



PRELIMINARY STUDY REPORT

ESTABLISHING THE MALLORCA SUSTAINABLE TOURISM OBSERVATORY



MALLORCA, CANDIDATA
OBSERVATORI MUNDIAL
DE TURISME SOSTENIBLE



Fundació Mallorca Turisme
Consell de Mallorca



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LIST OF ABBREVIATIONS

LA	Local Administration/Authorities
ACA	Airport Carbon Accreditation
AETIB	Balearic Islands Tourism Strategy Agency
AI	Artificial Intelligence
APB	Balearic Islands Port Authority
BI	Business Intelligence
BOIB	Official Journal of the Balearic Islands
CAEB	Balearic Islands' Business Associations Confederation
CEPYME	Spanish Confederation of Small and Medium-Sized Companies
DMO	Destination Management Organisation
DTI	Smart Tourism Destination (STD)
ETIS	European Tourism Indicators System
EU	European Union
FEHM	Mallorca Hotel Businesses
FMT	Mallorca Hotel Business Federation
FRONTUR	Statistics on Tourism Movement on the Borders and Tourism Expenditure Survey
GCI	Global Competitiveness Index
GSTC	Global Sustainable Tourism Council
IBESTAT	Balearic Islands' Statistics Institute
ICTs	Information and Communication Technologies
INE	National Institute of Statistics (NISs)
ITS	Sustainable Tourism Tax (STT)
KPI	Key Performance Indicator
MICE	Meetings, Incentives, Conventions and Exhibitions
SDG	Sustainable Development Goal
SOIB	Balearic Islands Employment Service
SPA	Special Preservation Area
SPABs	Special Protection Area for Birds
STO	Sustainable Tourism Observatory
STSs	Strategic Tourism Segments
TCI	Tourism Competitiveness Index
TGSS	Social Security Tax office
TO	Tour Operator
TSA	Tourism Satellite Account
TSMT	Tourism Sustainability Measuring Tool
UNWTO	World Tourism Organization



MALLORCA SUSTAINABLE TOURISM OBSERVATORY

INTRODUCTION

Why a Sustainable Tourism Observatory in Mallorca?

Mallorca is a mature tourist destination that welcomes millions of tourists every year and is considered a worldwide model to emulate. To protect and preserve the destination, we need to know how tourism affects the natural environment, economy, and residents. This can only be done with an observatory that collects and analyses all the data generated before, during, and after tourists visit the island.

The island of Mallorca has been a top tourism destination for more than seventy years, but this has also led to a progressive deterioration of its territory, sometimes affecting infrastructures, the environment, ecosystems, etc. Due to the immense number of tourists visiting the island every year during the high season, to become a top-rated sustainable tourism destination and improve operations, adapt and manage tourist experiences, we need to monitor data that will give us information on the status of the island's terrain, markets, residents and visitors.

Fundación Mallorca Turismo (FMT), part of Mallorca's Island Council (Consell de Mallorca) and an affiliate member of UNWTO since September 2020 is applying to become a UNWTO Sustainable Tourism Observatory to join the International Network of Sustainable Tourism Observatories (UNWTO INSTO network) and establish itself as a top sustainable tourism destination.

FMT is currently also carrying out other initiatives that will put Mallorca at the top of international tourism management organisations' lists as 'a must-go destination'. It is already a member of the Network of Smart Tourism Destinations (DTI), an affiliate member of the World Tourism Organisation, and it has been issued with the "UNWTO.QUEST Certification", accrediting the destination's excellence and quality in strategic leadership, execution, and governance capacities.

The Observatory's main tasks will essentially focus on:

- **Monitoring** the environmental, social and economic impact of tourism on the destination, based on real data.
- Generating **new sources of information and analyses** that will arise from cooperation and the mutual exchange of information and experiences.
- Generating **synergies and cooperative learning** to design policies and strategies based on the inalienable sustainable development criteria, technological advances, and care for the socio-cultural heritage.

Implicit in the management of the Observatory is also the creation of a clear profile of Mallorca as a tourist destination where three linchpins are kept in mind:

- Tourism flows
- The island's financial framework
- The island's structural framework

In short, with the Mallorca Observatory, for the first time, an efficient system will be in place to:

- Position the island among the world's top tourist destinations in terms of **quality, sustainable development, and collaborative work (local and international)**.
- **Make decisions** using a tool that collects and analyses data to help establish clear and precise dashboards that will be implemented at all levels of the island's tourism sector.

As clear examples of what it means for Mallorca, the following stand out: it will be the third tourism destination in Spain to have an Observatory (at the moment only Navarra and the Canary Islands have observatories), the ninth in the European Union and the thirty second in the world. Meaning, the island will have a privileged position in an, especially critical moment. Now more than ever, due to the international situation caused by COVID-19, strategic approaches, planning, data analysis and collaborative work are fundamental features for the destination to be boosted and to help overcome this global crisis as strongly as possible.

The Observatory is based on a straightforward concept: **awareness today, to design and build a future** with the following essential criteria:

- Tourism, as Mallorca's main economic driver.
- Natural resources are not infinite.
- The need to preserve and restore.
- The need to adapt to the changes and innovate in tourist systems.
- The common goal to minimise the impact of tourism on the habitat.

Likewise, for Mallorca, this will mean being a lot more visible at the international level and establishing tools to materialise the whole sector and industry's general commitment to move forward together.

It should also be noted that it will be a real boost to make people, companies, and the public sector aware of the importance of working together to become sustainable.

The Observatory will make it possible to coordinate strategies and policies to really demonstrate the core idea of how working together will make the destination a lot better and stronger.

It will also make it a lot easier to access systematic and timely tools, connecting different tourism destinations and promoting responsible tourism management. In this sense, we hope to strengthen cooperation with organisations that are already doing an outstanding job collecting, analysing, and interpreting data.

With the Mallorca Observatory creation, the island will systematically apply information management, evaluation, and surveillance techniques. By belonging to this network will be able to provide key resources for tourism managers and planners, as well as all stakeholders, to strengthen institutional capacity, policy-making and strategy development.

Given that decision-making based on evidence and contrasted data is vital for developing sustainable tourism, observatories are becoming a fundamental resource to improve sustainability in the tourism industry continuously. The Mallorca Observatory will provide the potential to stimulate and catalyse the development of innovation in the destination and play a fundamental role in monitoring and dealing with issues like job creation and sustainable production and consumption, public health and safety and security, human rights, quality education and inequalities.

It should be noted that the island's tourism industry and economic and social network have contributed a great to the Mallorca's Observatory's application and meetings were scheduled and held with several different relevant stakeholders. And workshops to raise awareness about the importance of sustainable tourism and having the necessary tools to measure it were also organised for children and youngsters.

Mission, Vision and Values of Mallorca's Observatory

MISSION

Generate information to guide public and private sector decisions, providing intelligence throughout the value chain to increase competitiveness and productivity, always implementing the linchpins of sustainability.

VISION

Generate strategic knowledge implementing innovative research techniques for a changing environment and tourism demand, achieving sustainability on the island of Mallorca.

VALUES

Inclusive, open, innovative, sustainable, outstanding and high-quality Tourist Destination committed to accessibility and society



1 OBJECTIVES OF THE OBSERVATORY

1.1 General Objectives of the Observatory



Sustainability

Lead the ecological transition and strengthen the consolidation of a sustainable and responsible tourism destination by better understanding the use of resources in the destination and systematically, suitably, and regularly monitor tourism's performance and impact.



Synergies and Partnerships

Create alliances and synergies with solid partnerships and shared governance, leading to further cooperation between different industries and the subsequent generation of trust.



Monitoring and Technologies

Establish a monitoring system to measure the role of tourism in sustainable development (including at economic, social, and environmental level) and improve data collection, cross-referencing, validation, analysis and interpretation by using new technologies (especially Big Data) and new business management systems to help develop advanced tourism business activities that respect the habitat and the natural environment.



Smart Destination Management

Implement Smart Destination Management by giving tourism managers, planners, policymakers, and other relevant stakeholders evidence, key tools, and information to strengthen institutional capacities and support policymaking and its implementation as well as sustainable tourism management plans and procedures.



Communication, Education, Raise Awareness

Raise awareness, enable learning, and promote strategic marketing and communication through research, feedback mechanisms, and the education and training of Mallorca's human capital.



Leadership and Innovation

Become a Smart Destination model to emulate worldwide and show how being a Smart Destination contributes to overcoming the new socio-economic and climate change challenges. This will be done by promoting excellence in the management and export of technology for tourism, knowledge about innovative models for tourism services, and products under the Mallorca brand. It will also contribute to the generation and speedy growth of advanced sustainable tourism services, well-being, and life quality.

1.2 Specific Objectives

1.2.1 Sustainability

- Include sustainability criteria in all decision-making.
- **Contribute to the implementation of the island of Mallorca's Agenda 2030.** Define the sustainability priorities that need to be included in the present and future planning of tourism on the island of Mallorca to contribute to the development of an ideal tourism framework, balances at social and territorial level following the seventeen Sustainable Development Goals set.
- **Implement the Agenda 2030 Tourism Technical Committee.** The development of a Technical Committee Specialised in Sustainability and managed by Fundació Mallorca Turisme itself, will enable continuous monitoring of the initiatives and priorities set in the Agenda 2030.
- **Create low-emission and greener areas** by planting 10,000 trees in the next four year in Palma, the capital of Mallorca.
- **Promote Circular Economy in the hospitality sector.** The destination's business sector continues to be one of the most active groups in terms of sustainability, so we believe it is essential to highlight and disseminate initiatives like the one carried out by Fundació Impulsa Balears, in collaboration with Grupo Iberostar and the World Tourism Organization (UNWTO) to encourage the hotel sector to follow the circular economy guidelines. To this end, work is being done to activate strategic levers that will boost competitiveness.
- **Implementation of tourism measures to reduce the island's carbon footprint.** Promote the use of ecological transport and recycled and/or recyclable materials when organising events, substitute paper brochures for online formats among many other measures.
- Design and Create Sustainable Tourist Routes (ecotourism, culinary tourism, agri-food, Local products and Slow Food, ethnographic atlas, etc.). Intimately related to the need of offering alternative services and experiences within the tourist destination. It is necessary to promote new sustainable products that also contribute to highlighting, recovering and protecting the destination's cultural and sociological essence.
- **Hinder and put a stop to any possible imbalances generated.** Emphasise the importance of maintaining and preserving the destination's quality of life, in search of mutual benefits for tourists and visitors as well as the residents themselves at all times.
- Introduce measures aimed at protecting the destination, its resources and the region as a whole due to its connection with mass tourism, in certain areas. As a mature destination, the island of Mallorca must introduce measures aimed at protecting the destination as a whole. Said measures must be supported by sustainability criteria that enable preserving cultural, social and environmental values offering alternatives and corrective measures against seasonal and mass tourism.

1.2.2 Synergies and Partnerships

- Channel the synergies of all other institutions and economic agents.
- Encourage the participation and involvement of destination agents.
- Promote and diversify tourism services and products by fostering Mallorca's value chain initiatives.
- **Encourage Participation in Sustainability International and National Networks** (Smart Tourist Destinations, Covenant of Mayors, etc.). Within the field of governance and management, measures aimed at securing as much involvement as possible also need to be established at different levels in the region. And all in pursuit of transversal and sustainable tourism growth in the destination.
- **Product of Mallorca Brand¹ and/or Taste Spain Product Club²**. Encouraging companies to join these projects will be a boost for tourism and local gastronomy because they will be supported by institutions like TURESPAÑA in the case of "Taste Spain" and Mallorca's Island Council itself through "Product of Mallorca". As well as preserving and acknowledging quality products, these initiatives enhance the destination's reputation and increase its appeal, positively affecting tourist experience.
- **Improve carbon footprint management and efficiency in the managing of water and plastics in the hotel sector.** As a practical investment to increase energy efficiency in the destination, it should be noted that Mallorca has one of the most active hospitality sectors in the world when it comes to this issue. In this sense, it is crucial to take advantage of the synergies generated in the industry: the Mallorca Hotel Business Federation (FEHM for its acronym in Spanish) together with AENOR, are already designing specific training programmes as well as developing strategic alliances aimed at making tourism activity in the destination more sustainable.
- **Improve the perception of Mallorca** by involving all tourism stakeholders, including the users themselves, people.

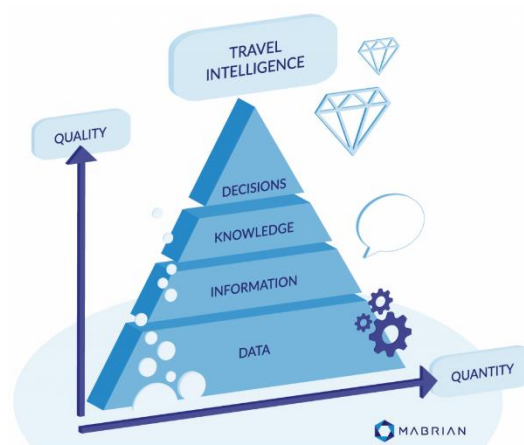
¹ Marca Producto de Mallorca

² Club de Product Saborea España

1.2.3 Monitoring and Technologies

A key objective for Mallorca as a tourism destination is for it to have a Travel and Tourism Intelligence and Environmental Sustainability System. This concept is essential and has several meanings if we take **Thinktur's** definition: "A *Travel and Tourism Intelligence System*" is a technological tool that enables the loading, processing and analysis of data from different information sources, both its own as well as external ones. This data is then transformed into relevant knowledge that will be used to make destination and company management easier", this gives us two key concepts: data and management.

For its part, **Mabrian** indicates that "Travel and Tourism Intelligence refers to integrating the analysis of global and current data into the tourism industry's decision-making process. In other words, it is the ability to reduce uncertainty by using information obtained from a variety of different data sources in real-time" and presents a very interesting illustration³.



Therefore, the Mallorca STO proposes to implement Mallorca's Travel and Tourism and Sustainability System by using Big Data, Machine Learning and Business Intelligence to identify, capture, integrate, process and analyse the different data sources provided by the stakeholders and other organisations that work with the Observatory to generate and produce interactive dashboards and reports that will be used as resources to support Mallorca's tourism industry's stakeholders in their decision-making.

The Mallorca STO will look for, choose and when deemed necessary, purchase, the required data available on tourism and travel indicators and tourist behaviour, data related to how the people of Mallorca feel about tourism, the economic impact of tourism, the effect of different groups of environmental sustainability indicators, etc. For this data search to be efficient, contact with the Balearic Statistical System (SESTIB for its acronym in Spanish) through a key stakeholder like IBESTAT is essential. The Island Council of Mallorca, and therefore FMT and the Mallorca STO as part of this organisation, is fully integrated within SESTIB and this guarantees accessibility to up-to-date official indicators. Rules, procedures and a perfectly defined bureaucratic system exist to facilitate access to administrative information, ensure the protection of statistical confidentiality, data, technical and quality standards, etc. In short, The Mallorca Sustainable Tourism Observatory will always and in first instance, analyse data from official data sources if they exist. If they do not, it will try to channel the search for new data to build-up all the different indicators.

From this data, the Mallorca STO will:

- download and analyse the information.
- design and calculate the tourism indicators.

³ <https://mabrian.com/blog/travel-intelligence/>

- create and set up user interfaces, reports and interactive dashboards that will be integrated into a web platform.
- build an Open Data to carry out descriptive analyses and assemble models to diagnose, predict and prescribe statistics. A specialised department will also be created to carry out research work. It will be made up of staff from the Mallorca STO and other external research organisations.

In short, the goal of implementing a Sustainable Tourism and Travel Intelligence System will be structured around the following issues:

- Setting up an ongoing knowledge-based system using New Technologies will help the destination adapt to its market needs and requirements.
- Identifying and analysing all of the data available from official organisations and others that support the Observatory. Identifying what interesting/necessary data is missing and design procedures to gain access to it as quickly as possible. Detecting errors in the data and ensuring the quality of the data.
- Defining key indicators (KPIs).
- Defining a Big Data technological architecture for the collection, integration, and processing of data.
- Designing Artificial Intelligence / Machine Learning and Advanced Analytics models for the use of this data.
- Implementing active listening systems.
- Designing the Observatory's deliverables in Open Data form and with ad hoc and regular reports.

1.2.4 Smart Management of the Tourist Destination

- **Advocate for Smart Destination Management.** The new changes in tourist profiles call for new procedures, tools, and management and marketing resources that will help the destination respond to the market's new needs and requirements, as well as the current situation relating to tourism.
- Increase the destination's efficiency and the use of infrastructures and services rendered by boosting the use of new technologies.
- **Create dashboards** for information and management, making it possible to act in beforehand, support decision-making, and analyse results and outcomes.
- **Promote existing services and products with the island of Mallorca's intrinsic and potential values.** The island of Mallorca has enough resources to enhance and add more value to its current services and products which is further enhanced, taking into account new forms of tourism, segments, multisegment, etc. that may arise. In this sense, it is necessary to promote those potential and emerging segments that enable the destination's growth and projection towards new special interest markets.
- As concrete examples of smart destination management, section 5.1.9 includes some of the activities carried out by city/town halls on the island.

1.2.5 Communication, education, and raising awareness

- **Launch promotional initiatives and products focused on decongesting the busiest tourist attractions.** To improve visitor management while at the tourist destination, different promotional activities will be carried out to boost places that are not as popular but that will enhance the visitor experience, as well as help, attract more people to the destination in the low season.
- **Develop a coordinated marketing and communication plan.** Simplify Communication initiatives. In terms of sustainability within the destination's marketing and promotional activities, we will prioritise the most effective initiatives and gradually cut down those less effective and increase the destination's presence and positioning online.
- **Implement awareness-raising campaigns and promote efficiency in tourist areas.** Creating a balanced social environment is closely related to the management of tourist areas themselves, especially when talking about bustling tourist areas. Raising awareness and making the local population aware will be a real boost for the management of tourist flows and their impact, both negative (pollution, security, overwhelmed services, etc.) and positive (increase in sales, safeguarding of spaces and activities, etc.).
- **Implement training cycles and care for people with disabilities.** The development of specific sustainable tourism training cycles, carried out together with universities, will be a general trend within the Strategic Plan itself. Issues like universal accessibility will be one of these cycles' main focuses. The idea is to make the destination, its services, facilities, and infrastructure more accessible for everyone.
- Consolidate the destination's professionalisation.
- Focus the destination's marketing initiatives on the world of travel and tourism digital marketing.
- The possibility of developing regulated postgraduate level courses for the training and education of intermediate and senior staff from the tourism sector together with the University of the Balearic Islands will be considered.

1.2.6 Leadership and Innovation

- Enhance Mallorca's reputation as a prestigious destination by fostering quality.
- Protect the destination and its territorial values.
- **Strengthen the destination's reputation and boost the Mallorca brand.** We need to reposition the island with a new and renovated image that will help consolidate the high-standard and professionalisation of all the stakeholders, directly and indirectly, involved in tourism.
- Foster the idea of having Ambassadors / Prescribers to represent the destination's value chain.
- **The UNWTO.QUEST certificate.** Being awarded the UNWTO.QUEST certificate was a clear goal for a destination like Mallorca, always looking to be acknowledged as a major tourist destination and a destination dedicated to sustainable tourism. To gain this award, we worked on setting up a system developed by the World Tourism Organization (UNWTO) itself and focused on the constant improvement of the quality and excellence of tourism development planning and governance.
- **Implement and lead a forum to exchange experiences.** Exchange and make successful initiatives set up in flagship destinations public knowledge.
- **Encourage tourist companies to promote environmentally respectful initiatives.** Motivate their commitment to develop and implement sustainable practices with prizes. This will be worked on by the foundation, and subsequently, a call will be designed according to the different categories and specific selection criteria.
- **Define a plan to support local tourism entrepreneurs.** Along the same line as above, a specific programme will be designed for local tourism entrepreneurs who promote sustainable tourism best practices. Agreements and strategic incentives will be developed to this end.
- **Promote a forum for socially responsible tourism companies.** To strengthen businesses' commitment to sustainability and social responsibility, Meeting Forums that will help raise the sector's awareness on the short and long-term advantages of implementing these initiatives within their process systems need to be set up.
- Promote strategies aimed at creating experiences in the tourist destination.
- Consolidate and reinforce issuing markets, both traditional and potential ones.

1.3 Alignment with the Sustainable Development Goals

The World Tourism Organization readjusted the Sustainable Development Goals to the present needs of tourism, fully demonstrating the intrinsic link between this social and economic activity and its contribution to society's sustainable development.



Although all SDGs are important for the Mallorca Observatory, three are particularly so because they specifically mention tourism. And it is for this reason that these are being taken into consideration more than the others:

- **Decent work and economic growth:** tourism is an economic activity closely linked to job creation and social and economic development.
- **Responsible consumption and production:** sustainability can not just be limited to policies and public management, it needs to be a part of society's behavioural pattern shared by all.
- **Life below water:** safeguarding our seabed's, on our island especially, is a fundamental aspect.

Likewise, two other SDGs equally related to tourism activity are also prioritised:

- **Gender equality:** development cannot exist if it is not under the inalienable criteria of gender, social... equality.
- **Sustainable cities and communities:** for sustainable tourism activity to exist, our towns and cities need to join the sector's efforts.

To measure sustainability following what the UNWTO establishes through the SDGs, we will use the following parameters.

- | | |
|----------------------------------------|---------------------------------------------------|
| ▪ Solid waste management | ▪ Employment |
| ▪ Mobility | ▪ Energy management |
| ▪ Water management, business structure | ▪ Climate change and tourism destination capacity |
| ▪ Wastewater management | ▪ Inclusivity and universal accessibility |
| ▪ Safety and security | ▪ Local satisfaction |
| ▪ Economic benefits of the destination | ▪ Governance |
| ▪ Tourism seasonality | |

To do this, we will analyse each parameter's current situation to propose short, medium and long-term improvement measures. We intend to draft an annual report, including all of the data obtained and shared with the island's entire social and business network to move forward together towards a continuous improvement in sustainability.



2 MAIN ISSUES AND INDICATORS ALIGNED WITH THE OBJECTIVES

For many years now, Mallorca as a tourist destination and region has been working on different issues related to sustainability. It is essential to point out that this work is being carried out at different levels and by different social network stakeholders. It is important to highlight, but without going into much detail because they are included in other chapters of this document, some aspects developed by the project's stakeholders, like:

- **Normative and regulation aspects.** The Government of the Balearic Islands enacted Law 2/2016 of March 30th regarding a tax on tourist stays in the Balearic Islands and measures to promote sustainable tourism. The income collected from this tax will be invested in developing regeneration and environmental recovery projects on the different islands among other initiatives. It is also important to point out that Law 10/2019 of February 22nd regarding climate change and energy transition defines the measures to combat climate change and sets the way to make an effective transition towards clean energy in the Balearic Islands.
- **Projects developed by the Government of the Balearic Islands,** like grants for the deployment and maintenance of semi-fast and fast recharging stations that are financed with funds from the Balearic Islands' tourism stay and sustainable tourism promotion measures' tax (ITS for its acronym in Spanish)
- **Normative aspects and projects developed by the Mallorca Island Council and all other Local Administrations (LAs).** Some to stand out are Palma's *30Km/h City* project, fostering different and safer mobility, and Palma 365 Foundation's initiatives that relate to the identification of the tourism inventory, the definition of objectives to improve the efficiency of resources that make Mallorca more sustainable, the identification of sustainability problems, the establishment of a quantitative and qualitative information collection system and the development of a municipal indicator system.
- Initiatives developed by the **Balearic Islands' Port Authority**, APB, in Palma and Alcudia's ports to reduce their carbon footprints, improve water quality, provide electricity to cruise ships docked at the ports, recover *Posidonia oceanica*, etc.

- Initiatives developed by **Aena** in the frame of their ambitious Climate Action Plan aimed at minimising impacts on the environment, highlighting, among others, the following achievements:
 - “Net-zero emissions” by 2040, ten years before the date defined in the United Nations’ SDGs.
 - Level 3+ “Carbon Neutrality” by 2026, an Accreditation granted by ACI Europe in the frame of the “Airport Carbon Accreditation” programme.
 - 100% Self-sufficient electric energy through the use of photovoltaic energy.
- Joint initiatives developed by **Cooperativas Agroalimentarias (Agri-food Cooperatives) and the Hotel Chain Association** to promote circular economy by selling quality agricultural products with certificates of origin to hotel restaurants.
- A joint initiative carried out by **TIRME** and different hotel chains where compost is made from the organic waste collected from hotels and then used to fertilise the farming plots of the members of Cooperativas Agroalimentarias.

In short, all of these initiatives developed by Mallorca’s STO’s stakeholders and by other relevant stakeholders from Mallorca’s social network are generating and monitoring vast amounts of data that will be integrated within the STO’s technological organisation to be processed, transformed, governed and used. The STO’s stakeholders’ model is the following:



Figure 1 – Organisation of the stakeholders within the Mallorca STO

Fundación Mallorca Turismo is Mallorca’s DMO and part of the Mallorca Island Council, body in charge of tourism in Mallorca. The Sustainable Tourism Observatory will be a department within FMT, and its top-level stakeholders will be members of this foundation’s board and will also participate in the STO’s governance. Second level stakeholders will be all other organisations and institutions that have supported the launch of the STO and that have also signed cooperation agreements with FMT in matters concerning the data-sharing model and how the archives and deliverables developed by the STO will be accessed (including the Open Data platform that the STO will create giving citizens and organisation free access when duly accredited). Finally, the STO will have two other external levels of cooperation. The first will include all local organisations, associations or individuals wanting to provide data, findings and/or knowledge and sustainable tourism best

practices from the island of Mallorca. And the last circle will involve all those from outside of Mallorca, from anywhere in Spain, or even the rest of the world wishing to collaborate with the Mallorca STO.

Each stakeholder will provide their final deliverables as raw data/microdata using different data sending models/information sharing.



Figure 2 – Diagram of the Sources

In Mallorca, this Tourism and Sustainability Intelligence System must allow us to measure, evaluate and propose improvement initiatives for sustainability in the destination, following UNWTO's SDGs criteria. And to do so, we will use the following groups of indicators:

- Management of solid waste
- Water management, business structure
- Wastewater management
- Economic benefits of the destination
- Tourism seasonality
- Employment
- Energy management
- Climate change and tourism destination capacity
- Inclusivity and universal accessibility
- Local satisfaction
- Governance

UNWTO states that monitoring these groups of indicators is mandatory for all Sustainable Tourism Observatories. Our application for the Mallorca STO also suggests another set of indicator groups that include specific and highly relevant issues for the characterisation of Mallorca as a sustainable tourism destination such as:

- Innovation
- Production and sustainable consumption
- Biodiversity and the safeguarding of nature
- Cultural heritage and traditions
- Mobility
- Use and regional planning, tourism development supervision
- Visitor satisfaction and behaviour
- Safety and security and health
- Sports Tourism

We will analyse the current status of each of these issues to see which is the starting point and propose short, medium and long-term improvement measures. These improvement or renovation activities will influence the chosen indicators to make a clear and objective follow-up of their impact. It will also be possible to make corrections if it is deemed the impact is not as expected.

The Mallorca STO will be organised around three main tasks (explained in more detail in chapter 3.1.1):

- Continual analysis of the territory and the definition of key indicators. These key indicators will be used to measure the impact of initiatives that will be carried out by Mallorca's stakeholders (Island Council, Town Councils, companies, associations, etc.) on different parts of the island and that may affect the destination's sustainability.
- The revitalisation of all the stakeholders (the STOBs stakeholders as well as other organisations and/or individuals involved in matters concerning sustainability in Mallorca) to improve and maintain the dynamics set up with the launch of the Mallorca STO, coordinating and increasing the number of stakeholders, accessing and adapting new data, favouring governance, etc.
- Spread information about Mallorca STO's initiatives and findings to all of Mallorca's residents, visitors and other international and national bodies interested in the development of Mallorca as a sustainable tourism destination together with the technical team working on Mallorca STO's technological platform.

This team and technology platform will be the keys to building the Sustainable and Tourism Intelligence model mentioned in section 1.4, using Machine Learning, BI and Big Data technologies and services, as well as other advanced analytics solutions that may be required.

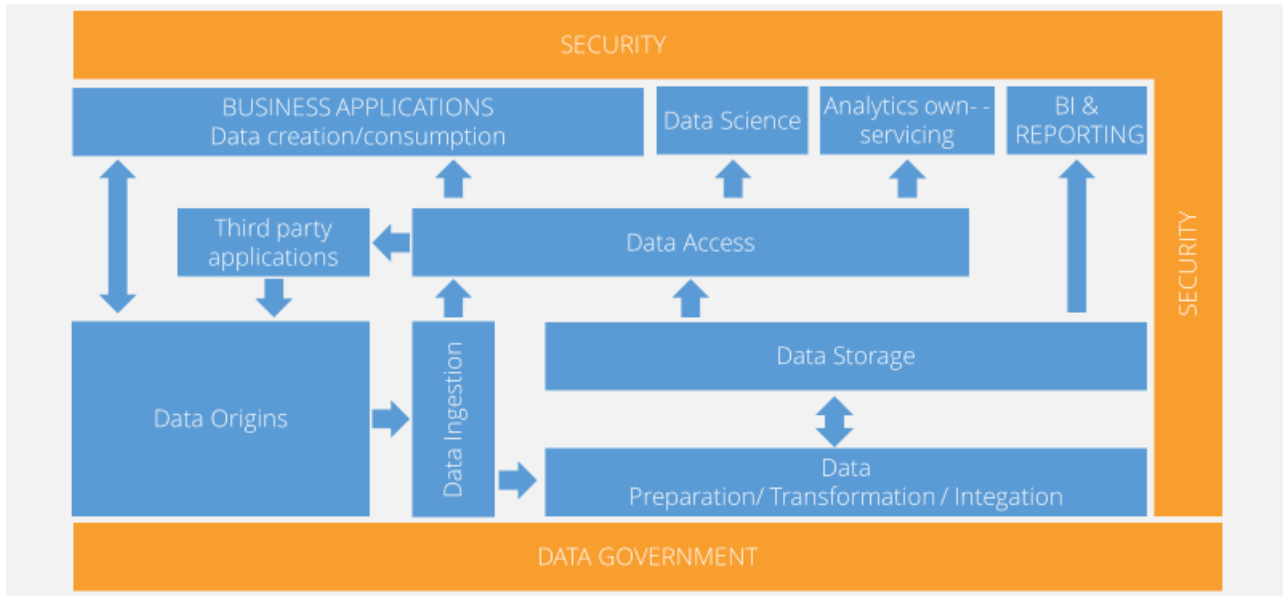


Figure 3 – Conceptual Model of the Mallorca STO's Data Platform

Based on this technology platform, the Mallorca STO will develop advanced business analytics that can be divided into the following specific areas:

- **Descriptive Analytics.** We will use data and different techniques and procedures to understand and analyse how tourist business and/or the advances in sustainability projects evolve. Business questions like 'what happened?', 'how are we doing with respect to the strategy or a specific period of time set?' are answered. The STO's deliverables for this analysis area will be dashboards, routine reports, ad-hoc reports and in-depth drill-down analysis.
- **Predictive Analytics.** We will use data accumulated over time and complex mathematical models to describe possible business developments (or study parameters) and predict expected behaviours in a given period of time. The techniques that will be used are:
 - Data mining: analysing data correlations
 - Recognition of patterns and warning alarms which will tell us when adjustment or corrective measures need to be taken in the case of new developments.
 - Speculative simulations (Monte-Carlo)
 - Predictive analysis to understand what will happen if the current trend continues or what will happen if certain actions are taken.
- **Prescriptive Analytics:** this is an area of Business Analytics dedicated to finding, through mathematical techniques, alternative routes/decisions to a complicated business situation (that will be defined based on objectives, requirements and restrictions). This technique is used based on the continual processing of data to suggest different decision options that could benefit from a potential business development or mitigate a future risk.
- **Machine learning:** an analytics discipline that makes it possible to **identify, through the processing of large amounts of data, intricate patterns** and predict, through the use of algorithms, different behaviours (in addition to being able to improve independently over time).

Using the technological platform and the collected and processed data, the Mallorca STO will be able to carry out the following activities:

Descriptive analytics	Provides explanations and information (insights) on what has happened.
Predictive analytics	Helps to picture and predict what could happen.
Prescriptive analytics	Given the parameters, it seeks to determine which is the best option among all those possible.
Machine learning	Seeks to find intricate patterns by processing large volumes of data.

Thus, the Mallorca Sustainable Tourism Observatory will be set up as a Sustainable and Tourism Intelligence System that will have an effect on basically all of Mallorca's economic and social sectors as a destination, offering a decision-making process based on data (data-driven managing process) that will be used to start with and develop on. This will help us to:

- Anticipate market behaviour.
- Improve the destination's strategic planning process.
- Adapt the availability of new air and sea connections to new markets or new potential markets.
- Redesign the digital marketing and communication strategy.
- Help to strengthen specialised tourist products (together with the Product Clubs) and to define new tourist products based on the visitor experience concept.
- Enhance products that are considered strategic for Mallorca as a tourism destination, like culinary, cultural, MICE, sports ... tourism.
- Improve tourist in-flow and movement management in the destination.
- Work to reduce the negative opinion locals have of tourism (overtourism) by looking for insights on this problem and improving the information people have on issues concerning the improvement of environmental and tourism sustainability.
- Set up a robust Open Data project on tourism and sustainability, providing access to all of the STO's deliverables and allowing researchers, stakeholders, and the general public to access the data.

In conclusion, the Sustainability and Tourism Intelligence System (Smart and Sustainable Tourism) will better manage tourist activities within the framework of the United Nations Sustainable Development Goals and the Mallorca Island Council's Strategic Tourism Plan.

2.1 Current Monitoring Issues & Indicators

In this section, we will summarise the different measurement components, the groups of indicators, and the individual Key Performance Indicators (KPIs) that are going to be processed by the Mallorca STO. Due to the vast amount of indicators that are going to be processed, we will include a summarised table in this section, and we will go into detail in Annex I "Detailed description of the indicators to be monitored by the Mallorca STO". First, we will include tables with the groups of indicators UNWTO defines as mandatory. Then we will have tables of groups of indicators and individual KPIs that we believe better represent Mallorca's peculiarities as a Sustainable destination. In Annex I, following the same system, we will go into more detail for each indicator, identifying which are already being monitored and how, also indicating how often they are being measured. We will also include those not being monitored but that we have enough information about to calculate them, those that are not being measured at all and those with unknown data sources.

