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IAATO Operator Use of Antarctic Peninsula Landing Sites, Including ATCM and IAATO Site Guidelines: 2025-26 Season Report and Five-Year Overview

Attachments:

atcm48_att146.e.pdf: Attachment 1 - IAATO Addendum Damoy Point Site Guidelines
 atcm48_att147.e.pdf: Attachment 2 - IAATO Addendum Detaille Island Site Guidelines
 atcm48_att148.e.pdf: Attachment 3 - IAATO Edinburgh Hill Site Guidelines
 atcm48_att149.e.pdf: Attachment 4 - IAATO False Island Point Site Guidelines
 atcm48_att150.e.pdf: Attachment 5 - IAATO Fish Islands Site Guidelines
 atcm48_att151.e.pdf: Attachment 6 - IAATO Hall Peninsula Site Guidelines
 atcm48_att152.e.pdf: Attachment 7 - IAATO Kayak Bay (Marine Only) Site Guidelines
 atcm48_att153.e.pdf: Attachment 8 - IAATO Recess Cove Site Guidelines
 atcm48_att154.e.pdf: Attachment 9 - IAATO View Point Site Guidelines
 atcm48_att155.e.pdf: Attachment 10 - IAATO Walker Bay Site Guidelines

IAATO Operator Use of Antarctic Peninsula Landing Sites, Including ATCM and IAATO Site Guidelines: 2025-26 Season Report and Five-Year Overview

Information Paper submitted by IAATO

Summary

This information paper presents data collected by IAATO from IAATO Vessel Operator Post Visit Report Forms for the Antarctic during the 2025-26 season (As of April 10, 2026). It also includes historical data, which may aid future discussions on site usage and management, building on discussions among different Antarctic Treaty Parties on tourism growth in the region.

Introduction

IAATO has an ongoing commitment to reporting to the CEP and ATCM on the use of IAATO Landing Site and ATCM Visitor Site Guidelines. This information paper presents data collected by IAATO from IAATO Vessel Operator submitted Post Visit Report Forms (PVRs) for the Antarctic during the 2025-26 season (As of April 10, 2026). Visits by non-IAATO members are not included in this analysis.

In addition to our annual data sets, building on discussions with various Antarctic Treaty Parties on growth, we have included some historical data that may aid future discussions on site usage and management.

Additional information on IAATO vessel operator activities can be found in ATCM 48 IPXXX *IAATO Vessel Overview of Antarctic Tourism: 2025-26 Season and Preliminary Estimates for 2026-27 Season*. Additional information on IAATO Site Management techniques can be found in ATCM 46 (2024) IP108 *IAATO Site Management Methods*.

Historic Overview of Antarctic Peninsula Traditional Seaborne Tourism

IAATO Operator visitors constitute 98% of all Antarctic tourism. Antarctic tourism continues to be primarily focused on traditional commercial seaborne (SOLAS Vessel) tourism in the Antarctic Peninsula, which accounts for over 95% of all landed activity.

A SOLAS vessel 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. Data from yachts (vessels carrying 12 passengers or fewer) is included only when specifically mentioned. Cruise-only vessels are not included in any of the data represented, as they do not operate landings.

Figure 1 presents a comparison of changes in various aspects of traditional commercial seaborne tourism since 1989, including the number of passengers, ships, voyages, landings, and sites used.

