

Annual report
2025

Ciudad de Málaga | STO málaga | UN Tourism INSTO International Network of Sustainable Tourism Observatories | UNIVERSIDAD DE MÁLAGA | IATUR INSTITUTO ANDALUZ DE INVESTIGACIÓN E INNOVACIÓN EN TURISMO

Financiado por:

Financiado por la Unión Europea | Plan de Recuperación, Transformación y Resiliencia | GOBIERNO DE ESPAÑA MINISTERIO DE INDUSTRIA Y TURISMO



Acknowledgements

The Department of Tourism and City Promotion would like to thank UN Tourism's International Network of Sustainable Tourism Observatories (INSTO), along with all tourism sector stakeholders, for their support and collaboration throughout the year. Their work has helped build a clearer understanding of what the destination and the Observatory need, and has strengthened the data-driven approach that underpins Málaga's tourism ecosystem. The aim is a new generation of tools that support evidence-based decision-making, improve tourism promotion, expand sustainability training and draw on cutting-edge technology.

Only through close collaboration between public and private partners can Málaga identify the risks and opportunities facing its tourism sector, and strike the right balance between the needs of local residents, the economy and the environment.

Our thanks also go to everyone whose willingness to engage made this year's work possible. It follows an inclusive, resilient model that seeks to reconcile economic growth with environmental protection, heritage conservation and a better quality of life for the people of Málaga — the approach set out throughout this STO Málaga Final Annual Report 2025.

Málaga City Council
Department of Tourism and City Promotion



Table of contents

Pg.5
00. Acknowledgements

Pg. 9
01. Methodology

Pg. 15
02. Introduction

Pg. 19
03. STO Málaga Objectives

Pg. 25
04. Starting Point

Pg. 59
05. STO Indicators, Setting Tourism Trends

Pg. 73
06. STD Málaga

Pg. 79
07. STO Málaga Challenges

Pg. 89
08. STO Málaga Lines of Action

Pg. 101
09. Final Reflections

Pg. 107
10. Annexes

Pg. 113
11. Bibliography



01.

Methodology

Monitoring of indicators

The monitoring and updating of the indicators have been carried out based on data collected from the same sources used in their initial preparation, in order to preserve the methodological coherence, traceability and temporal comparability of the data series.

In those cases where the original sources are no longer available, alternative sources have been identified, analysed and validated. These new sources have been selected based on criteria of reliability, representativeness, historical continuity and methodological compatibility with the data previously used, in order to maintain the consistency of the indicator system.

Interpretation of indicators

The interpretation of each indicator has been structured in two phases: the development of rating ranges and the analysis of its trends.

The calculation of the ranges is based on the historical series available for each indicator. First, the minimum and maximum values are identified, and the range of the series is obtained from the difference between the two. Since five rating ranges are established, this range is divided by four to calculate the distance between the limits of the ranges. The resulting value is rounded for readability and serves as the baseline from which the five tiers are progressively determined. Finally, for those indicators that, by their nature, cannot have negative values (for example, the number of tourists), the lower limit is set at zero or at the minimum observed value.

With regard to the trend analysis, it has been carried out through the study of the annual change and the cumulative year-on-year change of each indicator. The interpretation of the results takes into account the overall evolution of the time series, identifying the predominant trend between the first and last available data, as well as the most significant

variations, fluctuations or specific changes that may have affected its behaviour.

This analysis is developed in greater depth for those indicators considered of greater strategic relevance or impact (Big numbers). In these cases, in addition to describing the quantitative evolution of the indicator, the analysis is broadened to incorporate the relationship with other indicators, contextual factors, relevant events, or policies and measures implemented that may have influenced its evolution.

Future aspirations

The challenges and aspirations were defined through a participatory process involving a group of tourism experts made up of researchers from IATUR, based at the University of Málaga. To this end, the documentation and the evolution of the indicators were provided beforehand so that participants could carry out an individual analysis. Subsequently, a working session was held to review the results, discuss priorities and propose challenges for STO Málaga to address at destination level. The contributions gathered were compiled into a working document, which was subject to a joint review and validated by the Department of Tourism and City Promotion of Málaga City Council.





02.

Introduction

Málaga's vision is a more sustainable, diversified and higher-quality tourism model, built on improving local quality of life and drawing on the destination's authenticity. The aim is to establish the city as a premium destination for visitors seeking luxury and authentic experiences.

Málaga continues to strive to create more exclusive and sustainable experiences. Since one of the Málaga destination's main objectives is to attract high-spending, luxury tourism, the city is committed to excellence. Promoting the premium segment is therefore one of this city's most important tasks.

Málaga continues to grow in tourism terms and closed 2025 with 1.83 million hotel travellers who made almost 3.75 million overnight stays, according to data from the Spanish National Statistics Institute (INE) Survey on Hotel Occupancy. Over the twelve months of 2025, the city of Málaga recorded the city of Málaga recorded a total of 1,834,637 hotel travellers, who made 3,740,465 overnight stays.

The number of travellers and overnight stays increased by 13.8% and 7.6% respectively compared with the previous year, 2024.

It is worth highlighting the great importance of international tourism in the city of Málaga, given that more than 63.7% (1,176,193) of all hotel travellers belong to the international market. The city also saw strong growth in 2024: overseas visitors rose by 17.4% to 1,176,193, while the domestic market grew by 7.9% to 657,908.

In terms of overnight stays, the international and domestic markets grew by 7.8% and 7%, reaching 2,582,698 and 1,153,013 nights respectively in hotel establishments.

The average occupancy rate in 2025 stood at 80.96%, a figure very similar to that of 2024. The average stay was virtually unchanged at 2.05 days, down from 2.16 in 2024.

The predominant international markets have been European, specifically the United Kingdom, Germany and Italy, along with the United States.

Growth in the Asian market was led by Japan, where visitors rose 31.9% to 5,553 and overnight stays 19.7% to 9,483. China also maintains positive growth, up 11.4% in travellers (15,117) and 8.7% in overnight stays (23,850). South Korea, in turn, remains consolidated with very stable figures in both travellers (4,247) and overnight stays (7,621).

