



Businesses and Cities of the Mediterranean

Engines of Innovation, Cohesion and Peace

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Regional government and private sector in sustainable tourism in the Balearic Islands

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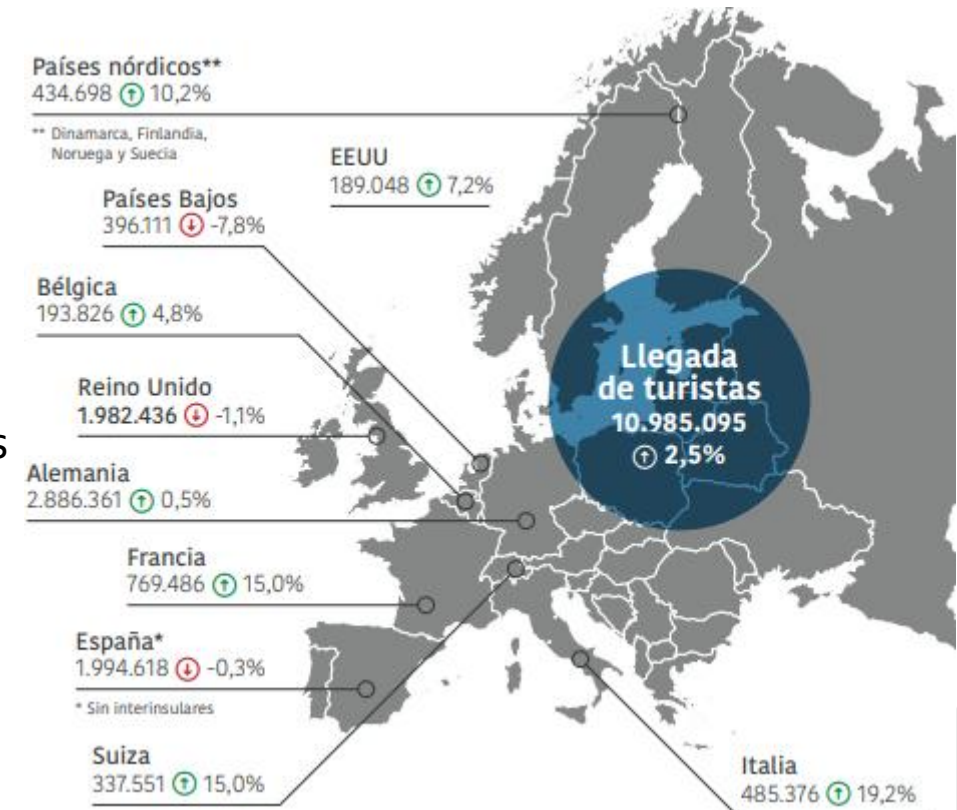
Regional government and private sector in sustainable tourism in the Balearic Islands