The UNWTO mandatory indicators that the Mallorca STO will measure are listed below:

2.1.1 Local satisfaction with tourism

Criteria (components of the issue area)	Indicators
Degree of local satisfaction with tourism	2 KPIs
Community attitude towards tourism	2 KPIs
Visitor – resident ratio	5 KPIs
Social benefits associated with tourism	1 KPI
Housing issues	5 KPIs
Economic barriers	2 KPIs
Quality of neighbourhoods	1 KPI

2.1.2 Economic Benefits at Destination Level

Criteria (components of the issue area)	Indicators
Business investment in tourism	1 KPI
Tourism flow	2 KPIs
Revenues generated by tourism	6 KPIs
Tourism enterprise(s) performance	3 KPIs
The vitality of the local tourism industry	7 KPIs
Impacts of tourism on local income	1 KPI
Competitiveness of tourism businesses	3 KPIs

2.1.3 Employment, HR/Labour

Criteria (components of the issue area)	Indicators
Quantity and quality of employment	15 UNWTO/ETIS KPIs
Gender equality in tourism	6 KPIs
Access of tourism employees to health and safety	2 UNWTO KPIs

Family support for tourism employees	3 KPIs
Education, training, capacity development in tourism	9 KPIs

2.1.4 Tourism Seasonality

Criteria (components of the issue area)	Indicators
Degree of seasonality	5 UNWTO/ETIS KPIs
Strengthen shoulder season and low season tourism	4 UNWTO KPIs
Provision of sufficient infrastructure, services and products year-round Seasonality and employment	3 UNWTO KPIs
Provision of sufficient infrastructure year-round (especially services for tourists in high season and local communities in low season)	2 UNWTO KPIs

2.1.5 Energy Management, Climate Neutrality

Criteria (components of the issue area)	Indicators
Climate change mitigation measures	4 KPIs
Energy consumption	3 UNWTO/ETIS KPIs
Energy production	1 KPI

2.1.6 Water Management

Criteria (components of the issue area)	Indicators
Overall water use relative to supply	1 KPI
Water use/ water consumption	7 KPIs
Water Security	1 KPI
Water Quality	1 KPI
Seasonal shortage, water shortages	2 KPIs
Cost and pricing of water	1 KPI

2.1.7 Wastewater (Sewage) Management

Criteria (components of the issue area)	Indicators
Sewage treatment systems	4 KPIs
Wastewater	3 KPIs

2.1.8 Solid Waste Management

Criteria (components of the issue area)	Indicators
Solid waste management	3 UNWTO/ETIS KPIs
Solid waste reduction	8 KPIs
Maintaining a clean image for the destination	3 UNWTO/ETIS KPIs

2.1.9 Tourism Governance, Destination Management

Criteria (components of the issue area)	Indicators
Strategic planning and implementation	7 KPIs
Environmental and social impact monitoring	2 KPIs
Sustainability certification schemes and quality awards	6 KPIs
Branding, image and ranking of the destination	9 UNWTO/ETIS KPIs
Information and awareness building on sustainable tourism	5 KPIs
Public support for tourism development	3 KPIs

2.1.10 Climate Change Adaptation and Extreme Weather Events

2.1.10.1 Adaptation

Criteria (components of the issue area)	Indicators
Level of damage related to extreme climatic events	2 KPIs
Climate change adaptation and mitigation strategy	7 KPIs
Climate change and exposure to risk	1 ETIS/UNWTO KPI
Degree of planning for climate change impacts	1 ETIS/UNWTO KPI
Level of damage related to extreme climatic events	1 UNWTO KPI
Greenhouse gas emissions by distillation and by tourism component	2 KPIs
Transportation fuel use	2 KPIs
Impacts on foreshore	1 KPIs
Impacts on mountains and woods	1 KPI
Impact on wildlife and biodiversity	2 KPIs

2.1.10.2 Mitigation

Criteria (components of the issue area)	Indicators
Greenhouse gas emissions by the destination and by the tourism components	2 KPIs
Transportation fuel use	2 KPIs
Coverage of natural areas	1 KPI

2.1.11 Sustainable Tourism Practices

Criteria (components of the issue area)	Indicators
17 Sustainable Development Goals	351 KPIs

2.1.12 Universal Inclusivity

Criteria (components of the issue area)	Indicators
Access to the destination	4 KPIs
Access to public buildings, hotels and tourist services	2 KPIs
Access to tourist attractions including cultural and natural sites	2 KPIs
Assistance when needed	1 KPI
Level of satisfaction with the destination and its attractions - people with reduce mobility	1 KPI
Visitor behaviour, wellbeing and satisfaction	9 KPIs
Access for all, low barrier tourism	5 KPIs

2.2 Destination Specific Issues, Monitoring Issues & Indicators

2.2.1 Innovation

Criteria (components of the issue area)	Indicators
Innovative capacity	9 KPIs
Technological preparedness	3 KPIs

2.2.2 Sustainable production and consumption

Criteria (components of the issue area)	Indicators
Supporting local entrepreneurs	3 KPIs
Tourism supply chain	1 ETIS KPI
Sustainable tourism and sustainability aspects	5 ETIS/UNWTO KPIs
Identifying the market for more sustainable products	3 UNWTO/ETIS KPIs

2.2.3 Biodiversity and nature protection

Criteria (components of the issue area)	Indicators
Landscape and biodiversity protection	2 ETIS/UNWTO KPIs
Sustainability of key species	1 UNWTO KPI
Biodiversity conservation and maintenance of protected areas	6 UNWTO KPI
Relationship between tourism and protected environments	5 KPIs
Protection of sensitive environments	4 KPIs

2.2.4 Cultural heritage and traditions

Criteria (components of the issue area)	Indicators
Legislative basis for protection	2 UNWTO KPIs
Conserving built heritage	3 KPIs
Heritage promotion	2 KPIs
Enhancing cultural heritage	1 ETIS KPIs
Attraction protection	2 KPIs
Visitor management	1 KPI
Visitor behaviour	2 KPIs
Cultural heritage protection	1 KPI

2.2.5 Mobility

Criteria (components of the issue area)	Indicators
Knowledge of tourism-related mobility patterns	5 KPIs
Access to the holiday destination	4 KPIs
Reducing transport impact	4 NWTO/ETIS KPIs
Standards of fossil fuels consumption, air quality and noise in the destination	4 UNWTO KPIs
Transport services and mobility in the destination	12 UNWTO/ETIS KPIs
Parking spaces	2 UNWTO/ETIS KPI
Knowledge of mobility patterns related to tourism	5 KPIs
Access to holiday destination (availability/improvement of airport infrastructure and rail, port and road networks)	3 KPIs
Level of accessibility to the area in terms of public transport	1 KPI
Travel time and reliability	2 KPIs
Tourism destination competitiveness, availability of infrastructures	15 KPIs

2.2.6 Land use, spatial planning and tourism development control

Criteria (components of the issue area)	Indicators
Whether any land use or development planning process exists explicitly incorporating tourism	3 KPIs
Extent and effectiveness of monitoring control processes	4 UNWTO KPIs
Whether or not there is systematic enforcement of the plan and its criteria	2 KPIs
Planning regulations	1 KPI
Erosion	2 UNWTO/ETIS KPIs
Visual pollution	3 UNWTO/ETIS KPIs
Integration with the landscape	1 UNWTO KPI
Physical form	1 UNWTO KPI
Siting and orientation	1 UNWTO KPI
Development planning plan explicitly incorporating tourism	3 UNWTO KPIs

2.2.7 Visitor management, control of use intensity and territorial distribution. Capacity planning

Criteria (components of the issue area)	Indicators
Carrying capacity	5 UNWTO KPIs

2.2.8 Visitor satisfaction and behaviour

Criteria (components of the issue area)	Indicators
Customer satisfaction	5 UNWTO/ETIS KPIs
Visitor health, safety and security	12 KPIs
Quality of experience and services	2 UNWTO KPIs
Sports & tourism	11 KPIs

2.2.9 Health Safety and Security

Criteria (components of the issue area)	Indicators
Health Safety and Security	8 KPIs



3 OBSERVATORY MANAGEMENT

3.1 Observatory organisation and processes

3.1.1 Integration of Observatory Partners

Coordination between the public and private sector in terms of tourism management and environmental sustainability has not always been easy, and more so now because of COVID-19. Sometimes their objectives are different, and discussions about promotional initiatives for the industry, destination marketing, research, and the situation's analysis can be complicated. At present, uncertainty related to demand and its expectations, policy actions regarding air transport, for example, or the opening of restaurants and other complementary services and how these decisions can affect the safety and security of our residents, the people employed in tourism and visitors, make it, now more than ever, crucial to work together.

In these difficult times, the Mallorca Sustainable Tourism Observatory will be an interrelation forum that will bring together all tourism and sustainability stakeholders. It will be a meeting place where joint initiatives will be proposed based on data analysis, trends, and different ways people see reality. Data is becoming more and more important because the sector's whole value chain is based or almost entirely based on data. Data from before people travel, when they start checking out tourist destinations, experiences, transport and accommodation to data from when they are on the island, enjoying its ambience and people.

This overwhelming amount of information means that, on the one hand, it is possible to almost perfectly identify the tastes and preferences of travellers and on the other hand, measure the impact tourism has on certain aspects directly related to the real situation in the region. Being able to predict demand and how it would develop and subsequently adapt the rendering of services used to be done to a certain degree of predictability and would stay more or less the same for a few years, but now things have changed radically, and we need to do this (market segmentation, marketing estimates, marketing and communication policies, etc.) every few months.

The STO will help us design better responses to satisfy our visitors and residents to minimise the impact of tourist activity and repair, as much as possible, the deterioration caused by this activity in the past.

All this happens by providing, all the members/stakeholders (and other actors in the tourism value chain and environmental management) with a new culture in which the capture, management and interpretation of the travellers, companies in the tourism sector, residents, other sectors, etc., will serve as an inspiration and a management tool by incorporating the data and knowledge that is extracted from them as part of the tourism and environmental management system. As McKinsey indicates, governments and public administrations such as the Mallorca Island Council, promoter of the STO, **have the opportunity to reinvent their role in the value chain by offering data infrastructures and analytical capacities to the tourism sector and the whole of society to investigate and develop new innovative and advanced operating models.**

When designing Mallorca's Sustainable Tourism Observatory's structure, we need to keep in mind the Observatory must be a real observation tool and a tool capable of managing complicated procedures that occur around tourism and make it a meeting place for stakeholders and tourism development intervention tools. And this is why the Mallorca STO will be composed of the following operational departments:

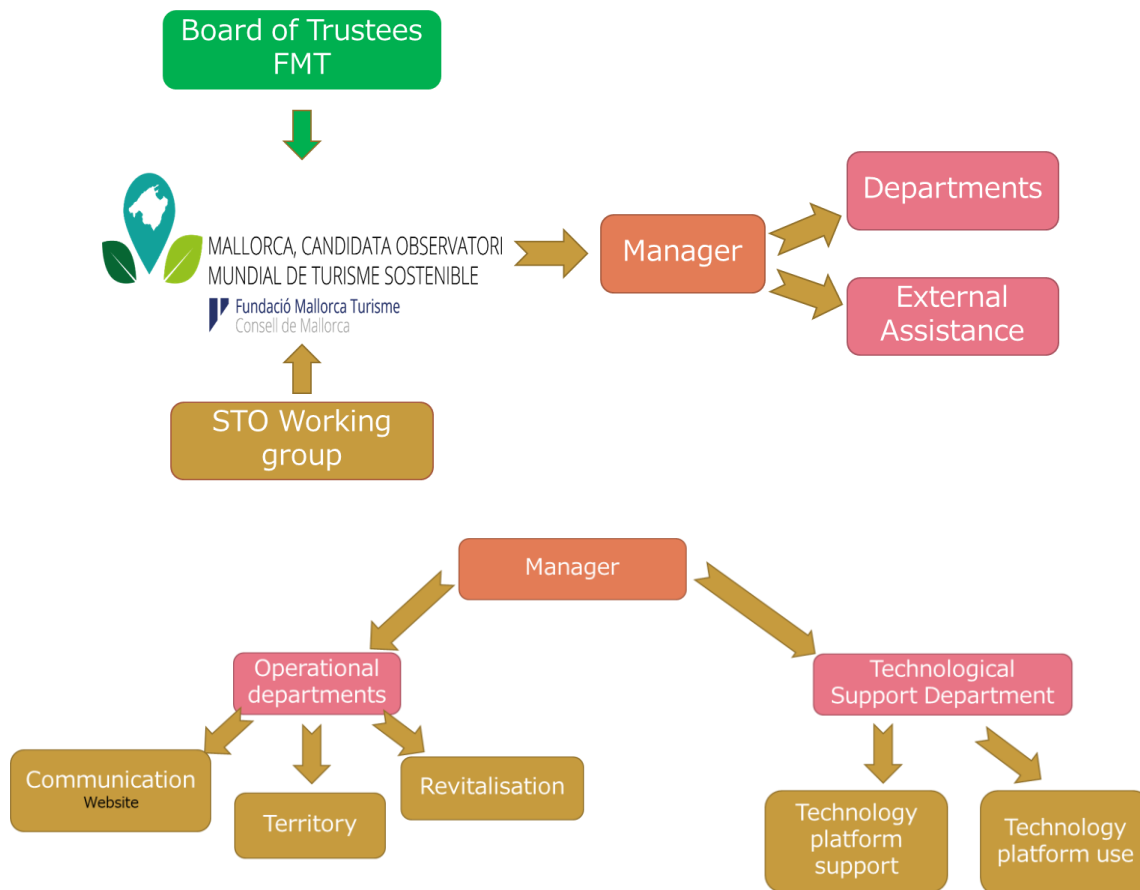
- **Territory Department.** This department will be in charge of collecting information about the territory's resources and the communities living there, as well as the landscape's artificial and physical features (climate, infrastructures, etc.) with the aim of learning how to coordinate economic, social, political, and environmental aspects when intervening. It will analyse the impact of Mallorca's different stakeholders' (Island council, town council, companies, association, etc.) initiatives in terms of sustainability in the destination. To analyse the impacts effectively, we really need to know what we are starting with, define the assessment and measurement tools that will show us the initial status (usually indicators, KPIs) and see how they evolve depending on the initiatives previously mentioned.
- **Revitalisation Department.** In charge of involving the relevant stakeholders that are part of the different analysis fields and capturing the information they generated, and that is essential for their complete understanding and correct management. This department will be responsible for coordinating stakeholders (public administration, companies, pressure groups, citizens, etc.) and generating dynamic information bases, databases, and tools. To do this, it is necessary to:
 - Adapt the initiatives' raw material and data to make a more coherent and clear reading in view of the decision-making, forecasting and knowledge objectives.
 - Involve citizens, asking for their advice more and getting the civil society to participate directly in projects and their implementation.
 - Encourage "governance", understood as the consensus-building process that brings together private, associative, and public actors around a specific problem, to define similar objectives and coordinate their capacities, the principles of territorial governance, propose the coordination of different actors and the involvement of the actors/citizens in the management of their own territory. In the systematic, it will be necessary to carry out a conscientious work with the actors of the region: producers, consumers, politicians, etc. The system will entail working closely together with the stakeholders: producers, consumers, politicians, etc.

This department will have an experienced consultancy team made up of people from the tourism industry, who know a lot about the sector, and others working or involved in environmental "business". This team will be responsible for coming up with key questions, raising the critical issues that need to

be analysed and studied and proposing the hypotheses to be assessed. They will also carry out all the necessary research.

- Communication department.** Spatial information will be useful as long as it reaches its users (land-use managers, companies, technicians, residents, etc.). It will be a system that will get its information from its users' proposals. The links between communication and geomatics will be how land use information will reach the general public, and this will be fundamental for the tools developed to be useful.
 - Adapt the initiatives' raw material and data to make a more coherent and clear reading in view of the decision-making, forecasting and knowledge objectives.
 - Organise how the information will be shared and spread among all of the stakeholders.
- Technological Support Department.** This department will be in charge of collecting and intaking data, processing it, getting the technical platform up and running, developing all the necessary algorithms, modelling data, security, and building the dashboards, drafting reports and all other deliverables. It will also be responsible for Mallorca's STO's platforms, technological operation and maintenance.

The following diagrams represent the said structure's design:



Each of these teams will be made up of specialised technicians in the areas mentioned above, and they will be supported by staff from the stakeholder organisations who will dedicate time to research and/or develop studies or define new deliverables that could be of interest to the STO.

Researchers from different organisations and institutions will join them and take advantage of this crucial data and the solutions and the technological capabilities deployed by the OTS to develop basic or applied studies in tourism and environmental sustainability advanced matters.

3.1.2 Research structure

The development of the research activity will be organised by the operational departments of the Mallorca STO and, more specifically, by the Habitat/Land use and Revitalisation departments because, on the one hand, their goal is to discover the need of knowing and/or data for a specific topic. On the other hand, it is where stakeholders, organisations and researchers will be able to access deliverables or source data to carry out further analysis and/or research. The role of the University of the Balearic Islands and other research centres will be critical in this structure due to their continuous need to access complete and up-to-date data sources on multiple subjects (economic, social, environmental, etc.). For this reason, we see that research will arise from two vectors, an internal one from the STO's operational departments and an external one, from stakeholders and/or researchers/external bodies that require access to STO's data or deliverables.

These potential new research activity petitioners will be managed and supported by the Mallorca STO's technical platform exploitation team (Environmental and Tourist Intelligence System) belonging to the STO's technical support department. This department will be in charge of building or helping to build the new data models, algorithms or reports the previously mentioned research teams may need.

3.1.3 Observatory participation and communication procedures

For this destination to walk the sustainability path, one of Mallorca's STO's objectives will be cooperation, exchanging information and knowledge. Therefore, it is created with a participatory spirit and a vehicle to transmit communication. The work it develops is one hundred per cent effective and makes it possible to meet the objectives mentioned above that affect the island's entire tourism industry.

3.1.3.1 Launch

The starting point is a working group – a Committee of Experts that will help develop an impressive Observatory project. Made up of experts in tourism and sustainability's three linchpins – from a range of different fields (academic, political, social and economic), this team is helping to make the final outcome a real and substantial project.

From July 2020 to January 2021 the scheduled calendar was implemented and within this timeframe participation and communication sessions were organised that have helped FMT in their task of drawing up the documents needed to manage and submit their Sustainable Tourism Observatory Application. The main initiatives carried out during this period were:

- The creation of a **Committee of Experts, the Observatory's advisory body**, with representatives from the tourist, economic and social, public and academic fields (University of the Balearic Islands).

- **Training and dissemination and awareness-raising activities** for students in Mallorca: 120 workshops have been carried out at schools, for children in their last two years of primary school and secondary education and at the university.
- **The Coordination and dissemination initiatives** with the general public, representatives from the social and economic networks in particular: during this period, thirty-five awareness-raising and dissemination campaigns were carried out from July to December 2020 to inform organisations and town councils about the proposal in case they wanted to carry out activities with stakeholders, etc.
- The creation of an **informative website**: providing information about the INSTO application and for citizens to support it www.observatori.fundaciomallorcaturisme.net
- **The publication of an informative comic** published by Mallorca's Comic Cluster that goes over the history of tourism in Mallorca and gives an insight for the future with 2030 in mind and based on the SDGs.
- The signing of an agreement with the University of the Balearic Islands: **drafting of a white book on the SDGs applied to the tourism sector in Mallorca**, that will be presented in early 2021.

3.1.3.2 Marketing and communication initiatives in major source markets

Recurring dissemination of the Observatory's findings and the derived measures among the main source markets: Germany, Great Britain, Spain, France, Benelux, Switzerland, Scandinavian countries, Portugal, all other European countries, Asia and America.

Main initiatives will be those indicated by the data and that have traditionally consisted of:

- Offline and online press campaigns (through agencies in the destination Fundación Mallorca Turismo, coordinator of the Observatory, works with)
- Visits to general tourism trade fairs and specific product trade fairs.
- Workshops
- Roadshows
- Informative and awareness-raising workshops
- Press trips
- Fam trips

At times, the coordination of these initiatives will be carried out together with the World Tourism Organization and Turespaña.

3.1.3.3 Observatory correlation with Mallorca's 2020-2023 Strategic Tourism Marketing Plan

The Observatory's development is closely linked to the Mallorca Tourism Promotional Plan for the 2020-2030 period from which other communications and participation initiatives emanate. The Observatory will be directly involved in some of these, and the following should be highlighted:

Joint marketing. These are calls published by Fundación Mallorca Turismo to carry out initiatives targeted at promoting tourism in the German, British, Nordic countries, and national markets primarily, but also in the

French, Benelux, Russian and Swiss markets. They are based on public-private partnerships, and by joining forces, the marketing campaigns will have a much greater impact, and marketing channels will also grow. The purpose of the call is to attract tourism flows that are coherent with the issuing markets and product segments that are considered strategic and also boost the mid and low seasons.

The advertising campaigns' tourist segments need to focus on are sports, MICE, nature, luxury, active, cultural/heritage, and culinary tourism; prioritising online campaigns.

The first initiative related to the above was carried out in 2020 through two calls (one published in February and a second in September). Advertising campaigns in the range of one million euros were launched.

The virtual marketing exhibition-fair "Mallorca Virtual Show. The potential sector involved in this initiative includes companies that are members of "product clubs", another clear example of public-private partnerships where the public administration is represented as well as the accommodation and restaurant sectors, business and service activities, cultural agencies, tour operators and travel agencies.

The main goal was to create a virtual platform where stakeholders could interact with each other to promote Mallorca and offer those interested a new business channel.

Joint Marketing Initiatives carried out by the Island Council and Turespaña and included in the 2020 Activity Plan proposed by Turespaña. The Observatory will strengthen the already close relationship Mallorca has with Turespaña and the different tourism offices located in its most prominent source markets. As an example, for 2020, we had thirty-six activities scheduled with Turespaña's various tourism offices, highlighting: agent trips, agent training, press trips, public information points, direct seminars, presentations for agents, meetings and presentations with representative prescribers, online publicity, local campaigns, campaigns with market partners, participation in initiatives organised by tour-operators, support at points of sale/showcases/catalogues, trips for bloggers and influencers, press packages and informative material.

Initiatives carried out by the Mallorca Island Council together with the Product Clubs (Strategic Segments). As an active member of the Balearic Island's Product Clubs or STSs, the Island Council may even enhance its participation through the Observatory's improvements.

As an example, by clicking on the following link, you will be redirected to the 2021 Action Plan: <https://fundacionmallorcaturisme.net/wp-content/uploads/2020/11/Pla-dactuaci%C3%B3-2021.pdf>; it must be noted that the exceptional nature of the current global situation caused by the Covid19 pandemic, could lead to the cancellation or postponement of these actions.

3.1.4 Assessment procedure

As the Observatory is developed, new assessment measures will be implemented for accurate monitoring. Initially, the following are proposed:

INITIATIVE	FREQUENCY
Report on the initiatives carried out and on the findings submitted to UNWTO	Yearly
Report on the initiatives carried out and on the findings submitted to FMT's Advisory Body and Board	Biannual
Organisation of conferences open to the general public, explaining to them and listening to them	Depending on the frequency established (at least once a year)
Project presentations to the stakeholders	Before submitting each project

3.2 Observatory Next Steps

3.2.1 Observatory Action Plan

The Mallorca Sustainable Tourism Observatory Action Plan is organised around three main pillars:

- Data integration
- Active listening
- Dashboard creation with KPIs that will help us take action before things happen, act more according to the situation and make analyses.

Thus, the Observatory will be in charge of:

- Analysing all the data available in the ecosystem of organisations that support the observatory
- Defining the key indicators (KPIs) and detecting errors in data.
- Defining a Big Data technological architecture for data collection and processing.
- Designing models of Artificial Intelligence/Machine Learning and Advanced Analytics for the exploitation of this data.
- Designing the Observatory's deliverables: following the Open Data model and with ad hoc and regular reports.
- Creating dashboards for information and management, as well as for decision-making.
- An early-detection tool.

3.2.2 Active participation in Tourism Product Clubs (TPCs)

The activity carried out by the Observatory will be closely related to initiatives already being implemented by the Department of Tourism and Sports, highlighting the work already being carried out in coordination with Strategic Tourism Segments (STSs).

TPCs are partnerships between service providers and public organisations, including the Mallorca Island Council, coordinated by the Balearic Islands' Regional Government. The idea is that relevant stakeholders work together and join forces to develop tourism products with a greater 'added value'. All of the value chain's links are represented from its planning to its positioning on the market.

STSs define the strategy and plan the initiatives aimed at improving the Balearic Islands competitive position by adding value to its tourism products while also enhancing its elements' productivity. Likewise, different tourism product specialised round-tables are organised that promote and make it easier for the sector's professionals to meet up and get the most out of the synergies generated by these public-private partnerships.

One of the Government of the Balearic Islands' Strategic Tourism Segments' (SET) priority objectives is to support the private sector, directly or indirectly linked to the corresponding tourism product.

Anyone, company, organisation or institution (both public or private) that wants to work with others to help improve tourism in the Balearic Islands can become an STS member.

Those that currently exist, and the Observatory will directly interact with are:

- Active
- Gastronomy
- Sports
- Luxury
- Health and wellness
- Cultural
- Ecotourism
- MICE

3.2.3 Synergies between the Action Plan and other already existing programmes related to tourism

With the implementation of the objectives set out by the Communication plan and through strategic segments different to those of sun and sand, we are working with:

ACEVIN: Spanish Association of Wine Making Cities

- Promotion of agroindustry
- Urban planning
- Promotion of Wine Tourism and Culture
- Promotion and recovery of Industrial Heritage
- Creation of instruments for local promotion and the diversification of economic activity

SABOREA ESPAÑA (Taste Spain): Culinary Destinations

- Promotion of gastronomy
- Promotion of local products
- Encouraging circular economy
- Economy diversification
- Km0 product promotion (local products)
- Cut downs on waste

SPAIN CONVENTION BUREAU:

- Promotion of Mallorca as a MICE destination
- Make tourism less dependant on season factors
- It has eight venues for meetings and countless one-of-a-kind venues

3.2.4 Relevant Stakeholders

Mallorca is an island in the Spanish self-governing region of the Balearic Islands. The Statute of Autonomy of the Balearic Islands was approved by Organic Law 2/1983. In Mallorca, executive powers fall under the Mallorca Island Council and the Autonomous Government of the Balearic Islands, its legislative branch under the Balearic Islands' Parliament, and its Judicial branch under the Balearic Islands' High Courts of Justice. All of these bodies have their headquarters in the Palma de Mallorca, the capital.

Publicly, the body in charge of tourism on the island is the Department for Economic and Finance, through the Subdepartment for Tourism. They have tourist information offices in Palma and at the airport (Mallorca Island Council, 2018).

At present, tourism planning in the Balearic Islands, both in terms of strategy and marketing, involves a sound structure, inputs and participation from many private companies, and the public administration.

At the regional level, the Balearic Government, through AETIB, is in charge of tourism planning. At the municipal level, each city/town council carries out individual efforts to promote and boost tourist activity in their municipalities.

3.2.4.1 Public Sector



G CONSELLERIA
O MODEL ECONÒMIC,
I TURISME I TREBALL
B AGÈNCIA ESTRATÈGIA
/ TURÍSTICA ILLES BALEARS

The Balearic Islands Tourism Strategy Agency (AETIB for its acronym in Spanish) belongs to the Regional Ministry of Economic Model, Tourism and Labour that is part of the Balearic Islands Autonomous Government. AETIB is in charge of developing the Balearic Islands' tourism strategy and managing the fund's (ITS) resources to promote sustainable tourism. This sustainable tourism strategy aims to help reduce the impact of tourism activity and improve the Balearic Islands' international positioning.

The **Balearic Islands' Federation of Local Bodies** (FELIB for its acronym in Spanish) has the following goals:

- Defend and promote the common interest of its member organisations and foster and defend their autonomy, in the frame of the Constitution of the Balearic Islands' Statute of Autonomy and what these Statutes establish.
- Foster and defend the language and culture of the Balearic Islands in local life.
- Promote studies on problems and issues that affect member organisations.



- Spread knowledge about the insular and municipal institutions and encourage citizen participation in local activities.



City/Town Councils. There are 53 city/town halls in Mallorca, some of which are in turn regrouped into **communities of municipalities (*mancomunitades*)**. A community of municipalities is regulated by the Spanish legal framework that creates a higher local body where member municipalities delegate certain activities or responsibilities so that the community provides a joint service for all its members. There are six communities of municipalities on the island of Mallorca: the *mancomunidad del Pla de Mallorca*, *mancomunidad del Raiguer*, *mancomunidad de Tramuntana*, *mancomunidad Norte*, *mancomunidad Sur-Mallorca* and *mancomunidad del Migjorn*.

The **University of the Balearic Islands** (UIB for its acronym in Spanish) is an avant-garde university that goes back more than forty years. It holds top positions in teacher and researcher ranking lists. It has more than 16,000 students and nearly 1,700 teachers, professors and researchers who create a pleasant environment in tune with a range of leisure, healthy living and constant learning options.



Universitat
de les Illes Balears



Cambra de Comerç
Mallorca

Mallorca Chamber of Commerce. This organisation is a public-law corporation that provides services to companies and defends the general interest of trade, industry, services and navigation. The Chamber of Commerce works with the public authorities and the business environment to boost sustainable economic development. It is represented in many organisations and round tables. The Mallorca Chamber of Commerce is a member of Cámara España and works actively with other official chambers of commerce in other regions: Spanish, Mediterranean, European and international.

AENA (Spanish Airports and Air Navigation). AENA is a Spanish state-owned company that manages general interest airports in Spain. It operates 45 airports and two heliports in Spain. Through its subsidiary company AENA Internacional it also participates in the management of fifteen airports in Europe and America, making it the world's number one airport operator in terms of passenger traffic.





The **Balearic Islands Port Authority** (APB for its acronym in Spanish). APB is a public organisation under the Spanish Ministry for Transport, Mobility and Urban Agency. State Ports. APB is responsible for operating Palma, Alcúdia, Mahon, Ibiza and La Savina Ports. Its responsibilities are:

- Development, authorisation and control of maritime and land operations related to port traffic and services.
- Organisation of the port service area
- Planning, project, construction, maintenance and operation of works carried out in the port and maritime signals.
- Management of the port area and maritime signals.
- Promotion of industrial and commercial activities related to port and maritime transport.
- Operations' coordination of the different transport modes in the port area.

State Meteorology Agency (AEMET for its acronym in Spanish). It aims to develop, implement and provide meteorological State services and support other public policies and private activities, contributing to the safety of people and goods, and the well-being and sustainable development of the Spanish Society. The Agency holds the status of State meteorological authority, as well as that of the aeronautical meteorological authority.



The **Balearic Islands Statistics Institute** (IBESTAT for its acronym in Spanish) is a public body under the Balearic Islands Government's Regional Ministry for Economic Model, Tourism and Labour. It is responsible for promoting, managing and coordinating public statistics and the Balearic Islands' Statistical System following Law 3/2020, May 17th, specifically section 34 relevant to its functions: a) Promote, manage and coordinate public statistical activity that is of interest to the Autonomous Community of the Balearic Islands; b) Prepare the preliminary draft of the Statistics Plan in cooperation with the islands' other units that are part of the statistical system. c) Propose the standardisation of concepts, definitions, classifications, terminologies and codes when classifying data and presenting results. Encourage their use in the Balearic Islands' statistical activity and promote, in the frame of its responsibilities, the methodological coordination with municipal statistics, those of other autonomous communities, the General State Administration, the European Union and international organisations. g) Promote statistical research and professional

development and training of people working with statistics. j)
Promote the widespread of statistics relevant to the autonomous community of the Balearic Islands.

3.2.4.2 Private sector



The **Mallorca Hotel Business Federation** was founded in 1976 and was the first of its kind in Spain. This leading tourist association encompasses small, medium, and large hotels companies from Mallorca. At present, it represents 196.962 beds in 844 properties. Its mission is to create a development framework that guarantees Mallorca's hotel industry's competitiveness and sustainability.

The **Agrupación de Cadenas Hoteleras** is an organisation founded in 1977 by the most important hotel chains in the Balearic Islands. Its members include Riu Hotels & Resorts, Barceló Hoteles, Iberostar Hotels & Resorts, Globalia and Sol Meliá Hoteles- Meliá Hotels International



AGRUPACIÓN DE CADENAS
HOTELERAS DE BALEARES



The **Balearic Islands' Business Association for Travel Agencies** (AVIBA for its acronym in Spanish). AVIBA is a company corporation for companies in the Balearic Island's tourism sector. It encompasses all those travel agencies that believe in corporatism, and that, through this union, seek to protect their general interests before all decision-making and centres. Its main objective is to generate more competitiveness, increasing the quality of the services rendered by its member agencies, while also respecting each of their individual interest.

Created in 1905, the **Mallorca Tourism Promotion Board** is one of the world's oldest tourism organisations. It comprises entrepreneurs and professionals from the tourism industry and currently acts as a forum for debate and opinion on matters related to tourism activity improvement. Its mission is to promote Mallorca's tourism activities to visitors, potential visitors and the Majorcan people themselves. It is an independent association of people and organisations committed to promoting tourism, the relevance of tourism in our society and economy, looking after the environment, being friendly to tourists and deseasonalization.



The Balearic Islands Impulsa Foundation is a platform for strategic knowledge and regional interaction that helps economic and social stakeholders with their decision-making and works to configure a productive transformation agenda that will significantly impact the Balearic Islands global competitiveness. The foundation focuses its activity on:

- Developing strategic initiatives that promote the alignment of economic and social stakeholders around the precepts provided by the new paradigm of global competitiveness, with the creation of a holistic vision to help identify value drivers, both public and private, capable of bringing the Balearic Islands' growth pattern nearer to that of more advanced European regions.
- Deploy innovative work vectors aimed at generating and incorporating strategic knowledge necessary for the design, implementation and follow-up of global competitiveness strategy that acts in favour of the islands' social and economic progress.
- Promote values that contribute to cooperation activities aimed at setting up consensual guidelines and action measures to successfully implement a productive tourism agenda among the region's quadruple helix.

The **International Cluster for Information and Communication Technologies applied to Tourism (TURISTEC)** is the Balearic Islands' first industrial cluster. The organisation was also the first in Spain to bring together the tourism industry's know-how. Its mission is to:

- Promote innovation and digitisation initiatives that contribute to the growth of its members in particular and of the tourism sector and ICTs in general.
- Identify new business models that appear on the market and funding sources for projects that may interest its members.
- Promote new business opportunities among the cluster's members by knowing what needs members have and what solutions others offer.
- Create a shared space for knowledge generation and cooperation among the cluster's members and other institutions and organisations related to technology applied to the tourism sector.



3.3 Observatory Expected Impacts

3.3.1 Forecast of the main findings

The fact of being a member of UNWTO's Network of Observatories will allow Mallorca to have a positive impact on the following socio-economic aspects:

- Monitor tourism's economic, environmental and social impact at destination level.
- Support and connect different destinations to improve evidence-based decision making.
- Set up a dynamic network of partners to create healthy and resilient destinations.
- Minimise the impact of tourism on the land helping it restore itself.
- Improve and increase the island's visibility as a top-quality, sustainable and safe tourist destination.
- A commitment of the entire tourism value chain.
- General awareness of society, making sure they know how important it is for the tourism sector to be sustainable for it to prevail and continue throughout time.
- Coordinate strategies and policies: real public-private coordination.
- Defend the value of tourism as the driver of economic growth under sustainability and fair social development criteria.
- Enhance Mallorca as a tourist destination and use new technologies to guarantee sustainable development.

3.3.2 Environmental impacts

One of the main findings of the Observatory's creation, in coordination with the rest of initiatives such as the UNTWO.QUEST certificate is a better destination governance, seeking to optimise human resource management, and adopt tools for innovation, sustainability and competitiveness based on strategic planning and systematic, timely and regular monitoring of tourism performance and its impact on improving its responsible management.

The environmental commitment objectives we hope to meet are:

- The promotion of tourism products that enhance the value of Mallorca's natural, cultural, land, traditional and landscape resources.
- The correlation of sustainability with developing a tourism model based on comprehensive quality management and environmental management innovation.
- The assessment and measurement of the economic, social and environmental impact of tourism activity on the island of Mallorca by developing a System of Sustainability Indicators to meet specific and environmentally assessable goals.
- Keeping tourists informed about how important it is to use resources responsibly: launching campaigns to raise awareness on the importance of responsible use of resources, concerning the host destination and adherence to the environmental challenges we have as a destination; and making residents and visitors aware of the importance of sustainable tourism.

- The promotion of a tourism model based on a rich, varied and well-protected cultural and natural heritage with endogenous values that strengthen the identity and authenticity of the territory that needs to be preserved and a tourism sector that contributes to making it better and everlasting for future generations.

Likewise, the Observatory will contribute significantly to the conservation and preservation of our natural habitat. We expect to promote initiatives to recover and enhance the natural heritage to make it attractive and raise awareness of its importance and the need to preserve it.

Another objective to be met is the mitigation of climate change. A policy to promote prevention and responsible consumption should include generalised and media campaigns to raise environmental awareness. These campaigns must highlight the origin of excess waste problems, the social and ecological effects of current consumption and encourage society to change their habits and move towards responsible consumption. In this process, bridges of collaboration must be created and fostered between the public administrations and social and environmental organisations.

To successfully implement a programme like this one, the conviction, support and complicity of the general public and all implicated economic sectors is essential to move towards a more responsible environmental and ecological culture.

In the socio-economic sphere, the following aspects will be proactively addressed:

- The use of local products, renewable resources, sustainable mobility and technologies that will reduce the ecological footprint, supporting companies that, aware of their environmental and social responsibility, invest in these matters.
- The use of tourist activity –the positioning and dissemination opportunities offered—as a showcase for other productive activities that can be carried out in Mallorca.
- The correlation between agricultural land preservation and a balanced territorial proposal that will link nature, culture, and the landscape, acknowledging the agriculture’s significant role in the promotion and viability of this model.
- Support organisations that are acknowledged for their social responsibility and commitment to sustainability and the environment in their promotional activities.
- Increase tourism profitability, with visitors consuming more, spending more, choosing more profitable segments, staying longer, and promoting the winter season.

In the frame of promoting the development of sustainable tourism through the observatory together with other projects led by the insular council such as “The Tourism Sector’s Challenges”, we will measure the level of sustainability on the island of Mallorca, and our goal will be to improve it following the World Tourism Organization’s criteria based on the following parameters:

- Solid waste management
- Mobility
- Water management, business structure
- Wastewater management

- Safety and security
- Economic benefits of the destination
- Tourism seasonality
- Employment
- Energy management
- Climate change and destination capacity
- Universal accessibility and inclusivity
- Local satisfaction
- Governance

Sustainable tourism management involves efficient use of resources and responsible consumption of the tourism sector to reduce the impact of tourist activity on the natural environment, resources and fight against climate change.

As a tourist destination, to efficiently use basic resources like water or energy, we must encourage tourist companies to carry out their activity respecting the environment. And to do so:

- Tourist facilities need to be modernised, and technological tools implemented to monitor water consumption and improve energy efficiency.
- We need to promote awareness and disseminate the best practices aimed at companies in the sector in collaboration with sectoral associations to encourage efficient water use, lower energy consumption, waste management and a circular economy.
- Campaigns need to be implemented together with the tourism sector to make tourists aware of the need to use water and energy responsibility at hotels and restaurants and reduce food waste.

3.3.3 Regional Development

By making tourism a strategic pillar in regional development policies, the sustainable tourism observatory will contribute to Mallorca's rural development. The significant improvement in innovation, technology, the digitalisation process, product development and integration of the value chain will contribute to building a fair, inclusive, resilient and sustainable sector that will benefit and increase rural communities' wellbeing. It will also contribute to establishing sustainable practices and policies in rural destinations. As such, the Mallorca Sustainable Tourism Observatory will be aligned with UNWTO's recommendations on tourism and rural development.

ABOUT...

4 ABOUT FUNDACIÓ MALLORCA TURISME

Fundació Mallorca Turisme is a non-profit public organisation, part of the Island Council of Mallorca. Its purpose is to promote tourism on the island in national and international markets, as well as create tourist products, manage tourism services in general and all activity aimed at promoting tourism on the island.

Among the Foundation's primary initiatives carried out to materialise its mission, those that stand out are:

- the organisation of and participation in international and national meetings and events to promote tourism.
- the enhancement of Mallorca's reputation as an audiovisual set and destination for film tourism in foreign markets through the Mallorca Film Commission.
- cooperation with public and private tourism stakeholders to coordinate initiatives to promote and consolidate different tourism products.



To develop its founding objective, among others, the Foundation carries out the following activities:

- Manage Mallorca's tourism services.
- Organise activities to promote the island as a tourism destination on the island itself, in the other Balearic Islands, Spain, and also internationally.
- Coordinate tourism marketing activities with other public tourism promotion organisations.
- Help provide the island's tourism sector's professionals with the necessary means to help them be more competitive in foreign markets.

- Provide support and promote communication and collaboration among all of the Mallorca's tourism sector's agents.
- Help the tourism sector by making it easier for them to be present in international trade fairs and markets.
- Promote training for professionals working in the tourism sector and those responsible for tourism products in the public sector.
- Promote activities to enhance Mallorca's reputation as a film set for films and other audiovisual works and boost film events on the island.
- Promote the organisation of large events and other interesting activities for tourism that will consolidate Mallorca's different tourism products, as well as their promotion in international and national markets.

Although the Foundation is a public body, it has an Advisory Board for Tourism where the private sector acts as a strategic reference point in terms of advice and consultation. Some of the companies that make up this Board are the Mallorca Hotel Federation (FEHM for its acronym in Spanish), the Association of Hotel Chains and the Chamber of Commerce.

