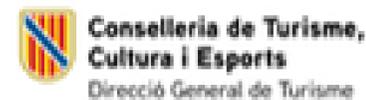


ANNUAL PROGRESS REPORT 2024



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02 Diagnosis

03 Future work

01 INTRODUCTION



Sustainable Tourism Observatory Activity

The Sustainable Tourism Observatory of Mallorca (STO Mallorca) was created within the framework of Spain's Recovery, Transformation and Resilience Plan, funded by Next Generation EU, and is aligned with the strategic plan of the Fundació Turisme Responsable de Mallorca (FTRM). Since 2021, it has been part of the UNWTO International Network of Sustainable Tourism Observatories (INSTO).

In 2024, Mallorca continued to strengthen its position as a diverse Mediterranean destination, with progress in areas such as eco-friendly accommodation, recycling, water efficiency and renewable energy. Although summer remains the main season, the island increasingly attracts visitors year-round, supported by its climate, cultural offer and the growth of sports tourism.

Throughout 2024, STO Mallorca continued expanding and refining its indicator system in line with the INSTO framework, gradually incorporating additional dimensions to strengthen the overall assessment of sustainability on the island. The Observatory also advanced its monitoring of Illegal Holiday Rentals, conducting systematic tracking of online listing platforms and establishing the first baseline, with full results to be included in the 2025 report.

This edition maintains a strongly data-driven approach, focusing on areas with consistent and reliable data. As a result, some strategic or qualitative aspects appear with less detail, which will be expanded as new sources mature. Sports Tourism has been incorporated as a complementary field of analysis due to its relevance in reducing seasonality.

The following sections present a summary of Mallorca's main indicators for 2024, structured according to the INSTO areas and complementary fields of analysis.

02 DIAGNOSIS

In this section we will show a summary of the principal indicators of Mallorca during the year 2024, according with the INSTO areas and some additional areas:



Tourism Seasonality



Employment



**Destination Economic
Benefits**



Energy Management



Water Management



**Waste Water (Sewage)
Management**



**Solid Waste
Management**



Climate Action



Accesibility



Local Satisfaction



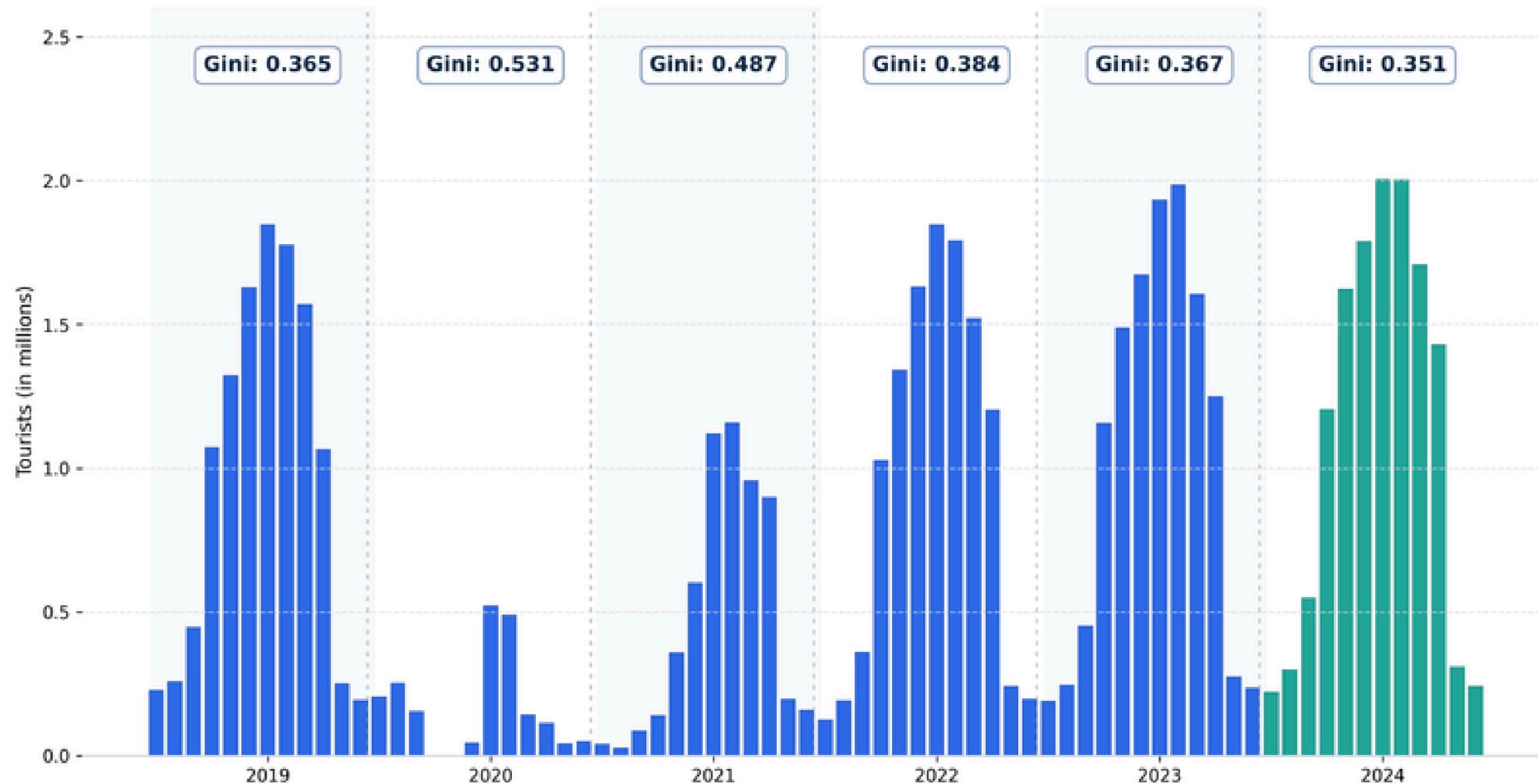
Governance

02 DIAGNOSIS: TOURISM SEASONALITY

Tourist arrivals in Mallorca and Gini Coefficient*

Tourists from the Balearic Islands are excluded.

Source: IBESTAT - Tourist movements at the border



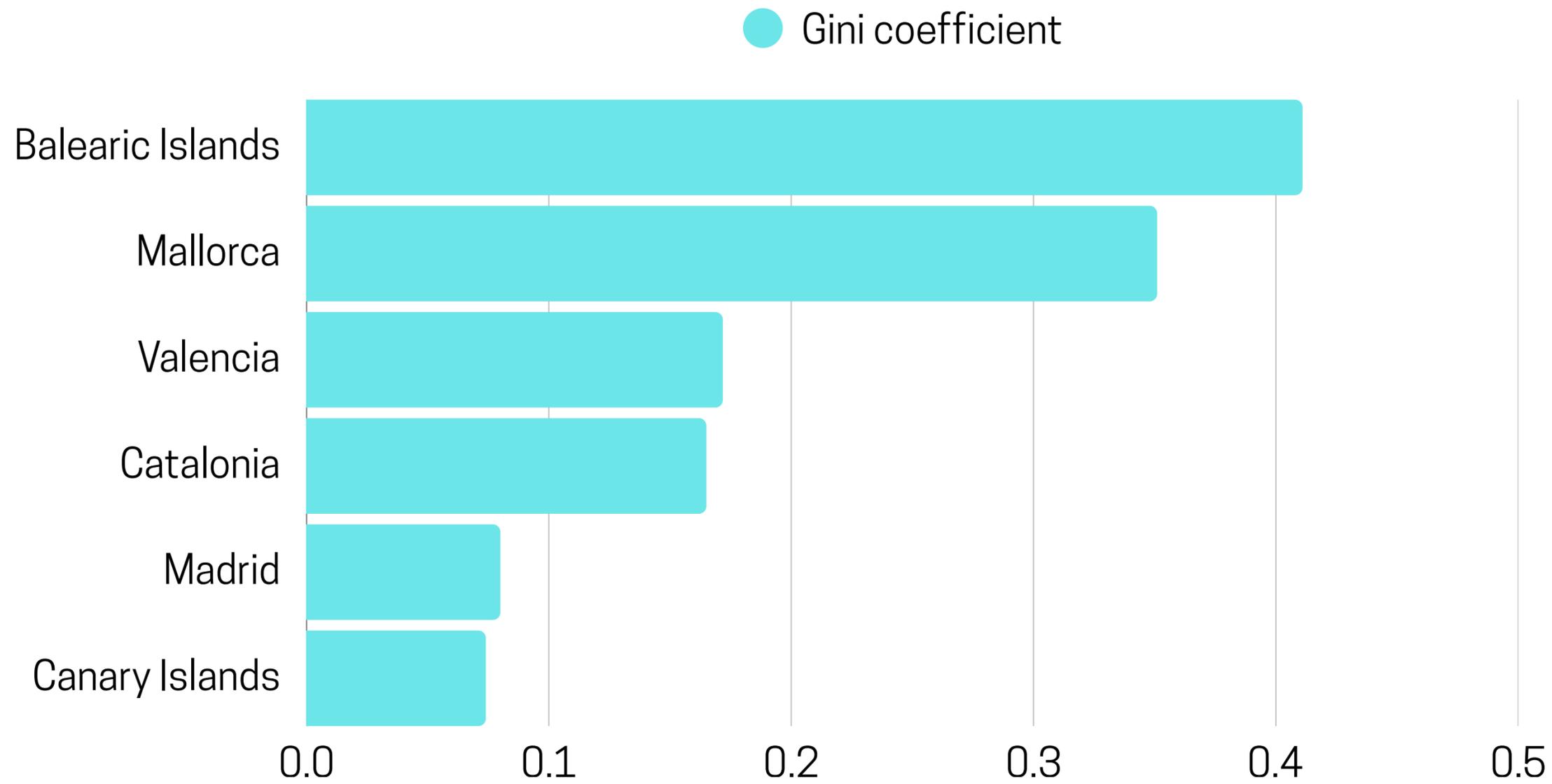
Notes:

In 2024, Mallorca records the lowest Gini coefficient in the series (0.351). This value is slightly lower than in 2019 and 2023, indicating a more even monthly distribution of tourist arrivals. The results suggest that tourism was more evenly spread throughout the year, with higher activity during the off-season months.

*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

Gini Coefficient at tourist arrivals in Spanish destinations



Notes:

In 2024, Mallorca records a Gini coefficient of 0.351, improving both its own result from the previous year and the overall Balearic Islands average (0.411). This means that the distribution of tourist arrivals throughout the year is becoming more balanced on the island.

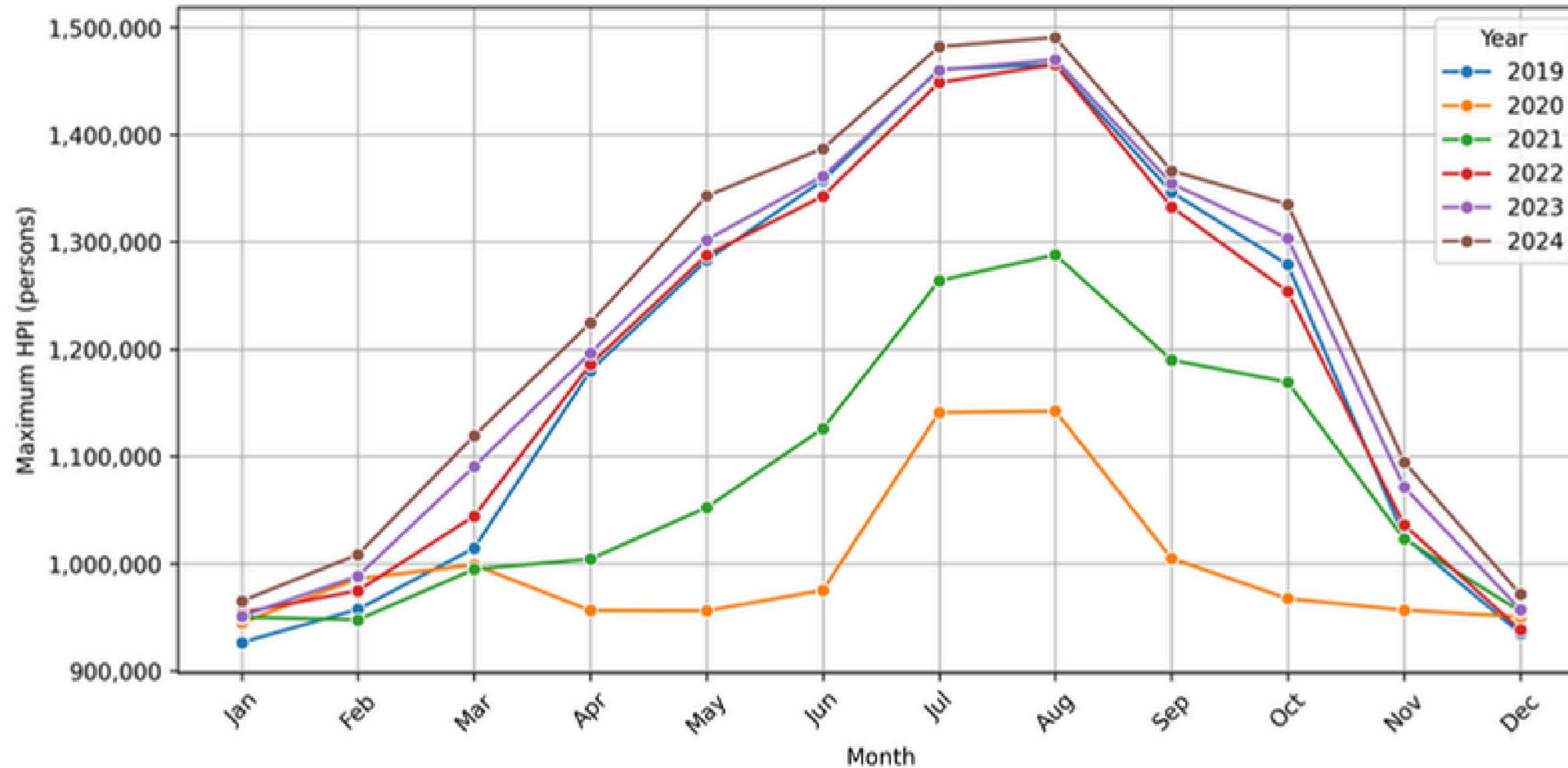
While Mallorca still shows greater seasonality than other major Spanish destinations such as Valencia, Catalonia, Madrid, or the Canary Islands, the data confirm a steady reduction in seasonal concentration.

