



ANNUAL PROGRESS REPORT 2023

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01 INTRODUCTION



Sustainable Tourism Observatory Activity

The Sustainable Tourism Observatory of Mallorca (STO Mallorca) was born within the framework of the Recovery, Transformation and Resilience Plan of the Spanish Government with the Next Generation EU funds aligned with the strategic plan of Fundació Mallorca Turisme (FMT) of The Consell de Mallorca. Since 2021, we are part of the UNWTO International Network of Sustainable Tourism Observatories (INSTO), a network of tourism observatories that monitor the economic, environmental and social impact of tourism at destination level.

In 2023, the STO Mallorca continued its development, initiated at the end of 2021. During 2022 and early 2023, a series of key indicators were implemented, aligned with INSTO's areas of interest and adapted to the specific reality of the destination. These indicators provided valuable information on sustainability and tourism impact.

At the same time, in response to the growing issue of illegal holiday rentals, the focus of the STO Mallorca changed significantly, focusing on improving administrative processes and optimising the internal management of the tourism offer. This change in priorities allowed the Administration to strengthen its control mechanisms for a more efficient management of unregulated tourism, adapting its efforts to the most urgent needs of the destination.



Mallorca

Mallorca, jewel of the Mediterranean, was consolidated in 2023 as one of the most attractive and versatile destinations for travellers from all over the world. The island offers a unique combination of breathtaking landscapes, crystal clear beaches, rich culture and a welcoming atmosphere that makes it the ideal place for all types of tourists.

Sustainability and Quality

In 2023, Mallorca has taken important steps towards more sustainable tourism. With eco-friendly accommodation, preserved nature trails and a responsible tourism offer, the island seeks to protect its natural beauty. In addition, Mallorca combines its sustainable approach with quality experiences.

A Year Round Destination

Although a quintessential summer destination, Mallorca has much to offer all year round. The mild climate in autumn and winter, allows you to enjoy its beauty in a quieter environment, ideal for romantic getaways or wellness retreats.

In short, Mallorca in 2023 remains a destination second to none for its diverse landscapes, vibrant culture, world-class culinary experiences and commitment to sustainable tourism. An island that continues to capture the hearts of travellers, discover all that Mallorca has to offer!

02 DIAGNOSIS

In this section we will show a summary of the principal indicators of Mallorca during the year 2023, according with the INSTO areas and some additional areas:

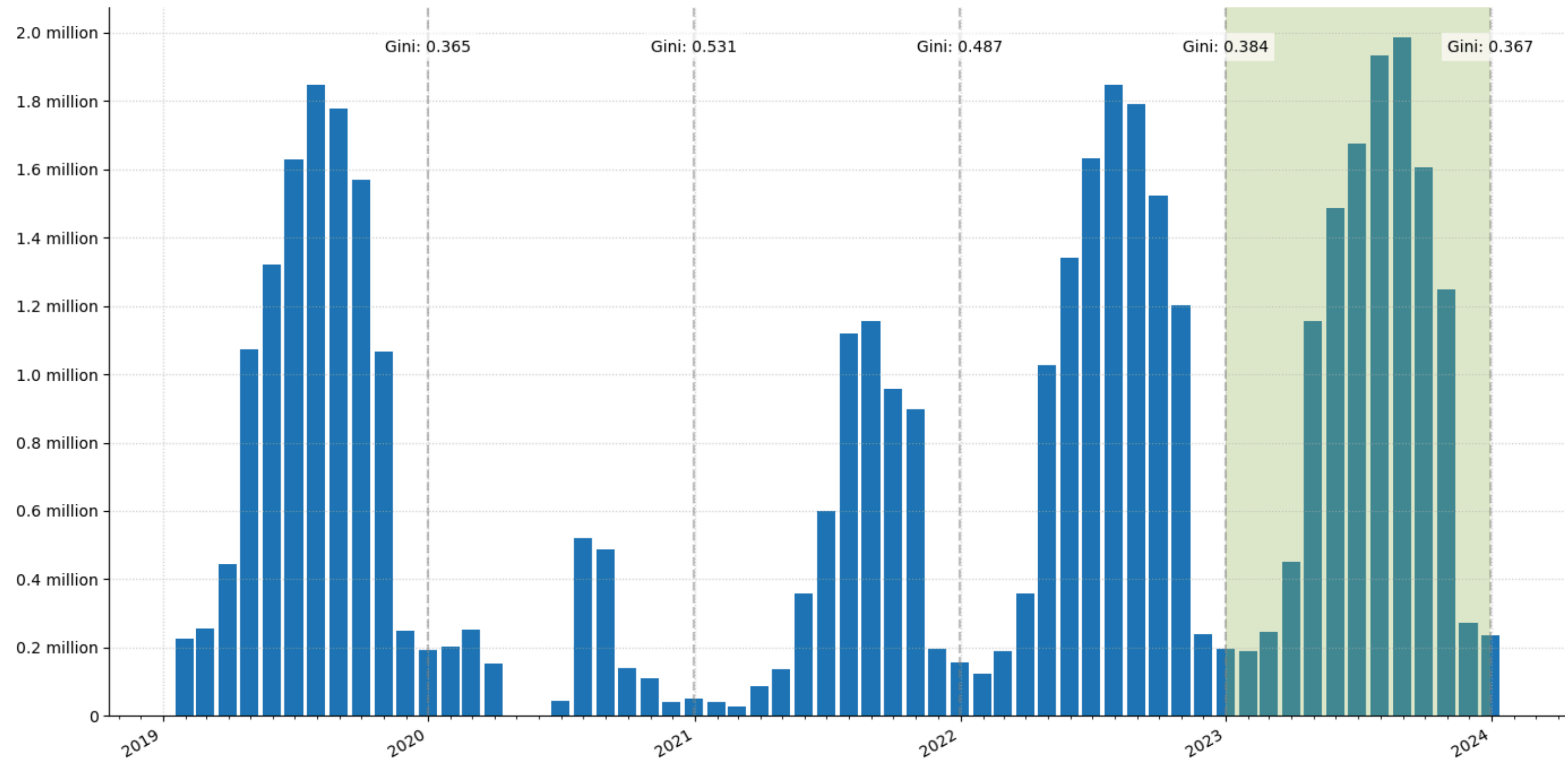


02 DIAGNOSIS: TOURISM SEASONALITY - DEMAND

Tourist arrivals in Mallorca and Gini Coefficient*

Tourists from the Balearic Islands are excluded.

Source: IBESTAT – Tourist movements at the border



Notes:

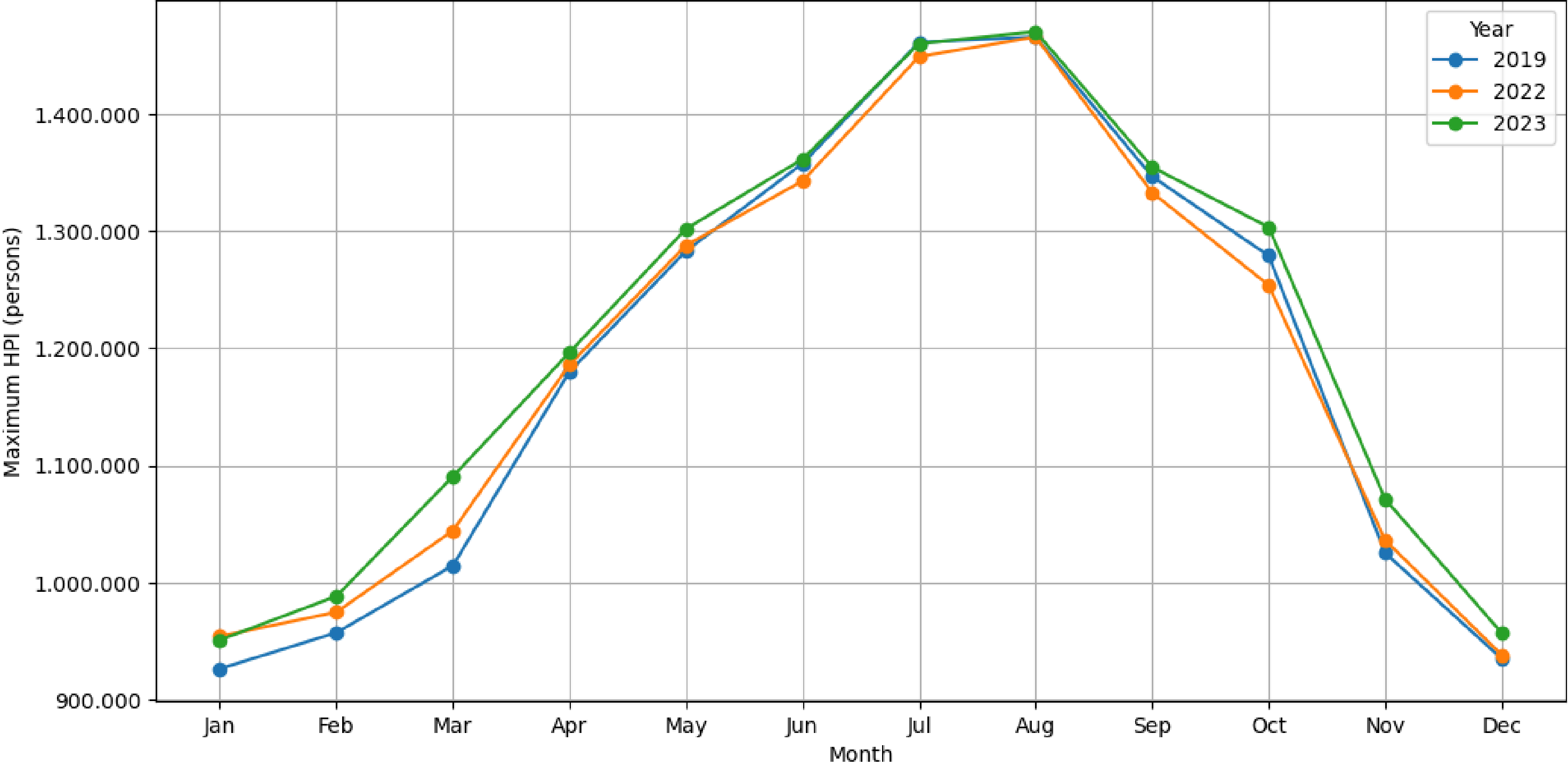
After the pandemic period, we observe that in 2023 seasonality returns to levels almost identical to 2019, with a Gini coefficient of 0.367.

*The Gini coefficient is typically used to measure income inequality within a country, but can be used to measure any form of unequal distribution. It is a number between 0 and 1, where 0 corresponds to perfect equality (all months receive the same number of tourists) and where the value 1 corresponds to perfect inequality (all tourism is concentrated in one month, and all other months have none).

02 DIAGNOSIS: TOURISM SEASONALITY - DEMAND

Monthly maximum human pressure index in Mallorca

Source: IBESTAT - Human Pressure Indicator



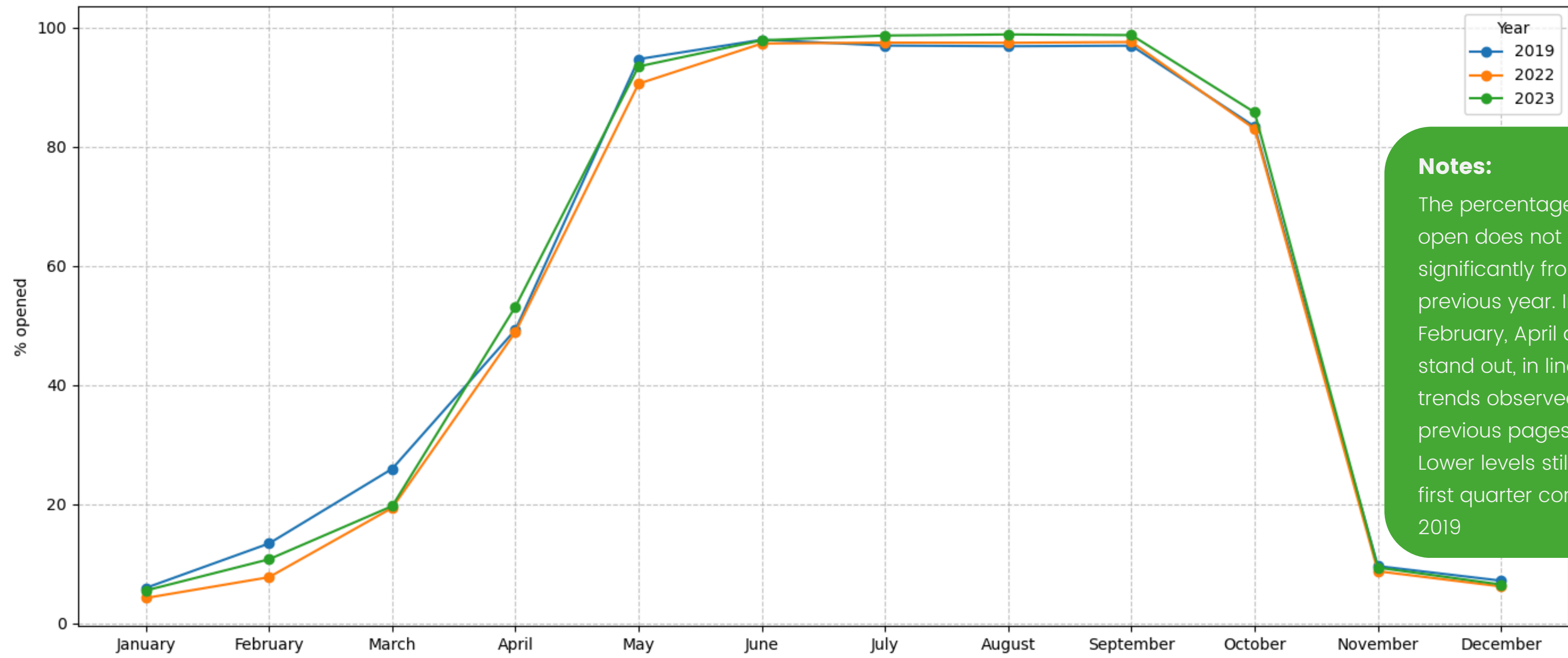
Notes:

We can observe a greater increase during the months of March and September compared to the previous year, so that the peaks of human pressure expand at the beginning and end of the season. On the other hand, we see that pre-pandemic values are being exceeded.

