8th INTERNATIONAL FORUM ON TOURISM STATISTICS (Call for papers)

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PAPER TITLES

International indicator of touristic position competitiveness of the Balearic Islands for 2000-2005, and projection of touristic position competitiveness for 2010.

(Research Paper)

PAPER ABSTRACT

This Research Paper offers significant and original results, obtained through different methodologies to collect information, about the economic weight of tourism in the Balearic Islands. First, we offer a new price indicator of competivity for 2000-2005 period, and second, a projection for 2010, given current parameters.

To calculate this price indicator of touristic competitivity positions of the Balearic Islands for the 2000-2005 period, we apply two significant methodological innovations: we identify the 21 main competitors markets calculate his competitive in relation to Balearic Islands. We also used the Delphi method with a group of distinguished experts in Balearic tourism, which allowed us to calculated the price indicator of touristic position competitivity, as composed by the variation of the relative index price of consumers and the relative variation of the exchange rate. This indicator provides a very well tuned grasp of the conjectural tourist cycle of the Balearic Islands and could serves a very effective technology to foresee how the cycle evolve in the future.

To this aim, we projected its evolution to 2010 also through the Delphi method to distinguished experts in Balearic tourism. Their answers to a basic questionnaire on actual strong competitivity of this 21 main competitor markets and their evolution, allowed us to calculated their respective position in 2010.

Thise research has been supported by the Economic Social Council of Balearic Islands, the unique public Institution whose memberships involves all the representatives enterpreneurial associations and Unions, as well as representatives of social organisations, local administration and the University.

METHODOLOGY

The competitiveness indicators can be classified in two types. Most of quantitative indicators of competitiveness are based on the relative evolution of prices and most of the qualitative indicators make reference to human factor, to structures development, environment, technological development, human resources, increasing tourism and social development.

Quantitatively, the competitive tourist position indicator in prices (IPCT) is based on the relative variation of the Consumpcion Price Index (IPC) and the relative variation of the rates of nominal change (TCEN) that the tourists will find in the Balearic Islands. It is therefore a dynamic indicator, since it measures the relative variation of the prices and the types of change throughout the time, but in no case considers the absolute differentials of these variables in a determined moment.

The competitive tourist position indicator in prices (IPCT) that is presented here incorporates at the same time an important new feature in relation to previous Spanish studies for solving two questions that are not smaller in this type of study: the election of the competing markets and their competitive capacity versus the Balearic Island.

Both questions have been solved by the consultation Delphi method applied to balearic tourism experts. The qualitative analysis of the evolution of the competitive position of the competing destinations of the Balearic Island for horizon 2010 has been solved also by the Delphi method.

USER VALUE/APPLICATION CONTEXT

1. Business Tourism
2. Area to identify the different methodologies to collect information

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COMPETITIVENESS OF THE BALEARIC ISLANDS' TOURISM SECTOR[1]

Ferran Navinés and Vicenç Tur.

1. INTRODUCTION

This research project on the Competitiveness of the Balearic Islands' Tourism Sector is the response to a challenge proposed in a previous study that was also published by the Social and Economic Council of the Balearic Islands in 2004, under the title, *Comportamiento de la productividad y la competitividad en las Islas Baleares* [Behaviour of Productivity and Competitiveness in the Balearic Islands]. The introduction of such project reads:

"We believe that among the many valid and complementary approaches to productivity and competitiveness, whether collective or sectoral, perhaps the strongest analytical and explanatory future approach to an economy such as that of the Balearics is one that considers sectoral competitiveness (industry perspective). This assertion moreover takes into account the limited magnitude of the Balearic economy, its intense internationalisation and its specialisation in the tourism sector".

Thus, for the first time, this research project presents the evolution of the Competitive Price Position Index for Tourism in the Balearic Islands. This index offers insight as to the increases and decreases in the prices of Balearic tourism in relation to those of its competitors, thus respectively indicating the decline or improvement of the competitive position of Balearic tourism. Before we can view the evolution of the prices of competitive destinations, we must first identify the group of competitors of relevance to the Balearic Islands and also establish a mean for all of those prices, weighting each price according to the competitive capacity of each of the competitors considered. For the first time in Spain, those competitors have been identified and weighted through a Delphi consultation with sector experts.

Thanks to the availability and knowledge of the experts, this consultation has enabled us to calculate the Competitive Position Index for Tourism with reliable weightings and therefore determine the evolution of the competitive position of the Balearic tourism supply for the 2000-2005 period.

In fact, the experts' participation was so positive that in addition to the weightings required by the index, it was also possible to attain an idea of the trends in 2010 of the different tourism destinations that compete with the Balearics, and subsequently to introduce a highly important element in the study of tourism competitiveness: an approach to the quality of the different supplies. In keeping with the guidelines of the World Tourism Organization and other international bodies, the approach to quality was multidimensional, with twelve variables, taking into account the prices and quality of the basic and complementary tourism supply and the setting relevant to the tourists.

[1] This paper presents the highlights of the research project on the competitiveness of the Balearics' tourism sector, which was sponsored by the Social and Economic Council of the Balearic Islands, and published by such institution at the start of 2006 (http://web2.caib.es/cesfront/fitxer.do?document=403). The authors of the research project were Àlex Costa, Cèlia Gomà, Xavier López and Ferran Navinés. The CES *Conseller* Mr. Vicenç Tur chaired the Work Committee on Economy, Regional Development and Environment, which has sponsored the project.

Today competitiveness is a commonplace topic of discussion, both in the business and academic world, and in the world of politics. Yet only occasionally do we find a quantitative appraisal of competitiveness and a detailed explanation of it. We believe that this study responds to many relevant questions, such as whether or not the Balearic tourism supply is becoming more or less competitive in price, while pinpointing its main competitors and their respective strengths.

We believe that in addition to answering such important questions, this study also provides the framework for the formulation of and response to new questions relating to methodology, economic analysis and business.

