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**IAATO Deep Field and Air Operators'
Overview of Antarctic Tourism: 2025-
26 Season and Preliminary
Estimates for 2026-27 Season**

IAATO Deep Field and Air Operators' Overview of Antarctic Tourism: 2025-26 Season and Preliminary Estimates for 2026-27 Season

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

Summary

This paper provides statistical data from IAATO's Deep Field and Air Operator Post Visit Reports for the 2025-26 season, covering tourism conducted by members operating in these areas. It also includes preliminary estimates from Deep Field and Air operators for the 2026-27 season. Historical and current data are included to support discussions on the growth and diversification of deep field and air-based tourism activities.

Introduction

IAATO is pleased to provide the statistical data compiled from IAATO Deep Field and Air Operators' (DF&AO) Post Visit Reports for the 2025-26 season and the preliminary estimates for the 2026-27 season as of 10 April 2026.

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 and Antarctic Peninsula Air / Land Operators in Post Visit Reports (PVRs). We separate out these different modes and regions of non-seaborne travel as a continued effort to refine data that Parties may find useful.

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., the Transglobe Expedition (1980–81) and In the Footsteps of Scott (1984–1987). DF&AO activities, as they are today, follow ATCM, COMNAP and IAATO policies and guidelines, and have been permitted or authorised since the 1990s. Activities are permitted or authorised in advance of the season by National Competent Authorities through Environmental Impact Assessments, Advance Notifications and, where required, Waste Management Permits.

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.

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. These proactive contingency plans allow operators to maintain self-sufficiency in Antarctica.

All DF&AO operate in areas where National Antarctic Programs (NAPs) also have active flight and field activities. Deconfliction of NAP and DF&AO activities is therefore crucial. To this end, all DF&AO maintain close contact with NAPs operating in their area, exchanging flight and meteorological data.

DF&AO provide logistic support to a range of NAPs and research groups. Support will vary from season to season, depending on projects and funding. NAP and research groups may request support in areas not included in DF&AOs’ submissions to their Competent Authorities. Support is regularly authorised or permitted separately by the respective NAP or research group through their relevant Competent Authority.

Visitor numbers reflect only those travelling with IAATO Operators and do not include observers, government officials, or individuals participating in research projects supported by DF&AO. It does not include information from any non-IAATO Operators, nor does it include information about IAATO Operator support for NAPs.

For IAATO Vessel Operator information, please refer to ATCM48 IP200 *IAATO Vessel Overview of Antarctic Tourism: 2025-26 Season and Preliminary Estimates for 2026-27 Season*.

1.0 IAATO Intracontinental Deep Field and Air Operations Overview

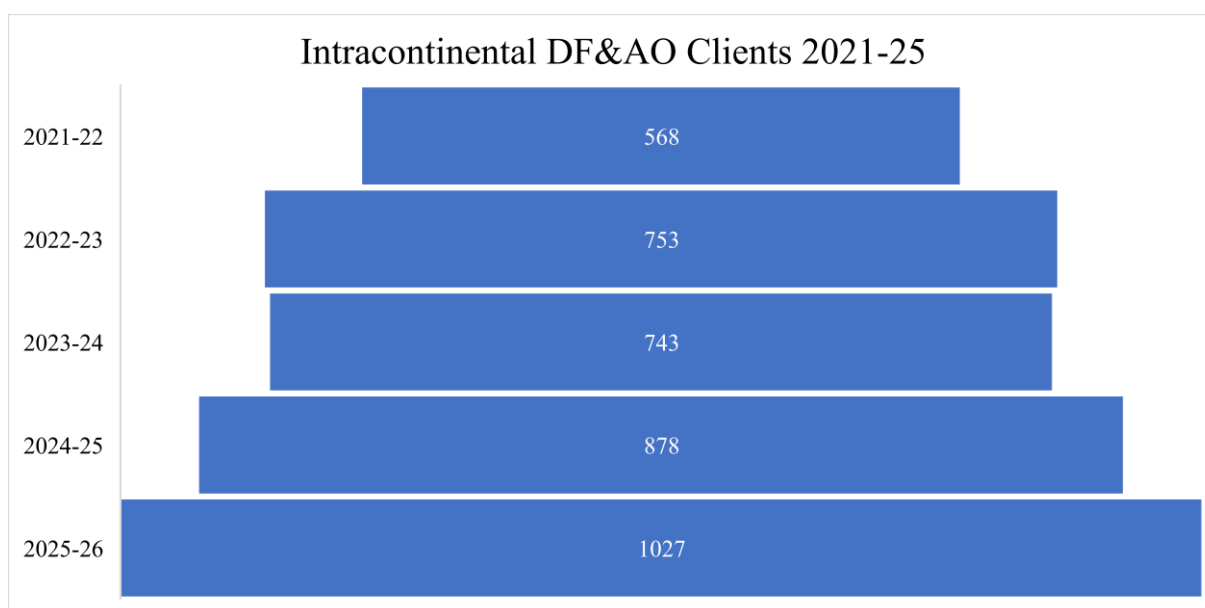
This section focuses on IAATO Intracontinental DF&AO activities. These activities encompass private-sector flights (inter- and intra-continental), and overland activities by foot, kite, ski or vehicle.

1.1 IAATO Intracontinental Deep Field and Air Operator Client Numbers

Intracontinental DF&AO accounts for roughly 1% of all visitors to Antarctica. Intracontinental 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.

Figure 1 gives an overview of the IAATO Intracontinental DF&AO client numbers from 2021-22 to 2025-26. The total number of participants includes clients from all four IAATO Intracontinental DF&AO. Note: during the 2021-22 season, only three intracontinental DF&AO ran programs for visitors.

Figure 1: IAATO Intracontinental Deep Field and Air Operator Clients 2021-22 to Present



1.2 IAATO Intracontinental Deep Field and Air Operators and areas of operation

IAATO membership currently includes four intracontinental DF&AO who conduct tourism activities, serviced by private-sector flights (inter- and intra-continental) and/or vehicles.

Intracontinental DF&AO also utilises a limited number of seasonal satellite field camps and runways for its various activities and flights.

Table 1 provides a current overview of Intracontinental IAATO DF&AO primary areas of seasonal operations/main camp.

