TOURIST ARRIVALS

TOTAL FLOW

% Annual concentration

<table>
<thead>
<tr>
<th>Year</th>
<th>T. ALTA</th>
<th>T. MEDIA</th>
<th>T. BAJA</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>61.9%</td>
<td>31.7%</td>
<td>6.4%</td>
</tr>
<tr>
<td>2017</td>
<td>59.9%</td>
<td>33.3%</td>
<td>6.8%</td>
</tr>
<tr>
<td>2019</td>
<td>58.9%</td>
<td>33.2%</td>
<td>7.9%</td>
</tr>
<tr>
<td>2020*</td>
<td>59.9%</td>
<td>13.1%</td>
<td>27.0%</td>
</tr>
</tbody>
</table>

MÁXIMA CONCENTRACIÓN

<table>
<thead>
<tr>
<th>Year</th>
<th>JUL-AGO</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>34.5%</td>
</tr>
<tr>
<td>2017</td>
<td>32.4%</td>
</tr>
<tr>
<td>2019</td>
<td>31.1%</td>
</tr>
<tr>
<td>2020</td>
<td>50.7%</td>
</tr>
</tbody>
</table>

HIGH S.: June, July, August, September; MIDDLE S.: March, April, May, October; LOW S.: January, February, November, December.

* Data for 2020 are not included in the chart due to the exceptional circumstances of the activity.

Source: own preparation based on INE data
TOURIST ARRIVALS

MAIN MARKETS

HIGH S.: June, July, August, September; MIDDLE S.: March, April, May, October; LOW S.: January, February, November, December.

Source: own preparation based on INE data
TOURIST ARRIVALS

FOREIGN

HIGH S.: June, July, August, September; MIDDLE S.: March, April, May, October; LOW S.: January, February, November, December.

* Data for 2020 are not included in the chart due to the exceptional circumstances of the activity.

Source: own preparation based on INE data.
TOURIST ARRIVALS

HIGH S.: June, July, August, September; MIDDLE S.: March, April, May, October; LOW S.: January, February, November, December.

* Data for 2020 are not included in the chart due to the exceptional circumstances of the activity.

Source: own preparation based on INE data.
INTERNATIONAL TOURISM

ACCOMMODATION

HIGH S.: June, July, August, September;
MIDDLE S.: March, April, May, October;
LOW S.: January, February, November, December.

Source: own preparation based on INE data
INTERNATIONAL TOURISM
HOTELS AND THE LIKE

HIGH: June, July, August, September.
MIDDLE: March, April, May, October.
LOW: January, February, November, December.

* Data for 2020 are not included in the chart due to the exceptional circumstances of the activity.

Source: own preparation based on INE data

MÁXIMA CONCENTRACIÓN

<table>
<thead>
<tr>
<th>Year</th>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>JUL-AGO</td>
<td>34,3%</td>
</tr>
<tr>
<td>2019</td>
<td>JUL-AGO</td>
<td>36,1%</td>
</tr>
<tr>
<td>2020</td>
<td>JUL-AGO</td>
<td>65,6%</td>
</tr>
</tbody>
</table>

% Annual concentration

<table>
<thead>
<tr>
<th>Year</th>
<th>T. ALTA</th>
<th>T. MEDIA</th>
<th>T. BAJA</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>68,6%</td>
<td>29,1%</td>
<td>2,3%</td>
</tr>
<tr>
<td>2019</td>
<td>67,5%</td>
<td>30,0%</td>
<td>2,5%</td>
</tr>
<tr>
<td>2020*</td>
<td>74,3%</td>
<td>9,4%</td>
<td>16,3%</td>
</tr>
</tbody>
</table>
INTERNATIONAL TOURISM

RENTAL HOUSING

HIGH S.: June, July, August, September.
MIDDLE S.: March, April, May, October.
LOW S.: January, February, November, December.

* Data for 2020 are not included in the chart due to the exceptional circumstances of the activity.

Source: own preparation based on INE data.