Source: [IBESTAT - Tourist movements at the border](#)

02 DIAGNOSIS: TOURISM SEASONALITY

Monthly maximum human pressure index in Mallorca

Source: IBESTAT - Human Pressure Indicator

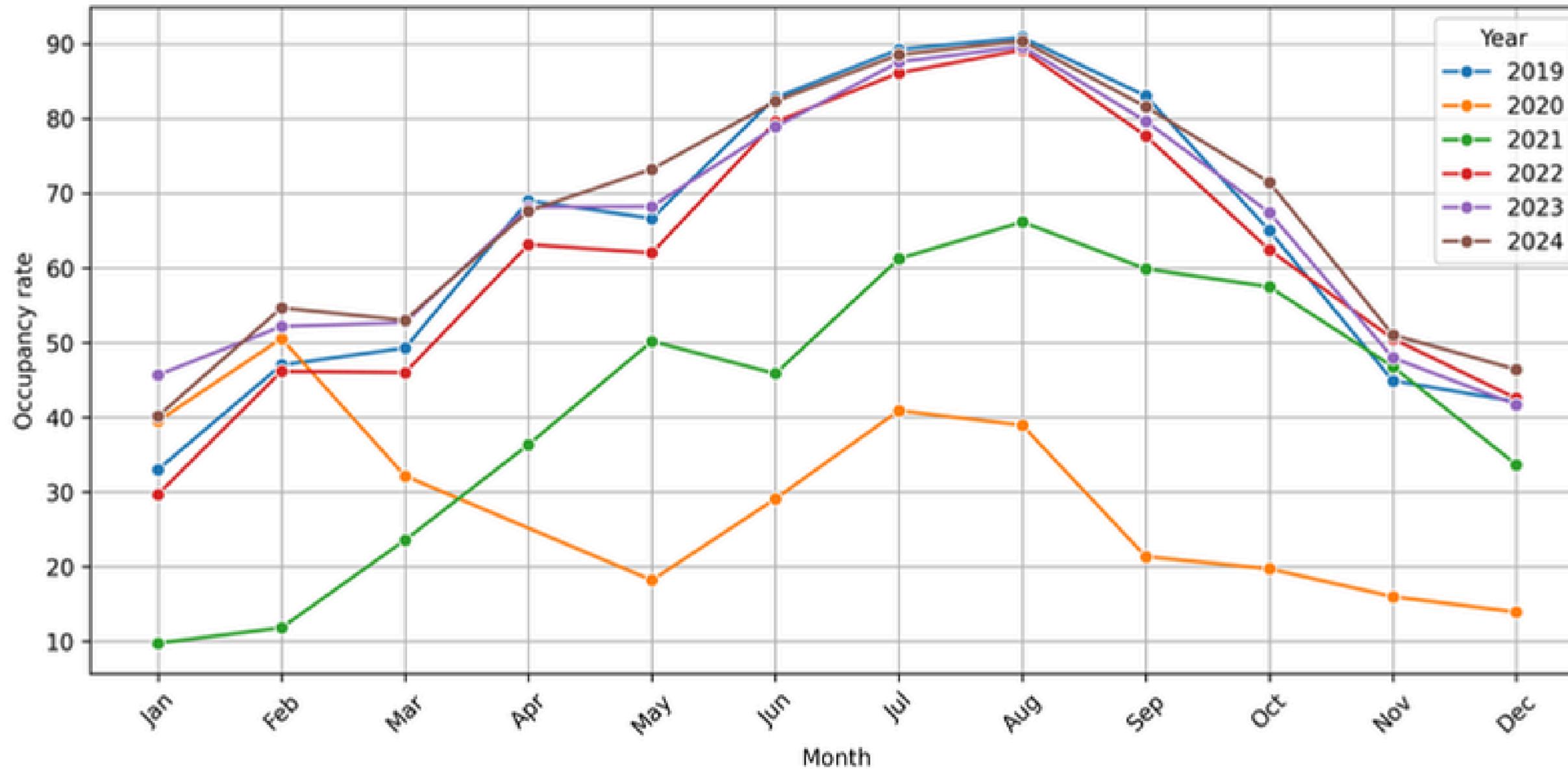


Notes:

Between 2019 and 2024, the Human Pressure Indicator (HPI) in Mallorca shows a clear recovery and stabilization after the pandemic period. The number of people present on the island has grown steadily, with 2024 reaching the highest levels in the entire series. Compared to previous years, the increase observed in May and October is particularly significant, suggesting an extension of the tourism season. This evolution points to a return to full activity with signs of greater temporal balance in tourist presence.

02 DIAGNOSIS: TOURISM SEASONALITY

Annual occupancy rate of hotels in Mallorca



Notes:

The occupancy rate shows a steady upward trend over the years, with 2024 reaching slightly higher levels than before the pandemic. The pattern remains similar across seasons, but occupancy in May and October has increased notably, indicating stronger activity during the shoulder months.

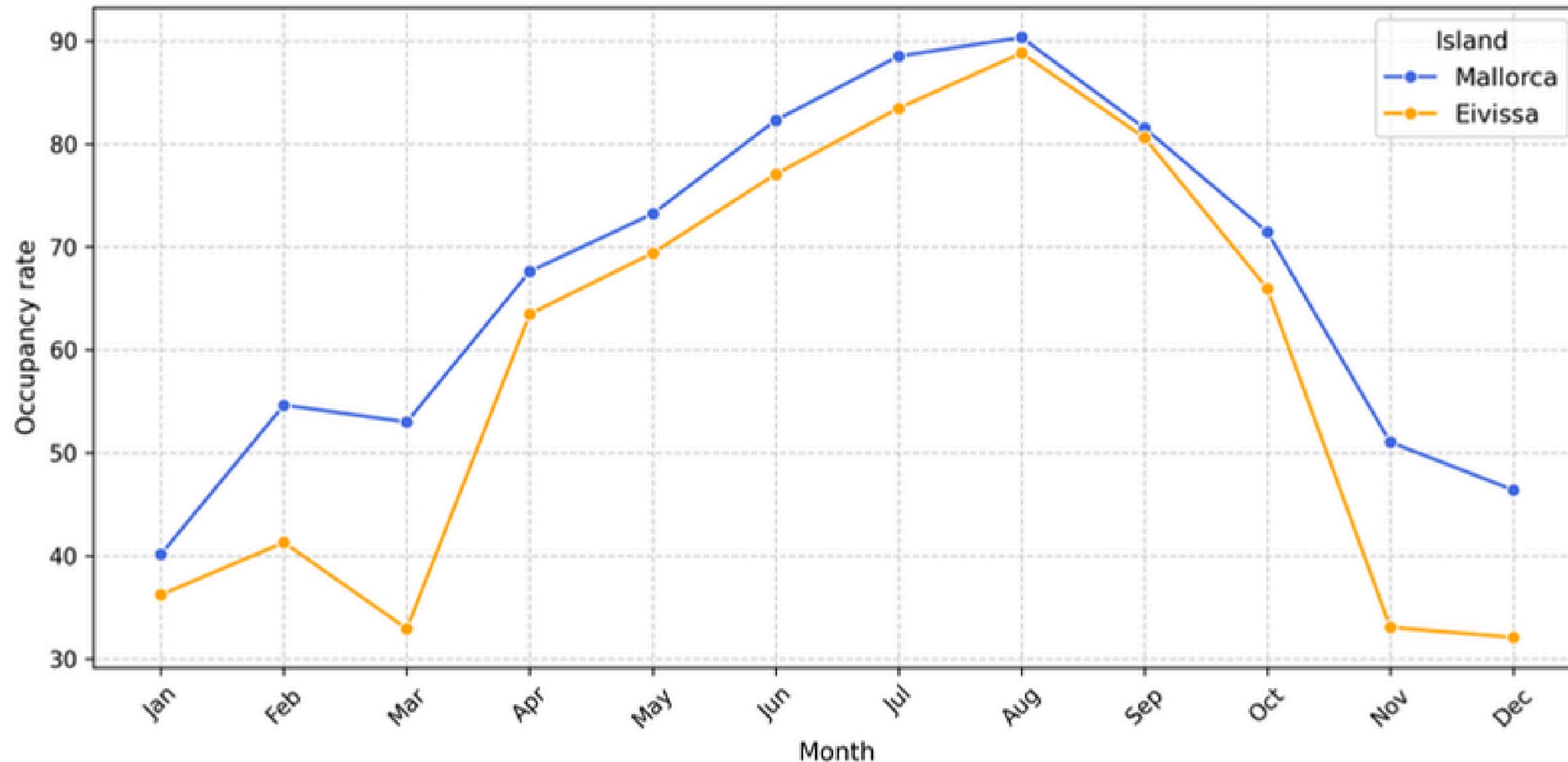
Source: IBESTAT - Hotel Occupancy Survey.

02 DIAGNOSIS: TOURISM SEASONALITY

For context, we compare two key destinations in the Balearic Islands: Mallorca and Eivissa. These islands were selected because they are major destinations with data available for the entire year.

Annual occupancy rate of hotels – Mallorca vs Ibiza

Source: IBESTAT – Hotel Occupancy Survey

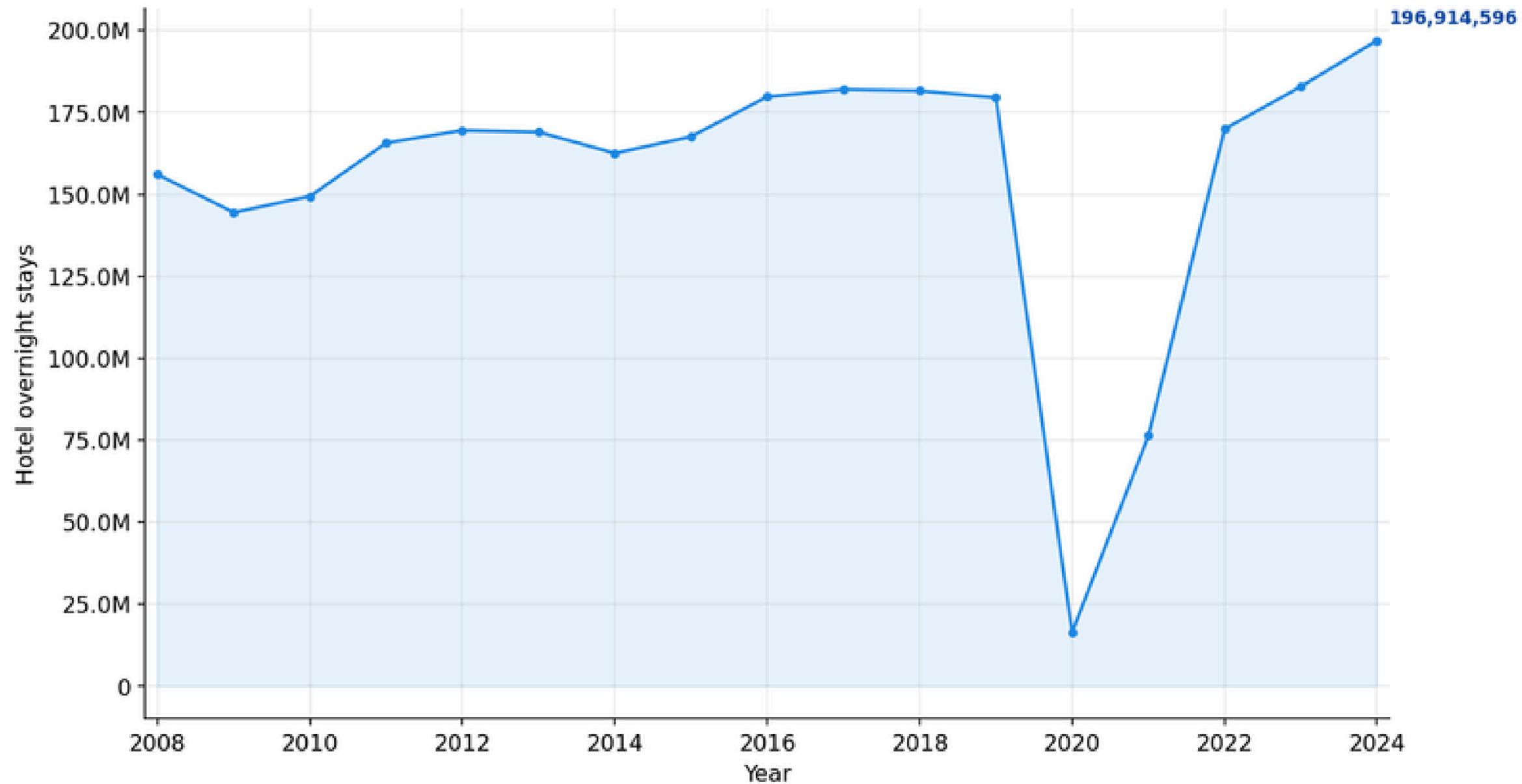


Notes:

Mallorca shows higher occupancy rates than Eivissa throughout the year, especially between January and May, as well as from October onwards. Both islands reach similar peaks in July and August, but Eivissa experiences a sharper decline after the summer, while Mallorca maintains higher occupancy during the shoulder months. This suggests a longer active season in Mallorca compared to Eivissa.

02 DIAGNOSIS: TOURISM SEASONALITY

Hotel overnight stays



Notes:

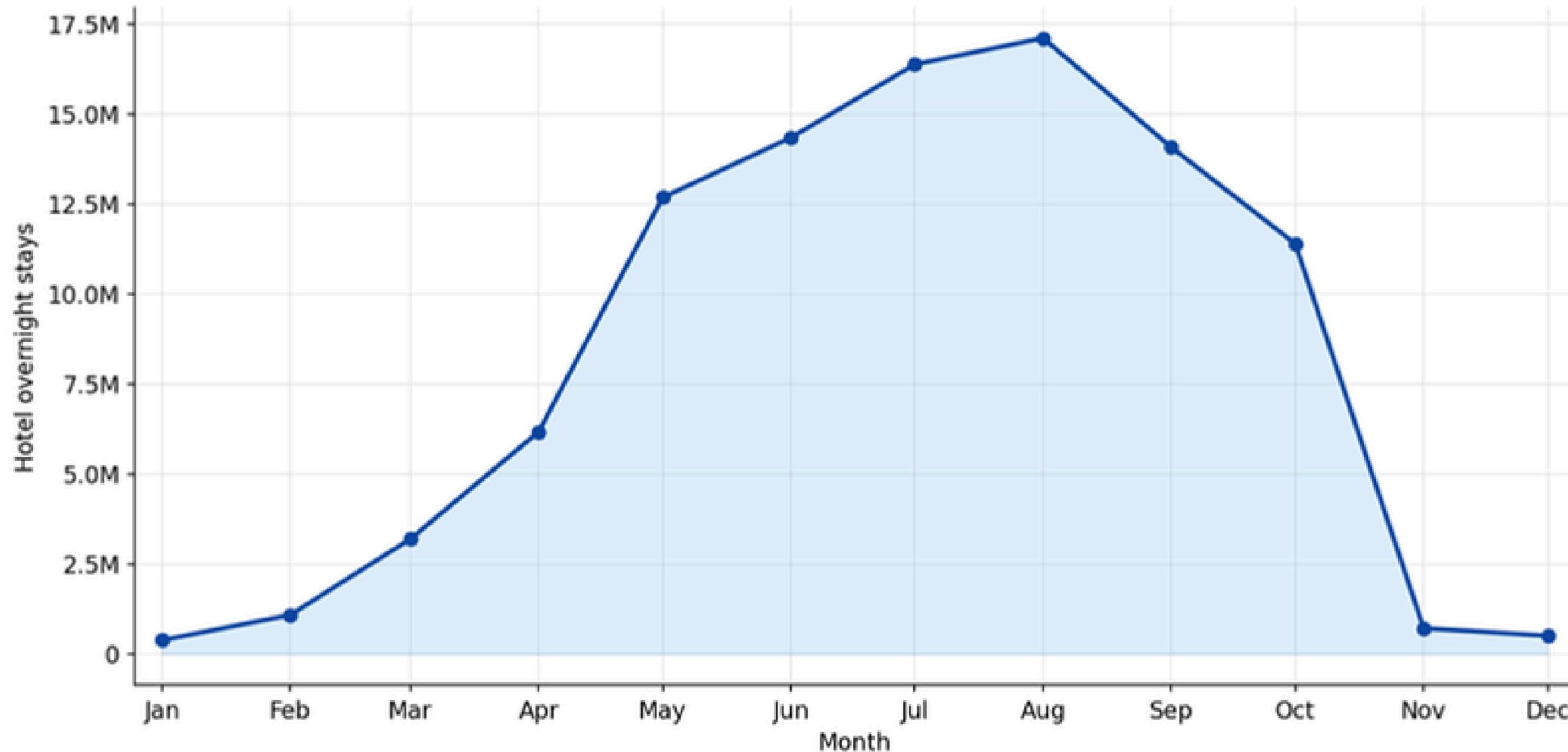
Hotel overnight stays in Mallorca reached around 196 million in 2024, the highest value in the available series. After the drop caused by the pandemic in 2020, the recovery has been steady, with figures surpassing pre-pandemic levels from 2023 onwards. The data show a return to stable demand in the island's accommodation sector.