02 DIAGNOSIS: TOURISM SEASONALITY - SUPPLY

Percentage of opened hotels in Mallorca

Source: IBESTAT - Hotel Occupancy Survey.



Notes:

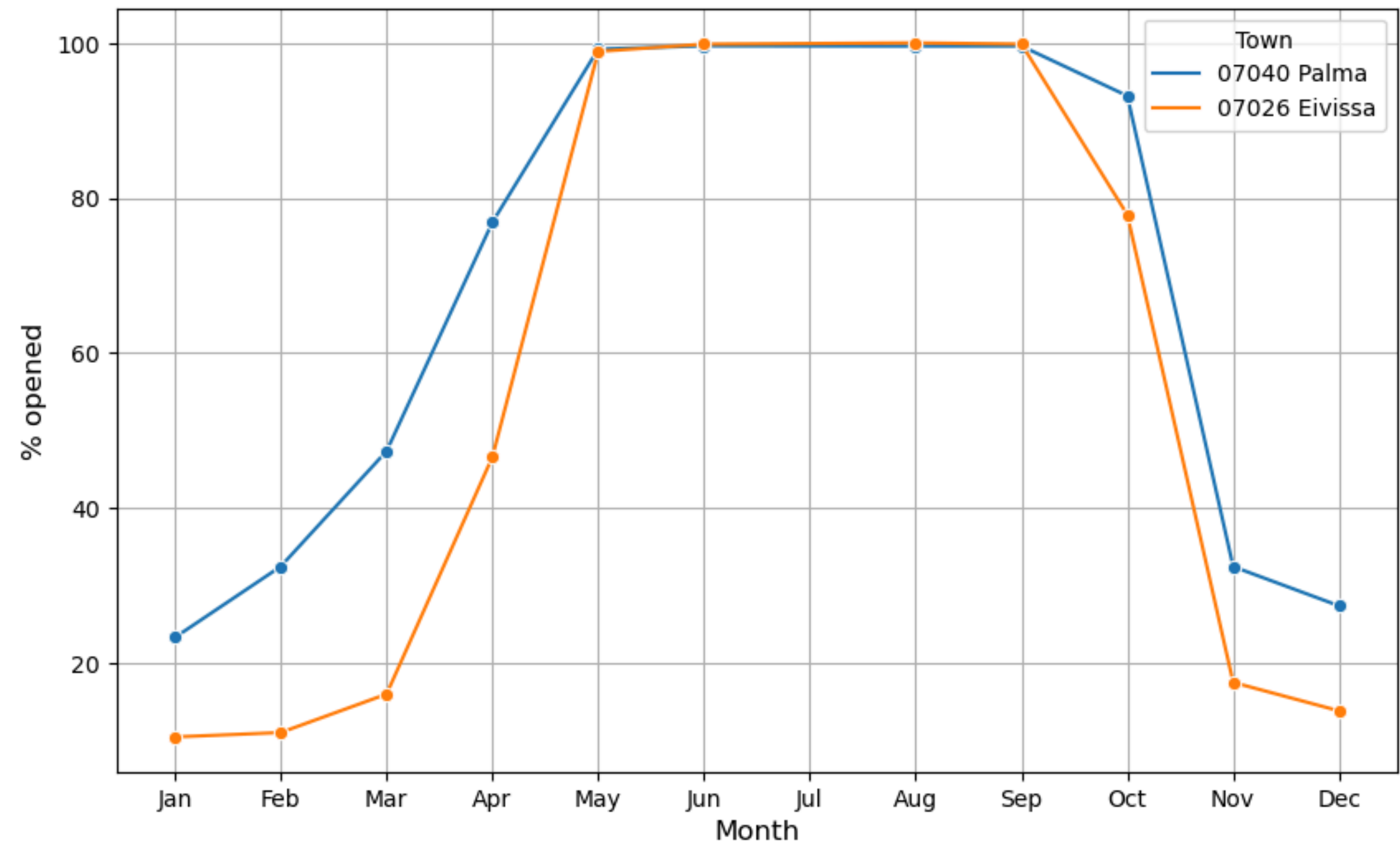
The percentage of hotels open does not vary significantly from the previous year. Increases in February, April and October stand out, in line with the trends observed in the previous pages. Moreover, Lower levels still seen in the first quarter compared to 2019

02 DIAGNOSIS: TOURISM SEASONALITY - SUPPLY

For context, let's compare two of the main cities in the Balearic Islands: Palma and Ibiza.

% of hotels open in 2023: Palma vs Ibiza

Source: IBESTAT - Hotel
Occupancy Survey



Notes:

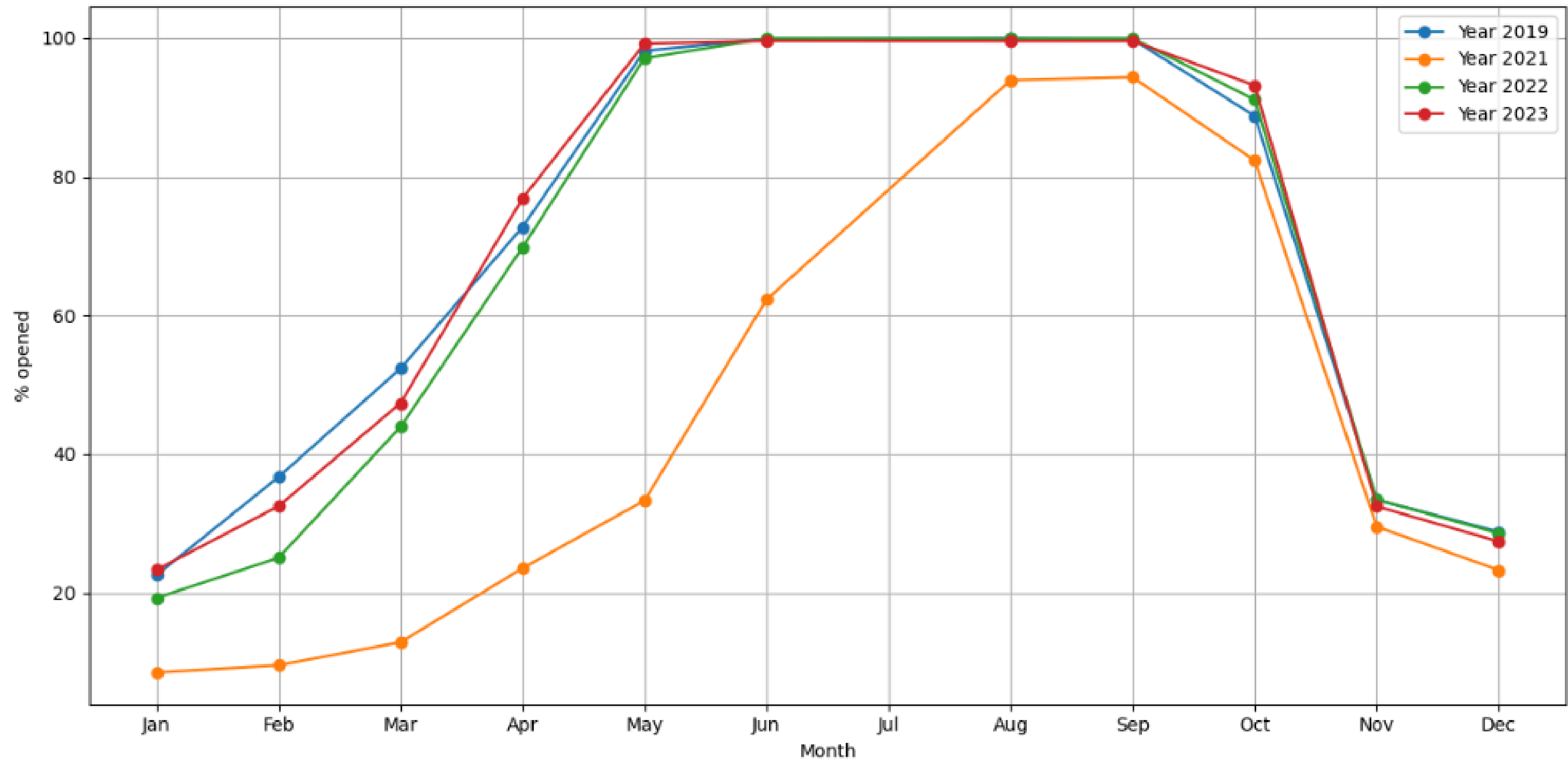
Palma continues to be one of the municipalities with the lowest tourist seasonality in the Balearic Islands. If we compare the % of hotels open in Ibiza and Palma during 2023, we can see that the difference is notable, showing a less accentuated seasonal curve.

02 DIAGNOSIS: TOURISM SEASONALITY - SUPPLY

Let's take a closer look at the evolution in Palma

Evolution of hotels open in Palma

Source: IBESTAT - Hotel Occupancy Survey



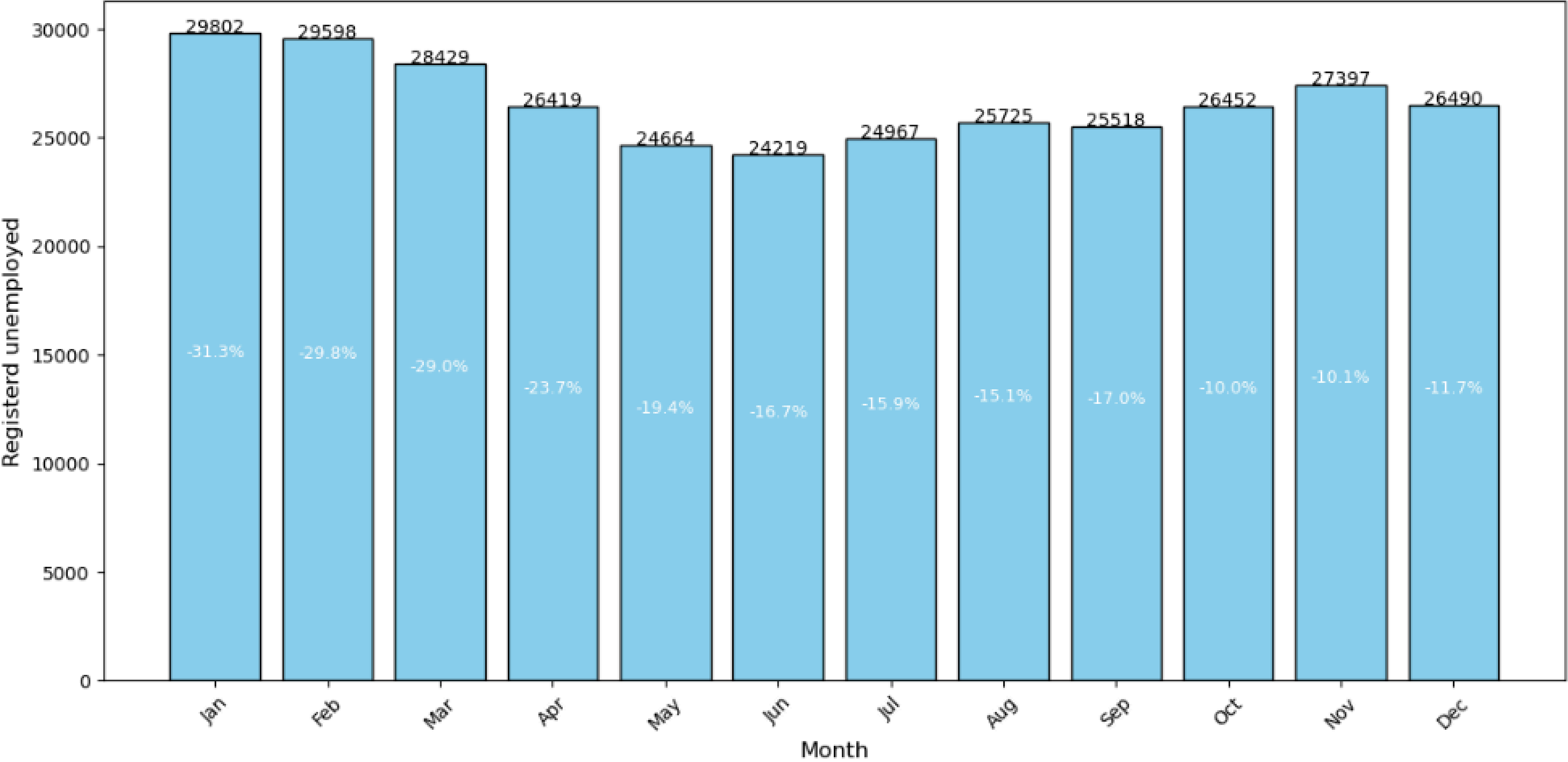
Notes:

If we compare Palma's values in recent years, we can see that in 2021 the impact of the pandemic continued to be felt. On the other hand, we observe that the opening levels recorded in February and March 2019 have not yet been recovered. However, in 2023 we approached these values and exceeded them in months such as April and October.

