



ANTARCTIC TREATY
CONSULTATIVE MEETING

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Report of the International Association of Antarctica Tour Operators 2025-26

Attachments:

atcm48_att126.e.pdf: Attachment 1 - IAATO Five-Year Strategic Plan 2026 Update

atcm48_att127.e.pdf: Attachment 2 - New IAATO Vision Pillars 2026

atcm48_att128.e.pdf: Attachment 3 - IAATO Reducing Impact Guidance

atcm48_att129.e.pdf: Attachment 4 - IAATO Annual Report_PCF

ThirdPartyMarketing_2026

Report of the International Association of Antarctica Tour Operators 2025-26

Under Article III (2) of the Antarctic Treaty

Summary

This paper outlines the projects, collaborations and activities carried out by IAATO during the 2025-26 season in support of its mission to advocate for and promote safe and environmentally responsible private sector travel to Antarctica. It provides an overview of visitor statistics for the 2025-26 season and outcomes from IAATO's 2026 Annual Meeting. Additionally, it details activities related to research and conservation support—including the response to Highly Pathogenic Avian Influenza (HPAI)—and to the occurrence of incidents, as well as initiatives aimed at strengthening IAATO's institutional framework, such as its new vision pillars.

Introduction

The International Association of Antarctica Tour Operators (IAATO) is pleased to report its activities to ATCM 48.

IAATO focuses on activities that support its mission to advocate and promote the practice of safe and environmentally responsible private sector travel to Antarctica. Further information on IAATO, its mission, primary activities and recent developments can be found at:

www.iaato.org.

Overview

IAATO has been committed to promoting safe, environmentally responsible private-sector travel for the past three decades. This commitment has been unwavering through periods of major industry growth, the SARS-CoV-2 (COVID-19) pandemic and most recently, the emergence of Highly Pathogenic Avian Influenza (HPAI) in Antarctica.

IAATO's strength has been, and continues to be, its membership's ability to draw on their own experience and stakeholder advice to address emerging challenges and to evolve its procedures and management when necessary. IAATO's current membership totals 140 members, comprising 54 operators and provisional operators, and 86 associates.

The total number of visitors (Vessel and Deep Field) in the 2025-26 season was 113,518 (As of April 10, 2026). As projected in ATCM 47 (2025) IP032 rev 1 *IAATO Overview of Antarctic Vessel Tourism: The 2024-25 Season, and Preliminary Estimates for 2025-26*, the 2025-26 passenger levels are approximately 4.2% lower than the 2024-25 season. This can be attributed to fewer cruise-only operations during the 2025-26 season. The number of landed passengers increased approximately 6% from the 2024-25 season, from 80,455 to 85,195.

SUMMARY OF ACTUALS for 2025-2026 SEASON	
Types of Tourism	Total Numbers of Passengers
IAATO Seaborne Tourism	73,372
IAATO Air-Cruise Tourism	11,764
IAATO Yacht Tourism	59
IAATO Cruise-Only Tourism	27,217
IAATO Deep Field Tourism	1,106
Total clients across all tourism categories	113,518

Note 1: all numbers and company status are subject to change and are based on reports as of April 10, 2026

Note 2: The same vessel may be counted in multiple Categories

Further information on IAATO Operators' activities and nationalities can be found in ATCM 48 IPXXX *IAATO Vessel Overview of Antarctic Tourism: 2025-26 Season and Preliminary Estimates for 2026-27 Season*. ATCM 48 IPXXX *Deep Field and Air Overview of Antarctic Tourism: 2025-26 Season and Preliminary Estimates for 2026-27 Season*. ATCM 46 (2024) IP107 *A Catalogue of IAATO Operator Activities*. ATCM 48 IPXXX *IAATO Draft Operational Procedures for Shallow Water Freediving and Polar Plunging*.

Further information on IAATO tourism statistics focused on site usage and management can be found in ATCM 48 IPXXX *A Five-Year Overview and 2025–26 Season Report on IAATO Operator Use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines* and ATCM 46 (2024) IP108 *IAATO Site Management Methods*. The Membership Directory can be found at www.iaato.org.

IAATO Annual Meeting

IAATO's 2026 Annual Meeting was held in Annapolis, Maryland, USA (21-23 April 2026). IAATO was pleased to have Treaty Party member representatives from Australia, France, the Netherlands, the United Kingdom and the United States, as well as other valued stakeholders, including COMNAP and ASOC, attend both virtually and in person.