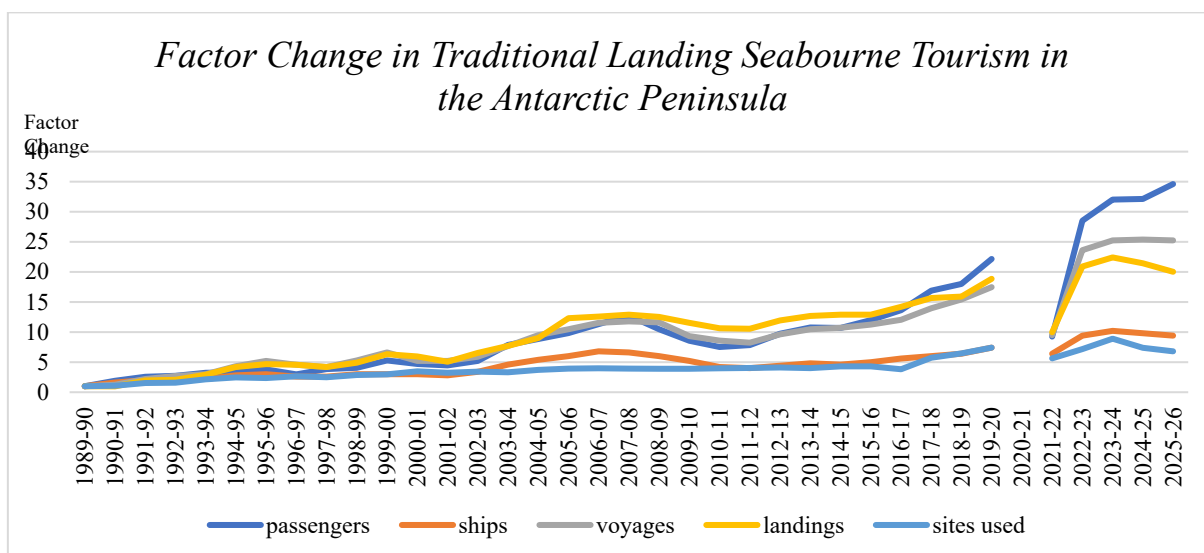


Figure 1: Factor Change in Traditional Landing Seabourne Tourism in the Antarctic Peninsula 1989 to Present

During the 2025-26 season, 100% of all seaborne tourism with landings around the Peninsula was conducted by IAATO Operators. Table 1 provides a detailed summary of the number of passengers, voyages, landings, sites and vessels over the past five seasons. It shows the industry growth over the period 2021-2025, and projections* for 2026-27.

Table 1: The number of landed passengers, voyages, landings, sites and IAATO vessels on the Antarctic Peninsula between 2021–2025, and projected* numbers for 2026-27 (as of April 10, 2026). The data presented in Table 1 includes IAATO Operator yachts.

Season	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27*
Passengers	22979	70296	78902	79179	85195	79176*
Voyages	235	514	553	555	539	562*
Landings	1703	3576	3832	3666	3425	-
Sites	163	208	258	213	206	-
Vessels	40	50	55	52	47	45*

Trends in the above data can be attributed to:

- There has been substantial investment by operators in existing and new build vessels since the IMO’s International Code for Ships Operating in Polar Waters (Polar Code 2017) was adopted, with the first new SOLAS vessels launched in 2019.
- 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. The 2022-23 season saw the launch of these delayed vessels.
- Operators saw fewer clients willing to travel during the 2021-22 season due to COVID-19, resulting in lower occupancy, and had to truncate their season with the emergence of the Omicron variant.
- As new vessels are introduced into the IAATO fleet, the average passenger capacity per vessel has increased. For example, many new Category 1 vessels added to the fleet now operate at or close to their upper limit capacity of 200 passengers.
- The number of sites used for landings during the 2025-26 season has decreased compared to prior seasons. This can be attributed to:
 - Analysis of site use and activities (found in ATCM 48 IPXXX IAATO Vessel Overview of Antarctic Tourism: 2025-26 Season and Preliminary Estimates for 2026-27 Season) has shown operators are responding to IAATO’s multilayered strategy to encourage them to spread activities across a range of platforms and sites: ship cruising; small boat cruising; kayaking; etc., to reduce landed activities.

IAATO has encouraged this practice since 2012 and strengthened it at our 2019 annual meeting by incorporating it into our Bylaws and the IAATO Vessel Code of Conduct.

- Operators utilising sites for marine activities rather than landings (e.g. small boat cruising, kayaking). This practice has been strengthened by the creation of the IAATO Marine Only Site Guidelines, which provide confidence in a site and the attributes that contribute to successful marine activity.
- More accurate reporting of site information by operators and refinement of data when PVRs are submitted. Each PVR is manually checked to ensure data is recorded accurately, and individual follow-up with operators is provided as needed.
- Difficult weather during the season led to cancelled landings and voyages being shortened by a day or more.

Specific Landing Site Use for the 2025-26 season

During the 2025-26 season, landings occurred in the Antarctic Treaty area over a period of approximately 164 days from 19 October 2025 to 01 April 2026.

There is variation in activity levels that are remarkably similar from season to season, demonstrating fluctuations in visitation resulting from expedition schedules largely revolving around holiday-season timetables.

Figure 2 illustrates the average number of landed visits at all sites within the Antarctic Peninsula over a five-year period (2021-2025).