Some of the methodology issues relate to the construction of the Competitive Position Index for Tourism. The prices used in this report are those of the Consumer Price Index (CPI). These prices are known for all of the destinations, and there is no doubt that they concur to a large extent with tourism supply production costs and therefore with the specific prices of such supply. Nevertheless, from the methodological standpoint it is useful to consider whether the evolution of this index would be sensitive to the use of other price indices in addition to the CPI. For example, package prices, for standardized supplies, of all the competitive destinations in all of the outbound markets. A second question is linked to the price weightings in each case. Here, a qualitative weighting derived from a Delphi expert consultation was used. We felt this was an ideal option. In any case it may be of interest to ask ourselves if the results obtained would be very different if we were to use objective weightings taken from the holidays of all the outbound places in all the competitive destinations. However, this matter will need to be explored and addressed in future studies.

We hope to see this very appropriate initiative of the Social and Economic Council of the Balearic Islands catch on and continue, as this will enable us to answer these and other questions within the framework of a stable and ongoing research programme on the study of tourism competitiveness. We feel this knowledge is essential to the study and establishment of future policies for the economy of the Balearic Islands.

We cannot end this introduction without expressing our gratitude to the Economic and Social Council, and very especially to the experts that took part in the Delphi consultation session, who later marked the destinations with the explanatory factors. Obviously, if the information provided is significant and solid, it is thanks to their wisdom, which we have comprehensively arranged and presented.

Given the key role that these experts played in our study, below is a list of those who contributed to the report on the competitiveness of the Balearic Islands' tourism sector:

DELPHI MEETING 27/05/2005: Mr. Raimundo Alabern de Armenteras. Director IBATUR (Balearic Institute of Tourism); Mr. Esteve Bardolet Jané. FOMENTO DE TURISMO (Tourism Promotion); Mr. Bartomeu Bestard Figuerola; President ANADE (Balearic Sports Marina Facilities Association); Mr. Carlos Bravo Bay. Advisor AECA (Spanish Association of Air Companies); Mr. Ángel Cogolludo Pastor. Financial Director EROSKI Center SYP; Mr. Joan Ignasi Esteve Pla. First Vice President MALLORCA HOTEL BUSINESS FEDERATION (FEHM); Mr. Víctor Fernández Canosa. Manager Association of the Balearic Travel Agencies (AVIBA); Mr. Miguel A. Fornés Nombela. Executive Vice President Agrupación Cadenas Hoteleras (Hotel Chain Association); Mr. Mateo Ginard

Tomàs. Strategic Planning Director Balearic Islands Port Authority; Mr. Pedro Matutes Barceló. President HOTEL BUSINESS FEDERATION OF IBIZA AND FORMENTERA (FEHIF); Mr. Álvaro Middelman Blome. General Director Air Berlin for Spain and Portugal; Mr. José Moreno Sánchez. Executive Director of Marketing & Sales RÍO HOTELES chain; Mr. Antoni Munar Cardell. Tourism Consultant; Mr. Jaume Puig de la Bellacasa. Director of Communications and Institutional Relations SOL MELIÀ; Mr. Aurelio Vázquez Villa. General Director Spain IBEROSTAR Hotels & Resorts.

2. FROM THE CONCEPT TO THE MEASUREMENT OF TOURISM COMPETITIVENESS

Competitiveness is one of the most commonly cited concepts in economic studies and economic policy design today. However, it is often used without being clearly defined. For this reason we must begin with a basic approach to the concept of competitiveness.

As we understand it, if there exists a field in which the study of competitiveness can be extensively significant, it is the tourism sector in an economy with a high proportion of tourism, as is the case of the Balearics. The tourism sector features a standardised supply in terms of quality and price, and a very precise definition of the competitors in the international market. Therefore this is a privileged case in which the chain of competitiveness in business, the sector and the economy as a whole is clearly realistic.

A second basic requirement that enables the concept of competitiveness to be more than simply rhetoric is that competitiveness can be quantified. If the competitiveness of a company, a sector or an economy can be discussed broadly yet subsequently there is no way of knowing if the competitive position is improving or declining, the principle of the concept is clearly defeated. The evolution of competitiveness needs to be measured, and it is important to understand the factors that influence such changes.

This requirement takes us from the concept of competitiveness to the concept of the Competitive Position Index. This index is a quotient between the value of our supply and the value of our competitors' supply. A natural definition of the value of supply is the quotient between the quality of the supply and its price. This value will need to be compared with the quality and prices of our competitors. This serves as the base for the Competitive Position Index, which displays the evolution of this comparison through time.

Yet going from theory to practice poses a number of important problems. The most difficult of all is the measurement of the quality of our supply. The quantification of this quality is obviously a highly complex task and means using a great deal of information and many conventions. For this reason, the famous Competitive Position Index for prices is used when measuring industrial competitiveness. This index is far easier to calculate, and though it is a simplification of the former, its justification is very convincing, particularly when analysing temporary competitiveness.

The justification of such use is based on the notion that in the short term the quality of the supply is relatively stable, whereas there may be changes in the prices (due to inflation problems or exchange rates) that might considerably affect competitiveness in the short term.

In a stable quality supply situation, if our prices dip below those of our competitors, our competitive position improves. On the other hand, if our prices go up, becoming higher than those of our competitors, our competitive position is weakened. An effect of the sole use of the prices is that the value of the index moves in the opposite direction of competitiveness. In other words, when value increases, competitiveness decreases, and vice versa.

We must point out that functionally defining the index means considering not only the evolution of the supply prices, but also the variations in the exchange rates that the tourists will find in connection with the supply. Thus, the index must be defined as the product of two components:
Competitive Price Position Index for Tourism = RPI * NEER

Where the RPI is the relative price index for the supplies in the currency of each destination (based on the quotient presented above) and the NEER is the nominal effective exchange rate.

Needless to say, an increase in the price of our currency will mean an increase of the Competitive Price Position Index for Tourism, and therefore a decrease in our competitive position.

The main objective of this study is to temporarily monitor the Competitive Price Position Index for Tourism in the Balearic Islands during the 2000-2005 period.

Even so, the study also significantly touches on the global competitive position, while also taking into account the quality of the supplies. This is done by examining the projection of the competitive position of Balearic tourism's competitors for the 2010 horizon, and analysing the twelve explanatory factors of the competitive position in the tourism sector.