02 DIAGNOSIS: EMPLOYMENT

Registered unemployed in Mallorca

Source: IBESTAT – Registered unemployed and job seekers



Notes:

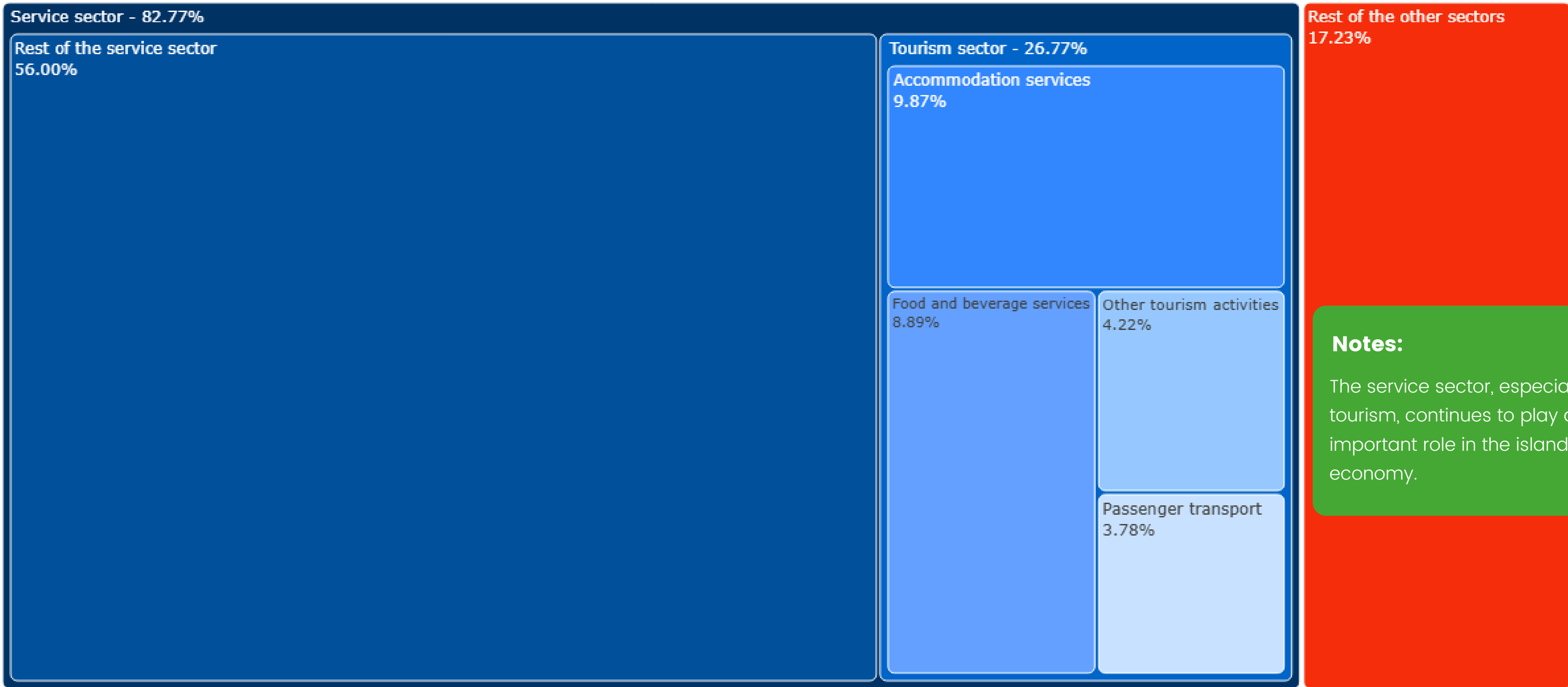
The percentage shown in the bar indicates the year-on-year increase/decrease.

It can be seen how the unemployment increase is inversely related to the human pressure and tourist arrivals. On the other hand, we see that the number of registered unemployed has been decreasing throughout the year, especially during the first four months of 2023.

02 DIAGNOSIS: EMPLOYMENT

Weight of the tourism sector in social security affiliations in 2023 in Mallorca

Source: IBESTAT – Social Security affiliations in the tourism sector



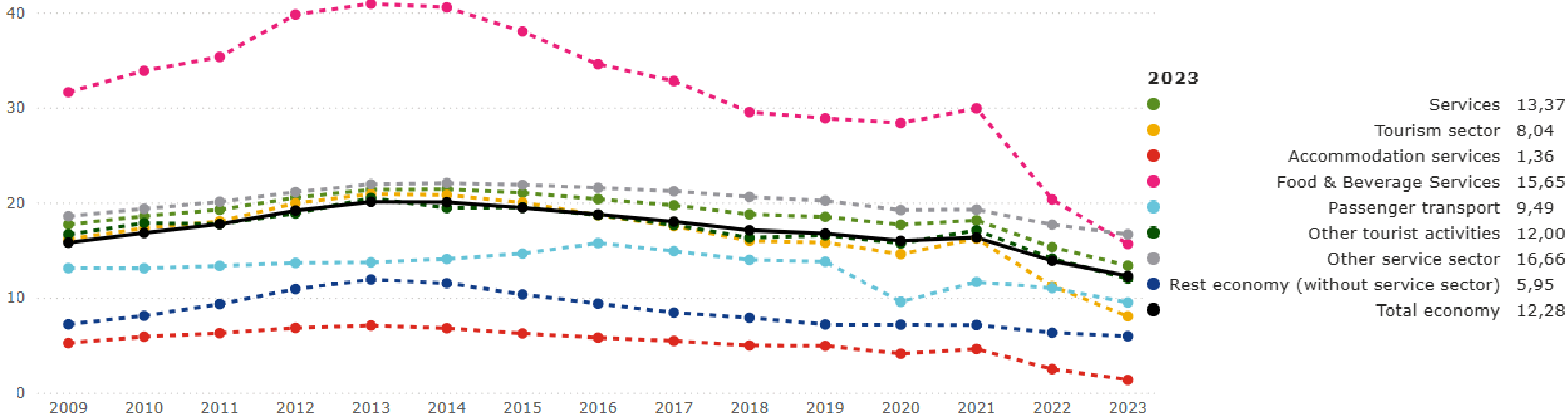
02 DIAGNOSIS: EMPLOYMENT

Part-time jobs in the tourism sector

The proportion of part-time jobs is slightly down on the previous year, from 13.88% to 12.28%. This decrease is more evident in the tourism and related sectors. This trend can be seen in the following graph. Food and beverage services sector should be highlighted. If we look at its evolution, we can see a large reduction in the proportion of part-time jobs, dropping to levels similar to the rest of the sectors in the islands.

Proportion of part-time tourism jobs in the Balearic Islands by year and type of sector (%)

Source: IBESTAT - Social Security affiliations in the tourism sector

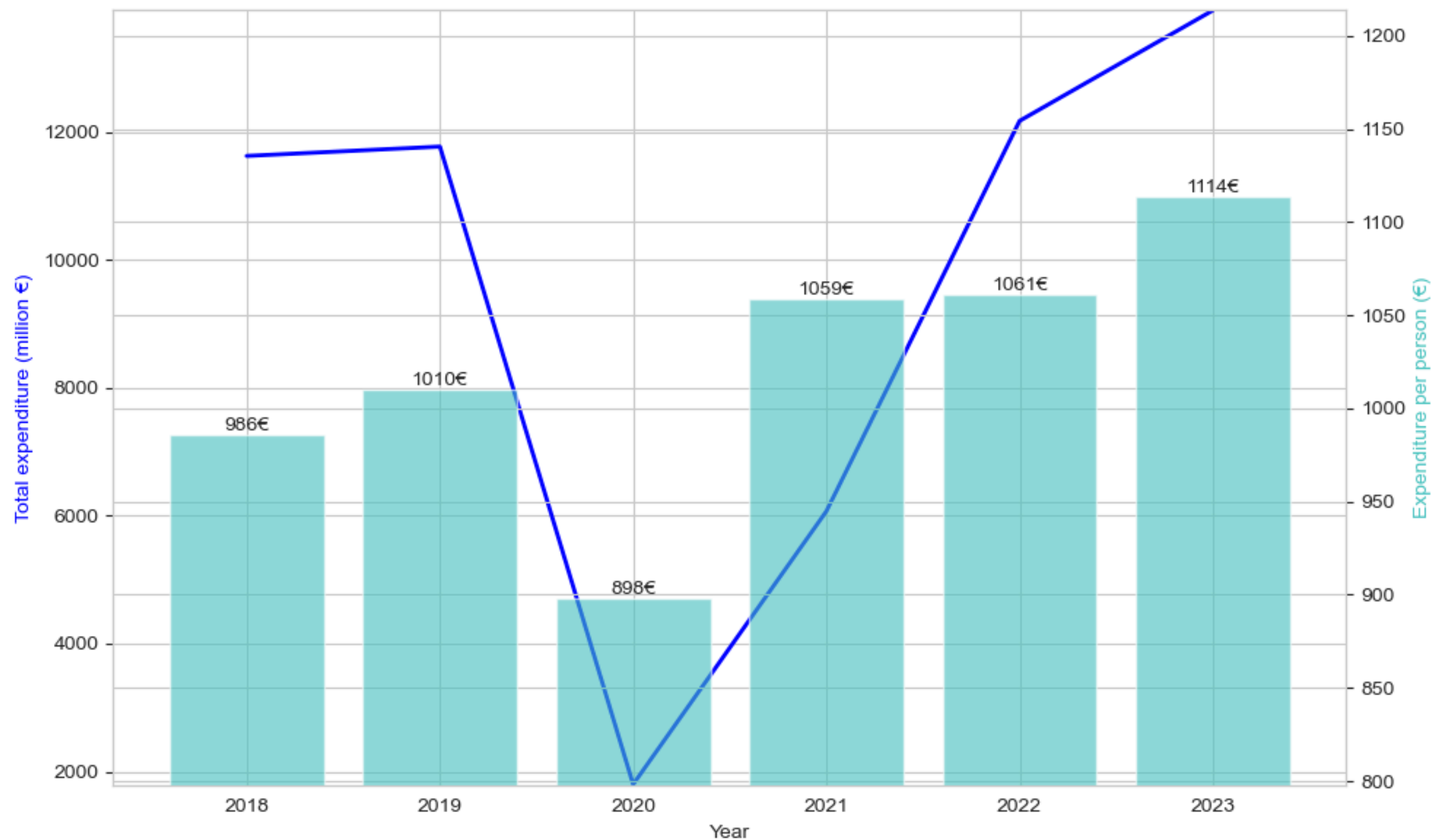


02 DIAGNOSIS: DESTINATION ECONOMIC BENEFITS

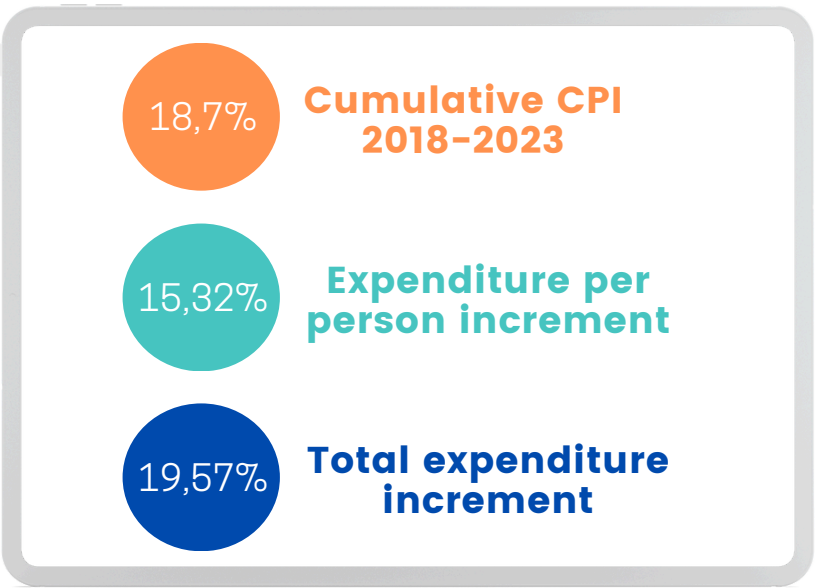
Evolution of tourist spending in Mallorca

Tourists from the Balearic Islands are excluded.
Total expenditure is omitted in 2020 due to lack of data.