Actions at the annual meeting included:

- Review of IAATO's five-year strategy, Embracing Our Role as Stewards of Antarctica and the status of the 2025-26 Short Term Actions (See Attachment 1) and the approval of eight Short Term Actions for 2026-27. The eighth short-term action was added on the floor of the annual meeting and not included in the summary report. This eighth action is: Investigate paths to formally engage with ATCM and other Antarctic Stakeholders.
- Other 2026-27 short-term actions include:
 - Continue to support scientific projects that align with IAATO's mission and vision
 - Develop an Antarctic ambassadorship facilitators group through which to provide the latest program materials, shared learning and best practices
 - Strengthen Operator engagement in Antarctic Stewardship programs via new tools and continued outreach
- Review of the 2025-26 season results of IAATO initiatives, including:
 - 22 Mandatory/Provisional Operator Observations
 - 247 Site Stewardship Reports submitted from 31 Visitor Sites
 - 5450 Online Assessments taken
 - 13073 Marine mammal observations from the V-CaPS program
- Creation of a new voluntary geofenced whale area with a 10kt speed restriction around the South Orkney Islands

- Adoption of several new guidelines and infrastructure strengthening, including:
 - Eight new and updated IAATO Visitor Site Guidelines, which cover both terrestrial and marine locations (ref. ATCM 48 IPXXX *A Five-Year Overview and 2025–26 Season Report on IAATO Operator Use of Antarctic Peninsula Landing Sites and ATCM Visitor Site Guidelines*).
 - Two IAATO addendums to ATCM Visitor Site Guidelines have been put forward for acceptance at ATCM 48 by the United Kingdom (ATCM 48 WP035 *Proposed updates of two Visitor Site Guidelines*)
- Elevation of the Cruise-Only Working Group to Committee level and successful Integration of several Subcommittees: Field Staff, Helicopter, Medical, Submersible and Air-Cruise (IAATO now has 12 committees, four working groups and five subcommittees.) See Appendix 1 for a list of IAATO Committees, Subcommittees and Working Groups
- Launch of the New IAATO Antarctic Expedition App (ref. ATCM 48 IPXXX *Workshop on Education - IAATO Education, Outreach and Ambassadorship – Strategic Overview*)
- IAATO members progressed work to evolve its current climate pledge into a more structured framework, building on recent advances, including IAATO’s annual greenhouse gas inventory and member climate action surveys. This work will continue over the coming year, with a focus on supporting emissions reductions, while remaining responsive to the availability of low- or zero-emission fuels and relevant technological, industry, and regulatory developments.
- IAATO has adopted new strategic vision pillars (See Attachment 2) that highlight our membership’s shared responsibility to protect and engage responsibly with Antarctica. These pillars not only reflect our ongoing purpose but also mark a clear step forward in how we operate, collaborate, and lead. They are characterised by the following commitments to:
 - Uphold the Antarctic Treaty System and relevant international conventions
 - Ensure all activities have no more than a minor or transitory environmental impact
 - Strengthen safety, logistics, and environmental practices
 - Commit to continuous improvement, closer collaboration, and updated tools and procedures
 - Apply best practices across Antarctic tourism and build expertise for unique challenges
 - Foster a community grounded in trust, openness, and accountability
 - Share IAATO’s mission widely and build a global network dedicated to protecting Antarctica
 - Maintain position as a leading authority on responsible Antarctic tourism
 - Engage external audiences with clear, transparent communication
 - Respond proactively to evolving global discussions about Antarctica
 - Lead by example with ethical conduct and strict adherence to rules
 - Ensure accountability through robust self-management and responsible actions
 - Back critical research and incorporate new knowledge
 - Expand educational programs to promote informed decision-making worldwide

Treaty Party member representatives are cordially invited to join any of the open sessions during IAATO’s future annual meetings. IAATO’s 2027 Annual Meeting will be held in Prague, Czech Republic, April 20-22, 2027.

HPAI Response

The further spread of HPAI in Antarctica, particularly in the Antarctic Peninsula region, remains a great concern. Prior to and during the 2025-26 season, the collaboration among IAATO, SCAR, COMNAP and CCAMLR continued regarding the enhancement of protocols

related to HPAI, including considerations for working with scientists and a reporting process for suspected cases to SCAR. See also ATCM 47 WP050 *Update on High Pathogenicity Avian Influenza in Antarctica* and ATCM 47 IP035 *2024-25 Update IAATO Marine Operator High Pathogenicity Avian Influenza Response*.

For IAATO Operators, enhanced biosecurity, pre-landing assessments, and HPAI operational procedures remained core to their operations throughout the 2025-26 season. Internal communication between IAATO, its operators and other stakeholders on the Antarctic Peninsula and in the Ross Sea also remained strong.