Table 1. IAATO Intracontinental 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 Season |
|---|--------------------------------------|---|---------------------------------|
| 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 Pole of Inaccessibility | 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 |

**Ultima Expeditions, previously The Antarctic Company (TAC), operating 2004-2020*

Figures 2-12 provide a pictorial view of the four IAATO Intracontinental DF&AO primary areas of tourism operations. Intracontinental 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. These figures do not show the wider range of science and/or logistics support.

Figure 2: Intracontinental DF&AO who visit South Pole

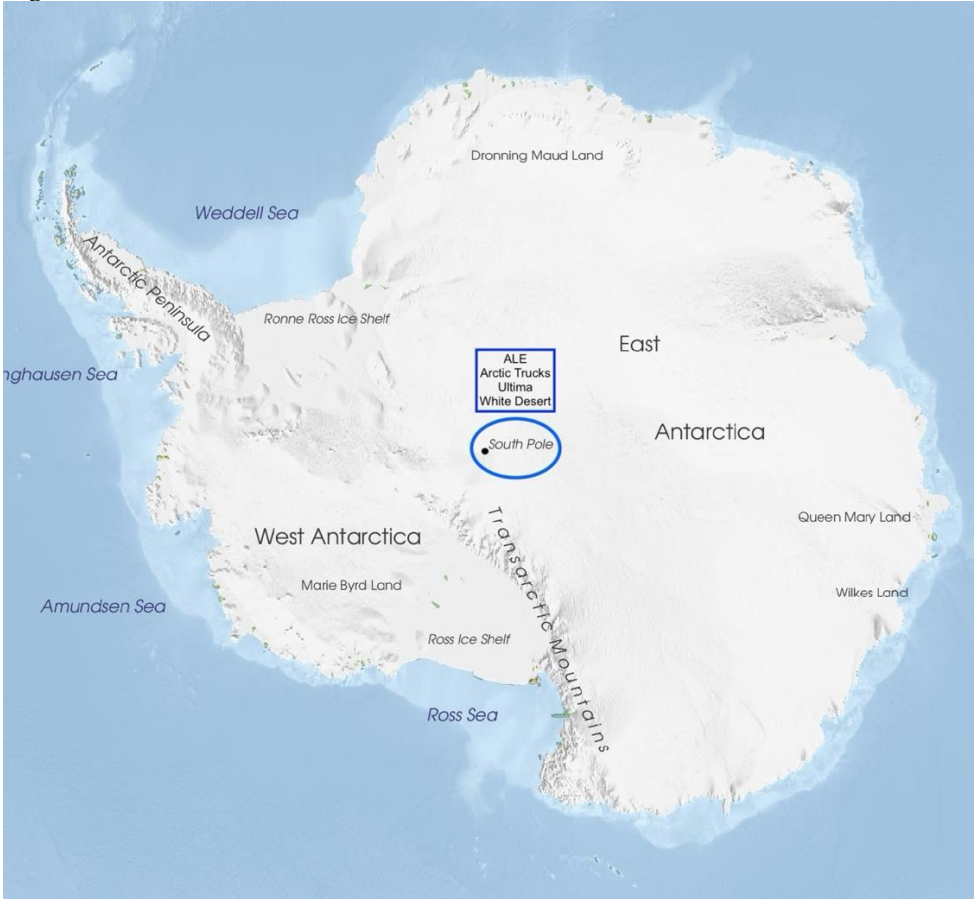


Figure 3: White Desert Tourism Areas of Operation Expanded View