Source: IBESTAT – Tourism Expenditure Survey



Context data



Source: INE- CPI calculator

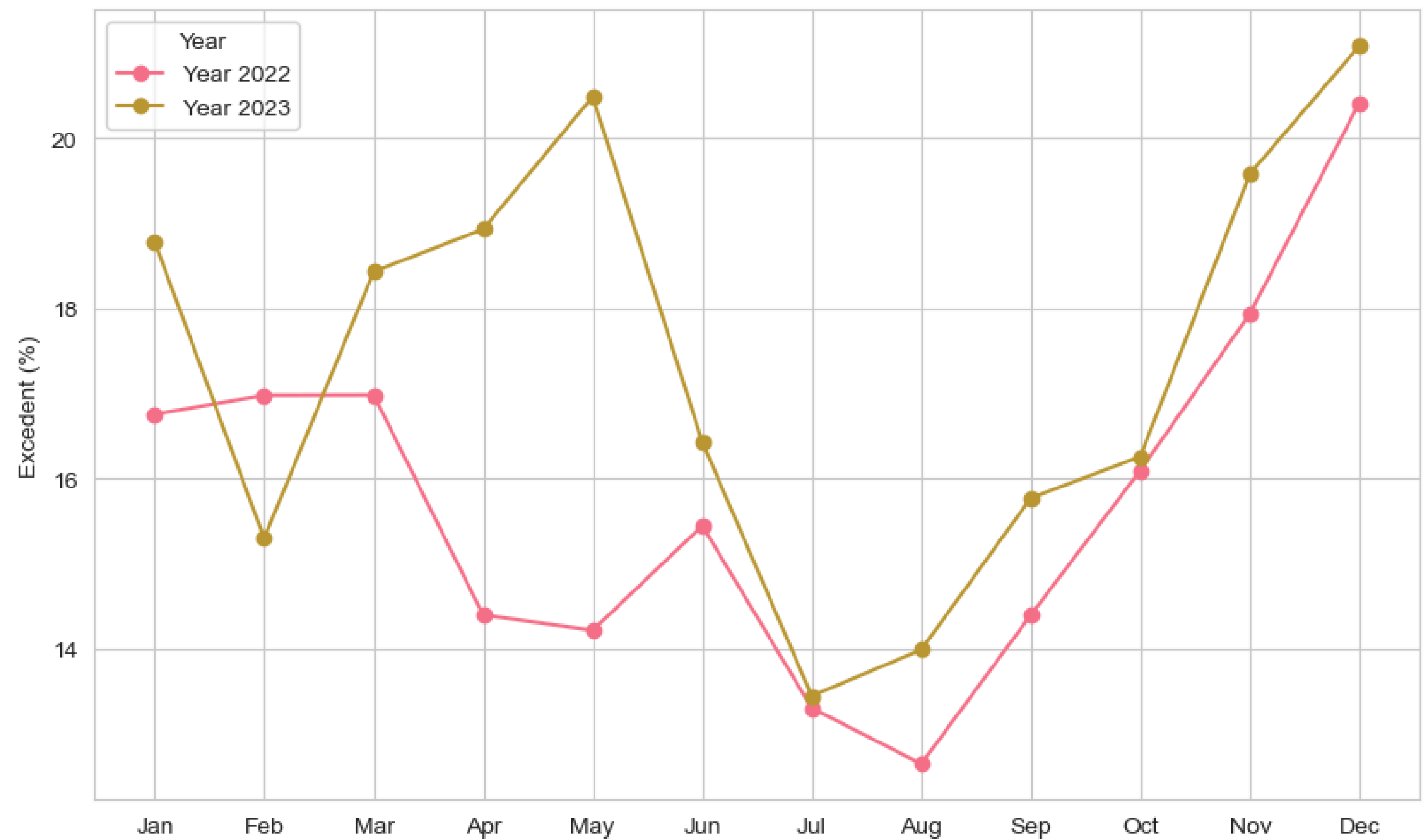
Notes:

With regard to tourism expenditure, according to the tourism expenditure survey, an upward trend is observed with respect to total expenditure, recovering and surpassing the values of 2019. However, if we take into account the accumulated inflation in the Balearic Islands, the increase is not so significant. Regarding the average expenditure per tourist, we see that the increase in expenditure per person during the period 2018-2023 is below the accumulated inflation.

02 DIAGNOSIS: ENERGY MANAGEMENT

Energy produced vs energy consumed in Mallorca

Source: IBESTAT - Electricity production and demand



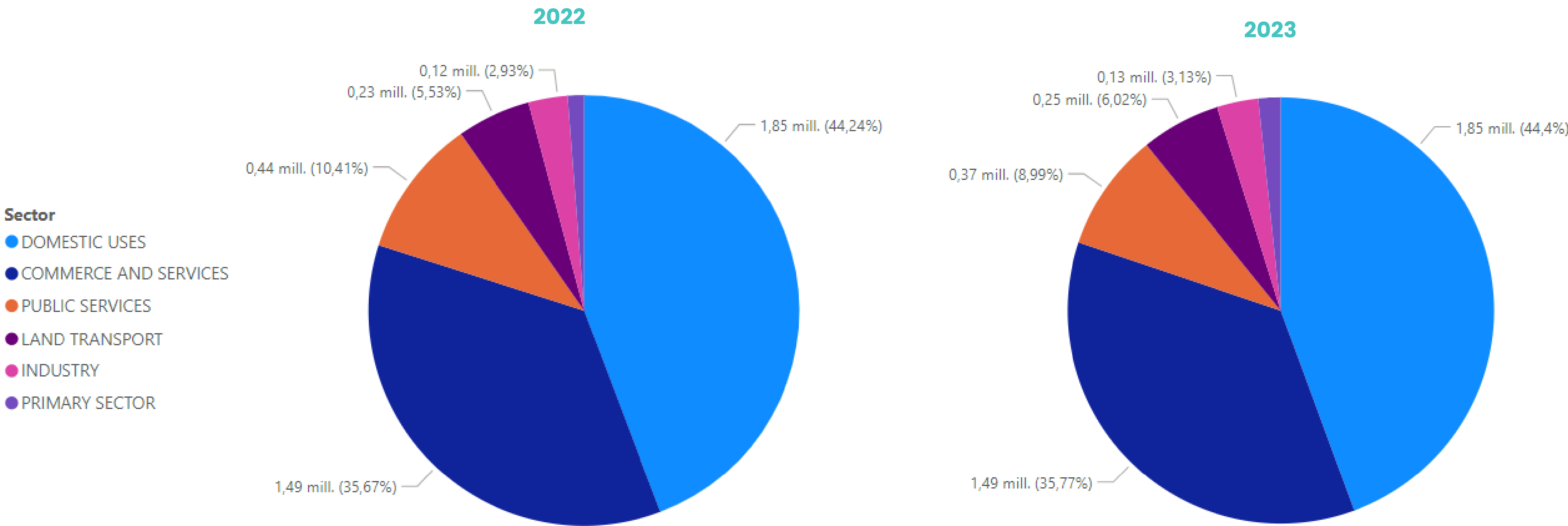
Notes:

The difference between energy produced and energy consumed over the last year is growing. It can be seen how the seasonal pattern of the peak season is also reflected in the energy consumed.

02 DIAGNOSIS: ENERGY MANAGEMENT

Electricity consumed in Mallorca by sector/usage

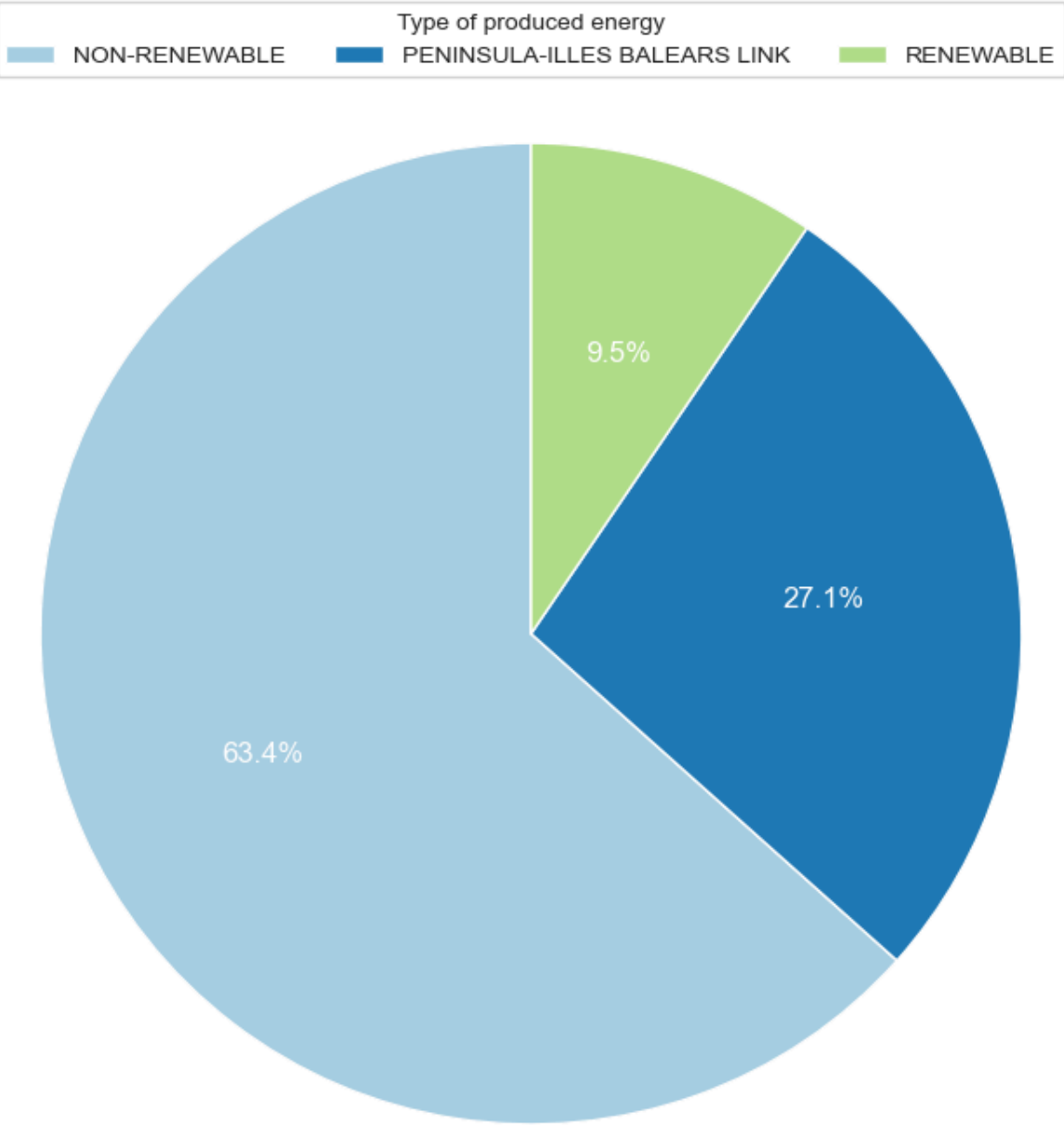
Electricity consumption in Mallorca has not changed significantly compared to the previous year. It is worth highlighting a decrease in consumption by public administrations and services, as a consequence of the improvement of energy efficiency in their facilities.



