



SUSTAINABLE TOURISM OBSERVATORY MÁLAGA



INSTO

World Tourism Organization
International Network
of Sustainable Tourism
Observatories



Ayuntamiento
de Málaga

málaga
the all-round city





Ayuntamiento
de Málaga



málaga
the all-round city



AREA: 395 SQUARE KILOMETRES

POPULATION: 578.000 INHABITANTS

CLIMATE: MORE THAN 300 DAYS OF SUNSHINE A YEAR



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.



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



Ayuntamiento
de Málaga



málaga
the all-round city



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, Edutainment & 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:

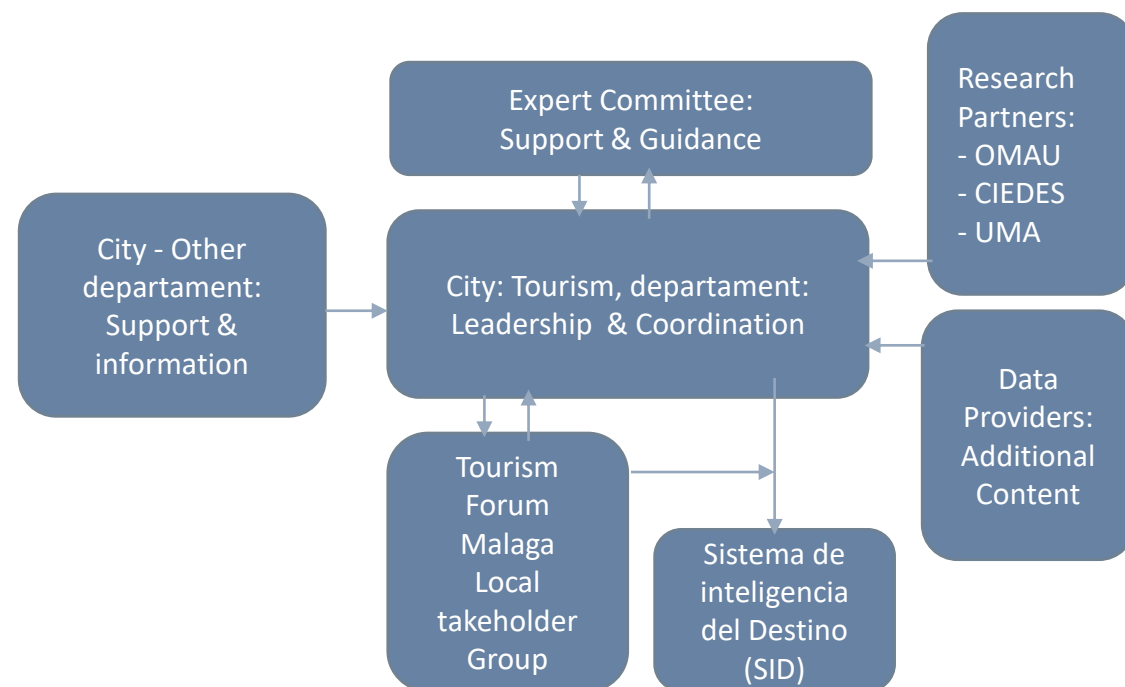
Local Stakeholder Group: Representatives of airport, Port, Chamber of Commerce, Hotel association, Hoteliers association, Tourist guides, Spanish schools for foreigners, Travel agencies,

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

3. LOCAL PARTICIPATION & SATISFACTION

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

2. GOVERNANCE

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

4. SUSTAINABILITY

Increase evidence about environmental impact of tourism

- Tourist flows & Densities
- Climate action
- Impacts of cruise ships

MISION

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.





Ayuntamiento
de Málaga



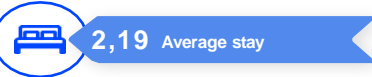
málaga
the all-round city

Economic Benefits

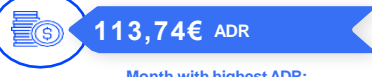


Centre
Pompidou
Málaga

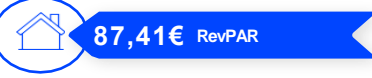
MAIN TOURISM INDICATORS FOR MÁLAGA CITY IN 2022



Month with longest average stay:
August 2,53
Month with shortest average stay:
February 2,06



Month with highest ADR:
August 139,97€
Month with lowest ADR:
January 81,79€



Month with highest RevPAR:
August 23,67€
Month with lowest RevPAR:
January 34,60€



Month with highest occupancy rate:
August 88,35%
Month with lowest occupancy rate:
January 42,30%

Source: INE 2022
* Annual average

RATING OF TOURIST DESTINATION



Recommendation Repeat Satisfaction

Average rating: 8,93

Highlights: Number and variety of museums.

