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ONE YEAR AFTER THE ADJUSTMENT OF GALAPAGOS
ENTRANCE FEES: ARE THERE CHANGES IN TOURIST
DEMAND?

Carlos Silva-Zambrano, Claudia Aravena, Eoin
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Keywords: public attitudes, individual preferences,
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JEL: H23, Q26, Q57

Policy Brief

One year after the adjustment of Galápagos entrance fees: Are there changes in tourist demand?

Carlos Silva-Zambrano^{1, 2, *}, Claudia Aravena¹, Eoin McLaughlin¹, and Cesar Viteri²

¹Heriot-Watt University, Edinburgh, United Kingdom

²Charles Darwin Foundation, Galapagos Islands, Ecuador

*Contact: cas2002@hw.ac.uk

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Abstract

The Galápagos Islands face the challenge of conserving their biodiversity while moving toward a more sustainable tourism model. In August 2024, after 24 years without changes, the entrance fee for the Galápagos National Park and Marine Reserve was updated: from USD 100 to USD 200 for foreign visitors and from USD 6 to USD 30 for Ecuadorians. Comparing surveys conducted in 2024 and 2025, this policy brief examines how attitudes, spending, and satisfaction of tourists have evolved over time. Results show a decline in the share of visitors who were aware of the entrance fee adjustment, along with growing support for the measure among international tourists. Average spending and satisfaction levels remained stable for both domestic and foreign visitors, indicating that the adjustment did not affect tourism demand at the aggregate level. The findings highlight the need to strengthen participatory processes for co-creating and redesigning site-management plans; identify investment priorities for maintaining, renovating, and improving the accessibility of visit sites; and ensure transparent and efficient management of collected revenues to facilitate the timely implementation of conservation, ecological restoration, and local development actions.

Keywords: public attitudes, individual preferences, tourism management, protected areas.

JEL Classification: H23, Q26, Q57.

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1. Context and Background

The Galápagos Islands face the challenge of conserving their unique biodiversity while moving toward a more sustainable tourism model. In the first half of 2025, the Galápagos National Park (GNP) received 145,655 visitors, 2% more than during the same period in 2024, with a market share similar to the pre-pandemic period: 65% international visitors and 35% domestic (Ecuadorian) tourists. Although tourism growth is more moderate than during the 2023 boom, it continues to place pressure on essential services such as water, energy, and waste management. These pressures threaten ecosystem integrity and highlight the need for robust financial mechanisms to support sanitation, conservation, and ecological restoration (MAATE, DPNG, 2025).

In August 2024, the entrance fee to the Galápagos National Park and Marine Reserve was increased after 24 years without changes. The fee for international visitors increased from USD 100 to USD 200, while the fee for Ecuadorian tourists rose from USD 6 to USD 30. This adjustment aimed to strengthen conservation efforts, regulate tourism flows, and fund the management of protected areas, invasive species control, and environmental education (MAATE, DPNG, 2025). The measure also responded to UNESCO recommendations urging the stabilization of tourism growth and the protection of biodiversity.

The first policy brief of the *Hidden Barriers to Conservation* project, through surveys conducted among visitors when leaving the islands, examined tourist perceptions before and immediately after the fee change, finding strong support among international visitors and more mixed views among Ecuadorians (Silva-Zambrano et al., 2025a). One year later, the present analysis addresses two key questions: How have tourists' perceptions and attitudes toward the fee adjustment evolved? Has visitor spending or the quality of their experience changed during this period? To answer these questions, we compare the results from surveys conducted in June 2025 with those collected in August 2024, identifying trends relevant to the management of nature-based tourism and public policy design.

2. Data and Methodology

This analysis is based on a total of 607 surveys, comparing 227 questionnaires collected in August 2024 (58% international visitors and 42% domestic visitors) with 380 surveys collected in June 2025 (43% international and 57% domestic visitors). Two local volunteers conducted face-to-face surveys among tourists in the departure area of Baltra airport. Considering the respective sample sizes, we conducted descriptive analyses and statistical tests (Welch's t-test and chi-square tests) to identify significant differences between the two periods.

The results indicate that the general profile of visitors, including educational attainment, length of stay, type of accommodation, and group composition—remained statistically similar across both periods, allowing comparability between samples. The shift in the proportion of international and domestic visitors between the two periods is addressed by conducting separate analyses for each group.