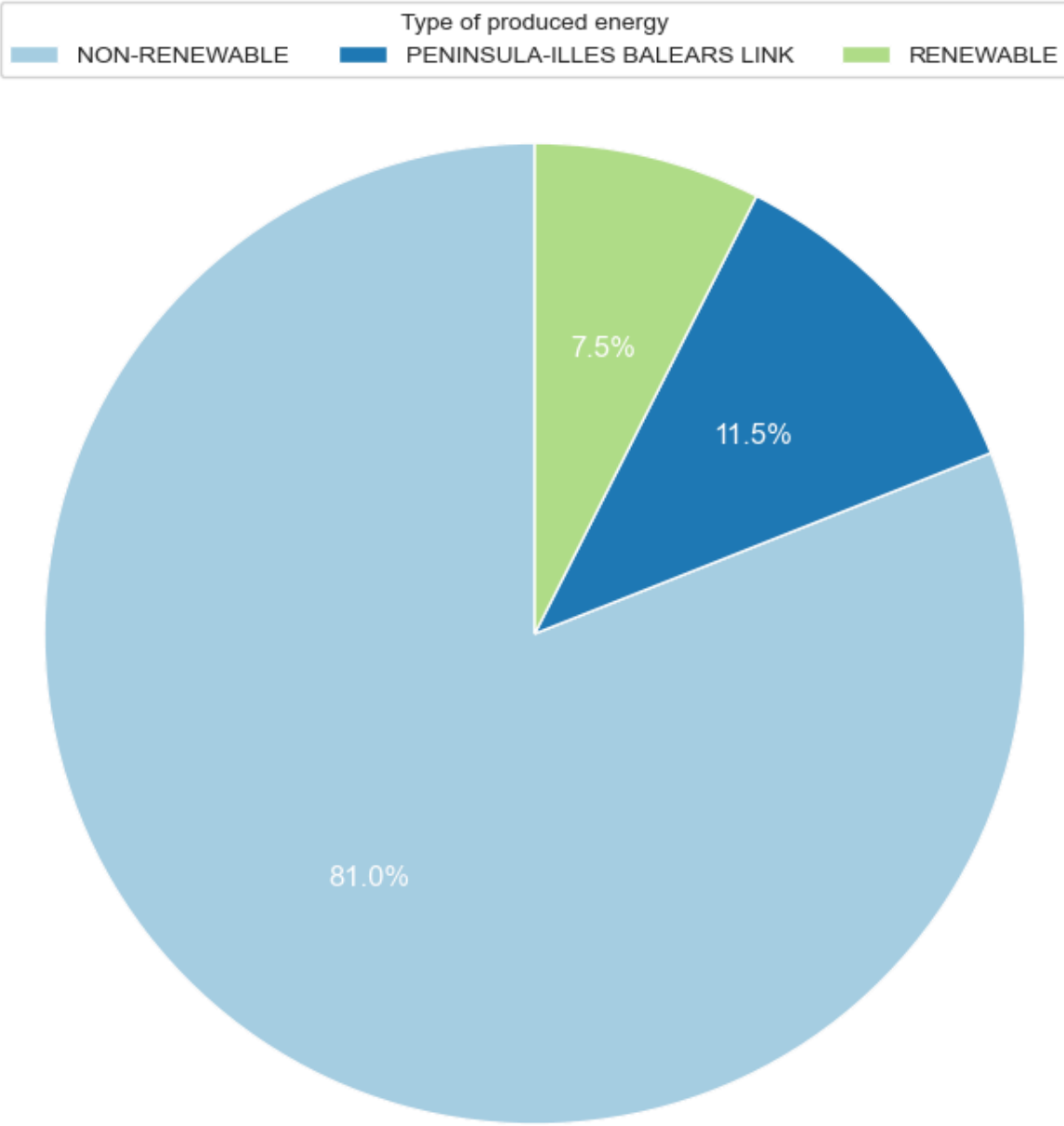
Source: Directorate-General for Energy and Climate Change of the Balearic Islands – Statistical portal

02 DIAGNOSIS: ENERGY MANAGEMENT

Type of energy produced in Mallorca in 2023



Type of energy produced in Mallorca in 2022

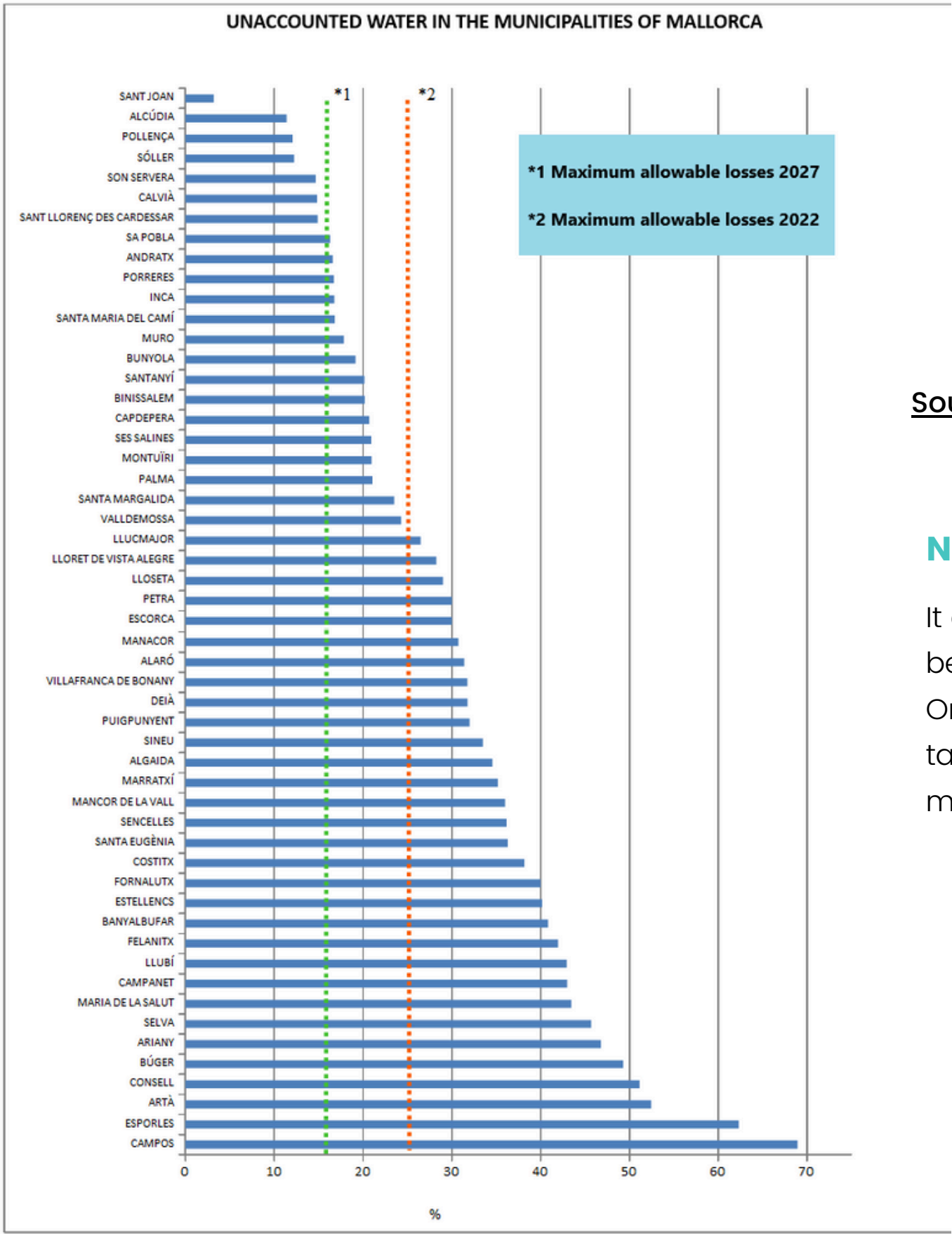
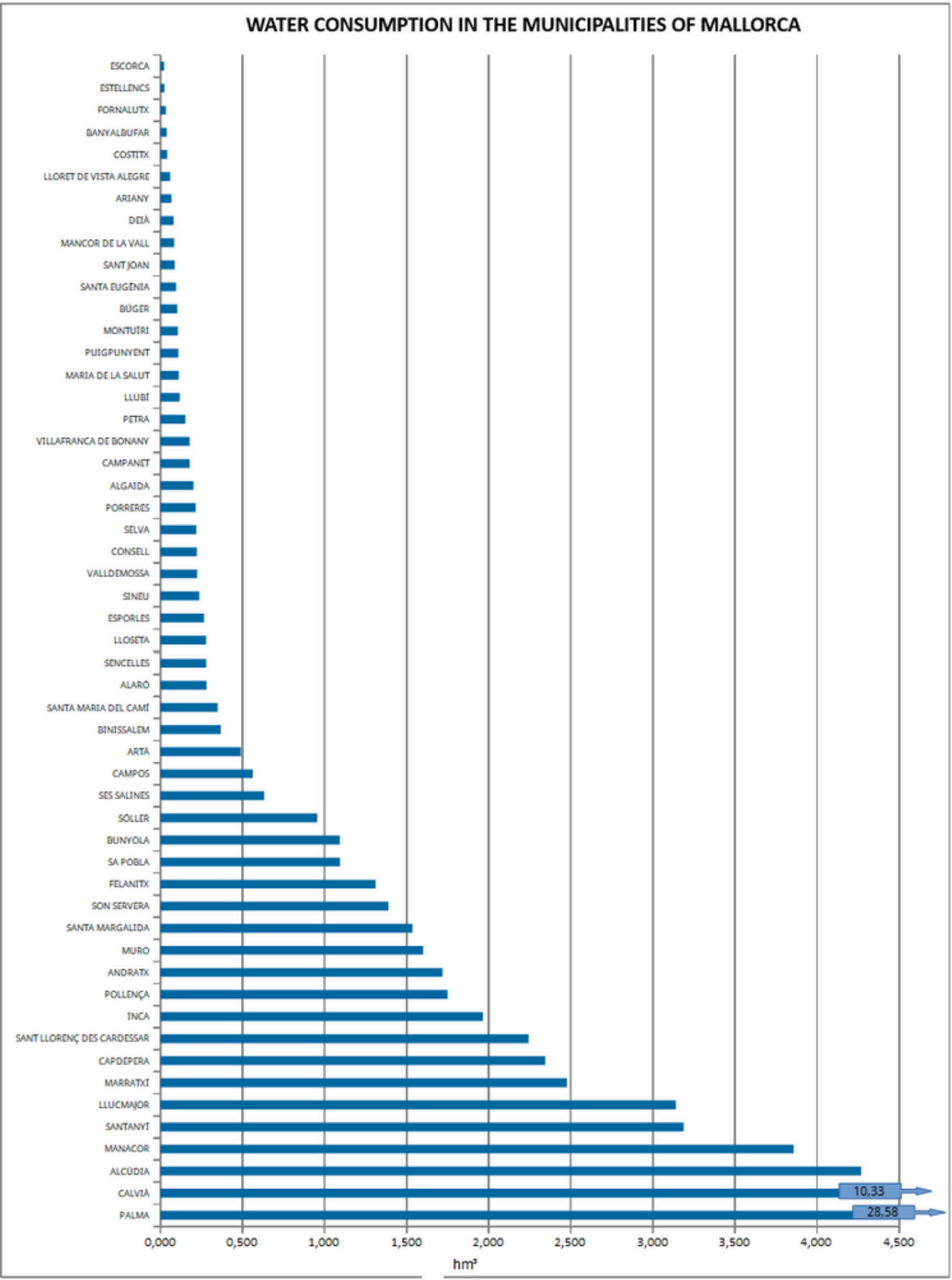


Notes:

Slight increase in the use of renewable energy and reduction of non-renewable energy production thanks to the increase of energy from the peninsular link.

Source: IBESTAT – Electricity production and demand

02 DIAGNOSIS: WATER MANAGEMENT













Source: Govern de les Illes Balears – Water portal

Notes:

It can be seen that there is still a lot of work to be done to meet the maximum loss targets. Only 7 out of 53 municipalities meet 2027 targets. On the other hand, less than half of the municipalities meet last year's targets.

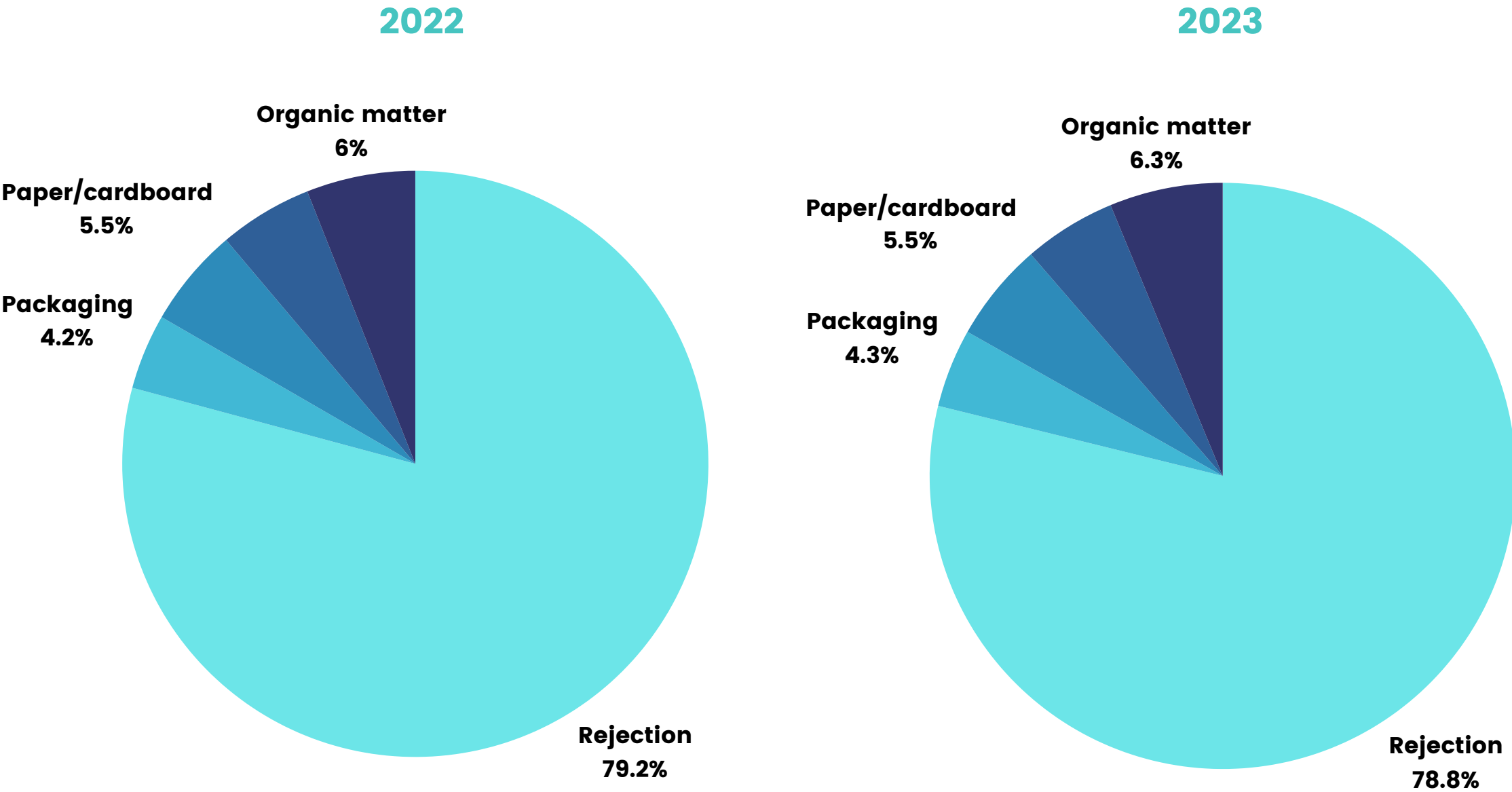
02 DIAGNOSIS: WASTE WATER (SEWAGE) MANAGEMENT

Global Sustainable Council compliance indicators

	OK?	Source
• Programme to assist tourism businesses to safely treat and reuse wastewater with minimal adverse effects on the local population and the environment.		 
• Regulations for the siting, maintenance and testing of septic tanks and wastewater treatment systems, and evidence of their application.		  
• Regulations to ensure that the size and type of wastewater treatment is appropriate for its location, and evidence of implementation.		 