Source: IBESTAT - Hotel Occupancy Survey

02 DIAGNOSIS: TOURISM SEASONALITY

Hotel overnight stays in 2024

Source: IBESTAT - Hotel Occupancy Survey

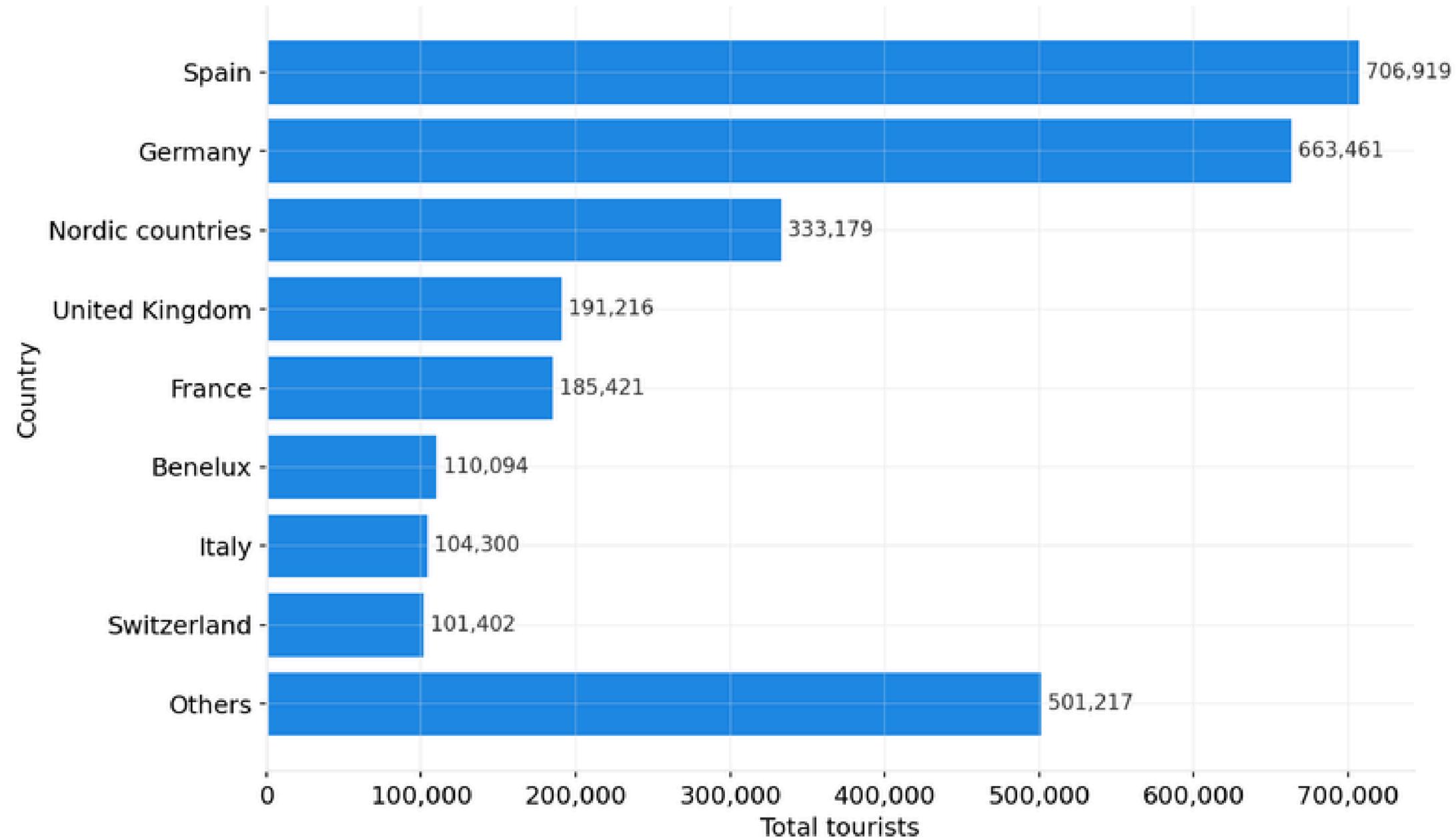


Notes:

In 2024, hotel overnight stays in Mallorca reflect the rhythm of the island's tourism cycle. The steady rise from early spring and the pronounced summer peak illustrate how accommodation activity adapts to the annual flow of visitors. The pattern remains consistent with previous years, showing that the island continues to depend heavily on the high summer season, while maintaining a moderate but stable level of activity during the rest of the year.

02 DIAGNOSIS: SPORT TOURISM

Origin of Tourists Engaged in Sports Activities (2023)



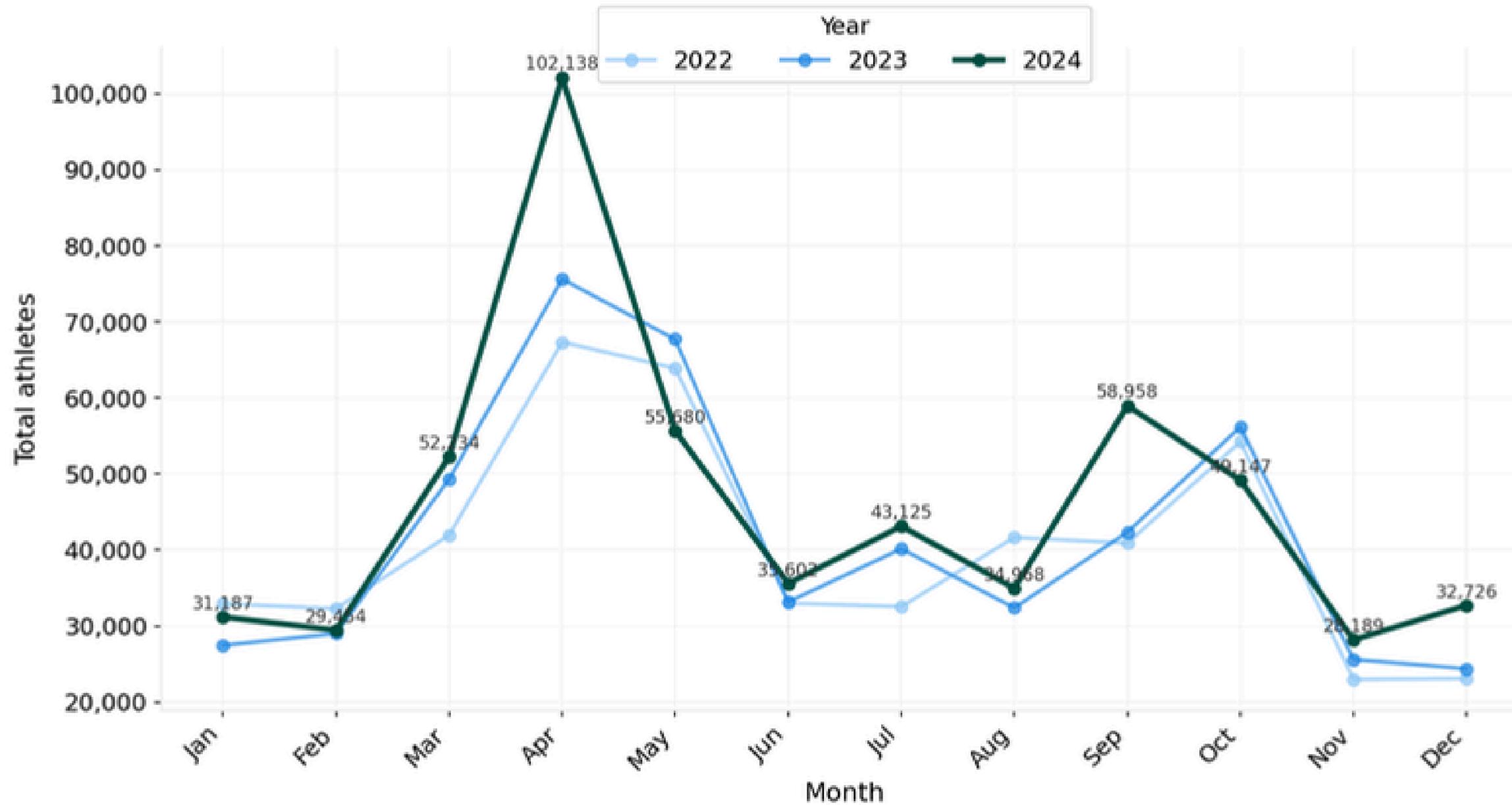
Notes:

In 2023, Spain and Germany were the main source markets for tourists visiting Mallorca for sports activities, together accounting for more than half of the total arrivals. The Nordic countries also represent a significant share, followed by the United Kingdom and France. Other European markets such as Benelux, Italy and Switzerland contribute smaller but consistent numbers. The data confirm Mallorca's strong appeal as a sports tourism destination, particularly among European visitors.

Source: AETIB

02 DIAGNOSIS: SPORT TOURISM

Evolution of Cyclists and Runners



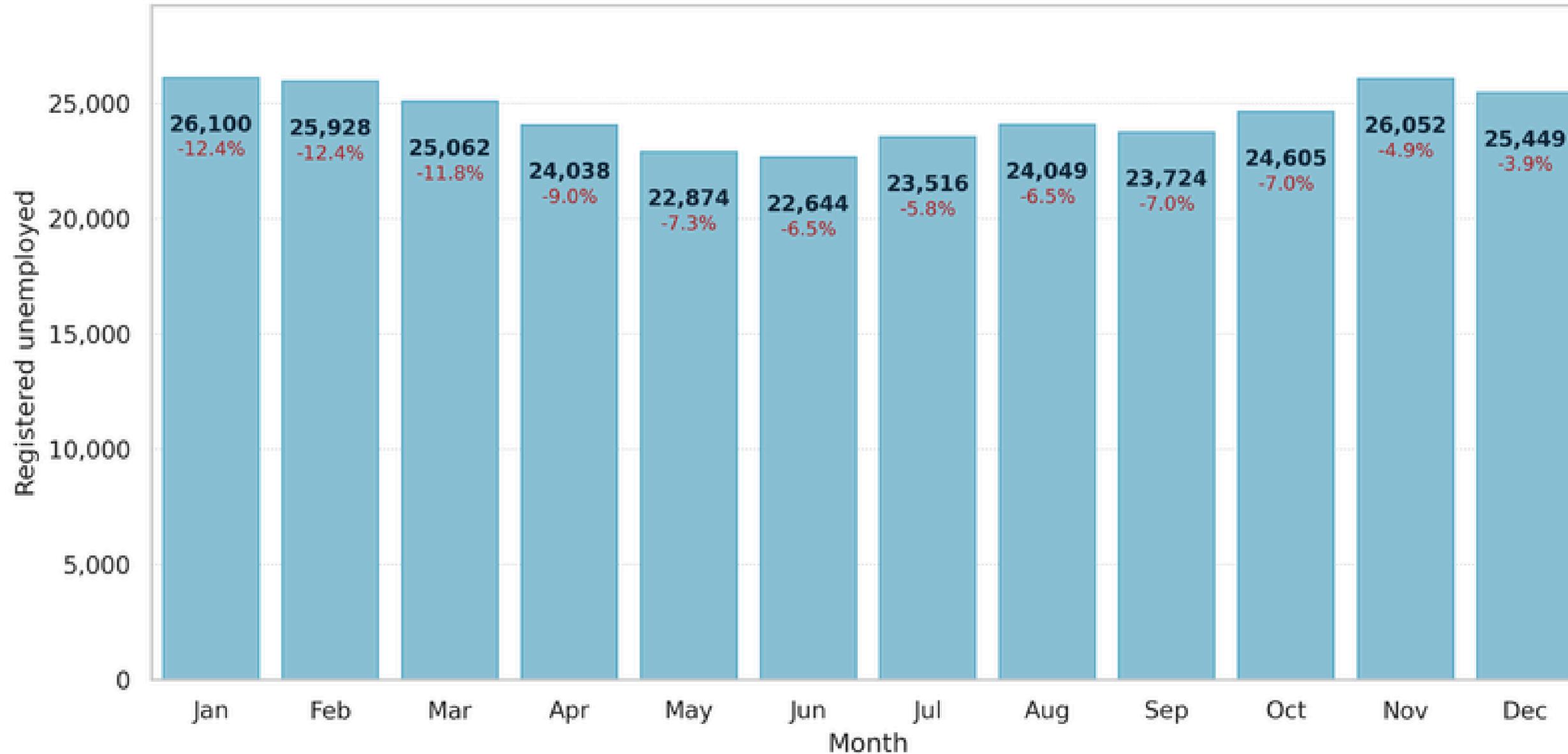
Source: Strava

Notes:

The number of cyclists and runners visiting the Balearic Islands in 2024 shows a clear seasonal trend, with activity peaking in April, when more than 100,000 athletes were recorded. This marks a significant increase compared to previous years, confirming the islands' strong appeal as a training destination during spring. Participation decreases in the summer months and rises again in autumn, reflecting the island's popularity among endurance athletes seeking favourable weather and suitable conditions outside the high tourist season.

02 DIAGNOSIS: EMPLOYMENT

Registered unemployed in Mallorca



Notes:

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

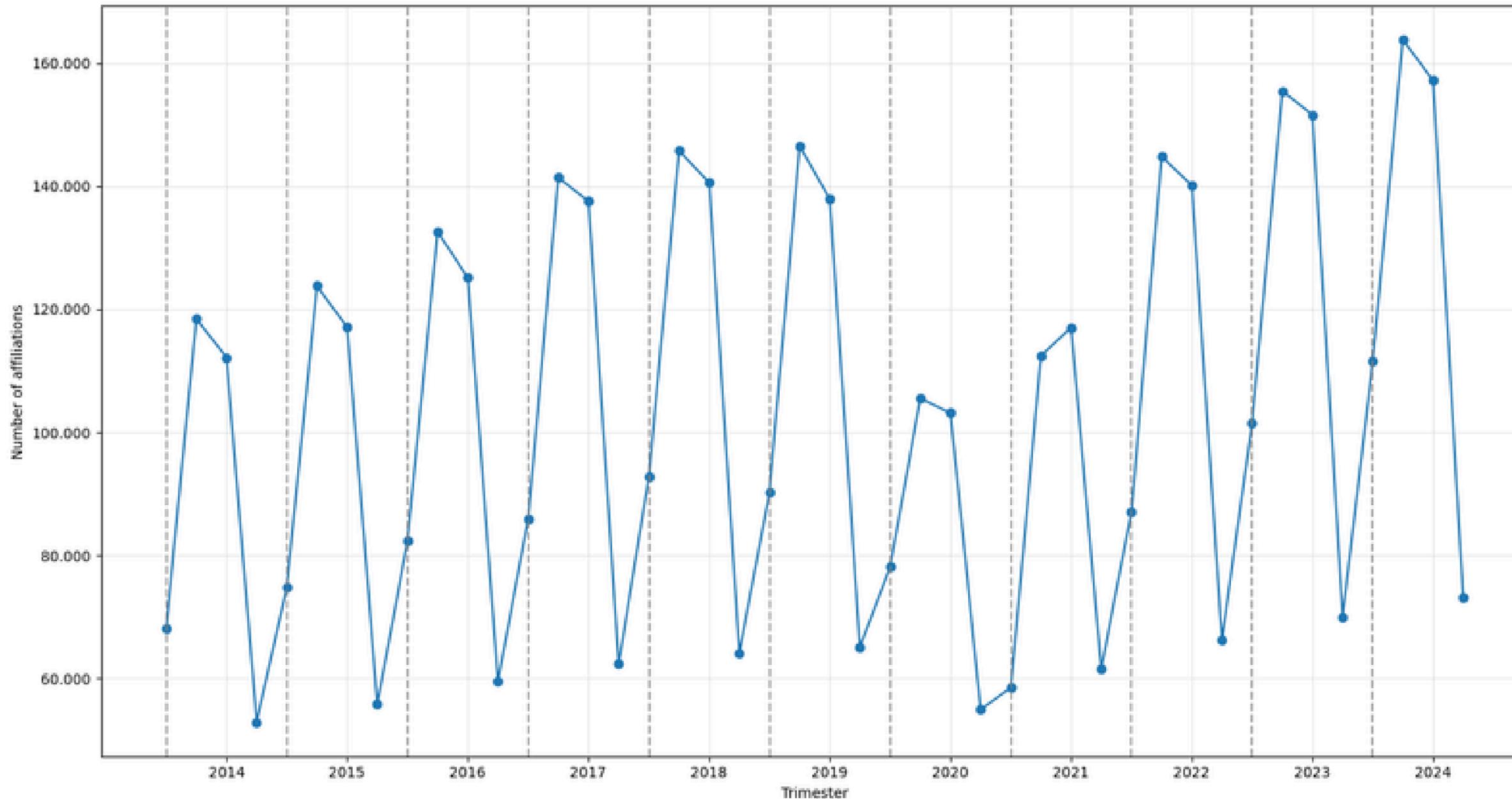
Registered unemployment in Mallorca decreases from January to June, reaching its lowest point in early summer, and then rises again towards the end of the year. Throughout 2024, the number of unemployed people remains below the levels recorded in the previous year, with year-on-year reductions ranging between 3% and 13%.