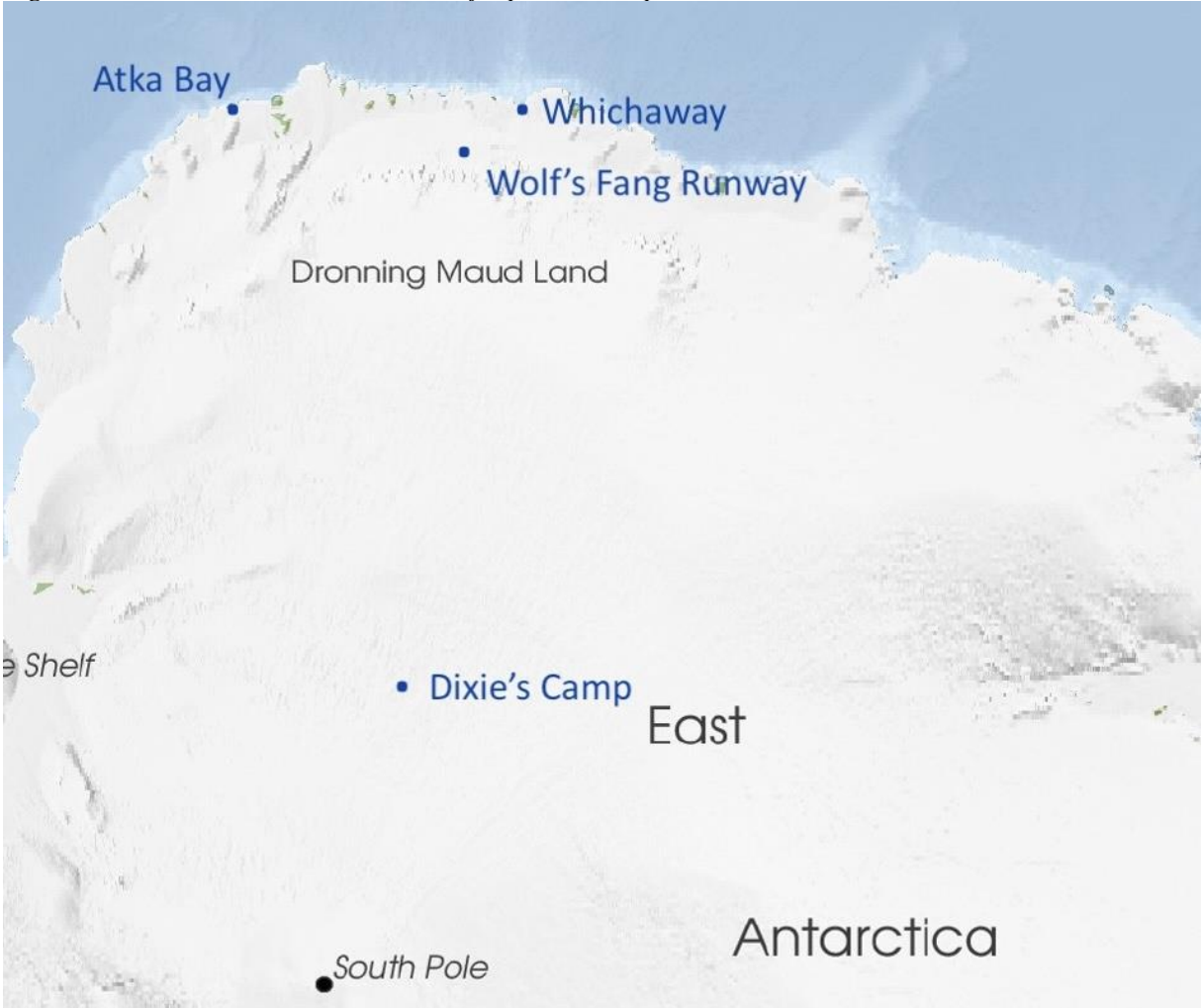


Figure 4: White Desert Overland Traverse Route Expanded View

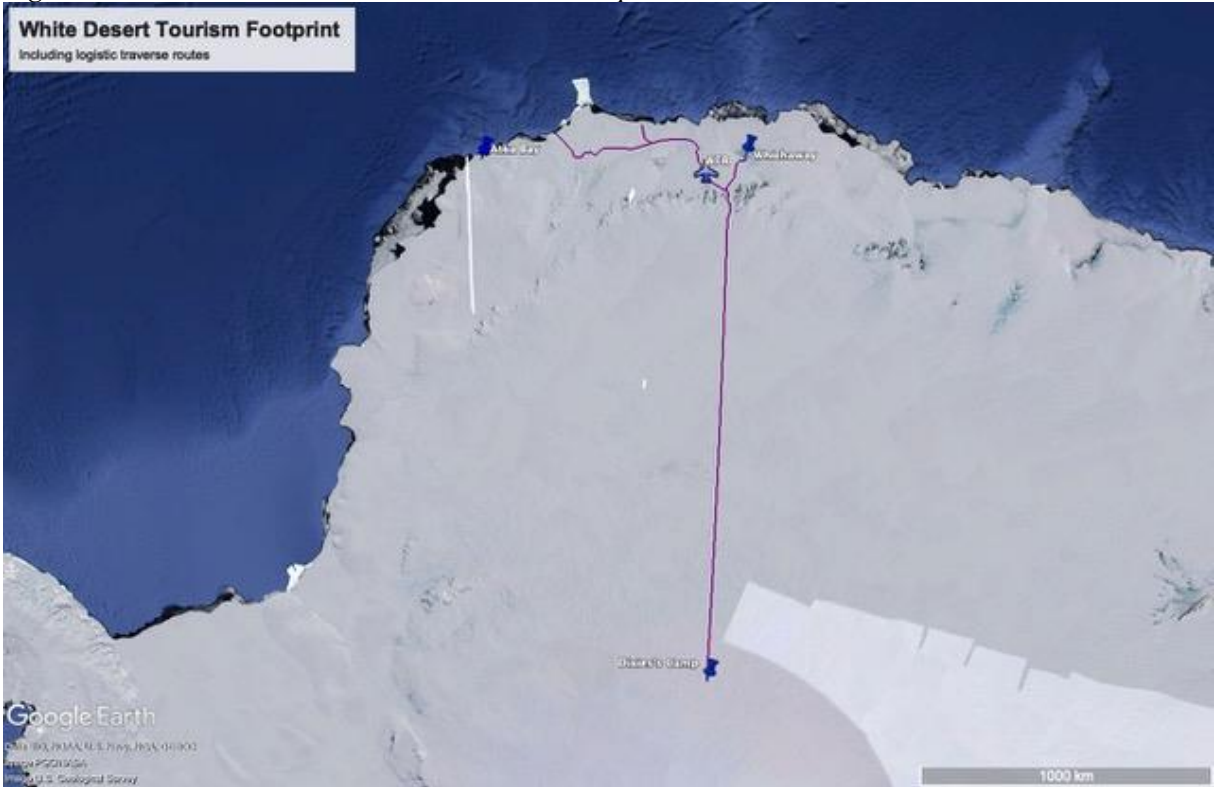


Figure 5: White Desert Tourism Areas Wolfs Fang Runway

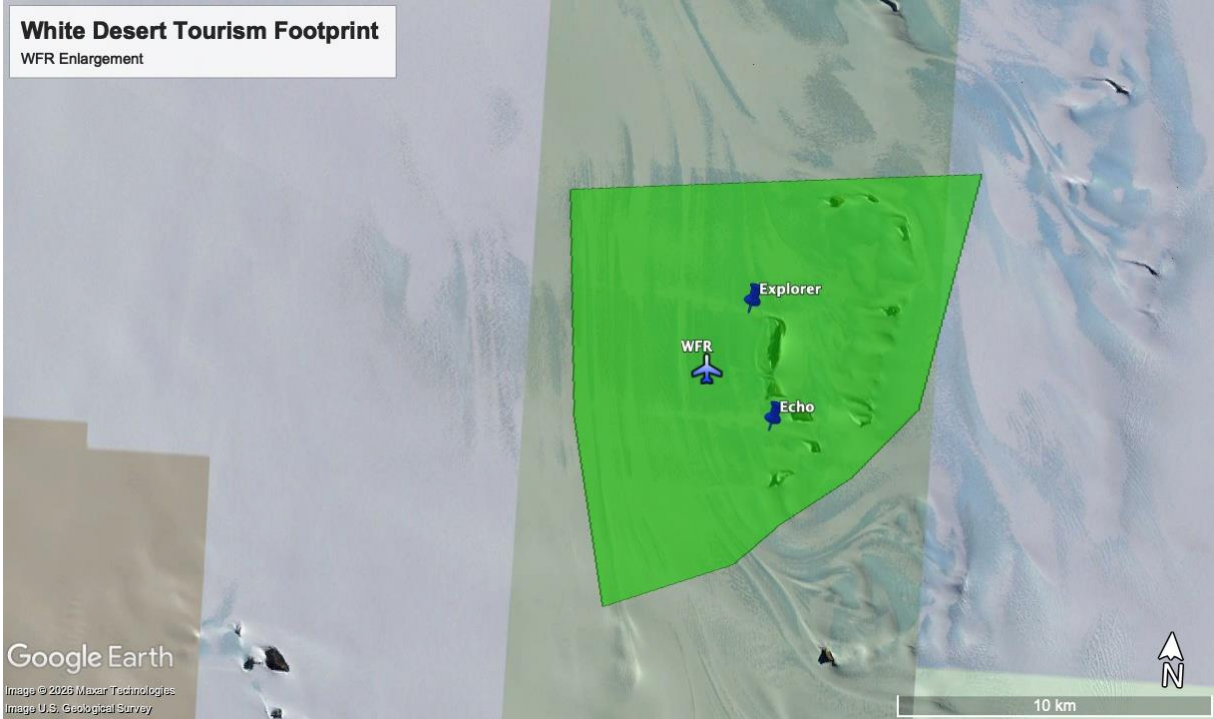


Figure 6: White Desert Tourism Areas Wolfs Fang Runway and Whichaway



Figure 7: Ultima Expedition Overland Route to South Pole