SCOPE: It is within this global framework of both public and private Institutions and Organisations that influence tourism in Mallorca where we find the "Fundació Mallorca Turisme". The foundation is part of the Mallorca Island Council, and this organisation's main goal and territorial framework is to promote and boost Mallorca's tourism sector. It does this by carrying out initiatives such as:

- A1. Promoting tourism in international and national markets, by organising and participating in promotion meetings and gatherings.
- A2. Enhancing Mallorca's reputation as a film set and tourism destination for filming, through the Mallorca Film Commission.
- A3. Creating and consolidating different tourism products.
- A4. Managing tourism activities in general and services through collaborations with different public and private tourism agents to coordinate marketing initiatives.

GOAL: All of these initiatives are supported and established based on two closely related fundamental principles:

- P1. The protection and safeguarding of Mallorca's landscape and cultural heritage.
- P2. The boosting of economy through quality and sustainable tourism.

4.1 Context and background, DTI Smart Island Mallorca

The Mallorca Sustainable Tourism Observatory is based on important projects that are already pouring innovation and tourism intelligence into the island's tourism sector. The Mallorca Island Council runs and implements the Smart Tourism Destination project (DTI for its acronym in Spanish), Smart Island Mallorca. This project is based on transversality as a key element for transforming the island into a 'Smart Island'. Vision This project will interconnect all of the features established in the project. Using technology, it will provide citizens and managers with a unique insight and integrated management of the information on the status of the services on the island. All managed through the SMART platform; this will be done by collecting, consuming, generating and processing data from the different services and activities.



The '**Smart Island Mallorca**' project was approved in the '1st Smart Islands' Call for Proposals' launched by the Spanish Ministry for Energy, Tourism and the Digital Agenda. It has a budget of 8,876,245.07 Euros fully funded by the Ministry of Energy, Tourism and the Digital Agenda, through Red.es. The objective of the '1st Smart Islands' Call for Proposals' is to promote projects that integrate a smart island strategy, contribute

"Smart Island Mallorca"

to improving public services, and mitigate the negative effects of insularity by using Information and Communication Technologies (ICTs). This strategy is part of the measures promoted by the Digital Agenda for Spain's National Plan for Smart Cities, approved in March 2015 and endowed with a budget of 188 million euros for the 2015-2017 time-frame.

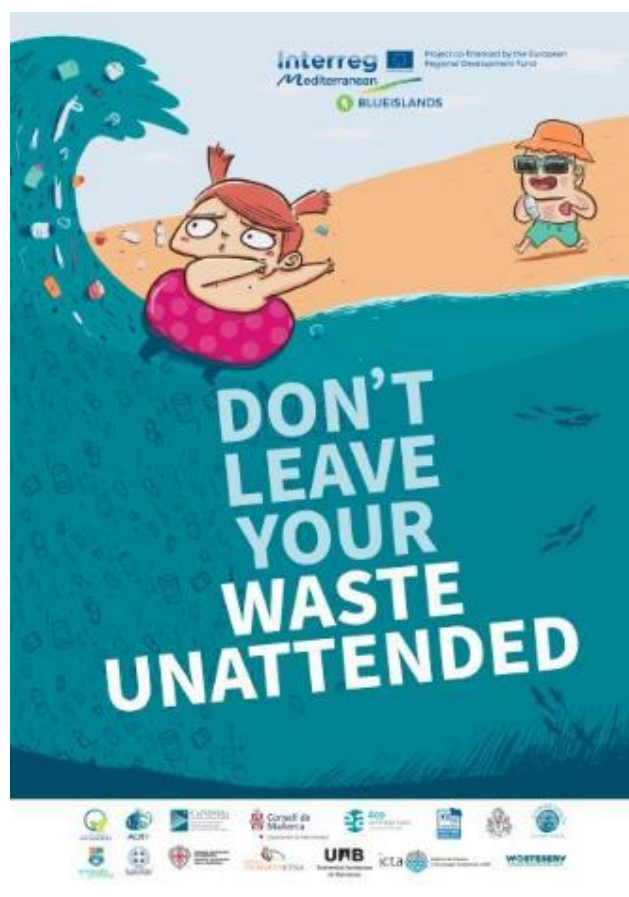
With tourism as the focal point of the Smart Island Mallorca initiative, the project is based on the potential of ICTs and also covers the areas of energy efficiency, resilience, mobility and accessibility. With the activities planned in Smart Island Mallorca, we intend to improve the standard of living of the island's citizens, revitalise tourism – to offer visitors better experiences and increase their impact on the local economy, make tourism less dependent on season factors by using its assets, affect the negative effects on insularity and support local organisations that, given their size, cannot obtain the necessary tools to boost themselves as an island asset.

With the 'Smart Island Mallorca' ("Smart OS") platform we intend to technologically supervise and manage the island in a whole to provide cross-cutting services to the multiple systems that are required in governance. The platform will monitor and control the island's entire ecosystem, including the services directly rendered by the Island Council as well as those provided by the island's town councils or external assignee companies.

4.2 Participation in European Projects

The Mallorca Island Council has taken part in (or is participating in) the following European projects directly or indirectly related to destination sustainability:

- **DESTI-SMART- INTERREG EUROPE⁴**. This project aims to improve and share the advances made in terms of making hiking routes more accessible.
- **CHERISH- INTERREG EUROPE⁵**. Project for the enhancement and recovery of maritime heritage in coastal towns with hiking routes.
- **MED EDUC- ERASMUS+⁶**. Project for the joint development of environmental education programmes related to maritime heritage.
- **MEDITERRANEAN BLUEISLAND⁷**. Mallorca's participation focuses on studying the seasonal variation of waste because of tourism.



Il·lustració 4 - Material gràfic del projecte BLUE ISLANDS

⁴ <https://www.interregeurope.eu/desti-smart/>

⁵ <https://www.interregeurope.eu/cherish/>

⁶ <https://web.conselldemallorca.cat/es/-/med-educ-erasmus->

⁷ <https://blueislands.interreg-med.eu/>



5 GEOGRAPHY, COMMUNITIES AND TOURISM

5.1 Description of Mallorca

5.1.1 Local identity

The island is well-structured territorially, entirely demarcated by its insular nature. Located in the heart of the Mediterranean, Mallorca merges the beauty of its land with the beauty of its sea, with landscapes full of contrasts. Shores lined with long sandy areas and typical Mediterranean coves. Inland areas dotted with historical agricultural villages, a historical legacy that goes back thousands of years and is influenced by Roman, Arab and Christian heritage. Mallorca's traditional cuisine uses produce from the sea and land and is one of the most deeply rooted socio-cultural features among the population. The island also has a full calendar of cultural events and festivities, and this is just another attraction in its excellent tourism offer.

Mallorca is the largest island in the Balearic archipelago. Together with Menorca, Ibiza and Formentera, it is a single-province autonomous community called 'Illes Balears', Spain's easternmost autonomous community. Mallorca has fifty-three municipalities that, apart from being subject to their own Councils are also subject to the island government, the Mallorca Island Council, that has different kinds of competencies in these municipalities. The capital of Mallorca and its autonomous community is Palma.



Mallorca has an approximate area of 363,570 hectares (72.93 per cent of the Balearic Islands' total area), making it the largest island in Spain and seventh largest in the Mediterranean. Its coastline stretches over 550Km with various types of beaches and coves.

With a population of 896,038 (IBESTAT 2019), it is the archipelago's most populated island and the second most populated in Spain. It is also the fourth most populated island in the Mediterranean.

With more than 29 million passenger movements at its airport (AENA 2019), for decades now, Mallorca has been one of the most popular European tourist destinations in the world since the tourism boom of the 70s. Decades of experience have resulted in a modern and wide range of accommodation: hotels, tourist apartments, holiday homes, rural hotels, agrotourisms, guesthouses, retreats and hostels. In total 301,000 beds⁸, 168,705 of which are hotel beds. There are all kinds of different category hotels, in different places and with different services. Modern city hotels, hotels near beaches, rural hotels and agrotourism properties in old "possessions" (rural estates), boutique hotels in Palma (some in centuries-old mansions) and small charming hotels in villages. This wide array of options makes it possible for people to choose accommodation according to their interests: family, children, total relaxation, wellbeing, sports, conferences, nature, accessible tourism, etc.

As a tourist destination, Mallorca was already an attractive destination in the 19th century. Famous is George Sand and Chopin's Winter in Mallorca; Archduke Luis Salvador of Austria purchased several properties in the *Serra de Tramuntana* mountain range area and revealed the ethnological heritage and culture of the island in his book *Die Balearen*, one of the first examples of tourism literature and a pioneer in tourism activity. Tourism has not ceased to grow on the island as evidenced by the Gran Hotel, Mallorca's hotel and tourism industry's first luxury hotel. Finished in 1903, it was the best and most luxurious hotel on the island, and until the Ritz Hotel opened in Madrid, it was the most luxurious hotel in the whole of Spain.

As a result of this great prosperity, *Fomento del Turismo de Mallorca* came to be. This non-profit organisation has been working to improve the island's tourism offer and promote the island in foreign markets since 1905. Over time, the Balearic Islands' Institute for Tourism Promotion (IBATUR for its acronym in Spanish) was created in 1989 by the Balearic Islands' Government's Regional Ministry of Tourism. This organisation's



Figure 5 – Mallorca's Serra de Tramuntana mountain range

objective is to attend and participate in different activities to promote tourism in the Balearic Islands and involve other public and private organisations in these activities, to join forces and support a standard tourism promotion policy for the Balearic Islands. The activities carried out by the Institute depend on the tourism

⁸ Data from AETIB, 2019.

market's demand: trade fairs, brochures, new generation initiatives, etc. In 2010 it merged with INESTUR, and both organisations became the Balearic Islands' Agency for Tourism (ATB for its acronym in Spanish). In 2018 all competencies related to tourism promotion were passed over to the Mallorca Island Council, STO applicant organisation.

The island's strong tourism sector which resulted from a drastic transformation several years ago can currently be identified as mass tourism, defined by a tourism system with most of its hotel beds in the "territorial triangle" formed by the districts of *Badia* (Bay of Palma), *Llevant* (East) and *Nord* (North). Eighty-eight per cent of the island's hotel beds can be found within this triangle.

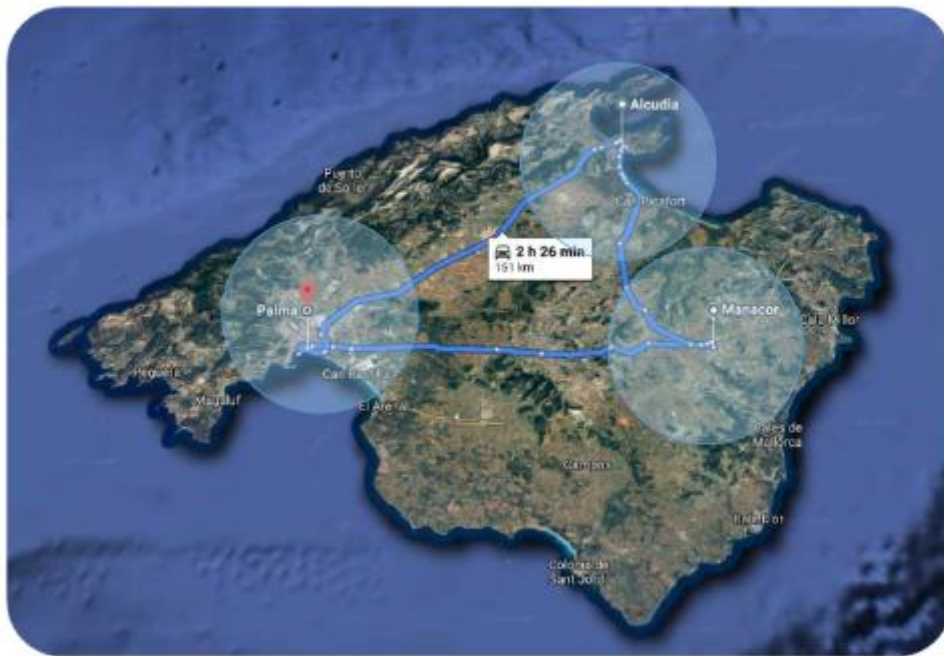
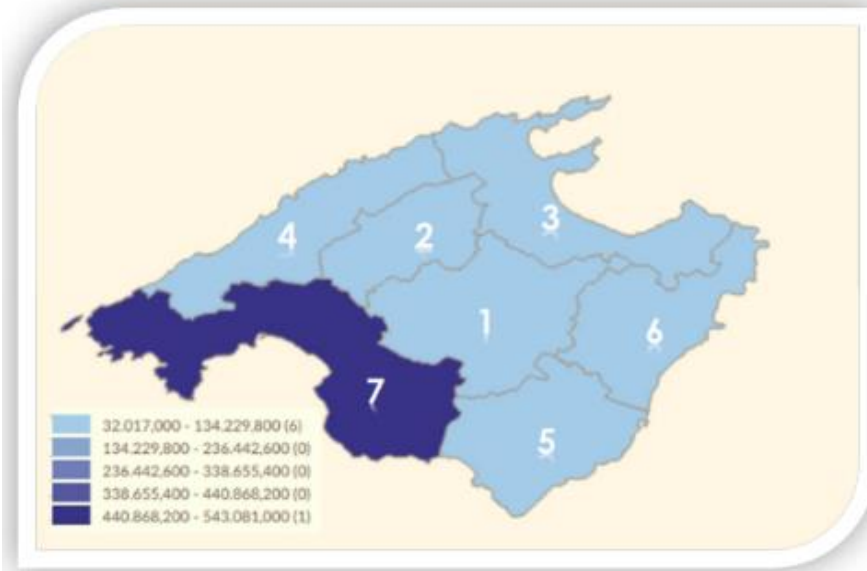


Figure 6 – Concentration of Mallorca's tourism offering

Region	Municipalities	Population Volume	
		2018 register	Foreign Population
1. Pla	Algaida, Ariany, Costitx, Lloret de Vistalegre, Llubí, María de la Salut, Montuïri, Petra, Porreres, Sant Joan, Santa Eugènia, Sencelles, Sineu, Villafrance de Bonany	32 255	5 605 (3,86% total Mallorca)
2. Raiguer	Alaró, Binissalem, Búger, Campanet, Consell, Inca, Lloseta, Mancor de la Vall, Santa Maria del Camí, Selva	2 082	9 175 (6,32%)
3. Nord	Alcúdia, Artà, Muro, Pollença, Sa Pobla, Santa Margalida	75 568	14 953 (10,30%)
4. Tramuntana	Banyalbufar, Bunyola, Deià, Escorca, Esporles, estellencs, Fornalutx, Puigpunyent, Sóller, Valldemossa	32 017	4 247 (2,93%)
5. Sud	Felanitx, Campos, Santanyí, Ses Salines	45 096	10 101 (696%)
6. Llevant	Capdepera, Manacor, Sant Lloren des Cardassar, Son Servera	74 014	14 006 (9,65%)
7. Badia	Palma, Andratx, Calvià, Lluçmajor, Marratxí	543 081	87 053 (59,98%)
TOTAL MALLORCA		880 113	145 140 (75,25% total Balearic Islands)

SOURCE: IBESTAT. Register of inhabitants. 2018 Yearbook



Tourism Offer

Region	No. of Establishments	No. of Beds	% of total Beds
1. Pla	<u>73</u>	<u>1 370</u>	<u>0.46%</u>
2. Raiguer	<u>60</u>	<u>1 259</u>	<u>0.42%</u>
3. Nord	<u>298</u>	<u>66 189</u>	<u>22.18%</u>
4. Tramuntana	<u>121</u>	<u>5 302</u>	<u>1.78%</u>
5. Sud	<u>237</u>	<u>27 814</u>	<u>9.32%</u>
6 Llevant	<u>357</u>	<u>71 500</u>	<u>23.96%</u>
7. Badia	<u>631</u>	<u>124 924</u>	<u>41.87%</u>
TOTAL	<u>1 777</u>	<u>298 358</u>	<u>100%</u>

Source: AETIB, 2019⁹

⁹ https://www.caib.es/sites/estadistiquesdelturisme/ca/allotjaments_turastics/

5.1.2 Cultural heritage

Mallorca, a land where cultures have been exchanged for centuries still preserves remains from Talaiotic, Phoenician, Roman and Arab times, and bears the mark of the Christian culture, heritage and ethnology, that in all give it today an impressive and varied cultural legacy, outlining beautiful villages and landscapes as well as works of art, heirs of centuries of tradition.

There are fifty-five archaeological, contemporary art, decorative arts and fine arts museums (including house museums) on the island. It also has two UNESCO declarations: the *Serra de Tramuntana* mountain range and the Sybil chant.

The Serra de Tramuntana mountain range was declared a world heritage site in 2011 (UNESCO, 27/06/2011) under the Cultural Landscape category for its Outstanding Universal Value drawing particular attention to the dry-stone structures and the waterworks. It is an international recognition of the almost perfect symbiosis between the works of human beings and nature, carried out over centuries, which has resulted in a monumental human-made endeavour where culture, traditions, aesthetics, spirituality and identity all come together.

The Serra's cultural landscape results from the exchange of knowledge between cultures, with small works carried out collectively for productive purposes, conditioned by the physical environment's limitations. Hurdles overcome based on wisdom and the intelligent use of resources, without destroying the environment. And it is also the recreation of a territory through the collective imagination and the works of artists who have found inspiration in it. The *Serra de Tramuntana Consortium*¹⁰ ensures the World heritage site is conserved, human impact is improved, and the Serra is promoted with sustainable activities meeting specific objectives.

La Sibil-la¹¹, **the Sybil**, a medieval chant sung during the Christmas mass. It is considered important because it is one of the few remaining examples of medieval religious folklore that has only survived in Mallorca and Alghero. This is why it was declared Heritage of Cultura Interest (*Bien de Interés Cultural*) by the Mallorca Island Council (10/12/2004) and an Intangible Cultural Heritage of Humanity by UNESCO (16/11/2010). It was one of the most popular medieval Christmas 'dramatisations' in mainland Spain, especially in Catalonia from where it arrived in Mallorca after Jaime I's conquest.



It should also be noted that several of Mallorca's towns are included in the list of "the most beautiful towns in Spain", highlighting among their main attractions that they still preserve a valuable architectural heritage. They are the following:

¹⁰ <https://www.serradetrantana.net/>

¹¹ <https://web.conselldemallorca.cat/es/la-sibila>

- *Fornalutx*. Located between the Puig Major massif, the highest peak in the Serra de Tramuntana mountain range, and the tourist town of Soller. It is a small town surrounded by olive, orange and lemon terraces, right in the heart of the mountain range and still shows painted tiles and bricks from the Arab period on the island, intertwined streets and stone houses that make it a very picturesque town.
- *Pollença*. A town full of stories in many places, among them *Cap de Formentor* (the Formentor peninsula). Its beach, scenic viewpoint and lighthouse have inspired many artists.
- *Alcúdia*. This town's history, geography and social dynamics are one of a kind. Here history is alive: the archaeological remains of the Roman city of Pollentia and its two Medieval and Renaissance walls make it especially attractive due to its historical features.



Picture 6 – View of the town of Fornalutx

On the other hand, in Mallorca, there are **more than 3,000 archaeological sites**, most of which have been declared "Heritage of Cultural Interest". Those that stand out for their research and discovery are Sa Galera, es Racons talaiots, Almallutx, ses Abelles, es Turassot, Son Real, Mestre Ramon, Na Nova and es Rossells. The settlements of Ses Païses in Artà and Caporcorb Vell in the municipality of Lluçmajor also stand out.



Figure 7 – Mallorcan Talaiots

It should be noted that the Mallorca Island Council has numerous projects underway to restore parts of Mallorca’s pre-industrial and industrial heritage, like the water extraction and flour windmills, the hydraulic mills, waterwheels, oil mills or salt mines, in the frame of the 2017-2020 **Historical Heritage Restoration Programme**, extended to 2022 (BOIB num. 127 of 17 October 2017 and BOIB num. 76 of 21 June 2018). It is also carrying out projects to restore coastal defence and watchtowers in the frame of **Mallorca’s 2017-2020 Programme for the conservation of its coastal warning, watch and defence system’s towers** (BOIB num. 44 of 13 April 2017 and BOIB num. 135 of 4 November 2017).



In both cases, the Mallorca Island Council, through the Insular Directorate for Heritage belonging to the Language Policy, Heritage and Culture Department is responsible for drafting the technical restoration project and managing and carrying out the work with its own in-house staff. While the owner, being either public or private, is responsible for providing the materials necessary to carry out the planned restoration project.

The call for grants to restore water extraction windmills in Palma’s Pla de Sant Jordi (BOIB num. 125 of 12 October 2017 y BOIB num. 82 of 20 June 2019) has also been published. In this case, the grant is financial aid to restore the buildings and the machinery, including these structures panning sites.

All of the initiatives mentioned above enhance the value of Mallorca’s historical heritage, while also contributing to sustainability because they use traditional materials and techniques to carry out the restoration work.

To improve and conserve Mallorca’s cultural heritage associated with hiking in the *Serra de Tramuntana* mountain range, the Mallorca Island Government has implemented several plans:

- Special Plan for the *Pedra en Sec* (dry stone) Trail
- Special Plan for the Artà-Lluc Trail
- Special Plan for the Lighthouse Trail (being processed)

The following initiatives are also “in the making”:

- The launch of a new hiking route called The Lighthouse Trail that connects two already existing trails (the *Pedra en Sec* and the Artà-Lluch Trails) enabling one to follow a perimeter route around Mallorca.
- The expansion of Mallorca Island Council’s mountain retreat circuit with two new retreats in Galatzó and Raixa.

- The opening of the closed sections of the *Pedra en Sec* and *Artà-Lluc* Trails now making it possible for both tourists and local hikers to follow the full trails enjoying the island's natural spaces and environment sustainably.
- The recovery of dry-stone ethnological features found along the Serra de Tramuntana mountain range.

5.1.3 Protected areas and environmental heritage

Mallorca has a rich biodiversity, and due to its insular nature, there are significant amounts of both flora and fauna endemic species. The Balearic Islands' Natura Network covers 222,424 hectares of land and sea (Source Natura Network).



Picture 8 – Red kite (Milvus milvus) in Mallorca

Currently, there are **ten natural spaces and monuments** in Mallorca. The Cabrera National Maritime and Land Park was the first to be given this designation in 1991. The island of Cabrera belongs to the municipality of Palma and has 90,794 hectares (covering 89,478 sea hectares and 1,316 land hectares – Source: CAIB).

Additionally, sixteen of Mallorca's municipalities have dozens of buildings that have received **SICTED (Integral System of Quality Tourism in Destinations) recognition**. This initiative is a methodology which provides a quality management system in the tourist destination; it acknowledges companies efforts and commitment to quality and continuous improvement and sets companies with the SICTED recognition apart from the competition.

The island also belongs to the **Natura 2000 Network**, the aim of which is to ensure the long-term survival of the European Union's natural habitat and represents the ecological diversity of all the countries that belong to it.

It has **eight Management Plans** underway and one being processed. Management plans are crucial to set out what measures need to be implemented in each area to assess the conservation status of natural resources and find out what funding is necessary to implement these measures.

The Natura 2000 network, with the declaration of Special Areas of Conservation (SACs), ensures the favourable conservation status or recovery of each habitat type and species throughout their range in the EU, guaranteeing their survival in the long-term and helping to safeguard and avoid the loss of biodiversity.

On the other hand, the Special Protection Areas for Birds (SPAs) ensure the protection, management, regulation and exploitation of all bird species that usually live in the wild in the European Member States where the Treaty is in force.

In 2020, the Department for Tourism and Sports announced the Sustainable Tourism Awards aimed at encouraging public and private organisations to carry out studies that will help put policies to promote quality and sustainable tourism into practice.

The purpose of this award is to commend the three best original and unpublished study projects on tourism that put the Agenda 2030's sustainable development goals into practice, especially those closely related to tourism such as:

- Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all (SDG 8)
- Ensure Responsible Consumption and Production (SDG 12)
- Life Below Water – Preserve and use oceans, the sea and marine resources sustainably (SDG 14)

Coastal and maritime tourism, the largest tourism segment, especially for Small Island Developing States (SIDS), depends on healthy marine ecosystems and must be a part of an integrated ordinance for coastal areas to help conserve and preserve fragile ecosystems and drive the promotion of a blue economy.

The approval of the first **Balearic Islands' Law on contaminated soil and waste** (Law 8/2019 of 19 February) represents a turning point in the Balearic Islands' community's relationship with the environment. The ample amount of measures adopted present the tourism sector with a new scenario that calls for in-depth adaptation measures aimed at circular economy based on sustainability, cleaner production, extended producer responsibility and zero-waste.

The changes that promote restructuring the production system towards cleaner production and ecological farming and livestock need to be urgently and firmly implemented to achieve this paradigm shift.

Priority aspects concerning tourism that stand out are:

- The development and definition of legal regulations for an effective reduction of food waste in hotels and restaurants, among others, promoting a social pact to reduce waste.
- The development of tools and resources that make recycling easier, promoting reusable containers, unpacked products, and durable goods and services as measures to reduce waste.

Within the framework to boost an RDI policy to prevent waste:

- Lessen the impact on health and the environment
- Replace high impact and non-renewable materials
- Materials cycle closure
- Low-carbon and energy economy

In February 2020, the Mallorca Island Council's Environment Department hosted a Conference on Sustainable Tourism, and the conclusions of the **MedBLUEISLANDS**¹² project were one of the conference's talking points. MedBLUEISLANDS is a European cooperation and communication project that Mallorca is a partner in, and over the last three years, it has been studying the connection between tourism flows and the increase in waste on different beaches on nine Mediterranean islands.

The Department for Tourism and Sports and the Department for Sustainability and Environment have promoted the work carried out by the "**Seabin Project**"¹³ aimed at reducing plastics in the marine environment, by presenting it to the island's councillors from coastal areas.

The Mallorca Island Council's Sustainability and Environment Department is also a partner in the European **MED Educ-Erasmus+**¹⁴ project. This project aims to create environmental education resources focused on discovering the Mediterranean's marine and coastal environment.

5.1.4 Waste Management

Mallorca has a Sectoral Master Plan for Non-Hazardous Waste which includes several composting plants and a packaging plant. These waste management and prevention facilities will contribute to the fulfilment of the waste reduction and better selection goals foreseen in Law 8/2019 of 19 February concerning contaminated soil and waste in the Balearic Islands and in Mallorca's SMP's strategic lines for the management of non-hazardous waste.

A call to encourage Circular Economy initiatives that will effectively reduce waste generation is planned for 2021.



¹² <https://blueislands.interreg-med.eu/>

¹³ <https://seabinproject.com/>

¹⁴ <https://web.conselldemallorca.cat/es/-/med-educ-erasmus->

5.1.5 Safety and Security in the Destination

Tourist destinations need to guarantee safety and security to ensure sustainability. Mallorca has different police, security... forces and action plans that guarantee safety on the island for both tourists and residents.

5.1.5.1 Safety on beaches

Beaches are Mallorca's main leisure attraction. They are everchanging, alive and dynamic places that are always open. Therefore, it is crucial to make sure beaches themselves, and beach activities are safe.

There are vast amounts of regulations that legislate and define the destination's status and view on safety. Sufficient statistical information and data are also available and collected to help reinvent and adapt the implemented measures. Autonomic Law 2/2005 concerning safety on beaches is in force, and it was the first of its kind in all of Spain. It includes a rescue plan, a classification of risks, emergency procedures, estimations of the necessary human resources, simulations etc. that make it easier to operate and improve services. Furthermore, Decree 27/2015 reviews the rescue plan, everything concerning beach flags, the 'SOS REACTIU' team, timetables, etc. And, most importantly, it includes technical instructions that develop the decrees.

Mallorca's beaches have the following facilities: marked towers, care centres, beach beacons, communications services, heliports and lifeguard services, SPS Rescue teams that use jet skis, quads, rapid intervention vehicles, defibrillators, rescue kayaks and boards, etc.

Another key aspect is the SPS teams' training with multiple interventions and a special focus on drills. Several Safety and Security Programmes have also been defined:

- PSID (children, don't get lost)
- Colour protection areas; red representing those most dangerous and green those less dangerous
- Markings/ribbons to identify locations when asking for information/help
- Red distress dots

In addition to the above, several External Services have also been set up like the Water Police Squad in Muro, UPAM, to help maintain public order on beaches, surveillance drones and capacity control systems, and health services with SOCIB (jellyfish, currents), and the assisted bathing service for people with disabilities. There is complete statistical information on these services, and it is classified by nationalities, gender, age groups and the time care was provided. By the end of 2020, 516 interventions and call outs, 496 people attended. Call-outs 2319, a total 2835 this year. In 2019: 1374 people attended and 1564 call-outs.

2020 saw a significant number of call-outs related to COVID-19. A specific COVID-19 protocol called DAHO - for its acronym in Spanish- meaning Social Distancing, Capacity, Hygiene and Others- has also been launched. Protocols with companies and seasonal concessionaires have also been set up, awarding them with the SAFE TOURISM CERTIFIED certification.

5.1.5.2 Local Police Forces

The Local Police forces are neighbourhood police, and Tourist Police are more of a concept than an organisational unit of how to work with tourists. Police are typically called out for rapid interventions, to maintain public order and investigate. Tourists are part of the island's population even though they come from other countries.

Police work is based on three timeframes: before, now and after (prevention, intervention and monitoring). Until now, more time has been put into the NOW, and the AFTER, and yet, preventive police work is essential for sustainable tourism. This requires strategic planning and being able to define the deployment of resources, consequently:

- Police information agent (how much tourism, where from, typical needs and requirements, to be ready)
- Citizen guidance on the deployment
- Gender, race, beliefs, age diversity and perspective
- Micro spaces (streets, hotspots, beach areas or museums)
- Joint production (tourism sector organisations and neighbourhood participation)
- Systematic transparency (data on how we are doing, and how we can use this data to relate it to tourism)
- use of science and technology (segmentation of police work to create a greater impact)

5.1.5.3 Mallorca Firefighters

The Mallorca Firefighters' department covers the whole of Mallorca except for the municipality of Palma that has its own fire department. This fire department was created in 1968 due to the Law concerning Forest Fires coming into force. In 1980 the island's first fire stations' network was set up, and in 2000 the mountain rescue team was formed. The Mallorca Firefighters department currently has fire stations in Calvià, Inca, Manacor, Andratx, Alcudia, Artà, Felanitx, Lluçmajor, Santa Margalida and Soller.

The Fire department's organisation is as follows:

- Prevention (occupational risks and residents) and training
- Facilities and equipment
- Planning and operations department

The fire department has grown due to the increasing number of call-outs: fires in hotels and public buildings, mountain rescues (same amount as in Lleida), traffic accidents and all kinds of other accidents. Callouts are organised depending on the type of accident; calls come through the 112 emergency number where all the relevant information and data is recorded, and summarised activity infographics are generated.

Regarding the number of firefighters, Mallorca has one firefighter for every 1,900 residents (the UE recommends one for every 1,000). The short-term goal is to have one for every 1,600.

Due to COVID-19 that has led to people visiting open spaces a lot more, the number of rescues related to canyoning, psicobloc (there are daily rescues at Cala Barcas, with people falling more than twelve meters into the water), rock climbing and beach trekking has increased a great deal. Spring and autumn are when most rescues are carried out.

Legally there are enough regulations, but a special emergency plan is still lacking, as well as permanent aircraft support for rescues.

Mallorca Firefighters highlight the need to increase prevention measures when it comes to tourists and give them more information about the mountains and outdoor/nature sports.

5.1.5.4 The Balearic Islands' Civil Protection Units

The Balearic Islands' civil protection units are part of the national civil protection system (art.17 emergency intervention and assistance services). It is a completely regulated sector, and its goal and mission are to defend human life, goods and the natural environment.

The civil protection services work with citizens in the event of a catastrophe or in situations that could harm public safety. The number of residents plus the number of hotel beds is the indicator that defines when a town council needs to use civil protection services (organisation, written civil protection plan, a database of resources and their cataloguing, control, sanction and beach safety).

Several different state/autonomic/local and special plans are set out for self-protection and to prepare for immediate action in the case of emergencies. The action plan implies a change of authority to determine immediate interventions when managing emergencies.

Mallorca has many different Civil Protection action plans:

- PLATERBAL (regional plan)
- INFOBAL (for fires)
- INUNBAL (for floods, 79 deaths, 77 in Mallorca in the last forty years)
- METEOBAL (weather phenomena)
- GEOBAL (seismic risk)
- MERPEBAL (hazardous materials)
- Chemical sector emergency Plan
- CAMBAL (contamination of groundwater)
- Radiological Plan (in preparation)
- Plan for aircraft accidents (in preparation, currently a standard protocol)

5.1.5.5 Cybersecurity Police Squad, CNPOL

Cybersecurity is gaining more and more relevance, both locally and globally, because cyberattacks see no borders. They are becoming more frequent, more organised and more adapted to their different types of victims.

Its perpetrators are code-writers, code executors, after the attack data collectors, recipients of the funds/assets obtained and the launderers (crypto coins, accounts outside of the EU).

Police have to be up to date with everything. Even most teenagers these days know how to attack computers, do phishing, etc. 98% per cent of Spanish companies do not believe they could be possible targets of these attacks. Despite this, 84 per cent are going to increase their budget for cybersecurity by ten per cent.

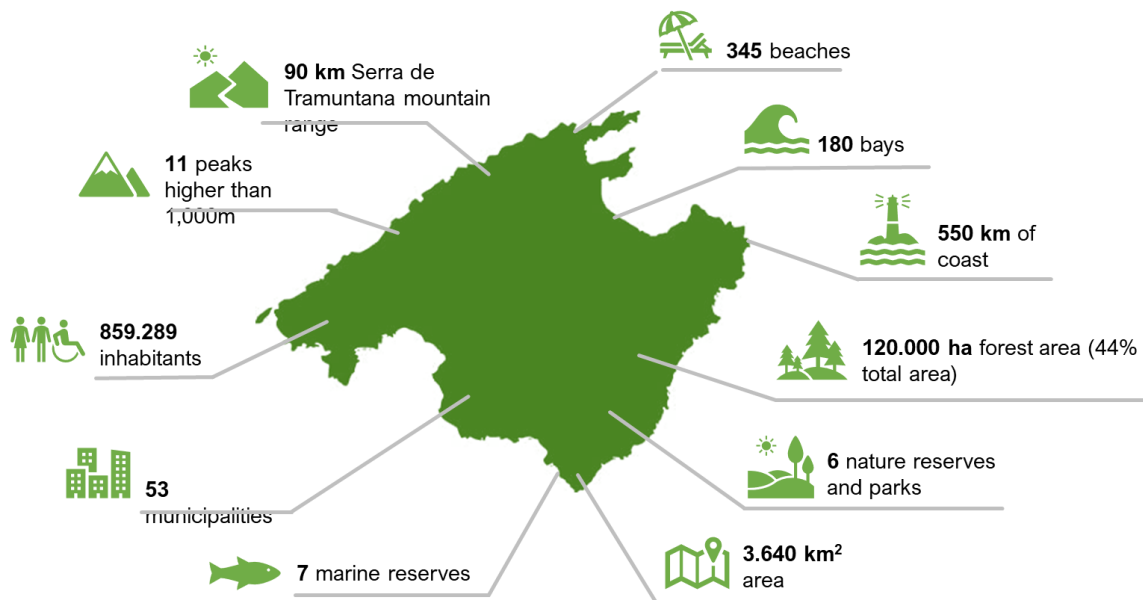
For example, in 2018, the *Wanacry attack* affected more than 300,000 computers in 150 different countries with over 3,500 million euros in damages. This virus is still around adapting and infecting new users.

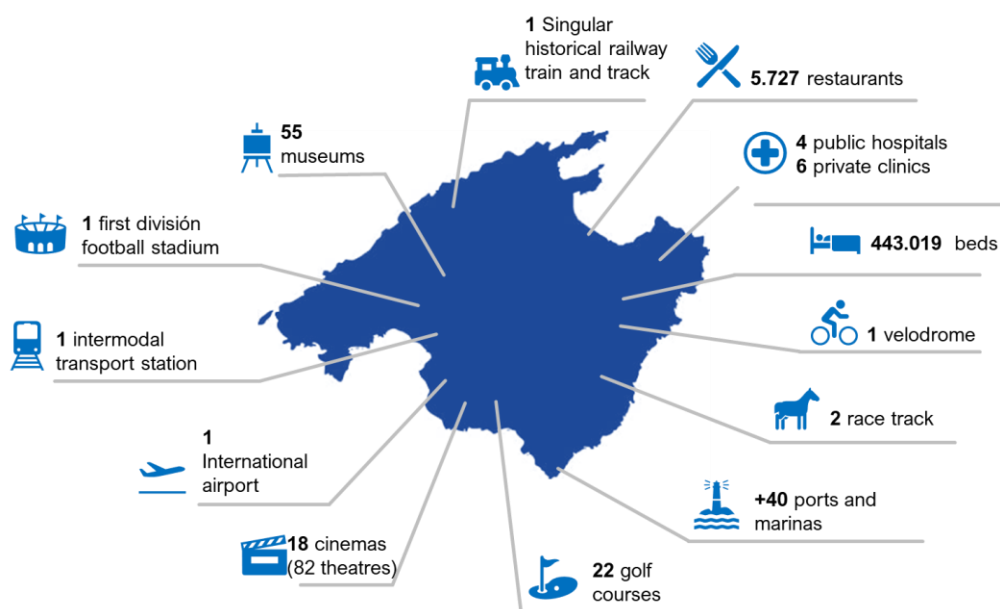
During the first quarter of 2020, cyberattacks increased by 125 per cent, especially affecting the tourism sector. At the moment, losses are estimated at 40 million euros.