Source: IBESTAT - Registered unemployed and job seekers

02 DIAGNOSIS: EMPLOYMENT

Evolution of social Security affiliations in the tourism sector

2023 vs 2024 YoY -> Q1: +9,91% Q2: +5,35% Q3: +3,67% Q4: +4,44%



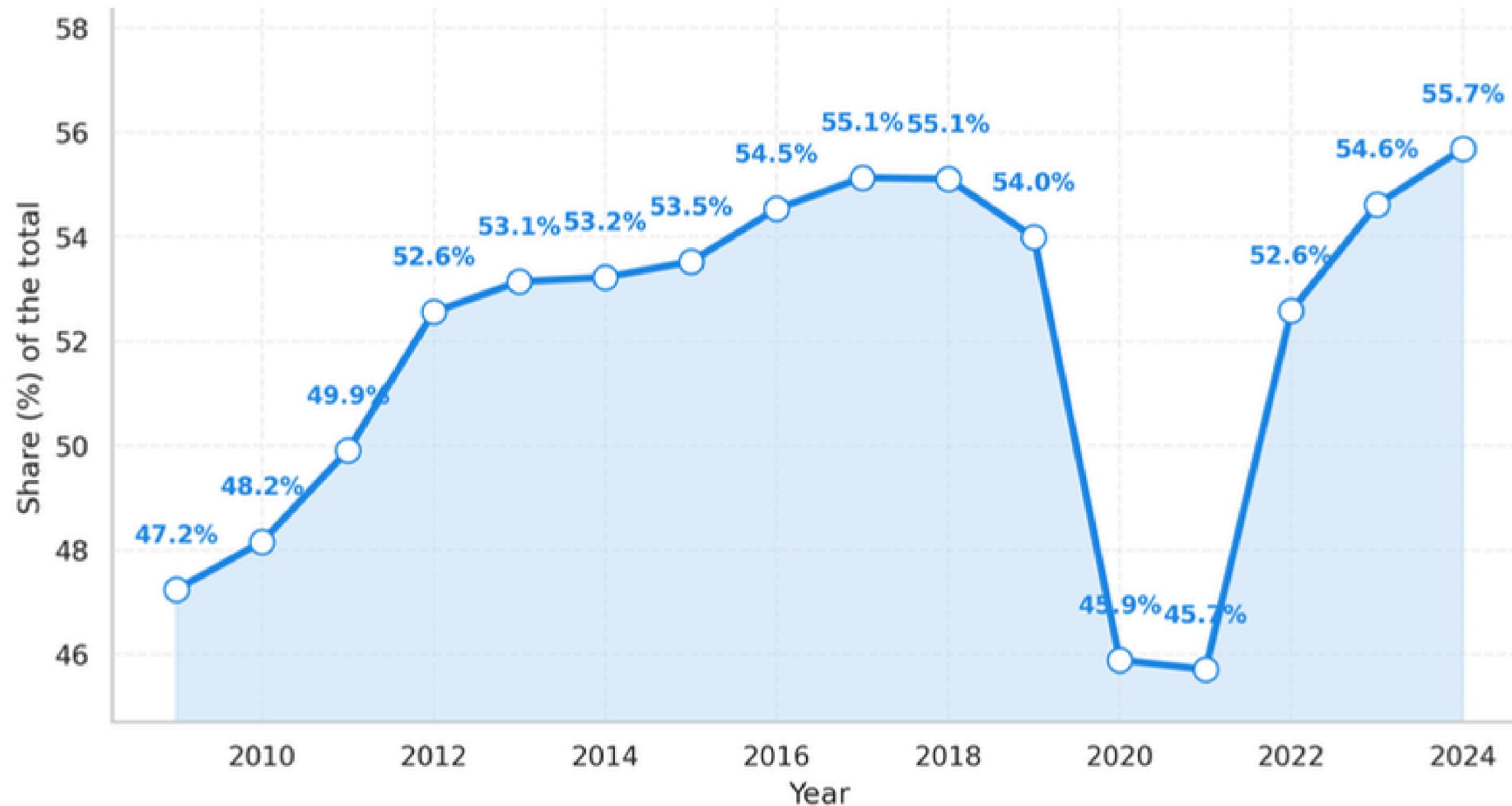
Notes:

The number of social security affiliations in tourism-related activities in Mallorca shows a clear seasonal pattern over the past decade. Peaks occur each summer, coinciding with the high tourism season, and drop sharply during winter. Despite this cyclical behavior, the overall trend is upward, with 2024 reaching the highest levels of employment in the series, confirming the sector's continued importance in the island's economy.

Source: IBESTAT - Social Security affiliations in the tourism sector

02 DIAGNOSIS: EMPLOYMENT

Tourism sector share of Social Security affiliations



Notes:

The chart shows the share of Social Security affiliations in the tourism sector over the total for Mallorca between 2009 and 2024. The data reveal a steady increase from 47.2% in 2009 to around 55% in 2018, followed by a sharp drop in 2020–2021 due to the pandemic. From 2022 onwards, the share rises again, reaching 55.7% in 2024 – the highest value in the series. Overall, the tourism sector’s relative weight in total employment has not only recovered but slightly surpassed pre-pandemic levels.

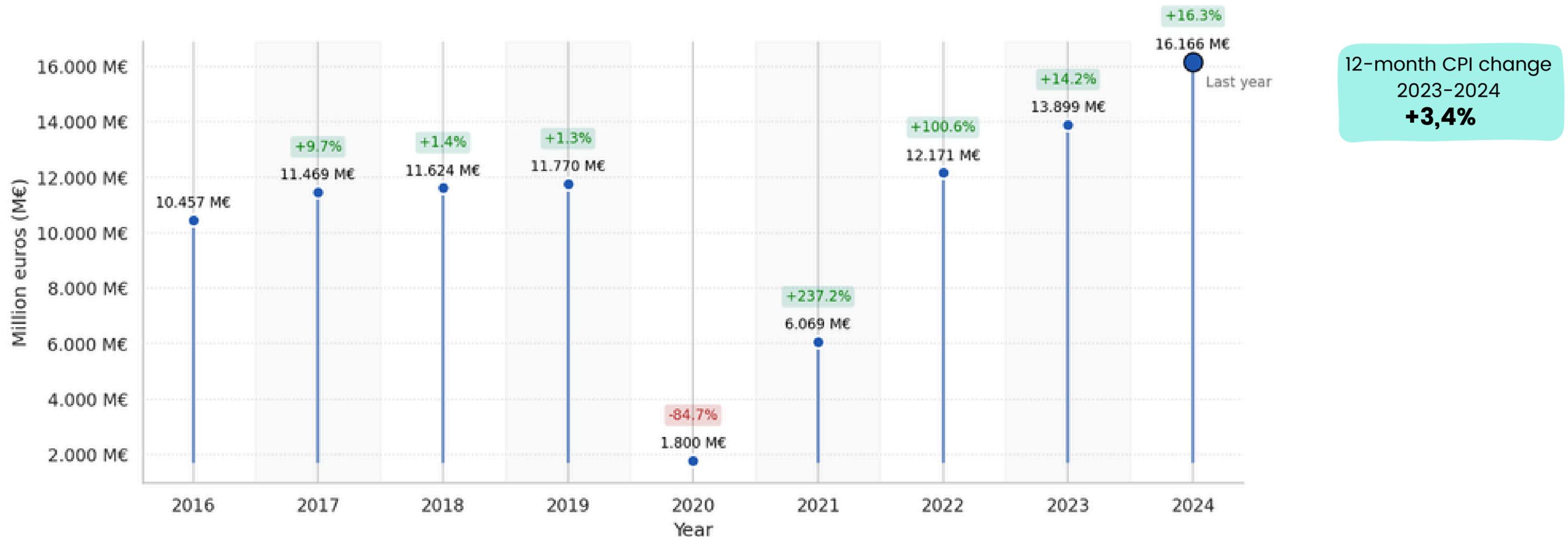
Source: IBESTAT – Social Security affiliations in the tourism sector

02 DIAGNOSIS: DESTINATION ECONOMIC BENEFITS

Evolution of tourist spending in Mallorca

The chart shows the evolution of total tourism expenditure in Mallorca between 2016 and 2024. After steady growth up to 2019 (reaching 11,770 million euros), expenditure dropped sharply in 2020 (-84.7%) due to the pandemic. From 2021 onwards, recovery was rapid, with values doubling in 2022 and continuing to rise in 2023 and 2024. The latest figure, 16,166 million euros, represents a 16.3% increase over the previous year and the highest level in the entire series.

Tourists from the Balearic Islands are excluded.



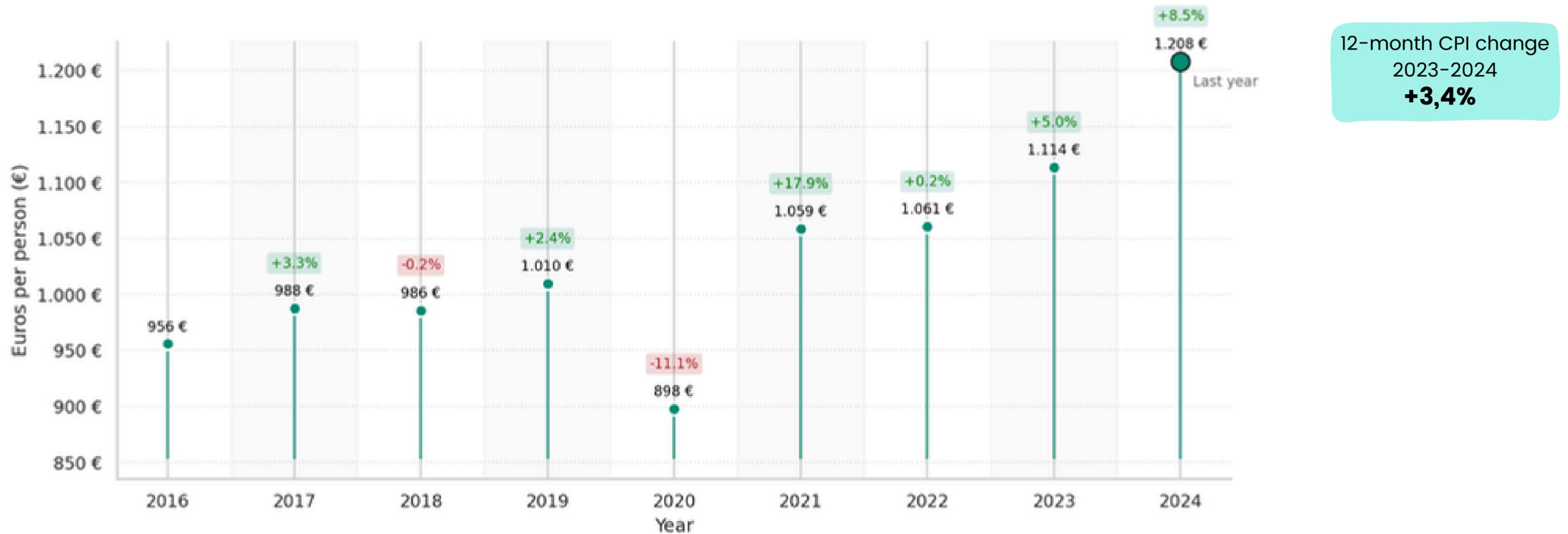
Source: IBESTAT - Tourism Expenditure Survey

02 DIAGNOSIS: DESTINATION ECONOMIC BENEFITS

Evolution of tourist spending in Mallorca

Average tourist expenditure per person in Mallorca reached 1,208 euros in 2024, an increase of 8.5% compared with the previous year. This continues the upward trend observed since 2021, following the recovery after the pandemic. The growth in average spending suggests that visitors are contributing more individually to the local economy, even as the total number of visitors remains relatively stable.

Tourists from the Balearic Islands are excluded.



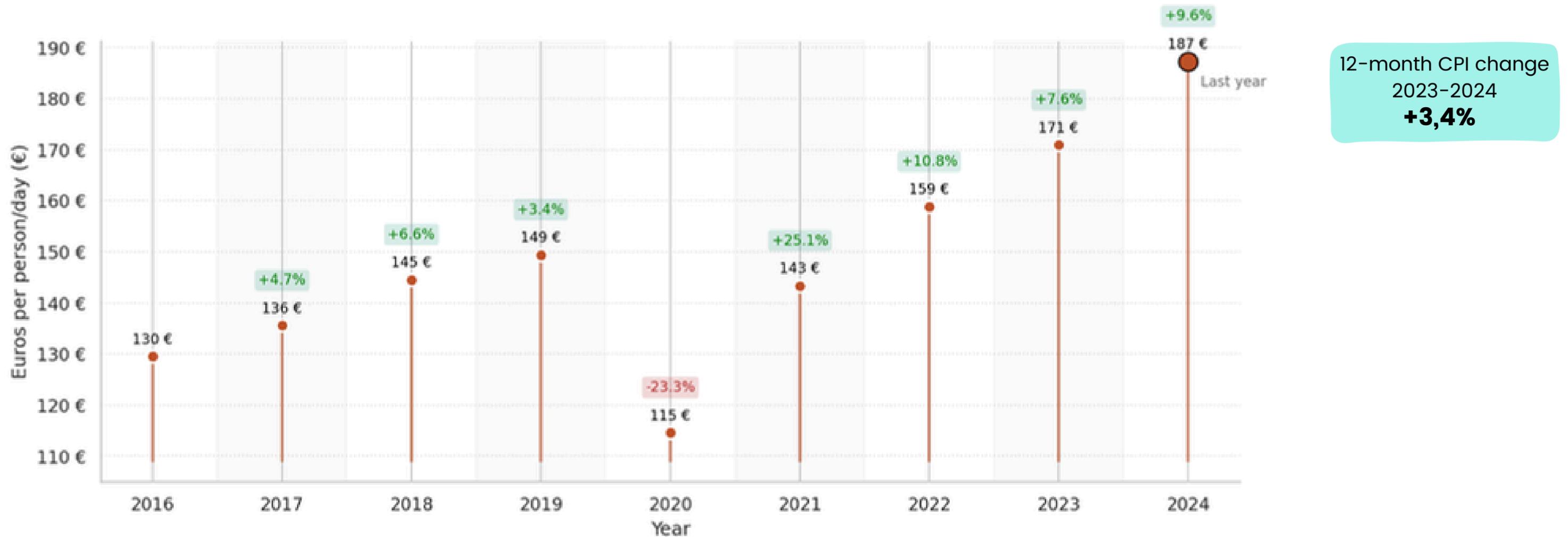
Source: IBESTAT - Tourism Expenditure Survey

02 DIAGNOSIS: DESTINATION ECONOMIC BENEFITS

Evolution of tourist spending in Mallorca

Both indicators of tourist expenditure show continued growth in 2024. Average expenditure per person reached 1,208 euros (+8.5%), while daily expenditure rose to 187 euros (+9.6%). This means that, even with similar visitor numbers, individual tourists are spending more during their stays. The trend observed since 2021 confirms a steady increase in average spending, suggesting changes in visitor profiles and consumption patterns across the island's tourism offer.