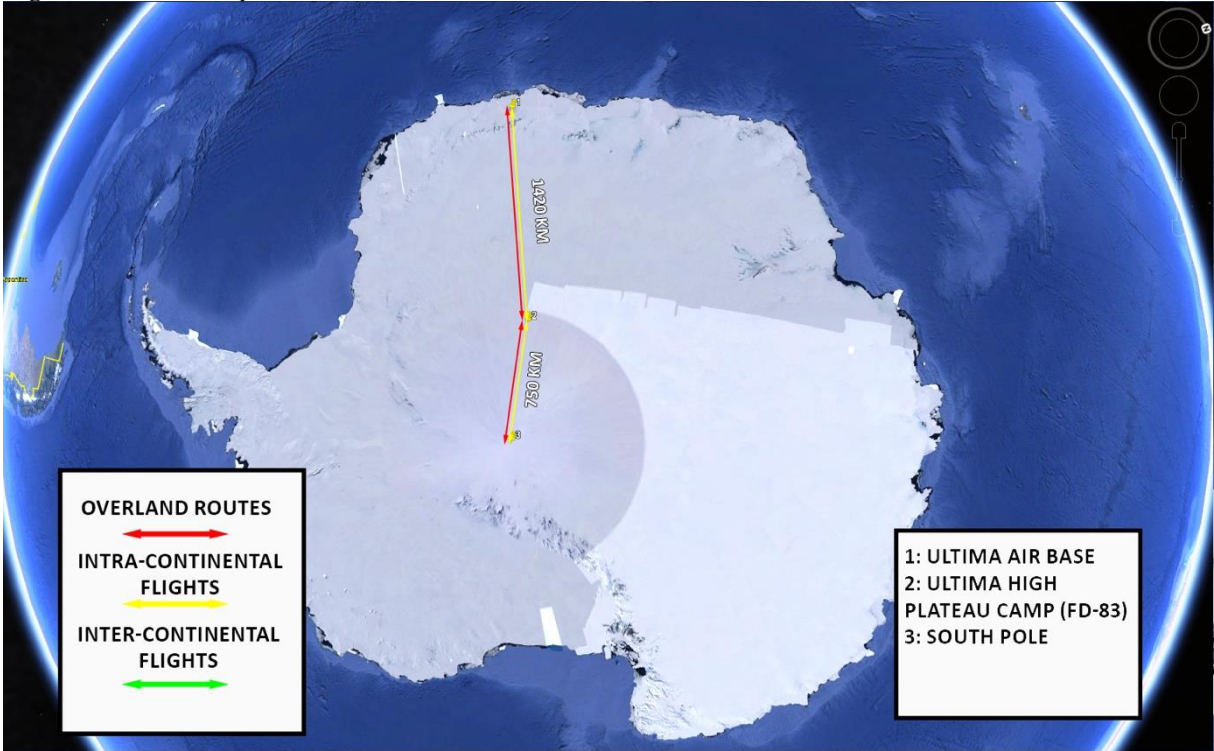


Figure 8: Ultima Expedition Oasis Camp Tourism Area

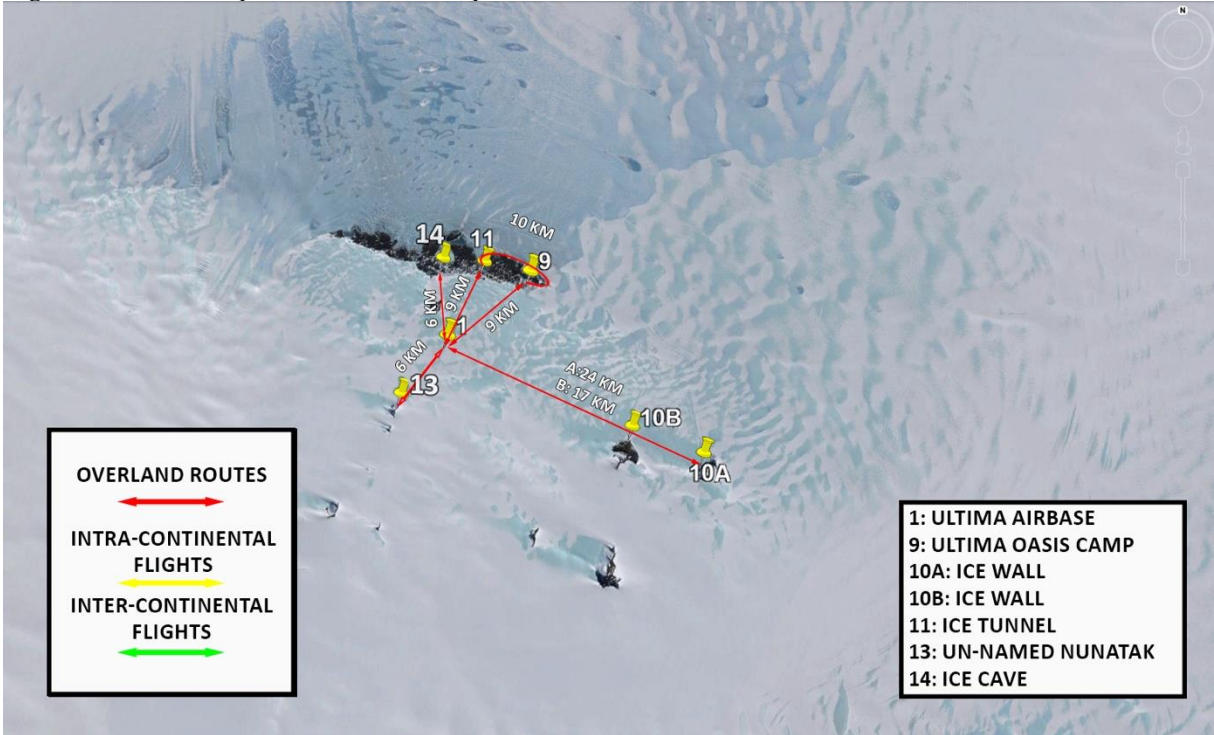


Figure 9: Ultima Expedition Tourism Areas Dronning Maud Land

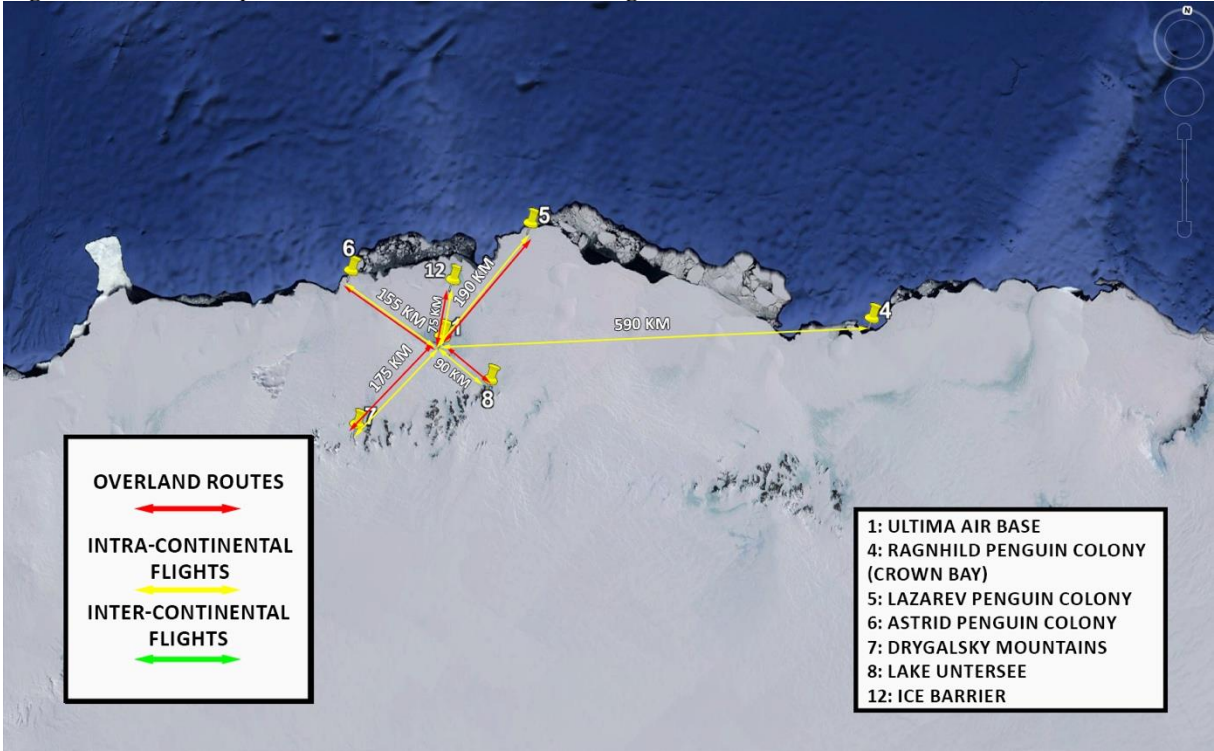


Figure 10: Arctic Trucks Overland Repeat Tourism Routes



Figure 11: Antarctic Logistics and Expeditions Union Glacier and Ellsworth Mountains Tourism Areas