CNPOL has a specific cybercrime programme: attacks, scams, spoofing, child pornography, etc. It has also implemented a **“Safe Tourism Plan”**, to permanently increase internet safety and security in tourist areas by giving advice to tourists (warning them about hotel WiFis, contactless technology, not giving their card numbers, etc.). Work is being carried out with hotel chains, and tourist sector companies setting up advanced cybersecurity resources.

Tourists themselves are already taking safety measures, and many of them travel with virtual bitcoin wallets to avoid thefts.

5.1.6 The island in numbers





5.1.7 Mallorca's Tourism Products

The island is internationally known for its beach tourism and other tourist products that are associated with the island like its territorial, climatological, historical and cultural features.

A product that has been gaining moment in recent years is tourism related to film shooting and audiovisual productions. The Mallorca Island Council promotes this kind of tourism through the *Mallorca Film Commission* (MFC), as explained in chapter 4.

MFC offers services throughout the island of Mallorca, and its main objectives are to:

- Open the doors to professionals and companies for the shooting of audiovisual productions.
- Inspire and consolidate the Mallorcan audiovisual industry.
- Promote co-productions and internationalisation by attending markets, festivals and specialised shows and trade fairs.

MFC offers film producers and media companies remarkable places for filming and responsible use of its landscapes and sceneries to promote the island. A handy tool to get to know these locations is the 'Mallorca Movie Map', that shows five different spectacular location routes.

More information about Mallorca as a tourist destination for filming can be found on the following webs:

- Filmed in Mallorca: <https://mallorcafilmcommission.net/es/rodat-a-mallorca/>
- Link to the island's graphic marketing material: <https://mallorcafilmcommission.net/en/grafics-descargables/>

Below are some examples of Mallorca's Product Clubs (STS)¹⁵

5.1.7.1 Active tourism

Another of the island's priority products is active tourism, highlighting its great attraction for hiking, Nordic Walking, golf and nautical activities. Mallorca has a great diversity of landscapes for all kinds of hiking; from the Serra de Tramuntana mountain range with over 1,000-meter-high peaks to the Serra de Llevant with mountains standing at around 500 meters, as well as the Pla (plain) and coastal areas that also offer a range of stunning hiking trails. The nature parks and public estates also have signposted routes and tracks to enjoy hiking.

Hiking is a prevalent activity in Mallorca because Mallorca's countryside is a world of light, sensations and exciting experiences. There are hordes of trails and paths that run through forests, skirt steep cliffs or look out over mountain torrents, waiting to be discovered and enjoyed by curious, observant and nature-loving visitors. Of all the trails, the most popular is the GR-221 Long-Distance Trail, known as the *Ruta de Pedra en Sec* (Dry-Stone Trail) that mostly runs through the Serra de Tramuntana mountain range. It should also be noted that the first Nordic Walking park in Spain is in Mallorca, specifically in Alcudia.



5.1.7.2 Sports Tourism

Mallorca is the world's number one destination for **cycle tourism**. Good weather every day, every week, every month, every year. Postcard landscapes bordering the sea, crossing through charming villages, meadows, the imposing *Serra de Tramuntana* mountain range... and service. Anything you can imagine for cyclists. Mallorca also hosts different cycling competitions primarily held during the low-season (Photo: Challenge Calvià).



Golf is also one of Mallorca's tourists and residents' favourite sports. So much so that the growing demand for this sport has led to new and better facilities being offered on the island in recent years. Always located in stunning settings, Mallorca's golf courses arouse the fascination of everyone who tries them, which is why most decide to come back at least once every year. In total, there are 23 golf courses on the island.

¹⁵ Information from AETIB: <https://www.illesbalears.travel/en/baleares/>

Mallorca also has worldwide recognition for its **nautical competitions**, that are held every summer on its coasts. Crowds of public figures like the Spanish Royal family come to the island to actively participate in regattas held on the island throughout the year. Among the many regattas organised in the Balearic Islands, the most important one is the *Copa del Rey de Vela* competition (the King's Cup Sailing Competition) held in the waters of the Bay of Palma de Mallorca. It is one of the most important sailing boat regattas in all the Mediterranean, becoming a major event in international calendars.



Active visitors can do all sorts of sports because, being an island, sport can be done on land, sea, and in the air. There is a great tradition for all kinds of different sports on Mallorca, Beach volleyball tournaments with internationally well-known players, football, tennis, sailing, hockey, cycling, athletics, swimming, etc.

5.1.7.3 Gastronomy Tourism

Food is a fundamental part of Mallorca's culture. The island treasures a great diversity of exquisite first quality products: olive oil, ensaimada (a typical sweet pastry), sobrasada (raw, cured sausage from the Balearic Islands made from ground pork, paprika and salt), cheese, wine, herbs, sea salt, etc. All of these products are linked to the land, its roots and the characteristics of the island that have given it a seal of identity-based on authenticity, quality and tradition.



5.1.7.4 Luxury Tourism



The new luxury is simplicity. The new luxury is authenticity. The new luxury cannot be touched; it is lived and felt. The new luxury is immaterial; it is to live and feel experiences. The new luxury is enjoying simplicity and wellbeing, a slow life, slow food, slow travel. For this, you need the best possible infrastructures and facilities in a unique setting, suitable for a spiritual retreat.

In this sense, we find from the conservation of its essence and traditions, a simple and authentic way of life (the life of peasants), a Mediterranean and Alpine Mallorca, with

turquoise coves and beaches, and its *Serra de Tramuntana* mountain range. Nine Michelin-Starred restaurants and much much more.

5.1.7.5 Health and Wellness Tourism

Mallorca, one of the world's leading tourist destinations, offers you modern facilities, advanced methods and treatments, state-of-the-art medical technology and first-class professionals in the health and wellness area combined with a beautiful environment, an agreeable climate throughout the year and food based on the Mediterranean diet. All of this makes it the perfect place to recover and relax.



5.1.7.6 Cultural Tourism

Mallorca, an island, a dream, a shelter cut off from the mainland, surrounded by a living and vibrant sea, where a society, a genuine landscape, and a peculiar culture, like the chant of the Sibyl, have been created.



Woven of large areas of dry-stone walls, the stones speak of talaíots and necropolis by the sea. On its land grows heady basil that the *cossiers* shake in their dances and wheat that feeds the animals of Sant Antoni (Saint Anthony). Trees that inspire artists and scented gardens. The light it gives off is the sun of Miró; it is the same light that enchants us inside the Cathedral, so experienced by Gaudí and reinterpreted by Barceló. This light was sought by the Archduke tracing the Serra de Tramuntana mountain range, on the road that will

lead us to live legends and festivals of pirates and privateers, invaders and knights, fire watchmen and rock castles, true witnesses in stone of the stories the island has lived and where precisely calmness is not reflected. Only Chopin's notes and Lull's reflections bring peace and the way of a quiet life in Mallorca's busy calendar, so marked by traditions.

5.1.7.7 Ecotourism

If there is a place where you can enjoy nature in all of its splendour, that is Mallorca. A paradise of indescribable beauty where parks and natural monuments, shores with crystal clear waters, and biodiversity like no other, draw an unforgettable picture for lovers of nature and outdoor activities.

Birdwatching: the wide range of different birds, make Mallorca the perfect place for birdwatching. Many birds visit us every year without missing their appointment. You will be able to enjoy watching them in unique natural spaces like the Albufera Natural Park or the Serra de Tramuntana mountain range.



5.1.7.8 MICE Tourism



Mallorca is an ideal setting for an unforgettable event. Here you will find everything you need to make any event one-of-a-kind and exclusive. A wide network of companies and professionals specialised in MICE services, an extensive hotel and restaurant offering, excellent connectivity with the rest of Europe, cultural and leisure activities.... And when you add the island's incomparable setting, you get the perfect combo to ensure any event's success.

5.1.8 Examples of private sector offering committed to sustainable tourism

Sustainability is associated with safeguarding traditions by offering authentic experiences showing that this type of tourism ensures the upkeep of physical and intangible aspects. For this reason, rural (agriculture) and historical heritage play a key role, and if we also offer Km0 products, then the experience is complete.

Private initiatives that promote sustainable tourism are some of the following:

- <https://mallorca-autentica.com/> Run by the German market, his website includes local activities based on sustainability and Km0 (local) products.
- <https://www.mallorcamuntanya.com/> This website targets German tourists and shows them different outings they can go on around the Serra Tramuntana mountain range.
- <http://www.cooperativasoller.com/index.php/36-principal/126-capvespre> The Agricultural Cooperative of Soller offers workshops and different training sessions. The Cooperative's philosophy is for the orange and olive groves to be worked on following sustainability criteria, help those in charge of looking after the Serra de Tramuntana's resources, promote the sale of good quality fresh products for crops to survive, help preserve and protect the natural environment and save resources.
- <https://www.ecovinyassa.com/es/> Ecovinyassa is an estate involved in environmental education where tourists and visitors can learn about the history behind Soller's oranges and enjoy the peace and quiet and a very special microclimate while tasting freshly squeezed ecological orange juice and a typical small snack.


- <https://terragust.com/> The Terragust project was created to promote sustainability, knowledge of local products and circular economy. They offer culinary experiences based on Km0 (local) products showing you don't have to go far to get the best flavours and textures. Thus, this web offers guided tours around Mallorca's crops and also sells Mallorcan elaborated gourmet products, fruit and vegetables. Terragust has a sustainability plan and uses sustainable agricultural techniques like integrated production. They are implementing Short food circuits (from producer to consumer) that contribute to the island's circular economy. They have stopped using traditional plastics and are working on cutting down water consumption.



Picture 9 – Local culinary experience, Terragust

- <https://terracor.es/> Terracor grows and commercialises fruit and vegetable from Mallorca. They have put a great effort into recovering traditional varieties, and they focus on protecting the environment.
- <https://fundacion-itinerem.org> The Itinerem Foundation was established in 2018 and inherited the work carried out by the Mediterranean Historical Heritage Cultural Association since 2015. Its board comprises a group of professionals from the tourism, cultural and media and communication sectors. Its goals are to design, promote and carry out different kinds of activities to promote and tell people about Mallorca's "Possessions" (historical rural manor houses) and other features of Mediterranean heritage, encouraging owners to get involved with local development and cultural tourism. The Foundation also participates in the local community's growth by signing cooperation agreements with other associations, educational institutions, town councils and professional and business groups to identify and meet common goals.
- <https://www.artifexbalear.org> BalearsVerd is a project to regenerate the Balearic Islands' land and sea ecosystems using Regenerative Agriculture and recovering the *Posidonia oceanica* meadows. Its clear objectives are:
 - Land regeneration: increase organic matter by 4 per cent (three years)
 - Double the water retention capacity (one year)
 - Reduce the temperature of the land by 5°C (one year)
 - Produce 1 Ton of fungal compound (six months)
 - Produce 100L of bio-fertilisers (six months)
 - Greening activities (green roof)
 - Plant and area of 100m² with trees that have a 90 per cent survival rate in their 3rd year (Food Forest Gardens)
 - Seedbeds adapted to climate change. 1,000 units of *Posidonia* seedbeds in greenhouses (Imedea)
 - Plant *Posidonia Oceanica* in the sea (Imedea)

- Urban agriculture and eco-literacy
 - 1000m² Innovation centres
 - 100 m² shaded/urban gardens
 - 10 m² cultivation tables for urban agriculture
 - 50 m² green roofs and vertical gardens

- www.mallorcawalkingevent.com The Mallorca Walking Event (MWE) has been held on Mallorca for the last five years. It is a non-competitive event where mostly Dutch people walk for four days. The event is to help make tourism less dependant on seasonal factors and is organised before Easter. This event is very popular with pensioners who seize the opportunity and spend a week on the island getting to know it in a sustainable way. MWE implements sustainable initiatives like giving reusable water bottles with the registration to eliminate the use of plastic during the event.
 

- www.vinsnadal.es Vins Nadal is a small family vineyard that has been working for many years now to protect nature and the environment. Its philosophy and objectives are to:
 - Protect the environment
 - Become a member of the Business and Climate Foundation to help mitigate climate change. Carbon Footprint analysis and yearly improvements.
 - Only use lightweight bottles for their wines
 - Exclusively use natural cork
 - Thirteen percent fewer emissions
 - Make labels out of calcium carbonate
 - Not use herbicides
 - Only use antifungal products that do not leave residues
 - Be a certified Zero-waste company as it is. It complies with the requirements set out in EU regulations concerning the maximum amount of residues of phytosanitary products allowed in wines and makes sure that when present, they are those permitted in this regulation. At the same time, they also use products that leave no waste or residues when treating vineyards.

- <https://pescaturismomallorca.com/>
 PescaTurismo (Fishing trip) won the award for Best international initiative in responsible and sustainable tourism at FITUR in 2018 and the Best Balearic Islands' tourist experience award granted by the Government of the Balearic Islands also in 2018. PescaTurismo together with the island's fishermen's associations and individual fishermen sell trips for people to go out with traditional fishermen on professional fishing boats and spend a typical working day with them fishing. These trips can be organised all year round, and their goal is to promote ecotourism and maritime culture.



- <https://tirolinasgo.com/> The zip lines Tirolinas Go adventure park is in the countryside and is built out of wood. It is 100 per cent sustainable and produces Zero pollution. It promotes outdoor Sports and leisure activities for children, young people, adults, families, etc. The park has a programme for tree planting that it carries out with schools on the island. In 2019 every school that came to the park planted a tree in the park's forest.

- <https://www.cleanwave.org/> Cleanwave is a non-profit initiative that fights against single-use plastic and offers a sustainable alternative to single-use disposable bottles in the Balearic Islands. Cleanwave aims to make drinking water freely accessible while also reducing plastic waste by selling stainless steel bottles.



- <http://clean-boating.com/index.html> The Clean Boating Movement is a joint private-public partnership that aims to reduce the amount of plastic litter in our Seas by targeting and involving the pleasure boating community and the many charter vessels around the island of Mallorca, to get involved and play a vital role of picking up and removing plastic from the sea. It was initiated in Autumn 2020 in Cala Dor, Mallorca, through a collaboration between Sea Teach Sea School, the Santanyí town council, Cala d'Or tourism offices, Holls Charter, and other local businesses.

It should also be noted that the island's leading hotel chains are highly committed to sustainable and responsible tourism. They all have corporate responsibility and sustainability statements, including specific measures to protect and conserve the destination's resources. And they all use Smart technologies to improve how the effects generated are managed and make decision-making a lot easier and quicker. They are also starting to install more energy-efficient appliances aimed at continually reducing their dependency on fossil fuels.

For example, **Riu Hotels & Resorts** invested 1.2 million euros in social and environmental protection projects in 2019; **Iberostar** launched the *Wave of Change* movement to eliminate plastic, promote responsible consumption of fish and reduce coastal pollution; **Barceló** group has set up *Responsible Living Hotels* that implements fifty-five measures related to energy efficiency, responsible consumption, the elimination of single-use plastics, waste management, new uniforms made out of recycled fabric, environmental value enhancement and contribution to the local economy, as well as raising the awareness and commitment of its teams and customers. And **Meliá Hotels International** that in 2019 was crowned world's most sustainable hotel company thanks to its ecological, water and energy management projects, as well as its commitment in meeting the SDGs.

The hotels belonging to **Alcudia's Hotel Association** have implemented the following initiatives:

- **Elimination of plastic bottles.** 0.5-litre plastic water bottles are replaced by cardboard cups, installing purified water fountains and replacing courtesy plastic water bottlers for reusable glass ones.
- **Commitment to local Zero-Km products.** Local and ecological products are incorporated into their culinary offering to boost the local economy.
- **Participation in FEHM's circular economy strategy** – Impulsa Foundation: Adherence to the circular economy strategy promoted by Fundación Impulsa Baleares, together with several hotel chains to move forward in reducing the use of resources and increasing recycling.
- **Biomass.** Installation of biomass boilers in several hotels to reduce the use of diesel and piped gas, thereby contributing to reducing their carbon footprints.
- **Environmental Certifications.** Application of ISO14001 environmental management systems and EMS verification.
- **Paperless employee website.** Digitisation of the HR department and the creation of a website for employees, substantially reducing paper waste.
- **Cooperation with social entities and NGOs.** Perishable food donations to the Food Bank because of hotels being closed down due to COVID-19. Fundraising for *Sonrisa Médica* (a non-profit ClownCare organisation), 15,000€ in 2020. Donation of sheets, quilts, blankets, towels, etc. and household items to "*Los Amigos de Buba*", an association that helps children and women in Senegal.

Many hotels carry out their own initiatives, like **Hotel Bonsol**, that has been planting trees to offset CO₂-emissions since 2007. These trees are planted in Costa Rica on land where trees were cut down in the fifties to plant pastures for cattle. The forest area is recovered and jobs are created. Since the launch of the project, more than 200,000 trees have been planted.

Together with the Association of Local Varieties (www.varietatslocals.org), **Hotel Son Brull** has implemented a **programme for the recovery of local varieties of vegetables, legumes, cereals and fruit seeds**, as well as the relevant farming knowledge. This initiative encourages the production and conservation of the cultivated biodiversity and the collective management of agrobiodiversity as the people's heritage. The hotel has also set up water recycling systems, solar panels, biomass boilers and electric car chargers. Finally, it is also a member of the Relais & Chateaux association and is fully committed to the **Relais & Chateaux manifest**¹⁶ presented to WHO in 2014.

¹⁶ <https://www.relaischateaux.com/es/p/manifeste>

The **Viva Hotels & Resorts** hotel chain carries numerous measures to improve energy consumption, waste management, mobility and responsible consumption at all its hotels: from investing in solar energy and electric vehicles to eliminating all single-use plastic and becoming a part of TIRME's circular hotels' project.

Another project, not directly related to sustainability, but considered one of the island's best practices is the **HI Services** project promoted by Health Innovation Services. The project puts innovation and technology at the service of people's health. The company has set up HI-Points (Health Innovation Points), completely adaptable wooden structures, in different places on the island. HIScreens, tactile and interactive digital screens where people (residents and tourists) will find information and tips on healthy living and how to act in the case of an emergency, are set up inside the HI-Points. One of their top features is an innovative software that recommends what sunscreen each person should use and how to use it. This project has the support of the **Spanish Association against Cancer** and the **112** emergency service.




Picture 10 - HI Point for the promotion of e-Health services

5.1.9. Examples of public sector offering committed to sustainable tourism

Local authorities play a critical role in the movement towards sustainable tourism, because being closer to citizens and more sensitive to the interests of the locals, they are responsible for promoting citizen participation and reaching agreements on sustainable policies, such as encouraging integrated tourism in opposition to the standardisation of mass tourism. Local administrations are also responsible for promoting local resources and products avoiding 'foreign' products being introduced into tourist areas; encouraging quality improvement measures in tourist facilities; introducing sustainable criteria in product management and urban planning to adapt the offering and help make tourism less dependant on the high season creating complementary products that diversify the tourist offer.

There are hordes of public projects and initiatives carried out in the island's different towns to improve sustainability on the island. Here are just a few:

- **Palma City Council.** Member of the DTI Network, this council implements relevant, sustainable tourism projects:
 - Management of tourism flows. The "Welcome Palma" project. This project works with WiFi Heatmaps and chatbots that redirect tourism flows to the city's different attractions. With suggestions to avoid overcrowding and reactivate other tourism sites. 
 - Dissuasive stops for discretionary transport, avoiding overcrowding, reducing pollution in the city's critical spots, as well as promoting less-known neighbourhoods.

- **Safe beaches.** App created during the COVID-19 pandemic that is also being used by other towns. This App helps to control beach capacity.
- **Incercle.** A circular economy project used for organic waste collection from hotels. Compost is made from this waste and then used by the hotels. With this project, local and slow food is promoted and CO2 emissions drop.
- **Green Spaces.** Areas to enjoy the city, the urban way to offer tourists other options.



- **Calvià Town Council.** Also a member of the DTI network and chairs of its executive board. Also working on its Smart Destination project funded by Red.es. Other sustainable tourism initiatives:

- Beach management plan. Fifteen of its beaches have UNE-ISO 13.9:2016 certifications, making it the Spanish municipality with most Q for "Quality" flags.
- Seventy per cent of Calvià's land is protected, and the municipality has now taken a further step to protect its seabed by launching the "Posidonia" project to preserve the *Posidonia oceanica*.
- Activities that link tourism to environmental protection like SwimRun
- Challenge Peguera Mallorca Triathlon, where more than forty measures to reduce waste, raise awareness, etc. have been set up.
- Mallorca Life Festival, the combination of a social and economic impact event, where important environmental measures like sustainable consuming, efficient water use, waste reduction or carbon footprint studies have been put implemented.



- **Pollença Town Council.** The council is promoting the following initiatives:
 - Use of Smart Technology in Pollença's environmental, cultural and tourist signage.
 - Reduction of emissions and mobility planning: sustainability, reduce the impact on the environment, implement an integrated urban mobility development model.
 - The design and development of a tourist marketing plan
 - Improve the quality of the water in Puerto de Pollença's bay and protect the maritime ecosystem.
 - A project to promote energy renovations in the hotel sector. Boost innovation in technology to contribute to a smarter and more sustainable use of energy. Promote more intelligent energy consumption.
 - A project to boost the digitisation and digital transformation of the hotel sector.

- **Andratx Town Council.** The Council is promoting the following initiatives:

 - A significant investment in reusable bottles with the creation and distribution of reusable stainless steel bottles. General waste bins have been replaced for recycling bins for glass, cardboard and plastic.
 - The development of initiatives aimed at making the municipality one of the most sustainable and respectful with the environment and its surroundings by setting up photovoltaic panels in municipal public parking lots for self-consumption, charging electric vehicles and supplying energy to different public buildings and even to families that have suffered immensely from the current crisis caused by the COVID-19 pandemic.
 - Total refurbishment of the “Es Vinyet” sports centre. This facility will be a sustainable building model. Its solar panels and biomass boilers will supply enough energy for the whole building, swimming pools, showers, heating, etc.
 - A cooperation agreement between the church of Andratx and the Town Hall has been reached allowing visitors can go to the church on specific days of the week. The parish church of Santa Maria in Andratx is one of the town’s most representative buildings and was built in 1248.
 - The organisation of sea and mountain races in natural surroundings and also in the town of Andratx (Race around Sa Dragonera with dugout canoes and swimming, Lorenzo Avilés Triathlon, ‘Brutaló Andratx.’)
 - Promotion of mountain tourism with the creation of new trails (hiking, cycling) and a new mountain shelter.

- **Sant Llorenç des Cardassar Town Council.** The council has applied the RESCO Guide for the Resistance, Recovery and Reorientation of the Cala Millor coastline 2020-25. It is a strategic document to help deal with the effects of the social and economic crisis caused by the COVID-19 pandemic. The Guide includes four Strategic Approaches: Destination reputation and identity; Hospitality and trust; Territory and Society; Governance and Sustainability. Thus, among other initiatives, the council also supervises the seventeen SDGs and the Agenda 2030, analyses public administrative management models, has agreements with different organisation and has become a member of the Smart Tourism Destinations’ Network (DTI for its acronym in Spanish)

- **Manacor Town Council.** In 2016 the council joined the new “Covenant of Mayors for Climate & Energy”. Making towns and cities inclusive, safe, resilient and sustainable and adopting urgent measures to fight against climate change and its effects are among this Covenant’s objectives. To improve the sustainability of its shores and beaches, the council is also carrying out a Project to Manage everything to do with Manacor’s coastline’s Urban Coves and Beaches. It plans explicitly to improve the quality of the beaches and boost their reputation:

 - Continue with Quality Management. Manacor’s nine beaches are accredited with either the UNE-ISO 13009:2016 Standard on Beach Management or with the Q for Tourism Quality. Manacor Town Council’s Tourism Delegation supervises this ISO standard.
 - Sustainable management of the beaches: treatment of *Posidonia oceanica*, waste and used materials.

- Boost their reputation. Purchase sustainable and good quality sun loungers, beach umbrellas, etc. and include the town council's corporate image on them.
 - Significantly reduce the number of sun loungers, beach umbrellas... by half.
 - Digitisation of beach management: payment methods, etc.
- **Santanyí Town Council.** The council is carrying out the following initiatives:
 - Bike lanes to boost sustainable tourism. The new project is to take the bike lane from Calonge to Cala Ferrera.
 - The "Clean Boating" movement that aims to reduce the amount of plastic in the sea involving the nautical sector (PPP mentioned above).
 - Subsidised collection of organic matter at hotels to boost selective waste collection.
 - Installation of LED lighting at the Cala Figuera Port
 - **Alcúdia Town Council.** The council has started-up different initiatives to guarantee sustainability in the municipality:
 - Installation of electric vehicle charging stations in public parking lots.
 - Replacement of public lighting systems with LED lighting.
 - Replacement of diesel boilers for gas ones for the S'Albufera Primary School's heating and water systems.
 - Drafting and approval of the council's Urban Mobility Plan.
 - Drafting and approval of the municipality's Climate and Sustainable Energy Action Plan.
 - Implementation of the "*Muévete con transporte público*" (travel on public transport) campaign to raise people's awareness about public transport use.
 - The launch of a campaign to reuse fabric bags during the Christmas shopping period.
 - Promotion of nature tourism with the creation of trails and the publication of leaflets and maps in six different languages (Catalan, Spanish, English, German, Swedish and French) for "birdwatching."
 - Promotion of hiking trails with the publication of leaflets including these trails in six different languages (Catalan, Spanish, English, German, Swedish and French). Promotional video. Campaign to recycle plastic glasses distributing reusable ones at local festivities.
 - Promotion of quality and cultural tourism with the reinforcement and adaptation of *Puerta de Vila Rioja's* medieval rampart; widening of the walls' top walkway and partial restoration of the end of the Northern section to the Gate of San Sebastian; and the reinforcement and adaption of the Espuela rampart.
 - Inclusivity and accessibility with activities to raise awareness, train and educate, remove architectural barriers, accessibility guide, apps
 - Ecotourism emblem. The Council awards different kinds of organisations with an emblem in recognition of their excellent environmental management.



- The council implements a Beach Management Plan, and eight of the municipality's beaches implement ISO 14001:2015 and ISO 9001:2015 standards.
- Implementation of campaigns to improve the selective collection of waste in schools.

- **Felanitx Town Council.** To increase cycle tourism and hiking tourism, the council has created several bike lanes linking the area's most important tourist spots:
 - Construction of a bicycle lane alongside a large part of Portocolom's seafront, running from the village's new regulating pond to the old part of town.
 - Construction of a bicycle lane in Portocolom's *La Fe* neighbourhood leading to the *Closos de Can Gaià* archaeological site.
 - Construction of a bicycle lane in the tourist resort of Cala Ferrera.





6 SITUATIONAL ANALYSIS, CURRENT ISSUES AND TRENDS

6.1 The situation of tourism in Mallorca

The Balearic Islands are the second most-visited autonomous community in Spain in terms of international tourists, beaten only by Catalonia. This archipelago, a leading destination mostly thanks to Mallorca, is located in the western part of the Mediterranean and has become a favourite destination for tourists from all over Europe, especially from Germany and the United Kingdom. The Mediterranean climate and its impressive coves make the island a perfect holiday spot.

Like any other tourist destination, the hospitality industry plays a significant role in Mallorca. The different kinds of tourist accommodation establishments, restaurants, bars and cafés are an essential part of the regional economy, with around 200,000 people working in this industry during the summer season. In 2018 more than 7.7 million tourists chose to stay in one of the island's many hotels (IBESTAT, 2019¹⁷), four-star hotels in most cases. As for occupancy, all of the archipelago's islands recorded annual occupancy levels above seventy per cent, a percentage that goes up even more during the summer months.

Some of Spain's most important hotel chains are based in the Balearic Islands. For example, Meliá Hotels International is very proud of being Spain's top hotel chain regarding number of rooms and annual turnover. As well as having hotels in Spain, it has hotels all over the world and employs more than 45,000 people.

The island's prominent tourism sector which resulted from a drastic transformation several years ago, can currently and in certain areas, be identified as mass tourism, defined by a tourism system with most of its hotel

¹⁷ https://ibestat.caib.es/ibestat/estadistiques/614884d6-737a-401d-a8c3-a35519b8fec9/032d8a83-de9f-4344-8137-9fa84a5e3ff4/es/l208013_i030.px

beds in the “territorial triangle” formed by the districts of *Badia* (Bay of Palma), *Llevant* (East) and *Nord* (North). Eighty-eight per cent of the island’s hotel beds can be found within this triangle. This, together with changes in demand, events like the collapse of Thomas Cook and the crisis caused by COVID-19, have had a huge impact on the global tourism market, highlighting the need to rethink a new approach within the island’s tourism and area context.

This new approach should strive for a constant balance between tourism and sustainability on the island, not only by promoting its major infrastructure, but also its major attractions, which range from its beautiful beaches to the *Serra de Tramuntana* mountains.

According to Mastercard’s Global Destination Cities Index (2019), Palma is among the Top 20 World Destination Cities, even ahead of cities like Bali and Hong Kong.

This positioning is accentuated when looking at the impact and repercussion the tremendous amounts of visitors have on the area; here the index once again places Mallorca, the City of Palma specifically, as a benchmark destination worldwide. This time it is in the Top 10, with its impact largely compared to cities like Tokyo and Paris. This impact is further accentuated when evaluating tourism spending per resident (ratio between the expenditure of international overnight visitors and GDP), an index in which Palma de Mallorca records spending of \$10,421, only below cities of the likes of Phuket (\$20,459) and Dubai (\$11,006)¹⁸.

Although the island of Mallorca is today one of the top world destinations for beach tourism, new tourism models and behavioural patterns make it necessary to strengthen its positioning, in favour of its own global competitive edge.

According to the latest update from the Balearic Islands Global Competitiveness Index (i|ICG¹⁹; 2017), the region as a whole ranked 173 in the global competitiveness ranking that includes 264 EU-28 regions; showing an increase from the previous result given by the same ratio in 2014 (when it was 175th), climbing two positions.

This upward trend in the global competitiveness ranking is explained primarily by the positions gained over other Spanish regions, climbing two places after overtaking Asturias (position 175) and Castilla y León (position 177). Thus, out of Spain’s seventeen autonomous communities and two autonomous cities, the island comes in at tenth place.

Based on this line of work, where fundamental parameters are analysed to measure the increase in the Balearic Islands’ competitive edge as a whole (Tourist Intensity, Accommodation, Connectivity with source markets, etc.), it is necessary to establish the island of Mallorca’s position, not only with regard to its competing destinations but also taking into account those attributes or parameters that will lead the island’s future prospects. These parameters are:

¹⁸ <https://en.nexmallorca.com/diagnosticodepartida>

¹⁹ <https://www.impulsabalears.org/index.php/recursos/i-herramientas/i-icg>

- **Connectivity:** Although the concept of connectivity is quite broad, in this case, being an ISLAND, it is necessary to analyse tourism's dependence on flight connections, as well as the volume of passengers arriving on the island and their direct relationship with load capacity. Therefore, it is important to mention that Mallorca Airport is in third place where passenger traffic is concerned, with almost 16 million passengers recorded in 2018, representing a total traffic share of 14.7%.²⁰
- **Consolidation:** Since the 1960s, the island has established itself as one of Spain's most important tourist destinations and as one of the best European tourist destination in the "sun and beach" segment. Nevertheless, its current positioning needs to be assessed from the perspective of supply and demand by observing Mallorca's competitiveness and value for money compared with other competitor destinations.
- **Innovation:** Based on this and considering Mallorca's great potential and versatility, we find it is necessary to assess the island's innovation level compared with its competing destinations, from a technological point of view and a market perspective. They need to be compared, focusing on their ability to generate products that give the destination value and help diversify its offering.
- **Sustainability:** According to UNWTO, Sustainable Tourism is defined as "A type of tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities".
- **Travel and Tourism Intelligence – Smart Tourism:** The presence of technological tools for measuring, analysing and assessing data, currently form an essential base within strategic planning, allowing for knowledge transformation and its adaptation to the actual requirements of demand and the destination as a whole.
- **Branding and promotion:** Assessing this parameter is crucial within the current concept of tourism promotion as it makes it possible to measure how competing destinations currently transmit sensations and emotions. In this regard, elements such as the brand, the slogan or the presentation of the offering as a whole and even the tone used to reach the different potential segments, will improve the destination's image and reputation, introducing a new value in addition to the strategic marketing initiatives carried out.
- **Seasonality:** Another fundamental aspect to consider regarding Mallorca's positioning, is seasonality, very pronounced as we are talking about a destination that has traditionally been a sun & beach destination. However, its role in positioning is not necessarily seen as negative, but rather as having an influence on the island's ability to transform and its versatility as a tourist attraction.

Based on the global evaluation of the variables mentioned above, we find that the growth capacity of a destination such as Mallorca is closely related to its capacity for innovation in terms of tourism products and its ability to influence the market (branding and marketing). Tools focused on "Smart Destinations" (Tourist Intelligence) will be essential in the destination's decision-making and strategic planning.

This current and foreseeable positioning of Mallorca gains value when comparing it with its main competing destinations. It allows us to set the map and roadmap that will be followed when making strategic decisions for the destination itself and its future marketing initiatives. Based on this, the following initial comparison has been carried out:

²⁰ Datos AENA, 2019.

National destinations	International destinations
Andalusia	Turkey
Catalonia	Tunisia
	Croatia
Islands	Islands
Canary Islands	Sardinia
	Malta
	Sicily
	Crete

Source: Strategic Tourism Plan for Mallorca 220-2023; FMT, Mallorca Island Council.

When initially comparing these destinations, the first evaluation of variables finds that Mallorca's future position will be thriving compared to some of its main competing destinations, especially when looking at the performance variables that were considered essential when making decisions related to Mallorca's future marketing and tourism planning.

The significant number of tourist facilities in Mallorca, along with its excellent connectivity and product growth potential, herald a new beginning for the destination, which will be boosted by a commitment to sustainability and the introduction of Tourist Intelligence measures.

6.1.1 Travel and Tourism Trends

At present, the tourism sector is really feeling the consequences of the international crisis caused by the COVID-19 pandemic. And there are still many uncertainties ahead.

Based on an analysis carried out by Exceltur²¹ in the fourth quarter of 2019 on tourism trends, Spain's current tourism scene is characterised by the following relevant aspects:

- A significant drop in travel and tourism: a slowdown in Spain's foreign tourism market with a sharp drop in tourist arrivals and income stagnation.
- More tourism in inland tourist destinations and less coastal tourism: positive business prospects for Spanish inland tourist destinations and a generalised drop in coastal destinations.
- Brexit: the uncertainties regarding Brexit will condition the British tourism market in Spain.
- Less tourism income: Thomas Cook's collapse in 2019 has dramatically reduced the income from European tourists booking through tour operators, especially those from Britain.
- A lower influx of European tourists: the drop in connectivity from northern and central European countries to Spain will reduce the arrival and expenditure of Nordic, German, Swiss and Dutch tourists.
- An increase in competing destinations: market recovery in Eastern Mediterranean competitor destinations will continue to reduce Spanish tourist destinations' market share.

- A decline in business tourism: the slowdown in economic activity in the last quarter of 2019 generated less dynamism in business travel and tourism. Now, this has been enhanced even more due to COVID-19.

Another study that sheds light on the tourism sector's new trends is Booking.com's study on Travel Predictions 2020²². In this study, Booking.com draws on its research among more than 22,000 travellers across 29 markets, and identifies the following key travel and tourism trends:

- A rise in secondary tourist destinations: travel to secondary destinations or to less-known places to reduce 'overtourism' and protect the environment.
- More technology: technology that offers travellers options that surprise them and an App that lets them look for and book activities easily and quickly online in real-time.
- More relaxing trips: use of slower means of transport to reduce their environmental impact and choose a longer route to enjoy the journey.
- Pets as a top priority: choice of destinations depending on whether pets are or not allowed.
- Intergenerational getaways: increase in the number of grandparents going on holiday with their grandchildren leaving the middle generations at home.
- Food and cuisine as a top priority: holidays planned around the destination's culinary products, hoping to be the first to taste the local food.
- Long-term travel plans: pensioners who want to spend their free time travelling or people who want to take a year off and travel for several months in a row.

SEGITTUR, the Spanish State Society for the Management of Innovation and Tourism Technologies, has recently identified the twenty most significant challenges tourist destinations have to deal with in their digital transformation²³:

- Destination managers find it difficult to interact with travellers at the destination because as well as being their customers, they are also customers of tour operators, airline companies and hotels. Therefore, destination managers must focus on how tourists relate to the destination, with its residents, businesses, etc., making use of technology to interact better.
- Underuse of technology to attract strategic segments and those of interest for the destination.
- Underuse of economies of scale generated by technological infrastructures to benefit their adoption.
- Poor use of digital marketing.
- Lack of available data for tourism management. The value of this data needs to be enhanced because it is necessary for decision-making.
- Lack of real-time information for tourist destination managers to use.
- Its value proposition does not include products that set it aside from other destinations.
- Lack of digital content consistency.
- Low participation in tourism governance.

²² <https://travelpredictions2020.com/espanol/#4>

²³ https://www.hosteltur.com/140397_veinte-retos-que-afrontan-los-destinos-en-su-transformacion-digital.html

- Low digital adoption in tourism sector SMEs. Destination managers need to encourage digital transformation so that tourism-related SMEs become more solvent, digital and competitive.
- Difficulties in finding out how satisfied visitors are and knowing what they think.
- Inefficient management of tourist mobility: capacity controls, queues, beach access, etc.
- Lack of a system to control houses and apartments for tourist lodgings that are advertised on major platforms.
- The response given to the problems citizens have with tourism, or lack of it, needs to be improved.
- Not knowing other destinations competitive edges.
- Crowded tourist spots and attractions and the need to improve urban space management.
- Insufficient measures implemented to mitigate ecological footprints.
- Unequal distribution of the wealth generated by tourism.
- Residents' negative perception of tourism.
- Lack of tools for environmental management.

6.1.2 The impacts of COVID-19

COVID-19 has had drastic effects on the international tourism sector. According to data published by IBESTAT²⁴, in August 2020, only 495,432 tourists came to Mallorca, representing a 72.58 per cent drop compared to August 2019 (welcoming 1,807,113 tourists). As for the period from January to August (1,678,296 tourist arrivals), numbers are 80.78 per cent lower than in 2019.