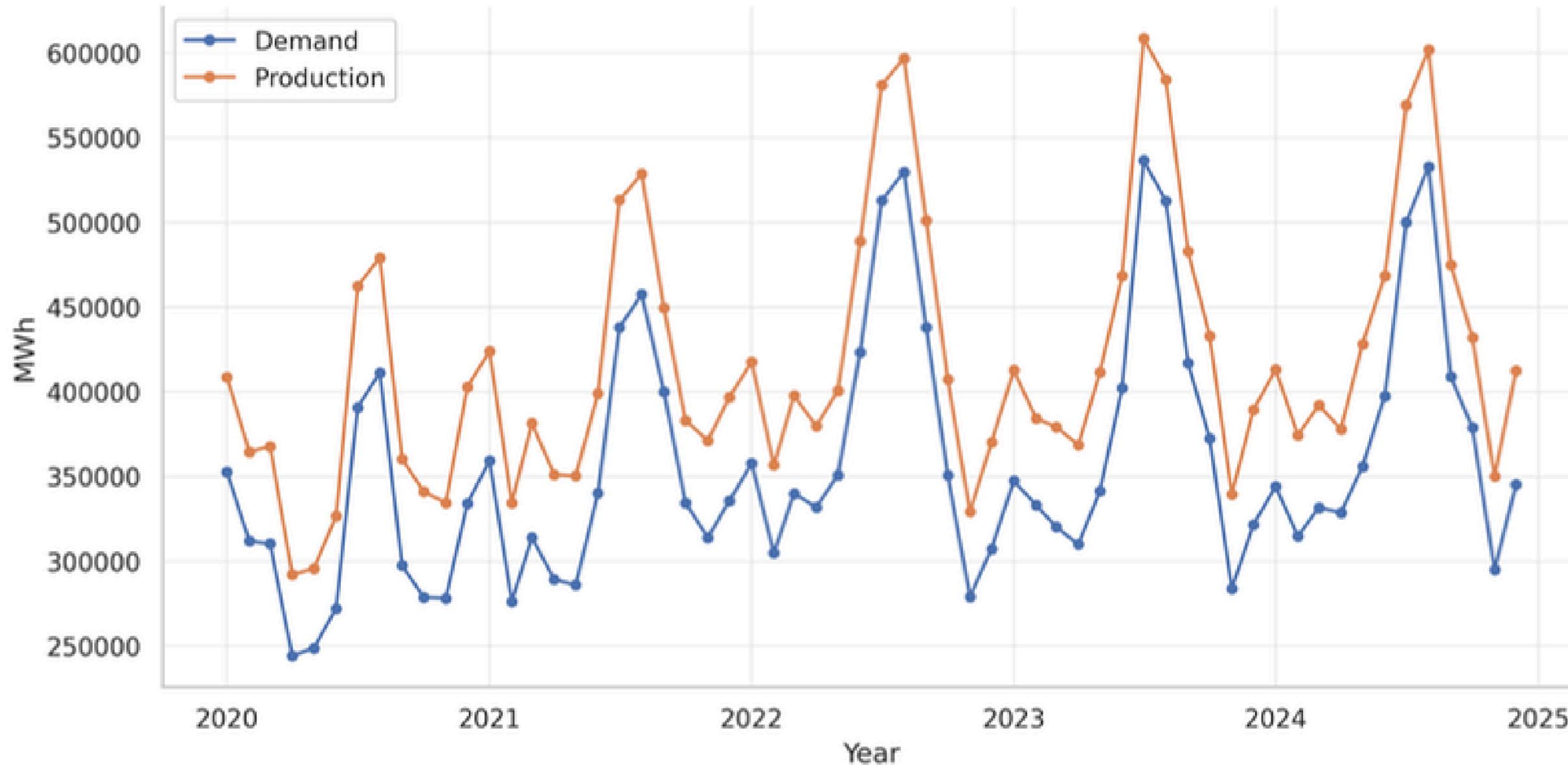
Tourists from the Balearic Islands are excluded.



Source: IBESTAT - Tourism Expenditure Survey

02 DIAGNOSIS: ENERGY MANAGEMENT

Energy produced vs energy consumed in Mallorca



Notes:

The chart shows monthly electricity production and demand in Mallorca between 2020 and 2024. The data for 2024 follow the same general pattern observed in previous years, with production remaining slightly above demand. This difference reflects the balance maintained between generation and consumption across the period. Both series display a seasonal pattern, with higher values during the summer months and lower levels in winter.

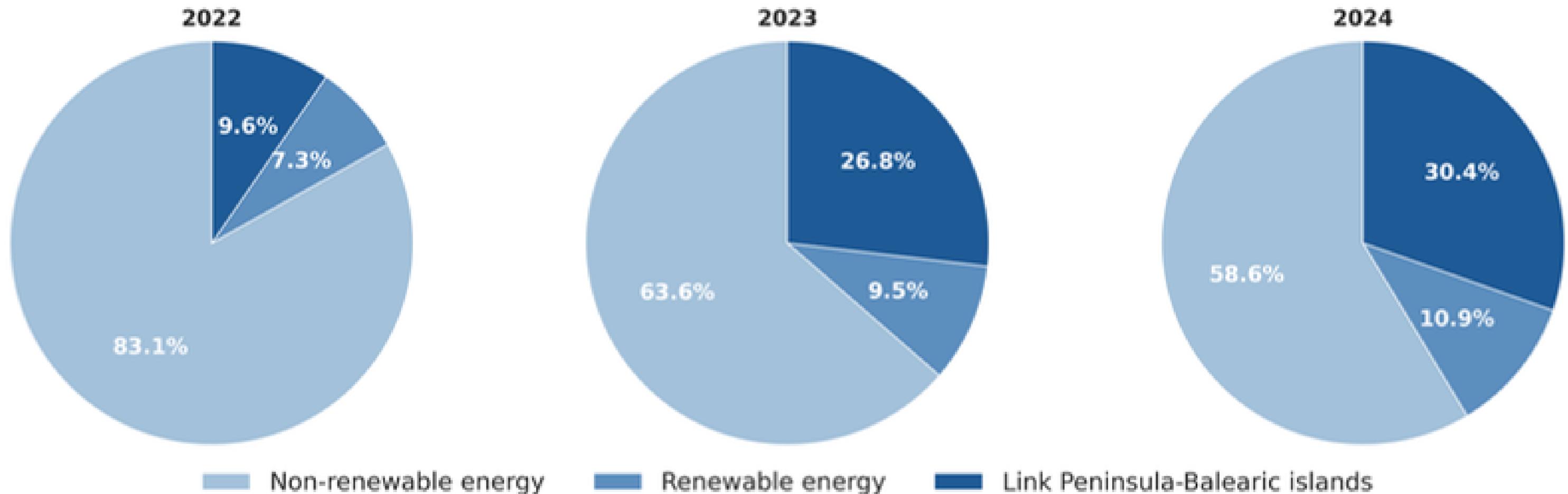
Source: IBESTAT - Electricity production and demand

02 DIAGNOSIS: ENERGY MANAGEMENT

Type of energy produced in Mallorca

Notes:

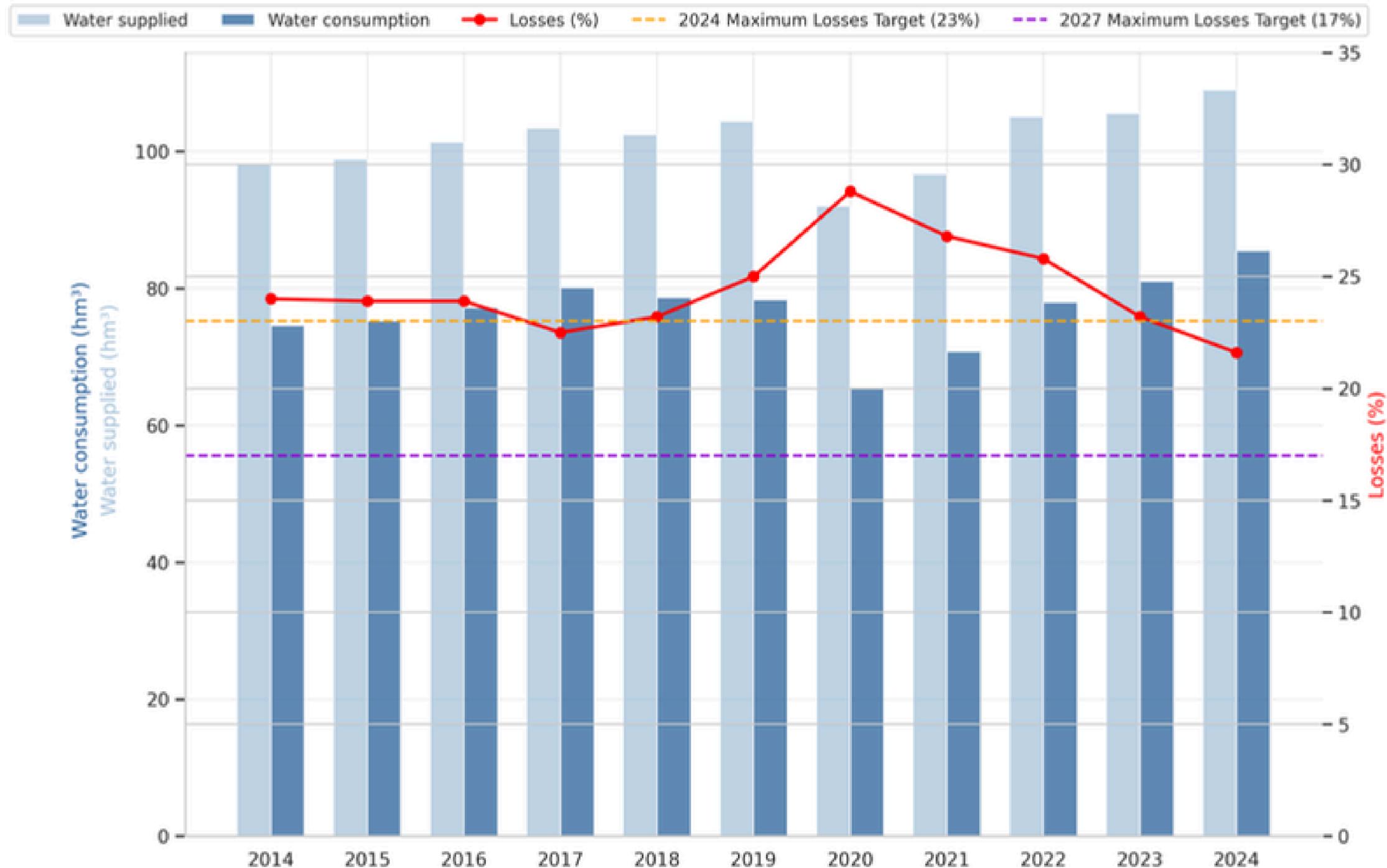
The charts show the composition of electricity supply in Mallorca between 2022 and 2024. Non-renewable energy remains the main source, but its share decreases from 83.1% in 2022 to 58.6% in 2024. Meanwhile, renewable energy grows from 7.3% to 10.9%, and the share imported through the link with the Iberian Peninsula increases significantly from 9.6% to 30.4%. Overall, the data reflect a gradual diversification of the island's energy mix.



Source: IBESTAT - Electricity production and demand

02 DIAGNOSIS: WATER MANAGEMENT

Evolution of urban water consumption and urban water leakage in Mallorca



Notes:

The Balearic Islands Hydrological Plan establishes a target to reduce water losses in urban supplies to 17% by 2027. The data up to 2024 show a steady decline in losses, already below the intermediate thresholds set in previous years. This downward trend reflects ongoing efforts by municipalities to modernize their water networks and implement more efficient management systems. These measures are expected to further improve performance in the coming years and ensure compliance with the 2027 target.

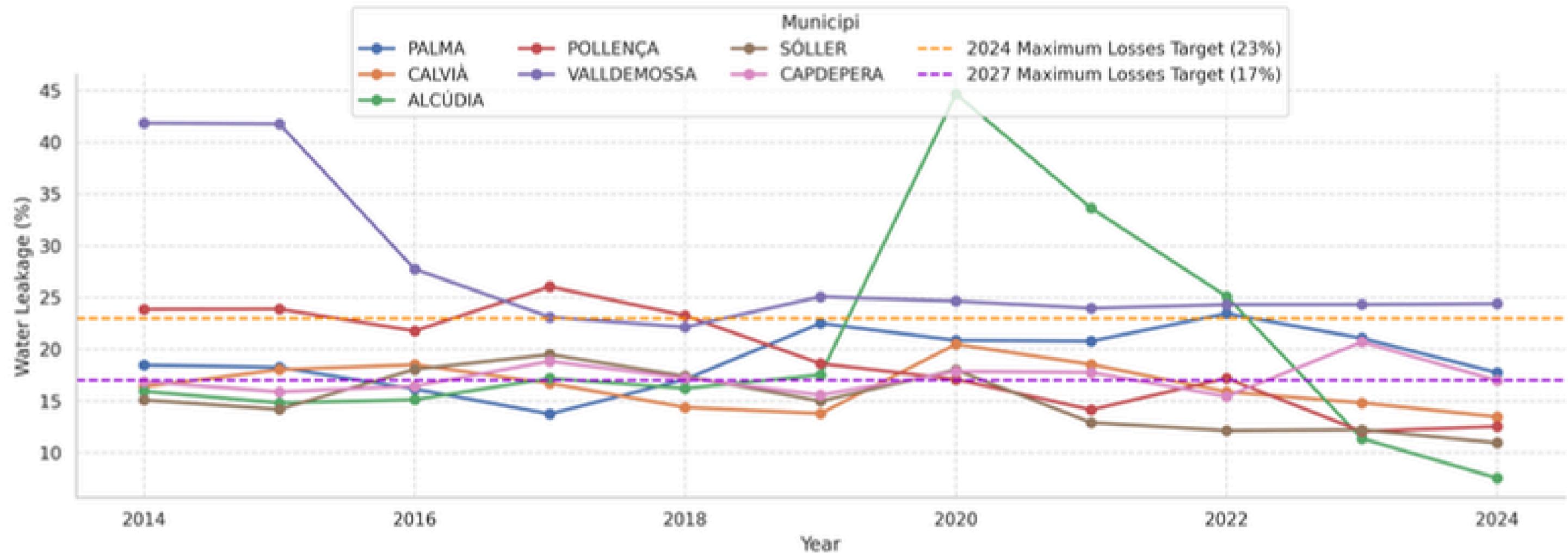
Source: Govern de les Illes Balears - Water portal

02 DIAGNOSIS: WATER MANAGEMENT

Evolution of urban water leakage in touristic municipalities

Notes:

Water losses in major tourist municipalities continue to improve in 2024. Most areas remain below the current target, and several already meet the 2027 goal. Palma is close to reaching it, and Alcúdia shows clear progress after previous fluctuations. Across the island, municipalities continue working on their Sustainable Water Management Plans to further enhance network efficiency.



Source: Govern de les Illes Balears - Water portal

02 DIAGNOSIS: WASTE WATER (SEWAGE) MANAGEMENT

Global Sustainable Tourism Council compliance indicators

- 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.

OK?