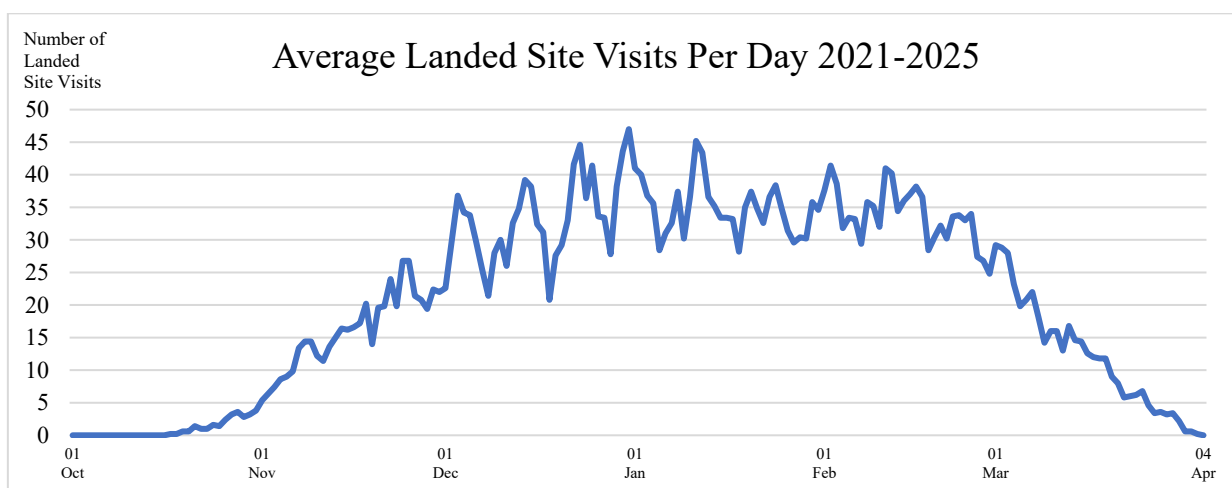


Figure 2: Average Landed Site Visits per day at all sites within the Antarctic Peninsula 2021-2025.

The top five landed visitor sites by vessels for the 2025-26 season were Neko Harbour, Whaler's Bay, Portal Point, Cuverville Island, and Damoy Point/Dorian Bay. These site visits account for approximately 26.5% of all landed visits made during the season. The top 20 most-visited sites accounted for approximately 65.5% of all landed visits. All of the top 20 sites are managed by ATCM or IAATO Visitor Site Guidelines or through National Antarctic Program Management guidelines.

Appendix I lists the 20 most-visited sites in terms of landed visits made by vessels from 2021-25.

Factors such as ice patterns and weather are also powerful contributors to site selection and visitation patterns, by either allowing or restricting access. Additionally, during the 2025-26 season, site selection focused on enhanced biosecurity procedures for Highly Pathogenic Avian Influenza (HPAI). As a result, sites such as Palaver Point, Portal Point and Whalers Bay experienced higher visitation due to their open spaces, which were located away from wildlife.

In contrast to the 2024-25 season, when Cuverville Island was closed for most of the season due to HPAI precautions, Cuverville Island had increased visitation in 2025-26 as it was open for visitation the entire season. In Appendices II and III, sites that were closed due to HPAI precautions are also noted.

Use of ATCM Visitor Site Guidelines

Appendix II provides a five-year analysis (2021-25) of the total number of active seasons and the total number of known landings at sites covered by the ATCM Visitor Site Guidelines. An assessment of the use of sites covered by the ATCM Visitor Site Guidelines was conducted by analysing the IAATO Operator-submitted Post-Visit Report Forms for traditional commercial shipborne and yacht tourism in the Antarctic Peninsula.

IAATO receives feedback on site usage from Competent Authorities/National Antarctic Programs, IAATO Field Operations Committee, those in the field with IAATO Operators and/or through the IAATO Site Stewardship program. This information is analysed and reviewed to determine if adjustments are needed to existing site guidelines or if the creation of new site guidelines is recommended.

This site feedback includes both ATCM Guidelines and IAATO Guidelines. In the scenario, when an ATCM Visitor Site Guideline is not under review by the Parties, addenda are added to the existing site guidelines in the IAATO Field Operations Manual (FOM).

During the 2025-26 season, IAATO identified two ATCM Site Guidelines which had suggested updates for environmental or safety reasons. These sites are:

- Damoy Point/Dorian Bay (IAATO Addendum to ATCM Guideline)
- Detaille Island (IAATO Addendum to ATCM Guideline)

These two IAATO addenda 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*)

Use of IAATO Visitor Site Guidelines

In addition to the ATCM Visitor Site Guidelines, IAATO Operators are also bound by IAATO Visitor Site Guidelines, which have been implemented to further support site management where ATCM Site Guidelines are not yet in place. The sites can be either terrestrial or marine-based, and the criteria by which they are created include sites which are visited often, have particular values to be protected, and/or need specific guidance for safety and/or environmental reasons. IAATO continues to update and enhance guidelines and operational procedures as appropriate.

