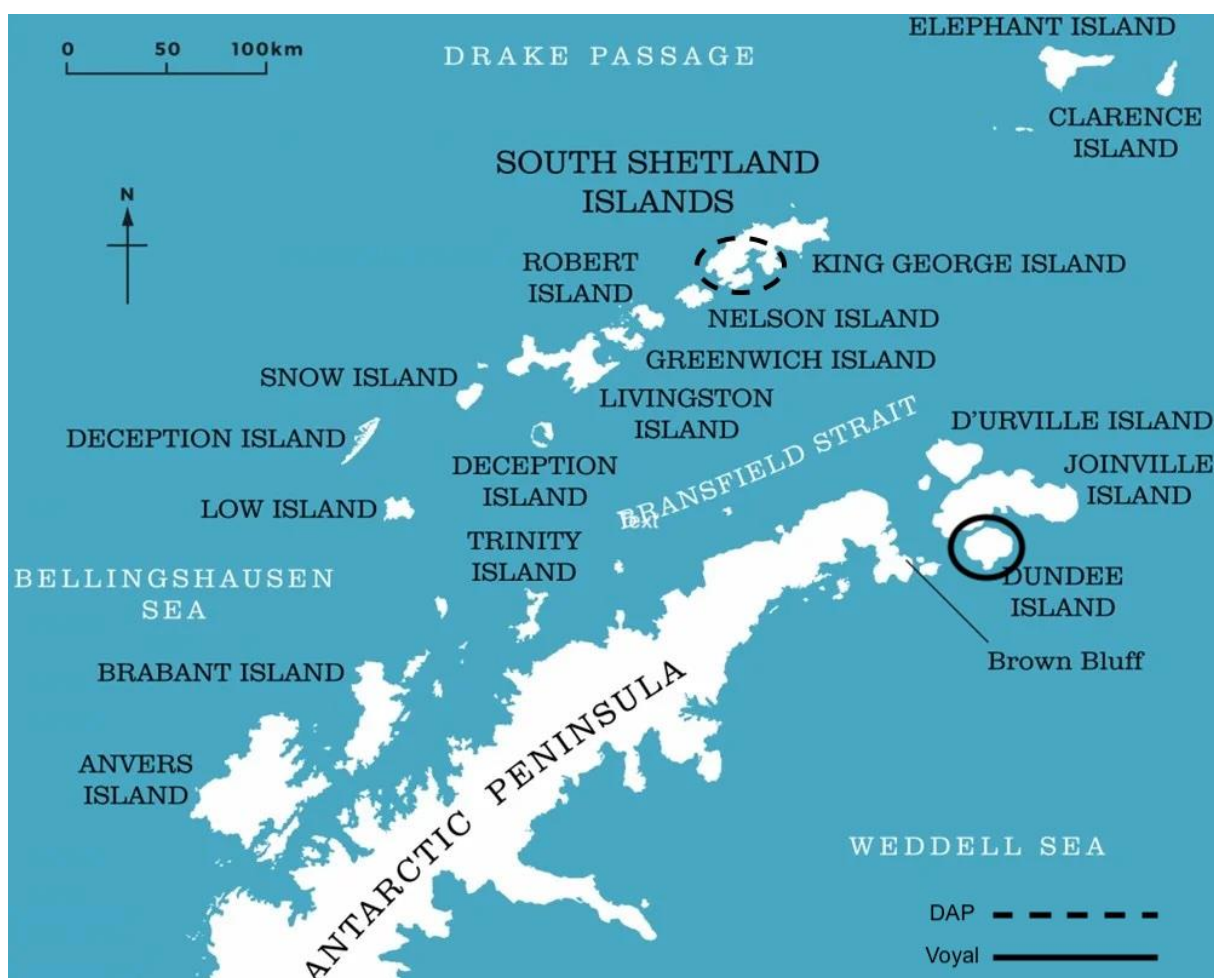


Figure 2: IAATO Peninsula Air Operators Primary Areas of Operation

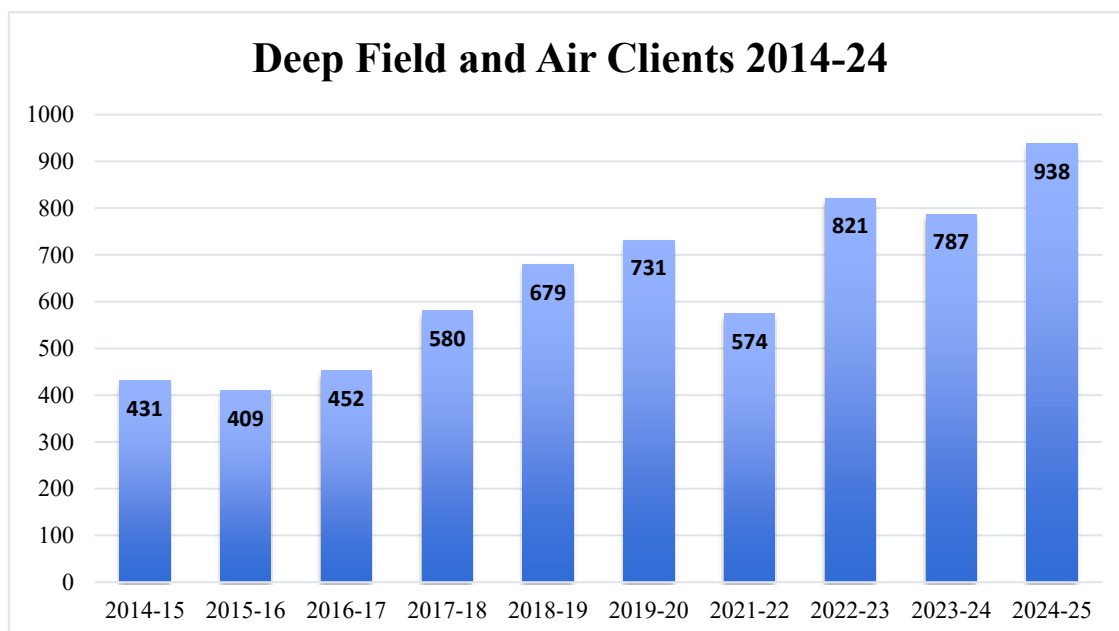


Figure 3: IAATO Deep Field and Air Operator Clients 2014-2024 (excluding 2020-21)

Deep Field and Air Operators account for roughly 1% of all visitors to Antarctica. DF&AO usually maintain a higher staff-to-client ratio than is typical for vessel-based 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 mandatory communication and medical reporting protocols. All DF&AO prepare contingency plans for the health, safety, medical