Most tourists in August were Spanish (187,215, representing an 18.5 per cent drop compared to August 2019 and a market share of 37.8 per cent), German (124,094 tourists, falling 76.9 per cent with a share of 25 per cent) and French (43,182 tourists, -60.3 per cent and an 8.7 per cent market share).

From January to August, tourists spent a total 1,525.1 million euros, with a variation of -82.7 per cent compared to the same period of 2019. During these eight months, national tourists spent 50 per cent less than in the same period of 2019 and international tourists -85.7.

Six hundred seventy-three establishments opened in August, 49.8 per cent less than the same month of 2019. The total number of available hotel beds was 116,620, representing a 56.2 per cent drop compared to the previous year. The hotel bed occupancy rate was 39 per cent, with a negative variation of 51.9 points compared to 2019.

Travel restrictions due to the spread of the COVID-19 virus have marked August 2020's data.

Furthermore, due to the restrictions implemented because of COVID-19, no cruise ships arrived on the island in August 2020. During the first eight months of 2020, the ports run by the Balearic Islands Port Authority (APB for its acronym in Spanish) recorded 84.2 per cent fewer cruise passengers setting sail from the islands (almost 100 per cent of these in Palma), while transit passenger dropped by 95.2 per cent year-on-year.

²⁴ *Tourism in numbers, August 2020 report*. AETIB, 2020.

In August 2020, the arrival of regular maritime passengers dropped by 26 per cent compared to the same month of 2019 in the ports managed by the Port Authority. From January to August 2020, arrivals dropped 47.9 per cent compared to the same period of 2019. On a one to one basis, data is negative at all the ports.

TOURIST ARRIVALS TO MALLORCA		
Total from January to August 2020		
Origin	Num. Tourists	% VAR 19/20
Spain	537,189	-53.1
Germany	598,713	-79.9
United Kingdom	125,613	-92.9
France	82,425	-79.3
Italy	25,096	-85.8
Netherlands
Switzerland
Nordic countries	48,457	-91.2
Belgium
Russia
Total	1,678,296	79.5

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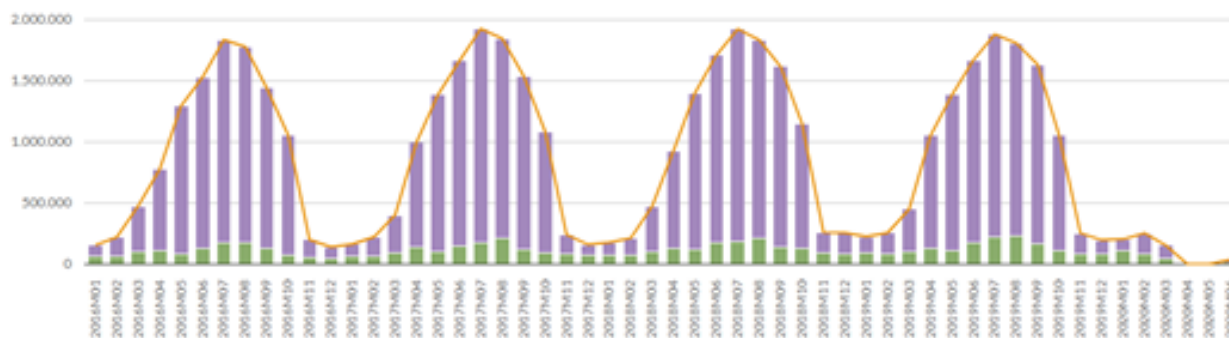
Source: AETIB, 2020.

Another significant figure is that of tourist spending. In June 2020, spending dropped by 98.2 per cent compared to 2019, and the total amount spent on the island of Mallorca from January to August 2020 shows an 82.7 per cent decrease.

TOURIST SPENDING ON THE ISLAND OF MALLORCA		
Total from January to August 2020		
	Mallorca	% VAR 19/20
Total (million €)	1,525.1	-82.7
Per person (€)	908.7	-9.8
Per person and day (€)	121.3	-20.6
Overnight stays	12,578,359	-78.2
Average stay	7.5	+13.6

Source: AETIB, 2020.

The following graph shows a pronounced drop in the number of tourists during the current season due to the pandemic's impact. Thus, it shows how in June, numbers have gone from 1.6M tourists to just 36,662. The graph is broken down by national tourists and foreign tourists.



Evolution of the arrival of tourists to Mallorca (from 2016 to June 2020)

■ National ■ International — Total

Source: The Balearic Islands' Institute of Statistics (IBESTAT), 2020.

The dependence on foreign markets is notable, representing 87 per cent, with the German and British markets standing out. The national market represents 13 per cent.

On the other hand, being an island, all of Mallorca's tourism depends on arrivals to its international airport Son San Joan and its two ports (Palma and Alcúdia). In both cases, the decrease in the number of arrivals has been drastic.

AIR PASSENGER ARRIVALS TO MALLORCA		
Total from January to August 2020		
Origin	Num. of Passengers	% VAR 19/20
Spain	971,484	-56.8
Germany	729,320	-79.6
United Kingdom	160,156	-92.3
France	79,084	-76.6
Italy	33,961	-83.0
Netherlands	38,084	-81.9
Switzerland	73,613	-79.3
Nordic countries	39,620	-93.0
Belgium	21,854	-82.3
Austria	26,683	-88.6
Total	2.895.986	<b style="color: red;">-77,6

Source: AETIB, 2020.

ARRIVAL OF CRUISE PASSENGERS TO MALLORCA				
Total from January to August 2020				
Port	Base	% VAR 19/20	Transit	% VAR 19/20
Palma	100,048	-84.2	56,709	-93.5
Alcúdia	0	-100	0	-100

Source: AETIB, 2020.

This sharp drop in arrivals and tourist spending has dramatically affected the number of companies registered with the social security, **-8.9 per cent** of companies registered in the second quarter of 2020 compared to the same period of 2019.

According to data published by AETIB, the number of people registered with the social security, working in the tourism sector dropped on all of the islands in the Balearic archipelago during the second quarter of 2020, to 30.7 per cent year-on-year, totalling 142,355 (105,511 in Mallorca, representing a year-on-year variation of -28 per cent). The number of people employed during less than a full year people in the tourism sector increased between April and June 2020, by 0.3 per cent if compared to the same period of 2019. In the second quarter of 2020, workers' temporary employment rate in the tourism sector (11.1 per cent) dropped 14.1 percentage points year-on-year. The number of tourism companies registered in the Balearic Islands fell to 10,965 in the second quarter of 2020 (16.8 per cent less than in the same period of 2019).

Due to the pandemic, travel restrictions are still in place, so uncertainty and the lack of a realistic outlook continue to dominate the situation in the Balearic Islands as well as in the world over. However, great lessons can be drawn from 2020, an untypical year:

- Having to adapt to new health and hygiene protocols has forced the tourism sector to rethink **a good part of its processes** and how it **interacts with its customers** while maintaining the quality standards that characterise the Balearic Islands' tourism companies.
- This situation has contributed to getting the sector's primary stakeholders (particularly the hotel sector) further committed to a **more responsible tourism model**. Significant findings and standards to become more resilient and more sustainable will emanate from this.
- The pandemic has accelerated trends that were already being adopted by the sector, moving towards a **circular model** that is committed to maintaining the functional value of materials and resources for as long as possible in production and consumption systems.
- One of the lessons learned from the pandemic is that tourism has to be understood as a sector that contributes to **improving the health of the ecosystems** we base our activity on. This results in the safety and health of the entire world population.

6.2 Regional Development – SWOT

6.2.1 Assessment of the Situation: SWOT synthesis

Below is a synthesis of the SWOT analysis used to strategically analyse the island's main features as a tourist destination based on two aspects: internal and foreign markets. Therefore, it will define the main Strengths, Weaknesses, Opportunities and Threats that define the current situation of tourism in Mallorca.

WEAKNESSES	THREATS
<p>W1. Mallorca's reputation as a destination for mass tourism.</p> <p>W2. Merely informative websites that only include archives of the island's products.</p> <p>W3. Poor</p> <p>D3. Not enough marketing carried out to attract the national market.</p> <p>W4. A need to promote local products and businesses as dynamic elements of quality tourism.</p> <p>W5. Tourist information offices in different towns do not coordinate with each other to promote tourism homogeneously.</p> <p>W6. Poor adaptation of tourism professionals to the new profiles and needs of tourists and innovative products.</p> <p>W7. Increase promotion at exhibition and trade fairs and shows.</p>	<p>T1. Cessation of travel and tourism activity due to the restrictions imposed to fight against COVID-19.</p> <p>T2. Growing dependence on online tour operators, many of which are based on the low-cost concept.</p> <p>T3. A downtrend in foreign travel and tourism in Spain.</p> <p>T4. Changes in British travel and tourism due to Brexit.</p> <p>T5. Recovery of Eastern Mediterranean competitor markets.</p> <p>T6. A drop in business tourism due to the downturn in economic activity.</p> <p>T7. Loss of qualified professionals and companies in the long-term.</p>
STRENGTHS	OPPORTUNITIES
<p>S1. Both public and private organisations are involved in the Balearic Islands' strategic and promotional tourism planning.</p> <p>S2. Palma is among the global top 20 destination cities.</p> <p>S3. Flight connections from Palma airport to destinations abroad and in Spain.</p> <p>S4. Consolidation of Palma's port as one of the most important ports in the Mediterranean.</p> <p>S5. Increase in nation tourism spending.</p> <p>S6. Consolidation of beach, nature, leisure and amusement segments.</p> <p>S7. Palma as an example to follow for urban and city break tourism.</p>	<p>O1. Based on tourism trends and tourist behaviour, ecotourism and luxury tourism are potential segments to boost on the islands.</p> <p>O2. More tourism in inland destinations.</p> <p>O3. The growing demand for a type of tourism that is increasingly specialised and aware of the importance of sustainability in tourist destinations.</p> <p>O4. The search for secondary destinations to reduce overtourism and protect the environment.</p> <p>O5. New digital marketing trends that greatly influence the market, and make it possible to promote and offer a lot more information about tourist destinations.</p> <p>O6. In response to the COVID-19 crisis, an increase in national tourism and the search for safe and nature-based tourist destinations.</p>



O7. The forced stoppage caused by COVID-19 has given the tourism sector time to analyse the situation and make the necessary changes to improve its operations and work on digitisation and adapting to the Sustainable Development Goals.

6.3 Consumer Trends

Tourism in the Balearic Islands dates back to the sixties and was essentially mass beach tourism. Tourists travelling to the island were looking for cheap holidays, and they were mainly lower-middle-class European citizens.

Traditionally, Mallorca has positioned itself as a sun and beach destination with tourists booking through tour operators. Typically, these tour operators work with closed groups of tourists and fly them out on their own planes, putting them up in hotels they have the exclusive rights to. Its primary markets are Germany and the United Kingdom.

However, beyond the island's all-inclusive resorts, there are other kinds of travellers looking for different products. Younger generations come looking to enjoy local culture and ways of life, while new tourist destinations emerge with better offers for traditional customers. So, to adapt to the new demands and requirements of tourists, tour operators have been forced to redesign their static packages and offer larger rooms, "fantastic food", vegetarian products, local experiences and the possibility of being connected to social media at all times.

With millennials, customer profiles change. We live in a world where all business models are being disrupted.

According to data from the National Institute of Statistics, the sale of holiday packages to Spain has dropped drastically. This trend is made evident in its statistics on tourist spending. The spending of tourists travelling without holiday packages represents 68.3 per cent of total expenditure, and the annual rate is increasing, while that of those buying holiday packages is on the downturn.

As a result of these changes, the Balearic Island's sun and beach tourism model is changing. Tourism is becoming less dependent on Tour Operators, and the island is promoted as a quality destination.

Within this global context, and now that we have Digital Visitors, we need to consider the changes in demand. These changes must be included in the strategic planning and development plans of any tourist destination that values itself. Digital Visitors are a very attractive market, but their needs and demands are very different from those of traditional tourists. So, the way, the means and the tools used in marketing and promotion need to be adapted.

These new trends show:

- **Hyperconnected customers** who use new technologies, especially smartphones, to look for and organise everything to do with their trips: from the use of specialised travel and tourism search engines to booking flights, checking-in at their hotels, and applications to find tourist attractions or guide them on their trips. They also use these new technologies to go on social networks and leave comments with their opinions on services and attractions.
- **Knowledgeable Customers:** Digital Visitors find out everything there is to know about the place they are travelling to, and most importantly, they go on specialised social networking platforms and internet forums to see what other users think of hotels, restaurants, places of interest, etc. Online reputations are vital for the tourism sector in the digital era.

- **Customers that interact:** Digital visitors require personalised responses and customer support when purchasing travel and tourism services. So this means that those in charge of Customer experiences need to be on top of all the questions visitors post on their company's' different communication channels (especially social media).
- **Customers looking for new experiences:** one of the great advantages of the 'tourism-technology coupling' is the tremendous potential ICTs have of surprising visitors and personalising their experiences and the services offered to them. In this sense, the development of Gamification initiatives or new applications in the field of tourism must go hand in hand with the search of these new and increasingly personalised experiences.
- **Customers increasingly accustomed to using tools and applications** to get the most out of sharing resources. We are talking about the success of experiences like Blablacar or Airbnb that have taken on essential roles in tourist experiences. They are living proof of the tight connection between tourism and new technologies.
- Customers who are starting to believe more and more in the benefits of **Smart Tourism Destinations**, where tourism merges with new technologies to offer visitors increasingly more complete experiences.

6.3.1 Millennials

Millennials (born between 1981 and 1993) are digital natives, which means they can use several devices at the same time. Social networks are an integral part of their lives and one of their main personal communication channels. They use these means to interact with brands and look for information on their next tourist destinations.

Millennials generally travel cheaply. They look for fun and technology, free Wi-Fi, social networks, and sharing economy travel platforms on their travels. They usual arrange everything to do with their getaway themselves.

According to a report published by Internet Marketing INC²⁵, "85 per cent of millennial travellers go on different websites before booking their trip to make sure they get the best price possible" and "46 per cent book everything on their smartphones or tablets". In short, for millennials, travel is an opportunity to share moments and experiences with family and friends on social networks. For this reason, the tourism sector must take note and take all of this into account, because this generation does not hesitate to share their opinion, whether it be positive or negative, about the place where they are staying, its facilities, the service, liveliness, leisure offer and entertainment. They want to enjoy authentic local experiences, look for flavours and experiences with a certain level of quality, and they don't want shows for tourists. They check out more than ten online sites before buying.

According to this same report, 42 per cent of last-minute travellers are between 25 and 37 years of age (millennials). In fact, 33 per cent of them claim to have booked at least one last-minute trip in the last three years. Therefore, it is essential to choose a fitting strategy for this audience, focusing on their habits when planning their holidays. Eighty-one per cent of all millennials check out the internet for their trips. Travel

²⁵ Millennial Travel Trends: A Look at the Largest Generations' Habits. Internet Marketing INC, 2017.

websites and blogs are their main source of information when deciding where to go or where to stay (44 per cent use this information source), followed by social networks (checked out by 29 per cent of them). This age group shops 87 per cent of trips online and this percentage increases to 92 per cent when talking about last-minute bookings.

- They like P2P (Peer to Peer) and sharing economy platforms like Airbnb (accommodation), Uber (transport) and Festly (food).
- They are great users of tourist Apps that give them an added value and help them have better experiences while away.
- They value their friends' recommendations more than those of travel agents. Eighty-five per cent of them admit that other people's recommendations affect their travel decisions.
- This generation prefers to spend less on each trip and visit more places than spend a lot on each trip and only be able to visit a few places.
- They expect to receive recommendations based on their tastes and travel budget.
- Millennials are much more concerned about their safety than their preceding generation. Hygiene at the destination is paramount for them. They are more worried about their safety when they are away on holiday in foreign countries than on holiday in their own countries.
- "The safer and more Wi-Fi the better". They do not only expect Wi-Fi to be free; they also expect it to work flawlessly throughout their hotels.
- They opt for authentic experiences. This generation is looking for real experiences and not tourist products. ESERP Business School also concludes that Millennials prefer more than two-day trips to explore the destination better and do activities that will bring them closer to their surroundings.
- They publish photos of everything on social networks. Ninety-seven per cent of Millennial travellers post about their travel experiences while still away, and seventy-five per cent post an image or video every day. Sharing on social networks is another part of their travelling experience.
- Most Millennials are well qualified or trained and have completed higher education and are also proficient in languages.
- They are very loyal to their favourite brands. They have a conservative side; they reward their satisfaction with a brand by keeping loyal to it.
- They are demanding and want to be up to date. When shopping, they take as much time as they need to make sure they choose the best offer.

6.3.2 Mobile Technologies

Mobile technology is the star of today's new ways of travelling. Smartphones have become our tourist guides, travel agencies, best restaurant finders, maps, etc. They are with us throughout the whole shopping and buying process. In fact, according to TripAdvisor, 45 per cent of users use their Smartphones for everything related to their holidays.

According to a report published by Travelport²⁶, today, web traffic from mobile devices is greater than that of desktop devices, and smartphones have become the fastest growing payment channel in the tourist industry,

²⁶ Mobile Travel Trends 2019. Travelport, 2019.

6.3.3 Social media

In recent years, social media has become a truly global phenomenon. Social networks are not only used by millennials daily but also by those defined as Generation X, and even by those belonging to the Baby boomers' Generation.

As reported by Hosteltur²⁷, people who organise their holidays online spend an average fifteen hours on the different stages of looking for information, planning and booking. This time is spread over several days, weeks or months and spent on multiple devices. Throughout the process, social media plays a significant role, acting as a fuse that triggers shoppers' interest and a subsequent chain of actions.

The importance of social media as a starting point and/or source of inspiration for travel planning is something companies, and destinations are really starting to notice.

In fact, in the tourism sector, investments advertising on Facebook and Instagram have overtaken those made in Search Engine Marketing (paid adverts on search engines).

In 72 per cent of the cases, last-minute bookings are made online. Fifty-three per cent of these bookings are motivated by online ads seen on travel websites and search engines. Therefore, online marketing is emerging as an ideal strategy for accommodations that still have available rooms, etc.; for hotels that are less used to using this type of advertising.

According to a study by Google Travel, 74 per cent of people travelling for leisure plan their trips online, while only 13 per cent still do it through travel agencies.

Millennials have also had a lot to do with this paradigm shift. They are passionate about travelling, and they are real fans of new technologies. This combination has given rise to a new context where social networks, applications, blogs, etc. play a significant role in travel planning. And at the same time, the industry, aware of this trend, has adapted its business model and its offerings to attract this entire market.

6.3.4 Circular Economy

Circular economy is an important way forward because it allows the tourism sector's stakeholders to simultaneously activate drivers of efficiency, innovation and sustainability, essential to boost a greater tourism value. Circularity is a necessity for both the economy and society.

According to the Impulsa Balears Foundation, the introduction of a circular economy into Mallorca's tourism sector would mean saving 175 million euros a year by 2030 and the creation of 4,000 new jobs. The introduction of circular economy will help the Balearic Islands 2,497 industrial companies that consume 800

²⁷ https://www.hosteltur.com/132851_marketing-digital-y-redes-sociales-lo-que-viene-en-2020.html

million euros in raw material, reduce this amount by 15 to 20 per cent, which would increase the growth of Mallorca's tourism sector by 0.6 per cent.

Regarding employment, Fundació Impulsa Balears, which defines itself as a platform for transforming the tourism sector's competitive edge on the islands, calculates it would count for the creation of 2,000 direct jobs and another 2,000 indirect ones by 2030.

Mallorca must not grow in the number of tourists but in value, leading to fewer resources being used and products having longer lives. Technology needs to be implemented, the workforce needs to be skilled, and governance must be ambitious. Circular Economy is emerging as an attractive alternative because resources are used based on sustainability and environmental protection criteria. The efficiency of physical and energy resources is maximised, and the generation of waste is minimised. And therefore, resources are used to the full and stay in the production cycle for longer.

Mallorca changed radically with the tourism revolution in the second half of the twentieth century. This led to both positive and negative economic and social consequences that in turn, led to ethical and cultural changes and environmental alterations. The tourism boom coincided with the imposition of the linear economy model, and this leads us to reflect on the negative impact the following figures have on the environment: every million tourists that travel to Spain generate 25 million kilos of carbon dioxide, 1.5 million kilos of waste and 300 million litres of wastewater. Eleven million litres of fuel are consumed, 300 million litres of water and two million kilos of food. It is more than evident that we need to move towards a different model (Cruz Blasco, 2017).

The congress organised by the Impulsa Balears Foundation on *"Hotel circularity and competitiveness, the responsible redefinition of tourism"*, revealed that circular economy is not the easy road to take, but, it is the most consistent with a responsible and sustainable economic model for the future. A collective effort is indispensable, and there is no place for self-interest. The hotel sector acknowledged how circular economy would help make the use of resources a lot more efficient, minimising the volume of emissions and developing a tourism economy model for the Balearic Islands in line with a sustainable, forward-looking approach.

The Balearic Islands' Government has presented their grant scheme to boost circular and social economy for the sustainable management of waste generated by tourism and the creation of jobs for people at risk of exclusion. The project intends to support private initiatives that have a clear environmental and social purpose, contributing to the transition towards a circular economy model. The idea is to substitute a linear economy, based on extracting, producing, consuming and throwing away, for a circular economy where waste that can be used to make new products or raw material is put back into the productive system. In this approach, reducing, reusing, recycling, or the material recovery of waste (waste valorisation) become an essential part of the processes.

Developing a circular economy process in the tourism industry could help to "promote the sustainable use of resources, improve efficiency in the tourism industry and achieve sustainable tourism development.

It is important to attract tourists who are respectful and care about the place where they are travelling. They should be aware of the importance of not generating excessive waste and should follow a series of initiatives not to leave their mark on the planet. Tourists should respect the country's culture, opt for local food, reduce waste production and dispose of it properly, avoid activities that involve animals and go for public transport. "Sustainable tourists are those who by just making that small gesture, enjoy their holidays without leaving their mark on the planet" (Eco-Circular.com, 2017). Public bodies also have an essential role because they have the ability to encourage or discourage companies and tourists themselves from having a circular attitude.

6.4 Destination Management Trends

For years now, the Balearic Islands have been one of Spain's most competitive autonomous communities in tourism. Hence, and since the creation of the "Autonomous Community of the Balearic Islands" (CAIB for its acronym in Spanish), different laws to regulate tourism and all its consequences and impacts have been implemented. Overcrowded tourist areas, being a mature destination, and seasonality are some of the Balearic Islands main problems. For this reason, CAIB enforces regulations that limit or restrict the number of tourist beds on sale with the aim of tourism becoming sustainable, of higher quality and more competitive.

When it comes to technology, we believe Big Data and Blockchain will be the future stars of tourism in Mallorca.

Big Data will become a basic tool for the design, launch and follow-up of a much more personalised offer. Thanks to the exploitation of this tool, global market segmentation will be a lot easier. We will be able to launch extremely-personalised promotions thanks to what we will already know about our customers. For example, for a certain customer, an offer on a particular day, including a specific type of room; or we will be able to design supplementary products considering the tastes and preferences we know our customers have. Lots of companies are already making the most of it.

For example, Meliá Hotels International uses the information it has about its customers to determine the best target audience for each specific campaign. It goes through its databases to analyse people's spending, opinions, the reasons they travel, their nationality, etc. It cross-references this information with public data from the countries of origin to determine the best customer profiles and achieve higher success rates. In doing so, their campaigns are segmented, leading to more success and investment optimisation.

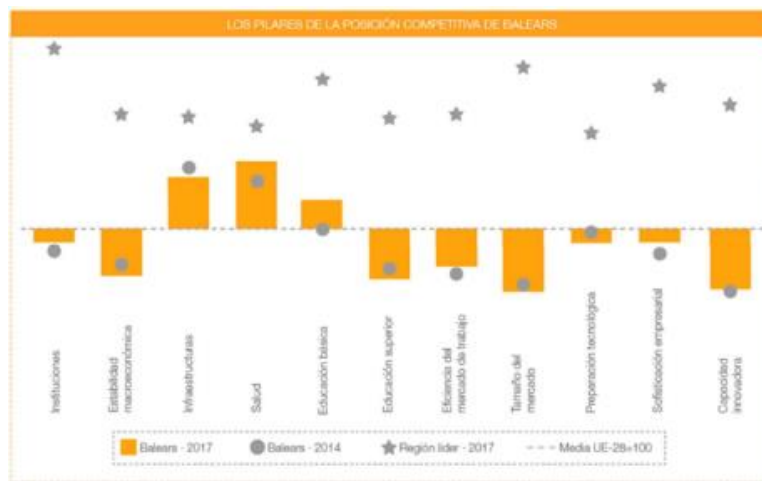
Regarding **Blockchain**, although it is not as developed, we believe it has great potential because it ensures security and assurance in all transactions throughout the tourism value chain, both for end customers and companies. This technology, interconnected with the Internet of Things (IoT) and the massive use of personal connection devices (generally smartphones), could have significant multiplier effects and provide transparency in a market with many intermediaries. Blockchain will also start to change how the travel industry processes and manages online payments, enabling direct peer-to-peer transactions.

6.5 Tourism Destination Positioning Analysis

The island of Mallorca is today one of the most important sun and beach destinations in the world. Nevertheless, new tourist behavioural patterns and models mean its positioning needs to be strengthened in favour of its own global competitive edge, understanding this as its capacity (that of its companies) to produce goods and services that will satisfy international market demands and simultaneously, improve its people's quality of life.

In great part thanks to Mallorca, the Balearic Islands are in eighth place in the **Tourism Competitiveness Ranking** based on the latest update of the Impulsa Foundation's Tourism Competitiveness Index²⁸ (iLLCT). This foundation has analysed 280 regions in 38 different countries that continue to be alternative short and medium stay destinations for the Balearic Islands' main source markets. The Tourism Competitive Index is developed as a strategic surveillance tool, and its findings are that the archipelago is more attractive than most of its direct competitor destinations, and this is thanks to several factors and policies that favour the sector's development and its ability to increase the autonomous community's global competitiveness.

The analysis concludes that the Balearic Islands' favourable position is based, fundamentally, on the pillars of its available facilities and infrastructures, thanks to its leadership in air transport and tourist facilities and amenities – the region is well-positioned in terms of hotel facilities-, followed by its natural, cultural and recreational resources. However, the archipelago also has a wide margin for improvement in matters such as the organisation of tourist areas spatial planning. The index indicates that the degree of sustainable management of certain resources, like water, air quality, and land, does not coincide with tourism's economic and political prioritisation on the islands.



On the other hand, according to the latest figures published by the **Mastercard Global Destination Cities Index** (2019), Palma is among the Global Top 20 Destination Cities, ahead of cities like Bali and Hong Kong.

²⁸ <https://impulsabalears.org/index.php/recursos/i-herramientas/i-ict>

Top 20 Destination Cities by International Overnight Visitor Spend (2018)



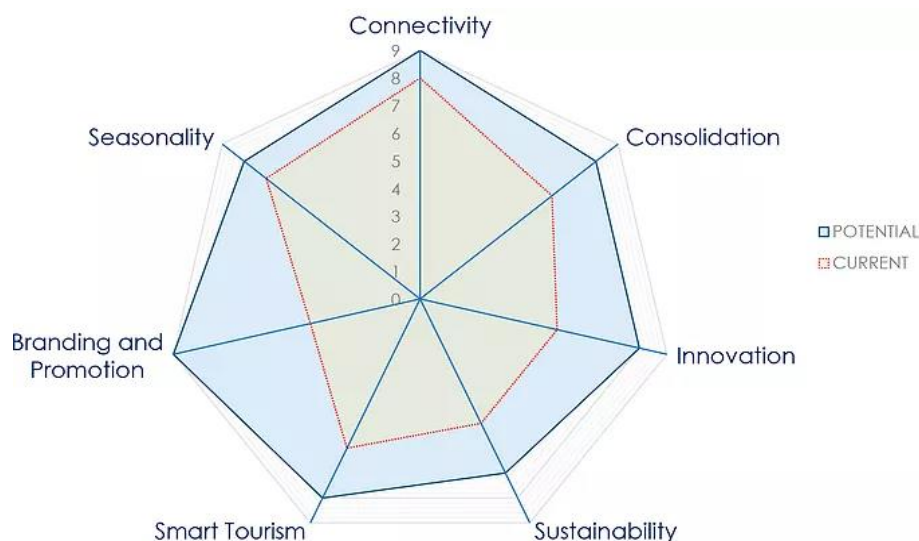
Rank	City	Total Spend (US\$)	Rank	City	Total Spend (US\$)
01	Dubai	\$30.82B	11	Kuala Lumpur	\$11.13B
02	Makkah	\$20.09B	12	Seoul	\$9.31B
03	Bangkok	\$20.03B	13	Las Palmas	\$9.02B
04	Singapore	\$16.56B	14	Bali	\$8.86B
05	London	\$16.47B	15	Istanbul	\$8.26B
06	New York	\$16.43B	16	Los Angeles	\$8.24B
07	Paris	\$14.06B	17	Sydney	\$8.03B
08	Tokyo	\$13.77B	18	Barcelona	\$7.86B
09	Palma de Mallorca	\$12.69B	19	Miami	\$7.70B
10	Phuket	\$12.01B	20	Antalya	\$7.65B

Rank	DESTINATION CITY & COUNTRY	OVERNIGHT INTERNATIONAL VISITOR SPEND (US \$B)		
		2017	2018	2019*
1	Dubai UAE	\$29.70	\$30.82	4.18%
2	Makkah Saudi Arabia	\$21.04	\$20.09	7.94%
3	Bangkok Thailand	\$17.44	\$20.03	8.67%
4	Singapore Singapore	\$16.34	\$16.56	2.66%
5	London United Kingdom	\$17.45	\$16.47	4.64%
6	New York United States	\$15.65	\$16.43	2.93%
7	Paris France	\$12.56	\$14.06	-0.78%
8	Tokyo Japan	\$11.92	\$13.77	12.74%
9	Palma de Mallorca Spain	\$11.99	\$12.69	3.17%

Source: Mastercard Global Destination Cities Index 2019; Índice Global de Ciudades de Destino de Mastercard 2019; Global Top 20 Destination Cities by money spent by overnight international visitors

6.5.1 Mallorca's Competitive Positioning (Current and Hoped-for)

Based on the overall assessment of the variables mentioned above, we find that the growth capacity of a tourist destination like Mallorca is closely related to its product innovation capacity and promotion capacity in different markets (branding and marketing). Tools focusing on "Smart Destinations" (smart tourism) are crucial for decision-making and the destination's strategic planning.



Source:

Mallorca's

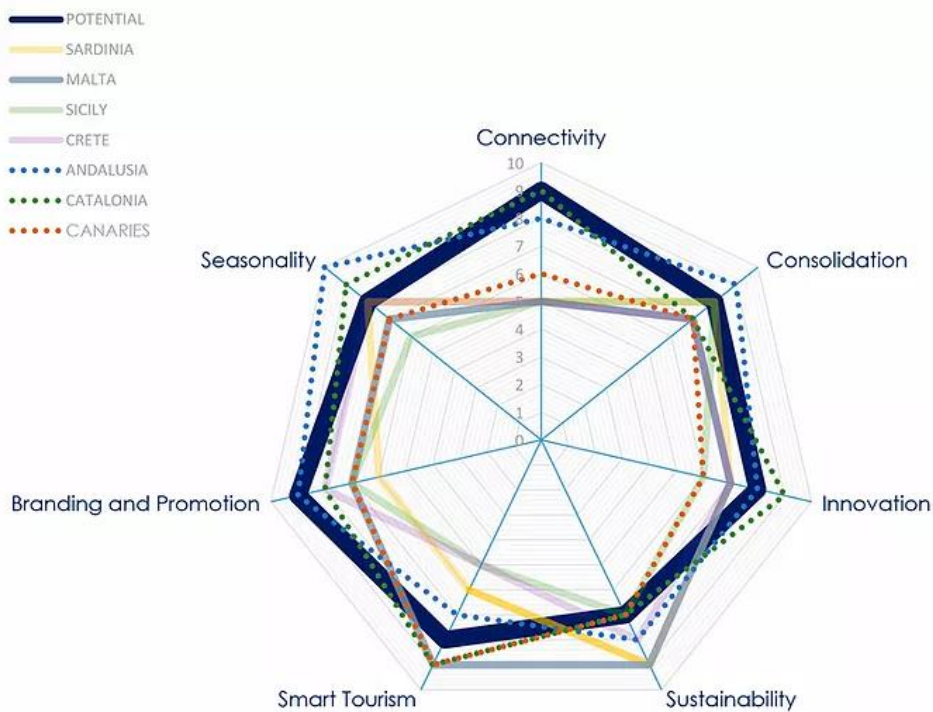
Strategic Tourism Plan 2020-2030, Fundació Mallorca Turismo

Mallorca's current and foreseeable positioning gains an added value when compared with its competitor destinations, enabling us to develop a map and roadmap for strategic decision-making within the destination and its future marketing initiatives.

The first survey of variables in the initial comparison shows that Mallorca's future position is clearly progressing compared with some of its main competitor destinations, especially in the strategic action fields and/or variables mentioned above as essential in the island of Mallorca's decision-making for future tourism and promotional plans.

The considerable amount of tourism infrastructure in Mallorca and its excellent connectivity and product growth potential for products points towards a revival of the destination, which will be boosted by its commitment to sustainability and the introduction of Smart Tourism measures

Potential positioning of Mallorca compared with its main competitor destinations (Initial Survey)



Source: Mallorca's Strategic Tourism Plan 2020-2030, Fundació Mallorca Turismo

6.6 Tourism Destination Best Practices

6.6.1 Sustainable Tourism Tax

The Balearic Islands have implemented a Sustainable Tourism Tax²⁹ (ITS for its acronym in Spanish). This tax is charged to anyone staying at any kind of tourist accommodation on the islands. This tax makes it possible to invest in cultural and environmental projects, research, improving the islands' citizens social conditions, making the destination fully sustainable and providing a better environment and better services for both visitors and residents.

Thanks to ITS, fourteen projects to boost circular and social economy, sustainably manage waste generated by tourism and create jobs for people at risk of exclusion were selected in 2020. For example:

- The **Circle Carbon** composting plant that is carrying out a pilot project to produce and sell BioChar. This project was awarded a grant of 109,000€. Its purpose was to build specialised facilities to make high-quality compost from organic and kitchen waste, as well as from green waste from pruning and gardening. The facilities are operating on an experimental basis, and as well as product-quality tests, the first Biochar production and composting trials are also being carried out. The goal is to become an example for the implementation of future similar facilities.



6.6.2 Circularity Indicator applied to the hotel sector

The Impulsa Balear Foundation (FIB for its acronym in Spanish), together with Iberostar, hotel chain, and under the supervision of UNWTO has defined a new **strategic framework**³⁰ aimed at encouraging a transformation of current hotel business models, moving towards the notion of circularity. The strategic framework's main objectives are the following:

- Encourage companies to set up and monitor best practices and guide them through the process.
- Encourage the creation of circular liaisons within its value chain
- Contribute to reducing the implementation gap of global sustainability standards

²⁹ <http://www.illessostenibles.travel/en/home-en>

³⁰ <https://impulsabalears.org/index.php/recursos/i-publicaciones/i-dossiers/dossier-numero-3>

Thus, FIB has prepared a guide for the implementation of circular best practices that enable the hotel sector's companies to:

- Make decisions concerning assets and processes that have been affected by circularity.
- Draw up new action programmes.
- Identify key circular progress indicators.

Among others, this guide includes a list of 81 indicators (KPIs) that help to measure circular progress in hotels. These KPIs are innovative because, to date, there are no other global circularity benchmarks applied to the hotel industry.

Thus, it should be noted that, at present, the hotel industry in Mallorca is ready and already contributing to this transition towards circular economy, leading a transformation process based on innovation, the adoption of new technologies and the reorientation of know-how towards a new formulation of its operations and services. In fact, the most important companies in the sector hold themselves as proactive stakeholders in this regard, especially in terms of the growing alignment of their corporate social responsibility plans in environmental matters with their respective business strategies and their commitment regarding the compliance of the Agenda 2030' sustainable development goals.

Antoni Riera, director of FIB, points out that, given the Balearic Islands' hotel sector's cross-cutting and broad value chain, this sector could play a very interesting role as a 'Circular Laboratory' and thus be an example in the adoption of circular standards for all other sectors belonging to the tourism value chain and even other productive segments that are relevant in the regional business network.

The foundation is also in the process of developing the iCIRCHOT application, a self-diagnosis solution to monitor the circular progress of companies working in the Balearic Islands' hotel sector.

6.6.3 Maristany project

The Maristany project is included in all three of Alcudia's Secondary Schools' syllabus for students in their 4th year of ESO (Compulsory Secondary Education) taking Applied Science to Professional Activity.

This project sets the basis for carrying out systematic measurements, both physicochemical and biological, in the wetland of Maristany (44 ha). It is an area of particular interest for the town council and its residents interested in preserving this precious ecosystem.

The project's main idea is to be the foundation to continue collecting data to have a continual record through time and thus be able to analyse and assess how the ecosystem is evolving. This will help to take steps to manage this area better.

Since May 2017, every month, the groups of students go on an outing to Maristany to measure the physicochemical parameters with a multiparameter water quality meter provided by the town council. A bird count is made every fortnight.

In 2017, this project won 1st prize in the Francisco José Garcia Palmer Informative Science and Technology video contest, organised by the University of the Balearic Islands.

6.6.4 Circular Economy: Garden Hotels and Hoteles Playa de Muro partnership

The hotel sector has been one of the main sectors to boost sustainable management, turning the waste generated by tourism into resources. This is done by turning the organic waste generated at hotels into ecological compost used as raw material to maintain their garden areas and distribute it among the island's farmers, who hotels buy their fruit and vegetables from—a great example of Circular Economy.