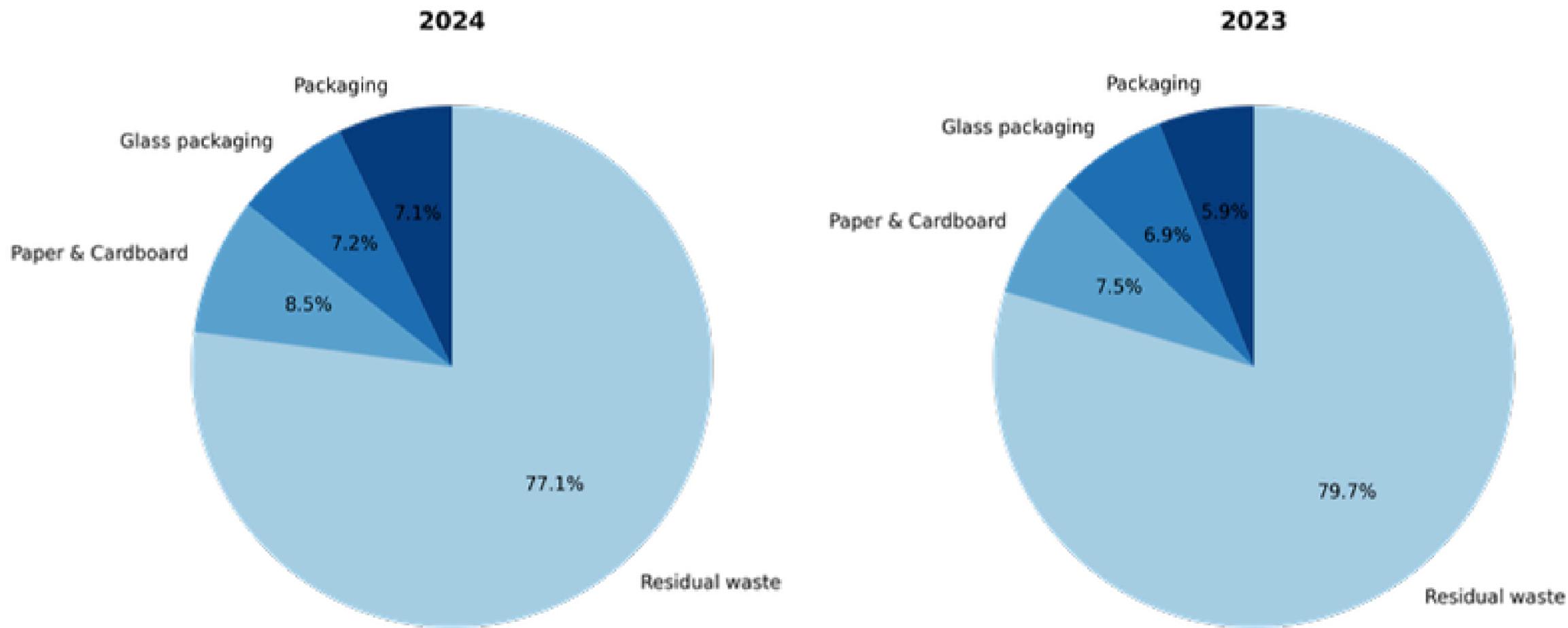


Source



02 DIAGNOSIS: SOLID WASTE MANAGEMENT

Solid waste distribution in Mallorca



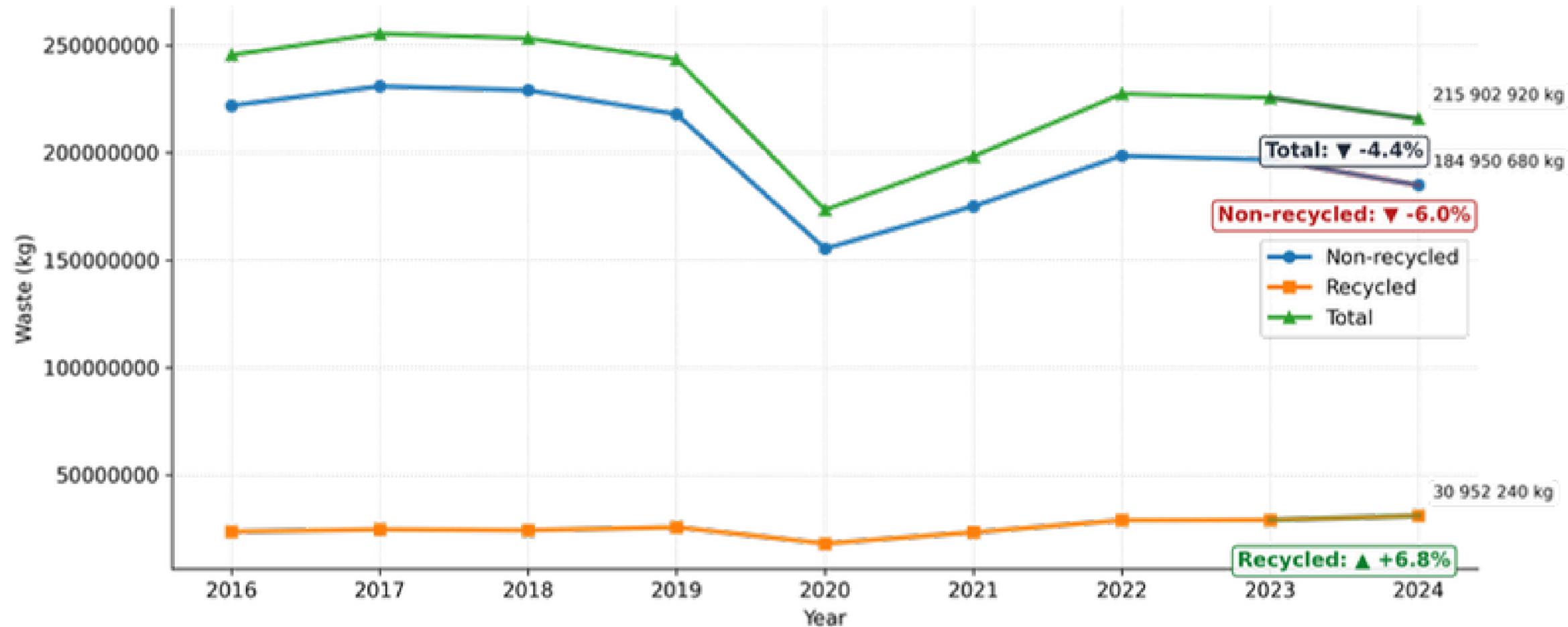
Notes:

The charts compare waste generation by category in Mallorca for 2023 and 2024. Non-recyclable waste remains the largest fraction, decreasing from 79.7% in 2023 to 77.1% in 2024. Recyclable fractions such as paper and cardboard, glass, and packaging show a slight increase in their share. Overall, the data indicate progress in selective waste collection and a gradual improvement in recycling performance across the island.

TIRME: Parque de Tecnologías Ambientales de Mallorca

02 DIAGNOSIS: SOLID WASTE MANAGEMENT

Evolution of Monthly solid waste produced in Mallorca in 2024



Notes:

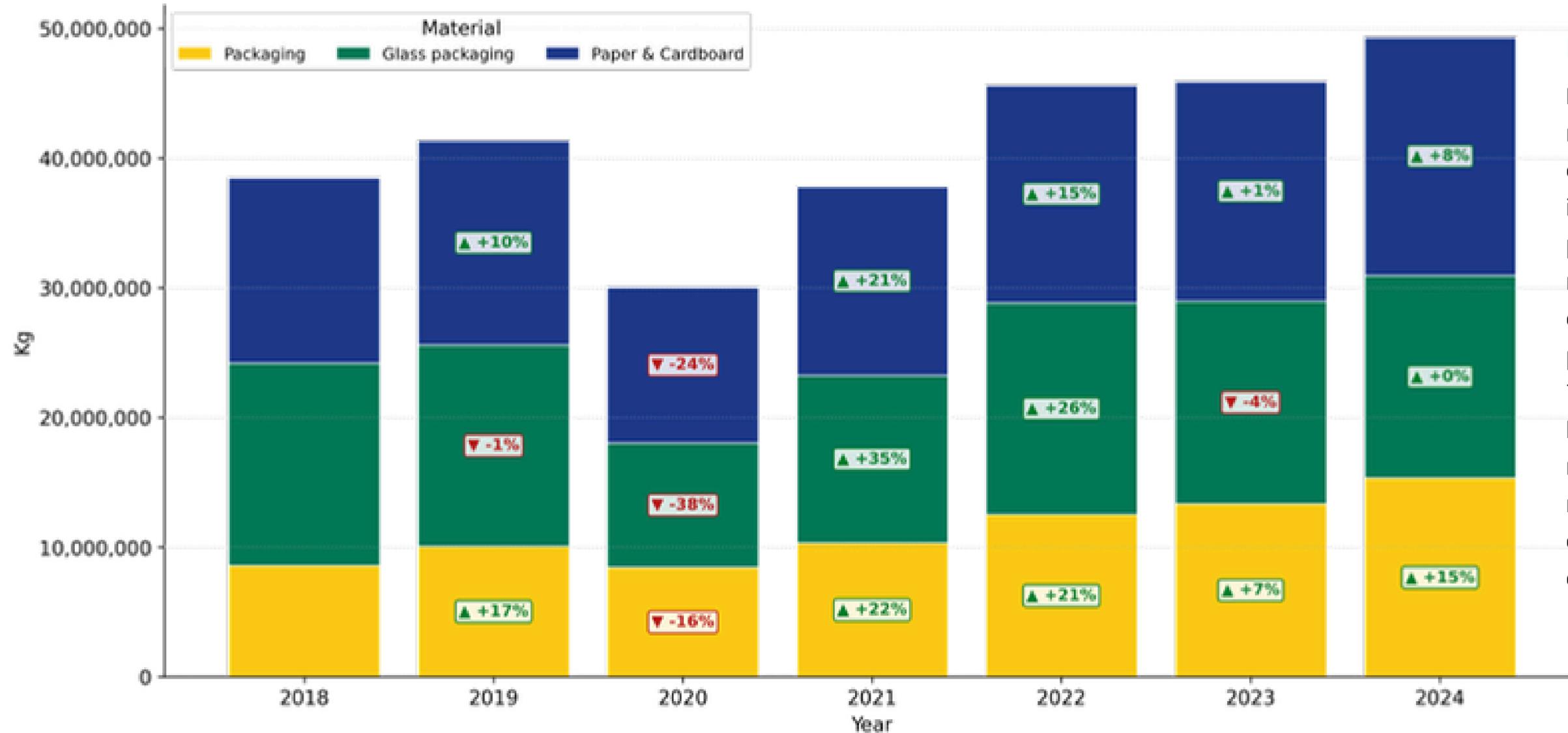
The chart shows the evolution of waste generation in Mallorca between 2018 and 2024. Total waste decreased by 4.4% compared to the previous year, mainly due to a 6% reduction in non-recycled waste. In contrast, recycled waste increased by 6.8%, reaching nearly 31,000 tonnes. These figures indicate moderate progress toward improving waste separation and reducing the volume of residual waste sent to treatment.

*Non-recycled or rejected includes both waste that is not recycled at source and waste that is not recyclable or could not be treated.

TIRME: Parque de Tecnologías Ambientales de Mallorca

02 DIAGNOSIS: SOLID WASTE MANAGEMENT

Evolution of recycled waste in Mallorca (2018-2024)



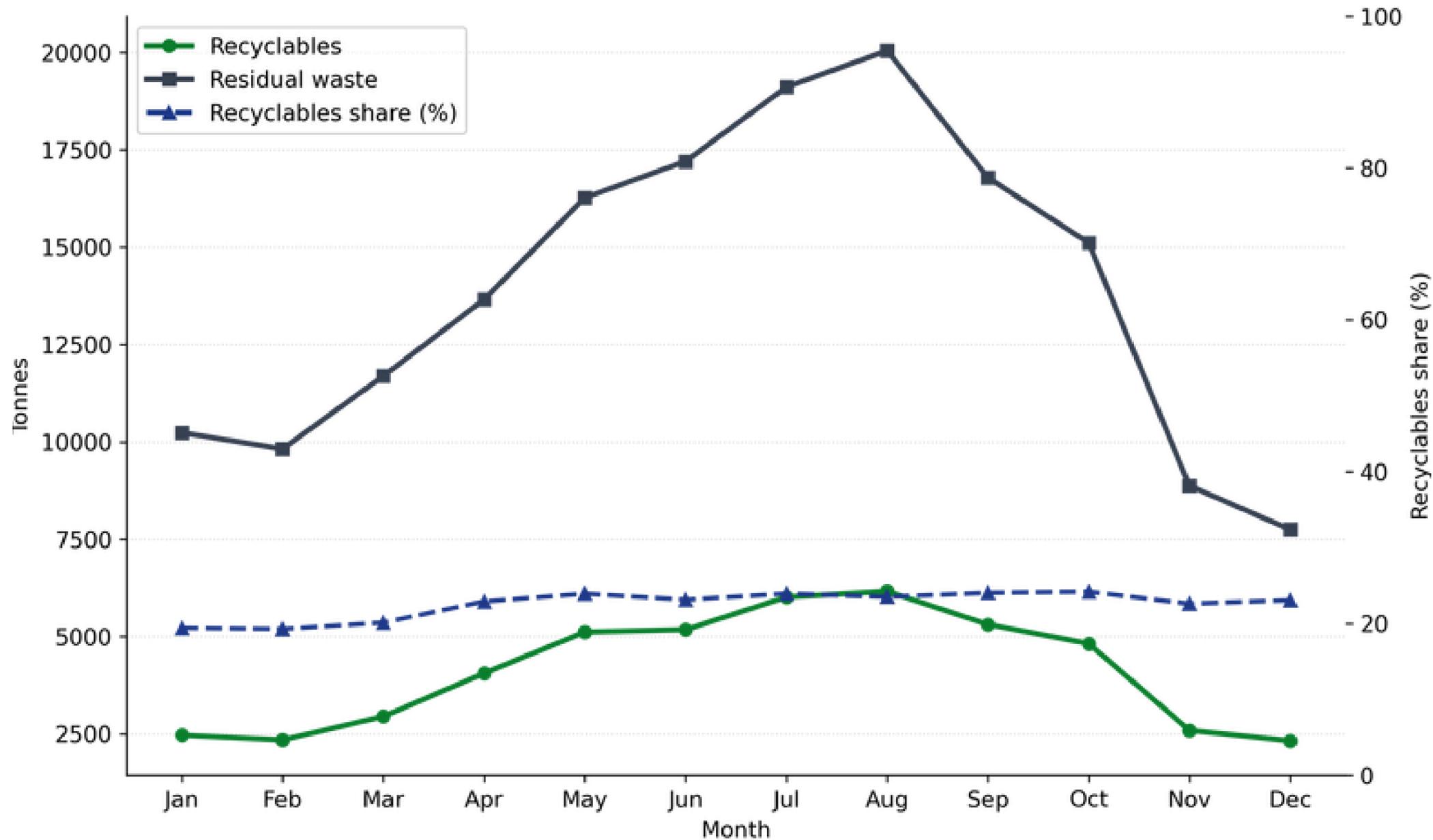
Notes:

In 2024, the quantities of recyclable materials collected in Mallorca increased compared to the previous year. Packaging rose by 15%, paper and cardboard by 8%, and glass packaging remained stable. These figures indicate a higher overall volume of recyclable waste collected, reflecting both changes in consumption patterns and collection dynamics.

TIRME: Parque de Tecnologías Ambientales de Mallorca

02 DIAGNOSIS: SOLID WASTE MANAGEMENT

Recycled waste in Mallorca in 2024



TIRME: Parque de Tecnologías Ambientales de Mallorca

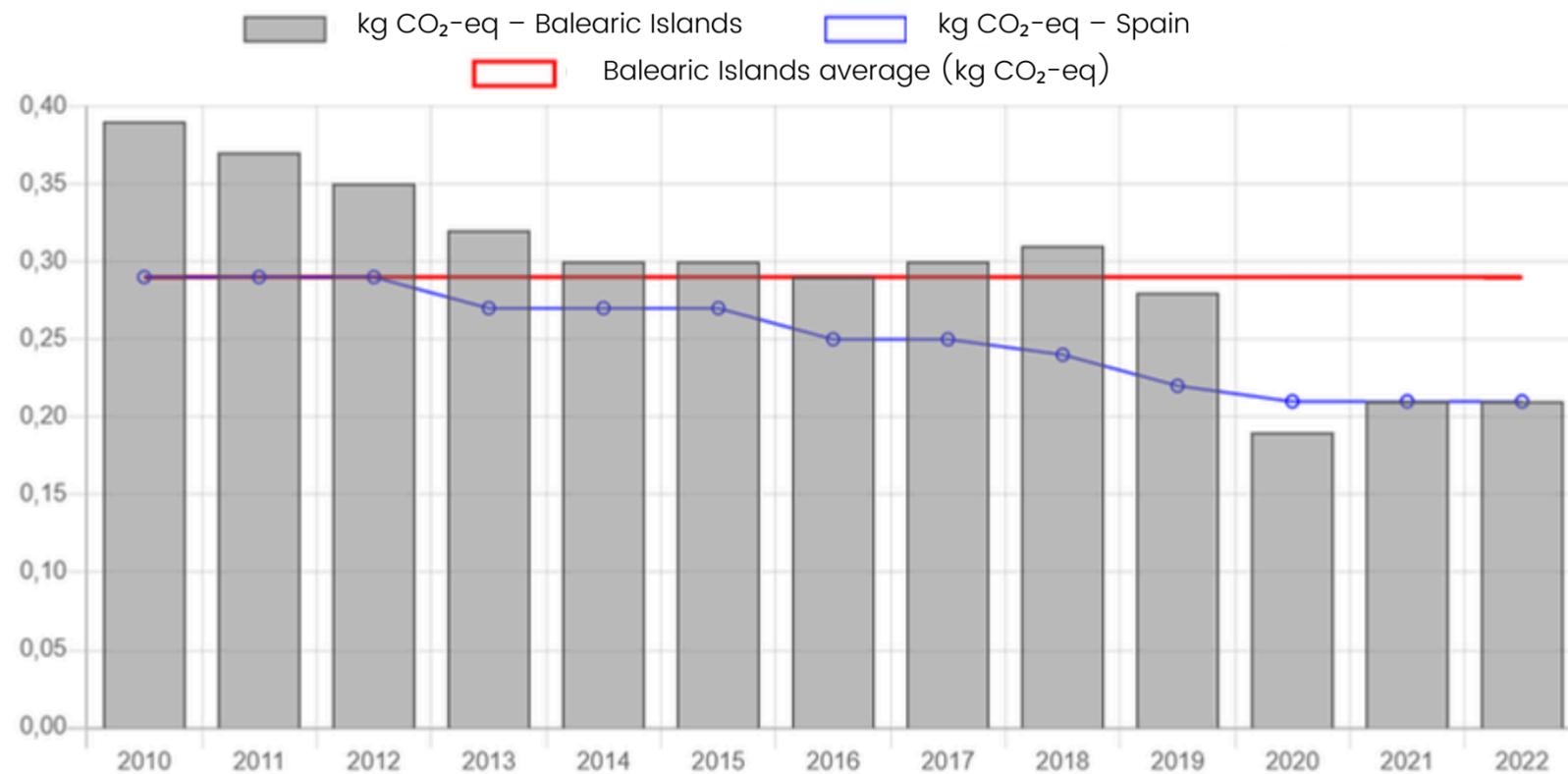
Notes:

Throughout 2024, the share of recyclables remained relatively stable, showing only minor monthly variations. The overall pattern reflects the strong influence of seasonality on waste generation in Mallorca. During the summer months, both recyclables and residual waste peak simultaneously, coinciding with the arrival of a larger population and increased tourism activity. These fluctuations do not indicate a change in recycling behavior but rather the direct effect of higher consumption and waste generation during the peak tourist season.