The city of Málaga seeks to attract the Asian and American markets with the aim of attracting the high-purchasing-power traveller, interested in culture, gastronomy and local tradition.

The destination's ambition does not end with attracting premium markets, but extends to achieving excellence in terms of economic, social and environmental sustainability. In 2025 Spain approved Royal Decree 214/2025 of 18 March, which makes the measurement and reporting of greenhouse gas (GHG) emissions mandatory. It creates a carbon footprint register and requires thousands of companies to calculate and reduce their emissions from 2026. Málaga City Council's first step was to deliver carbon footprint training to council staff, with certification awarded on completion.

UN Tourism, the OECD and the European Commission have been working for several years on Measuring Sustainable Tourism (MST) indicators. Several initiatives have followed, and a D3Hub pilot project is currently measuring sustainable tourism indicators in 40 European destinations, including Málaga.

Defining, measuring and interpreting these indicators matters all the more under the Tourism Sustainability Plans (PSTD), and specifically the "Decentralisation of tourism in the city of Málaga" project. The project uses a series of alternative tourist routes to spread visitor flows more evenly across the city and enrich the visitor experience. In doing so, it supports a more diversified and resilient tourism model that draws on urban, natural and cultural areas with strong potential to attract visitors.

Málaga follows the Smart Tourism Destination (STD) model, adapting it to local needs while meeting the 97 requirements and 261 indicators set by SEGITTUR (the Spanish state-owned company for the management of tourism innovation and technology). Its involvement in developing the Smart Destination Platform (PID) as a "flagship destination" gives the city a rare opportunity to set an example: digitalization its tourist offices, launching the destination portal, personalising the visitor experience, coordinating promotional activity, and generating new data against the indicators already established.



These initiatives build on earlier work. Málaga was European Capital of Smart Tourism in 2020; it belongs to the STD Network and holds SEGITTUR's Smart Tourism Destination certification; its Strategic Tourism Plans cover digitalisation; it hosts the Sustainable Tourism Observatory of Málaga (STO Málaga) within UN Tourism's INSTO Network; and it has driven forward both the Accessible Tourism Plan and the PSTD plans mentioned above.



03.

STO Málaga objectives

With the development and promotion of the initiatives and projects currently being carried out, such as the Tourism Sustainability Plans in Destinations (PSTD) — specifically the project of Sustainable Decentralisation of Tourism in the city of Málaga; the Smart Destination Platform (PID); the Data-Driven Destinations Hub (D3HUB); the destination's activities as a member of the INSTO Network and within the framework of the STO Málaga Observatory; and the evidence-based progress achieved as a member of the Smart Tourism Destination (STD) network — and thanks to the efforts of all stakeholders represented in the Tourism Forum, the city of Málaga is achieving a series of objectives previously defined in the current STO Málaga Strategic Plan (PESTO 2025-2029) for the year 2025:

- Improving the quality of existing and potential data.
- Improving the accessibility of data available to all stakeholders.
- Strengthening data-driven decision-making.
- Increasing the commitments of all tourism stakeholders to share data.
- Creating continuous and reliable perspectives on tourism trends and dynamics.
- Increasing knowledge and understanding about tourism development.
- Providing tangible evidence of tourism's value and its impacts.
- Facilitating the prioritisation of development decisions and actions.
- Reducing information gaps and fostering data standards.
- Facilitating benchmarking of progress both internally and against other destinations.
- Increasing cooperation within and between organisations.
- Involving all stakeholders in strategic planning through details on indicators and priorities.
- Fostering collective responsibility within the destination.

Meeting these objectives depends on engaging tourism sector stakeholders. STO Málaga therefore follows UN Tourism's good practice of holding a stakeholder workshop at least once a year.

Since 2023, the Department of Tourism and City Promotion has held an annual workshop on a current and significant topic. The aim is twofold: to help stakeholders better understand the needs of the destination and of the Observatory, and to set out the Observatory's vision, value, approach and methodology. Both support a culture of evidence-based decision-making.




UNDER ARMOUR



04.

Starting point

The Sustainable Tourism Observatory of Málaga (STO Málaga) is committed to ensuring that all strategic decisions are grounded in solid data-based evidence and a deep understanding of tourism's impact on the local environment.

As a space for continuous monitoring and evaluation, and a platform for sharing knowledge and best practice at local, national and international level, STO Málaga keeps sight of the roadmap towards sustainable and responsible tourism. This helps it continue recording the key milestones in the city's strategic tourism management under the framework of sustainable tourism, achieved in collaboration with organisations inside and outside the destination (see Figure 1).

Figure 1. Major milestones in developing strategic management for the city's sustainable tourism, achieved in collaboration with national and international organisations

2019	European Commission Accessibility Award
2020	European Capital of Smart Tourism Membership of the STD Network (Smart Tourist Destinations)
2021	Málaga Strategic Tourism Plan 2021-2024
2022	STO Málaga's accession to the INSTO Network of UN Tourism
2023	Workshop 'Present and Future of Sustainable Destinations' in collaboration with UN Tourism
2024	Workshop "Water Management in Destinations" in collaboration with UN Tourism Call for Grants to develop Málaga's Smart Destination Platform (PID)
2025	Participation in the D3Hub Project that offers sustainable solutions based on data-driven evidence. STO Málaga Stakeholder Workshop - Data management in the tourism sector

Source: Prepared by the Department of Tourism and City Promotion, Málaga City Council.

While addressing the immediate challenges posed by tourism growth — accessibility, governance, tourist flows and density — the city is also working to anticipate future challenges linked to sustainability, climate change and social inclusion. This approach allows Málaga to position itself as a sustainable, resilient and inclusive tourist destination—fully aligned with the principles of environmental, social and economic sustainability.



Accessibility

Under the STD framework, the rollout of the PID driven by SEGITTUR has delivered considerable progress in accessibility.