This relevant initiative, initiated in 2017 by Garden Hotels, can be carried out, sustained and improved thanks to partnerships with several NGOs like Amics de la Terra, Estel de Levant, Aubo, APAEMA and Ramon Plana, an expert compost maker, who all helped to produce this special eco-compost. According to this study and depending on each hotel's size, more than 700 kilos of organic waste can be generated a day. This idea arose from an analysis carried out that indicated that each guest produces 0.67 kilos of organic matter per day in a hotel like Playa Garden Selection Hotel Spa in Playa de Muro -with 225 rooms. So, it is estimated that 91,000 kilos of compost could be produced thanks to this hotel.



Playa de Muro hotels have contributed to this initiative by allowing Garden Hotels to use a lot, they are co-owners of, free of charge, to store pruning remains from all of the hotels on the island that want to take part in this initiative. These pruning remains are essential to make the compost mentioned above.

Finally, once this eco-compost has been made and managed, hotels buy their fruit and veg from those same farmers who used the compost. The fruit and vegetables are then used to create ecological, local and slow food dishes for hotel customers at their buffets, therefore completing the process.

6.6.5 Sustainable Activities in the countryside: Jungle Parc



Jungle Parc is an adventure park with zip lines that use forest trees as a resource. There are two Jungle Parcs on the island, Jungle Parc Aventura and Jungle Parc Junior. To ensure these parks' sustainability, periodically and at the company's request, a Forest Engineer comes in and assesses the trees used in both parks.

These studies that have been carried out since 2016 have several objectives:

- To ensure the safety of those using the parks' installations, studying the stability and suitability of the trees used.
- To keep control of the trees' good health, calculating how much each tree has grown in a year, checking to see if there are any pests and making sure there are no physical-mechanical damages to be seen.

The studies carried out propose a series of prevention and improvement measures for borers and processionary moths to ensure the good health of the trees, as well as a series of general recommendations the owners follow and even improve every year.

It should be noted that in all the studies drawn up from 2016 to 2020, the trees assessed in both adventure parks have been deemed SUITABLE for their use.

6.6.6 Wave of Change, Grupo Iberostar

Wave Change is a pioneering movement inspired by Grupo Iberostar. It is based on the elimination of single-use plastics, the promotion of sustainable and responsible fishing and the improvement of coastal health. Thus, Iberostar offers a certified product while also supporting local fishing communities towards a more sustainable way of doing things. The company has set itself five long-term commitments for the next ten years:

- All Iberostar hotels will be free of single-use plastic in all departments and areas by the end of 2020, free of waste by 2025 and carbon neutral by 2030.
- All fish and seafood will come from responsible sources by 2025.
- Iberostar will invest in the health of the ecosystems surrounding all of its hotels committing to having improved them by 2030, increasing the destinations' tourist quality.
- Ninety per cent of all customers staying with Iberostar will know about the Wave of Change movement by 2030, and this will be one of the main factors for sixty per cent of customers choosing Iberostar in 2025.
- Twice as many as the hotels Iberostar has in its portfolio will have adopted Iberostar's responsible tourism certification or that of its verified partners' by 2030.



6.6.7 The Ports' contribution to Mallorca's sustainability

The Balearic Islands' ports, run by the Port Authority of the Balearic Islands (APB for its acronym in Spanish), have set themselves different environmental policy commitments together with a series of initiatives to ensure the sustainability of the destination. Thus, their objectives are to:

- Meet the Balearic Islands' Community's demand in the frame of sustainable development by providing infrastructures and catalyst services to this end, respecting and improving the conditions and natural environment in the ports' surroundings.
- Integrate environmental considerations into infrastructure planning, management, design and implementation operations and the use, surveillance and preservation of the public port domain.
- Protect the port area's marine environment and natural environment, including preventing pollution, ensuring legal compliance and other requirements in all its areas of influence.
- Use available natural resources rationally, minimising their use, applying energy efficiency criteria and preventing climate change.
- Encourage environmental training and education among the institution's staff, and support its employees' professional development, fostering a sense of pride in belonging to the organisation.
- Optimise economic management by protecting and making heritage and the available resources profitable.
- Carry out research and studies on matters related to port activity and environmental protection, and work on them with others.

Examples of outstanding initiatives:

- Air quality monitoring in the island's ports.
- Electric power supply for ships docked at the ports.
- Participation in the CleanPort project, its objective being to demonstrate the viability of a system to generate alternative clean energy in the maritime sector.
- Water quality monitoring.
- Participation in the SAMOA (Meteorological and Oceanographic Support System) project with the definition of specific and general warning alarms.
- Keeping the ports' water clean
- Agreement with the Save the Med Foundation.
- Waste management and monitoring of bins.
- Energy transformation at the terminals.
- Participation in the Green Hysland project. This is the first strategic project in southern Europe, and it will create an «ecosystem of green hydrogen» in the Balearic Islands. Green Hysland will generate, distribute and use at least 300 tons of renewable hydrogen, produced by solar energy, a year in Mallorca. The goal is to reduce CO₂ emissions on the island by up to 20,700 tons per year. The project is also part of the "Hydrogen Roadmap: a commitment to renewable hydrogen" recently approved by Spain's Government, which seeks to position the country as a relevant technological example in the production and use of renewable hydrogen, reaching a production capacity of 4 GW by 2030, and mobilising a total estimated investment of 8,900 million euros.

- Participation in the Balith project, the aim of which is to improve energy storage batteries, also making it possible to store large amounts of energy during long periods. This system will help to save on the costs of the batteries used currently.
- Smart measurement grid (electricity and water)
- Implementation of the Smart Port platform for interconnected, green and smart ports.

6.6.8 Palma de Mallorca Airport's contribution to Sustainability on the island of Mallorca

Palma de Mallorca's Airport is focused on offering optimal levels of service quality and environmental performance. To this end, it has an Energy Efficiency and Environmental Integrated Management Policy and an Integrated Quality and Environmental Management System, certified according to the ISO 9001 and ISO 14001 standards. It also participated in the ACI (Airport Council International) "Airport Carbon Accreditation" programme and obtained level 1 accreditation in 2013. It currently holds level 2 accreditation, and this involves, not only assessing and measuring the carbon footprint but also providing evidence of efficient carbon management, and also includes the definition of objectives and reduction in CO₂ emissions relative to the average emissions of the last three years.

Concerning the fight against climate change, Aena set up its strategy in 2018 to ensure compliance with the Paris Agreement's objectives to prevent the planet's global average temperature increasing more than 2°C compared to the preindustrial times and promote additional efforts to ensure global warming does not exceed 1.5°C.

Recently, and following the European Green Deal, this strategy has been updated, introducing new objectives and initiatives that will allow us to achieve "zero emissions by 2040, based on the following principles:

- Manage the risks and opportunities related to climate change and airport activity.
- Gradually reduce the use of fossil fuels by introducing the production and use of renewable energy to guarantee clean, efficient and safe energy supply.
- Maximise energy efficiency adapting energy consumption to the real use of its facilities.
- Collaborative work with airline companies, handling agents and even shops, employees and the passengers themselves to implement innovative solutions that will allow us to make aviation more sustainable and carbon-free.
- Promote the production and use of sustainable aviation fuels (SAF).

Concerning acoustic impact management, Palma de Mallorca Airport uses a system to monitor noise levels. The general public can access this system through the Web Track application. This application is available on Aena's web site and gives the general public precise and transparent information on aeronautical operations and the corresponding sound levels.

Aena considers a series of intermediate objectives aimed at anticipating the achievement of the environmental goals it initially committed to. Aena's new environmental plan includes three main objectives:

- Raise the proportion of **self-sufficiency** from the seventy per cent initially proposed, to 100 per cent. This will be done by using **photovoltaic energy** inside airport facilities.
- Fulfil the **carbon-neutral programme** four years ahead of time, from 2030 to 2026, where Palma de Mallorca Airport participates in the “**Airport Carbon Accreditation**” programme. Carbon dioxide emissions that cannot be totally eliminated by 2026 will be compensated with projects aimed at absorbing the equivalent amount of CO₂ generated so that the end results are carbon-neutral.
- **Net zero emissions:** meet this objective ahead of time, in 2040 rather than in 2050. In 2019 Aena joined the NetZero2050 initiative, signed by more than 200 airports in twenty-four European countries. Aena has currently committed to accelerating the decarbonisation process by ten years compared to the previous commitment.

It is important to point out that Aena will become the first Spanish company, and one of the first worldwide to submit its *Climate Action Plan* to vote at its shareholders’ meetings. This plan will include appropriate mechanisms to manage, monitor and communicate the company’s decarbonisation objectives.

It should also be noted that in 2021, Aena, and therefore the Palma de Mallorca Airport, will present its Sustainability Strategy including aspects related to the improvement of waste, water, biodiversity, air quality... management. This will be done with an initial global diagnosis that will be carried out in all of Aena’s departments to set up sustainability measures and indicators based on the company’s strategy, policies, current regulation and UNWTO’s Sustainable Development Goals.



7 DATA SOURCES AND MEASUREMENTS FOR TOURISM SECTOR PERFORMANCE

7.1 Data on the tourism sector

AENA collects data relating to passenger arrivals and departures through an agreement signed with IBESTAT and INE for the enhancement and sharing of information. Said data is completed through a series of surveys (FRONTUR and EGATUR) used to distinguish between residents/tourists,/excursionists, etc., determine the nationality of international tourists, and estimate the origin of national tourists, etc. This data also includes tourists' profiles and information about their activities. Other data types are also collected like the human pressure index, energy consumption and occupancy rates.

According to data published by the Government of the Balearic Islands³¹:

- Flight passenger arrivals in the Balearic Islands: 15,916,736 in **2014**; 20,640,255 in **2019**
- Cruises arriving at the Balearic Islands: 961 in **2013**; 1,048 in **2019**.
- Arrival of cruise passengers in the Balearic Islands: 1,538,275 in **2013**; 2,658,472 in **2019**
- Tourist arrivals in the Balearic Islands: 16,453,636 in 2019
- Total tourist spending in the Balearic Islands: 16,510.7 million € in 2019.
- Daily spending per tourist in the Balearic Islands: 150.9€ in 2019
- Accommodation capacity in the Balearic Islands: 2,863 properties and 443,019 beds
- Number and capacity of restaurants in the Balearic Islands: 5,727 properties and capacity for 473,484 people

Several organisations are responsible for collecting data and statistics from Mallorca's tourism sector; those most relevant are AETIB, INE, IBESTAT and the Government of the Balearic Islands' Regional Ministry for Employment, Tourism and Economic Model.

The Balearic Islands' Economy Tourism Satellite Account³² TSA (CST for its acronym in Spanish) with data relating to activity in 2014 was published in 2018.

³¹ 2020, Agència d'Estratègia Turística de les Illes Balears, Conselleria de Model Econòmic, Turisme i Treball. Govern de les Illes Balears.

³² https://ibestat.caib.es/ibestat/noticia/MIO_2014

Tourism activity can be considered a cross-cutting economic activity because it involves several different sectors (accommodation, restaurants, transport, car rental, travel agencies, etc.), and its users (visitors) purchase both tourist and non-tourist goods and services. The Tourism Satellite Account is a statistics tool designed to measure these goods and services following international standards that allow valid comparisons with other industries and regions. The official RMF 2008³³ methodology established by UNWTO, the UN, Eurostat and OCED is used in this process. This methodology helps measure tourism's economic impact in a specific region using indicators like tourism contribution to its GDP or its employment. It enables the identification of economic activities that produce goods and services intended for tourists.

In Spain, the organisation responsible for elaborating the national STA is INE (the National Statistics Institute).

According to UNWTO's 2020 initiative on Measuring the Sustainability of Tourism³⁴ (MST), the Statistical Framework for MST (SF-MST) is a valuable tool for countries to produce credible, comparable and integrated data to better guide decisions and policies relevant to sustainable tourism. The challenges behind implementing MST are: funding, a lack of political support or interest, and a lack of methodological guidance and technical skills. According to this same report, it will be the development of international and regional skills and technical cooperation that will help provide better data for more sustainable tourism.

³³ Tourism Satellite Account: Recommended Methodological Framework, 2008 (UN, UNWTO, EUROSTAT and OCED) - RMF-2008 (https://unstats.un.org/unsd/publication/seriesf/seriesf_80rev1e.pdf)

³⁴ Measuring the Sustainability of Tourism (MST) initiative. Experiences from pilot studies in measuring the sustainability of tourism: a synopsis for policy makers. UNWTO, September 2020.

7.2 Tourism Industry Revenue and Employment

Data on Mallorca's tourism industry's organisation and structure is monitored, collected and accessible. This information is published annually by the Regional Government of the Balearic Islands in its Tourism Yearbook³⁵.

It includes the information corresponding to the Balearic Islands' Economic Tourism Satellite Account (TSA) published in 2018 with data from 2014.

The annual Tourism Yearbook presents a series of indicators, including data on the employment market relevant to tourism in Mallorca. Among others its lists:

- The number of people covered by Spain's Social Security scheme and their distribution by sector of activity, period and island (season).
- The number of people employed for less than one year in the tourism sector by period.
- The temporary employment rate of employees in the tourism sector by period
- The number of people employed and how they are distributed by sector of activity and period.

³⁵ http://www.caib.es/sites/estadistiquesdelturisme/es/anuaris_de_turisme-22816/

7.3 Financial Indicators

Mallorca's economy is highly developed and relies heavily on the tertiary sector that provides services, in this case those mostly related to tourism, that represents 44.8 per cent of its GDP and 32 per cent of employment (Exceltur 2018). In 2017 alone, a total 16,332,033 tourists (Ibestat 2018) travelled to Mallorca. The island ranks 7th in the Autonomous Communities' GDP ranking per capita, which means that in general its people have a good standard of living in comparison to other autonomous communities and this is why people from mainland Spain emigrate to Mallorca.

Mallorca has a great deal of experience in the tourism industry and is home to leading hotel chains: Meliá, Barceló, RIU, among others (Hosteltur 2018). Tourists mostly visit coastal towns like Calvià, Magaluf, el Arenal, Alcúdia, Cala Rajada, etc. However, in recent years and primarily due to tourism seasonality, political stakeholders have been putting a great deal of effort into diversifying their tourism products.

7.4 Key Markets and Revenue

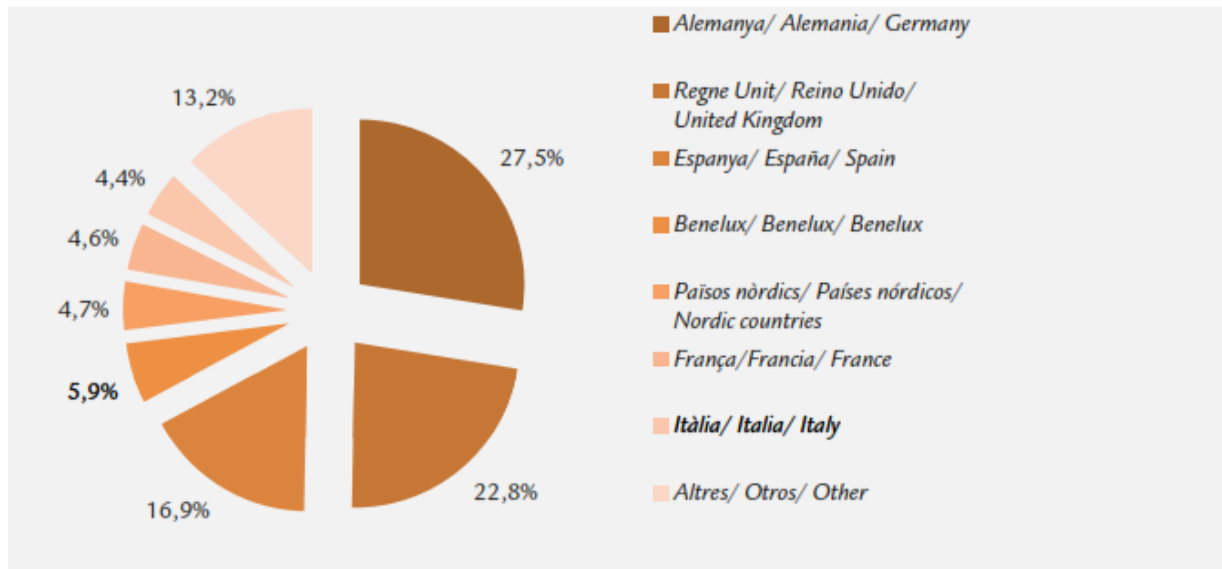
Air passenger arrivals by year and country of origin (2014-2019)

COUNTRY	2014	2015	2016	2017	2018	2019
Spain	4.327.614	4.756.840	5.024.888	5.445.888	5.979.807	6.273.393
EEA*	11.468.210	11.649.400	13.241.200	14.037.640	14.165.753	14.230.119
Germany	4.519.432	4.425.300	4.951.890	5.076.212	5.311.823	5.385.495
Austria	242.028	243.263	253.842	239.859	319.073	358.682
Belgium	208.091	237.615	244.128	235.642	219.350	221.662
Bulgaria	7.720	6.743	6.863	7.857	7.655	7.352
Denmark	224.768	228.555	273.197	304.934	304.388	245.271
Slovakia	14.464	16.095	18.266	22.068	19.654	13.538
Estonia	910	891	1.042	908	615	1.320
Finland	46.478	41.098	43.516	66.945	69.897	56.583
France	399.550	446.983	510.322	572.453	625.391	667.870
Greece	481	276	1.633	419	434	3.817
Hungary	8.912	9.855	14.389	14.905	13.603	20.758
Ireland	124.448	123.581	143.087	148.529	150.674	179.181
Island	779	10.662	3.582	1.643	2.443	323
Italy	598.946	622.578	721.192	765.520	785.248	795.646
Latvia	2.052	1.939	2.146	2.550	3.515	6.648
Liechtenstein	0	0	0	2.307	0	0
Lithuania	13.747	13.389	14.907	20.949	15.272	13.268
Luxembourg	36.708	47.808	51.142	43.339	57.917	63.143
Malta	31	161	165	92	147	1.112
Norway	178.558	148.668	178.595	201.200	195.318	149.240
Netherlands	332.014	353.397	489.223	571.629	578.204	574.974
Poland	61.679	75.038	103.618	121.445	142.293	125.852
Portugal	79.800	85.406	72.602	64.312	77.196	92.195
United Kingdom	3.12.753	3.619.668	4.108.322	4.418.418	4.215.492	4.261.753
Czech Republic	42.221	51.164	68.609	69.729	66.491	71.872
Sweden	262.770	273.219	340.272	384.157	373.983	307.623
Switzerland	534.928	560.381	618.233	670.725	598.228	591.910
Cyprus	0	10	28	17	42	37
Others	120 912	70 905	98 234	108 521	104 606	136 743
TOTAL	15 916 736	16 477 145	18 363 643	19 592 049	20 250 166	20 640 255

*European Economic Area

Source: The Balearic Islands' Tourism Strategy Agency, 2020

Its top five markets are: Spain, Germany, the United Kingdom, Italy and France. Together, these five markets represent 84.2 per cent of Mallorca's total tourist arrivals.



Picture 11 – Distribution of tourist arrivals – country of residence

Source: Balearic Islands 2019 tourism Yearbook, AETIB, 2020.

Despesa dels turistes segons illa de destinació (2019)

Gasto de los turistas según isla de destino (2019)

Expenditure of tourists according to island of destination (2019)

	MALLORCA		MENORCA		EIVISSA-FORMENTERA		ILLES BALEARS	
	2019	%VAR. 19/18	2019	%VAR. 19/18	2019	%VAR. 19/18	2019	%VAR. 19/18
Despesa total (milions €)/ Gasto total (millones €)/ Total expenditure (millions €)	12.026,0	2,2%	1.374,5	-0,9%	3.110,3	-0,3%	16.510,7	1,4%
Despesa diària per persona/ Gasto diario por persona/ Daily expenditure per person (€)	150,0	3,2%	133,9	3,3%	163,5	2,7%	150,9	3,1%

Top markets³⁶:

- **Germany:** In 2019, 4,529,629 Germans visited the Balearic Islands and spent 4,599 million euros, making Germany the destination's main international market. The average daily expenditure per person was € 151.3.
- **United Kingdom:** In 2019, 3,748,976 English people travelled to the Balearic Islands and spent 3,855.5 million euros. The average daily expenditure per person was € 155.5.
- **Italy:** In 2019, 725,842 Italians travelled to the Balearic Islands and spent 693.4 million euros. The average daily expenditure per person was € 151.1.
- **France:** In 2019, 760,016 French visited the Balearic Islands and spent 787.2 million euros. The average daily expenditure per person was € 147.4.
- **Benelux:** In 2019, 966,317 visitors from Benelux visited the islands and spent 1,092.6 million euros. The average daily expenditure per person was € 169.

³⁶ AETIB, 2019.



8 TOURISM PERFORMANCE

8.1 Accommodation

According to data from AETIB³⁷, in 2019, the Balearics totalled 443,019 beds distributed in 2,863 properties. Mallorca accounts for the vast majority of this offer with 303,566 beds (68.5 per cent of the total) and 1,795 properties. The different types of accommodation on the Balearic Islands are the following:

- **(A) Tourist Apartments:** properties that provide a tourist accommodation service, advertised as such, made up of different accommodation units in the same block with furniture, amenities, services and appliances to keep, make and eat and drink food. Tourist Apartments must be ready to occupy following the requirements established by law.
- **(AG) Agrotourism:** properties that provide tourist accommodation services located in buildings built before January 1st, 1960. These properties must be on rural land and on plots of at least 21,000 square meters, and they must be working agricultural, livestock or timber farms.
- **(CH) Guest Houses:** lodgings that may or may not provide breakfast, as well as cafeteria services. In the latter case, these services must be rendered independently from that of the accommodation service.
- **(CT) Tourist campsites:** demarcated areas set up and conditioned to be occupied temporarily with room for at least ten people who intend to spend a lot of time outdoors and use mobile lodgings, tents, caravans, etc.

³⁷ "El Turisme a les Illes Balears, Anuari 2019". AETIB, 2020.

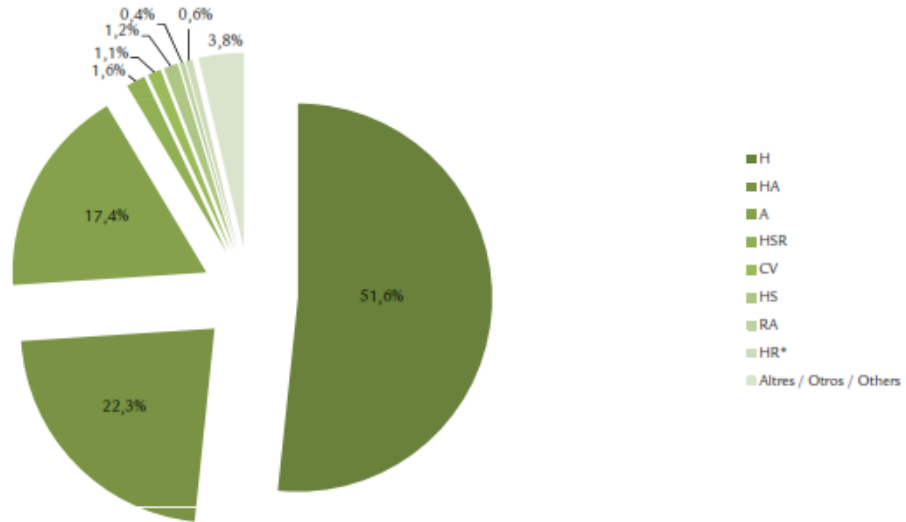
- **(CV) Holiday Villages (*Ciudad de Vacaciones*):** accommodation that given its location, facilities, and services allows people to enjoy their holidays in direct contact with nature. These properties offer full-board accommodation and the possibility of doing sport and taking part in group leisure activities. Non-profit Holiday villages run by corporations of public organisations for social assistance are excluded. Star rating classification system: 1, 2 and 3 stars (*).
- **(F) Inns (*Fonda*):** a type of hotel accommodation that without being able to be classified as a hotel, hostel or apartment hotel, meets, at least, the following conditions:
 - a) Rooms. Double rooms must be at least ten square meters and single rooms, six square meters. The height from the floor to the ceiling must not be less than 2.50 meters.
 - b) The establishment must have at least one restroom with a shower, sink, and WC.
 - c) Dining room. This area must have at least one square meter per room.
- **(H) Hotels:** properties used to provide tourist accommodation services, with or without supplementary services that take up all or an independent part of a building or a group of buildings. Its rooms are private units and constitute a homogeneous whole with their own separate entrances. They also comply with other standards. Hotel lifts and stairways must be for the exclusive use of the hotel. Star rating classification system: 1, 2, 3, 3 superior, 4, 4 superior, 5, 5 Grand-Luxe (*).
- **(HA) Apartment Hotels:** accommodation that as well as complying with the requirements established for hotels, also has all the necessary facilities to keep, make and eat and drink food and drinks inside some or all of its units. It must also follow other regulated standards. Star rating classification: 1, 2, 3, 3 superior, 4, 4 superior, 5, 5 Grand-Luxe
- **(HO) Hostelries (*Hospedería*):** accommodation that is part of a church, chapel or sanctuary.
- **(HR*) Residence Hotels (*Hotel Residencia*):** hotels that do not offer dining services. They may offer breakfast and cafeteria services, but in the latter, these services must be rendered independently from that of the accommodation services: Star rating classification system: 1, 2, 3, 4 or 5 stars (*).
- **(HR) Rural Hotels:** properties that provide tourist accommodation services, located in buildings built before January 1st, 1940. These properties must be on rural land and on plots of at least 49,000 square meters.
- **(HS) Hostels:** properties that provide both accommodation and restaurant services. Customers decide if they want full-board or not, except for at residence hostels. Star rating classification system: 1, 2, or 3 stars (*).
- **(HSR) Residence Hostels (*Hostales Residencia*):** Hostels that may or may not offer breakfast and cafeteria services, but in the latter, these services must be rendered independently from that of the accommodation services. Star rating classification system: 1, 2, 3 or 4 stars (*).
- **(PENS) Boarding Houses (*Pensión*):** properties with less than twelve rooms that usually offer full-board. Star rating classification system: 1, 2, or 3 stars (*).
- **(RA) Residence Apartments (*Residencia apartamento*):** hotel apartments that may or not offer breakfast and cafeteria services, but in the latter, these services must be rendered independently from that of the accommodation services. Star rating classification system: 1, 2, 3, 4 or 5 stars (*).
- **(TI) Inland Tourism:** properties that provide tourist accommodation services in buildings in the old parts of towns and cities, usually in listed buildings or those built before January 1st, 1940.

Hotels, Apartment Hotels and Tourist Apartments account for 91.3 per cent of the Balearic Islands offering.

Distribució de la capacitat d'allotjament segons tipus d'establiment a les Illes Balears (2019)

Distribución de la capacidad de alojamiento según tipo de establecimiento en las Islas Baleares (2019)

Distribution of accommodation capacity according to type of establishment in the Balearic Islands (2019)



Source: Tourism in numbers, 2019 Yearbook. AETIB, 2020.



8.2 Tourism Offering

8.2.1 Restaurants

Similar to the islands' accommodation offering, most restaurants (66 per cent) are on the island of Mallorca: 3,905 restaurants and 313,786 restaurant seats in 2019.

Nombre i capacitat dels restaurants a les Illes Balears (2018-2019)
Número y capacidad de los restaurantes en las Islas Baleares (2018-2019)
Number and restaurant capacity in the Balearic Islands (2018-2019)

ILLA ISLA ISLAND	2018		2019		% VAR. 19/18	
	ESTABLIMENTS ESTABLECIMIENTOS ESTABLISHMENTS	PLACES PLAZAS PLACES	ESTABLIMENTS ESTABLECIMIENTOS ESTABLISHMENTS	PLACES PLAZAS PLACES	ESTABLIMENTS ESTABLECIMIENTOS ESTABLISHMENTS	PLACES PLAZAS PLACES
MALLORCA/ MALLORCA/ MAJORCA	3.849	305.938	3.905	313.786	1,5%	2,6%
MENORCA/ MENORCA/ MINORCA	524	40.034	544	41.743	3,8%	4,3%
ENISSA/ IBIZA/ IBIZA	1.060	99.537	1.142	107.904	7,7%	8,4%
FORMENTERA/ FORMENTERA/ FORMENTERA	126	9.370	136	10.051	7,9%	7,3%
Total	5.559	454.660	5.727	473.484	3,0%	4,1%

Evolució dels restaurants a les Illes Balears (2010-2019)
Evolución de los restaurantes en las Islas Baleares (2010-2019)
Evolution of the restaurants in the Balearic Islands (2010-2019)

ANY AÑO YEAR	ESTABLIMENTS ESTABLECIMIENTOS ESTABLISHMENTS	PLACES PLAZAS PLACES
2010	4.589	328.185
2011	4.618	339.393
2012	5.122	384.646
2013	5.274	399.440
2014	5.259	408.436
2015	5.292	415.486
2016	5.404	433.484
2017	5.513	447.738
2018	5.559	454.660
2019	5.727	473.484

Source: Tourism in numbers. 2019 Yearbook. AETIB, 2020.

8.2.2 Bars and Cafés

Nombre i capacitat dels bars-cafeteria a les Illes Balears (2018-2019)
Número y capacidad de los bares-cafetería en las Islas Baleares (2018-2019)
Number and capacity of the bar-cafeterias in the Balearic Islands (2018-2019)

ILLA ISLA ISLAND	2018		2019		% VAR. 19/18	
	ESTABLIMENTS ESTABLECIMIENTOS ESTABLISHMENTS	PLACES PLAZAS PLACES	ESTABLIMENTS ESTABLECIMIENTOS ESTABLISHMENTS	PLACES PLAZAS PLACES	ESTABLIMENTS ESTABLECIMIENTOS ESTABLISHMENTS	PLACES PLAZAS PLACES
MALLORCA/ MALLORCA/ MAJORCA	5.746	284.720	5.815	292.555	1,2%	2,8%
MENORCA/ MENORCA/ MINORCA	724	36.200	736	37.282	1,7%	3,0%
ENISSA/ IBIZA/ IBIZA	1.120	73.580	1.177	76.560	5,3%	4,1%
FORMENTERA/ FORMENTERA/ FORMENTERA	103	5.017	104	5.082	1,0%	1,3%
Total	7.693	399.470	7.832	411.479	1,8%	3,0%

Evolució dels bars-cafeteria a les Illes Balears (2010-2019)
Evolución de los bares-cafetería en las Islas Baleares (2010-2019)
Evolution of the bar-cafeterias in the Balearic Islands (2010-2019)

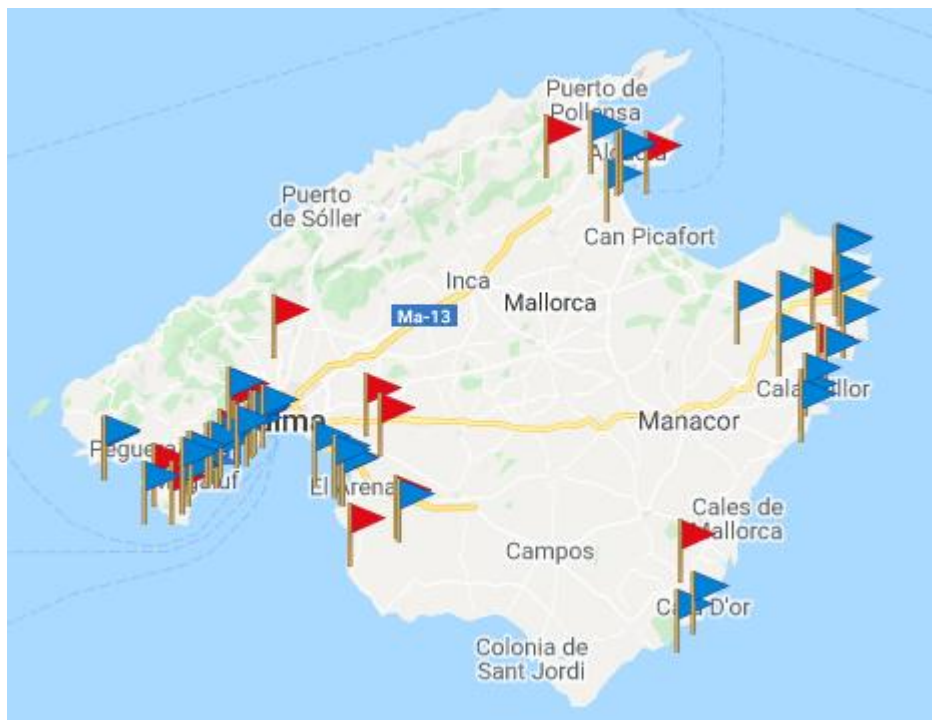
ANY AÑO YEAR	ESTABLIMENTS ESTABLECIMIENTOS ESTABLISHMENTS	PLACES PLAZAS PLACES
2010	6.809	307.053
2011	6.549	305.848
2012	7.230	345.028
2013	7.434	362.220
2014	7.412	369.321
2015	7.446	370.068
2016	7.480	375.933
2017	7.458	384.119
2018	7.693	399.470
2019	7.832	411.479

Source: Tourism in numbers. 2019 Yearbook. AETIB, 2020.

8.2.3 Golf Courses

Golf is a very important sport on the island and helps to offset the seasonal effects of tourism. Mallorca has twenty-three golf courses spread around the island.

According to a study carried out in 2018 by the Impulsa Foundation and promoted by the Balearic Golf Federation and the Mallorca Golf Courses' Association, Mallorca's golf courses generated an annual economic impact of 166.94 million euros and that is without counting what golfers spent outside of the golf courses, in other productive sectors on the island.



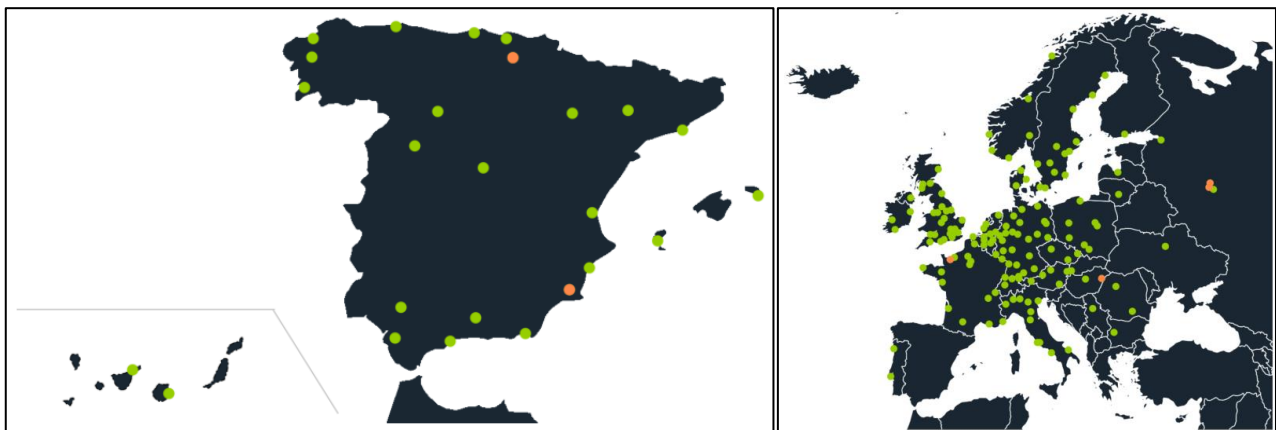
Picture 12 – Map of Mallorca's Golf Courses

8.3 Transport

8.3.1 Air Traffic

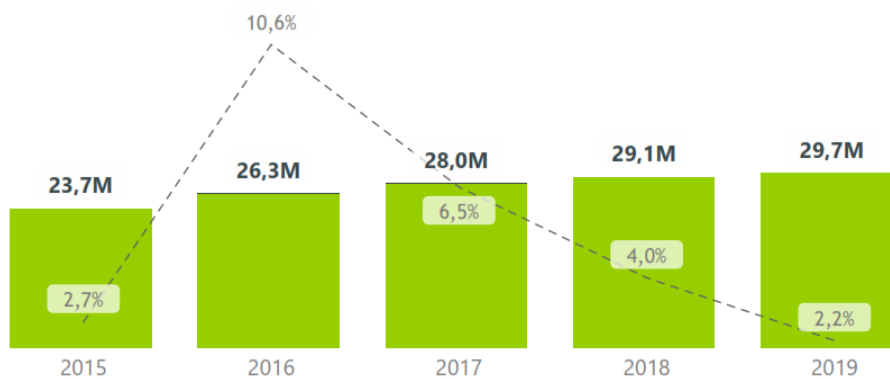
Palma de Mallorca Airport (Son Sant Joan airport) is Spain's third most important airport surpassing 29 million passenger movement in 2019. More than sixty airline companies operate at this airport and have more than forty-nine direct flight connections (41 to foreign countries and 8 to national destinations). Airport traffic is mainly international and reaches its highest levels during the summer months. Traffic to and from mainland Spain is also relevant. Most important air links are Barcelona, Madrid-Barajas, Dusseldorf and Frankfurt. By nationalities, German travellers represent the highest passenger movements, followed by Spanish and British visitors.

According to data provided by AENA³⁸, in 2019, Son Sant Joan airport closed the year with a total 29,721,123 passengers, 217,218 operations and 9,021 tons of goods. The airport has connections with a total 175 destinations (25 national, 148 European and 2 African ones). The picture below shows national and European destinations that have flight connections with the airport (those in orange are new destinations).