3. Key Findings

The study reveals a significant decline in awareness of the change in Galapagos entrance fees ten months after its implementation. In August 2024, 55% of international visitors were aware of the measure, compared with 35% in June 2025 ($p < 0.01$). Among domestic visitors, awareness fell from 66% to 44% ($p < 0.01$). Attitudes toward the fee increase evolved differently across groups.

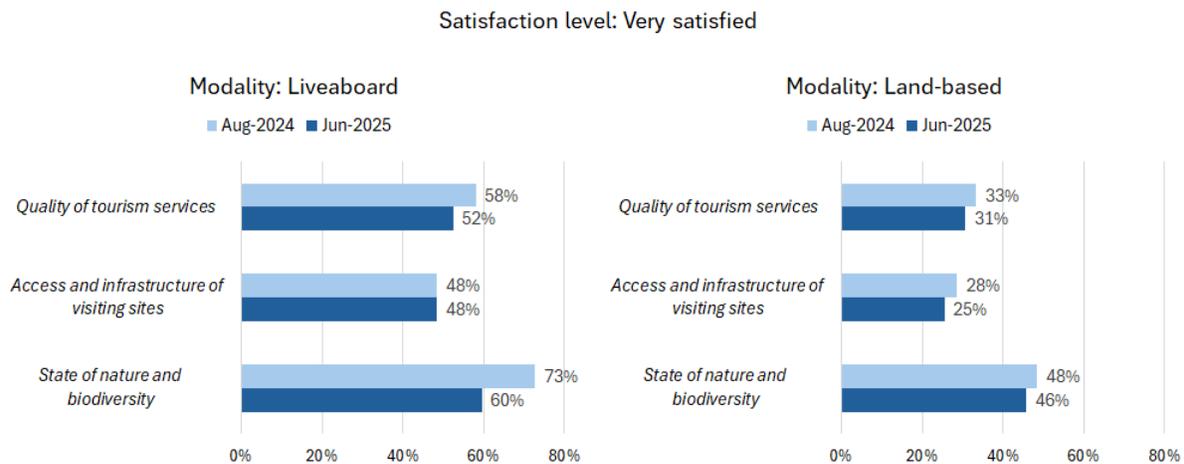
Support among international tourists rose from 49% to 61% ($p = 0.027$), whereas support among domestic visitors showed no statistically significant change (34% to 26%, $p = 0.176$). These results indicate growing international endorsement but some level of opposition among national tourists, the latter associated with perceptions of inequity in the new entrance fee structure and limited information on how the collected revenues are used.

Average total expenditure per travel party (excluding airfare) did not show statistically significant changes between periods (Table 1). For international visitors, whose typical stay is six days, average spending decreased from USD 6,342 ($\pm 9,069$) in August 2024 to USD 5,737 ($\pm 9,029$) in June 2025. For domestic visitors, who typically stay five days, spending remained stable at approximately USD 1,751 ($\pm 1,970$) in 2024 and USD 1,491 ($\pm 1,202$) in 2025. Median spending remained constant at USD 3,000 for international visitors and USD 1,000 for domestic visitors. These results suggest that the entrance fee adjustment has not discouraged visits or significantly affected the local economy at an aggregate level. However, sectors highly dependent on land-based domestic tourism may experience negative impacts due to shifts in the composition of demand: for example, if the flow of domestic tourists declines.

Table 1: Total expenditure per family group (USD per group/visit)

USD	Foreign tourists			Domestic tourists		
	Aug-2024	Jun-2025	Welch's Test	Aug-2024	Jun-2025	Welch's Test
Mean	6342	5737	$p = 0,60$	1751	1491	$p = 0,17$
(S.D.)	(± 9069)	(± 9029)		(± 1970)	(± 1202)	
Median	3000	3000		1000	1000	

Figure 1: Level of satisfaction by visit modality



Visitor satisfaction with the state of Galápagos biodiversity, tourism services, and infrastructure at visit sites remains high overall, though it varies by visit modality (Figure 1). Between 2024 and 2025, 46% to 48% of land-based visitors reported being very satisfied with the state of nature and biodiversity, whereas among liveaboard visitors this share declined from 73% to 60% ($p = 0.08$). Regarding tourism services, 31% of land-based visitors and 52% of liveaboard visitors reported being very satisfied in 2025. The lowest ratings were recorded for access and infrastructure at visit sites:

25% among land-based tourists and 48% among liveaboard tourists, reflecting long-standing lack of investment in maintenance and renovations. Strengthening this dimension is essential to ensure visitor safety and improve the quality of their experience, while also protecting ecosystems within and around visit sites. These findings are consistent with another study identifying investment in improving visit sites, alongside drinking water systems and species conservation, as top priorities for Galápagos residents for the allocation of tourism fee revenues (Silva-Zambrano et al., 2025b). Reallocating funds toward these areas substantially increases public support for the fee adjustment.