% Annual concentration

<table>
<thead>
<tr>
<th>Year</th>
<th>T. ALTA</th>
<th>T. MEDIA</th>
<th>T. BAJA</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>64.6%</td>
<td>30.9%</td>
<td>4.6%</td>
</tr>
<tr>
<td>2019</td>
<td>61.2%</td>
<td>33.6%</td>
<td>5.2%</td>
</tr>
<tr>
<td>2020*</td>
<td>76.3%</td>
<td>11.8%</td>
<td>11.9%</td>
</tr>
</tbody>
</table>

MÁXIMA CONCENTRACIÓN

<table>
<thead>
<tr>
<th>Year</th>
<th>JUL-AGO</th>
<th>JULIO</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>39.9%</td>
<td>JULIO</td>
</tr>
<tr>
<td>2019</td>
<td>31.2%</td>
<td>JULIO</td>
</tr>
<tr>
<td>2020</td>
<td>68.3%</td>
<td>JULIO</td>
</tr>
</tbody>
</table>
INTERNATIONAL TOURISM
OWNED HOUSING

HIGH:
June, July, August, September;
MIDDLE:
March, April, May, October;
LOW:
January, February, November, December.

Source: own preparation based on INE data

* Data for 2020 are not included in the chart due to the exceptional circumstances of the activity.
HOTEL ACTIVITY

OVERNIGHT STAYS

HIGH S.: June, July, August, September.
MIDDLE S.: March, April, May, October.
LOW S.: January, February, November, December.

* Data for 2020 are not included in the chart due to the exceptional circumstances of the activity.

Source: own preparation based on INE data.
ACTION PLAN 20-21

PROMOTION OF DESTINATION

Co-marketing activities as a destination in conjunction with the private sector.

Objectives

- Encourage the promotion of the destination in **middle and low season**.
- Promote our **main products**.
- Activate the **desire to travel** to Majorca.
- Support the **private sector** in the promotion of its product in our destination.
Budget of €1,000,000 for co-marketing activities in 2020 (majorca-private sector).

This strategy is expected to continue in 2021 with a budget of €450,000.

Aimed especially at covering all areas of the value chain and our main markets:

- TTOO, AAVV, OTA’s
- Bedbanks
- Generic and/or product receptive agencies
- Tourist accommodation
- Tourist portals
**ACTION PLAN 20-21**

**PROMOTION OF DESTINATION**

**SPONSORSHIPS: LARGE AND SMALL EVENTS**

Call for Sponsorship of events and promotional activities for the private sector.

€1.1 million that will be expanded

**CITY COUNCILS CALL FOR SUBSIDIES**

Subsidies for promotion and advice for city councils and associations of municipalities on marketing and systematized tourism positioning.

450,000
Objective: To provide support to municipal tourist information services in order to enhance universal accessibility, promote modernization and foster technological innovation.

The 2021 call triples the amount of aid for tourist information, from €150,000 to €450,000.

Excellence in the management of municipal tourism agents is encouraged by promoting tourism strategy or brand development plans.

The dissemination of municipal heritage is promoted by offering support for the creation and updating of tourist content and the acquisition of multimedia content.

Technological innovation is promoted by improving the computer equipment of tourist offices, automated counting systems and social wifi services.
Majorca has segmented its entire offer by product.

This is channeled through public/private working groups that channel and coordinate all promotional and marketing activities related to the product.
PROMOTION SEGMENTED BY PRODUCT

8 WORK TABLES

Sports
Active
Mice
Nature
Culture
Heritage
Premium
Gastronomy

mallorca
in the middle of the Mediterranean
SPORTS TOURISM

GENERAL DATA

+ 200 sports facilities available to tourists.

Broad sports agenda with more than 40 multisport events with a tourism focus.

Accommodation possibilities and specialized tourist packages.

Companies specializing in events and sporting experiences on the island.
General Data:

- **+130** specialized tourist establishments.
- **3 to 5** star hotels and aparthotels.
- **Agrotourism and inland rural hotels.**
- **+70** specialized companies offering bicycle tourism services in Majorca.
- **+20,000** bicycles for rent. Average weekly rental prices close to €160.
BICYCLE TOURISM

GENERAL DATA

+150 suppliers offering bicycle tourism packages in Majorca as a cyclotourist destination.

