SUSTAINABLE TOURISM OBSERVATORY MÁLAGA
In the south of Spain, bathed by the Mediterranean Sea, Málaga is the second most populous city in Andalusia and the sixth most populous in Spain.

Our more than 3,000 years of history have left us an incomparable legacy. Its monuments, museums, festivals and gastronomy make Málaga a city that cannot be forgotten.

AREA: 395 SQUARE KILOMETRES
POPULATION: 578,000 INHABITANTS
CLIMATE: MORE THAN 300 DAYS OF SUNSHINE A YEAR

1st Airport in Andalusia & 4th in the Iberian peninsula.

- 19,858,656 passengers in 2019
- 5,161,636 passengers in 2020
- 8,874,765 passengers in 2021
- 18,457,194 passengers in 2022
- 137 direct destinations in 38 countries

2nd Cruise ship port in peninsula & 6th in the Mediterranean Sea.

- 288 Cruise Port with 477,001 passengers in 2019
- 41 Cruise Port with 40,172 passengers in 2020
- 144 Cruise Port with 145,859 passengers in 2021
- 267 Cruise Port with 342,045 passengers in 2022
- Seatrade Med in 2022
- Restaurant / entertainment promenade connecting port to city. Málaga Cruise Shops

High-speed trains, commuter railway and metro system.

- Madrid in 2 hour and 20 minutes
- Barcelona in 4 hours and 40 minutes
- 2 metro lines
STO MALAGA

EUROPEAN CAPITAL OF SMART TOURISM 2020

Promote by the European Comission:
Focus on four main pillars:
Sustainability, accessibility, digitalisation as well as cultural heritage and creativity.

MEMBER OF THE SMART DESTINATION NETWORK (DTI)

Promote by the Spanish Ministry of Tourism:
Focus on the five main pillars:
Governance, Innovation, Technology, Sustainability and Accessibility.

SPECIALISED EXPO 2027 CANDIDATE

MÁLAGA’S TOURISM DEVELOPMENT PLAN 2021-2024

The City defined a total of thirteen action areas (‘Strategic Challenges’).
Number 2,5 ‘BE AN INSTO MEMBER’

Based on roundtables with stake holders about the following topics:
MICE, Cruise, Education & Languages, Food & Wine, Cultural & City Break, Nature, Golf, Sun and Beach, Audiovisual & Cinematography, Luxury and Shopping and Health & Wellbeing.

Guide by the objectives of the Sustainable Development Goals (SDG’s) integrated in:
- City’s Urban Agenda
- City’s Sustainable Development Strategy 2020-2050

Aligned with the results of the diagnostic made by SEGITTUR
**STRUCTURE**

**Expert Committee:**
Municipal areas related to the strategic areas of the Insto network: Environmental sustainability, innovation and urban digitalization, mobility, accessibility and citizen participation.

**Tourism Forum:**
Local Stakeholder Group: Representatives of airport, Port, Chamber of Commerce, Hotel association, Hoteliers association, Tourist guides, Spanish schools for foreigners, Travel agencies, .....

**Research Partners:**
OMAU: Urban Environment Observatory
UMA: University of Málaga
CIEDES: Centre for Strategic Research and Economic and Social Development of Málaga.

**DATA SID:**
https://datasid.malaga.eu/turismo_malaga/home
CHALLENGES

1. ACCESSIBILITY

Develop tools to monitor implementation of accessibility.

Last Tuesday 18 October we presented the City’s Accessible Tourism Plan.

2. GOVERNANCE

Improve and extend the monitoring of indicators to improve understanding of all impacts of tourism in the destination.

3. LOCAL PARTICIPATION & SATISFACTION

Start monitoring resident satisfaction and increase evidence about environmental impact of tourism.

4. SUSTAINABILITY

Increase evidence about environmental impact of tourism:
- Tourist flows & Densities
- Climate action
- Impacts of cruise ships

MISSION

Through multisector and destination-wide cooperation, regular and holistic monitoring, evaluation and reporting of tourism impacts, the observatory’s mission is to unlock the potential of tourism as catalyst for positive change by bringing all data insights together that are relevant for sustainable and resilient destinations and provide all stakeholders the opportunity to co-create a tourism model that can balance the needs of people, planet, and prosperity.

The Observatory will monitor, evaluate, and communicate on Málaga’s developments and the impacts they have on the destination, its natural environment, and its inhabitants.

