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ANNUAL REPORT

Entry of visitors to the protected areas of Galapagos





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protected areas of
Galapagos

The Directorate of the Galapagos National Park presents the annual report of visitors in 2022 with results of the processing of the entrance fee to the protected areas of Galapagos and other records.

This document contains the most relevant indicators for 2022. This report has been prepared by the Directorate of Public Use of the DGNP.

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TOURIST ARRIVALS TO GALAPAGOS 2022



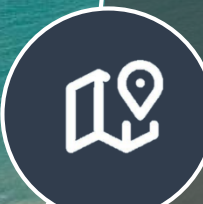
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Tourist arrivals to Galapagos

267.688

Tourist arrivals to Galapagos in 2022

+96%

Growth in total arrivals compared to 2021

+168%

Growth in foreign arrivals compared to 2021

+49%

Growth in domestic arrivals compared to 2021

Tourist arrivals

In 2022 the entry of 267,688 tourists¹ to the Galapagos was recorded. Of these, 54% correspond to foreigners (145,000 tourists), compared to 46% of national tourist arrivals (122,000 tourists).

Regarding the gateway to Galapagos, 72% of visitors arrived through the airport on Baltra Island and 28% through San Cristobal airport.

In relation to foreign tourist arrivals, the growth in 2022 compared to 2021 is +168% (+91 thousand tourists) and for nationals it is +49% (+40 thousand tourists).

Arrivals by origin of tourists in 2022

145.445

54%
Foreigns



122.243

46%
Nationals

Arrivals by airport of entry in 2022

191.435

72%
Baltra



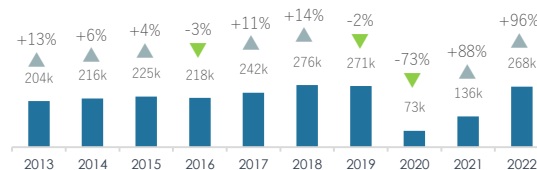
76.186

28%
San Cristóbal

The last 10 years

Between 2013 and 2022, the compound annual growth rate (CAGR) of tourist arrivals to Galapagos was 3.0%. The rate for foreign arrivals was 1.07% while for domestic arrivals it was 6.01%.

Tourist arrivals to Galapagos 2013-2022
Year on year growth (%) and total arrivals in thousands (k) are shown



Compound annual growth rate 2013-2022: +3.04%

+3,04% TACC of total tourist arrivals 2013-2022

+6,01% TACC of national tourist arrivals 2013-2022

+1,07% TACC of foreign tourist arrivals 2013-2022

¹ This figure includes all those visitors to the islands who entered under the migratory category of "tourists" and who have additionally paid the protected area use tax.



TOURIST ARRIVALS TO GALAPAGOS

Variation (%) 2022 vs 2019

01

Tourist arrivals to the islands in 2022 decreased by 1% compared to 2019 (- 3,550 tourists), the year before the COVID-19 pandemic.

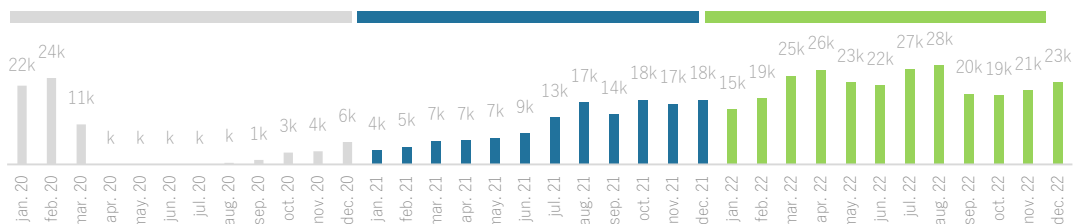
02

In relation to foreign arrivals, the reduction of the market compared to 2019 was 20% (-37,056 tourists).

03

For domestic arrivals it represented an increase of 38% (+33,506 tourists).