Lessons learned from the 2025-26 season, considerations for our industry's evolution, and action points for the upcoming season were discussed at IAATO's Annual Meeting in Annapolis, Maryland, USA (21-23 April 2026). IAATO and its operators also continued to support scientific efforts to gather more information on HPAI, with financial, data and logistics support.

IAATO Support of Research & Conservation

IAATO encourages collaborative opportunities with scientific organisations, particularly where these enhance the Antarctic community's understanding of human activities in the region.

Projects include(d):

- **IAATO/COMNAP Fellowships:** IAATO, in collaboration with COMNAP, will continue to invest in the development of early-career researchers by awarding its eighth US\$15,000 Fellowship in 2026. Eleven early-career persons have received funding since the award was launched. Suitable candidates are encouraged to apply by June 14, 2026. In 2025, IAATO awarded its fellowship to Dr Manuel Novillo from the Argentine Museum of Natural Sciences. He will be hosted by the Institute of Polar Sciences and the Institute for Marine Biological Resources and Biotechnology, Italy.
- **Reducing Your Impact: A Practical Guide for Antarctic Visitors:** IAATO has comprehensively updated its 'Reducing Waste Guidance' to address emerging priorities alongside traditional plastic and waste reduction. The enhanced recommendations cover microplastic pollution, grey water impacts, greenhouse gas emissions, and energy and water conservation, while providing visitors with practical actions that extend environmental stewardship beyond their Antarctic experience (See Attachment 3).
- **Tourism Research Projects:** IAATO continues to collaborate with stakeholders on tourism-related research, including programs under SCAR, projects funded through the Dutch Research Council, Proactive Management of Antarctic Tourism (ProAct) and Antarctic tourism - Research Programme on Assessment of Impacts and Responses (PT-REPAIR), and the University of Tasmania.
- **Support in Antarctica:** IAATO Operator expeditions during the 2025-26 season provided broad support for various scientific projects, including, but not limited to, the Antarctic Site Inventory/Oceanites, ORCA, and Penguin Watch. Many IAATO Operators also provided logistical field support by air, overland traverse or vessel to National Antarctic Programs.

Other Work and Activities

IAATO also continues to prioritise activities that strengthen its institutional structure and help position it as a reputable, valued partner in the wider polar community. In addition to the work described above, over the past year, IAATO has:

- Hosted eight webinars, covering 15 topics, for field staff prior to the 2025-26 season to discuss best practices and lessons learned. These webinars were recorded and made available for field staff who were unable to attend the live session or wanted a refresher during the season. The recorded webinars are part of an education library available for field staff and operators. This practice will continue for the 2026-27 season.
- Hosted a joint Polar Field Staff Conference with the Association of Arctic Expedition Cruise Operators (AECO) in Lisbon, Portugal, March 23-26, 2026.

- Continued to expand its Polar Communicators Forum. The forum supports responsible polar communications, from influencer engagement and storytelling to establishing standards for the appropriate use of imagery. During 2025-26, IAATO hosted three online sessions focused on best practices and the development of new resources to support responsible polar communications. Members also collaborated to produce guidance for third-party sales and marketing professionals, helping ensure consistent standards across the industry - even among those without specialist Antarctic expertise (see Attachment 4).

In addition to ATCM Intersessional work, IAATO Secretariat staff and operator representatives participated in internal and external meetings, liaising with Treaty Party representatives, National Antarctic Program personnel, and governmental, scientific, environmental, and industry organizations, including but not limited to:

- COMNAP Annual Meeting, August 2025
- AECO Conference & Annual Meeting, October 2025
- CCAMLR, October 2025
- IHO-HCA, December 2025

Tourism Incidents 2025-26

IAATO's policy is to disclose major incidents to ensure risks are understood and appropriate lessons are learned for all Antarctic operators. Two IAATO Operators experienced shore-stranding events at Turret Point, South Shetland Islands, and Maxwell Bay, King George Island, respectively. In line with Measure 4 (2004), both IAATO Operators were self-sufficient with no external national assistance needed.

IAATO is committed to immediately reviewing all incidents, sharing lessons learned and taking appropriate actions to update operational procedures as needed. After these incidents, our Marine Committee and Field Operations Committee reviewed and updated the *IAATO Guidance on Shore Stranding Equipment for Vessel Operations*, as presented and accepted at the 2026 IAATO Annual Meeting.

Additionally, IAATO continues to value the collaboration with COMNAP, in particular the triennial SAR Workshop, where all Antarctic stakeholders can work towards shared goals and lessons around incident management. The next COMNAP SAR Workshop will be in August 2026 in Tromsø, Norway.