It will strive to ensure reliable, holistic information for well informed decision making, point out risks and opportunities, develop ideas, as well as provide recommendations and best practices towards continuous improvement of sustainable tourism and smart destination management. The enabling of awareness, learning and evidence-based decision making for different target groups of Málaga’s society will be its very core.
Economic Benefits
The economic impact of visitors to the city of Malaga during the period between January and December 2022 is calculated through external sources, such as the INE, RTA and SAETA, as well as by internal sources through the survey carried out on hikers and tourists during the mentioned period.

The proposed estimate of the number of visitors has been calculated from the official data of the INE, reflected in its Hotel Occupancy Survey, together with the results of the survey carried out on tourists and excursionists who visited the city and the count carried out during this study period. Once the total number of visitors is known, an extrapolation of the data is carried out to calculate the totality of the direct and indirect economic impact of visitors in the city.

The direct economic impact is calculated through the data obtained from the survey carried out on tourists and hikers. In the case of tourists, two types of data are obtained: the first, based on the expenditure made at the destination multiplied by the average number of days of their stay and the second, based on the general budget of the trip. In the case of excursionists, the expenditure made in the city is used.

In turn, the indirect economic impact is obtained with a consumption multiplier of the Andalusian economy offered by the report The economy of tourism in Andalusia (SAETA) Year 2021.

<table>
<thead>
<tr>
<th>Método</th>
<th>Gasto medio de bolsillo del excursionista</th>
<th>Presupuesto de viaje del turista</th>
<th>Impacto económico directo</th>
<th>Impacto económico indirecto</th>
<th>Impacto económico total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Según gasto medio de bolsillo del excursionista y presupuesto de viaje del turista</td>
<td>154.45€</td>
<td>1.123.97€</td>
<td>3.115.386.685.72€</td>
<td>1.588.847.209.72€</td>
<td>4.704.233.895.43€</td>
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### INDICATORS

<table>
<thead>
<tr>
<th>INDICATORS</th>
<th>DATA SOURCES</th>
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<tbody>
<tr>
<td>Employment</td>
<td>Ciudad de Málaga</td>
</tr>
<tr>
<td>Total tourism employment (by subsector and annual variation)</td>
<td>INE, Ciudad de Málaga</td>
</tr>
<tr>
<td>Relación entre el empleo turístico y el empleo total</td>
<td>INE, Ciudad de Málaga</td>
</tr>
<tr>
<td>Unemployment</td>
<td>INE, Ciudad de Málaga</td>
</tr>
<tr>
<td>Part-time/full-time employment ratio in tourism</td>
<td>Ciudad de Málaga/Área de Turismo</td>
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<tr>
<td>Ratio men/women employed in tourism</td>
<td>Ciudad de Málaga/Área de Turismo</td>
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<tr>
<td>Average tourism salary (by subsector)</td>
<td>Ciudad de Málaga/Área de Turismo</td>
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<tr>
<td>Value of tourism (multiplier effect)</td>
<td>SAETA; Ciudad de Málaga</td>
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<tr>
<td>Average daily spend (EUR)</td>
<td>Ciudad de Málaga/Área de Turismo</td>
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<tr>
<td>Average travel budget of visitors</td>
<td>Ciudad de Málaga/Área de Turismo</td>
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<tr>
<td>Total economic impact (and direct and indirect)</td>
<td>Ciudad de Málaga/Área de Turismo</td>
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<tr>
<td>Hotel Profitability— RevPar &amp; ADR (&amp; annual variation)</td>
<td>INE</td>
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<tr>
<td>Total revenue generated by tourism</td>
<td>Ciudad de Málaga/Área de Turismo</td>
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<tr>
<td>Contribution of tourism to PIB local (%)</td>
<td>Ciudad de Málaga/Área de Turismo</td>
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<tr>
<td>Income from permits, licenses or commercial concessions</td>
<td>CIEDES</td>
</tr>
<tr>
<td>Revenue from tourism taxes</td>
<td>Ciudad de Málaga/Área de Turismo</td>
</tr>
<tr>
<td>Total annual expenditure on tourism</td>
<td>Ciudad de Málaga/Área de Turismo</td>
</tr>
<tr>
<td>Annual expenditures on tourism as % of total tourism revenue</td>
<td>Ciudad de Málaga/Área de Turismo</td>
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Observatorio Turístico
Málaga/
Tourist Observatory Malaga

Plan Estratégico
de Turismo/
Strategic plan of Tourism

Plan Anual 2023/
Annual Plan 2023
Thank you

visita.malaga.eu