Tourist arrivals per month, per year and year-on-year growth between 2020 - 2022



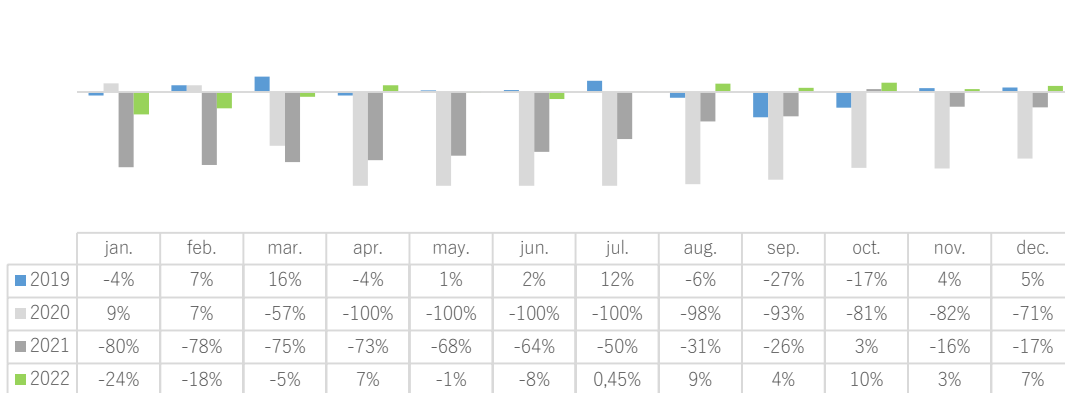
Year-on-year growth

Compared to tourist arrivals in 2021, 2022 reports a growth of +96% (+131 thousand tourists).

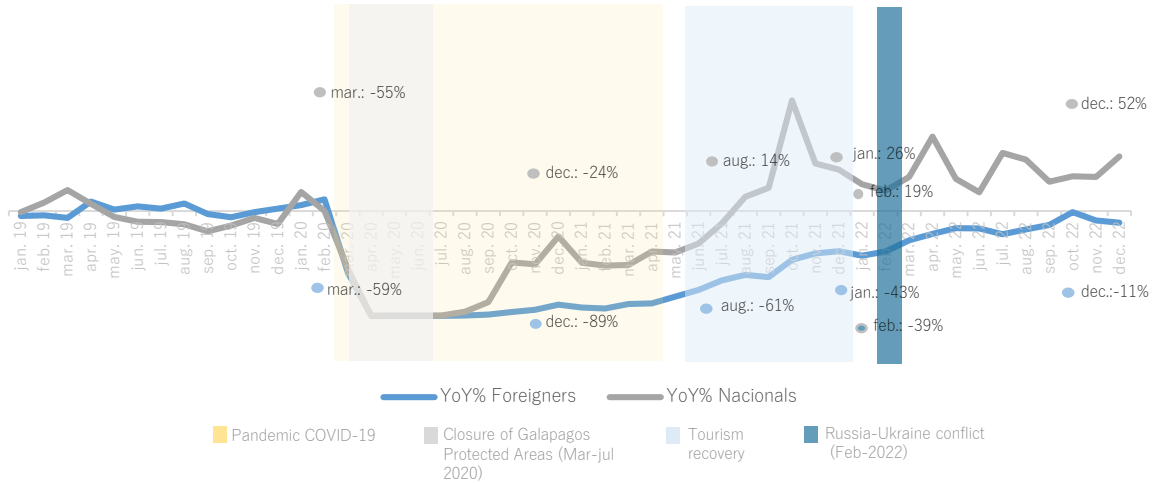
The months with the greatest growth in arrivals to Galapagos were March, April, July, August and December.

In 2022, the month of April recorded an increase of 7%, August 9% and October 10% over the same period in 2019. From the second half of the year onwards there was a greater increase in tourist arrivals compared to pre-pandemic levels.

Year-on-year growth (YoY%) of monthly tourist arrivals for 2022/2019 and 2021/2019



Variation (%) of monthly arrivals to Galapagos from January 2019 to December 2022
The variation shows the difference in arrivals in relation to the same month in the previous year.



Galapagos tourism recovers

By the end of 2022, international tourism reached 80% of pre-pandemic levels. According to Zurab Pololikashvili, UNWTO Secretary-General: "Tourism continues to recover steadily, despite various challenges of both geopolitical and economic nature..."