02 DIAGNOSIS: SOLID WASTE MANAGEMENT

Solid waste distribution in Mallorca



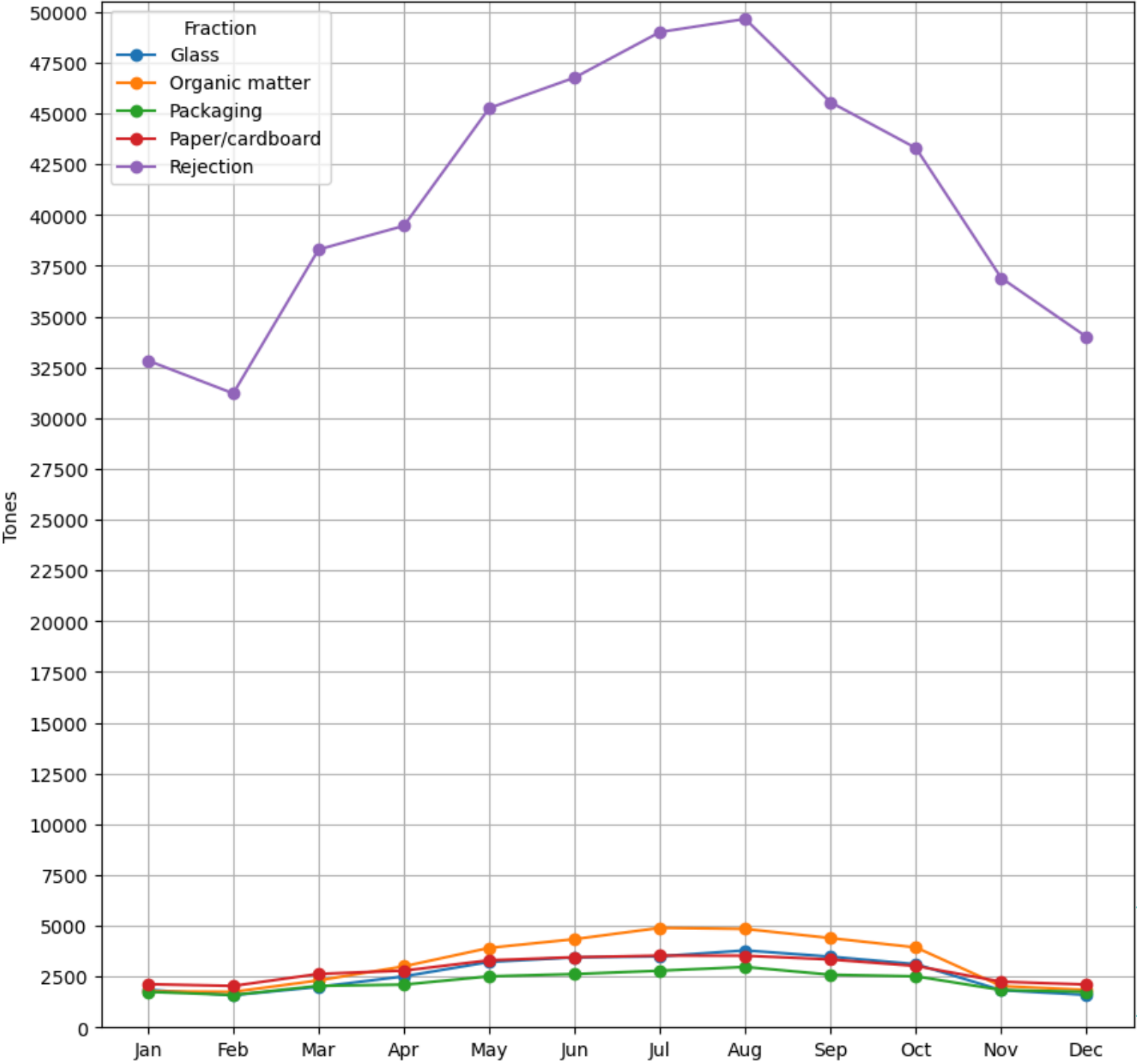
Notes:

Overall, there is little change from the previous year, with an increase of around 1% in municipal solid waste generation. As can be seen, the distribution of the type of waste and the % of waste recycled hardly varies.

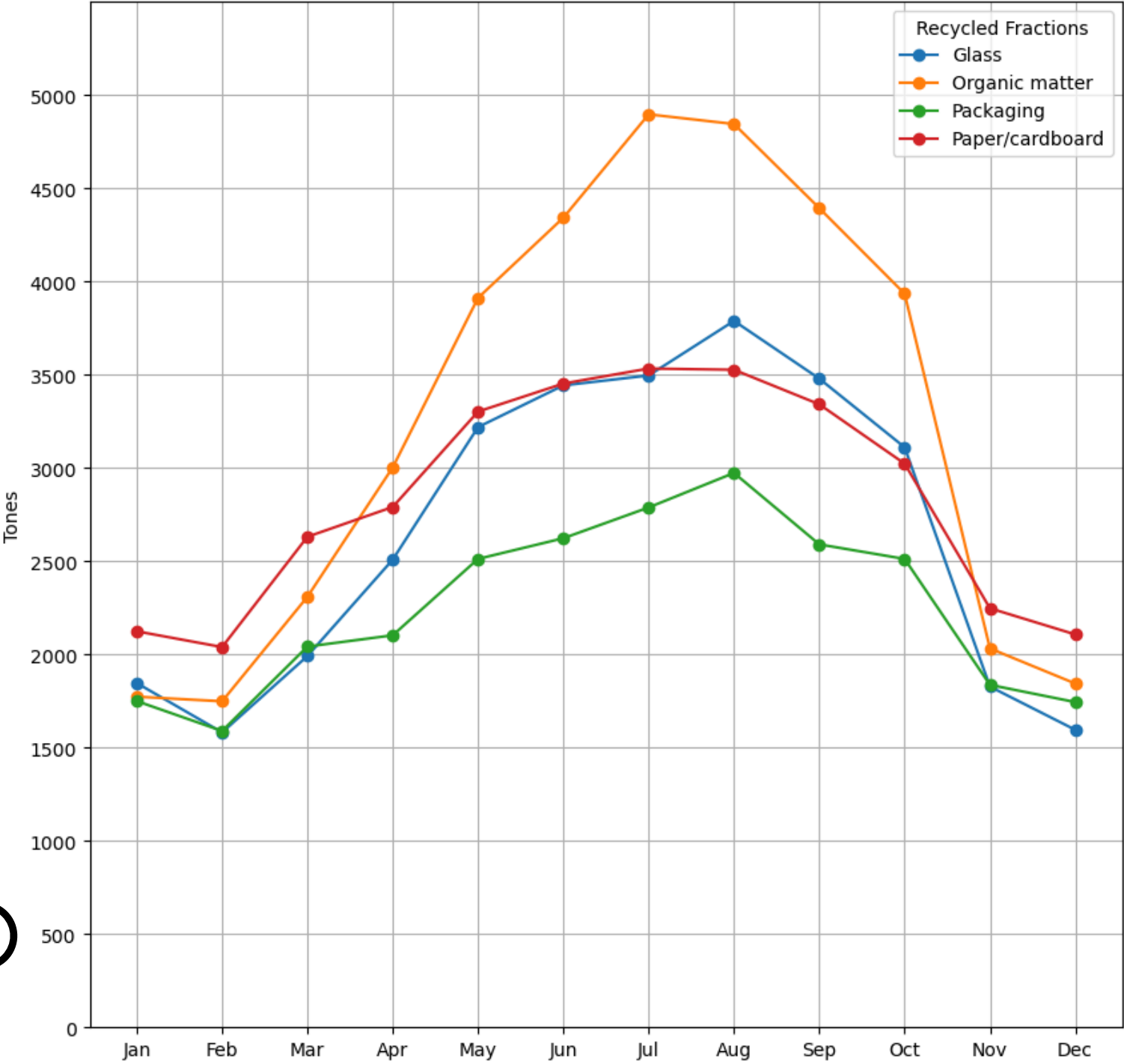
Source: Consell de Mallorca – Urban waste from Mallorca

02 DIAGNOSIS: SOLID WASTE MANAGEMENT

Monthly solid waste produced in Mallorca in 2023



Source: Consell de Mallorca - Urban waste from Mallorca



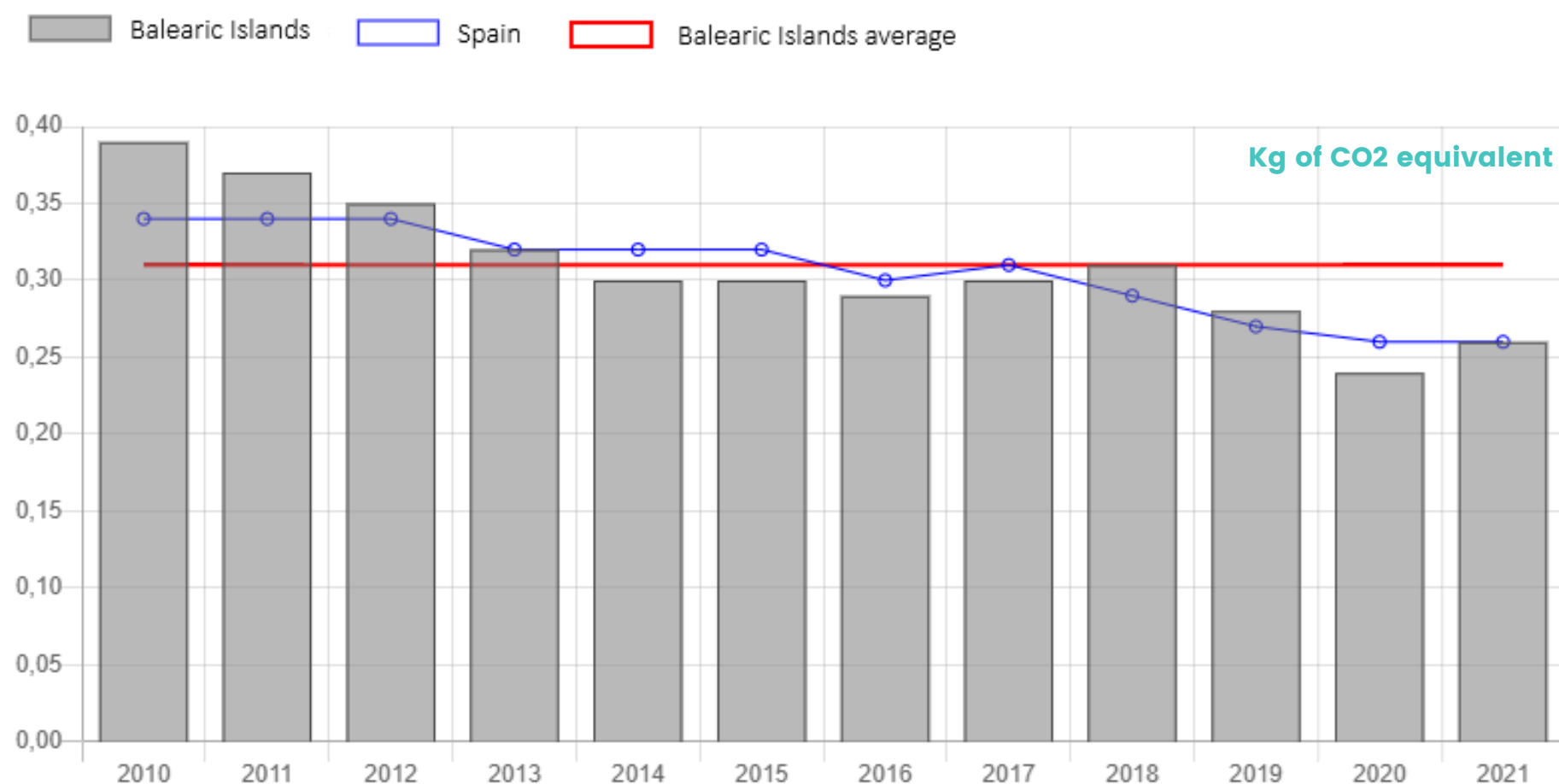
Notes:

Regarding monthly waste generation, we see the same curve as the previous year, with the same seasonal pattern as the rest of the data observed. You can find a more detailed analysis in our website.