Below is a brief presentation of the calculation of the Competitive Price Position Index, followed by a short presentation of the Delphi process in the approach to the 2010 forecast and an evaluation of the explanatory factors for competitiveness in tourism supply quality.

2.1. The calculation of the Competitive Price Position Index for Tourism: determining the benchmark prices and the weighting system

To calculate the Competitive Price Position Index for Tourism the following two questions need to be answered:

* What prices should be considered?
* Who are our competitors and what should their weight be in the price basket that we regard as "competitor prices"?

a) Determining the price index in the Competitive Price Position Index for Tourism

As would be expected, the prices must be those that the tourist effectively pays. Therefore, three aspects of these prices should be taken into account, which will need to apply to all the supplies, whether our own or those of our competitors:

1) The prices at the point of origin (outbound), which the tourist usually pays in his/her own country for items such as lodging, transport, and the overall tourism package, or

2) The prices found at the destination (inbound)
3) The exchange rate

A functional approach to the dichotomy of outbound vs. inbound prices is to assume that a country's inflation (the variation of the CPI) appropriately reflects the price variation in both the inbound and outbound countries. It is true that a country with a high rate of inflation will experience an increase in costs in the tourism sector, which will later carry over to its supply in the outbound countries of the tourists.

The second option resides in finding the outbound prices of hotels or even better, of tourism packages. Whilst this option is probably ideal, it is currently difficult, as valid and lengthy price series are needed for each of the relevant destinations in each of the outbound countries.

To our knowledge, today the operative approach is the first of the two described above: to make use of the CPI. The second approach might be a possibility for the future, once a reliable methodology has been defined and can be applied regularly at a limited cost. As reliable as a detailed study may be, if it cannot be upheld through seasonal series (quarterly, for example), it is not useful in an updated and systematic monitoring of competitiveness.

b) Competing destinations and their weighting

The second major question involves identifying the competitors and their true competitive capacity in relation to the Balearic Islands. Logically, the "prices of the competition" will have to be a measurement of the prices of each competing destination, and each of them will have its prices weighted according to its competitive weight. If Turkey has a far greater competitive capacity with the Balearics than Indonesia or Costa Rica, its price variation will need to be weighted in proportion to its importance.

Precisely herein resides the most innovative and interesting aspect of the competitiveness index mentioned in this report. The only competitive price position index for tourism drafted thus far in Spain, and created for Andalusia by the SAETA (System of Analysis and Statistics of Andalusian Tourism) weights competing destinations according to the overall importance of a country based on its tourism-related income, a figure that is reflected in its balance of payments. While logical, this option poses several problems.

There are two primary limitations to the information on the balance of payments. First, the information is delayed, which might distort the current competitive reality. For example, in the calculations for the year 2005, it would be impossible to attain the effect of the tsunami on the competitive capacity of the affected destinations, as the data from the balance of payments were collected before the catastrophe.

A still more important and structural limitation to the data from the balance of payments is the fact that the weight of each competing destination ought to reflect the strength of the competition in relation to the tourism that affects us: holiday tourism, which is the typical tourism supply of the Balearic Islands. Moreover we must bear in mind the strength of these destinations in the outbound markets that are truly important to the Balearics. The fact that Russia and Finland increase their weight in the tourism from the United States does not necessarily generate a proportional increase in the weight of these destinations within the Balearic index basket. On the other hand, the Croatian or Bulgarian supply strength in the German market would indeed be important, and must be considered in the weight of the price of the Croatian or Bulgarian supply.

How can we collect updated data on competitive strength that takes into account the significance of the competing destinations in the outbound markets that are important to the Balearic Islands?

To answer this question we have implemented the Delphi methodology based on a questionnaire that was handed out to Balearic tourism experts.

2.2. The Delphi expert consultation process: identifying competing destinations and weightings, projections for 2010 and explanatory factors

According to our information, there are other international regions that have used expert consultations to calculate competitive positions for tourism, however this was the first time such method was used in Spain. Hence, we must reiterate the work team's gratitude to the experts for their accessibility and willingness to meet the requests of the Economic and Social Council. Indeed their input was particularly valuable, given their professional excellence and the quality of the information that they provided. In fact, their cooperation was not limited to the Delphi session alone. Rather, they collaborated a second time by offering further information through a survey.

As we have mentioned above, the primary goal of the Delphi consultation was to identify the main destinations that compete with Balearic tourism and to define their relative importance, which would be transformed into the weighting of their prices on the Competitive Price Position Index for Tourism. From this perspective, we must point out the fact that in the ratings of each destination in the first Delphi round they were asked for the value in relation to each outbound market. Thus, in the second round, the overall evaluation was derived from a more in-depth examination.

The first noteworthy result of the Delphi consultation was the definition of the ranking of the destinations that compete with the Balearic Islands, which are presented in the section below.

The opportunity to work with a group of experts such as those who took part in this process was so highly valued by the team that drew up the report that there were two extensions to the objectives of the collaboration. One of those extensions resided in requesting a projection to 2010 regarding the competitive position of the competing destinations.

The second extension was proposed based on the experience from the Delphi interview that was held with the experts. The experts' participation was so positive that the Economic and Social Council suggested that the research team extend the consultation, with a questionnaire on the explanatory factors of the competitive position of each competing destination. This consultation was carried out through questionnaire. Three areas of factors relating to competitiveness were listed: price level, quality of the tourism supply and quality of the environment. These are presented in the section below.

3. MAIN RESULTS AND FINAL THOUGHTS[2]

A/ MAIN RESULTS

The twenty-one destinations that compete with the Balearic Islands were identified and arranged in order of importance, and subsequently grouped into five large regional areas: Spain (the Canary Islands, Andalusia, Catalonia and Valencia), the Southern Mediterranean (Turkey, Tunisia, Egypt and Morocco), the Northern Mediterranean (Croatia, Bulgaria, Greece and Italy), the Caribbean and America (the Dominican Republic, Cuba, Puerto Rico, Mexico, Brazil and Costa Rica), Asia and the Pacific (Thailand, Indonesia and Malaysia).