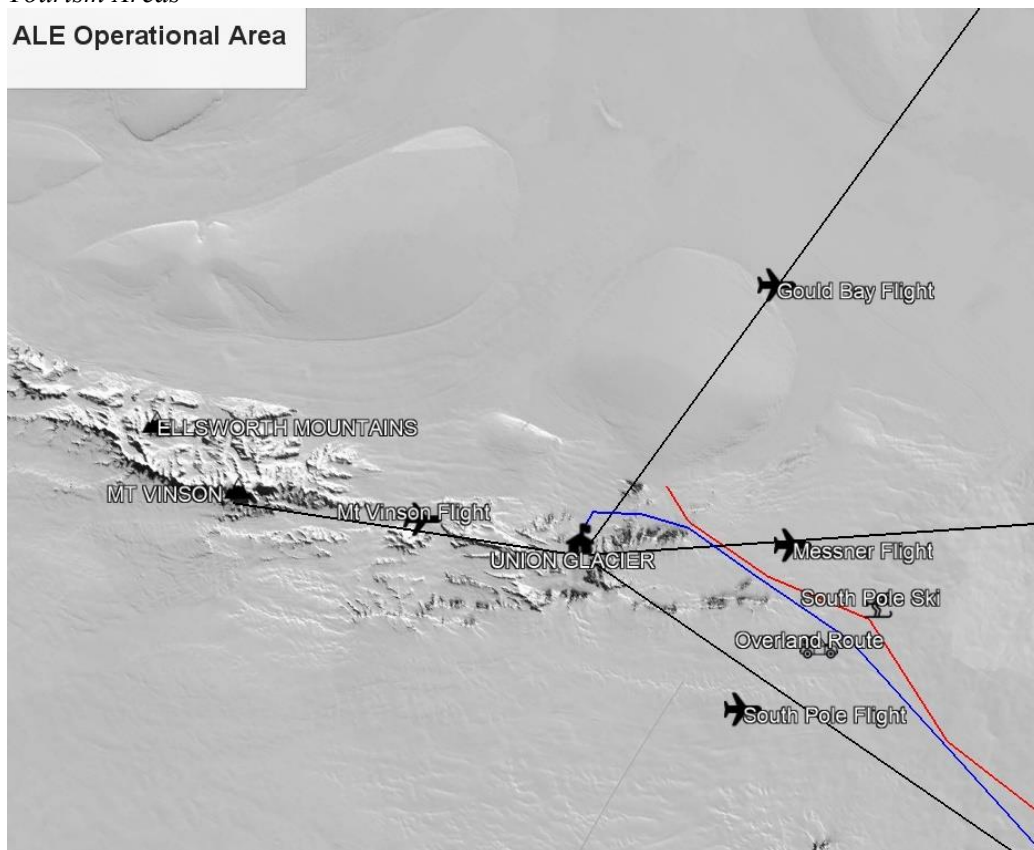
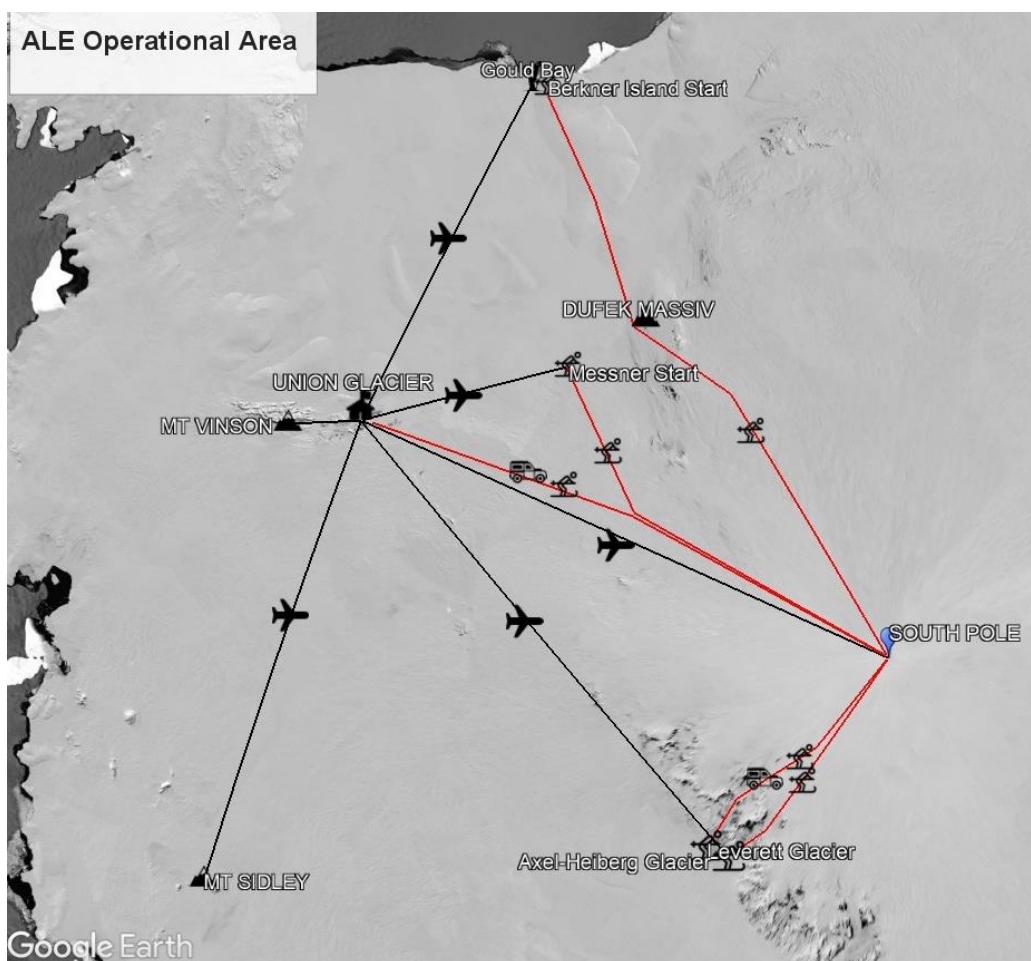


Figure 12: Antarctic Logistics and Expeditions Mt. Sidley and Gould Bay Tourism Areas



1.3 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 2021-25*. 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.

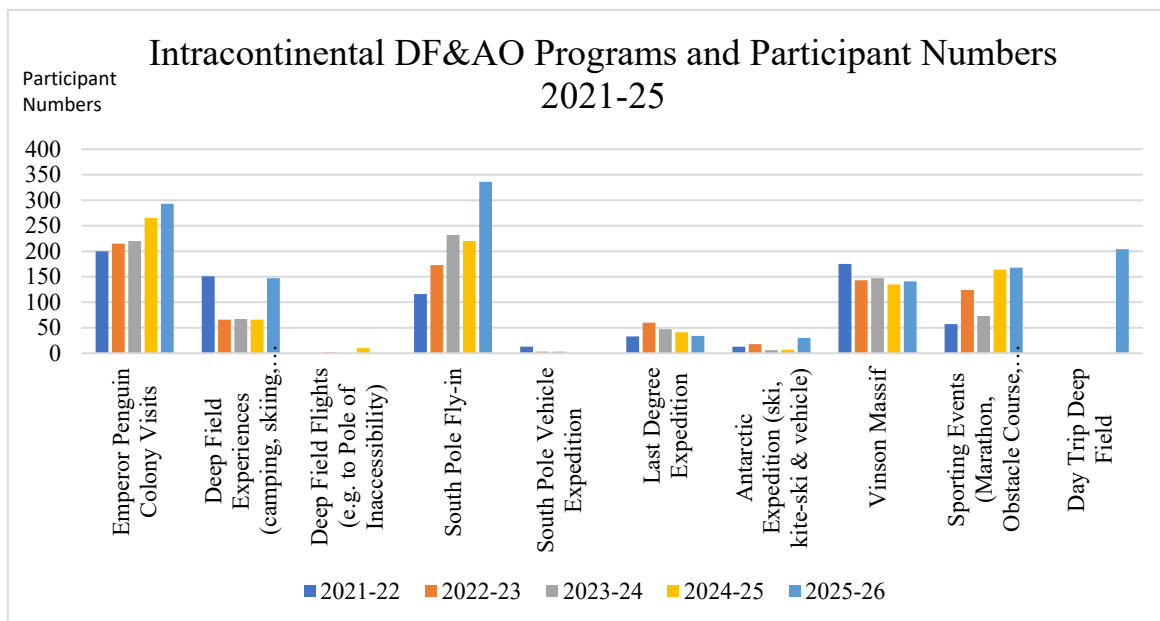
Table 2 provides additional information on IAATO DF&AO’s activities, along with a graphical representation.