care and evacuation for their staff and clients to meet ATCM Measure 4 (2004) *Insurance and Contingency Planning for Tourism and Non-Governmental Activities in the Antarctic Treaty Area*, Resolution 4 (2004) *Guidelines on Contingency Planning, Insurance and Other Matters for Tourist and Other Non-governmental Activities in the Antarctic Treaty Area*, Resolution 6 (2017) *Guidelines on Contingency Planning* and Resolution 3 (2022) *Air Safety in Antarctica*.

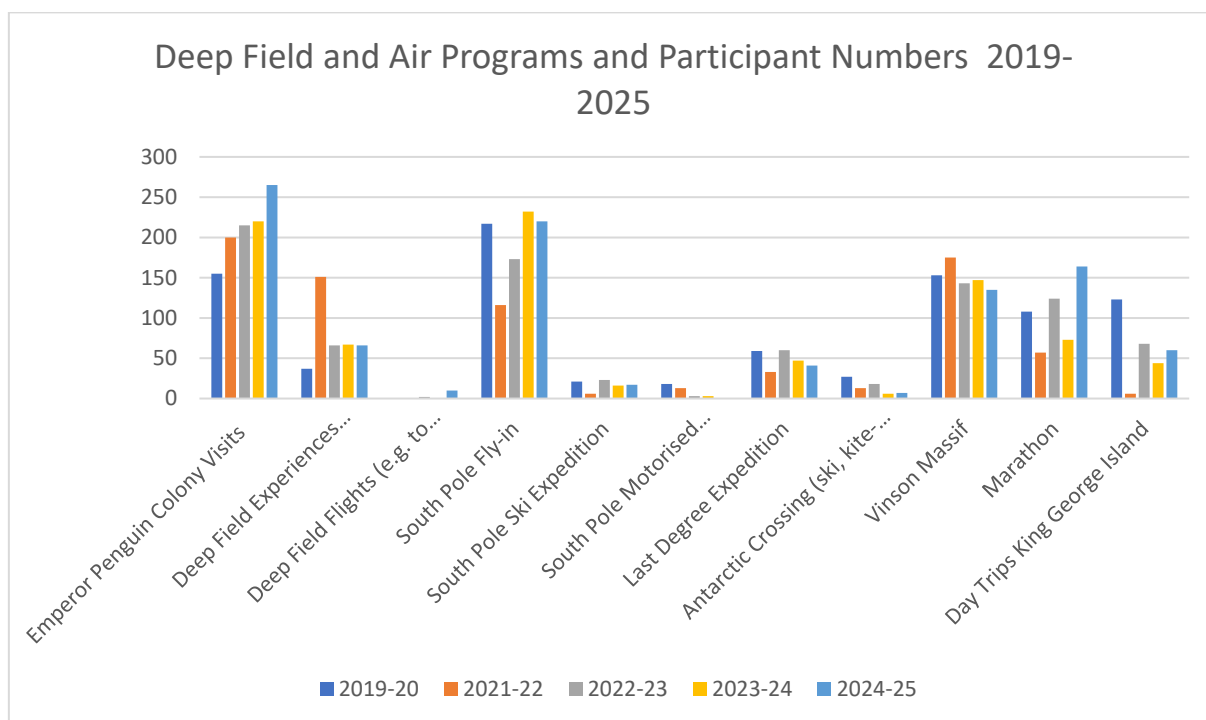
1.2 Deep Field and Air Operator Programs and Activities