In 2022, more than 145 thousand foreign tourists travelled to the Galapagos Islands, this figure was more than double that of 2021 (+54 thousand tourists) but still 20% less than in 2019.

UNWTO foresees a good year for the sector, even if facing several challenges, such as the economic situation and continued geopolitical uncertainty (UNWTO, 2022).

Tourists are expected to increasingly seek more value for money and closer travel in response to the adverse economic context (UNWTO, 2022).

While international tourism is stabilising, domestic tourism is reaching and surpassing pre-pandemic levels, favouring the recovery of the tourism sector in the islands. The economic conditions have undoubtedly influenced tourists to choose travel options closer to home, with lower spending and shorter stays.

Year-round domestic tourist arrivals are above pre-pandemic levels. Monthly arrivals were 26% above 2019 levels in January 2022 and had reached 52% by December.

Tourist arrivals by country and market share in 2022, TOP 10



Country	Tourist arrivals 2022 in thousands (k)	Market share	Market share International
Ecuador	121k	46%	N/A
United States	77k	29%	52%
United Kingdom	9k	3%	6%
Germany	9k	3%	6%
Canada	7k	3%	5%
France	5k	2%	3%
Spain	4k	1%	3%
Israel	4k	1%	2%
Netherlands	3k	1%	2%
Switzerland	3k	1%	2%

* The remaining 10% is accounted for by 106 other countries.

Emitting markets

75% of the market share of tourist arrivals to Galapagos is in two countries: Ecuador and the United States. In terms of foreign markets alone, the United States accounts for 52% of tourist arrivals, followed by the United Kingdom and Germany with 6%, Canada 5% and France with 3%.

Between 2021 and 2022, significant increases were recorded in the main source markets. Some countries that decreased their market share include France, Spain, Switzerland, Poland, Mexico, Colombia and Russia, while Canada, Israel, the United Kingdom and the Netherlands increased.

Ranking 2021	Country	Ranking 2022	Country
1	Ecuador	1	Ecuador
2	United States	2	United States
3	France	3	United Kingdom
4	Germany	4	Germany
5	Spain	5	Canada
6	Canada	6	France
7	Switzerland	7	Spain
8	Poland	8	Israel
9	Mexico	9	Netherlands
10	Israel	10	Switzerland
11	Colombia	11	Denmark
12	United Kingdom	12	Italy
13	Netherlands	13	Brazil
14	Russia	14	Colombia
15	Belgium	15	Belgium

Ecuador 1

Arrivals 2022: **121k**
 % Market: 45%
 Average age: 37 years old
 Median stay!: 5 days
 Majority accommodation type!: 87% onshore

United States 2

Arrivals 2022: **77k**
 % Market: 29%
 Average age: 48 years old
 Median stay!: 6 days
 Majority accommodation type!: 70% on board

United Kingdom 3

Arrivals 2022: **9k**
 % Market: 3%
 Average age: 46 years old
 Median stay!: 8 days
 Majority accommodation type!: 68% on board

Germany 4

Arrivals 2022: **9k**
 % Market: 3%
 Average age: 45 years old
 Median stay!: 9 days
 Majority accommodation type!: 64% onshore

Canada 5

Arrivals 2022: **7k**
 % Market: 3%
 Average age: 49 years old
 Median stay!: 7 days
 Majority accommodation type!: 60% on board

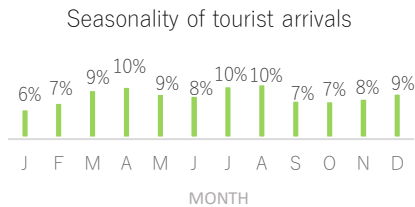
1 Galapagos Tourism Observatory, Tourism Statistics 2022 - Semi-Annual Report January-June, Ministry of Tourism of Ecuador, Galapagos Ecuador, taken from the Pre-Registration and Registration Base - Governing Council of the Special Regime of Galapagos.