Cross-cutting universal accessibility on the Smart Destination Platform

The **Smart Destination Platform (PID)** will improve information and services for tourists. The Smart Destination Platform aims to bring existing solutions together into a single management platform and add new modules and tools with extra functionality. This will improve Málaga's sustainability and resilience as a destination through digitalisation. As a result, the project has incorporated developments such as the destination recommendation engine and universal accessibility, among others.

The **Smart Destination Platform** is developing the Málaga Destination Portal. This will serve as a full access point to information, tools and resources for residents and tourists alike, and it will connect to other modules such as **#8 Destination Recommendation Engine, #20 Claims, Complaints and Suggestions Manager, #39 Measurement of Environmental Parameters and #50 Universal Accessibility**, among others. Accessibility is a fundamental, cross-cutting issue reflected throughout the Destination website, its Portal and the mobile application.

As part of the Smart Destination Platform's development, Málaga City Council published **tender 125/25, "Development, Implementation and Roll-out of the Málaga Smart Destination Platform (PIDM) 2024"**. The tender falls under the 2024 call for the deployment of technological platforms and digital solutions across the STD Network of smart tourism destinations, within the Recovery, Transformation and Resilience Plan. One of the platform's basic functional requirements is that it be accessible and usable. The PID will incorporate the elements needed to ensure that as many users as possible can use the applications and tools made available to them.

Regarding Monitoring and Alerts, the platform will include monitoring tools to detect problems and alert the support team. Alerts will be sent to warn of service failures or degradation, with an accessible panel for tracking service status. This allows swift action to resolve any problems and to address unforeseen accessibility needs. Among other things, the Destination intelligence includes superior analysis and recommendation capabilities: it supports path and relationship analysis, helping to identify hidden patterns, uncover unexpected correlations and generate highly personalised, proactive recommendations for users (tourists and residents) and managers.

In the same **tender, 125/25, universal accessibility is defined as the condition that environments, processes, goods, products and services — along with objects, instruments, tools and devices — must meet in order to be understandable, usable and practicable by everyone, safely, comfortably and as independently and naturally as possible.** Additionally, accessibility in a smart tourist destination is entirely cross-cutting: it cannot be separated from tourism sustainability at the destination.

Tender 125/25, also highlights module S07 – Tourist App, which aims to provide a mobile app as the main channel of interaction between the destination and the visitor, supporting them before, during and after their stay. The app is a key tool in the platform's multi-channel strategy, designed around accessibility, usability, personalisation and sustainability.

Accessibility in Natural Areas

The Department of Operational Services – Beaches, Málaga City Council, offers a service for people with reduced mobility, providing support and accompaniment into the sea. Additionally, under the route planning for the PSTD project "Sustainable Decentralisation of Tourism in the City of Málaga", the equipment installed along each route will improve accessibility, safety and comfort for visitors. It will also give the city features that help enhance the destination's sustainability.

Málaga also renewed the seven Blue Flags awarded to its beaches in 2025 and received a special mention for accessibility and care for people with disabilities. Málaga City Council was a pioneer in acquiring audio beach equipment. These devices make bathing easier, giving users complete independence and a high level of safety. Thanks to this acoustic guidance device, blind and visually impaired people can bathe independently.

As part of the renewal of the beach services contract, Málaga City Council has purchased 1,000 colour-blind-friendly flags for its beaches. This initiative aims to improve accessibility and care for people with disabilities along the Málaga coastline.

Accessible routes within the PSTD

The Sustainable Tourism Destination Plan (PSTD) of Málaga City Council aims to diversify the city's tourism offer by creating new alternative tourism resources. These help decentralise tourism away from the city centre, redirecting visitor flows from the busiest areas towards under-used areas with tourism potential. Each alternative route therefore needs the right facilities to ensure accessibility, comfort and safety for visitors along the way. This is set out in tender 159/25, "Supply and Installation of Tourist Signage under the Málaga Tourist Route Signage Plan", part of Málaga City Council's PSTD (Priority 4, Action 3) and of the Recovery, Transformation and Resilience Plan, funded by the European Union – NextGenerationEU (Component 14, Investment 1.2, C14.I1.2).

The tender specifications for tender 159\2025, "Supply and Installation of Tourist Signage under the Málaga Tourist Route Signage Plan" (Málaga City Council PSTD, Priority 4, Action 3), describe the purpose of the contract on page 3 as follows: the equipment is needed to make the space functional and to bring together a harmonious range of services, so that both the space and the street furniture work properly. This equipment will improve accessibility, safety and comfort for visitors to the routes, and give the city features that help enhance the destination's sustainability.

The "Sustainable Decentralisation of Tourism in the City of Málaga" Project promotes alternative tourism experiences, encouraging visitors to explore other areas with tourism potential. All actions take into account the main transversal strategic priorities: governance, accessibility, sustainability, digitalisation and the conservation of cultural heritage. The transformation of two Municipal Tourist Information Offices into sustainable, smart, and accessible spaces is one of the key actions for improving the accessibility of tourism establishments and resources. The "Study of Needs for the Transformation of Two Municipal Tourist Information Offices into Sustainable, Smart, and Accessible Spaces" falls within the framework of the PSTD. It sets out the solutions for effectively transforming the two tourist offices, in line with the objectives of innovation, sustainability and accessibility. Other planned actions include creating a waiting room within the Tourist Information Office, offering a wide range of services and guaranteeing privacy, comfort and universal accessibility.

Improving urban accessibility

To date, Málaga has equipped 99 playgrounds with adapted elements, including 134 inclusive play features. In addition, there are 3 playgrounds featuring the full range of integration elements.

The City Council has made progress on the development project to improve road safety and pedestrian accessibility along the Los Almendrales passage. The works include widening the pavement on both sides of the street to a minimum of 1.80 metres along most of its length, resurfacing the road, and building a small retaining wall fitted with a longitudinal metal safety barrier to overcome the existing gradient in the street. The City Council has also considered installing double handrails on both sides of all stepped sections to prevent the risk of falling. The works also include replacing the sanitation and water supply networks, and laying ducting on both pavements for the future undergrounding of public lighting. They also cover the stormwater drainage network and horizontal and vertical signage.