Table 2: IAATO Deep Field and Air Programs and Participant Numbers (clients) for 2021-22 to 2025-26 (Note: some participants may take part in several programs)

| Program | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 |
|---|---------|---------|---------|---------|---------|
| Emperor Penguin Colony Visits | 200 | 215 | 220 | 265 | 293 |
| Deep Field Experiences (camping, skiing, kite-skiing, mountaineering, skydiving, cycling, etc.) | 151 | 66 | 67 | 66 | 147 |
| Deep Field Flights (e.g. to Pole of Inaccessibility) | 0 | 2 | 0 | 10 | 0 |
| South Pole Fly-in | 116 | 173 | 232 | 220 | 336 |
| South Pole Vehicle Expedition | 13 | 3 | 3 | 0 | 0 |
| Last Degree Expedition | 33 | 60 | 47 | 41 | 34 |
| Antarctic Expedition (ski, kite-ski & vehicle) | 19 | 41 | 22 | 24 | 30 |
| Vinson Massif | 175 | 143 | 147 | 135 | 141 |
| Sporting Events (Marathon, Obstacle Course, etc) | 57 | 124 | 73 | 164 | 168 |

| | | | | | |
|---------------------|---|---|---|---|-----|
| Day Trip Deep Field | - | - | - | - | 204 |
|---------------------|---|---|---|---|-----|

Graphical Depiction of Table 2: Programs and Participant Numbers (clients) for 2021-22 to 2025-26, (Note: some participants may take part in several programs)



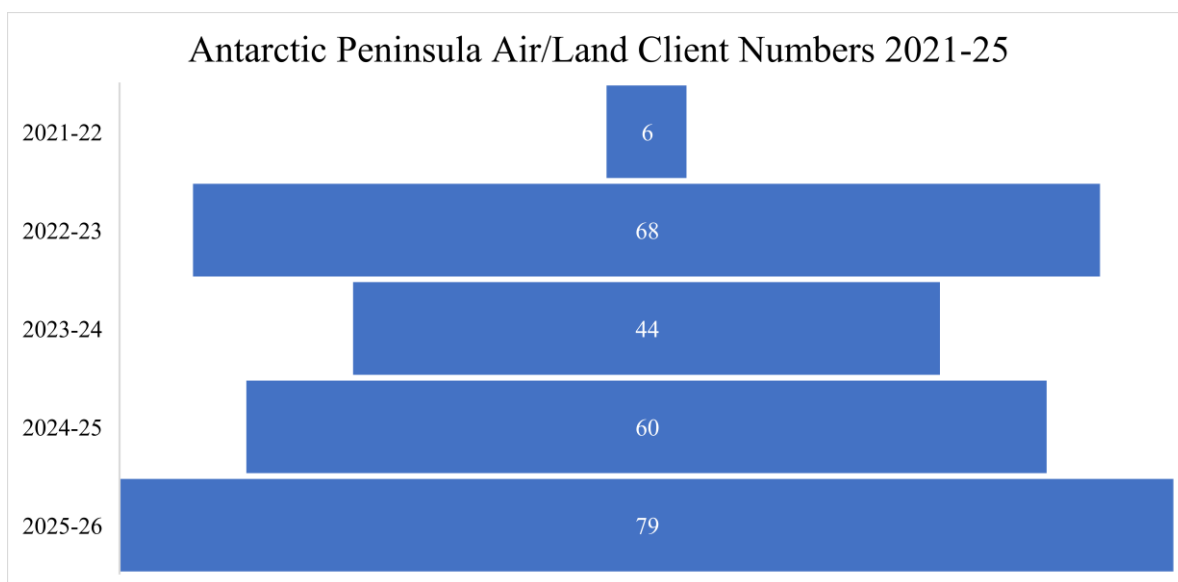
2.0 IAATO Antarctic Peninsula Air/Land Operators and areas of operation

2.1 IAATO Antarctic Peninsula Air/Land Operators Client Numbers

IAATO Antarctic Peninsula Air/Land Operators account for less than 0.1% of all visitors to Antarctica. Similar to other DF&AO, they maintain a higher staff-to-client ratio than is typical for vessel-based tourism, often one guide to every eight clients (1:7).

Figure 13 gives an overview of the IAATO Antarctic Peninsula Air/Land Operators client numbers from 2021-22 to 2025-26.

Figure 13: IAATO Antarctic Peninsula Air/Land Operators Clients 2021 to Present



2.2 IAATO Antarctic Peninsula Air/Land Operators’ areas of operation

IAATO membership currently includes one air operator, DAP Antarctica, that supports single- or multi-day Antarctic experiences in the South Shetland Islands.

Additionally, at its 2025 annual meeting, IAATO accepted a new air/land operator, Voyal, which expects to operate flights to Dundee Island and offer single- and/or multi-day Antarctic experiences. To date, Voyal has not engaged in tourism operations; however, it is listed in preliminary estimates for 2026-27 in Appendix 2.

Table 3 provides a current overview of the primary areas of seasonal operation for IAATO Antarctic Peninsula Air/Land Operators.

Table 3. IAATO Antarctic Peninsula Air/Land Operators

| Antarctic Peninsula Air / Land Operators | Main Runway | Main Area of Operation | First Operational Season |
|--|--------------------|------------------------|--------------------------|
| DAP Antarctica | King George Island | King George Island | 2003 |
| Voyal** | Dundee Island | Dundee Island | 2026 (Tentative) |

**Voyal is currently an IAATO Provisional Operator that submits advanced notification to the Argentine Competent Authority. Should they operate in 2026-27, they will participate in the IAATO provisional observer program.

Figures 14 and 15 provide pictorial views of the IAATO Antarctic Peninsula air/ land operators’ area of operation.