02 DIAGNOSIS: CLIMATE ACTION

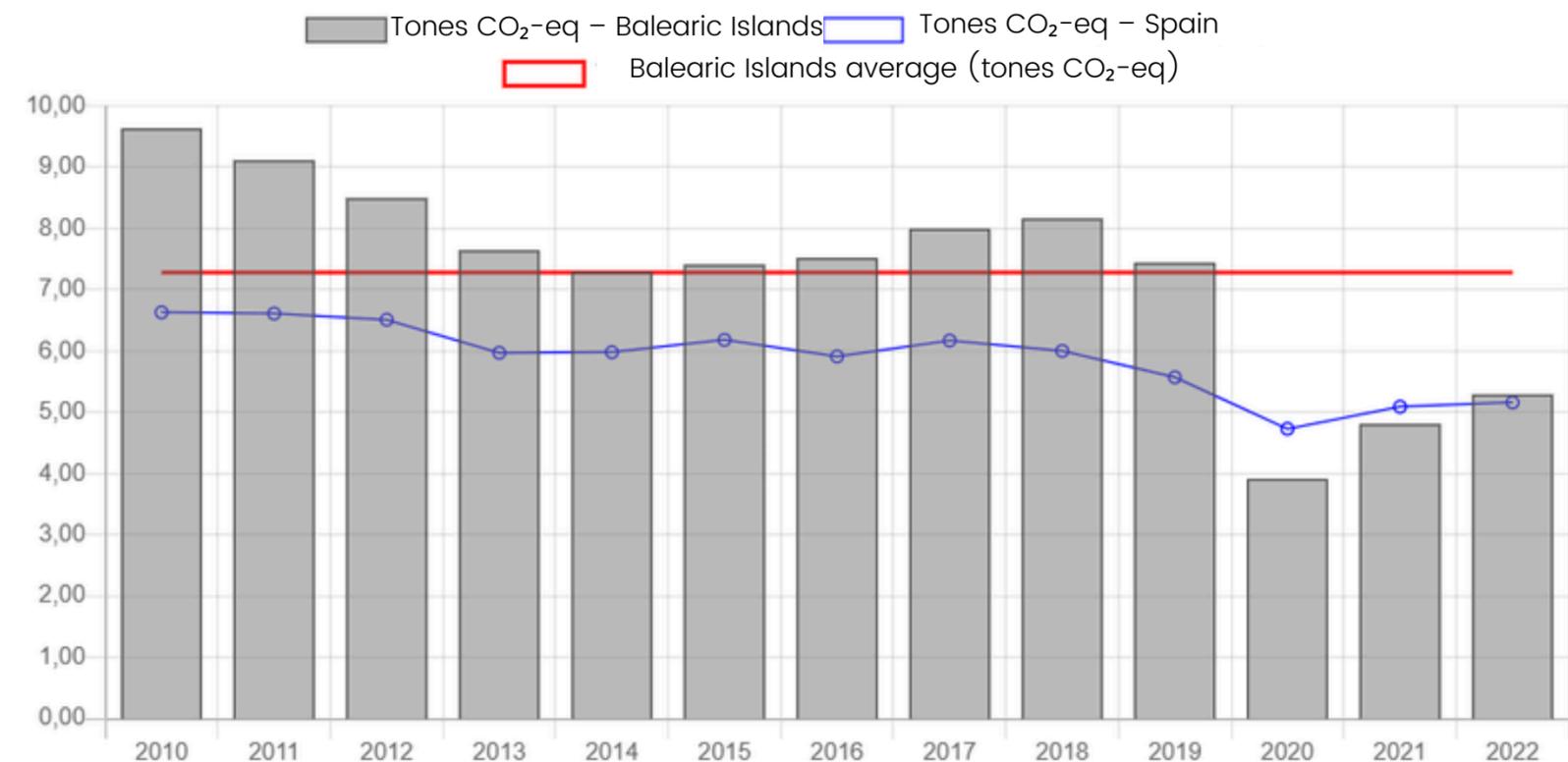
Total greenhouse gas emissions of resident units per unit of GDP

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



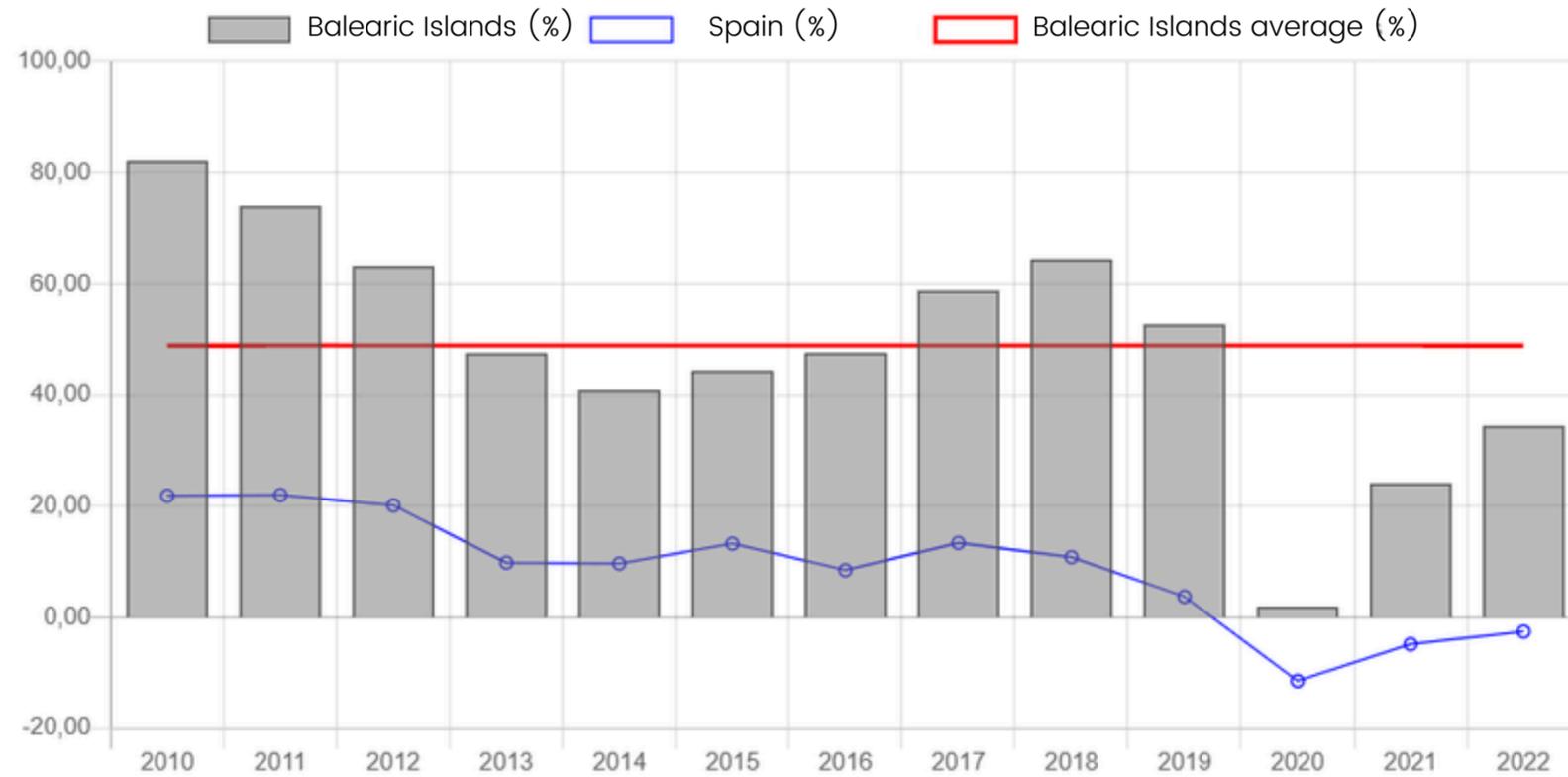
Notes: During the years 2020 and 2021 we can observe the effect of the pandemic on greenhouse gas emissions. We can see how emissions are reduced with respect to Spain, due to the fact that tourism has a greater weight in the Balearic economy and, consequently, a greater impact. We are waiting to analyse the data for the years 2023 and 2024. 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

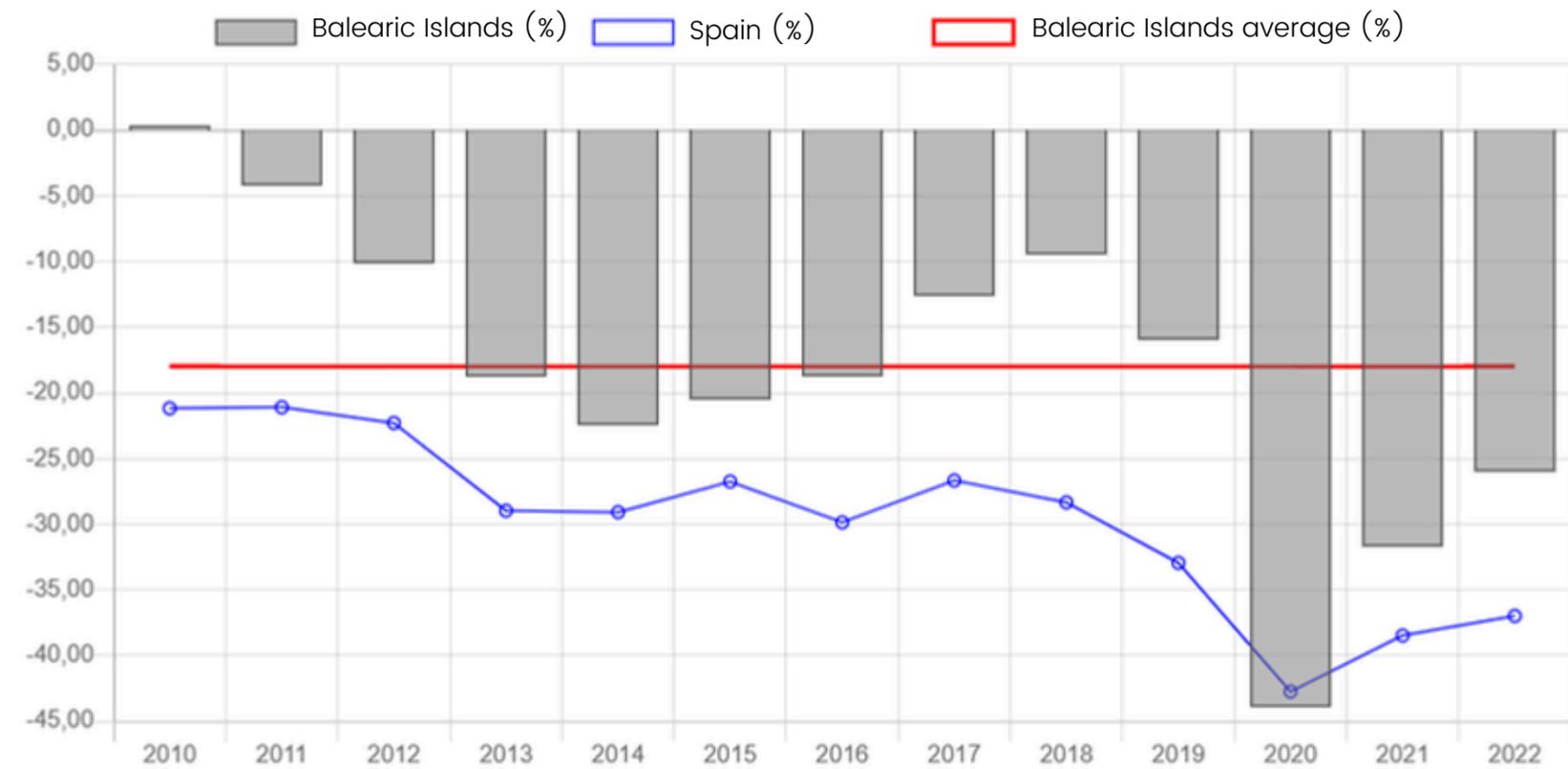
Greenhouse gas emissions compared to 1990

Source: IBESTAT - SDG indicators > Indicator 13.2.2



Greenhouse gas emissions compared to 2005

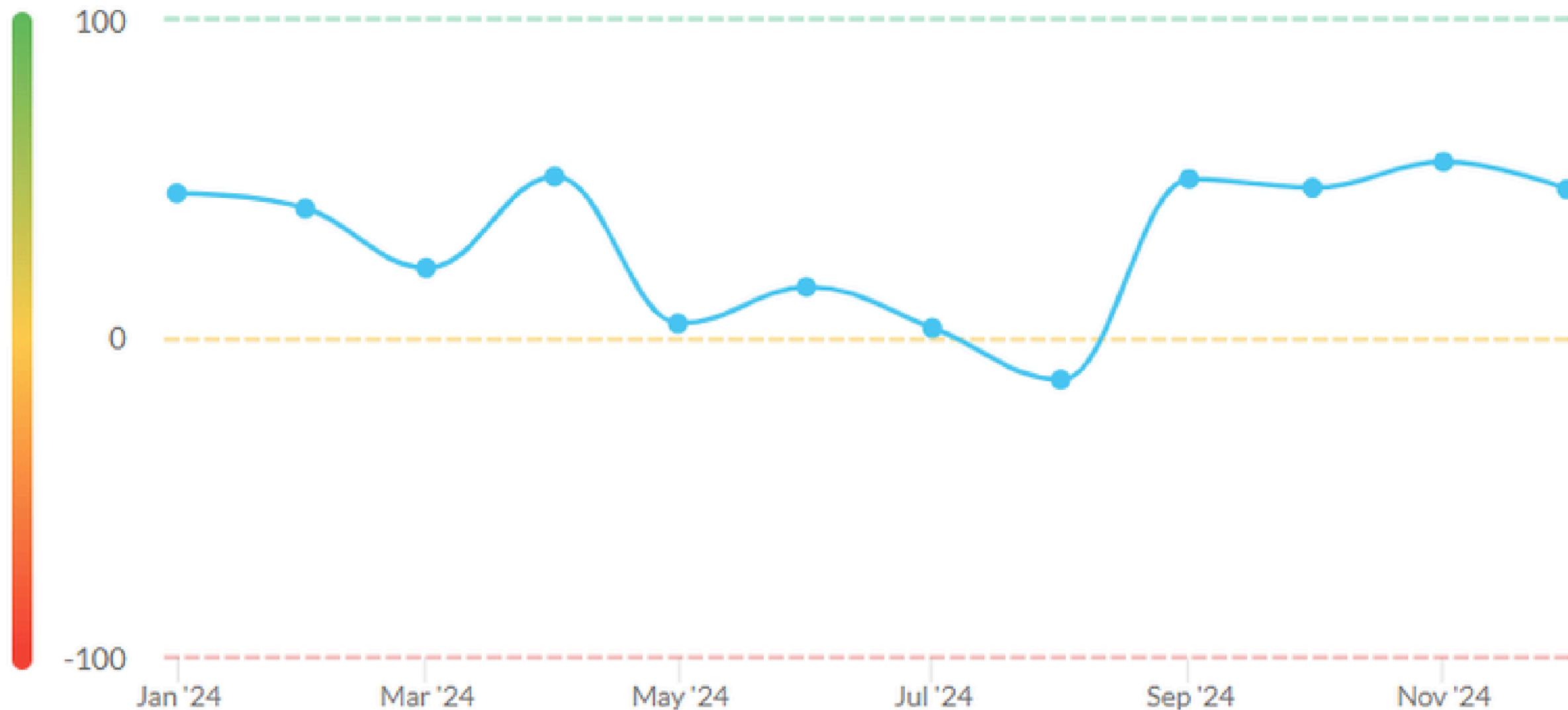
Source: IBESTAT - SDG indicators > Indicator 13.2.2



02 DIAGNOSIS: LOCAL SATISFACTION

Regarding resident satisfaction with tourism, we are analysing data from social networks and the Internet related to tourism activity in Mallorca.