Palma de Mallorca airport connectivity, 2019

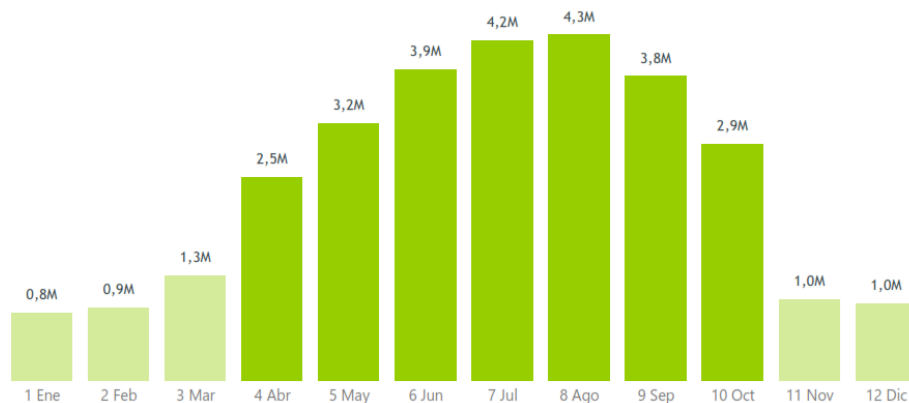
Source: AENA, 2019



Year-on-year evolution of passenger traffic at Palma airport

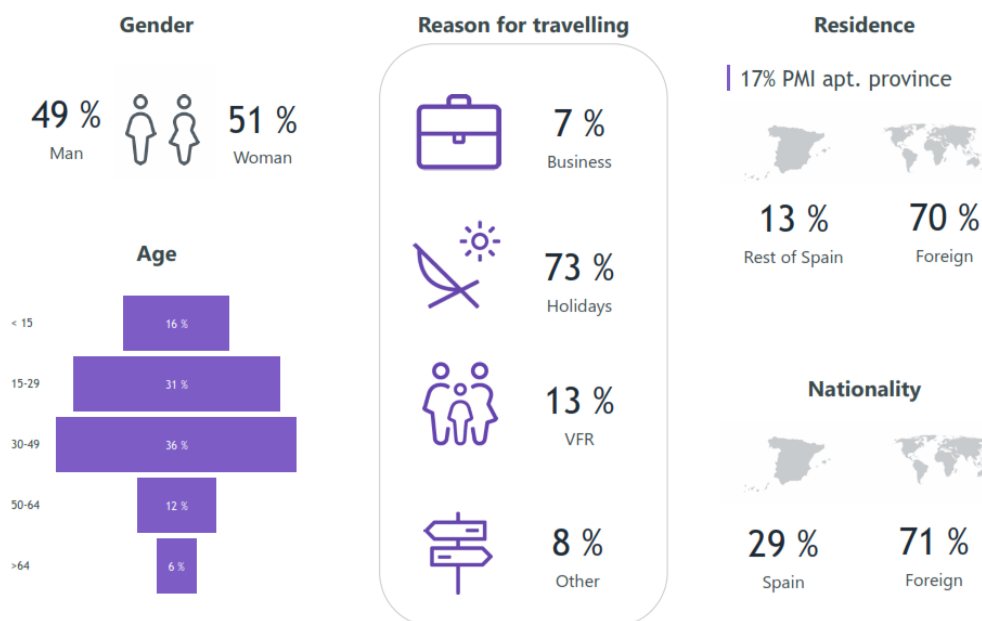
³⁸ AENA, Monitor de rutas 2019 PMI.

Source: AENA, 2019



Monthly seasonality of passenger traffic (2019)

Source: AENA, 2019



Profile of passengers at Palma airport

Source: Aena surveys EMMA 2018

8.3.2 Cruises

The Port of Palma, in the city, right in front of Palma's Old Town, has become one of the most important ports for cruise traffic in all of the Mediterranean, welcoming in 2018 a total 1,997,243 cruise passengers, according to data provided by AETIB and APB.

Palma Port is the largest of the five ports run by the Balearic Islands' Port Authority, *Port de Balears* (Palma, Alcudia, Ibiza, Mahon and La Sabina). Palma port has connections with Ibiza, Mahon, Valencia and Barcelona. Ibiza and Palma ports welcome more cruise passengers than all other ports in the Balearic Islands, having

welcomed in 2018 more than two million cruise passengers, representing an increase of 23.5 per cent compared to 2017.

With reference to passenger traffic, according to information included in the 2018 sustainability report published by APB, of the 6,504,315 passengers travelling to the Balearic Islands on scheduled liners in 2018, 15.3 per cent arrived at Palma port while 7.6 per cent arrived at Alcudia. This figure indicates that compared to other ports like Ibiza with almost 3,000,000 passengers arriving on scheduled liners in 2018 or La Sabina with just over 2,000,000, both Palma and Alcudia have a very low representation in terms of scheduled passenger traffic.

However, when analysing passenger traffic arriving on tourist cruises in 2018, Palma Port gains weight since of the 2,430,149 passengers travelling to the Balearic Islands on tourist cruises, 82 per cent arrived at the Port of Palma.



8.3.3 Public Transport

Public transport on the island of Mallorca:

- 150 intercity bus lines: TIB³⁹
- 31 city bus lines in Palma: EMT⁴⁰
 - Around 40.5 million passengers movements a year in Palma.
 - 178 buses

³⁹ <https://www.tib.org/en/web/ctm/inici>

⁴⁰ <http://www.emtpalma.cat/en/home>

- It directly or indirectly operates 29 routes, offering services to the city of Palma and nearby municipalities like Marratxi, Calvià and Lluçmajor.
- Two metro lines: Metro UIB, Metro Marratxi
- Three train lines: Inca, Sa Pobla and Manacor
- A public bike-sharing service to move around Palma⁴¹

8.3.4 Road Traffic

Mallorca's roads see around **1,147,651 car, lorry and motorbike journeys** a day (2018). This figure comes from the Average Daily Traffic Intensity (ADTI) measuring the Mallorca Island Council carries out on the island's main roads and their busiest stretches. This number reveals that there is a major problem with traffic on the island, especially in summer. And all of this taking into account this total does not include journeys made within cities, towns or villages.



The Balearic Islands' vehicle population is over **one million registered vehicles**, most of them on Mallorcan roads. With 900,000 inhabitants, Mallorca has almost one car for every resident. However, these findings may be misleading because, to the total number of private vehicles, we must add the more than 100,000 rental vehicles on the roads in summer months. Rental cars exponentially increase the Average Daily Traffic Intensity on the island's roads and motorways.

Likewise, the great number of lorries and vans that arrive by boat to deliver goods must also be added. The number of vehicles per inhabitant on the island of Mallorca is one of the highest in Spain.

⁴¹ <http://www.mobipalma.mobi/es/mobilitat/transport/bus-emt/>

ANNEX I A DETAILED DESCRIPTION OF THE INDICATORS THE MALLORCA STO WILL MONITOR

The information on data sources, included in the tables is merely descriptive. The Mallorca STO will carry out an initial detailed analysis by groups of indicators and individual KPIs, showing which indicators are official, from the Balearic Islands' Statistics System, SESTIB (for its acronym in Spanish), which KPIs are calculated by STO stakeholders and which indicators are or will be specific to the Mallorca STO.

ANX.1.1 SETS OF MANDATORY INDICATORS

ANX.1.1.1 Local satisfaction with tourism

The Balearic Islands' Tourism Strategy Agency, AETIB, a stakeholder of Mallorca's STO, carries out a biannual survey to determine residents' attitude towards tourism activity on the islands. The basic objective of this survey is to follow the European Tourism Indicators System (ETIS), proposed by the European Commission to take a sustainable approach to destination management:

- "Percentage of residents who are satisfied with tourism in the destination (C.1.2)
- "Percentage of residents who are satisfied with the impacts of tourism on the destination's identity" (C.5.1)

A sample survey is used for the Balearic Islands stratifying the population depending on whether they live in a tourism/non-tourism municipality, +/-20,000 inhabitants, age groups and sex according to the municipal registers of 2017. A total of 1,950 people were surveyed by telephone.

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Degree of local satisfaction with tourism	Percentage of residents who are satisfied with tourism in the destination	Y / A	AETIB	69% (2018)
	Percentage of residents satisfied with the impacts of tourism on the destination's identity and life's quality	Y / A	AETIB	68% (2018) Contributes to keep it or improve it
Community attitude toward tourism	Local satisfaction with tourism, local culture, integrity, authenticity and with other specific components of tourism	Y / A	AETIB	77.4% (2018) Contributes to keep it or improve it
	Number of complaints by local residents related to tourism (UNWTO)	N		
Visitor – resident ratio	Number of tourists and visitors per 100 residents (ETIS)	Y / A	FRONTUR and Population figures from IBESTAT	
	Number of beds available in commercial accommodation per 100 residents (ETIS)	Y / A	Tourist accommodations Catalog, AETIB	

	Number of second homes per 100 homes (ETIS)	Y / A	Population census, IBESTAT	
	Number of tourists per km2, ratio of tourists to locals (UNWTO)	Y / A	FRONTUR , Surface IBESTAT and SITIBSA	
	Ratio of tourists to locals at events, ceremonies (UNWTO)	N		
Social benefits associated with tourism	Number of services, infrastructure, architecture preserved, provided for residents attributable to tourism (UNWTO)	N		
Housing issues	Price of real estate in the destination (UNWTO)	A	TINSA, real state portals	
	Percentage of housing affordable for residents (UNWTO)	A	Regional Ministries Urban planning, Energy and mobility	
	Percentage of increase/decrease in land and housing prices over time (UNWTO)	Y / A	Housing prices, INE	
	Percentage of construction and new housing available for living purposes (for the local population) (UNWTO)	A	College of Architects	
	Percentage of construction and new housing available for tourism (UNWTO)	A	College of Architects	
Economic barriers	Availability and access to goods and services (health, water, transport, food, accommodation etc.) for residents/availability and access to goods and services for tourists (UNWTO)	A	F. Impulsa	
	Cost of access (entry) to important attraction sites expressed in hours work at local wage (UNWTO)	A	AETIB	
Quality of neighbourhoods	Noise and congestion levels caused by tourism near residential areas (UNWTO)	A	Municipalities	

ANX.1.1.2 Economic Benefits at Destination Level

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Business investment in tourism	<ul style="list-style-type: none"> ▪ Number of tourism businesses in the community and % owned locally ▪ Asset value of tourism businesses ▪ Longevity of tourism businesses 	Y	CAEB, F. Impulsa	
Tourism flow	Number of tourist nights per month (distinguishing domestic and international tourists classified by main countries of residence) (ETIS) (InRouTe)	Y / A	EGATUR, IBESTAT	
	Number of same-day visitors per month (ETIS)	A	APB	

Revenues generated by tourism	Relative contribution of tourism to the destination's economy (% GDP) (ETIS) (UNWTO)	Y / A	CST BALEARES , AETIB	
	Daily spending per overnight tourist (ETIS)	Y / A	EGATUR, IBESTAT	
	Daily average expenditure by tourists (InRouTe)	Y / A	EGATUR, IBESTAT	
	Daily spending per same-day visitor (ETIS)	Y / A	APB	72€
	Total fees collected by the destination for the access and use of attractions (UNWTO)	N	AETIB, F. Impulsa	
	Public revenue from tourism business permits, licenses, concessions and taxation compared to visitor arrivals (UNWTO)	A	AAPP	
Tourism 130enterprise(s) performance	Average length of stay of tourists (nights) (ETIS)	Y / A	EGATUR, IBESTAT	
	Occupancy rate in commercial accommodation per month and average for the year (ETIS)	Y / A	EEOO, IBESTAT Partial	
	Occupancy rates in accommodation establishments (UNWTO)	Y / A	EEOO, IBESTAT Partial	
Vitality of the local tourism industry	Number of tourism-related enterprises (establishments) (categorized by size and type) (UNWTO)	Y / A	Business demographics	
	Percentage of tourism involved businesses owned locally/externally (UNWTO)	A	AETIB, F. Impulsa	
	Asset value of tourism businesses and percentage owned locally (UNWTO)	A	AETIB, F. Impulsa	
	Birth rate of enterprises/establishments in the tourism sector (InRouTe)	Y / A	Business demographics	
	Longevity of tourism businesses (rate of turnover) (UNWTO)	A	CEOE, Chamber of Commerce	
	Annual profits of tourism businesses (UNWTO)	A	CEOE, Chamber of Commerce	
	Tourism business revenues (growth rates) (UNWTO)	A	AETIB	
Impacts of tourism on local income	Ratio of income attributable to tourism versus other income generating activities (UNWTO)	A	F. Impulsa	
Competitiveness of tourism businesses	Cost/price ratios (including gross margin) of tourism businesses (accommodation, attractions, tours, packages, etc.) compared to industry norms or ratios for similar products at other destinations (UNWTO)	A	AETIB, F. Impulsa	
	Percentage of tourism businesses participating in cooperative marketing (UNWTO)	A	AETIB; F. Impulsa, FMT	
	Percentage of marketing expenditures in cooperative initiatives (UNWTO)	A	AETIB; F. Impulsa, FMT	

ANX.1.1.3 Employment, HR/Labour

This section includes information on the characteristics and main figures relating to Mallorca's labour market and the weight the tourism sector has on this market. The selection of indicators allows us to have a broad view as it includes indicators taken from official statistics together with data from companies, unions, foundations and associations:

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Quantity and quality of employment	Number and percentage of tourism employees by industry (accommodation, restaurants, other tourism industries) compared to total employment in the destination (ETIS)	Y / A	TGSS, IBESTAT	
	Percentage of jobs in tourism that are seasonal (ETIS)	Y / A	TGSS, IBESTAT	
	Ratio of part-time to full-time employment in tourism (UNWTO)	Y / A	TGSS, IBESTAT	
	Percentage of tourism employees who are locals (UNWTO)	A	Trade Unions	
	Percentage of jobs that are full time, full year (UNWTO)	Y / A	TGSS, IBESTAT	
	Local unemployment rate in low, off, shoulder and peak seasons (UNWTO)	Y / A	SOIB + Population figures, IBESTAT	
	Retention levels of employees in the tourism sector (percentage of turn over) (UNWTO)	A	SOIB	
	Average tourism wages compared to the average wage in the destination (UNWTO)	A	EPA, turijobs.com	
	Income levels (absolute and compared with other sectors) (UNWTO)	A	IBESTAT	
	Average wages and salary income corresponding to the different job categories in tourism (accommodation, etc.) (InRouTe)	A	F. IMPULSA, turijobs.com	
	Employee satisfaction (UNWTO)	A	F. Impulsa / Trade Unions	
	Weekly working hours and workday sequences in tourism jobs	A	F. Impulsa / Trade Unions	
	Ratio of time dedicated to working in tourism versus income from tourism (income per hour worked) (UNWTO)	A	F. Impulsa / Trade Unions	
	Employment rate of tourism-related service jobs: local vs not local employees	A	IBESTAT	
	Employee satisfaction with tourism-related service jobs (freely based on ZTS 2030)	A	IBESTAT	
Gender equality in tourism	Percentage of men and women employed in the tourism sector (ETIS) (UNWTO)	Y / A	TGSS, IBESTAT	

	Percentage of tourism enterprises where the general manager position is held by a woman (ETIS)	A	CAEB, F. Impulsa	
	Female average income/male average income in the tourism sector (or: percentage of women/men in different tourism income-earning categories) (UNWTO)	A	IBESTAT	
	Percentage of women/men in unskilled, semi-skilled and professional positions in the industry (UNWTO)	A	IBESTAT	
	Percentage of tourism businesses registered under women/men or owned by women/men (UNWTO)	A	CAEB, F. Impulsa, Trade Unions	
	Female labour participation	A	IBESTAT	
Access of tourism employees to health and safety	Percentage of tourism sector employees receiving free/subsidized health checkups and clinics for staff and family members (UNWTO)	A	IBESTAT Af. Social Security	
	Percentage of tourism sector employees receiving health insurance sponsored/subsidized by the employer (UNWTO)	A	CAEB, Trade Unions	
Family support for tourism employees	Percentage of workplaces in the tourism sector providing child care facilities (UNWTO)	A	CAEB, Trade Unions	
	Percentage of workplaces with family-friendly rostering (work shifts and rotation) (UNWTO)	A	CAEB, Trade Unions	
	Existence of initiatives that focus on family-friendly working conditions (Guidebook STGD)	A	CAEB, Trade Unions	
Education, training, capacity development in tourism	Percentage of employees qualified/certified (UNWTO)	A	IBESTAT	
	Training funds spent per employee in the tourism sector (UNWTO)	A	CAEB, FEHM, Trade Unions	
	Number of scholarships and training opportunities in tourism for the youth (UNWTO)	A	SOIB, F. Impulsa	
	Number of educational programs/institutions in the destination incorporating sustainable tourism into their curricula (UNWTO)	Y / A	UIB	
	Number of qualification programs publicized to tourism stakeholders by the DMO per year (Guidebook STGD)	A	FMT	
	Number of training and continuing education courses offered per DMO associate per year and percentage of these on sustainable development (Guidebook STGD)	A	FMT	
	Number of educational programs in tourism (for trainees/students) and trainings on the job for lifelong learning (employees/entrepreneurs) incorporating foreign languages (apart from English),	A	UIB, FUEIB	

	regional knowledge and digital capacity in their curricula			
	Percentage of tourism enterprises with employees receiving training	A	CAEB, F. Impulsa, Trade Unions	
	Percentage of labour force trained in higher tourism-related quality services, in fields such as health treatments or nature experience	A	F. Impulsa	

ANX.1.1.4 Tourism Seasonality

Here we include indicators to analyse how seasonality evolves and how challenges are faced. The table also shows the outcomes of the initiatives being carried out by different social stakeholders in source markets and on the availability of connections, attractions, events and activities in the destination:

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Degree of seasonality	Degree of seasonality	Y / A	Monitor FEHM, F. Impulsa, IBESTAT	
	Tourist arrivals by month or quarter (distribution throughout the year) (UNWTO)	Y / A	FRONTUR, IBESTAT	
	Percentage of annual tourist arrivals occurring in peak month, in peak quarter (UNWTO)	Y / A	FRONTUR, IBESTAT	
	Ratio of number of tourists in peak month to lowest month (UNWTO)	Y / A	FRONTUR, IBESTAT	
	Occupancy rates for accommodation by month or quarter (distribution throughout the year) (UNWTO)	Y / A	EEOO, IBESTAT Partial	
Strengthen shoulder season and low season tourism	Percentage of tourism authority budget spent promoting off-peak and shoulder seasons (UNWTO)	Y / A	CIM, FMT, F. Impulsa (iCTe.1,e.2 e iCTe.3)	
	Number of facilities offering alternative activities during shoulder and low season (capacity and use levels per activity type) (UNWTO)	A	FEHM, AETIB	
	Percentage of main attractions open in shoulder/off-seasons (UNWTO)	A	FEHM, AETIB	
	Special events held during peak, shoulder and off-seasons (number of events, participants) (UNWTO)	A	Congress Center, AETIB, FMT	

Provision of sufficient infrastructure, services and products year-round Seasonality and employment	Percentage of accommodation and tourism-related services open all year (UNWTO)	Y / A	EEOO, IBESTAT Partial	
	Percentage of tourism-related employment which is full-year, less than six months etc. (UNWTO)	Y / A	TGSS, IBESTAT	
	Local unemployment rate in low, off, shoulder and peak seasons (UNWTO)	Y / A	SOIB + population figures, IBESTAT	
Provision of sufficient infrastructure year-round (especially services for tourists in high season and local communities in low season)	Percentage of annual tourist arrivals occurring in peak month, in peak quarter (UNWTO)	Y / A	FRONTUR, IBESTAT	
	Ratio of number of tourists in peak month to lowest month (UNWTO)	Y / A	FRONTUR, IBESTAT	

ANX.1.1.5 Energy Management, Climate Neutrality

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Climate change mitigation measures	Percentage of tourism enterprises involved in climate change mitigation/energy conservation schemes/programs – such as CO2 offset, low energy systems etc. (ETIS, UNWTO)	A	F. Impulsa, Regional Ministry Environment	
	Program and incentives assisting tourism enterprises to monitor, reduce and publicly report energy consumption and greenhouse gas emissions (GSTC)	A	FMT, General Directorate Energy	
	Program and incentives assisting tourism enterprises to monitor, improve and publicly report energy conservation and energy efficiency (GSTC)	A	FMT, General Directorate Energy	
	Program and incentives assisting tourism enterprises to reduce reliance on fossil fuels and use renewable energy technologies (GSTC)	A	General Directorate Energy	
Energy consumption	Energy consumption per tourist night compared to general population energy consumption per resident night (ETIS, UNWTO)	Y / A	Survey of water and energy consumption in tourist establishments. AETIB	13.03 Kwh (Tourist) vs 13.6 Kwh 2017 Balears

	Percentage of tourism enterprises taking actions to reduce/save energy consumption (ETIS, UNWTO)	Y / A	IBESTAT AETIB	
	Percentage of the annual amount of energy consumed from renewable resources (Mwh) compared to overall energy consumption at destination level per year (ETIS)	Y / A	REE, IBESTAT	
Energy production	Use of renewable energy sources at tourism enterprises	Y / A	AETIB, General Directorate Energy	12,6 % 2017 Balears

ANX.1.1.6 Water Management

Mallorca has very specific geomorphological features concerning the availability of drinking water, its management and treatment. This section includes the indicators that show the current situation and the water management challenges on the island:

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Overall water use relative to supply	Water use (total consumed and liter per tourist per day)	Y / A	AETIB	350 liter/stay (2017) total Balearic Islands
Water use/ water consumption	Water consumption per tourist night compared to general population water consumption per resident night (ETIS)	Y / A	AETIB	350 l. / 134 l. (INE, 2016)
	Total volume consumed and litres per tourist per day (UNWTO)	Y / A	AETIB	
	Percentage of tourism enterprises taking action to reduce water consumption (ETIS)	Y / A	AETIB	
	Percentage of tourism enterprises using recycled water (ETIS)	Y / A	AETIB	4,4% (2017) Balearic Islands
	Percentage of water saved (reduced, recaptured or recycled) (UNWTO)	Y / A	AETIB	

	Total water used by each sector (tourism as a percentage of all user sectors) (UNWTO)	A	F. Impulsa, EMAYA	
	Program assisting tourism enterprises to measure, monitor, reduce and publicly report water usage (GSTC)	A	General Directorate Water Management	
Water Security	Management system ensuring that water use by tourism enterprises and requirements of the communities in the destination are balanced and compatible (GSTC)	A	General Directorate Water Management	
Water Quality	Management system to monitor and publicly report on drinking and recreational water quality (monitoring results are publicly available and the system responds in a timely manner to water quality issues) (GSTC)	A	General Directorate Water Management	
Seasonal shortage, water shortages	Number of shortage incidents per year Number of days of supply shortage per year % of loss	A	F. Impulsa, General Directorate Water Management	
Cost and pricing of water	Water price per litre or cubic meter	A	General Directorate Water Management, EMAYA	

ANX. 1.1.7 Wastewater (Sewage) Management

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Sewage treatment systems	Percentage of sewage from the destination treated to at least secondary level prior to discharge (ETIS)	Y / A	General Directorate Water Management (Water portal), EMAYA, Calvià 2000	
	Percentage of sewage from key sites which receives treatment to meet standards (UNWTO)	Y / A	Water Portal. Regional Ministry of Environment, EMAYA, Calvià 2000	
	Percentage of tourism establishments on suitable treatment systems (UNWTO)	A	FEHM, EMAYA, Calvià 2000	
	Number of reported pollution or contamination events per annum in	A	Regional Ministry of Environment,	

	watercourses receiving effluents (UNWTO)		General Directorate Emergencies	
Wastewater	Regulations for the siting, maintenance, and testing of discharge from septic tanks and wastewater treatment systems, and evidence of their enforcement (GSTC)	A	General Directorate Water management	
	Regulations to ensure that size and type of wastewater treatment is adequate for the location, and evidence of their enforcement (GSTC)	A	General Directorate Water management	
	Program to assist tourism enterprises to properly treat and safely reuse wastewater with minimal adverse effects to the local population and environment (GSTC)	A	Regional Ministry of Environment and Urban and Territory	

ANX.1.1.8 Solid Waste Management

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Solid waste management	Waste production per tourist night compared to general population waste production per person (kg) (ETIS)	A	TIRME, EMAYA, CIM	
	Percentage of tourism enterprises separating different types of waste (ETIS) (UNWTO)	A	TIRME, ACH, CIM	
	Percentage of total waste recycled per tourist compared to total waste recycled per resident per year (ETIS)	A	TIRME, CIM	
Solid waste reduction	Waste volume produced by the destination (tons), percentage of waste attributable to tourism (UNWTO)	Y / A	TIRME, CIM	
	Volume of waste recycled (m3)/total volume of waste (specified by different types) (UNWTO)	A	TIRME, REZERO, CIM	
	Number of tourism establishments recycling their own waste (UNWTO)	A	TIRME, FEHM, REZERO, RECONATURA	
	Volume of hazardous substances in use (volume of use over time), attributable to tourism (UNWTO)	A	REZERO, CIM, ADALMO	
	Waste collection system that maintains public records on the amount of waste generated (GSTC)	A	TIRME, CIM	
	Solid waste management plan that is implemented and has quantitative goals to minimize and ensure safe disposal of waste (GSTC)	A	CIM	
	Program assisting tourism enterprises to reduce, reuse and recycle waste (GSTC)	A	RECONATURA, TIRME, REZERO, CIM	

	Program reducing the use of bottled water by tourism enterprises and visitors (GSTC)	A	Waste management department- CIM	
Maintaining a clean image for the destination	Quantity of waste strewn in public (garbage counts) (UNWTO)	A	EMAYA, Calvia2000	
	Visitor and local perception of the level of litter attributable to tourism (questionnaire-based) (UNWTO)	A	EMAYA, Calvia2000	
	Image of the cleanliness of destination (questionnaire-based) (UNWTO)	A	EMAYA, Calvia2000	

ANX.1.1.9 Tourism Governance, Destination Management

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Strategic planning and implementation	Existence of up-to-date multi-year tourism destination strategy with a focus on sustainability, including environmental, social, cultural and economic actions (UNWTO) (GSTC) (Guidebook STGD)	A	CIM	
	Degree of stakeholder participation in the process of developing and implementing the plan (e.g. numbers involved in advisory panels, working groups etc.) (UNWTO)	A	CIM	
	Percentage of actions of the sustainable tourism plan/strategy implemented (UNWTO)	A	CIM	
	Number of individuals within the destination management organization (DMO) with assigned responsibilities for sustainable tourism (GSTC)	A	FMT	
	Existence of a sustainable development officer or team, which is anchored in the organizational chart of the DMO (Guidebook STGD)	A	FMT	
	Existence of a system implemented by the destination that encourages public participation in destination planning and decision making on an ongoing basis (GSTC)	A	FMT	
	Existence of public meeting(s) held by the destination do discuss destination management issues each year (GSTC)	A	FMT	
Environmental and social impact monitoring	Existence of a system for identifying environmental risks related to tourist activities. Existence of measures to reduce environmental risks. (Guidebook STDG)	A	General Directorate Emergencies, FEHM	
	Percentage of tourism-related businesses in the destination that have	A	General Directorate	

	completed an Environmental Impact Assessment (UNWTO)		Emergencies, AETIB	
Sustainability certification schemes and quality awards	Number (percentage) of tourism enterprises and establishments in the destination (e.g., hotels, tour operators, sub-destinations) using a voluntary sustainability, environmental or corporate social responsibility certification/label (ETIS) (UNWTO) (Guidebook STDG)	A	CAEB, CIM	
	Number of tourism businesses in the destination that have environmental or sustainable development certification. Number of tourism businesses with a quality distinction/award (Guidebook STGD)	A	Regional Ministry Tourism	
	Number (percentage) of tourism businesses with an accessibility label, indicating that sites and attractions can be accessed by people with disabilities or by others with specific access requirements (Guidebook STGD)	A	Regional Ministry Tourism	
	Existence of a system for evaluating tourism businesses and services with regard to their sustainable development performance (Guidebook STGD)	A	AENOR, Regional Ministry Environment, EMAS	
	Number/percentage of tourist services verified as sustainable by the DMO according to the evaluation system (Guidebook STGD)	A	FMT	
	Publicly available list of sustainably certified or verified enterprises (GSTC)	A	EMAS, AENOR	
Branding, image and ranking of the destination	Percentage of tourists having visited the destination who have a positive image of the destination and who would recommend the destination to their peers (UNWTO)	Y / A	EGATUR IBESTAT	
	Percentage of visitors satisfied with their experience and who agree that the reality matched what was advertised (survey-based) (UNWTO)	Y / A	EGATUR IBESTAT	
	Rank of the destination on list with other destinations (image by those who have not visited the destination) (UNWTO)	Y / A	F. Impulsa ICT	8 of 280 regions 2019
	Percentage of residents perceiving the destination's brand and promotional messages to positively and respectfully reflect their authentic and preferred attributes and values (survey-based) (UNWTO)	Y / A	AETIB	
	Percentage of the audience which perceives that the destinations promotional messages authentically	A	FMT	

	and respectfully reflect the preferred attributes and values (UNWTO)			
	Percentage of destination promotional messages that represent local communities and visitors authentically and respectfully. Existence of destination promotional messages that are accurate in their description of products and services (GSTC)	A	FMT	
	Percentage of visitors who believe the brand values, attributes and benefits communicated were met during their trip and who expect to return to the destination (survey-based) (UNWTO)	A	FMT, AETIB	
	The DMO promotes typical local and regional products and services (Guidebook STGD)	A	FMT	
	Number of communication materials promoting regional products and service providers (Guidebook STGD)	A	FMT	
Information and awareness building on sustainable tourism	Existence of program(s) provided by the destination in communities, schools and higher education institutions to enhance awareness and understanding of sustainable tourism (GSTC)	A	CIM	
	The destination has an up-to-date, publicly available inventory and classification of its tourism assets and attractions, including natural and cultural sites (GSTC)	A	AETIB, CIM	
	Number of places (communication tools) in the destination that provide information to the residents and visitors on sustainable tourism objectives, actions, projects and initiatives of the destination (UNWTO) (Guidebook STGD)	A	FMT	
	Percentage of residents that have a clear understanding of what sustainable tourism means and of the role of sustainable tourism planning, management and monitoring (survey-based) (UNWTO)	A	CIM, AETIB	
	Percentage of visitors that are aware of the objectives, activities, projects and initiatives of the destination with regard to sustainable tourism (Guidebook STGD)	A	CIM, AETIB	
Public support of tourism development	Amount and percentage of public authority budget designated for supporting tourism-related development (UNWTO)	A	CIM, FMT, AETIB-tourist tax	
	Total number of civil servants working on tourism activities in the destination	A	CIM, GOIB, Municipalities	
	Global touristic related activities budget of all public sector	A	CIM, GOIB, Municipalities	

ANX.1.1.10 Climate change adaptation and Extreme Weather Events

ANX.1.1.10.1 Adaptation

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Level of damage related to extreme climatic events	<ul style="list-style-type: none"> ▪ Frequency of extreme climatic events ▪ Value of damage to the tourism industry 	A	General Directorate Emergencies, AEMET	
Climate change adaptation and mitigation strategy	Existence of an analysis on climate action and climate adaptation and mitigation strategy for the destination (Guidebook STGD)	A	CIM, FMT, General Directorate Emergencies	
	Percentage of tourism enterprises in contact with the Destination Marketing Organization (DMO) that are involved in climate action and climate adaptation measures (Guidebook STGD)	A	General Directorate Emergencies, AETIB, F. Impulsa (indicators lct7.1, 7.2, 7.3 e lct7.5)	
	Percentage of tourism enterprises involved in climate change mitigation schemes and adaptation responses and actions (ETIS)	A	FMT, CAEB, FEHM, ACH	
	Existence and performance of climate change/natural hazards risk assessment for new infrastructures and tourism activities	A	General Directorate Emergencies	
	Public funds for climate resilience developments	A	GOIB	
	Destination Marketing promoting the identity and authenticity independently of the climate conditions (local culture, local products, handicrafts, gastronomy, protected areas, agriculture, regional economic cycles)	A	FMT	
	Number of tourist companies engaged in climate change mitigation actions	A	AETIB, FEHM, ACH	
Climate change and exposure to risk	Percentage of tourism accommodation and attraction infrastructure located in "vulnerable zones" (ETIS, UNWTO)	A	General Directorate Emergencies	
Degree of planning for climate change impacts	Degree to which key tourist zones are covered by contingency or emergency planning (% or area included) (UNWTO)	A	General Directorate Emergencies	
Level of damage related to extreme climatic events	Frequency of extreme climatic events (UNWTO)	A	General Directorate Emergencies, AEMET	



Emisiones de gases de efecto invernadero por destilación y por componente turístico	C02 total produced due to the Energy consumption of the community	Y / A	General Directorate Energy and climate change	
	Fossil fuels consumption by tourism	Y / A	AETIB	44,6% gasoil, el 30,5% gas natural, el 32,0% GLP 2017 Balears
Uso de combustible para el transporte	Total consumption of fossil fuels for transport per capita	A	General Directorate Energy and climate change, CTM	
	Total consumption of fossil fuels in destinations for tourist transport	A	General Directorate Energy and climate change, CTM	
Impacts on foreshore	Value of damages annually due to storm events or flooding	A	General Directorate Emergencies	
Impacts on mountains and woods	Value of damages annually due to wildfires, storms or drought	A	General Directorate Emergencies	
Impact on wildlife and biodiversity	% of tourism dependent on viewing species % of key species considered vulnerable to climate changes	Y / A	F. Impulsa ICT7.7	

Anx.1.1.10.2 Mitigation

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Greenhouse gas emissions by the destination and by the tourism components	<ul style="list-style-type: none"> Total CO2 produced due to the community's energy consumption Consumption of fossil fuels by the tourism sector 	Y / A	F. Impulsa, General Directorate Energy and climate change	
Transportation fuel use	<ul style="list-style-type: none"> Total consumption per capita of fossil fuels for transportation Total consumption of fossil fuels in the destination for tourist's transportation 	Y / A	F. Impulsa, General Directorate Energy and climate change	
Coverage of natural areas	% of natural area coverage in the territory of the destination (and changes over time)	Y / A	F. Impulsa	

ANX.1.1.11 Sustainable Tourism Practices

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
17 Sustainable Development Goals (SDGs)	351 indicators	Y / A	INE	https://www.ine.es/dynt3/ODS/es/info.htm?id=4918

ANX.1.1.12 Universal Inclusivity

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Access for all, low barrier tourism	Existence of accessibility policies	A	Regional Ministry Social Affairs / IMAS	
	Existence of accessibility programmes	A	Regional Ministry Social Affairs / IMAS	
	Existence of public transport adapted to Mobility problems/restrictions	A	CTM, EMT, IMAS, Regional Ministry Social Affairs	
	Number of tourism companies in the destination offering tourist guides prepared for people with disabilities	A	AETIB, FEHM, ACH	
Accessibility in public buildings, hotels and tourism services	Restaurants, hotels and public Buildings with accessible WC and Wheelchairs	A	AETIB-Regional Ministry Tourism, IMAS	

	Number and percentage of hotels with accessible rooms for people with disabilities	A	AETIB-Regional Ministry Tourism, IMAS	
Accessibility of Tourist attractions and cultural and natural sites.	Percentage of Tourist attractions accessible with wheelchair	A	AETIB, Regional Ministry Social Affairs, IMAS	
	Percentage of tourist attractions that offer and alternative Access for people with mobility impairments	A	AETIB, Regional Ministry Social Affairs, IMAS	
Assistance when needed	Distance to hospitals and care centres in the region	A	F. Impulsa, IBSALUT	
Satisfaction of people with mobility impairments, with the destination and its attractions	Survey to the departing tourists	A	AETIB	
Satisfaction, wellbeing and behaviour of visitors	Tourism accessibility to Mobility (including silver tourists and people with disabilities) with special attention to accessible public transport (barrier free)	A	Regional Ministry Social Affairs, IMAS	
	Alignment of the infrastructure linked to public and private tourism with the barrier free concepts	A	Regional Ministry Social Affairs, IMAS, AETIB	
	Barrier free planning for buildings linked to tourism with approval procedures	A	Regional Ministry Social Affairs, IMAS, AETIB	
	Barrier free tourism attractions	A	Regional Ministry Social Affairs, IMAS, AETIB	
	Tourist access to health services	A	IBSALUT, Insurance companies	
	Tourism security	A	IBSALUT, Cercle d'Economia	
	Variety of tourism experiences (diversification of products, services range, travel circuits, routes)	A	AETIB	
	Adaptation of the products' portfolio to the increasing number of consumers (friendly services, adapted to each age)	A	AETIB	
	Satisfaction by those with mobility challenges with the destination and attractions	A	AETIB	
Access for all, low barrier tourism	Existence of policies (guidelines, regulations, etc.) supporting access to tourist sites and facilities for individuals with specific access requirements (including public transport, accommodation establishments, natural and cultural sites) (GSTC)	A	Regional Ministry Social Affairs	

	Number of rooms in commercial accommodation accessible for people with disabilities (ETIS) (UNWTO)	A	AETIB-Regional Ministry Tourism	
	Percentage of accommodation establishments participating in recognized accessibility information schemes (ETIS)	A	AETIB	
	Percentage of public transport that is accessible to people with disabilities and specific access requirements (ETIS) (UNWTO)	A	Regional Ministry Social Affairs, CTM, EMT	
	Percentage of tourist attractions that are accessible to people with disabilities and/or participating in recognized accessibility information schemes (ETIS) (UNWTO)	A	Regional Ministry Social Affairs, AETIB, Regional Ministry Tourism	
Access to public buildings, hotels and tourist services	<ul style="list-style-type: none"> ▪ Number and % of hotels with rooms accessible to people with disabilities ▪ Restaurants, hotels and public buildings with wheelchair-accessible restrooms 	A	Regional Ministry Social Affairs, AETIB, Regional Ministry Tourism	
Access to tourist attractions, including natural and cultural sites	<ul style="list-style-type: none"> ▪ Percentage of attractions with wheelchair access ▪ Percentage of attractions offering alternative access for those with mobility concerns 	A	Regional Ministry Social Affairs, AETIB, Regional Ministry Tourism	
Assistance when needed	Distance to hospitals in the region or medical facility	A	F. Impulsa	