4. Policy Implications

The adjustment of the Galápagos National Park entrance fee strengthens financial sustainability without significantly affecting demand at aggregate level or overall tourist spending. The willingness to pay among international visitors, combined with their increasingly positive attitudes toward the updated fee, highlights the potential of international tourism as a growing source of funding. Although domestic tourists show attitudes that combine both support and opposition toward the fee adjustment, they remain an important and relatively stable market segment for the archipelago.

Stable levels of expenditure and satisfaction suggest that visitors continue to perceive their experience in the Galápagos as of *high value*, allowing the protected areas managers to transition toward a more sustainable tourism model without compromising the competitiveness of the destination.

Policy recommendations

- **Continuous monitoring:** Establish and consolidate a permanent monitoring system to assess visitor profiles, perceptions, and spending patterns across different seasons. This will help identify changes in the demand composition or visitor experience over time. Periodic studies of potential demand in key points of origin such as major cities in mainland Ecuador are also recommended.
- **Co-creation and intersectoral participation:** Engage tourism operators, naturalist guides, visitors, residents, and public institutions in the co-creation and redesign of management plans for visit sites, including strategies to strengthen compliance with visitation rules and to reduce ecological impacts on protected habitats and species.
- **Access and infrastructure:** Identify priority investments for maintenance, renovation and improved accessibility at visit sites, including those near populated areas and remote zones. Enhancing infrastructure will help protect ecosystems while ensuring safe, high-quality, and responsible tourism experiences for both visitors and local residents.
- **Efficient management and use of revenues:** Maintain transparent management and clear communication about the allocation of collected revenues. Reduce gaps in budget availability, which can currently extend up to six months (MAATE–DPNG, 2025), to allow for long-term implementation and the timely execution of conservation, ecological restoration, and local development actions, funded in part by the revenues generated through the increase in entrance fees.

5. Conclusions

One year after the adjustment of the entrance fee to the Galápagos National Park, evidence suggests that this policy change can strengthen the archipelago's financial sustainability without compromising its tourism appeal or the health of the systems that host tourism operations and related activities. Furthermore, it provides financial alternatives to cover the high costs of maintaining these operations within healthy systems which, in turn, require waste management, water treatment, sustainable mobility, and improved health and education services. To maximize social and environmental benefits, it is essential to consolidate participatory governance mechanisms and co-creation spaces, identify investment priorities, and ensure transparent and efficient resource management. An integrated approach that addresses conservation challenges and local development needs, coupled with institutional accountability and social participation, will allow tourism to be a strategic ally for the long-term sustainable management of the Galápagos Islands, rather than the cause of irreparable damage.

Note: Full descriptive statistics from the tourist surveys are presented in the Appendix.

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A Appendix

This Appendix presents a summary of the descriptive results obtained from the tourist surveys, highlighting key aspects of visitor profiles, preferences, perceptions, and willingness to pay.

Sample Characteristics and Tourist Profile

Table A.1 reports the number of surveys conducted by nationality and data-collection period. A total of 607 surveys were administered in person by two local volunteers at the Baltra airport. In August 2024, 227 tourists were surveyed (43% foreign and 57% domestic), while in June 2025, 380 tourists were surveyed (58% foreign and 42% domestic).

Table A.1: Sample size by nationality and survey collection period

Survey collection period	August 2024	June 2025	Total
Foreign tourists	97	220	317
Domestic tourists	130	160	290
Total	227	380	607

Table A.2 presents the sociodemographic characteristics of foreign visitors. No statistically significant differences were observed between periods in gender, visit modality, age, education level, occupational sector, or income. Table A.3 shows the sociodemographic characteristics of domestic visitors. No significant differences were found between periods in gender, visit modality, or income. However, at the 5% confidence level, the null hypothesis of equality between periods is rejected for education and occupational sector.