Accessibility is no longer considered solely in terms of physical spaces, although ensuring necessary conditions in local transport and critical visitor areas—such as tourist information centres, major attractions,

beaches, and natural spaces—remains crucial. Equally important is accessibility in the activities and events organised by the destination. Technological tools have become fundamental to STD Málaga's communication strategy, making the accessibility of public sector websites and mobile applications a top priority in the strategic management of the destination.

Governance

In line with the STD model, tourism governance is based on tools designed and developed to strengthen strategic planning within the framework of Destination Sustainability.

Málaga continues to consolidate its new model of tourism governance. There are several points regarding this section.

Technical Monitoring Commission for STD Málaga

All areas of the Local Authority are involved in tourism development, and the Technical Monitoring Commission for STD Málaga plays a key role in this. It has acted as a coordinating body between Málaga City Council's departments since 2024.

Coordinated Development of Tourism Products

The Procedure for the Coordinated Development of Tourism Products has been defined. The coordinated development of tourism products in Málaga is a multifaceted process that requires public-private collaboration among all stakeholders, strategic planning, and a long-term vision. This is achieved through in-depth market analysis, the integration of diverse tourism offerings, effective promotion, and a commitment to sustainability.





Touristic quality at destination

The Department of Tourism and City Promotion is committed to enhancing the professionalism of destination stakeholders involved in tourism activity. Training activities are primarily aimed at SICTED participants, but they are also extended to other groups depending on the topic. Two sessions have been scheduled in November for the taxi sector. These have been organised in collaboration with UNITAXI, Málaga's taxi dispatch centre, which has more than 900 vehicles. On other occasions, training activities have also been held with guides, in collaboration with ILUNION, to support tourists with disabilities.

Under SICTED, the methodology sets a number of training hours depending on the company's cycle. This is a mandatory requirement to obtain or renew the Tourism Quality Commitment badge.

For the first four cycles, a Training Plan offers a catalogue of modules on the SICTED online training platform, so that tourism services can complete their required training hours.

For the higher cycles, the destination's SICTED Manager organises the training activities, making it easier for companies in these cycles to meet the 2 hours of training required.

As a SICTED destination, Málaga planned the following training activities in 2025:

- **23/4/2025** Update on Legislation; delivered by the company Algida, S.L.
- **30/4/2025** Revolutionise your business with AI: order, data and better decisions; delivered by the company HRCS.
- **5/5/2025** Update on Legislation; delivered by the company Algida, S.L.
- **14/5/2025** Intelligent Strategy with AI: the key to growing, automating and standing out; delivered by the company HRCS.
- **1/10/2025** Alternative Tourist Routes, enhancement of new tourism resources in the city. Route through Stately Málaga; Route through the Art District (SOHO) and Route through the Historic Neighbourhoods; delivered by Evento.es Grupo.
- **8/10/2025** Alternative Tourist Routes, enhancement of new tourism resources in the city. Wine Press Route and Environment and Nature Route; delivered by Evento.es Grupo.
- **16/10/2025** Alternative Tourist Routes, enhancement of new tourism resources in the city. Fishermen's District Route and Industrial Heritage Route; delivered by Evento.es Grupo.

Scheduled for the taxi sector mentioned above:

- **13/11/2025** Alternative Tourist Routes, enhancement of new tourism resources in the city; delivered by Evento.es Grupo.
- **17/11/2025** Alternative Tourist Routes, enhancement of new tourism resources in the city; delivered by Evento.es Grupo.

The number of training activities organised clearly shows Málaga's commitment to training its business community, going well beyond the SICTED training requirement.

As mentioned above, several "Alternative Routes" training activities took place in 2025 as part of the Sustainable Tourism Destination Plan (PSTD): enhancement of the new tourism resources in the city, under the Tourism Sustainability Plans in Destinations (PSTD), as part of the project "Sustainable Decentralisation of Tourism in the City of Málaga".

Figure 2. SICTED training activities – "Alternative Routes": enhancement of new tourism resources in the city



Source: Department of Tourism and City Promotion, Málaga City Council.