Travel profile of the main markets in Galapagos (continued)

	France	Spain	Israel	Netherlands	Switzerland
Arrivals 2022:	5K	4k	4k	3k	3k
% of market:	3%	3%	2%	2%	2%
Average age:	48 years old	40 years old	42 years old	42 years old	35 years old
Median length of stay:	9 days	N/A	7 days	9 days	9 days
Majority accommodation type:	55% onshore	N/A	87% onshore	56% onshore	57% onshore

Seasonality of arrivals

March, April, July, July, August and December are the months with the greatest influx of tourists to Galapagos. January, February, September and October were the months with the lowest tourist arrivals.



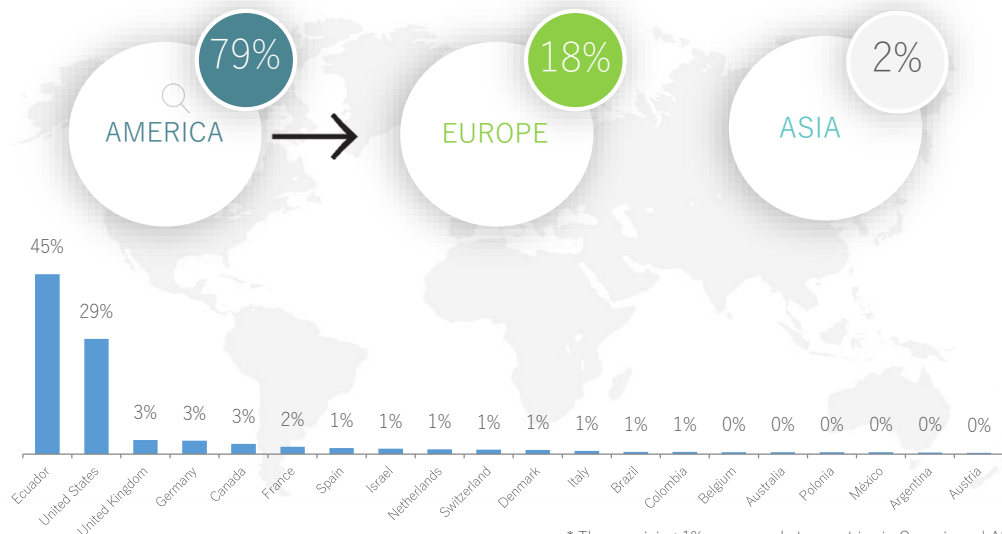
The seasonality of travel varies depending on the issuing countries. In the case of northern hemisphere issuing countries such as the United States, their trips to Galapagos are concentrated in June, July and December, while Canada recorded a greater influx in the months of March, April, October and November.

In Europe, France, Spain, the Netherlands and Switzerland concentrate their trips in the middle of the year, Germany, the United Kingdom and the Netherlands in the months of October and November.

Seasonality of tourist arrivals TOP 10 issuing countries to Galapagos



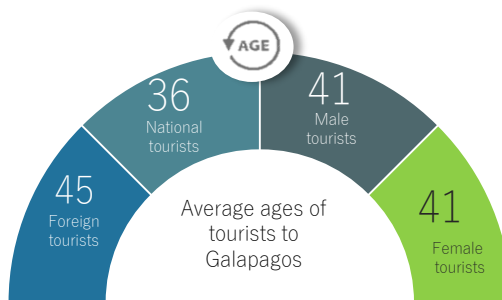
Market share of the top 20 tourist sending countries to Galapagos to 2022



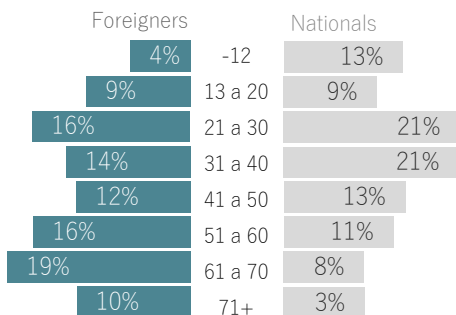
* The remaining 1% corresponds to countries in Oceania and Africa.

Age of tourists to Galapagos

The average age of tourists to Galapagos is 41 years. The country with the youngest visitors is Ecuador (average age 36). Foreigners exceed the average age of nationals by 9 years (45 years on average). The average age of male and female tourists is 41 years.