With Thanks

IAATO appreciates the opportunity to work cooperatively with Antarctic Treaty Parties, CCAMLR, COMNAP, SCAR, ASOC, IHO/HCA, WMO and others toward the long-term protection of Antarctica.

Appendices:

Appendix 1: IAATO Committees, Working Groups and Subcommittees 2026-27

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Committees	
Executive Committee	The Executive Committee (EC) plays a key role in collaborating with our executive director (ED) to establish IAATO's policy direction and address important issues.
Bylaws Committee	The Bylaws Committee is tasked with maintaining IAATO's bylaws and various TORs, ensuring they align with the strategic plan and accurately reflect the association's current operating practices.
Compliance Dispute and Resolution Committee (CDRC)	The Compliance and Dispute Resolution Committee (CDRC) is responsible for addressing any issues presented to it in accordance with the established Rules of Procedure for Compliance.
Membership Committee	The Membership Committee is tasked with reviewing all membership applications and plays a central role in evaluating reports from the Mandatory Observer Scheme.
Antarctic Ambassadorship Committee	The Antarctic Ambassadorship Committee (AAC) focuses on identifying opportunities for development and best practices in education, outreach, training, and promotion for IAATO's core audiences.
Gateway Committee	The Antarctic Gateway Committee (AGC) collaborates to create a strategy for IAATO that promotes sustainable, viable, efficient, and environmentally responsible operations at Antarctic gateways, as seeks close collaboration with gateway stakeholders on mutual areas of interest.
Climate Change Committee	The Climate Change Committee (CCC) oversees IAATO's initiatives to understand and reduce emissions. This includes reviewing progress related to the IAATO Pledge, and offering guidance on decarbonisation, sustainability, best practice and related goals.
Cruise Only Committee	The Cruise Only Committee discusses operational considerations, protocols, and materials relevant to operators offering cruise-only operations.
Deep Field and Air Operations	The Deep Field and Air Operations (DFAO) Committee provides advice to the secretariat regarding the specific aspects and management of deep field or air-specific tourism in Antarctica.
Field Operations Committee	The Field Operations Committee (FOC) supports the management of field operations. This includes creating, updating and reviewing site guidelines for both Antarctic Treaty System (ATS) and IAATO Guidelines, as well as addressing other matters related to field operations and field staff.
Marine Committee	The Marine Committee is essential for identifying and advising operators on marine related issues that require attention.
Yacht Committee	The Yacht Committee is responsible for identifying yacht-related issues that need further attention, particularly those that intersect with other IAATO committees where IAATO Yacht Operators possess relevant expertise.

Subcommittees	
Field Staff Subcommittee	The Field Staff Subcommittee operates under the direction of the Field Operations Committee (FOC). Its objective is to discuss operational considerations, protocols, and tools from the perspective of those active in the field, enhancing practical application scenarios.
Medical Subcommittee	The Medical Subcommittee operates under the Marine Committee and provides a platform for medical and paramedical staff to share experiences and offer suggestions regarding best practices in remote healthcare during Antarctic expeditions.
Air Cruise Subcommittee	The Peninsula Air-Cruise Sub-committee (PACSC) operates under the Gateway Committee and offers a platform for sharing information and best practices among members involved in air-cruise operations in the Antarctic Peninsula area.
Helicopter Subcommittee	The Helicopter Subcommittee operates under the Field Operations Committee and establishes guidelines, coordinates helicopter activities within IAATO, and provides essential safety and logistics information to Antarctic Treaty Parties and National Antarctic Programs.
Submersible Subcommittee	The Submersible Subcommittee operates under the Marine Committee and provides a forum for IAATO Submersible Operators to share their expertise, opinions and best practices.

Working Groups	
Emperor Penguin Working Group	The Emperor Penguin Working Group works with IAATO Members and Antarctic stakeholders, including the research community, to review and strengthen guidance on activities in the vicinity of emperor penguins.
Managing for Growth Working Group	The Managing for Growth Working Group (M4GWG) analyses new or emerging needs of the organization, focusing on applying working group members' expertise to create guidance or proposals for the organization to proactively respond to a growing membership.
Ross Sea Working Group	The Ross Sea Working Group works with operators and other Ross Sea stakeholders to strengthen guidance and safety for the Ross Sea Region.
Science Support Working Group	The Science Support working group (SSWG) serves as a platform to discuss all aspects of science and research related to IAATO's mission, encouraging the sharing of best practices and lessons learned.