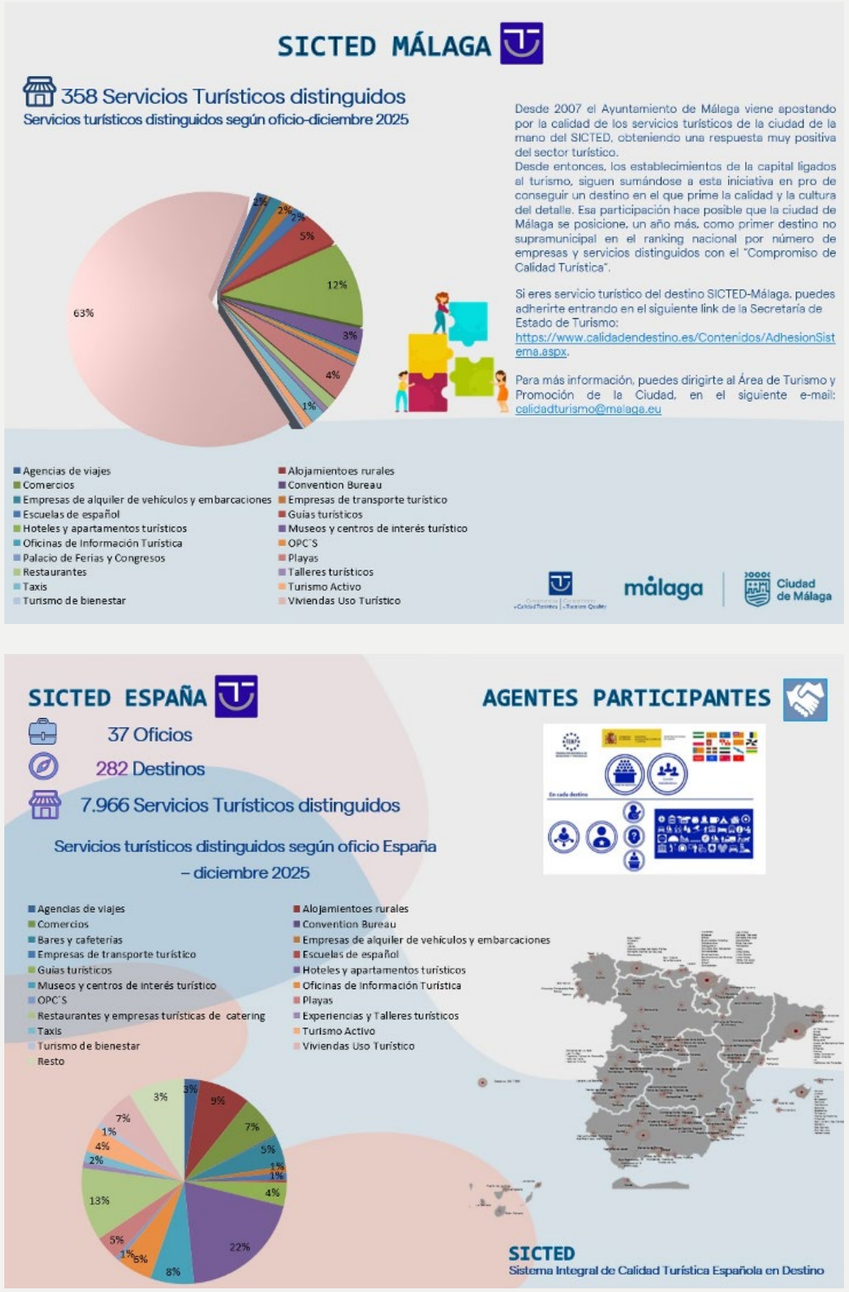
Málaga continues to lead the way in the number of companies and tourism services recognised under the Integrated Spanish Quality System for Tourist Destinations (SICTED). For the fifth consecutive year, it is the city with the highest number of SICTED-recognised tourism services. In total, 358 companies received this distinction in 2025.

Figure 3. The 17th SICTED diploma award ceremony, held in the auditorium of the Málaga municipal services building (Edificio Múltiple de Servicios Municipales), Málaga City Council, 2025



Source: The Department of Tourism and City Promotion, Málaga City Council.

Figure 4. Málaga – Quality Destination



Source: *https://visita.Málaga.eu/profesional/es/sicted*

Periodic process for measuring tourism activity

The destination has a periodic process for measuring tourism activity. Evidence-based decision-making is key to ensuring sustainable and resilient tourism. Achieving this goal requires a continuous assessment of tourism's impact on the destination, including regular measurement of environmental, social and economic indicators.

One of the requirements established by the INSTO Network is that each Observatory must provide annual reports on progress in both mandatory thematic areas and those of specific interest. To enhance understanding of tourism's links with other sectors, its impact on the destination, and to enable efficient, evidence-based decision-making, it is essential to analyse and interpret both quantitative and qualitative data.

In this regard, the main research partner for knowledge management has been the University of Málaga (UMA), through the IATUR team — the Andalusian Institute for Tourism Research and Innovation.

Effective planning and coordination between the Department of Tourism and City Promotion, other Málaga City Council departments, and stakeholders is essential to delivering the best quality services and infrastructure. This calls for coordinated, cross-cutting action between the City Council, other administrations, and destinations nationwide.

Local participation and satisfaction

Informing the destination of residents' and the business community's views on tourism, and the level of tourist satisfaction

The satisfaction of both locals and visitors plays a crucial role in the development of the destination to preserve the quality of life. In the case of Málaga, a city with a growing tourism profile, it is essential to understand how the quality of life of its residents and the experiences of tourists affect each other.

Local satisfaction is one of the 11 mandatory thematic areas studied by the Sustainable Tourism Observatory of Málaga. One of the feedback mechanisms used to understand residents' perceptions and needs is the annual citizen satisfaction survey, managed by the City Council and published on its website. This tool collects opinions from a representative sample of local residents of Málaga, covering key issues such as public services, cleanliness, safety, and cultural and leisure offers. The frequency and transparency of this process reflect the City Council's commitment to adopt measures based on citizens' perspectives, thus ensuring that municipal management is aligned with the expectations and demands of the population.

Destination procedure for communicating tourism activity data and analysis to the sector and citizens

The Sustainable Tourism Observatory (STO) of Málaga: STO Málaga has various communication channels. The main channel for accessing information is the website (https://sto.malaga.eu/), which publishes reports, studies, and key statistics on the impact of tourism on the local environment, as well as strategies for sustainable management.

As one of the requirements set by UN Tourism for observatories, the creation of a dedicated website allows Málaga to build a more comprehensive, coherent, and up-to-date view of tourism at the regional, national, and international levels. Additionally, STO Málaga emphasises collaboration with other observatories through the sharing and exchange of information.

All the resources on the Observatory website are organised into the most important sections of STO Málaga: the STO Málaga Technical Commission, the main indicators, the Observatory activities, the city projects, and the sustainable initiatives currently being carried out. This portal enhances transparency in municipal management and facilitates smoother dialogue between the local government and citizens.

The destination body through which citizens take part in tourism policy in a consultative capacity

The main network of local agents collaborating as key elements in Málaga's development as a Smart Tourist Destination is the Málaga Tourism Forum.

The Málaga Tourism Forum is a consultative body with more than two decades of activity. It continues to bring together various Málaga City Council departments and the tourism sector to defend Málaga's interests as a destination. This forum represents public institutions, business organisations, private agents, and all stakeholders in the tourism sector, with the aim of planning and coordinating actions that positively impact local tourism.

The Málaga Tourism Forum serves as the ideal platform for exchanging ideas and collaboratively analysing the destination's tourism situation. In fact, a series of actions have been developed in this body that have improved the positioning of Málaga as a competitive destination, helping the city's tourism industry to consolidate itself as one of the main sources of employment, wealth, and well-being in the city.