An initial noteworthy result of this study indicates that the tourism sector of the Balearics became less price competitive throughout the 2000-2005 period, by 14.3%. Yet we must also point out that such drop in competitiveness was not significant or continuous until the second quarter of 2002. At such time, the downward trend would continue until the first quarter of 2004. As of this quarter, the sector gained competitiveness until the second quarter of 2005, with the closure of the last available data.

This evolution of competitiveness fits in very well with the analysis of the tourism situation experienced by the Balearics over the past four years, as can be seen in the sections on tourism published in the Reports of the Economic and Social Council between 2001 and 2004, on the economy, employment and society of the Balearic Islands (See website: ces.caib.es).

The evolution of competitiveness can be broken down into a study of its components: relative prices and the effective exchange rate. Thus, the evolution of the competitive price position index for tourism is not only explained by the relative evolution of the relative price index (RPI), which systematically improved throughout the entire period analysed by 13%. Rather, it is also explained by the relative evolution of the nominal effective exchange rate (NEER), which declined by 31%.

As regards the large tourism regions that compete with the Balearics, the only competitive area —apart from Spain— that remained stable was the Northern Mediterranean, thanks to the neutralisation of the exchange rate effect.

The other large tourism areas displayed a similar competitive trend, with an accumulated loss of competitiveness for the whole of the 2000-2005 period, ranging from 30% for America and the Southern Mediterranean to 40% for Asia and the Pacific.

This loss of competitiveness can also be explained by the effect of the exchange rate, as it went down by 41% in Asia and the Pacific, by 65% for America and 84% for the Southern Mediterranean; whereas the relative inflation differential remained stable with Asia and the Pacific, yet improved by 28% for the Southern Mediterranean and by 20% for America.

We must point out that the Southern Mediterranean and Asia-Pacific regions began to feel the negative effect of the exchange rate as of the first quarter of 2001, whereas America would not feel the effects significantly until the third quarter of 2002. The exchange rate

[2] See Annex.

effect improved for the Balearics in all of these major regions as of the fourth quarter of 2004.

With reference to the more qualitative analysis, the twelve explanatory factors used to explain the evolution of the competitive position of the tourism destinations that compete with the Balearics for the 2010 horizon were as follows: Level of prices (accommodation and complementary supply prices); Quality of the tourism supply (spatial quality, meaning low densities); Hotel equipment and facilities; Diversification of the complementary supply; Exotic character (novelty); Cordiality in human relations (social and professional); Quality of the setting (transport infrastructures, sanitary conditions, environmental quality, safety in towns, climate [length of the season]).

It is naturally useful to link the evolution of the competitive position between 2005 and 2010 in accordance with the expert opinions and the different explanatory factors. For the large areas, these competitive dynamics enable the formation of three groups: areas with a patently positive trend, such as the Northern and Southern Mediterranean, areas with a slightly positive trend, such as the Caribbean and America and Asia and the Pacific, and finally, Spain, which competitive position has become stagnant.

The explanatory factors offer a few hints at these trends: the strengths of the Mediterranean destinations reside in the prices, whilst the quality of the supply is the main attraction of non-European destinations. As these quality factors are more structural, they may improve more moderately yet more persistently than the European destinations, which are more centred on price. On the other hand, the Spanish destinations may be affected by a certain degree of stagnancy, a situation that can be viewed as normal in far more consolidated and mature destinations.

The trends mentioned above will lead to the Southern Mediterranean's repositioning from second to first place, above Spain, which would also be matched by the Northern Mediterranean's competitive position. Despite the improvement in the competitive position of the American destinations (particularly Mexico and Brazil), their competitive capacity at a five-year forecast is still far from that of the European destinations.

As mentioned in the introduction, the results of this study not only provide answers to questions, but also enable us to envisage new questions and lines of work for the future, which we hope to see continue.

B/ FINAL THOUGHTS

1) Our first thought is tied to the geographic scope of the selection of destinations that compete with the Balearic Islands, in two senses. The first is the incredible speed of the evolution of international tourism destinations, stimulated by the influx of investments of large transnational tourism groups, in which Balearic capital plays a highly important role. In relation to this consideration, it would be appropriate to reconsider the weightings in the short term, in which a weight should be defined for the Mexican Caribbean area of Quintana Roo. We should also reconsider the growth potential of Jamaica, the Dominican Republic and Cuba, if its international relations were to improve.
2) It would also be appropriate to complete the weighting technique of the different markets by combining the Delphi method used here with objective data taken from the

official reports of international bodies, such as the influx of tourists, stays, and the international income from tourism recorded by the balances of payments of the different areas.

3) In the estimates of the price variable, for future studies, we ought not discard the idea of completing the statistical series of the relative CPI with ad hoc statistics of outbound prices.
4) Future studies should include the problem of seasonality, differentiating the results by season, as the competitive relations among the different markets might change significantly from high season to low season. One such example is the case of the Canary Islands in Spain.
5) It would also be valuable to consider in the future including some indices relating to the evolution of the profitability of tourism establishments, first of all because their differential determines the future allocation of direct international investments in the tourism area. Secondly, the failure to correct drops in differential profitability over time in a given tourism area would in all probability lead to a loss of investments, a decline in the future quality of the supply and a future decline in the competitiveness indices. In other words, profitability indices play an important role as advance indices of levels of competitiveness.
6) The most promising (and ambitious) future line of research is to examine in detail and to clarify the relations among the different dimensions of competitiveness. From our perspective, this means making use of the concept of revealed competitiveness, and carrying out a relational study of the variables with the greatest weight in its explanation. Based on this approach, we could specify how the variation of some explanatory factors may affect the market share (revealed competitiveness), prices and quality (of the supply or setting). For example, this approach could help determine the impact of a given appreciation of the euro in terms of the evolution of competitiveness, as well as pinpointing the opposite variation of another variable (such as that of hotel prices) that could compensate for this negative effect, so as not to weaken the competitive position.
7) From the standpoint of tourism policy, we must not forget to reflect on the link that connects this sort of study with the creation of a sort of control panel, where some of the basic indices might be the on-line indices of competitiveness for the different markets. In designing such panel it would be essential to set up the study to differentiate between exogenous factors (depreciation of the dollar, for example) and endogenous factors (policies for the distribution and improvement of the tourism supply, for example), and within the latter group, to distinguish the factors that correspond more to business performance from those relating to the performance of the overall economic policy. This would help to clarify the assigned scopes of performance and competence for each authority, policy and business, in the endeavour to improve tourism competitiveness.