Appendix III provides a list of visitor sites and seasonal numbers for sites covered by IAATO Visitor Site Guidelines. IAATO welcomes collaboration with Parties on the development of new site guidelines and the review of any existing IAATO site-specific guidelines.

IAATO adopted two addenda to ATCM Site Guidelines and eight new IAATO Site Guidelines at its 2026 annual meeting. These guidelines, both terrestrial and marine-based, can be found as attachments to this information paper. In a concerted effort to increase the number of site-specific guidelines,

These include:

- 1) IAATO Addendum, Damoy Point/Dorian Bay
- 2) IAATO Addendum, Detaille Island
- 3) Edinburgh Hill, Livingston Island
- 4) False Island Point, Vega Island
- 5) Fish Islands

- 6) Hall Peninsula, Snow Island
- 7) Kayak Bay, Brabant Island (Marine Only)
- 8) Recess Cove and Musnier Point
- 9) View Point, Duse Bay
- 10) Walker Bay, Livingston Island

IAATO has adopted 49 new Site Guidelines over the past four years, and now operates 44 IAATO Visitor Site Guidelines. Five of the 49 site guidelines, addenda added to ATCM Visitor Site Guidelines, were accepted by ATCM 47 (ATCM 47 WP021 rev.1 *Proposed updates to five Visitor Site Guidelines*), and two new addenda have been put forward for acceptance at ATCM48 by the United Kingdom (ATCM48 WP035 *Proposed updates to two Visitor Site Guidelines*).

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 how these data are collected, categorised, and stored, with a database that now encompasses more detailed activity categories and updates to site-region details. In the past year, IAATO has expanded upon the previous site regions (Antarctic Peninsula, Ross Sea, etc) to provide more accurate and detailed information on IAATO Operator site usage in Antarctica.

The expanded site region list is now:

- 1) IAATO Members Traditional Seaborne Tourism - Peninsula Region
- 2) IAATO Members Air-Cruise Tourism - Peninsula Region
- 3) IAATO Members Yacht Tourism - Peninsula Region
- 4) IAATO Cruise Only Tourism - Peninsula Region
- 5) IAATO Members Traditional Seaborne Tourism - Ross Sea Only
- 6) IAATO Members Traditional Seaborne Tourism - East Antarctica Only
- 7) IAATO Members Traditional Seaborne Tourism - East Antarctica and Ross Sea
- 8) IAATO Members Traditional Seaborne Tourism - Ross Sea and Peninsula

Until recently, data collation was done manually. Advances in technology and data analysis capability have allowed large data sets to be analysed more effectively and quickly than previously possible. This, and comprehensive reviews of historical datasets, have identified and resolved certain inaccuracies (e.g. terrestrial landings at marine-only sites). IAATO therefore strongly recommends that all data users contact IAATO directly to obtain the most recent information available prior to conducting analyses, rather than relying on previously downloaded data.

To request IAATO data, please visit: <https://iaato.org/news-room/data-statistics>

Conclusion

The information extracted from these ATCM Post Visit Report forms for traditional commercial seaborne tourism in the Antarctic Peninsula shows that while overall tourism levels continued to rise after the COVID-19 pandemic, the increase is not uniform across all visitor sites, as demonstrated in Appendices II and III. A few sites continue to be very popular, with a greater increase in activity, while others saw a decrease. 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, 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 the top 20 landed sites on the Peninsula are managed by ATCM or IAATO Visitor Site Guidelines or through National Antarctic Program Management guidelines.

IAATO will continue to provide the CEP and ATCM with annual information on its operators' activities. In addition, IAATO Operators remain interested in gaining a better understanding of the use of ATCM Visitor Site Guidelines and site visits by non-IAATO visitors.