Table A.2: Demographic characteristics – Foreign Tourists

Demographic characteristic	Foreign Tourists		Test
	Aug-2024	Jun-2025	
Gender			
Male	45%	46%	p = 0,90
Female	55%	54%	
Visit modality			
Land-based	61%	60%	p = 0,83
Liveaboard	39%	41%	
Age			
18 - 24	9%	5%	p = 0,26
25 - 29	16%	12%	
30 - 39	20%	24%	
40 - 49	14%	21%	
50 - 64	29%	31%	
65 or older	11%	7%	
Education level			
Secondary or lower	6%	11%	p = 0,15
Higher education	55%	89%	
Occupation sector			
Private sector	59%	58%	p = 0,87
Public sector	22%	25%	
Retired	12%	11%	
Other (students, unemployed)	7%	6%	
Monthly income USD			
Mean (S.D.)	17.703 (± 33.650)	15.839 (± 33.765)	p = 0,66
Median	4000	4000	
Observations	n = 97	n = 220	N = 317

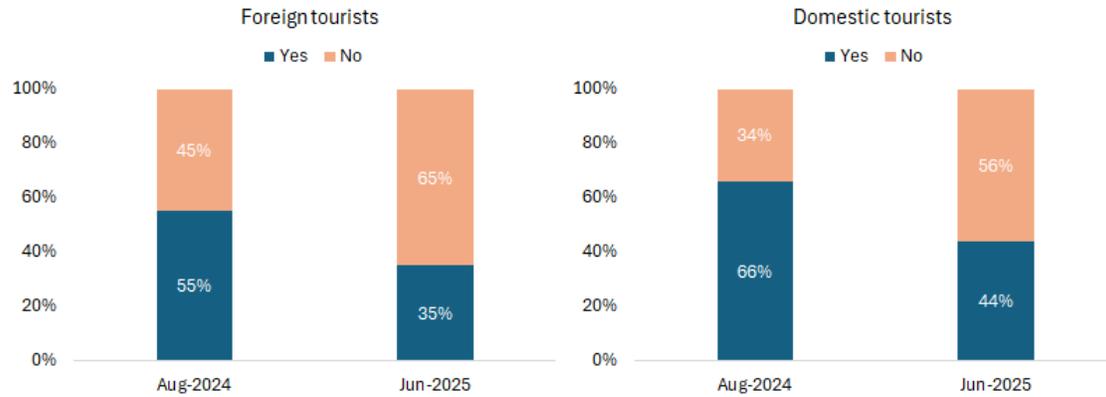
Table A.3: Demographic characteristics – Domestic Tourists

Demographic characteristics	Domestic tourists		
	Aug-2024	Jun-2025	Test
Gender			
Male	49%	56%	p = 0,23
Female	52%	44%	
Visit modality			
Land-based	82%	76%	p = 0,29
Liveaboard	19%	24%	
Age			
18 - 24	18%	11%	p = 0,35
25 - 29	22%	23%	
30 - 39	26%	36%	
40 - 49	18%	18%	
50 - 64	11%	11%	
65 or older	4%	1%	
Education level			
Secondary or lower	24%	13%	p = 0,01
Higher education	76%	88%	
Occupation sector			
Private sector	54%	67%	p = 0,01
Public sector	22%	23%	
Retired	4%	1%	
Other (students, unemployed)	20%	10%	
Monthly income USD			
Mean (S.D.)	1638 (\pm 3972)	3048 (\pm 10.118)	p = 0,14
Median	750	1250)	
Observations	n = 130	n = 160	N = 290