Currently, the Málaga Tourism Forum is made up of Málaga City Council (through the Departments of Tourism, Culture, and Sport); the Airport, the Port, the Málaga Trade Federation (Federación de Comercio de Málaga, FECOMA); Turismo y Planificación Costa del Sol; the Professional Association of Tour Guides (Asociación Profesional de Informadores Turísticos, APIT), the Confederation of Business Owners of Málaga (Confederación de Empresarios de Málaga, CEM); the Chamber of Commerce; the University of Málaga; the Business Association of Hoteliers of the Costa del Sol (Asociación de Empresarios Hoteleros de la Costa del Sol, AEHCOS); the Association of Spanish Language Schools (Asociación de Escuelas de Español); the Historic Centre Association (Asociación del Centro Histórico); the Business Association of Hospitality Professionals of Málaga (Asociación de Empresarios Hosteleros de Málaga, MAHOS), the Business Association of Travel Agents (Asociación Empresarial de Agentes de Viajes, AEDAV); the Car Rental Business Association (Asociación de Empresas de Alquiler de Vehículos); and the Málaga Trade Fair and Congress Centre or FYCMA (Palacio de Ferias y Congresos de Málaga) (see Figure 5).

Figure 5: Members of the Málaga Tourism Forum

Departments of the Málaga City Council: Tourism, Culture, and Sport	Málaga Trade Federation (Federación de Comercio de Málaga, FECOMA).
Port	Airport
Málaga Convention Bureau	Chamber of Commerce
Confederation of Business Owners of Málaga (Confederación de Empresarios de Málaga, CEM)	Business Association of Travel Agents (Asociación Empresarial de Agentes de Viajes, AEDAV)
Association of Spanish Language Schools (Asociación de Escuelas de Español)	Car Rental Business Association (Asociación de Empresas de Alquiler de Vehículos)
Business Association of Hospitality Professionals of Málaga (Asociación de Empresarios Hosteleros de Málaga, MAHOS)	Business Association of Hoteliers of the Costa del Sol (Asociación de Empresarios Hoteleros de la Costa del Sol, AEHCOS)
University of Málaga	Málaga Trade Fair and Congress Centre or FYCMA (Palacio de Ferias y Congresos de Málaga)
Turismo y Planificación Costa del Sol	Professional Association of Tour Guides (Asociación Profesional de Informadores Turísticos, APIT)
Historic Centre Association (Asociación del Centro Histórico)	

Fuente: Elaboración propia del Área de Turismo y Promoción de la Ciudad, Ayuntamiento de Málaga.

Málaga City Council communication channels with residents

In 2025, Málaga City Council, through the Department of Participation, Migration and Development Cooperation, launched the WhatsApp channel "MálagaParticipa" (Málaga Participa - WhatsApp Channel) to improve communication and interaction with the city's network of associations. This is a tool designed primarily to provide associations and entities with all kinds of information related to their activities, such as notices, calls for proposals, procedures, or documents.

The "MálagaParticipa" channel was created not only to meet a practical need, but also to strengthen institutional ties with entities and social groups by promoting participation, collaboration, and equal access to information.

The citizen folder in the Electronic Office promoted by the destination

The My Folder service gives citizens a private, secure environment to view their municipal register details, tax domicile, tax records, taxes, fines, document records, and any complaints or suggestions submitted to Málaga City Council over the last five years. It also lets them carry out procedures and formalities with Málaga City Council.

Promotion of social innovation in tourism

Centro Innosocial Málaga ODS promotes inclusive initiatives in the city. This space drives a network of entrepreneurs and initiatives, connected through networking events, training sessions, workshops, and other activities. It places Málaga and the Innosocial Awards — with a particular focus on young talent — at the centre of the Social Innovation ecosystem.

Málaga City Council's 2025 Málaga Voluntaria (Volunteer Málaga) Awards give well-deserved recognition to individuals, groups, and companies that have stood out during the year for their voluntary, selfless dedication. The awards promote volunteering as a way to highlight citizens' active role in city governance and to foster essential democratic values such as solidarity, tolerance, and social justice.

Surveys carried out on the perception of innovation at the destination

The Update of the Preliminary Market Consultation initiative aims to encourage natural and legal persons to submit innovative solution proposals. These should address the areas of action set out in the call for proposals, using technologies that surpass those currently available on the market. Specifically, the results of the Update of the Preliminary Market Consultation should give Málaga City Council enough insight into the most innovative and effective solutions on the market to launch the Innovation Public Procurement tender in 2025.

Málaga City Council is committed to continuously improving the services it offers. For this reason, it not only has recognised management systems and models of excellence in place, such as ISO 9001, ISO 14001, ISO 45001, UNE 170001, the Q for Tourism Quality standard, Service Charters, and EFQM, but it also actively listens to citizens through various satisfaction assessment tools. These tools provide first-hand insight into the needs and expectations of Málaga residents and visitors to Málaga, enabling data-based decisions to deliver a quality public service.

As part of the PSTD project: Sustainable Decentralisation of Tourism in the City of Málaga, telephone surveys were carried out with a representative sample of key stakeholders to gather specific information on prioritising the functionalities to be developed for the digital platform. These surveys allow for direct interaction, helping to clarify questions and explore responses in greater depth. This offers a comprehensive understanding of the needs and perceptions of the various stakeholders involved in innovation, new technologies and digital transformation.

The Department of Innovation, through one of the strands of the Centesimal project, has launched a use case called "Citizen Satisfaction". Specifically, the initiative uses a web application to manage online surveys — LimeSurvey was selected — and processes the results automatically through defined KPIs via a dashboard. These surveys can be added to any municipal website, or a link can be emailed to known addresses inviting people to take part.

Undoubtedly, citizen participation and the satisfaction of Málaga residents and visitors alike are closely linked to governance. In this respect, collaborative processes at the destination need to keep expanding, with greater involvement of the local community and businesses in strategic tourism planning.

Tourism flows and density management

2025 saw numerous actions and advances under the Sustainable Tourism Destination Plan (PSTD), an initiative that champions the city's authenticity, diversity and everyday life. It offers a broader view of the destination beyond traditional routes, through new routes linked to the neighbourhoods, nature, culture, history, innovation and Málaga's identity.