02 DIAGNOSIS: CLIMATE ACTION

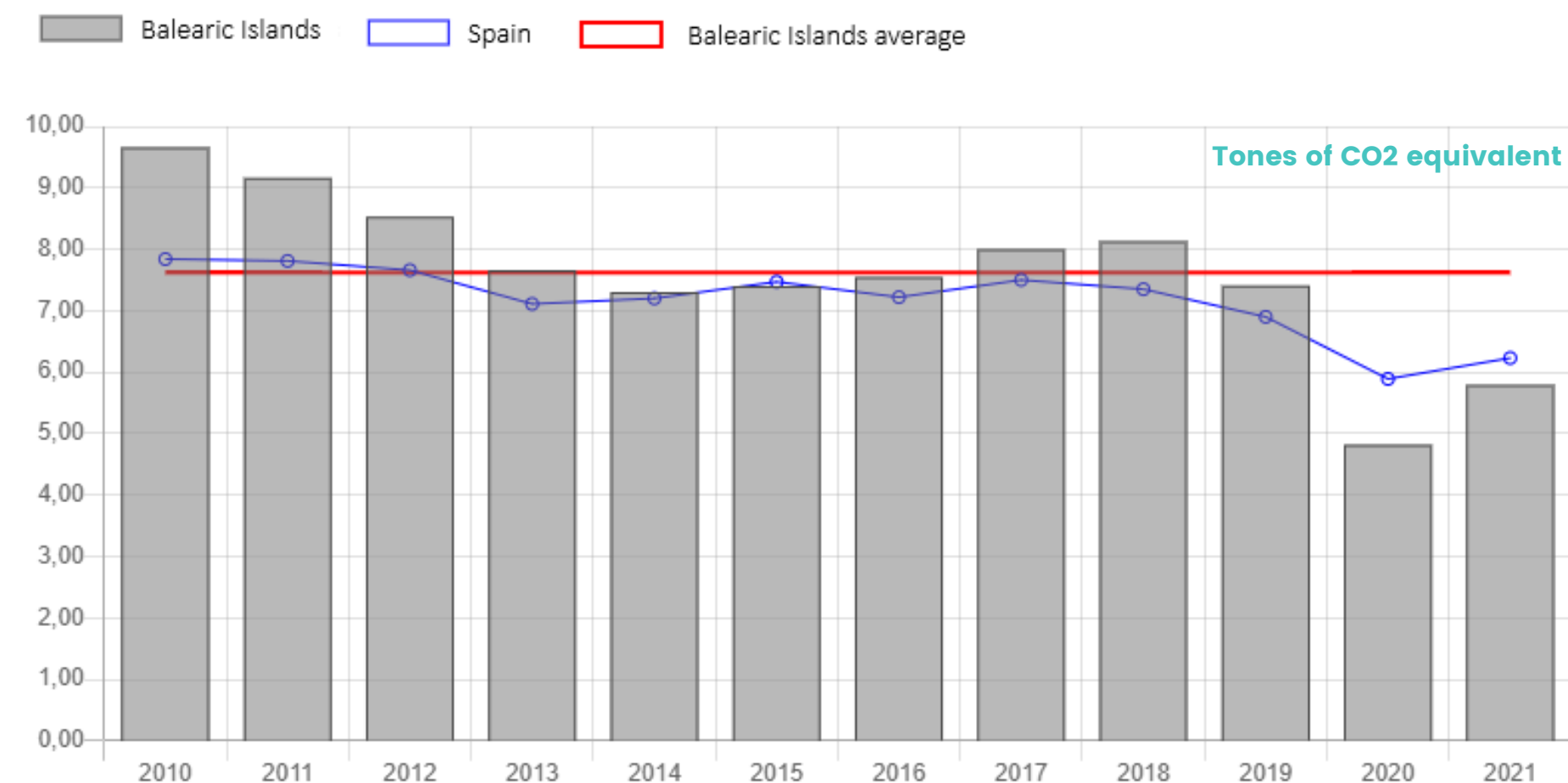
Total greenhouse gas emissions of resident units per unit of GDP

Source: IBESTAT – SDG indicators > Indicator 13.2.2



Total greenhouse gas emissions of resident units per capita

Source: IBESTAT – SDG indicators > Indicator 13.2.2



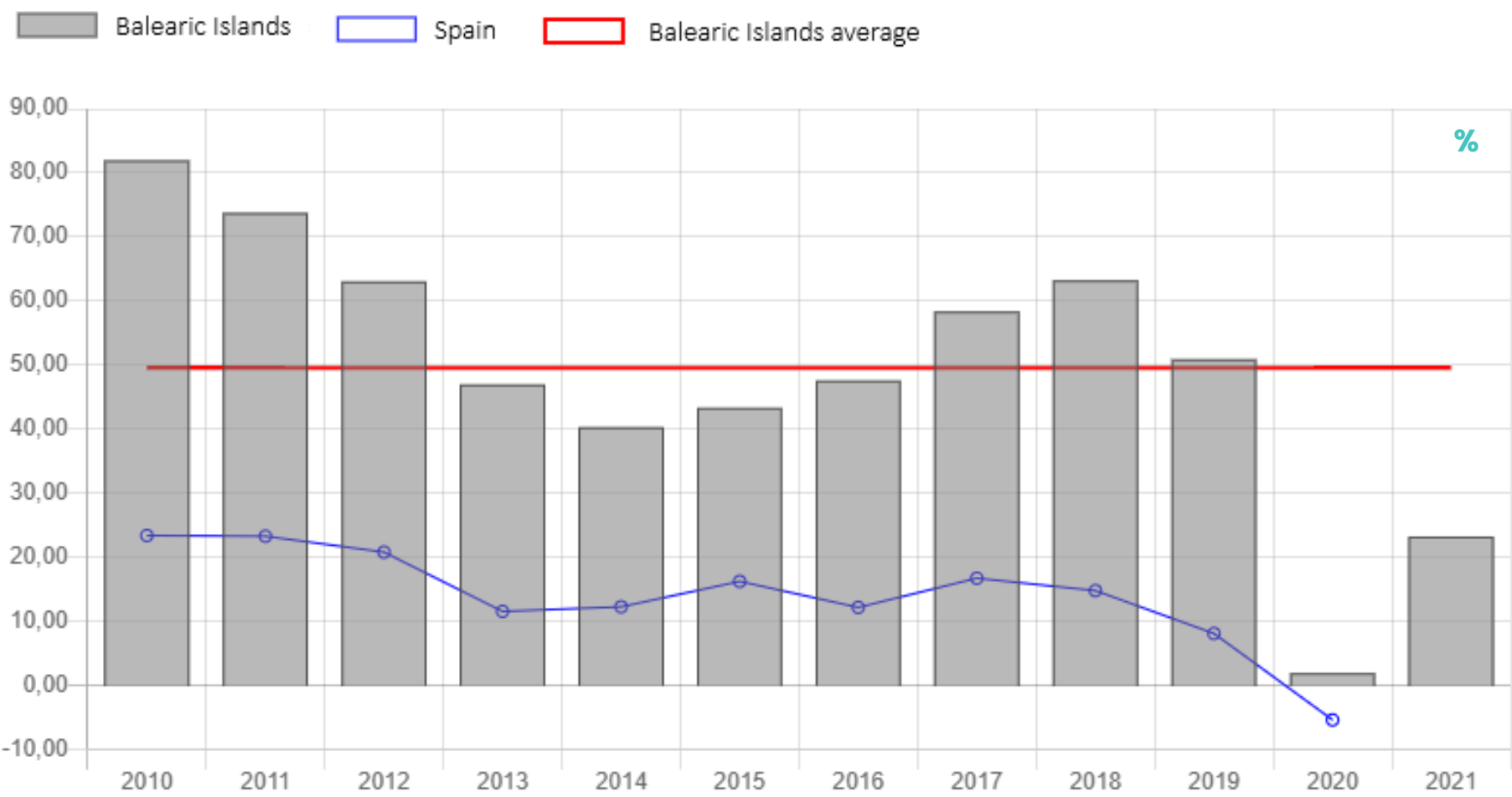
Notes: During the years 2020 and 2021 we can observe the effect of the pandemic on greenhouse gas emissions. We can see how emissions are reduced with respect to Spain, due to the fact that tourism has a greater weight in the Balearic economy and, consequently, a greater impact. We are waiting to analyse the data for the years 2022 and 2023. We will see if after the economic recovery we maintain the same distance with respect to Spain and if we reach similar values to 2019.

02 DIAGNOSIS: CLIMATE ACTION

Evolution of greenhouse gas reductions

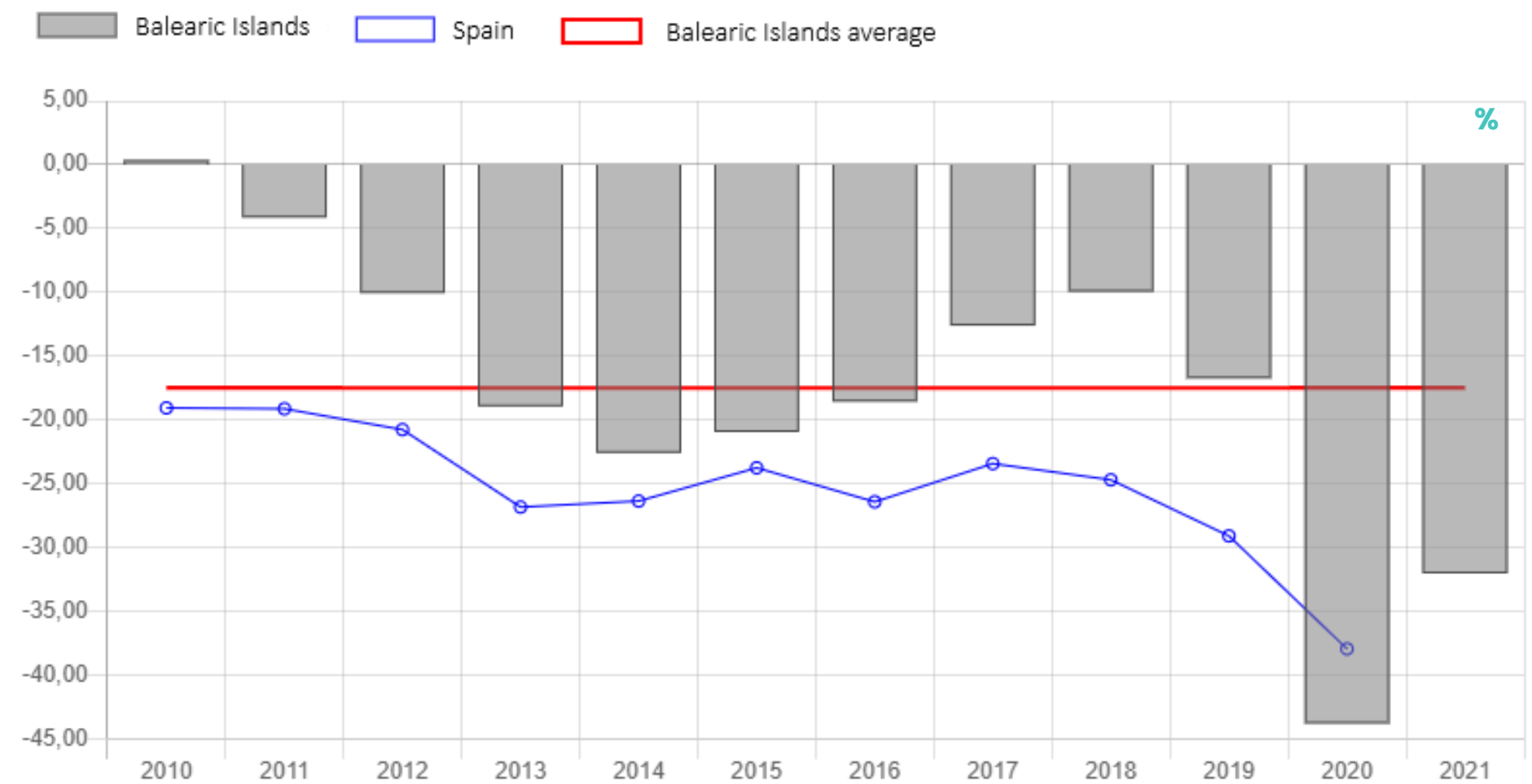
Greenhouse gas emissions compared to 1990