Figure 14: IAATO Antarctic Peninsula Air/Land Operators Primary Areas of Operation

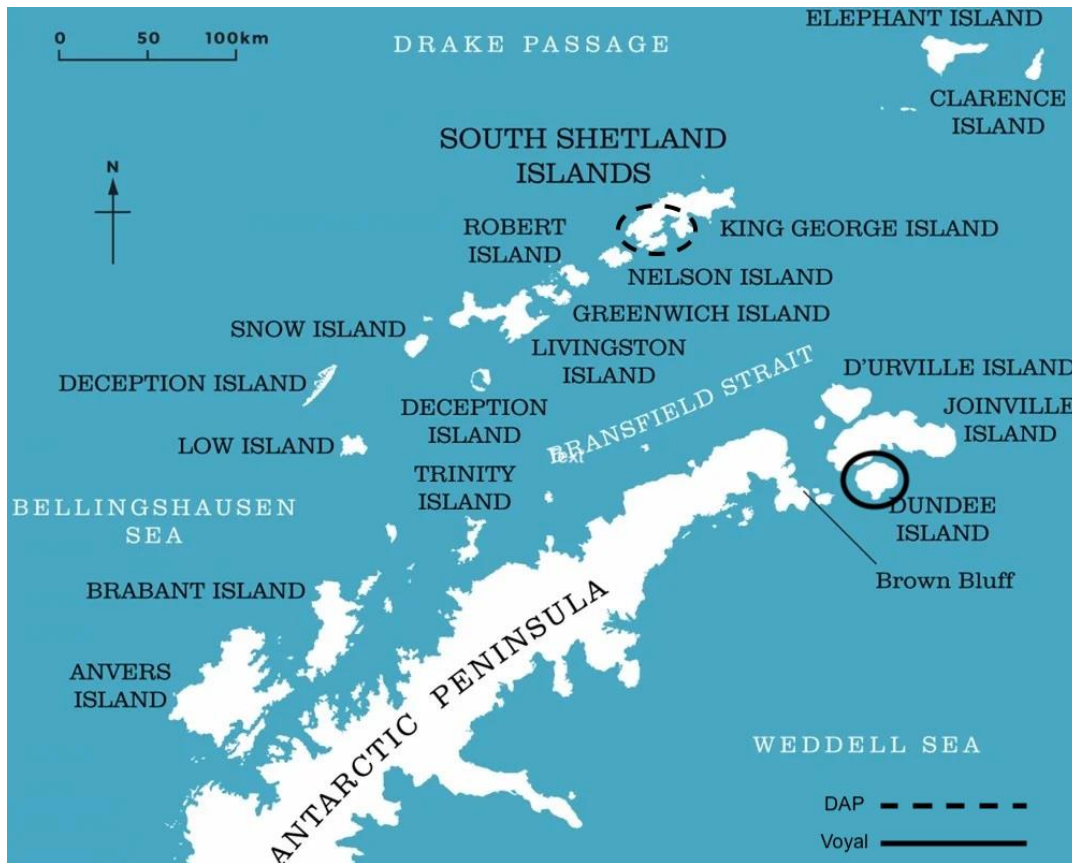


Figure 15: DAP Antarctica Area of Operation for Air/Land Tourism



2.3 Antarctic Peninsula Air/Land Operator Programs and Activities Day

For the Air/Land activities in the South Shetland Islands, clients fly from Punta Arenas, Chile, to King George Island. Once there, depending on the weather and flight restrictions, clients are offered activities such as visiting an elephant seal haul-out on foot or taking DAP's small boat ride to a nearby glacier.

Table 3 depicts IAATO Antarctic Peninsula Air/Land Programs and Participant Numbers (clients) 2021 to the Present.

Table 3: IAATO Antarctic Peninsula Air/Land Programs and Participant Numbers (clients) for 2021-22 to 2025-26 (Note: some participants may take part in several programs)

| Antarctic Peninsula Air/Land Operator | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 |
|---------------------------------------|---------|---------|---------|---------|---------|
| Day Trips King George Island | 6 | 68 | 44 | 60 | 79 |

3.0 Preliminary Estimate of Planned Activities for the 2026-27 Season

Preliminary estimates, found in Appendix 2, for the 2026-27 season are as of 10 April 2026. These estimates represent the anticipated operating scenario for the 2026-27 season.

4.0 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 how these data are collected, categorised, and stored, with a database which now encompasses more detailed activity categories and updates to site region details. IAATO members have agreed to enhance the IAATO database, creating a specific sector for Deep Field and Air Operators. This will help capture data specific to DF&AO.

Until recently, data collation was done manually across all IAATO Operators. Advances in technology and data analysis capability have allowed large data sets to be analysed more effectively and quickly than previously possible. This, along with comprehensive reviews of historical datasets, has 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>

Appendices:

- Appendix 1: Overview of Deep Field and Air Operators Antarctic Tourism 2025-26
- Appendix 2: Preliminary Estimate of Deep Field and Air Operators Antarctic Tourism 2026-27

Appendix 1: Overview of Deep Field and Air Operators Antarctic Tourism 2025-26

SUMMARY OF ACTUALS for 2025-26 SEASON (As of April 10, 2026)

| IAATO Members Deep-Field - 2025-2026 | | |
|---|----------------------------|---------------------------|
| Operator / Charterer | Competent Authority | Total # of clients |
| Intracontinental | | |
| Antarctic Logistics & Expeditions LLC | United States | 315 |
| Arctic Trucks | United Kingdom | 0 - Science Support Only |
| Ultima Antarctic Expeditions | Republic of South Africa | 175 |
| White Desert Ltd | United Kingdom | 537 |
| Air/Land | | |
| DAP Antarctica | Chile | 79 |
| | Totals: | 1106 |

Appendix 2: Preliminary Estimates of Deep Field and Air Antarctic Tourism 2026-27

SUMMARY OF ESTIMATES for 2026-27 SEASON (As of April 10, 2026)

| IAATO Members Deep-Field - 2025-26 | | |
|---|----------------------------|---------------------------|
| Operator / Charterer | Competent Authority | Total # of clients |
| Intracontinental | | |
| Antarctic Logistics & Expeditions LLC | United States | 400 |
| Arctic Trucks | United Kingdom | 12 |
| Ultima Antarctic Expeditions | Republic of South Africa | 320 |
| White Desert Ltd | United Kingdom | 580 |
| Air/Land | | |
| DAP Antarctica | Chile | 80 |
| VOYAL | Argentina | 100 |
| | Totals: | 1492 |