Tourists: Málaga Cathedral, Picasso Museum Málaga, Arab Fortress, Gibralfaro Castle.

Day trippers: Málaga Cathedral, Arab Fortress, Gibralfaro Castle.

Number and variety of events: **8,84**

Beaches and beach services: **8,88**

Source: Tourism Observatory 2022

AVERAGE HOTEL EMPLOYMENT RATE



AVERAGE MONTHLY EMPLOYMENT RATE

Month with highest hotel employment rate: September 2062

Month with lowest hotel employment rate: January 1542

Source: INE 2022

ECONOMIC IMPACT

3.115.386.685,72€

DIRECT ECONOMIC IMPACT

1.588.847.209,72€

INDIRECT ECONOMIC IMPACT

4.704.233.895,43€

TOTAL ECONOMIC IMPACT

AVERAGE OUT-OF-POCKET EXPENSES FOR DAY TRIPPERS 154,45€ AVERAGE
OUT-OF-POCKET EXPENSES FOR TOURISTS 131,92€ TRAVEL BUDGET FOR
TOURISTS 1.123,97€

Source: Tourism Observatory 2022; INE 2022

OUTBOUND MARKETS

SPAIN

Andalusia 257.543 / 44,12%* Region of
Madrid 123.520 / 21,16%* Catalonia
41.262 / 7,07%*
Region of Valencia 24.239 / 4,15%*
Melilla 16.789 / 2,88%*
Castile-La Mancha 14.368 / 2,46%*
Basque Country 14.298 / 2,45%*

INTERNATIONAL

United Kingdom 113.031 / 8,66%*
France 61.012 / 4,67%*
Italy 57.490 / 4,40%* Germany
56.574 / 4,33%* Netherlands
54.284 / 4,16%* United States
43.708 / 3,35%* Belgium 28.390
/ 2,17%*

* Number of tourists and percentage of
domestic and international travellers

HOTELS

175 Number of accommodation facilities
Hotels: 88
Hostels and guesthouses: 87

11.274 Number of hotel beds available
Source: RTA December 2022

TRAVELLERS AND OVERNIGHT STAYS

Total number of hotel guests: **1.305.849**
Domestic travellers: **587.700**
International travellers: **722.149**
Travellers staying in holiday apartments: **212.596**
Domestic travellers staying in holiday apartments: **75.608**
International travellers staying in holiday apartments: **136.988** Country of
origin: **+39**