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ANNEX

Gráfico 1. IPCT de Balears en el mundo

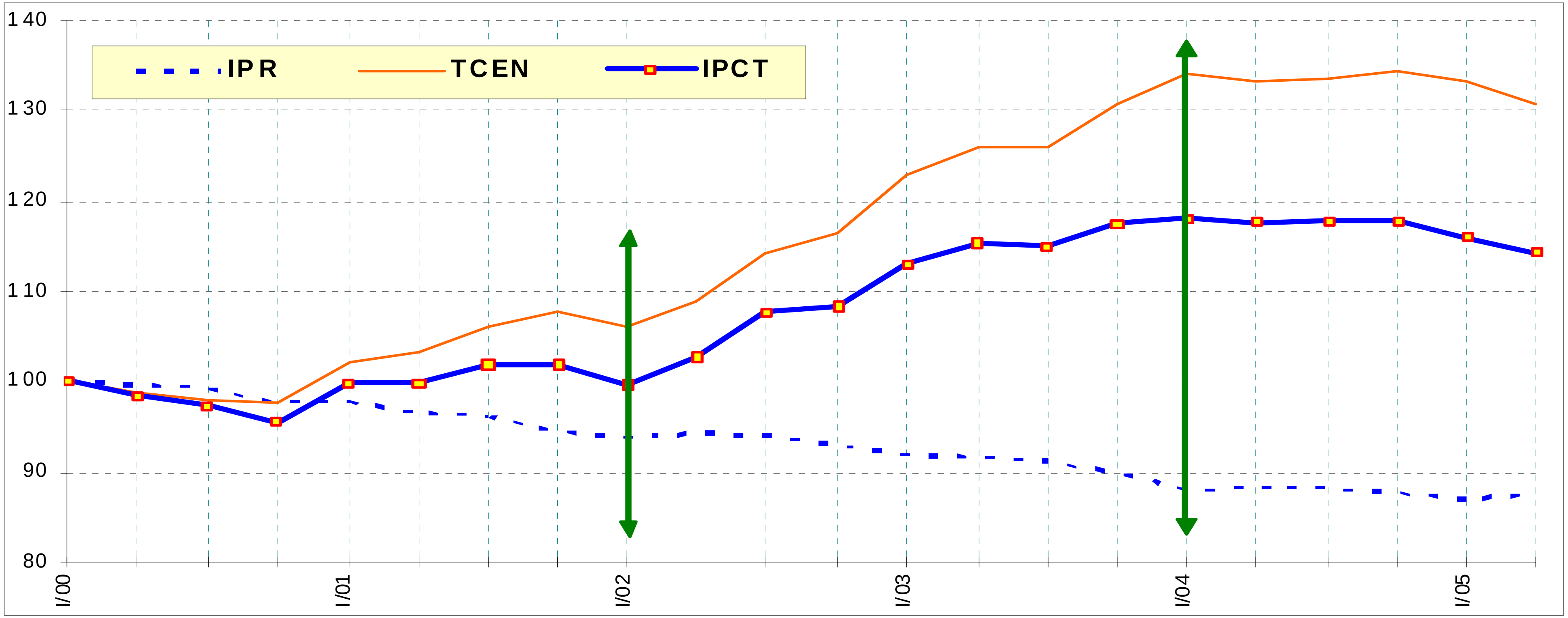

Gráfico 2. El IPCT de Balears por áreas