Appendices

Appendix I: Top twenty sites, by landed site visits between 2021-25 seasons (including yacht visits)

Appendix II: Landed site visits per season covered by the ATCM Visitor Site Guidelines from 2021-25 season (including yacht visits)

Appendix III: Number of landed and non-landed site visits covered by IAATO Site Specific Guidelines for the 2022-25 season, including yachts

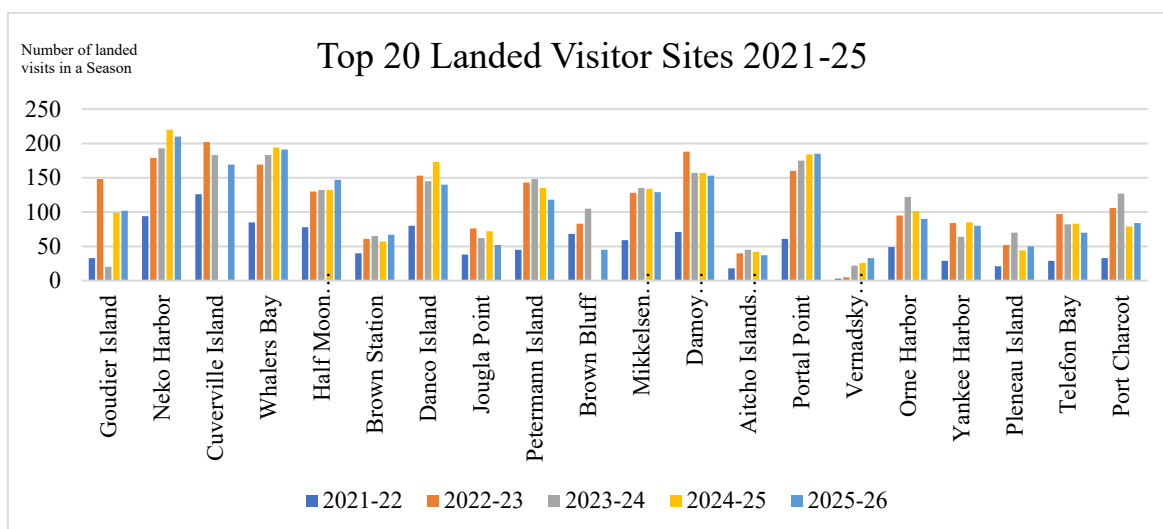
Appendix I: Top twenty sites, by landed site visits between 2021-25 seasons (including yacht visits)

	2021-22	2022-23	2023-24	2024-25	2025-26
Neko Harbor	94	179	193	220	210
Whalers Bay	85	169	183	194	191
Portal Point	61	160	175	184	185
Cuverville Island	126	202	183	107*	169
Damoy Point/Dorian Bay	71	188	157	157	153
Half Moon Island - Chinstrap Colony	78	130	132	132	147
Danco Island	80	153	145	173	140
Mikkelsen Harbor (D'Hainaut)	59	128	135	134	129
Petermann Island	45	143	148	135	118
Goudier Island	33	148	20	99	102
Orne Harbor	49	95	122	101	90
Port Charcot	33	106	127	79	84
Yankee Harbor	29	84	64	85	80
Telefon Bay	29	97	82	83	70
Brown Station	40	61	65	57	67
Jougla Point	38	76	62	72	52
Pleneau Island	21	52	70	44	50
Brown Bluff	68	83	105	30*	45
Aitcho Islands - Barrientos Island	18	40	45	42	37
Vernadsky Station	3	5	22	26	33
Other Frequented Sites of Note for 2025-26					
Palaver Point	6	25	75	114	108

* *Brown Bluff* was closed December 12, 2024 – February 26, 2025, due to HPAI precautions

* *Cuverville Island* was closed December 11, 2024 – January 22, 2025, due to HPAI precautions

Graphical Depiction of Appendix I: Top twenty sites, by landed site visits between 2021-25 seasons (including yacht visits)



Appendix II: Landed site visits per season covered by the ATCM Visitor Site Guidelines from 2021-25 season (including yacht visits)