**GROW MORE IN
VALUE THAN VOLUME**

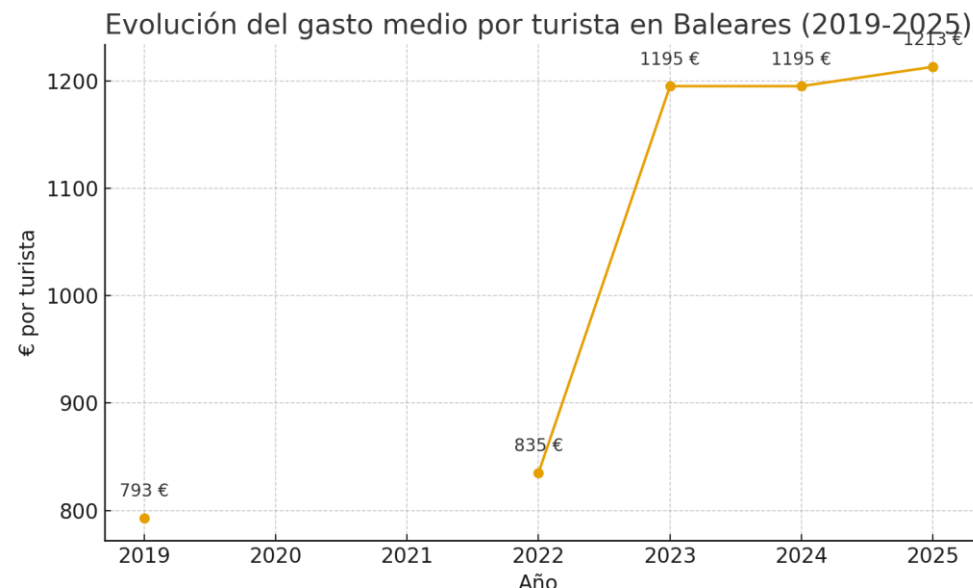
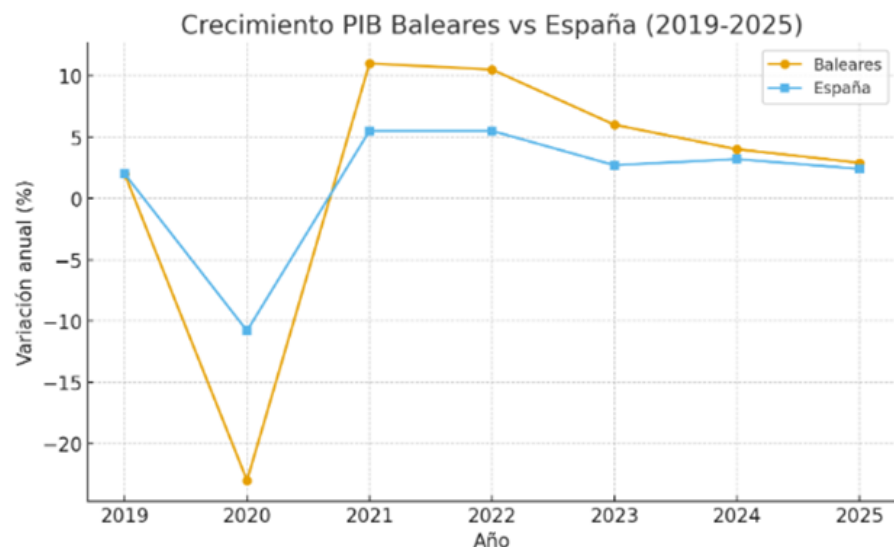


GROW MORE IN VALUE THAN VOLUME

- Balearic Islands GDP 2024: **+4.0%** vs. Spain +3.2%
- Balearic Islands close the first quarter of 2025 with a **+3.4%**
- Tourism represents **45% of the Balearic Islands' GDP**
- **Tourist arrivals:** 10,985,095 (aggregated data from July 2025)
↑ 2.5%
- **Growth in value:** average tourist spending (as of July 2025) rises to €1,180.8 per person (↑ 2.1%) and €202.6 per person per day (↑ 5.9%).
- **Climate change** and new trends: adapting tourism to water scarcity and extreme weather, while customers increasingly demand more sustainability and responsible experiences.



GROW MORE IN VALUE THAN VOLUME



Illes Balears

Datos acumulados
julio 2025*



Demanda energética

3.586.821,4
⬆️ 4,9%

Gasto de los turistas



Total (millones de €)
12.971,6 €
⬆️ 4,7%



Por personas
1.180,8 €
⬆️ 2,1%



Por persona y día
202,6 €
⬆️ 5,9%



Pernoctaciones
64.018.604
⬇️ -1,1%



Estancia media
5,8
⬇️ -3,6%



Transformation of the hotel sector in Mallorca

- **4-5 star hotels: from 33% (2014) to 72% (2024).** Legal framework: Law 8/2012 (Delgado Law) of July 19, 2012 – key legislative framework.
- Total **investment** in renovations **>€3 billion** (according to sector estimates)
- **Calvià–Magaluf:** nearly 80% of 4-5 star hotels. Conversion to **diversify the market**. Decree-Law 2/2024 on **Responsible Tourism** as a regulatory framework