Analysis of sentiment on Mallorca in 2024



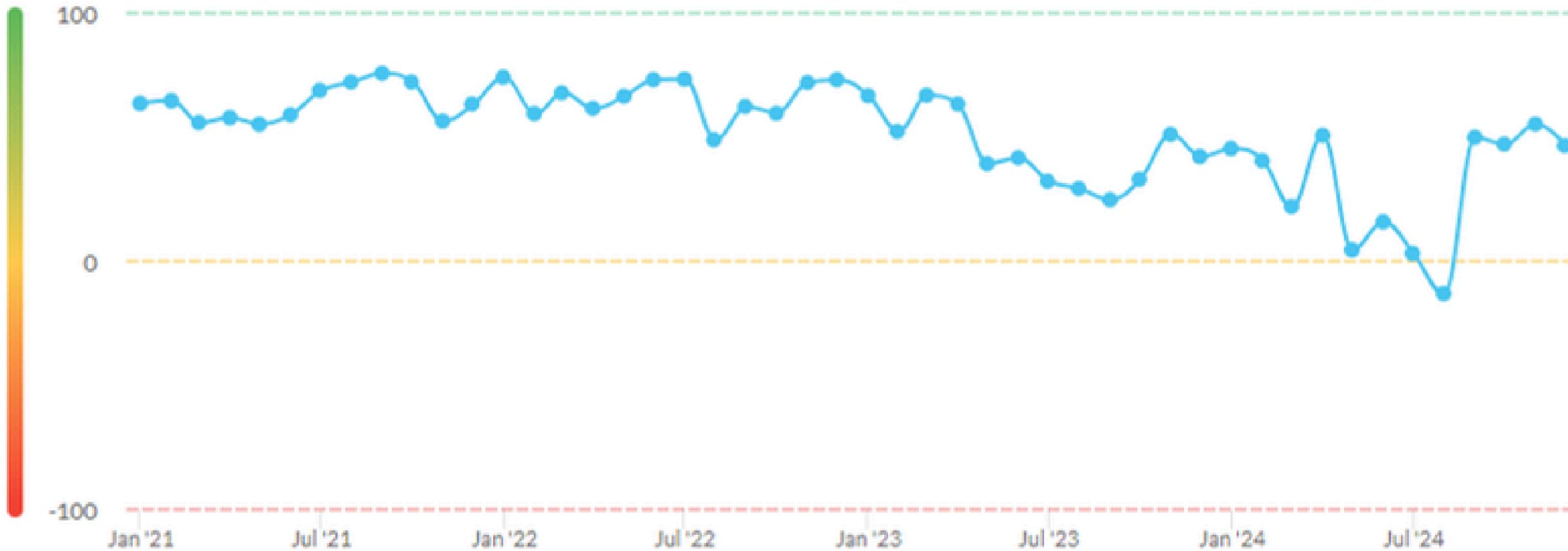
Notes:

In 2024, tourism sentiment shows moderate fluctuations but remains overall positive. The trend declines gradually from February to August, reaching its lowest point in midsummer, when public discussion often focuses on the challenges of peak season. From September onward, sentiment improves again, recovering to higher levels by the end of the year.

Source: Onclusive

02 DIAGNOSIS: LOCAL SATISFACTION

Analysis of sentiment on Mallorca in 2021-2024



Notes:

The net sentiment trend for tourism remains generally neutral throughout the period, with values consistently above zero between 2021 and mid-2023. From late 2023 to early 2024, a temporary decline is observed, reaching its lowest point around spring 2024, before recovering during the summer months. Overall, sentiment stabilizes again in the second half of 2024, suggesting a return to pre-decline levels of public perception regarding tourism.

Source: Onclusive

02 DIAGNOSIS: LOCAL SATISFACTION

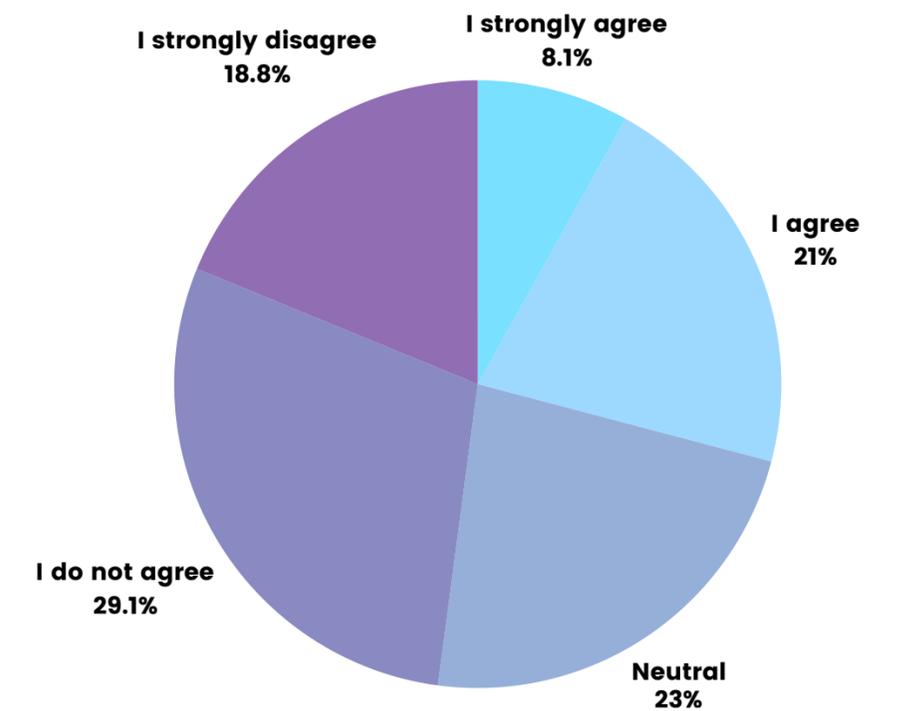
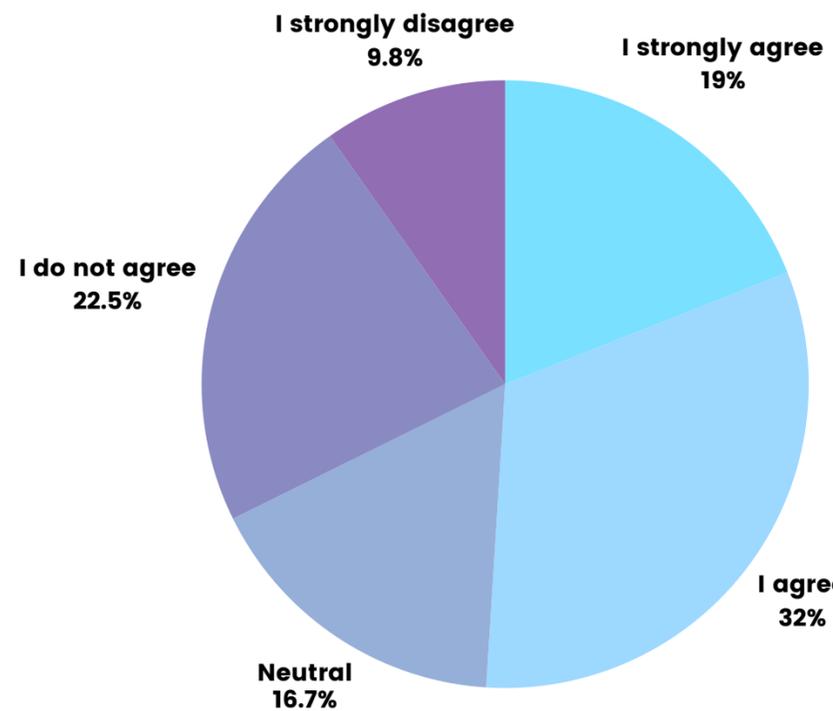
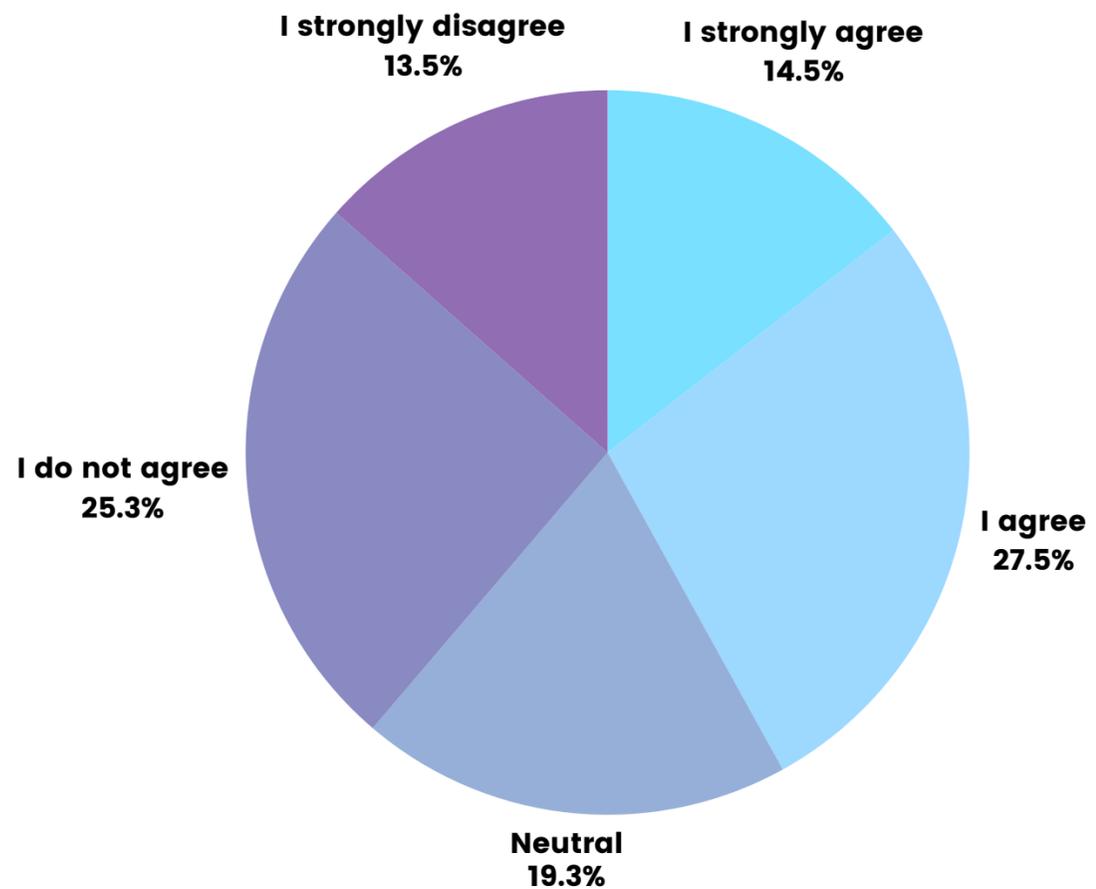
Main results of the survey of residents' opinion on tourism in the Balearic Islands 2024

Source: AETIB - Survey of residents' opinion on tourism

I am very satisfied with tourism

Related with tourism sector

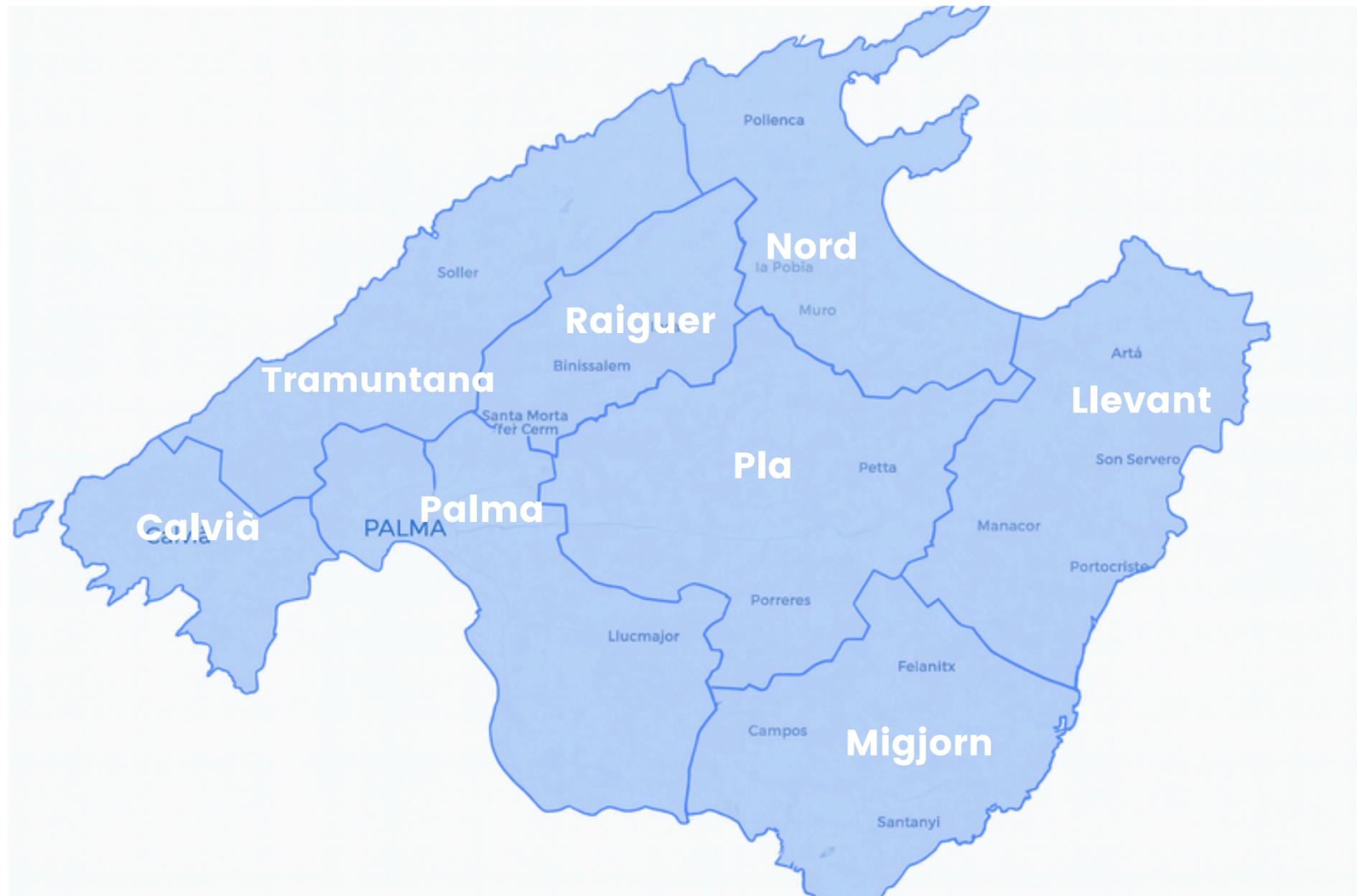
Not related



Notes: The results show a fairly balanced perception of tourism, with similar proportions of agreement and disagreement. However, the difference becomes clearer when considering people's connection to the sector: those involved in tourism tend to view it more positively, while those without such a link are mostly negative towards it.

02 DIAGNOSIS: GOVERNANCE

Sustainable tourism management is based on the administration's ability to make informed decisions that are adapted to the reality of the territory. Under this principle, a strategic territorial planning framework has been established that divides the island of Mallorca into eight distinct functional zones.



The Observatory, in collaboration with the University of the Balearic Islands (UIB), has designed a plan to produce a series of diagnostic reports that analyze in depth the environmental, social, and economic situation of each of these eight zones.

During 2024, reports have already been completed for two of the eight planned areas: Llevant and Tramuntana.

These reports are now available for public consultation on the Observatory's website. The Observatory is committed to continuing this line of work throughout 2025 until the diagnoses of the island's eight functional areas are complete.

This initiative not only strengthens governance through the transfer of academic knowledge, but also ensures that future decision-making is rigorously based on territorial data and the most up-to-date scientific knowledge.



FUTURE WORK

During 2025 and 2026, the Observatory will continue to deepen the analysis of tourist housing, consolidating the monitoring of this key aspect for the sustainable management of the island. The aim is to improve the availability and comparability of data to better understand its effects on the territory and local communities.

In parallel, new lines of work will be launched, such as the incorporation of mobility and cruise data, which will help to provide a more integrated view of visitor movements and pressures across Mallorca.

This new phase will also coincide with the start of major projects such as Mallorca PID, designed to promote digitalisation, innovation and collaboration between institutions. Together, these advances will strengthen the Observatory's capacity to generate reliable information and support evidence-based policies for a more balanced and resilient tourism model.

SUSTAINABLE TOURISM OBSERVATORY OF MALLORCA

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