The Sustainable Tourism Plan for the City of Málaga involves an investment of 3 million euros across around fifteen actions, structured under four programme areas: green and sustainable transition, improved energy efficiency, digital transition, and competitiveness.

These include actions on environmental tourism, urban parks, climate comfort areas, digitising tourist routes, transforming municipal tourism offices into sustainable, smart and accessible spaces, upgrading facilities, and strengthening tourism data management and analysis tools.

The Sustainable Decentralisation of Tourism in the City of Málaga project is funded by European Next Generation funds under the Recovery, Transformation and Resilience Plan, as part of the Tourism Sustainability Plans in Destinations programme run by the Ministry of Industry, Commerce and Tourism. It is also included in the 2022 Andalusian Regional Tourism Sustainability Plan of the Regional Ministry of Tourism, Culture and Sport, Regional Government of Andalusia.

The initiative strengthens Málaga residents' sense of belonging and gives visitors a more genuine, intimate and authentic experience, connected to the life of the city's neighbourhoods, its everyday landscapes and its territorial diversity.



The PSTD project “Sustainable Decentralisation of Tourism in the City of Málaga” was therefore created to align the city’s tourism growth with its own identity. Málaga looks to the future without abandoning its roots, promoting tourism that is responsible and respectful of civic life.

The routes are the highlight of the project, offering different ways to discover Málaga and showcasing the municipality as a whole, its districts and their different identities. These routes take in stately, seafaring Málaga; the creative SOHO district; the fishermen’s districts of Pedregalejo and El Palo; industrial heritage and innovation; nature and viewpoints; the historic districts; and rural, wine-growing Málaga, linked to its wine presses.

With this initiative, Málaga City Council is decentralising the destination and diversifying the tourism offer, helping visitors and residents alike discover a wider, more everyday Málaga that is connected to its wider territory.

This is an unprecedented commitment to authenticity as a driver of more responsible, sustainable tourism. Visitors experience the city intensely, through a wide range of plans that will be rolled out according to the timeframes set by the PSTDs.

Through the Cluster of the European D3HUB project (Data-driven Destinations Hub): Tourism Flows: the destination can identify key indicators that help manage tourist flows in space and time. This addresses the temporal and spatial distribution of tourists while respecting the destination’s needs within the framework of Sustainability.

The Málaga Data-Driven Destination project develops the basic real-time KPIs used to measure flows, as well as specific KPIs proposed to estimate the impact of Málaga’s alternative routes within the PSTDs.





Climate change

Sustainability is a key concept in the STD model. Alongside conserving and enhancing the environment, it promotes the use of renewable energy, energy efficiency, water cycle management, urban cleanliness, waste management, air quality, climate change, energy efficiency, the use of renewables, natural spaces, landscape impact, noise pollution, waste and recycling, and natural resources — among other initiatives directly linked to the destination's physical environment and environmental protection.

Territorial sustainability is complemented by economic and social sustainability, which are key to smart destination management. This means protecting the local economy, promoting zero-kilometre products and local experiential tourism, encouraging responsible purchasing, delivering sustainability training, ensuring fair employment opportunities, and collaborating with sustainability knowledge centres, among others.

Ultimately, the key to successful destination sustainability lies in the proactive engagement of all stakeholders in shaping new STD strategies aligned with Málaga's vision. This approach maximises the value of available resources and develops well-suited proposals for implementing future-ready technological business models.

One of the requirements established by the INSTO Network is that each Observatory must provide annual reports on progress in both mandatory thematic areas and those of specific interest.

To enhance understanding of tourism's links with other sectors, its impact on the destination, and to enable efficient, evidence-based decision-making, it is essential to analyse and interpret the data collected.

Climate change is one of STO Málaga's main areas of study. One key objective is to quantify the environmental impact of tourists at the destination through their carbon footprint, while also driving strategic planning to tackle the effects of climate change in Málaga — establishing low-emission zones, encouraging renewable energy, creating green spaces, and championing the circular economy.

Sustainable vehicles travel around the city of Málaga

The city has had a new bus fleet since 2025. Through the Málaga Transport Company (Empresa Malagueña de Transportes, EMT), Málaga has added 14 new fully electric buses.

These 14 buses will run on lines 34, 37, 38 and 40, among others, taking the city's fleet of electrified buses to 83 vehicles. The EMT currently has 20 fully electric 12-metre buses and 49 electric-hybrid buses, and now adds these 14 additional fully electric buses to that total. The City Council continues to progressively electrify the bus fleet, aiming to provide more sustainable, environmentally friendly public transport. These new vehicles, like those introduced in recent years, combine efficiency with reduced emissions, helping to improve the city's air quality.

Availability of electric car charging points in destination

Málaga currently has 168 electric car charging points, spread across many areas of the city. In addition, as part of the Next Generation Project – Implementation of low-emission zones and the digital and sustainable transformation of urban transport: Under Málaga Saludable II, 30 chargers were purchased for electric bus charging: This covers the purchase and installation costs essential for properly installing the chargers in the EMT depots.

To manage charging times properly, software will be installed to manage the charging station's capacity, visually track charging status, and generate schedules. The installed capacity will be 2,000 kW.

Energy Transition Plan for the tourism sector in the city of Málaga

Within Málaga City Council's Sustainable Tourism Destination Plan (PSTD), Priority 2 includes the following actions: 2.2. Improving the energy efficiency of route lighting through LED technology and 2.3. Plan for the Transition to a Renewable Energy System and Implementation of Renewable Energy Production Systems.

- **Lot 2.-** Concept: Service to study needs and to design and prepare a plan of action for various actions under the project "Sustainable Decentralisation of Tourism in the City of Málaga".

Energy efficiency management system

Málaga City Council does not issue Energy Efficiency Certificates (CEE) directly, but requires them to be obtained and submitted when selling or renting properties. However, Málaga City Council's Department of Environmental Sustainability has drawn up a Building Decarbonisation Plan to cut greenhouse gas emissions from energy use.