840
HOTELS

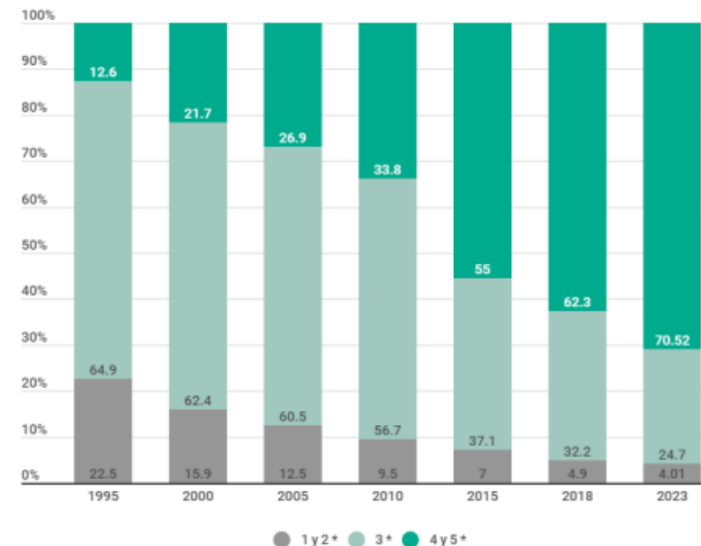
+50
YEARS
EXPERIENCE

aprox.
3000 M €
INVESTED IN
HOTEL
REFURBISHMENT

70%
FACILITIES
REFORMED



200.000
HOTEL BEDS



From 1993 until today, 4 and 5-star hotel beds has been increased fivefold.

x5

in within 30 years
From 12 % to 70 %



Transformation of the hotel sector in Mallorca

Strategy:

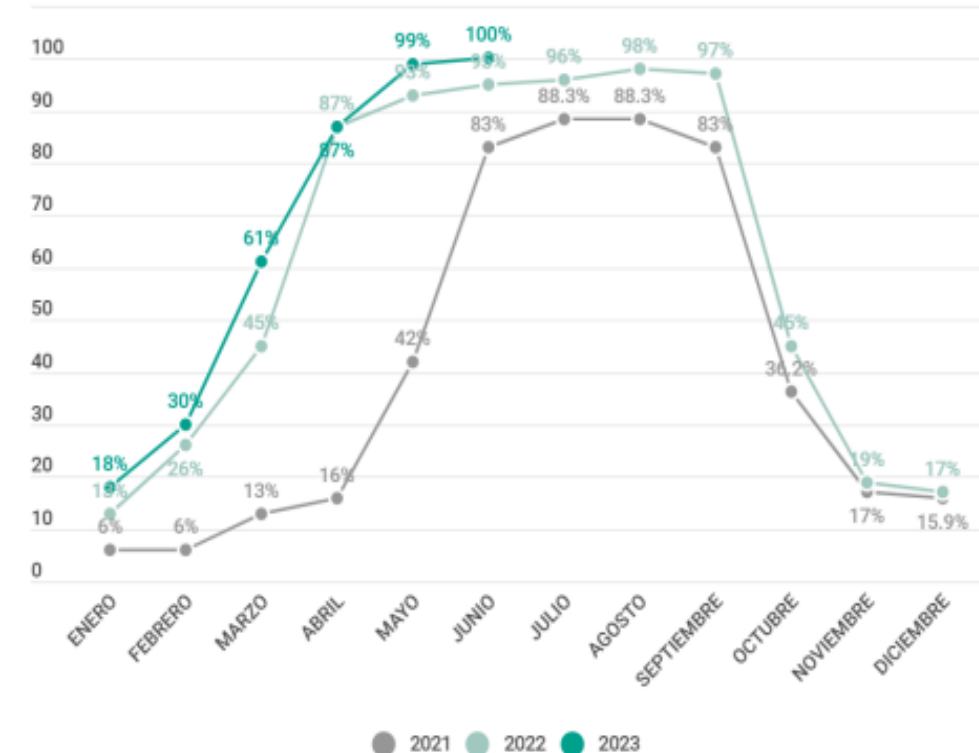
- **Circular hotels** (Impulsa Foundation).
- **Tourism Law 3/2022**: circularity plans and commitment to local products.
- **Mallorca Chamber of Commerce** (Mallorca CC): active collaboration in the **Local Product campaign** of the regional government and participation in European programs such as **MESA** and **REVIVE**, and **I-STAR** project to promote the sustainable transformation of tourism SMEs.
- **Deseasonalization**: extension of the season from 6 to 9 months, workforce stabilization. (Graph attached)
- **Training and reskilling**: Mallorca CC collaborates in European initiatives such as **Going Live** and **Talent** programs (-29 years and +45 years)
- **Climate Change Law 2018**:
 - Promotion of **electric mobility**. Growth in the share of electric cars in the Balearic Islands; from 7% in 2022 to 14.8% in 2025. Compared to 9.6% in 2025 nationwide.
 - Collaboration of the Mallorca CC in the EE4HORECA project on **energy efficiency** for the HORECA sector
 - **Waste Law 2018**: elimination of single-use and single-dose plastics