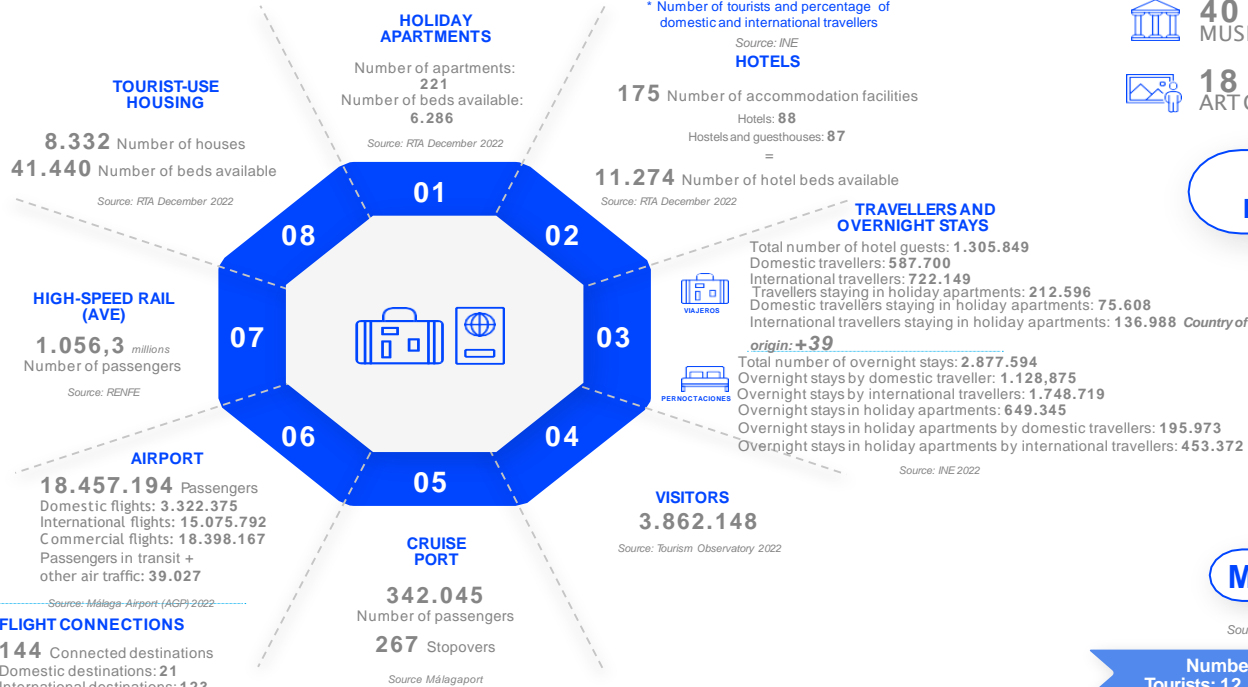
Total number of overnight stays: **2.877.594**
Overnight stays by domestic traveller: **1.128.875**
Overnight stays by international travellers: **1.748.719**
Overnight stays in holiday apartments: **649.345**
Overnight stays in holiday apartments by domestic travellers: **195.973**
Overnight stays in holiday apartments by international travellers: **453.372**

Source: INE 2022

VISITORS

3.862.148

Source: Tourism Observatory 2022



VISITORS SERVED AT THE TOURIST OFFICE NETWORK

693.523

Main countries of origin:

Spain 270.990

France 77.453

United Kingdom 72.946

Germany 34.389

Italy 32.466

Netherlands 25.972

United States 19.681

Source: Tourist Information Office, Department of Tourism

CULTURE AND ENTERTAINMENT

40 MUSEUMS

7 DINING AREAS

18 ART GALLERIES

55 LANDMARKS AND PLACES OF INTEREST

PEDESTRIAN PARTLY-PEDESTRIANISED STREETS

144 Km
Source: Urban Agenda (indicator #30)

ANDALUSIAN TOURISM REGISTRY

Registered companies: **771***
* (without tourist-use housing)

Source: RTA December 2022

MÁLAGA PROVINCE

Source: Annual assessment of tourism 2022 (Costa del Sol)

Number of
Tourists: **12.800.000**

Accommodation
facilities: **61.306**

Number of hotel beds available **509.845**

HOTEL INDICATORS

EMPLOYMENT RATE: **186.870**

Number of hotel guests:
5.661.781
Number of overnight stays:
19.400.000

Total economic impact
17.081.000 €

SPANISH LANGUAGE SCHOOLS



Number of schools: **15+**

Number of students: **18.000***

*International Spanish Learning Centre (CIE) at Málaga University (UMA)

SICTED



Awarded
companies: **243**



METHODOLOGY



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.

Estimación del impacto económico total					
Método	Gasto medio de bolsillo del excursionista	Presupuesto de viaje del turista	Impacto económico directo	Impacto económico indirecto	Impacto económico total
Según gasto medio de bolsillo del excursionista y presupuesto de viaje del turista	154,45€	1.123,97€	3.115.386.685,72€	1.588.847.209,72€	4.704.233.895,43€

SID > INE, SAETA, MÁLAGA COSTA DEL SOL, AENA,
MÁLAGA PORT



INDICATORS

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



DATA

Observatorio Turístico
Málaga/
Tourist Observatory Malaga

MANAGEMENT OF KNOWLEDGE

Plan Estratégico
de Turismo/
Strategic plan of Tourism

ACTIONS

Plan Anual 2023/
Annual Plan 2023



Thank you