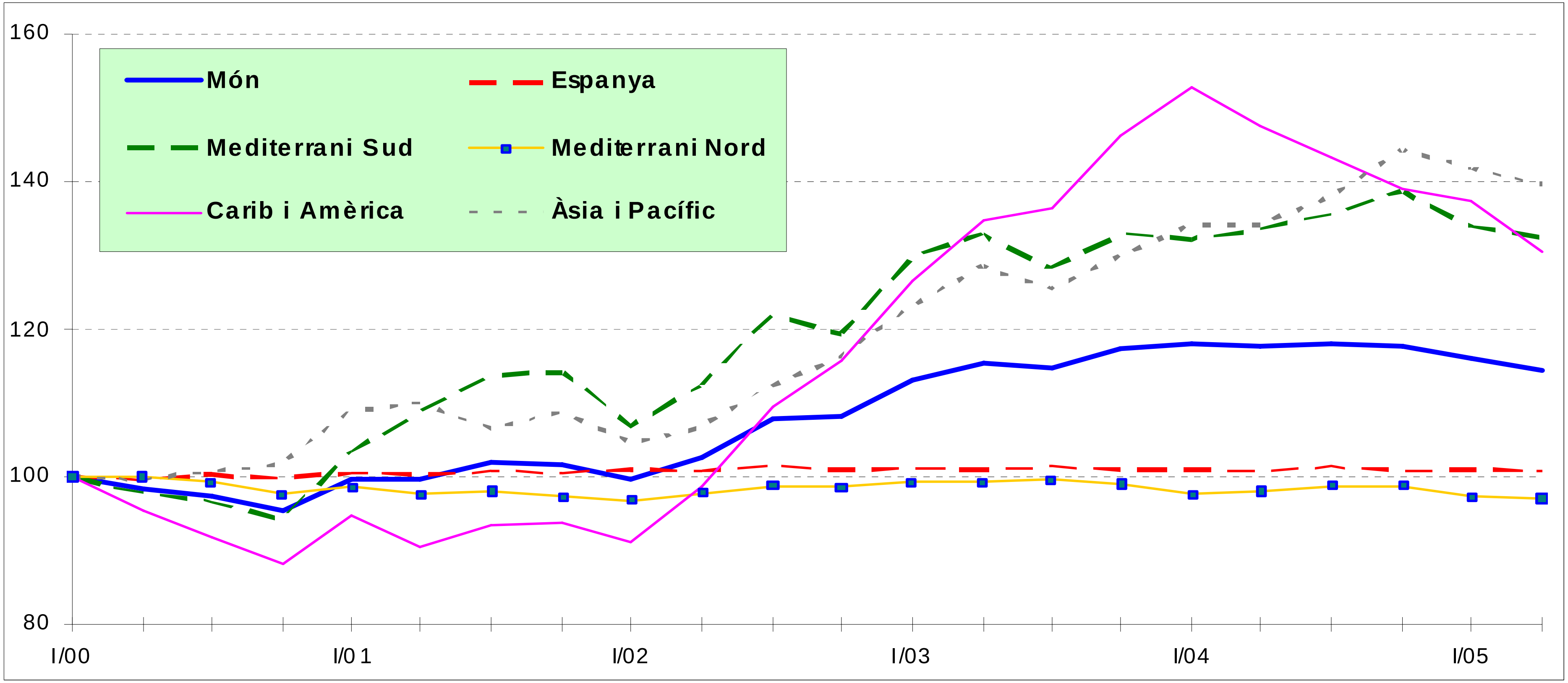

Gráfico 3. Tendencia 2005-2010 de les áreas competidoras

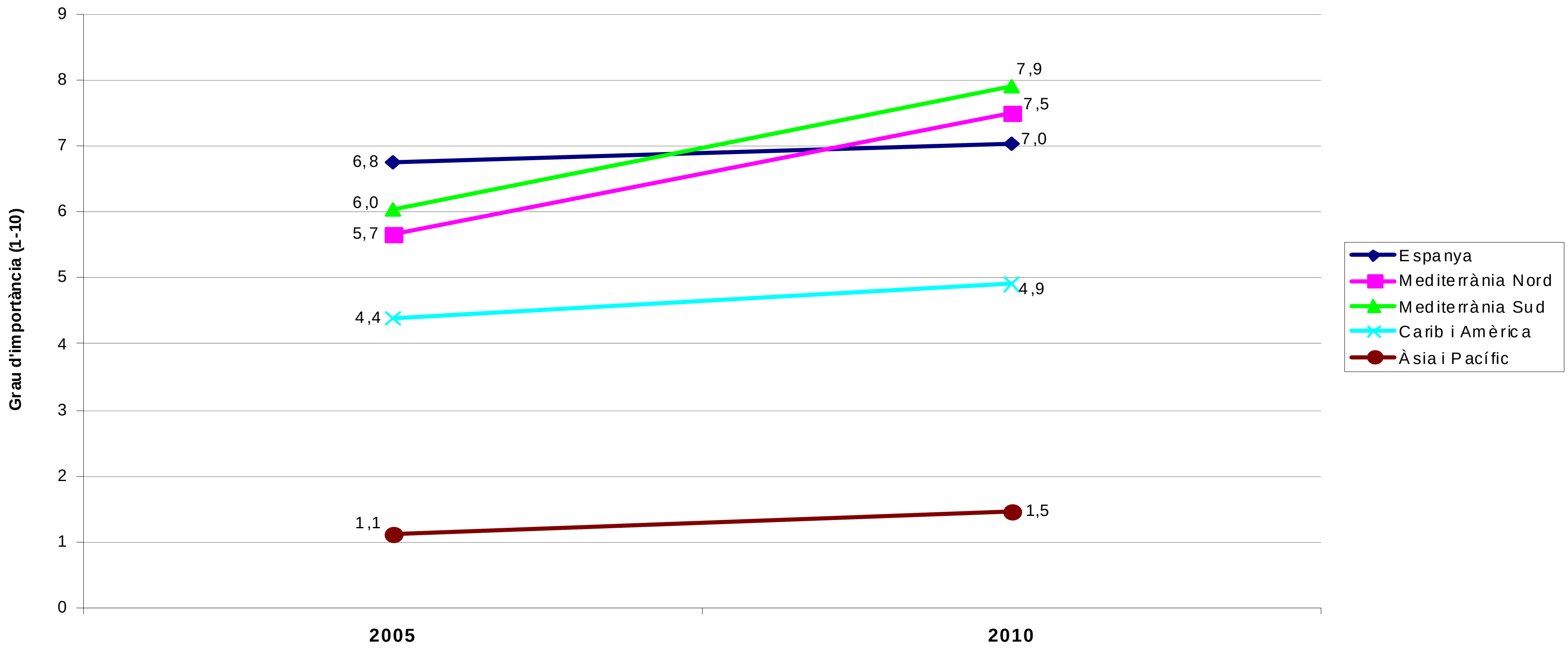

Gráfico 4. Tendencia 2005-2010 del área "*España*"