Age range of tourists by origin



In age ranges, foreign visitors have a higher concentration of tourists aged over 41 years, while nationals are younger than 41 years.

ON VISITOR SITES CLOSE TO POPULATION CENTRES:

01

SANTA CRUZ

In Santa Cruz, 35% of visits to nearby sites were concentrated at Tortuga Bay beach.

02

SAN CRISTOBAL

The Gianni Arismendy Environmental Interpretation Centre registered around 55,000 visits, which represented 22% of the visits on the island of San Cristobal.

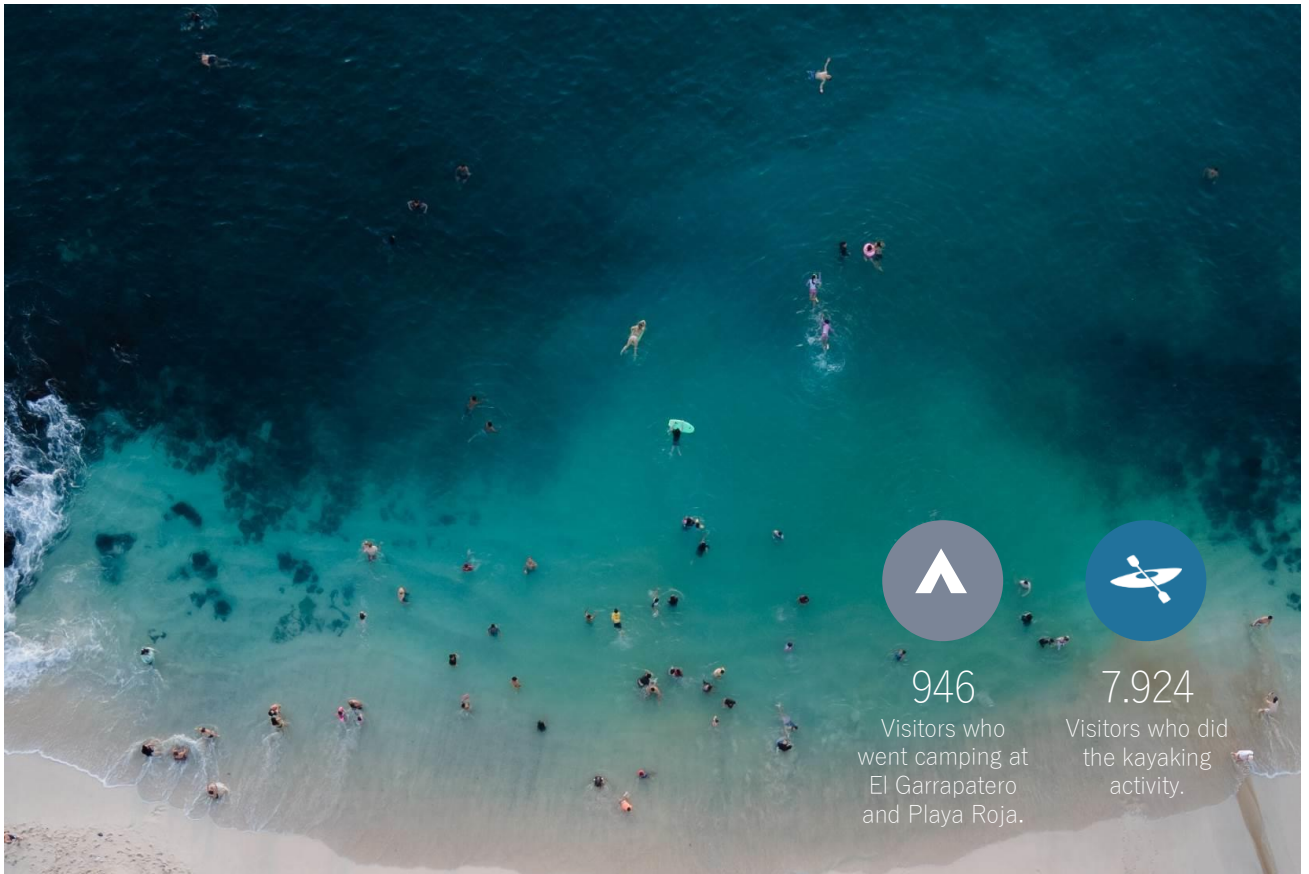
03

ISABELA

On Isabela, the Arnaldo Tupiza Breeding Centre accounted for 31% of visits.