Source: IBESTAT - SDG indicators > Indicator 13.2.2



Greenhouse gas emissions compared to 2005

Source: IBESTAT - SDG indicators > Indicator 13.2.2



02 DIAGNOSIS: LOCAL SATISFACTION

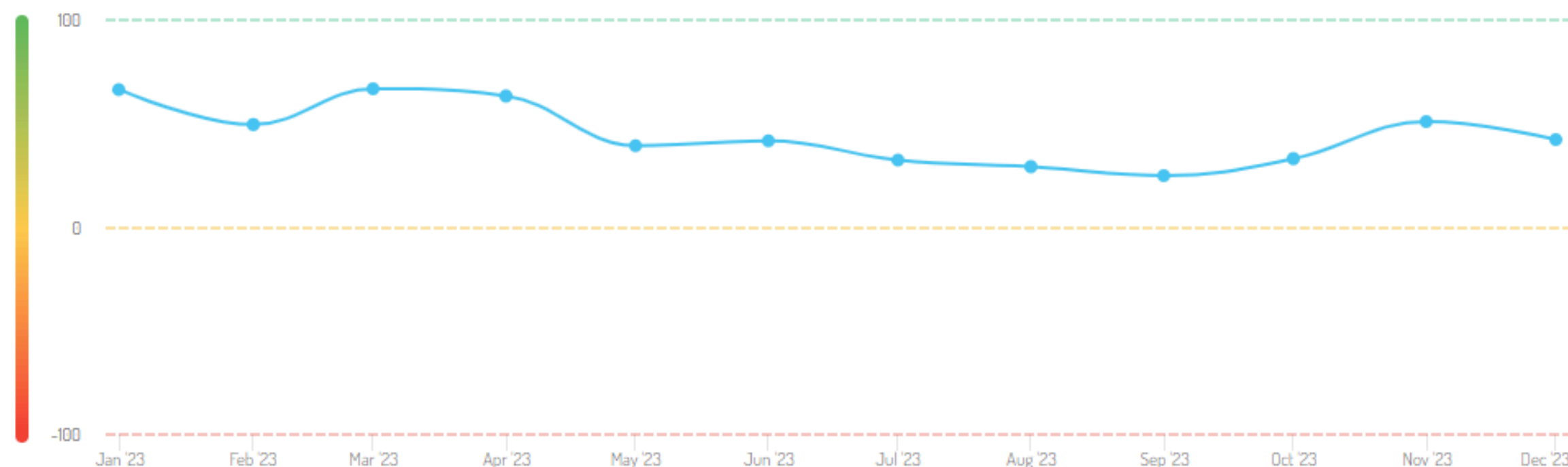
Regarding resident satisfaction with tourism, we are looking at various options:

- Conducting a resident satisfaction survey, similar to the one carried out by the Government of the Balearic Islands during the 2016-2022 period.
- Analysing data from social networks and the Internet related to tourism activity in Mallorca.

Analysis of sentiment on Mallorca in 2023

Source: Digimind

NET SENTIMENT TREND



NET SENTIMENT ⓘ



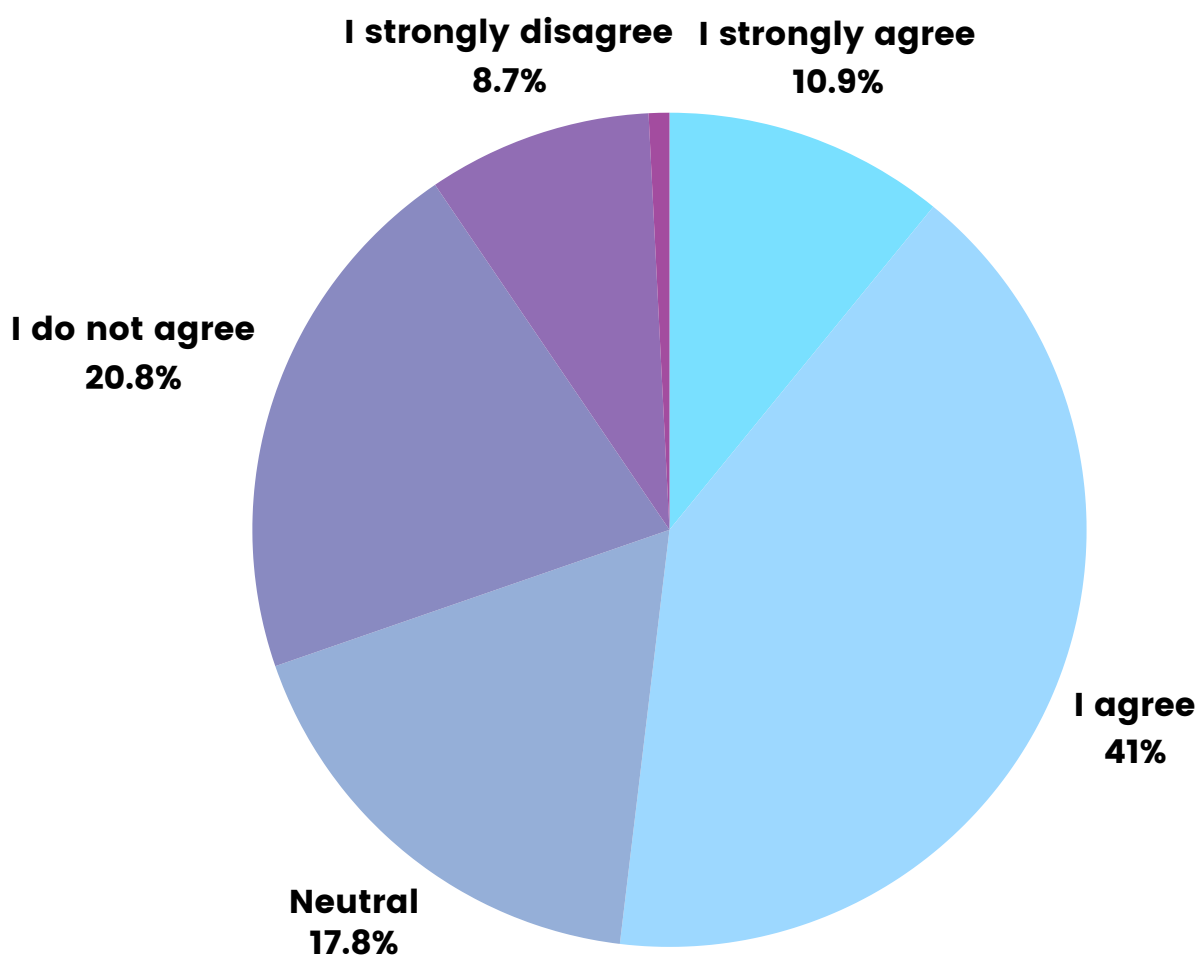
Notes: From April to September, coinciding with the medium-high tourist seasons, the trend in terms of perceived feelings about the island decreases. However, from October onwards it rises again. A priori, we could interpret this as a possible impact of citizen dissatisfaction during the months with the most tourists, but a more in-depth analysis is required in order to reach a conclusion.

02 DIAGNOSIS: LOCAL SATISFACTION

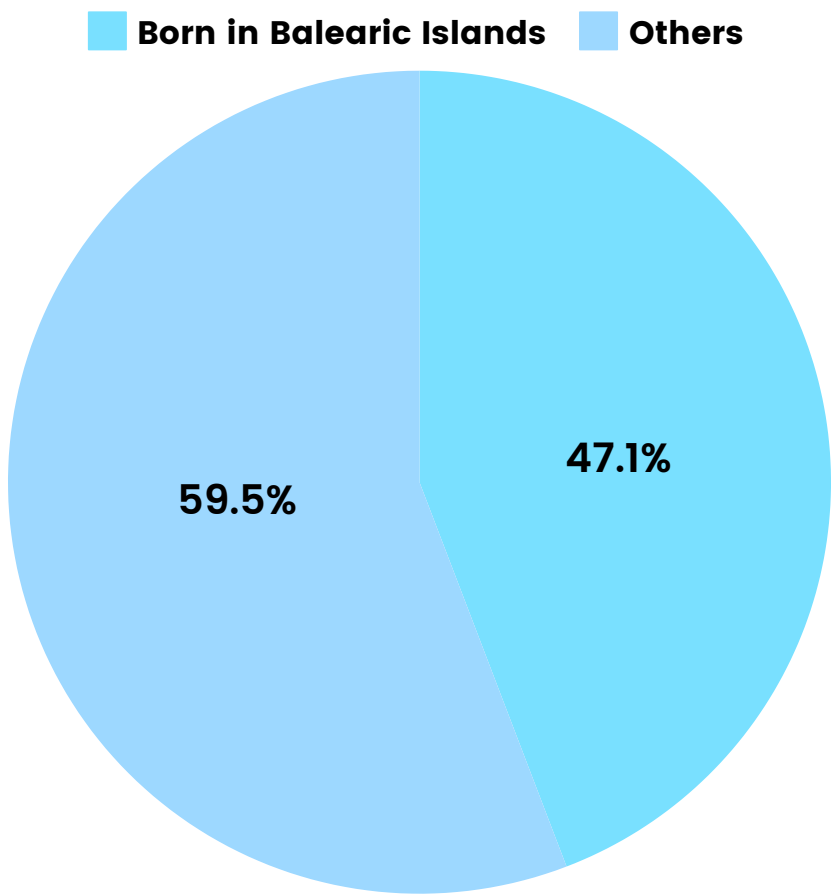
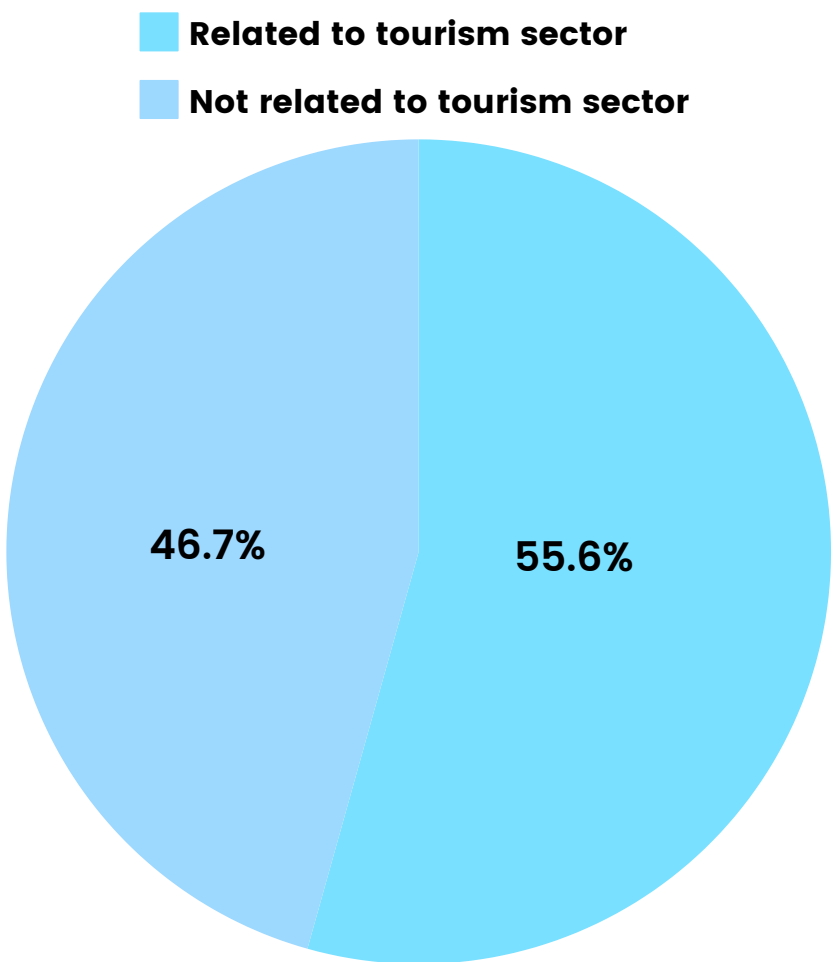
Main results of the survey of residents' opinion on tourism in the Balearic Islands 2022

Source: AETIB – Survey of residents' opinion on tourism

I am very satisfied with tourism



% with positive opinion



Notes: We observe that people related to the tourism sector (they work or have family members who work in the sector) and residents born outside the Balearic Islands have a more positive opinion. On the other hand, it can be seen that the opinion is more positive than the sentiment observed on the Internet/social networks.

03 FUTURE WORK



FUTURE WORK

During 2024 and 2025, the rest of the INSTO categories will be developed, as well as additional categories such as housing or sports tourism, resulting in a report for each category.

The tourism situation in Mallorca is marked by two key issues: tourist saturation and illegal holiday rentals. In recent years, the island has seen a steady growth in tourism, which has led to an overloading of its infrastructures and services. In 2024, more focus will be placed on monitoring illegal holiday rentals, as this is one of the main challenges facing the destination. On the other hand, during 2024-2025 it is expected to have more stable data and systems with which to face new challenges using artificial intelligence. Finally, it should be noted that work will begin on the review of the carrying capacity of the island of Mallorca.

SUSTAINABLE TOURISM OBSERVATORY OF MALLORCA

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