mercado vehículos eléctricos puros España

nacional
Baleares

'22	'23	'24	'25 (agosto)
4	5,8	6,6	9,6
7	9,4	9	14,8

Year by year hotels open earlier

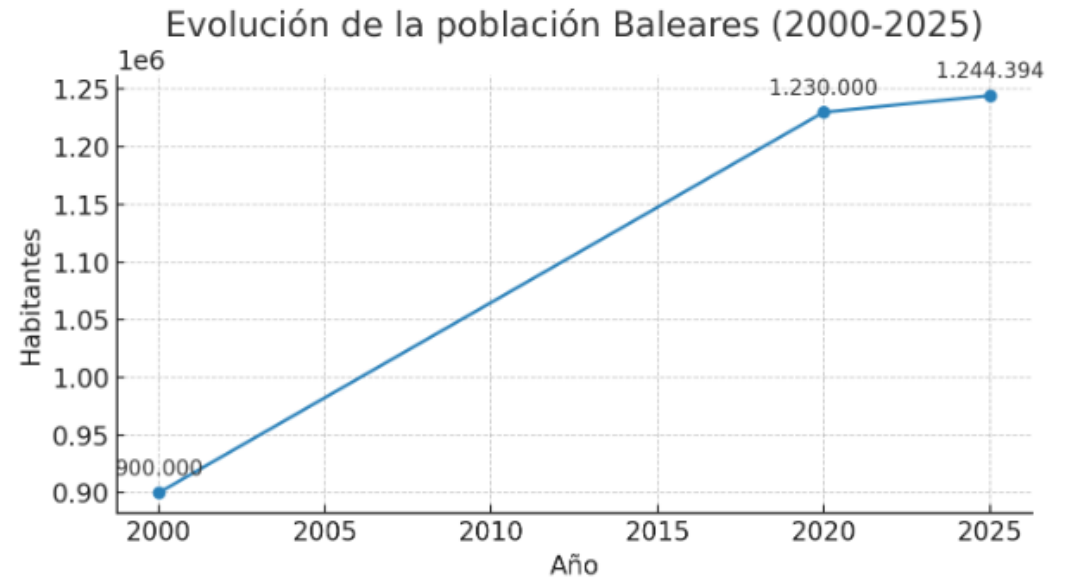


Housing (in the spotlight)

- **Population growth** +42% in 20 years in the Balearic Islands.
- Inhabitants as of July 1, 2025: **1,251,086**.
- Estimated need for **30,000 homes** by 2025.
- **Legal holiday housing** growth 157% in the last 8 years.
- **Illegal holiday housing** in some areas exceeds legal one.

Actions in practice:

- Consell de Mallorca: Series of interventiona and increased control of illegal holiday housing supply.
- Enable accommodation from the own hotel plant for staff. Cover staffing and retain talent.
- Agreement of IBAVI Young Mortgage program with the Mallorca CC to cover 100% of the mortgage.



Alignment and evolution

- **XVII Collective Agreement 2025-2028:**
 - Signed for 180,000 workers in the sector with a salary increase of **13.5%** over the next three years.
 - The cumulative wage increase was 34% over 10 years.
- **Public-private partnerships:** Foundation Impulsa Balears (a great ally as a strategic knowledge platform that facilitates decision-making in matters of productive transformation) and Nest ESG (a driving promotor of sustainable tourism culture in Mallorca).
- **Social and Political Pact for Economic, Social, and Environmental Sustainability of the Balearic Islands. May 2024.**
 - With 247 identified objectives (to reduce environmental pressure, improve the population well-being, preserve natural resources, challenges of climate change...)
- **Social and Political Pact for Sustainability Working Group**, which seeks coexistence between residents and tourism and addresses social, environmental, and economic issues. Participatory structure with 12 working groups, reorganized into 5 groups that link to the main five objectives. Mallorca CC participates.



**PACTO SOCIAL Y POLÍTICO
POR LA SOSTENIBILIDAD
DE LAS ILLES BALEARS**

We continue transforming ourselves!