It is important to note that a visitor can go to several sites during their stay in Galapagos.



Nearby visitor sites: Santa Cruz

In 2022 around 439,000 visits were recorded at the sites near the population centres of Santa Cruz island.

The site with the most visits was Tortuga Bay, with more than 153 thousand visitors, most of whom (48%) were nationals, followed by the Turtle Route-Fausto Llerena Breeding Centre with around 130 thousand visitors, most of whom were foreigners (54%).



Records in visitor sites near the population centres of Santa Cruz Island.



Site	Foreigners	Nationals	Locals	Totals
1. Tortuga Bay	54.577	73.997	24.798	153.372
2. Turtle Route-Fausto Llerena Breeding Centre	69.982	55.033	4.375	129.390
3. Las Grietas	29.318	80.049	18.998	128.365
4. Garrapatero Beach	4.534	13.083	10.062	27.679

Nearby visitor sites: San Cristobal.

In 2022, more than 252 thousand visits were recorded at the sites near the population centres of San Cristobal Island.

The sites with the most visits were CIAGA, with more than 55 thousand visitors, the majority of which (52%) were foreigners, followed by Cerro Tijeretas with 54 thousand visits, the majority of which were nationals (51%).



310

Visitors went camping in Puerto Chino, Manglecito and Puerto Grande.



977

Visitors did the kayaking activity.



Visitor sites near the population centres of San Cristobal Island.

Site	Foreigners	Nationals	Locals	Totals
1. CIAGA	28.725	24.398	2.301	55.424
2. Cerro Tijeretas	23.741	27.891	3.185	54.817
3. CCTTDR	21.474	23.753	2.640	47.867
4. Punta Carola	16.773	21.850	2.764	41.387
5. La Lobería	8.940	10.935	3.960	23.835
6. Puerto Chino	5.541	10.718	3.213	19.472
7. Baquerizo Beach	4.508	4.444	477	9.429

*CIAGA - Gianni Arismendy Environmental Interpretation Centre.

**CCTTDR - David Rodríguez Land Tortoise Breeding Centre .



Visitor sites near Isabela

In 2022, more than 107,000 visits were registered at sites near the island's population centres Isabela.

The site with the most visits was the Arnaldo Tupiza Breeding Centre, with more than 33,000 visitors, the majority of whom (75%) were foreigners, followed by Circuito Muro with more than 29 thousand visitors, the majority of whom were also foreigners (64%).

Records in visitor sites near the population centres of Isabela Island.



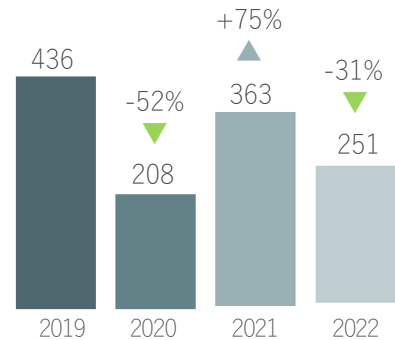
Site	Foreigners	Nationals	Locals	Totals
1. Arnaldo Tupiza Breeding Center	24.742	7.644	663	33.049
2. Circuito Muro	18.752	5.592	5.015	29.359
3. Sierra Negra Volcano-Chico volcano	26.022	1.653	627	28.302
4. Concha de Perla	8.837	3.769	2.517	15.123
5. Minas de Azufre	773	292	774	1.839



Visits on board private non-commercial vessels.

In 2022, there were 251 visitors on board private non-commercial boats that visited the tourist sites of the protected areas of Galapagos.

Arrival of visitors aboard private boats:
Comparative year 2019-2022



Comparing these visits with those of 2021 there was a reduction of 31 in the number of visitors and 42 in relation to 2019.

5

The average number of passengers on these vessels was 5 visitors.



The average number of days of passenger visits was 8 days.

35%

Correspond to English flag vessels.

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areas of Galapagos

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