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: *IAATO Programs and Participant Numbers (clients) for 2019-24*. The total number of participants includes clients from all five 2024-25 IAATO Deep Field and Air Operators (Voyal did not operate during the 2024-25 season). Note that some clients participated in multiple programs. Most activities detailed below have been consistently offered since the 1990s and have remained unchanged during this latest period of growth.

Table 2: *IAATO Programs and Participant Numbers (clients) for 2019-24, excluding 2020–21 (Note: some participants may take part in several programs)*

Program	2019-20	2021-22	2022-23	2023-24	2024-25
Emperor Penguin Colony Visits	155	200	215	220	265
Deep Field Experiences (camping, skiing, kite-skiing, mountaineering, skydiving, cycling, etc.)	37	151	66	67	66
Deep Field Flights (e.g. to Pole of Inaccessibility)	0	0	2	0	10
South Pole Fly-in	217	116	173	232	220
South Pole Ski Expedition	21	6	23	16	17
South Pole Vehicle Expedition	18	13	3	3	0
Last Degree Expedition	59	33	60	47	41
Antarctic Crossing (ski, kite-ski & vehicle)	27	13	18	6	7
Vinson Massif	153	175	143	147	135
Marathon	108	57	124	73	164
Day Trips King George Island	123	6	68	44	60

Graphical Depiction of Table 2: IAATO Programs and Participant Numbers (clients) for 2019-24, excluding 2020–21 (Note: some participants may take part in several programs)



2.0 Preliminary Estimate of Planned Activities for the 2024-25 Season

Preliminary estimates, found in Appendix 2, for the 2025-26 season are as of 06 May 2025. These estimates represent the anticipated operating scenario for the 2025-26 season. Currently, Voyal's projected 2025-26 client numbers are not included.

3.0 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>

Appendices:

- Appendix 1: Overview of Deep Field and Air Operators Antarctic Tourism 2024-25
- Appendix 2: Preliminary Estimate of Deep Field and Air Operators Antarctic Tourism 2024-25

Appendix 1: Overview of Deep Field and Air Operators Antarctic Tourism 2024-25

SUMMARY OF ACTUALS for 2024-25 SEASON

IAATO Members Deep-Field - 2024-25		
Operator / Charterer	Competent Authority	Total # of clients
Antarctic Logistics & Expeditions LLC	United States	373
Arctic Trucks	United Kingdom	6
DAP Antarctica	Chile	60
Ultima Antarctic Expeditions	South Africa	124
White Desert Ltd	United Kingdom	375
	Totals:	938

Appendix 2: Preliminary Estimates of Deep Field and Air Antarctic Tourism 2025-26

SUMMARY OF ESTIMATES for 2025-26 SEASON		
As of May 06, 2025		
IAATO Members Deep-Field - 2025-26		
Operator / Charterer	Competent Authority	Total # of clients
Antarctic Logistics & Expeditions LLC	United States	400
Arctic Trucks	United Kingdom	15
DAP Antarctica	Chile	132
Ultima Antarctic Expeditions	South Africa	320
White Desert Ltd	United Kingdom	400
Voyal	Argentina	TBD
	Totals:	1267