	2021-22	2022-23	2023-24	2024-25	2025-26
Ardley Island	11	8	6	5	4
Astrolabe Island	1	3	10	7	8
Baily Head	11	6	7	6	8
Barrientos (Aitcho) Island	18	40	45	42	37
Brown Bluff	68	83	105	30*	45
Cape Denison	0	0	0	3	0
Cape Evans	1	10	10	7	11
Cape Hallett	0	2	3	0	2
Cape Royds	2	7	7	7	12
Cuverville Island	126	202	183	107*	169
Damoy Point / Dorian Bay	71	188	157	157	153
Danco Island	80	153	145	173	140
Detaille Island	1	25	44	34	33
Devil Island	17	34	24	6	11
D'Hainaut (Mikkelsen Harbour)	59	128	135	134	129
George's Point (Ronge Island)	7	29	22	37	28
Goudier (Port Lockroy) Island	33	148	20	99	102
Halfmoon Island – Chinstrap Colony	78	130	132	132	147
Hannah Point	10	16	8	8	2
Horseshoe Island	10	30	24	21	21
Jougla Point	38	76	62	72	52
Neko Harbour	94	179	193	220	210
Orne Harbour	49	95	122	101	90
Orne Islands	14	15	17	14	14
Paulet Island	35	54	39	20	14
Pendulum Cove	9	16	29	37	18
Penguin Island	14	13	16	28	12
Petermann Island	45	143	148	135	118
Pleneau Island	21	52	70	44	50
Point Wild	2	1	5	5	11
Port Charcot	32	104	127	79	84
Portal Point	61	159	175	184	185
Shingle Cove	9	11	13	3	7
Snow Hill Island, Nordenskjold's hut	7	19	8	0	2
Stonington Island	13	37	23	21	30
Taylor Valley / Canada Glacier	0	2	0	2	4
Telefon Bay	30	97	82	83	70
Turret Point	5	3	9	5	8
Whalers Bay	85	169	183	194	191
Wordie House	2	24	32	45	39
Yalour Islands	5	45	48	42	53
Yankee Harbour	29	84	64	85	80

* *Brown Bluff* was closed December 12, 2024 – February 26, 2025, due to HPAI precautions

* *Cuverville Island was closed December 11, 2024 – January 22, 2025, due to HPAI precautions*

Appendix III: Number of landed and non-landed visits to sites covered by IAATO Site Specific Guidelines 2022-25 season, including yachts.

Site	Guideline Type	2022-23	2023-24	2024-25	2025-26
Bongrain Point	Terrestrial	31	15	8*	26
Cape Lookout	Terrestrial	6	8	15	8
Charlotte Bay	Marine	40	51	69	91
Chiriguano Bay	Marine	16	49	43	35
Cierva Cove	Marine	112	138	126	131
Curtiss Bay	Marine	14	21	29	22
Edinburgh Hill	Terrestrial	8	33	38	42
Elephant Point	Terrestrial	24	6	13	22
Enterprise Island/Foyn Harbour	Terrestrial	74	93	90	117
False Island Point	Terrestrial	6	1	2	3
Fish Islands	Terrestrial	23	33	24	25
Flanders Bay	Marine	16	1	41	40
Fort Point	Terrestrial	14	29	47	31
Gourdin Island	Terrestrial	7	24	10	21
Hall Peninsula	Terrestrial	8	5	5	3
Hidden Bay	Marine	22	23	20	0
Hovgaard Island	Terrestrial	30	38	38	32
Hydruga Rocks	Terrestrial	47	60	32	40
Jenny Island	Terrestrial	10	16	6*	9*
Kayak Bay	Marine	5	17	13	7
Kerr Point (Ronge Island)	Terrestrial	23	18	30	14
Kinnes Cove/Madder Cliffs	Terrestrial	11	27	21	7
Leith Cove	Terrestrial	23	52	47	61
Melchior Island	Terrestrial	71	59	102	85
Palaver Point	Terrestrial	28	86	117	113
Penguin Point	Terrestrial	0	2	1	2
President Head	Terrestrial	15	22	23	8
Prospect Point	Terrestrial	16	25	15	33
Punta Vidt	Terrestrial	2	18	35	31
Recess Cove	Terrestrial	10	29	36	69
Red Rock Ridge	Terrestrial	14	18	20	23
Robert Point	Terrestrial	7	12	3*	11
Sandefjord Bay	Marine	2	3	1	1
Skontorp Cove	Marine	65	72	88	106
Snow Hill Emperor Penguin Colony	Terrestrial	8	11	3	18
Spert Island	Marine	33	67	62	53
Stony Point	Terrestrial	9	9	21	27
Tay Head	Terrestrial	11	13	5*	3
The Naze	Terrestrial	14	10	2	4
Useful Island	Terrestrial	56	50	8*	34
View Point	Terrestrial	3	8	1	0
Walker Bay	Terrestrial	19	16	21	27

**Bongrain Point was closed on January 19, 2025, for the remainder of the season due to HPAI precautions*

**Jenny Island was closed December 16, 2024, for the remainder of the season due to HPAI precautions. It was also closed on December 26, 2025, for the remainder of the season due to HPAI precautions.*

**Robert Point was closed on December 2, 2024, for the remainder of the season due to HPAI precautions*

**Tay Head was closed on January 27, 2025, for the remainder of the season due to HPAI precautions*

**Useful Island was closed December 4, 2024, for the remainder of the season due to HPAI precautions*