+ 2,000 Km of signposted routes.

13 events with international impact.
BICYCLE TOURISM

BICYCLE TOURISM AND PRODUCT PROFILE

- **250,000 Cycloturists per year** (strava data + strava user data participating in cycling events).
- **6.7 days** of average stay.
- **€140 average** daily expenditure per cyclotourist.
- **€190 average expenditure** per cyclotourist attending a sporting event.
BICYCLE TOURISM

BICYCLE TOURISM AND PRODUCT PROFILE

PROFILE

SEASONALITY

Amateur

30%

FEB-MAY

Professionals

November 15 to February 15

70%

SEPT-NOV
BICYCLE TOURISM

TRENDS

- Strong increase in **women as users**, which changes the profile of the type of customer.
- Increase in the supply of **electric bicycles**, which increases the age range of potential customers.
- Increase in demand for **mtb and gravel trails**.
- The tendency is to **rent** rather than to travel with your own bicycle, thanks to the wide offer and the quality of the services provided (specialization of the offer).
- Participation in international **sporting events** (in Majorca we have 7 cycling events and 6 triathlon events).
24 golf courses with a wide range of courses to suit all levels.

+50 specialized tourist establishments.

4 to 5 star hotels and aparthotels.

Agrotourism and inland rural hotels.

Strong corporativism and associationism of the sector, with active participation of the acgm and the federation in the generation of activity.

Economic impact of €167 million
GOLF

GENERAL DATA

Economic impact of €167 million

- 45% Practice of sports
- 39% Accommodation
- 13% Catering

6 days of average stay

mallorca in the middle of the mediterranean
GOLF

GENERAL DATA

- 43% German
- 14% UK
- 11% Nordic
- 4% Swiss
- 1.6% Austrian

PROFILE

- 43% German
- 14% UK
- 13% Nordic
- 4% Swiss
- 1.6% Austrian

SEASONALITY

- 47% Middle Season
- 24% Low Season
- 29% High Season
ACTIVE TOURISM

GENERAL DATA

+150 Service Companies

Multi-product possibilities within the destination:

Sea (all types of nautical and aquatic activities)
Land (hiking, nordic walking...)
Mountain
Speleology/diving speleology
Climbing/canyoning (climbing, canyoning, psicobloc...)
Air (balloon flights, paragliding, paramotor...)
ACTIVE TOURISM

GENERAL DATA

- Strong specialization of guides.
- Year-round offer possibilities due to diversification.
- Strong economic impact on local companies.
NAUTICAL TOURISM

GENERAL INFORMATION BALEARIC ISLANDS

- Economic impact: 450 m €
- 3,000 Direct jobs
- 650 companies working directly for the nautical Industry.
NAUTICAL TOURISM

GENERAL INFORMATION BALEARIC ISLANDS

Marinas and yacht clubs.
See protected areas around Mallorca.
Diving centers.
Fishing companies.

35
8
40
10
NAUTICAL TOURISM

GENERAL INFORMATION BALEARIC ISLANDS

- **250 Service suppliers:**
  - F&B (on board catering)
  - Excursions and tourism suppliers
  - Yacht Services
  - Crew agencies
  - Etc.

- **Yacht construction companies:** Mallorca has some of the most reputable companies in the world.
NAUTICAL TOURISM

GENERAL INFORMATION BALEARIC ISLANDS

Full schedule of nautical events:

- Palma Boat Show
- Palma Superyacht
- Palma International Boat Show
- Princess Sofia Iberostar Trophy
- Copa del Rey
- Palma Vela
MICE TOURISM

GENERAL INFORMATION BALEARIC ISLANDS

- **420**: Spaces for meetings and conferences
- **60,000 sqm**: Of spaces in venues for meetings and conferences
- **44**: General DMC’s
- **Specialized DMC’s**
MICE TOURISM

GENERAL INFORMATION BALEARIC ISLANDS

33 Convention spaces

33 Special Majorcan venues

PMI Airport (10 minutes away from the city centre:

- 77 Operating Airlines
- 33 Countries
- 444 Routes
- 175 Destinations
THANKS