Awareness and Attitudes Toward the Entrance Fee Adjustment

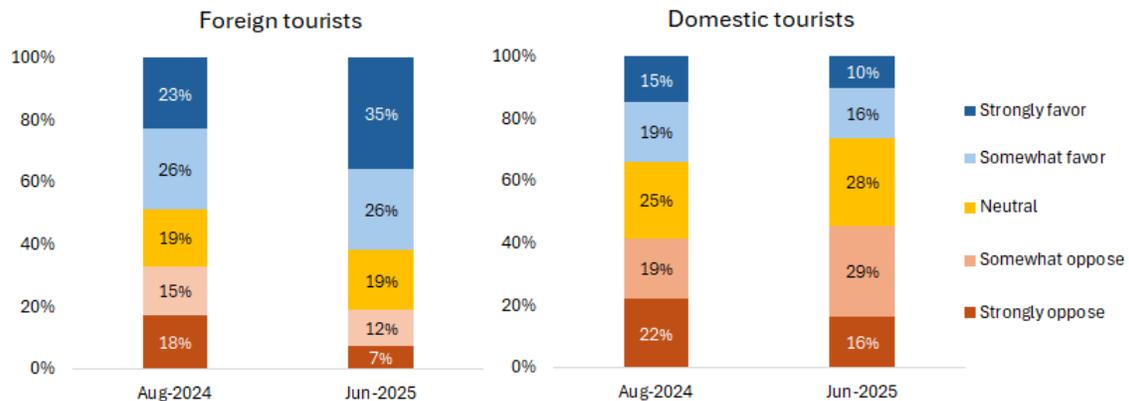
Figure A.1 shows the share of tourists who were aware of the entry fee adjustment at the end of their visit to the Galápagos. Among foreign visitors, 55% knew about the measure in August 2024, compared to 35% in June 2025. Among domestic visitors, awareness decreased from 66% to 44% over the same period.

Figure A.1: Awareness of the Entrance Fee Adjustment



Regarding attitudes toward the entrance fee adjustment, in August 2024, 23% of foreign visitors reported being fully in favor of the measure; this proportion increased significantly to 35% in June 2025 (Fig. A.2). Among domestic visitors, the share of respondents with a negative attitude (somewhat or totally opposed) remained stable (41% in 2024 vs. 45% in 2025), with no statistically significant differences

Figure A.2: Attitudes toward the entrance fee adjustment



Number of visits, length of stay, group size, and expenditure

Table A.4 reports the number of previous visits tourists had made to the Galápagos Islands. Between 84% and 88% of foreign visitors indicated that this was their first time visiting. Among national tourists, 62% to 64% were first-time visitors, while 21% to 22% were on their second visit, and the remainder had visited three or more times. No statistically significant differences were observed across survey periods.

Table A.4: Number of times visiting Galapagos, including current visit

Number of visits	Foreign Tourists		Domestic Tourists	
	Aug-2024	Jun-2025	Aug-2024	Jun-2025
	1 time (first time)	88%	84%	62%
2 times	10%	13%	22%	21%
3 times	1%	6%	7%	6%
4 times or more	1%	5%	9%	9%

Figure A.3 and Table A.5 present the average length of stay. Foreign tourists reported an average stay of 7.3 days, whereas national tourists stayed 6.5 days in August 2024 and 7.2 days in June 2025. This difference is not statistically significant.

Table A.5: Length of stay in Galapagos

Number of days	Foreign tourists			Domestic tourists		
	Aug-2024	Jun-2025	Test	Aug-2024	Jun-2025	Test
Mean	7,38	7,34	p = 0,93	6,5	7,2	p = 0,44
(S.D.)	(±4,0)	(±4,2)		(±5,9)	(±8,2)	
Median	6	6.5		5	5	

