“Strategies to reduce seasonality in Mediterranean destinations. Application to German tourism in the Balearic Islands”

T-Forum 2018 (Palma -March 2018)

E. Aguiló, F. Sastre (University of Balearic Islands, UIB)
Tourism seasonality Spain
## Tourist Arrivals According to Island and Country of Residence (2015)

<table>
<thead>
<tr>
<th>País</th>
<th>Mallorca 2015</th>
<th>%Var. 15/14</th>
<th>Menorca 2015</th>
<th>%Var. 15/14</th>
<th>Eivissa-Formentera 2015</th>
<th>%Var. 15/14</th>
<th>Illes Balears 2015</th>
<th>%Var. 15/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alemania/Allemagne/Germany</td>
<td>3,747,198</td>
<td>0,4%</td>
<td>71,785</td>
<td>-1,4%</td>
<td>313,730</td>
<td>-7,9%</td>
<td>4,132,713</td>
<td>-0,2%</td>
</tr>
<tr>
<td>Regne Unit/Reino Unido/United Kingdom</td>
<td>2,250,700</td>
<td>3,9%</td>
<td>492,583</td>
<td>8,7%</td>
<td>790,492</td>
<td>3,2%</td>
<td>3,533,775</td>
<td>4,4%</td>
</tr>
<tr>
<td>Païses nòrdics/Países nórdicos/Nordic countries</td>
<td>716,125</td>
<td>-5,6%</td>
<td>21,717</td>
<td>-15,2%</td>
<td>16,595</td>
<td>18,8%</td>
<td>754,438</td>
<td>-5,5%</td>
</tr>
<tr>
<td>Itàlia/Italia/Italy</td>
<td>209,478</td>
<td>28,3%</td>
<td>116,037</td>
<td>20,1%</td>
<td>370,795</td>
<td>2,2%</td>
<td>696,311</td>
<td>11,8%</td>
</tr>
<tr>
<td>Benelux/Bélgica/Belgium</td>
<td>382,726</td>
<td>4,7%</td>
<td>20,930</td>
<td>2,5%</td>
<td>210,733</td>
<td>1,8%</td>
<td>614,389</td>
<td>3,6%</td>
</tr>
<tr>
<td>França/ Francia/ France</td>
<td>372,318</td>
<td>14,1%</td>
<td>49,129</td>
<td>45,1%</td>
<td>103,075</td>
<td>-12,3%</td>
<td>524,522</td>
<td>9,8%</td>
</tr>
<tr>
<td>Altres internacional/Otros internacionales/Other international</td>
<td>1,108,368</td>
<td>4,3%</td>
<td>38,859</td>
<td>22,8%</td>
<td>246,873</td>
<td>5,6%</td>
<td>1,394,100</td>
<td>4,9%</td>
</tr>
<tr>
<td>Internacional/ Internacional</td>
<td>8,786,914</td>
<td>2,5%</td>
<td>811,041</td>
<td>10,4%</td>
<td>2,052,293</td>
<td>0,6%</td>
<td>11,650,249</td>
<td>2,7%</td>
</tr>
<tr>
<td>Nacional/Nacional/Domestic</td>
<td>1,193,566</td>
<td>10,9%</td>
<td>452,906</td>
<td>11,6%</td>
<td>713,962</td>
<td>2,9%</td>
<td>2,360,434</td>
<td>8,5%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>9,980,480</strong></td>
<td><strong>3,4%</strong></td>
<td><strong>1,263,948</strong></td>
<td><strong>10,8%</strong></td>
<td><strong>2,766,255</strong></td>
<td><strong>1,2%</strong></td>
<td><strong>14,010,682</strong></td>
<td><strong>3,6%</strong></td>
</tr>
</tbody>
</table>
Passenger monthly evolution (in thousands) broken down by type of transfer in the Balearic Islands (2015)
• SEASONALITY : Key Factor
ADR

January | February | March | April | May | June | July | August | September | October | November | December

Costa del Sol | Mallorca | Ibiza | Costa Blanca

0 | 50 | 100 | 150 | 200 | 250
<table>
<thead>
<tr>
<th>POLICIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor costs reduction</td>
</tr>
<tr>
<td>Tax deductions</td>
</tr>
<tr>
<td>Administrative regulations reduction</td>
</tr>
<tr>
<td>Administrations to collaborate in off-season promotion</td>
</tr>
<tr>
<td>Administrations to collaborate in product diversification</td>
</tr>
<tr>
<td>Information to hotels about product preferences</td>
</tr>
<tr>
<td>Administrations to collaborate in market diversification</td>
</tr>
<tr>
<td>Administrations to collaborate in facilitating coordination</td>
</tr>
</tbody>
</table>
Preliminary results (1)

Seasonality policies importance

<table>
<thead>
<tr>
<th></th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor costs reduction</td>
<td>5.7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax deductions</td>
<td>5.8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative regulations reduction</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrations to collaborate in off-season promotion</td>
<td>5.5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrations to collaborate in product diversification</td>
<td>5.4</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Information to hotels about product preferences</td>
<td>4.3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrations to collaborate in market diversification</td>
<td>6.09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrations to facilitate coordination</td>
<td>5.7</td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>
4. Preliminary results (2)

**Seasonality policies satisfaction**

<table>
<thead>
<tr>
<th>Policy</th>
<th>Satisfaction Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor costs reduction</td>
<td>2.8</td>
</tr>
<tr>
<td>Tax deductions</td>
<td>2.44</td>
</tr>
<tr>
<td>Administrative regulations reduction</td>
<td>3.26</td>
</tr>
<tr>
<td>Administrations to collaborate in off-season promotion</td>
<td>2.8</td>
</tr>
<tr>
<td>Administrations to collaborate in product diversification</td>
<td>2.87</td>
</tr>
<tr>
<td>Information to hotels about product preferences</td>
<td>2.57</td>
</tr>
<tr>
<td>Administrations to collaborate in market diversification</td>
<td>2.31</td>
</tr>
<tr>
<td>Administrations to facilitate coordination</td>
<td>2.22</td>
</tr>
</tbody>
</table>
4. Preliminary results (3)

Policies effects on the probability to extend the season

- Labor costs reduction: 5.13
- Tax deductions: 4.96
- Administrative regulations reduction: 5.42
- Administrations to collaborate in off-season promotion: 4.98
- Administrations to collaborate in product diversification: 4.87
- Information to hotels about product preferences: 4.09
- Administrations to collaborate in market diversification: 5.67
- Administrations to collaborate in facilitating coordination: 5.5
THANKS

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