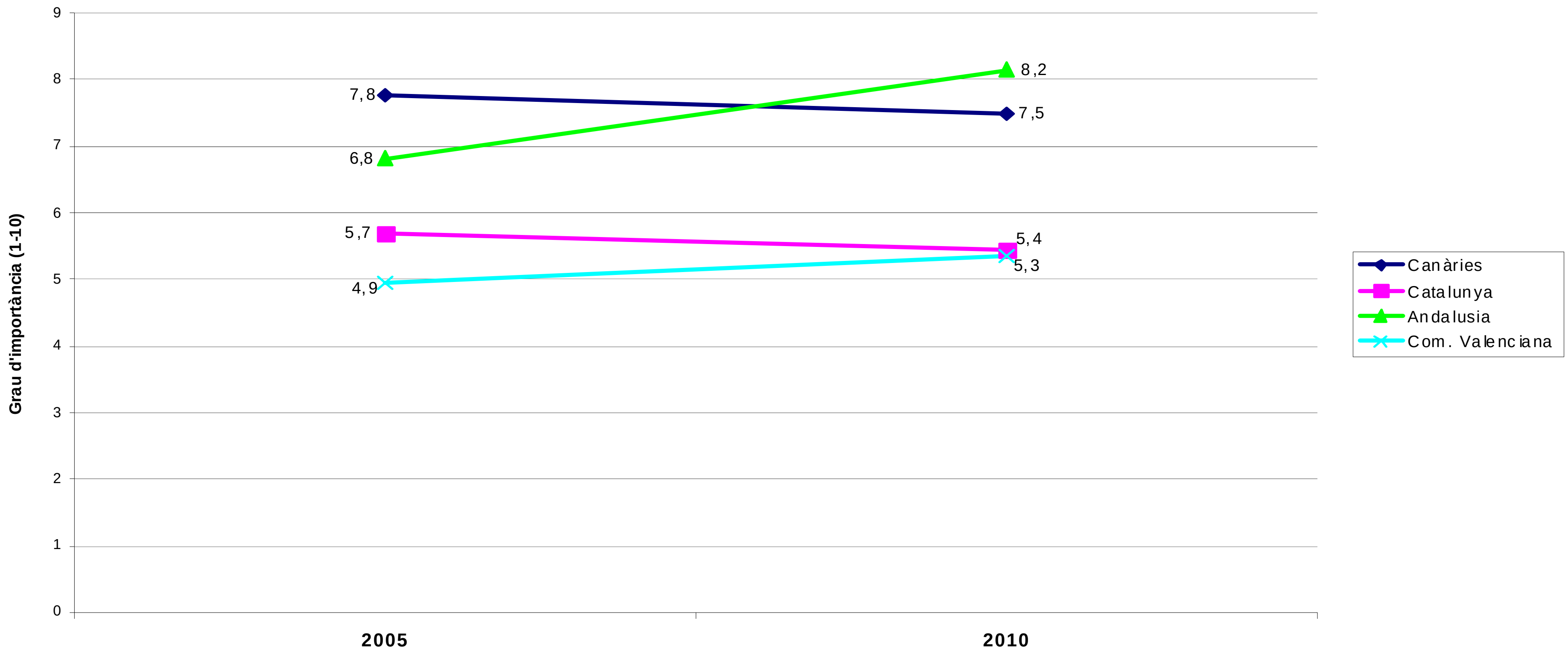

Gráfico 5. Tendencia 2005-2010 del área "*Mediterráneo Sur*"

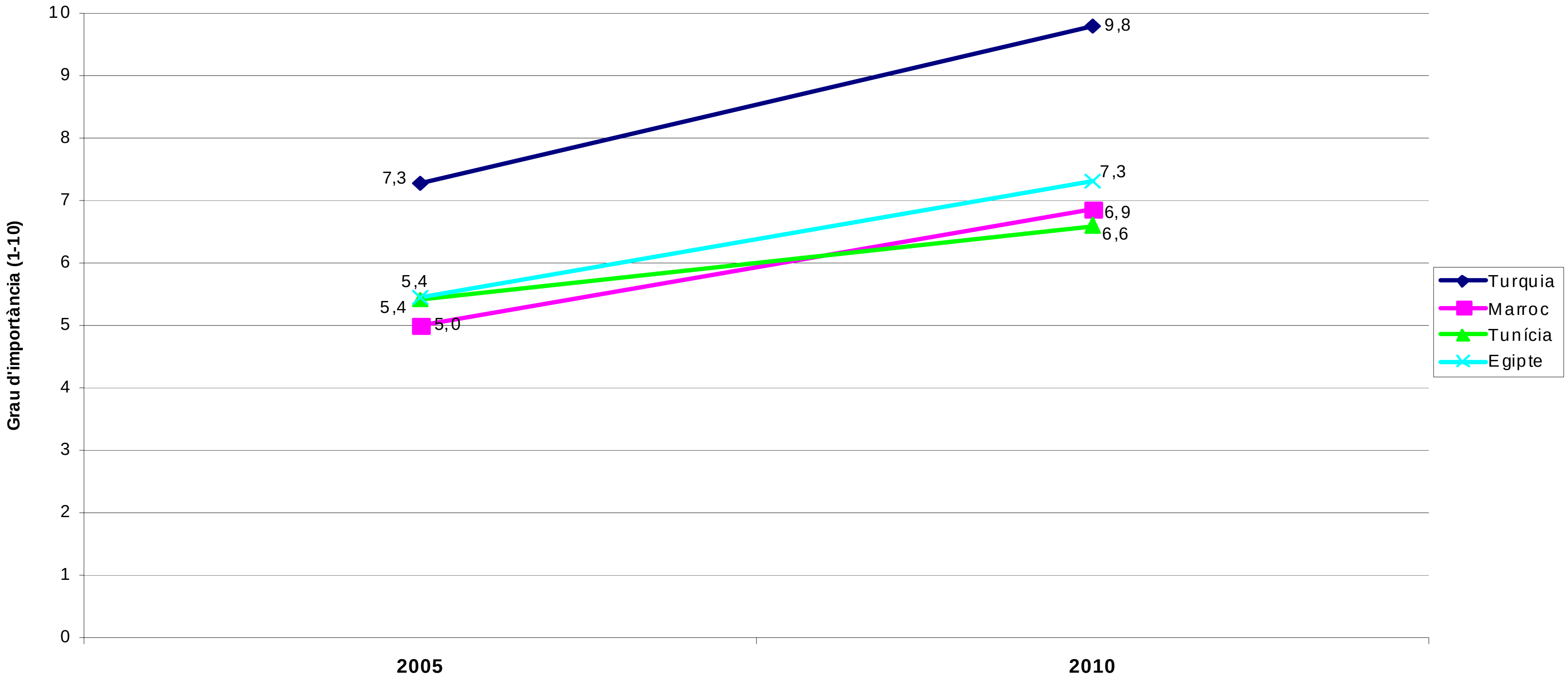

Gráfico 6. Tendencia 2005-2010 del área "*Mediterráneo Norte*"