ANX.1.2 DESTINATION SPECIFIC ISSUES, MONITORING ISSUES & INDICATORS

ANX.1.2.1 Innovation

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Innovation capacity	Spending in R+D	Y / A	F. Impulsa lcg11.1	
	Requests for patents	Y / A	F. Impulsa lcg11.2	
	ICT patents	Y / A	F. Impulsa lcg11.3	
	High-Tech patents	Y / A	F. Impulsa lcg11.5	
	Human resources associated with science and technology	Y / A	F. Impulsa lcg11.6	
	People employed in knowledge-intensive technological sectors	Y / A	F. Impulsa lcg11.8	
	People employed in travel and tourist technology sectors	Y / A	Turistec BBDD	1,242 (SMEs) 2020
	Concentration of workers in High-Tech clusters	Y / A	F. Impulsa lcg11.9	
	People employed in highly creative industries	Y / A	F. Impulsa lcg11.11	
Technology preparedness	Availability of the latest technology	Y / A	F. Impulsa lcg9.2	
	Technology adoption	Y / A	F. Impulsa lcg9.5	
	Technological absorption in companies	Y / A	F. Impulsa lcg9.9	
	Technology transfer and direct foreign investment	Y / A	F. Impulsa lcg9.10	

ANX.1.2.2 Sustainable production and consumption

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Supporting local entrepreneurs	Existence of program provided by the destination that encourages tourism-related enterprises to purchase goods and services locally (GSTC)	A	CIM	

	Existence of program provided by the destination that encourages local enterprises to produce sustainable local products (based on nature and culture, etc.) (GSTC)	A	CIM, ICOMOS	
	Number (percentage) of products/service components that are promoted as sustainable, on the basis of sustainable performance evaluation of tourism service providers (Guidebook STGD)	A	CIM, Regional Ministry of Agriculture	
Tourism supply chain	Percentage of locally produced food, drinks, goods and services sourced by the destinations tourism enterprises (ETIS)	A	MERCAPALMA, ACH, FEHM, Regional Ministry of Agriculture, CIM, Agri-food cooperatives	
Sustainable tourism and sustainability aspects	Percentage of tourism enterprises and establishments in the destination using a voluntary sustainability or CSR certification or label (ETIS)	A	Regional Ministry of Tourism	
	Number (percentage) of tourism businesses certified by a sustainability scheme (UNWTO)	A	Regional Ministry of Tourism	
	Percentage of establishments and operators marketing sustainable, sensitive or green products or experiences (UNWTO)	A	FMT, AETIB	
	Percentage of tours/guides offered in the destination with trained knowledge of sustainable tourism practice (UNWTO)	A	AETIB	
	Percentage of businesses that include information on sustainable tourism/environmental and social aspects in their marketing and communication material (UNWTO)	A	FEHM, ACH	
Identifying the market for more sustainable products	Percentage of visitors seeking environmentally and culturally sensitive experiences and who are interested in sustainable products (survey-based) (UNWTO)	A	FMT, AETIB	
	Percentage of visitors willing to pay extra for these experiences of enhanced value/ for sustainable products (survey-based) (UNWTO)	A	AETIB, F. Impulsa	
	Numbers of external operators and visitors requesting/seeking sustainable/certified products (UNWTO)	A	FMT, AETIB	

ANX.1.2.3 Biodiversity and nature protection

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
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Landscape and biodiversity protection	Percentage of local enterprises in the tourism sector actively supporting the protection, conservation and management of biodiversity and landscapes in the destination (ETIS)	A	CAEB, FEHM, CEPYME	
	Percentage of tourism-related businesses in the destination contributing to nature conservation (UNWTO)	A	CAEB, FEHM, CEPYME	
Sustainability of key species	Counts for key species in the destination (flora/fauna) (UNWTO)	Y / A	F.Impulsa lcg11.2, 11.3, 11.4 y 11.5	
Biodiversity conservation and maintenance of protected areas	Area protected (km2) classified by the different IUCN levels of protection (UNWTO)	Y / A	F.Impulsa lcg11.2, 11.3, 11.4 y 11.6	
	Percentage of the Protected Area System/Conservation budget originated from tourism (UNWTO)	Y / A	F.Impulsa lcg11.2, 11.3, 11.4 y 11.7	
	Percentage of tourism products (tours etc.) with specific contributions for biodiversity and nature conservation built into the price or surcharges (UNWTO)	A	AETIB	
	Percentage of tourists aware of the importance of biodiversity protection and conservation sites in the destination (UNWTO)	A	AETIB	
	Existence of codes of conduct for ecosystem sites (protected areas) open to visitors (UNWTO)	A	Regional Ministry of Environment	
	Percentage of natural area coverage (inside and outside protected areas) in the destination (change over time) (UNWTO)	Y / A	F.Impulsa lcg11.2, 11.3, 11.4 y 11.7	
	Relationship between tourism and protected environments	Number of cooperation meetings between tourism decision-makers and nature conservation and environmental protection representatives (Guidebook STGD)	A	FMT, CIM
Tourism decision-makers are integrated into a panel association related to special protection areas (Guidebook STGD)		A	CIM	
Number of joint projects between DMO and environmental protection and nature conservation stakeholders (Guidebook STGD)		A	FMT	
Number of product components and communication materials from the DMO that promote experiences and raise awareness of biological diversity (Guidebook STGD)		A	FMT	

	Number of protected area (nature protection) staff in the communities related to the number of visitors and tourism development initiatives	A	Regional Ministry of Environ, AETIB	
Protection of sensitive environments	Maintained and updated inventory of sensitive and threatened species and habitats (GSTC)	A	Regional Ministry of Environ	
	Management system monitoring impacts and protecting ecosystems, sensitive environments and species (GSTC)	A	Regional Ministry of Environ	
	Sustainability assessment within the last five years, identifying environmental risks. System in place to address identified risks (GSTC)	A	Regional Ministry of Environ	
	Cooperation between local authorities and nature conservation authorities in connection with projects related to landscapes and townscapes (Guidebook STGD)	A	AETIB, Regional Ministry of Environ	

ANX.1.2.4 Cultural heritage and traditions

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Legislative basis for protection	Number and type of legislation or amendments introduced to preserve built heritage (UNWTO)	Y / A	F. Impulsa iCG11.1, ICOMOS	
	Number and type of designation under which historic structures, monuments and districts are recognized, percentage of eligible sites and structures receiving designation (UNWTO)	A	CIM	
Conserving built heritage	Tourism contribution to the preservation of built heritage (UNWTO)	A	AETIB (ecotax)	
	Increase/decrease in threats to the original purpose and use of built heritage sites (UNWTO)	A	ICOMOS	
	Number of regular dialogue between the DMO and the institutions that plan the preservation of cultural heritage (Guidebook STGD)	A	FMT	
Heritage promotion	Existence of a list of the destination's examples of cultural heritage and its most noteworthy attractions (Guidebook STGD)	A	FMT	
	Number/percentage of communication material presenting the destination's intangible cultural heritage and of activities publicized by the DMO that focus on cultural heritage and regional traditions (Guidebook STGD)	A	FMT	

Enhancing cultural heritage	Percentage of the destination's events that are focused on traditional/ local culture and heritage (ETIS)	A	FMT	
Attraction protection	Management system to protect natural and cultural sites, including build heritage and rural and urban scenic views (GSTC)	A	CIM, AETIB	
	Management system to monitor, measure and mitigate tourism impacts on sites and attractions (GSTC)	A	CIM	
Visitor management	Administrative mechanism responsible for implementing visitor management plans and operations that include measures to protect and enhance natural and cultural assets (GSTC)	A	CIM, AETIB	
Visitor behaviour	Cultural and environmental guidelines for visitor behaviour in sensitive cultural and natural sites. Interpretive information available to visitors in tourist offices and at natural and cultural sites (GSTC)	A	CIM	
	Code of practice for tour guides and tour operators how to behave in sensitive cultural and natural sites (GSTC)	A	FMT	
Cultural heritage protection	Program to protect and celebrate intangible cultural heritage (e.g. songs, music, drama, skills and crafts) (GSTC)	A	CIM	

ANX.1.2.5 Mobility

Mallorca is a tourism destination with very special needs in terms of accessibility, it is an island in the Mediterranean and can only be accessed by air and sea, and in terms of inland and coastal movements. In this selection of indicators, we include aspects relevant to multimodal transport, infrastructure availability for transport, accessibility to public and private resources, etc.

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Knowledge of tourism-related mobility patterns	<ul style="list-style-type: none"> ▪ Tourist number visiting site ▪ Seasonality and length of stay ▪ Total km travelled per tourist per trip ▪ Modes of transport used by tourists to reach the destination ▪ Modes of transport used by tourists within the destination 	A	AETIB	

Access to the holiday destination	<ul style="list-style-type: none"> ▪ Density of road network ▪ Annual levels of investment in public transport compared with road infrastructure ▪ Frequency, capacity of services and use levels (land, sea, air transport) ▪ Number of direct flights, number of cities served by direct flights (% of passengers arriving without stops) 	A	AETIB, AENA, F. Impulsa	
Reducing transport impact	Percentage of different modes of transport used by tourists and same-day visitors to arrive at the destination (ETIS) (UNWTO)	A	CTM, discretionary transport	
	Percentage of tourists and same-day visitors using soft mobility or public transport services to get around the destination (ETIS)	A	CTM, EMT, other actors	
	Average km by tourists and same-day visitors from home to the destination (ETIS) (UNWTO)	A	CTM, AETIB	
	Average carbon footprint of tourists and same-day visitors travelling from home to the destination (ETIS)	A	CTM, AETIB	
Standards of fossil fuels consumption, air quality and noise in the destination	Consumption of fossil fuels for tourist transportation within the destination (categorized by transport type) (UNWTO)	A	CTM, AETIB	
	Number of days exceeding standards of air quality in the destination (UNWTO)	A	APB, Regional Ministry of Environment	
	Noise levels at critical sites in decibel in the destination (UNWTO)	A	Regional Ministry of Environment, municipalities	
	Visitor perception of air quality and traffic noise in the destination (UNWTO)	A	AETIB	
Transport services and mobility in the destination	State of accessibility of the destination by public transport: frequency, capacity of services and use levels towards/from the destination (UNWTO)	A	CTM, SFM	
	Level of facilitation (services) of information regarding transport and mobility in the destination (UNWTO)	A	CTM, EMT	
	Existence and implementation of an integrated sustainable mobility concept (UNWTO) (Guidebook STGD)	A	Regional Ministry Mobility	
	Visitors' perception and demand of transport services to/from/within the destination (UNWTO)	A	Regional Ministry Mobility	
	Number of passengers transported within the destination by local public transport for tourism/leisure purposes compared to the number of visitors using individual transport (UNWTO)	A	CTM, discretionary transport, rent-a-car, Regional Ministry Mobility	
	Percentage of accommodations, tourism facilities and other tourist attractions	A	AETIB, FEHM	

	accessible by public transport (less than 10 minutes walking distance to nearest stop) (UNWTO)			
	Visitor satisfaction with integrated public transport services (UNWTO)	A	CTM, EMT	
	Extent and capacity of public transport within the destination (UNWTO)	A	CTM, Regional Ministry Mobility	
	Percentage of visitors using alternative/ soft mobility (bicycles, walking, other low energy use options) to get around the destination (UNWTO)	A	AETIB. Regional Ministry Mobility	
	Percentage of DMO informational materials that prominently promote public transport options. Percentage of services advertised for tourists by the DMO that integrate environmentally friendly leisure-time mobility (Guidebook STGD)	A	FMT	
	Percentage of each category of transport in the destination that is accessible, i.e. public transport and private hire coaches, minibuses, taxis or minicabs (ETIS)	A	Regional Ministry Mobility	
Parking spaces	Parking capacities and use levels (UNWTO)	A	Regional Ministry Mobility	
	Number and type of measures restricting car access or parking spaces (UNWTO)	A	Regional Ministry Mobility	
Knowledge of the Mobility patterns linked to tourism	Number of tourists visiting the destination (even for only one day)	A	Regional Ministry Mobility and Housing, CTM Palma 365, CIM	
	Tourism seasonality and stay duration	A	AETIB, FEHM	
	Annual number of one-day tourists	A	AETIB	
	Total number of kms travelled by each Tourist per trip	A	AETIB	
	Type of transport used to reach the destination	A	AETIB	
Accessibility to tourism destinations (availability/improvement of roads network, ports, train and airport infrastructures)	Roads density (motorways, dual carriageway and roads)	A	Regional Ministry Mobility and Housing, CTM Palma 365, CIM	
	Level of annual investment in public transport compared with the infrastructure roads.	A	CIM-Roads department	
	Frequency, services capacity and levels of usage (land, sea, air)	A	Regional Ministry Mobility	

Accessibility to the destinations by public transport	Number of direct flights, number of cities with direct flight (and % of passengers without transit)	Y / A	Regional Ministry Mobility and Housing, CTM Palma 365, CIM	
Travel duration and trust	Average related to the use of public transport versus private transport to reach the destination	A	Regional Ministry Mobility and Housing, CTM Palma 365, CIM	
	Level of air and soil emissions for Passenger's transport during the low and high season (per passenger/km)	A	CTM	
Competitiveness of the destination, and availability of infrastructures	Quality of airport infrastructures	Y / A	F. Impulsa iCG8.1, AENA	
	Quality of roads	Y / A	F. Impulsa iCG9.1	
	Quality of rail infrastructures	Y / A	F. Impulsa iCG9.2	
	Quality of ports infrastructures	Y / A	F. Impulsa iCG9.3, APB	
	Density of rail lines	Y / A	F. Impulsa iCG9.5, SFM-CTM	
	Density of the road network	Y / A	F. Impulsa iCG9.6, CIM-Roads department	
	Degree of efficiency of road transport	Y / A	F. Impulsa iCG9.4	
	Maritime passengers' traffic	Y / A	F. Impulsa iCG9.7, APB	
	Air traffic in domestic flights	Y / A	F. Impulsa iCG8.2, AENA	
	Air traffic in regular international flights	Y / A	F. Impulsa iCG8.3, AENA	
	Airplanes transit	Y / A	F. Impulsa iCG8.4, AENA	
	Airports density	Y / A	F. Impulsa iCG8.5, AENA	
	Flight connections in operation	Y / A	F. Impulsa iCG8.6, AENA	
	Electric vehicle charging points	Y / A	MELIB (GOIB)	

ANX.1.2.6 Land use, spatial planning and tourism development control

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Whether any land use or development planning process exists explicitly incorporating tourism	<ul style="list-style-type: none"> Existence of a land use or development planning process, including tourism % of area subject to control (density, design...) % of area designated for tourism purpose, for buildings... 	A	CIM	
Extent and effectiveness of monitoring control processes	<ul style="list-style-type: none"> Existence of specific criteria for tourism development control in plans, such as maximum numbers of hotel/beds, density standards,... % of building proposals receiving environmental review or undergo environmental impact assessment 	A	CIM, GOIB	
Whether or not there is systematic enforcement of the plan and its criteria	<ul style="list-style-type: none"> Existence of review procedures (e.g. Site visits, evaluations) Number of charges for plan, zoning or site plan violation 	A	CIM	
Planning regulations	The destination has planning or zoning guidelines and/ or regulations that protect natural and cultural resources and require environmental, economic, and social impact assessment (GSTC)	A	Regional Ministry of Environment	
Erosion	Percentage of surface in eroded state due to tourist activities and tourism-related clear-cutting and road construction (UNWTO)	A	Regional Ministry of Environment	
	Percentage of surface without tree or shrub cover due to tourism-related development (UNWTO)	A	Regional Ministry of Environment	
Visual pollution	Percentage of visible slopes without tree or shrub cover (UNWTO)	A	Regional Ministry of Environment	
	Tourist opinion of the state of visits, visual pollution, perception of visual destination quality (UNWTO)	A	AETIB	
	Change in visual pollution through night lighting (change over time)	A	AETIB	
Integration with the landscape	Percentage of sites cleared for development (UNWTO)	A	IBESTAT	
Physical form	Density of buildings per hectare (footprint and floor space per unit area) (UNWTO)	A	IBESTAT	
Siting and orientation	Percentage of infrastructure built on slopes (change over time) (UNWTO)	A	IBESTAT	

Development planning plan explicitly incorporating tourism	Percentage of area designated for tourism and other land use purposes in the plan (UNWTO)	A	IBESTAT	
	Percentage of the destination with an accessible tourism strategy/action plan, with agreed monitoring, developed control and evaluation arrangements (ETIS)	A	IBESTAT	
Extent and effectiveness of monitoring and control processes	Existence of zones and criteria for tourism development control in land use plan (e.g. maximum numbers of hotels or beds, density standards, design control, environmental and social criteria) (UNWTO)	A	Regional Ministry of Tourism	
	Percentage of tourism-related building proposals undergoing environmental impact assessment (EIA) (UNWTO)	A	Regional Ministry of Tourism / Regional Ministry of Environment	
	Percentage of tourism-related building proposals denied or sent for revision (UNWTO)	A	Regional Ministry of Tourism / Regional Ministry of Environment	
	Percentage of sites with regulated zoning/controls, extent of tourism use zones (UNWTO)	A	Regional Ministry of Tourism / Regional Ministry of Environment	

ANX.1.2.7 Visitor management, control of use intensity and territorial distribution. Capacity planning

These indicators are provided by official island statistics and include essential information about the destination's capacity and *overtourism* management.

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Carrying capacity	Total tourist numbers (mean, monthly, peak) categorized by their type of activity (UNWTO)	A	IBESTAT	
	Number of tourists per km ² of the destination – mean number/peak month average/peak day (UNWTO)	A	IBESTAT	
	Density counts for vehicle (e.g. cars per minute on roads to tourist attractions) (UNWTO)	A	IBESTAT	
	Ratio of number of vehicles per parking space (UNWTO)	A	IBESTAT	

	Percentage of tourists and residents who believe that the destination is too crowded (questionnaire-based) (UNWTO)	A	AETIB	
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ANX.1.2.8 Visitor satisfaction and behaviour

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organization	Value
Customer satisfaction	Percentage of tourists and same-day visitors that are satisfied with their overall experience in the destination (ETIS)	A	AETIB	
	Level of satisfaction by visitors on exit (questionnaire-based survey) (UNWTO)	A	AETIB, CALVIA Municipality	
	Percentage of repeat, return visitors (within 5 years) (ETIS) (UNWTO)	A	AETIB	
	Number of complaints received (UNWTO)	A	AETIB	
	Internet Ratings (UNWTO)	A	AETIB	
Visitor health, safety and security	Number of illness and death cases of tourists and the cause (UNWTO)	A	IBSALUT- Population census	
	Number of visits by tourists to local doctors (UNWTO)	A	IBSALUT-Gr. Primary Care	
	Number, type and cause of accidents/incidents involving tourists (UNWTO)	A	General Directorate of Traffic. IBSALUT	
	Number of tourists harmed (UNWTO)	A	IBSALUT, insurance companies	
	Number and percentage of tourism establishments and attractions complying with safety and security standards (UNWTO)	A	Regional Ministry of Tourism, DG General Directorate Industry	
	Number of compulsory inspections of fire, food hygiene, and electricity safety for tourism properties (GSTC)	A	Regional Ministry of Tourism, DG General Directorate Industry	
	Number of first aid stations at tourist attraction sites (GSTC)	A	Regional Ministry of Tourism	
	Existence of updated and publicly available crisis and emergency response plan (destination wide) that considers the tourism sector (GSTC)	A	General Directorate Emergencies	
	Number of tourist harassment incidents reported (UNWTO)	A	General Directorate Emergencies	

	Percentage of tourists who register a complaint with the police (ETIS)	A	CNP, Guardia Civil (military police), Local police, General Directorate Internal Affairs	
	Perception of level of harassment or anxiety (part of the questionnaire-based survey) (UNWTO)	A	AETIB	
	Existence and implementation of a destination-wide risk management system with regard to potential risks to visitors' security and health (Guidebook STGD)	A	General Directorate Internal Affairs	
Quality of experience and services	Perception of variety of experience by tourists (questionnaire) (UNWTO)	A	AETIB	
	Range of tourist attractions and services available in the destination classified by type (accommodation, catering, transportation, information, guiding, events, etc.) (UNWTO)	A	Regional Ministry of Tourism	
Sports & tourism	Number of touring cyclists in peak, shoulder and low seasons	A	STRAVA	
	Number of touring cyclists per origin	A	STRAVA	
	Number of running tourists in peak, shoulder and low seasons	A	EliteChip	
	Number of trail running tourists in peak, shoulder and low seasons	A	EliteChip	
	Number of golf players in peak, shoulder and low seasons	A	AETIB	
	Number of sport sailing players in peak, shoulder and low seasons	A	AETIB	
	Number of massive running events (iron man, triathlon, etc.)	A	EliteChip, AETIB	
	Number of athletes performing specialized sports in the three seasons	A	AETIB, FMT	
	Number of rest of tourism sports players in peak, shoulder and low seasons	A	FMT	
	Economic impact of these activities on global tourism GDP	A	IBESTAT, AETIB	
	Number of public-private collaboration agreements to support these activities	A	FMT	

ANX.1.2.9 Health safety and security

Component of the issue	Indicators	Monitored (Y/N) Available (A)	Primary partner organisation	Value ⁴²
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⁴² Data December 31st, 2020



Health Safety and Security	COVID-19 monitoring. Number of active cases in the day	Y /A	IBSALUT	3209
	COVID-19 monitoring. Number of discharges in the day	Y /A	IBSALUT	15832
	COVID-19 monitoring. Accumulated deaths	Y /A	IBSALUT	360
	New cases per 100k last 7 days	Y /A	Cercle d'Economia de Mallorca	78.5
	Infection rate last 7 days	Y /A	Cercle d'Economia de Mallorca	0.8
	Positive Test Rate (COVID test positive last 7 days)	Y /A	Cercle d'Economia de Mallorca	4.1
	ICU headroom used	Y /A	Cercle d'Economia de Mallorca	29%
	Quality of healthcare	Y /A	Cercle d'Economia de Mallorca	Excellent

ANNEX 2 – SPECIFIC SUSTAINABILITY INITIATIVES BEING IMPLEMENTED BY AENA AT PALMA DE MALLORCA AIRPORT

Among the initiatives foreseen for the Palma de Mallorca Airport, in the frame of this strategy, the following stand out:

- **Carbon Footprint Certification:** Palma de Mallorca Airport participates in the ACI Europe “Airport Carbon Accreditation” programme for carbon footprint certification, especially for airports. It is a worldwide certification programme with institutional backing. It independently assesses and acknowledges the efforts airports put into managing and reducing their carbon emissions. The Palma de Mallorca Airport has been taking part in this programme since 2013. It currently holds level 2 accreditation that implies assessing and quantifying its carbon footprint and providing evidence of efficient carbon management, including the definition of objectives and demonstrating a reduction of CO₂ emissions compared to the average of the last three years. It intends to achieve a level 3+ accreditation, equivalent to carbon neutrality, in 2026. This management process has led to a gradual reduction of airport emission in recent years, and Scope 1 and 2 emissions are also significantly lower than the average of European airports.
- **Energy consumption reduction:**
 - Replacement of lighting systems with LED technology. Stage I of this initiative has resulted in savings of 3,332,423.81 kWh, and stage II is expected to be implemented in 2020 and 2021.
 - Thermal insulation initiatives in the Terminal building and Modules to reduce the amount of energy used to control the temperature inside the buildings.
 - Replacement of air conditioning systems for more efficient appliances.
- **Energy from renewable sources:**
 - Purchase of electricity with the guarantee it is produced from renewable sources: in 2018 the percentage of energy consumed with a renewable energy guarantee of origin was forty per cent. In 2020, 100 per cent of the energy consumed by Aena was renewable and can be certified with a Guarantee of Origin.
 - Self-consumption of renewable energy:
 - Installation of a photovoltaic power station at Son Bonet Airport that produces around 20 MWp, supplying an equivalent forty per cent of the total energy needed to run both of the island’s airport. Likewise, the feasibility of including photovoltaic panels on the roofs of the car park’s top floor will be analysed. Depending on the results, this will be included as another initiative to be carried out at the Palma de Mallorca Airport in the frame of Aena’s sustainability strategy.
 - Aena’s Photovoltaic Plan. In this plan’s frame, solar power plants will be set-up on our facilities, and they will distribute self-consumption energy to all of the airports connected up. Supplying 100 per cent self-consumption energy (with a production of

950GW of renewable energy equivalent to the consumption of 280,000 households/year and with an investment of over 350 million euros by 2026)

▪ **Promote the reduction of third party emissions:**

- Implementation of A-CDM (Airport Collaborative Decision Making) to improve efficiency in operations. A-CDM is a concept developed by Eurocontrol for decision making in air traffic control that allows the sharing of information from all stakeholders: airport operators, air navigation service providers, airline companies and handling agents. This concept enables the optimisation of resources and the management and predictability of air traffic. From the results obtained from its implementation, we can find a significant reduction in taxi times and aircraft queues, which results in a substantial reduction in fuel consumption.
- Introduce into Ground Handling bid specifications a clause that will make them reduce their emissions by twenty per cent in 2020. This percentage will be gradually increased in further bid specifications.
- Installation of twelve charging points for electric vehicles used by ground handling services.
- Increase in the number of airbridges to the detriment of buses, with the consequent contribution to lower emissions generated by aircraft and support vehicles (GSE)
- Gradual incorporation of eco-vehicles into the airport's fleet.
- Work on entrances and car parks that will contribute to reducing emissions and decongesting traffic in those areas.

▪ **Promote sustainable mobility**

- Installation or RECHARGING POINTS for electric vehicles in car parks with the aim of having one for every forty spaced in all airport car parks.
- Advocate for a Tram line to the airport.
- Advocate for a bike lane to the airport.

The airport is also firmly committed to always working with aircraft manufacturers, airlines, air traffic service providers, fuel producers, ground handling companies, etc. in the implementation of projects with a comprehensive approach and addressing the challenge of decarbonisation in the airline sector.

In this regard, work is being carried out to introduce new technologies and innovative systems, based on the corresponding viability studies that will give the green light to initiatives such as:

- Actions to allow the production and distribution of Sustainable Aircraft Fuel (SAF) at the airport.
- Initiatives to encourage the promotion and consumption of hydrogen using it for vehicles and as a vector to stock electric energy.
- Promotion of the use of geothermal energy to cool or heat airport terminal buildings.

ACCESSIBLE SERVICES AND FACILITIES

The Palma de Mallorca Airport has a free assistance service for people with reduced mobility in accordance with the EU Regulation 1107/2006. This primary objective of the regulation is to allow disabled persons and persons with reduced mobility to have the same possibility to travel by air as other citizens.

Since its inception, Aena has always worked with the “Spanish Committee of Representatives of Persons with Disabilities” (CERMI for its acronym in Spanish) to offer all passengers who need it, a top-quality service completely adapted to their needs. Aena has received various national and international awards and recognitions for this service.

The Palma de Mallorca Airport has dully signposted meeting points, both inside and outside the terminal buildings. At these spots, people with disabilities or reduced mobility can notify of their arrival at the airport and start using the service. The airport also has the staff and material resources to carry out this service. For example, it has 430 adapted seats, 26 special transport vehicles that take passenger from the terminal building to the plane, fourteen vans, and waiting points throughout the terminal building duly set-up.

The facilities are duly adapted to the needs of people with reduced mobility, to guarantee their movement throughout the passenger journey.

ANNEX 3: ANALYSIS OF BEST PRACTICES: BENCHMARKING

This first approach to the current and foreseeable strategic positioning of the Island of Mallorca includes identifying and evaluating best practices that have been implemented in each of the areas of interest, and that will have a greater impact on promoting Mallorca as a tourist destination.

Consequently, specific processes and actions have been assessed based on four main areas of interest

- **Innovation:** One of the main challenges every tourist destination faces today is the use of new technologies in decision-making and establishing specific tourism promotion actions.
- **Sustainability:** As with innovation, sustainability is today one of the basic premises helping to boost destinations and the tourism sector as a whole.
- **Connectivity:** The island of Mallorca is currently an important tourist destination. However, we need to promote it and exploit its capacity to reach and influence other potential markets.
- **Social Responsibility:** Although this is included under sustainability, it is another of the essential aspects worth highlighting in tourism promotion, especially in a pioneering and mature destination such as the Island of Mallorca where a new way of managing tourism is necessary. As a key means to improving reputation, social issues will be of great importance in this new tourism management.

ANX. 3.1 Best practices in innovation

Big Data Applied to Tourism, Tuscany, Italy

INITIATIVE: Vodafone Metadata Big Data Analysis.

GOALS: understand the mobility patterns within the region to design better promotional campaigns linked to each typology of tourist profile.

DESCRIPTION: The idea is to use the data collected by the cell antennas, filter them and analyse them to develop key conclusions and strategies.

RESULTS: Thanks to Vodafone's metadata, new details have been known, as for example, itineraries followed by tourists, transport modes used, etc.

The 4 foreign Tourist profiles travelling to Tuscany are the following:

- Urban tourists: Data from cell antennas show that this travel group use to stay in one city of the region (specially Florence) and they don't move from there during all their stay
- Coast lovers: this group of tourists comes mainly from North Europe, during summer months, and they stay in the coastal are of Tuscany for two weeks.
- Explorers': those are the travellers that move the most around the whole region. They visit both inland and coast and cities areas.
- Inland lovers: they are mainly French, German and Holland tourists, they use private vehicle only within the inland region and normally for one week.



Improvement of Business Competitiveness, Andalusia, Spain.

INITIATIVE: Inventory of tourism products and services

GOALS: promote greater competitiveness in Andalusia's tourism offering and therefore, the Andalusian destination as a whole.

DESCRIPTION: classify tourism products and services to organise the offering and identify where there is a shortage of tourism products and services, or otherwise, territories with too much offer and which need restructuring.

FINDINGS:

- This tool has helped to identify priority action areas;
- A catalogue of resources has been put at the service of the tourism companies' network to help them in their decision-making when creating new potential tourism products;
- Significant benefits have been set up for destination marketing, helping to optimise the organisation and management of events, presence at trade and exhibition fairs, reverse marketing, as well as different communication and marketing strategies expected to be implemented.



Improvement of Business Competitiveness, Andalusia, Spain.

INITIATIVE: product creation. DMCs, Product Clubs, Trails and Routes and the Development of Microsegments

GOALS: promote greater competitiveness in Andalusia's tourism offering and therefore, the Andalusian destination as a whole.

DESCRIPTION: development of communication strategies related that connect with already existing products. Generate and promote products and brands that identify with the real situation in the region.

FINDINGS: partnerships between companies from the same province to create tourism products and experiences that are later sold, thereby increasing companies' business opportunities.

Marketing Initiatives Geared Towards End Users, Andalusia, Spain

INITIATIVE: Social Media Marketing: raising awareness at the destination.

GOALS: promote greater competitiveness and the internationalisation of the Andalusian business network to reach end consumers.

DESCRIPTION: launch of Social Media Plans with social networks (Facebook, Twitter, LinkedIn, Instagram, Pinterest, YouTube) and other new social networks that could be interesting and help attract the millions of users who go on them, to create an excellent online reputation.

FINDINGS: dissemination of the destination and direct and rapid communication with potential customers. Business marketing support and initiatives like contests for fans and followers.



Planning and Smart Tourism, Canary Islands, Spain

INITIATIVE: Planning and Smart Tourism.

GOALS: carry out initiatives aimed at guaranteeing the Canary Islands' tourism brand's communication and marketing activities coherence, as well as that of all its initiatives related to strategic planning up and running in each period.

DESCRIPTION: develop initiatives to increase the generation, access, analysis, management and dissemination of all the data and information that, referring to the tourism industry as a whole, is of value for the Canary Islands' tourism brand and for the stakeholders involved in the management, promotion and/or selling of services, products and destinations linked to it.

FINDINGS:

- maintenance and/or recovery of the market share in key markets;
- an increase in visitor spending at the destination;
- the geographical extension of the economic activity derived from tourism;
- enlargement of tourism activities' value chain;
- a drop in the concentration of risks in traditional source markets;
- a drop in the concentration of risks in segments exclusively related to the traditional sun and beach tourism;
- promotion of direct communication and marketing channels;
- a reputation overhaul of the Canary Islands as a group of tourist destination in their key markets;
- the empowerment of identity as a differentiation tool;
- an enhanced involvement of the Canary Islands' people and social, tourist and economic stakeholders in the competitiveness and sustainability of tourism activity.

Branding, Canary Islands, Spain

INITIATIVE: Branding programme.

GOALS: uplift the Canary Islands' brand image.

DESCRIPTION: carry out campaigns and international branding projects; redefine 'holaislascanarias.com'; create a calendar of online events; manage the brand on the website and social media channels.

FINDINGS:

- a drop in the concentration of risks in traditional source markets and segments exclusively related to the traditional sun and beach tourism;
- promotion of direct communication and marketing channels;
- a reputation overhaul of the Canary Islands as a group of tourist destination in their key markets;
- the empowerment of identity as a differentiation tool;
- an enhanced involvement of the Canary Islands' people and social, tourist and economic stakeholders in the competitiveness and sustainability of tourism activity.
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Destination Branding, Belize

INITIATIVE: The importance of video marketing in Belize's tourism campaigns.

GOALS: improve Belize's digital marketing as a tourist destination by using YouTube videos and social networks like Twitter, Facebook or Vimeo, among others. With the aim that information flows faster and easier through internet and social networks to reach a wider audience.

DESCRIPTION: Belize has positioned itself as an emerging tourist destination thanks to its cultural and natural heritage. Digital marketing was a tremendous boost for the promotion of Belize as a tourist destination, and it was the first country in the area to introduce the video "Discover how to be" on the destination's website. To market the destination more efficiently, the Head of Digital Marketing at the Belize Tourism Institute, identified the most frequent patterns of the entities's YouTube and Vimeo video viewers. Belize is also on other social networks like Facebook, Instagram, Vine or Snapchat and is quite active. All of its digital marketing strategies contemplate the traits of potential customers as well as emerging markets, niche markets or training initiatives to get Belize up to date with digital marketing.

FINDINGS: on YouTube, visits to Belize's channel reached their highest with 287,474. However, this number dropped drastically in the following years, and video comments were scarce. Belize's Tourism Institute uses the Vimeo platform to target very small market segments with very specific profiles in North America. The outcome from digital marketing on Vimeo was very encouraging since, in just eight months, the videos on this platform reached 232,000 views.

ANX. 3.2 Best practices in Social Responsibility

Accessible Tourism, Costa Brava Pirineu de Girona, Spain

INITIATIVE: Costa Brava and Pirineu de Girona's first Accessible Tourism map.

GOALS: for tourist products and services to be enjoyed by anyone in equal conditions, even if they have or don't have a disability,

DESCRIPTION: three thousand accessible maps distributed by the Girona Tourism Board within the frame of its marketing activities and at tourism trade shows, Girona's sixty tourism offices and association for people with disabilities. These are tactile and auditory maps with fifteen accessible tourist attractions in Costa Brava and Pirineu de Girona.

FINDINGS: all fifteen tourist attractions on the maps are accessible to people in wheelchairs. Eight are also accessible for people with visual impairments, three for those with hearing impairments and one for people with mental or cognitive disabilities.

ANX. 3.3 Best practices in Sustainability

Sustainable Tourism, Gozo, Malta

INITIATIVE: Eco-Gozo project

GOALS: the goal is to make Gozo a sustainable community, environmentally, socially and economically. The protection of Gozo's people's way of life, environment, cultural resources, and identity are key to helping Gozo become a sustainable destination. This will also help boost the importance of tourism on the island.

It is a political initiative and a strategy put into place by the Ministry of Gozo. The municipality also joined the Covenant of Mayors that promotes thorough audits to improve energy efficiency and carbon footprints.

DESCRIPTION: Reduce energy consumption and improve efficiency by using LED lighting throughout the island. This pilot project, funded partly by the European Union and coordinated by Malta's Ministry for Energy, involves upgrading a total 3900 low-pressure sodium street lights with the latest LED technology lamps. These new LED lamps provide a white, more focused light that uses a fraction of their older counterparts' energy with a longer life-span.

FINDINGS: Perfect visibility at night for motorists, cyclists and pedestrians. Greater efficiency, more safety and security, and better quality of life in urban areas.



Lanzarote Smart Biosphere Reserve, the Canary Islands, Spain

INITIATIVE: “Smart Island Lanzarote Smart Biosphere Reserve”.

GOALS: this project’s primary goal is to turn Lanzarote into a Smart Tourist Destination to become a more sustainable destination thanks to the use of technology. One of this project’s specific goals is for a Digital Tourism Channel for visitors and tourism stakeholders to be set up by 2023. Tourists will be able to access the island’s complete catalogue of tourist products and services. With this initiative, Lanzarote will count with the best islands’ sustainability management as a tourism destination which informs tourists on the impact they produce related their carbon footprint.

DESCRIPTION: Lanzarote is an island with incredible biodiversity and rich landscapes and ecosystems, but it is also a consolidated tourist destination. Therefore, it is necessary to implement measures that will enhance tourist experiences and sustainable management on the island. The following are some of the environmental protection measures put into place thanks to the good use of technology:

- The creation of the Atlantic Museum Coastal Observatory
- The creation of systems to monitor, protect, preserve and manage all of the islands diving sites, the Arrecife Marina and the Chinijo Marine Reserve
- The opening of the Fermina Islet Island Innovation Centre in 2019 to collect data on tourist behaviour using the Lanzarote Smart Biosphere Reserve Platform, and the capacity-building programme

FINDINGS: make tourists aware of the need to protect and preserve the environment and the island's ecological riches, gain access to information on the impact human activity has on its marine ecosystems and learn more about the evolution of the Canary Islands’ climate and increase efficiency in public cleaning and waste collection systems.

ANX. 3.4 Best Practices in Connectivity

Connectivity, the Canary Islands, Spain

INITIATIVE: Connectivity programme.

GOALS: Continuously promote better air connectivity between the islands and their different markets, primarily scheduled flights.

DESCRIPTION: management of the Flight Development Fund; Promote the Canary Islands' different advantages with airline companies; dialogue with AENA, airline companies and airports outside of the Canary Islands to set up new routes.

FINDINGS: maintenance and/or recovery of market share in crucial markets; less concentration of risks in traditional source markets; stronger direct communication and marketing channels.