Figure A.3: Length of stay in the Galapagos

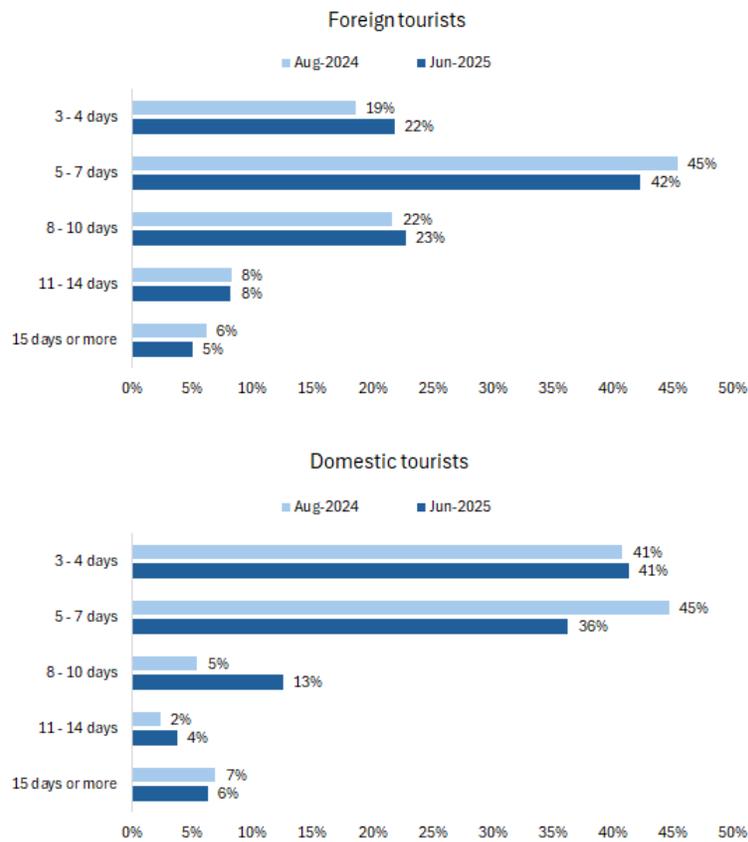


Figure A.4 and Table A.6 summarize the average group size by nationality and period. Among foreign tourists, the average group size was 3.19 people in August 2024 and 3.76 in June 2025 ($p = 0.13$). For national tourists, the average group size decreased from 4.17 to 3.81 ($p = 0.21$). Such differences are not statistically significant. The median values remain stable (2 for foreigners and between 3 and 4 for nationals), indicating consistent typical family or travel group sizes.

Figure A.4: Travel group size (current visit)

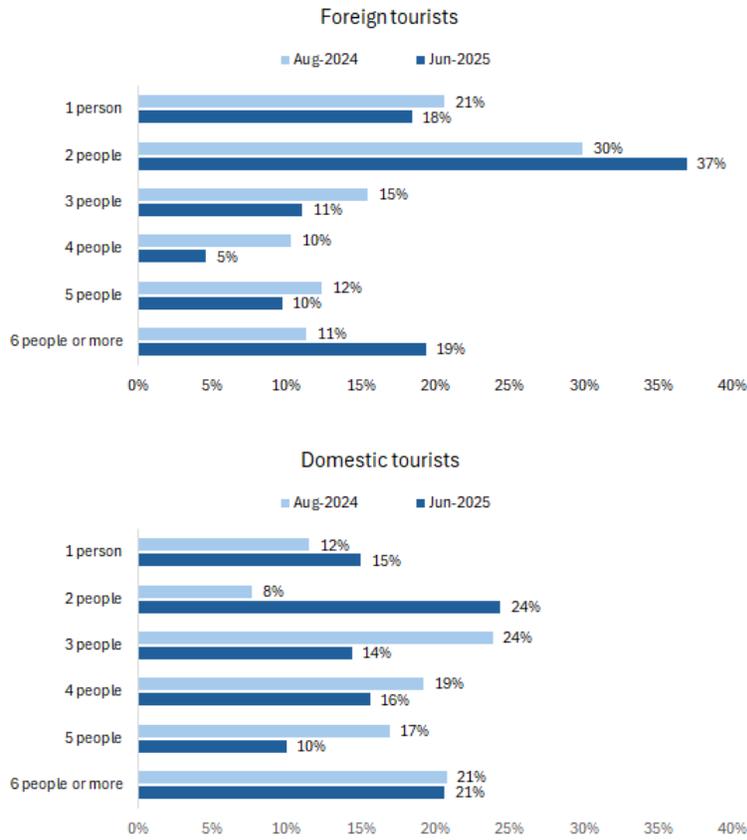


Table A.6: Travel group size (current visit)

Number of persons	Foreign tourists			Domestic tourists		
	Aug-2024	Jun-2025	Test	Aug-2024	Jun-2025	Test
Mean	3,19	3,76	$p = 0,13$	4,17	3,81	$p = 0,21$
(S.D.)	(±2,18)	(±3,45)		(±2,27)	(±2,6)	
Median	2	2		4	3	

Table A.7 presents the average total expenditure per group by visit modality. Overall, foreign tourists' spending decreased slightly from USD 6,342 to USD 5,737, while national tourists' spending fell from USD 1,751 to USD 1,491; neither change is statistically significant. When disaggregated by visit modality, liveaboard visitors consistently exhibit the highest expenditure: an average of USD 7,833 in 2024 compared to USD 6,454 in 2025 ($p = 0.31$). In contrast, land-based tourists reported much lower averages (USD 2,133 to USD 2,716, $p = 0.32$). Among foreign cruise tourists, average expenditure declined from USD 12,248 to USD 8,363 ($p = 0.04$), while no relevant differences were observed for foreign land-based tourists. For national tourists, averages remained stable for both liveaboard (USD 2,129 to USD 2,015) and land-based visitors (USD 1,662 to USD 1,352).