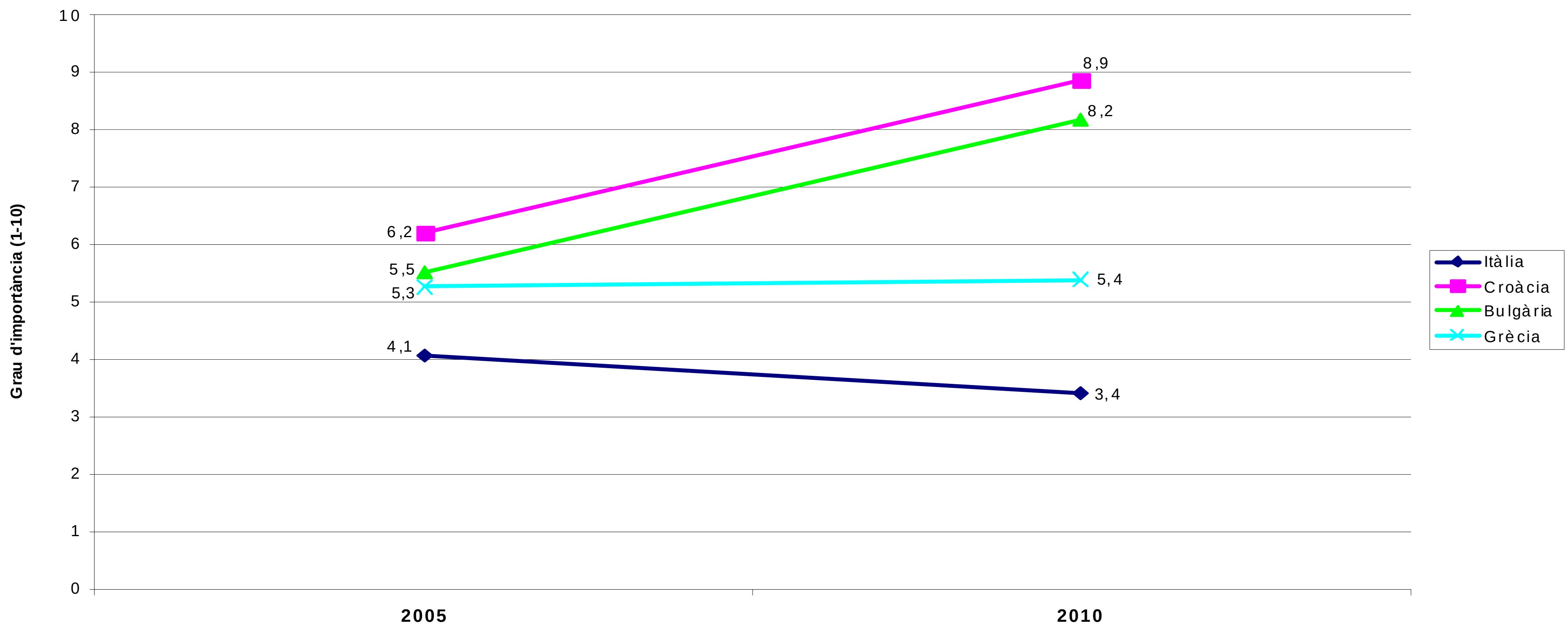

Gráfico 7. Tendencia 2005-2010 del área "*Caribe y América*"

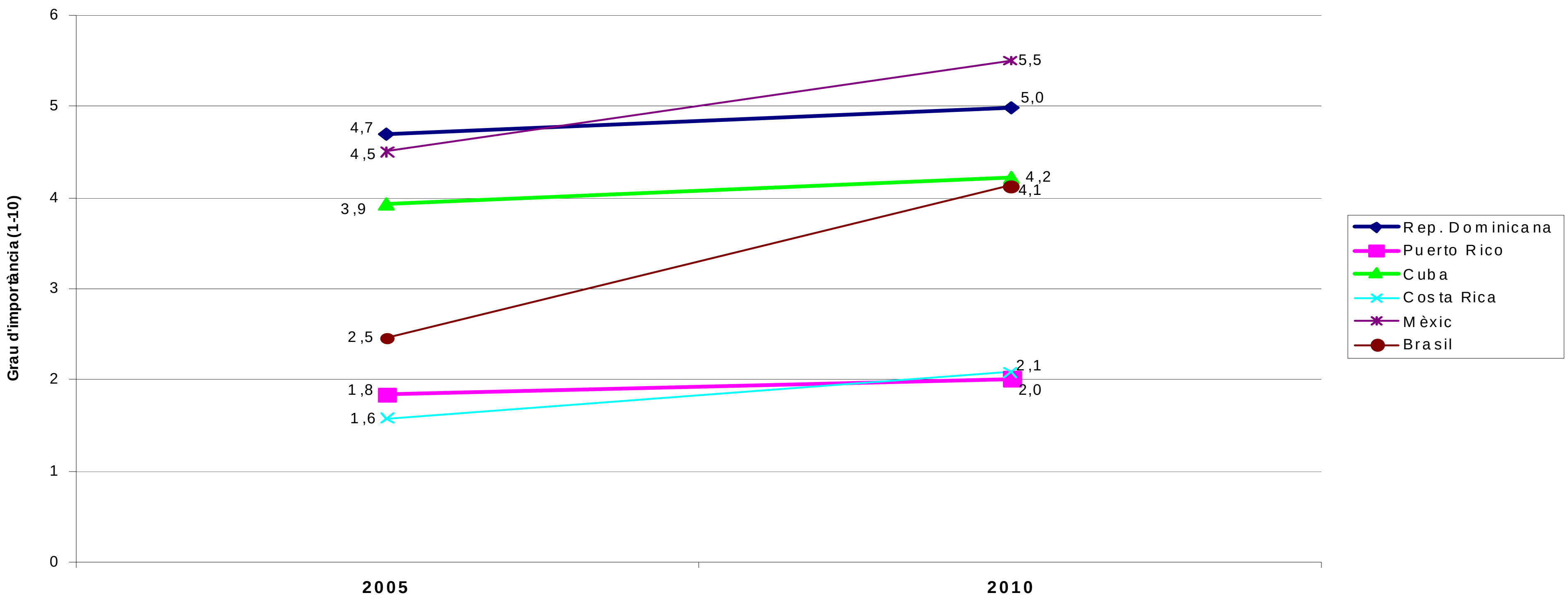

Gráfico 8. Tendencia 2005-2010 del área "*Asia y Pacífico*"