Table A.7: Total expenditure per family group (USD per group/visit)

USD	Foreign			Domestic		
	Aug-2024	Jun-2025	Test	Aug-2024	Jun-2025	Test
Mean	6342	5737	$p = 0,60$	1751	1491	$p = 0,17$
(S.D.)	(±9069)	(±9029)		(±1970)	(±1202)	
Median	3000	3000		1000	1000	
USD	Liveaboard			Land-based		
	Aug-2024	Jun-2025	Test	Aug-2024	Jun-2025	Test
Mean	7833	6454	$p = 0,31$	2133	2716	$p = 0,32$
(S.D.)	(±10645)	(±6997)		(±2667)	(±7021)	
Median	3600	4000		1200	1200	
USD	Foreign – Liveaboard			Foreign – Land-based		
	Aug-2024	Jun-2025	Test	Aug-2024	Jun-2025	Test
Mean	12248	8363	$p = 0,04$	3013	3973	$p = 0,47$
(S.D.)	(±12383)	(±7555)		(±3600)	(±9526)	
Median	10000	6000		2000	1650	
USD	Domestic - Liveaboard			Domestic – Land-based		
	Aug-2024	Jun-2025	Test	Aug-2024	Jun-2025	Test
Mean	2129	2015	$p = 0,82$	1662	1352	$p = 0,17$
(S.D.)	(±2408)	(±1488)		(±1856)	(±1060)	
Median	1400	1800		1000	1000	

According to Table A.8, the average per-person expenditure remained stable across periods. Foreign tourists reported averages of USD 2,632 in 2024 and USD 2,346 in 2025, while national tourists averaged USD 473 and USD 508, respectively. By modality, liveaboard tourists had the highest per-person spending, with averages near USD 2,800, compared to USD 828 – 941 among land-based tourists. Among foreign cruise tourists, a decline is observed (USD 4,590 to USD 3,788 per person, $p = 0.04$), while differences are not statistically significant for national tourists or land-based visitors. Median values confirm the overall stability of expenditures in both groups.

Table A.8: Total expenditure per person (USD per person/visit)

USD	Foreign			Domestic		
	Aug-2024	Jun-2025	Test	Aug-2024	Jun-2025	Test
Mean	2632	2346	$p = 0,59$	473	508	$p = 0,53$
(S.D.)	(±3916)	(±3981)		(±475)	(±451)	
Median	1342	1000		286	217	
USD	Liveaboard			Land-based		
	Ago-2024	Jun-2025	Test	Ago-2024	Jun-2025	Test
Mean	2822	2810	$p = 0,99$	828	941	$p = 0,47$
(S.D.)	(±4645)	(±4683)		(±1241)	(±1699)	
Median	1000	1000		400	500	
USD	Foreign – Liveaboard			Foreign – Land-based		
	Aug-2024	Jun-2025	Test	Aug-2024	Jun-2025	Test
Mean	4590	3788	$p = 0,04$	1514	1354	$p = 0,64$
(S.D.)	(±5585)	(±5312)		(±1827)	(±2250)	
Median	3000	1875		900	700	
USD	Domestic - Liveaboard			Domestic – Land-based		
	Aug-2024	Jun-2025	Test	Aug-2024	Jun-2025	Test
Mean	539	538	$p = 0,99$	457	503	$p = 0,47$
(S.D.)	(±585)	(±355)		(±447)	(±481)	
Median	283	500		286	392	

Activities undertaken during the visit

Table A.9 summarizes the main activities carried out by tourists during their visit to the Galapagos. In general, the most common activities include swimming in the ocean and observing coastal-marine species, reported by more than 85% of visitors in both periods. Terrestrial wildlife observation remained high across all groups (between 81% and 89% among foreigners and 69% to 81% among nationals). Differences observed in scuba diving activities may reflect the season of the year in which the surveys were conducted.

Table A.9: Activities during current visit

Activities	Foreign		Domestic	
	Jun-2024	Aug-2025	Jun-2024	Aug-2025
Marine coastal wildlife watching	88%	94%	83%	88%
Terrestrial wildlife watching	81%	89%	69%	81%
Swimming in the sea	91%	91%	84%	85%
Snorkelling	87%	83%	64%	63%
Water sports (surfing, kayaking, paddle boarding)	35%	48%	29%	35%
Scuba diving	23%	35%	16%	14%

Satisfaction levels

Table A.10 presents satisfaction levels by visit modality. Overall, satisfaction with nature and biodiversity remains high, with more than 85% of respondents indicating they were satisfied or very satisfied. Cruise tourists reported higher satisfaction levels than land-based visitors (60% vs. 46% “very satisfied” in 2025). Satisfaction with infrastructure and accessibility is comparatively lower, especially among land-based visitors (25% “very satisfied” in 2025). Regarding the quality of tourism services, overall satisfaction remains stable, with slight improvements among land-based tourists and a small decline among cruise visitors. These patterns suggest the need to strengthen investment in maintenance, accessibility, and renovation of visit sites infrastructure.

Table A.10: Satisfaction level by aspect and tourist modality

State of nature and biodiversity	Land-based		Liveaboard	
	Aug-2024	Jun-2025	Aug-2024	Jun-2025
Very unsatisfied	7%	5%	3%	2%
Unsatisfied	2%	1%	0%	1%
Neutral	4%	4%	2%	2%
Satisfied	38%	44%	23%	36%
Very satisfied	48%	46%	73%	60%
Access and infrastructure of visit sites	Land-based		Liveaboard	
	Aug-2024	Jun-2025	Aug-2024	Jun-2025
Very unsatisfied	4%	6%	2%	2%
Unsatisfied	4%	3%	0%	2%
Neutral	16%	14%	6%	9%
Satisfied	47%	52%	44%	40%
Very satisfied	28%	25%	48%	48%
Quality of tourism services	Land-based		Liveaboard	
	Aug-2024	Jun-2025	Aug-2024	Jun-2025
Very unsatisfied	4%	5%	2%	2%
Unsatisfied	3%	2%	2%	2%
Neutral	13%	10%	2%	6%
Satisfied	46%	53%	37%	38%
Very satisfied	33%	31%	58%	52%

Perceived threats to biodiversity

Table A.11 shows the threats perceived by tourists to local biodiversity. The main concerns relate to solid waste accumulation and the presence of invasive species, each noted by more than 60% of respondents. Among foreign tourists, concern about wildlife trafficking increased significantly (from 22% to 38%, $p < 0.01$). No significant changes were detected in other perceived threats.

Table A.11: Which of the following do you think are the main threats to the biodiversity of the Galapagos Marine Reserve? Select up to three options

Threats to biodiversity	Foreign Tourists			Domestic tourists		
	Aug-2024	Jun-2025	Test	Aug-2024	Jun-2025	Test
Solid waste accumulation	64%	63%	$p = 0,90$	67%	67%	$p = 0,99$
Invasive species	68%	77%	$p = 0,10$	62%	66%	$p = 0,47$
Illegal (IUU) fishing	43%	52%	$p = 0,16$	56%	48%	$p = 0,17$
Growth of tourism	52%	47%	$p = 0,48$	33%	35%	$p = 0,73$
Traffick of species	22%	38%	$p = 0,00$	38%	46%	$p = 0,17$
Growth of local population	20%	22%	$p = 0,59$	35%	39%	$p = 0,46$

Willingness to pay

Table A.12 summarizes visitors' willingness to pay for entry to the Galápagos National Park. On average, foreign land-based tourists are willing to pay USD 158 and liveaboard tourists USD 253, with median values of USD 200 in both cases. National tourists show lower willingness to pay, with averages of USD 27 (land-based) and USD 36 (liveaboard) and a median of USD 20. These results suggest considerable scope to maintain the current entry fee without adversely affecting international demand, increasing the need for better communication strategies to strengthen support among domestic visitors.

Table A.12: Willingness to pay for access to the Galapagos National Park by nationality and tourist modality

Willingness to pay USD per person	Foreign tourists		Domestic tourists	
	Land-based	Liveaboard	Land-based	Liveaboard
Mean (S.D.)	158 (± 101)	253 (± 150)	27 (± 41)	36 (± 41)
Median	200	200	20	20
Min.	6	20	5	5
Max.	600	1000	500	200