The Plan improves the energy efficiency of municipal facilities by diagnosing, refurbishing and modernising their systems, as well as studies municipal energy consumption, organises the data for better use, and proposes a series of measures to progressively implement this decarbonisation. The Plan was approved by resolution on 9 September 2025.

Promotion of local zero-km products

Málaga City Council prioritises the promotion of organic and zero-km products within its municipal sustainability strategy, for example by holding food events and networking sessions that showcase local products.

Training Sessions on Carbon Footprint

Training in Carbon Footprint 2025 to improve municipal technicians' knowledge of carbon footprint calculation and monitoring during the provision of a public service. The course provided tools to facilitate the calculation and monitoring of the carbon footprint during the provision of public services. Specifically, the following topics were covered:

- Legal framework applicable to the carbon footprint
- Carbon footprint: general concepts
- Types of scope used in calculating the carbon footprint, and the calculation methodology
- SACE calculator
- Calculation of indicators, reduction measures, offsetting and recording
- Success stories on the subject in other public administrations

The training also included a Practical Workshop: Calculation of the carbon footprint of a service under the City Council's Annual Public Procurement Plan, and an individual task to complete the course.

Creation of a Technical Committee against Climate Change

The Technical Committee against Climate Change is a permanent body responsible for approving the measures set out in the PMCC, and for monitoring and reporting on results when required. It will meet up to twice a year. Its members must be municipal officials whose duties are directly or indirectly related to the PMCC. This committee will be formally appointed by an official resolution.

Impact of cruise ships

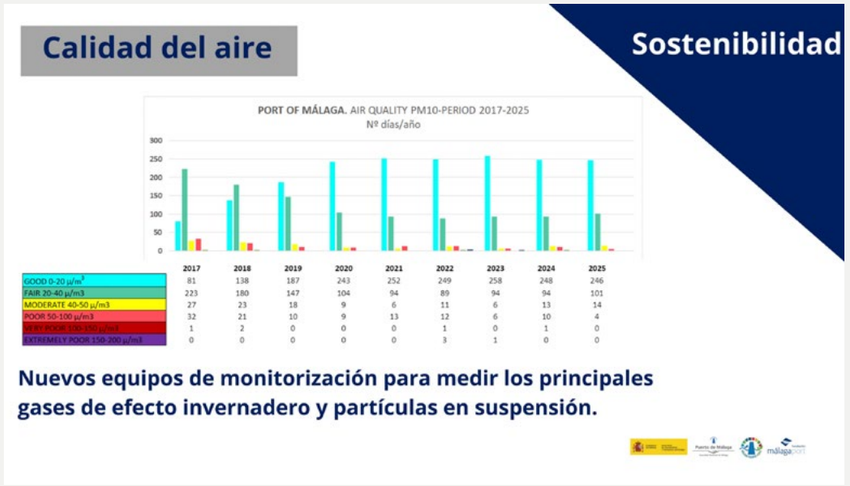
Stronger commitment to Sustainability

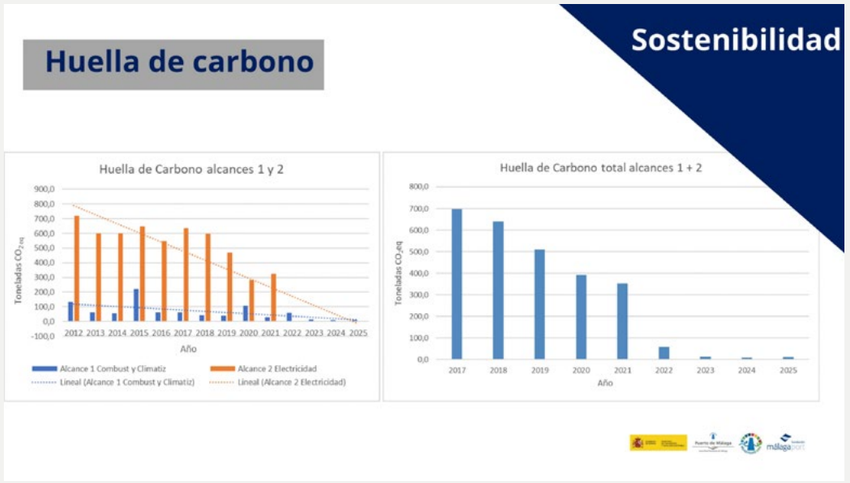
The Port Authority presents the historical data for the close of 2025. The year was marked by growth in freight movement, economic consolidation, a drive for innovation, and a commitment to sustainability.

Cruise traffic closed 2025 with 570,481 passengers (up 21.3%) and 331 calls (up 19%), consolidating the Port of Málaga as one of the leading cruise destinations in the Mediterranean.

The Port of Málaga is strengthening its commitment to sustainability. In 2025, it carried out Spain's first Ship-to-Ship LNG supply operation to a cargo vessel, reinforcing its commitment to cleaner fuels. In addition, new air quality monitoring equipment was put out to tender, to measure key greenhouse gases and suspended particulate matter (see Figure 6).

Figure 6. Air Quality and Carbon Footprint at the Port of Málaga





Source: *https://www.puertoMálaga.com/es/actualidad/el-puerto-de-Málaga-alcanza-un-record-historico-por-segundo-ano-consecutivo-en-el-cierre-del-ejercicio-2025/*





05.

STO indicators, setting tourism trends

In 2025, several indicators show signs of adjustment, stabilisation or correction. This should not necessarily be interpreted as a loss of dynamism, but rather as a logical phase following the strong momentum of previous years.

You can view the STO Málaga indicators table here.

Málaga is strengthening its position within the Spanish tourism system. This is driven particularly by the growing weight of the international market, improved air connectivity, progress in reducing seasonality, and the destination's ability to sustain high levels of demand. This trend suggests the period should be seen as a cycle of expansion moving into a more balanced stage.

In terms of supply and demand, the document shows that Málaga has significantly expanded its tourism capacity. In 2025, the pace changes: total supply falls slightly, and VUTs (tourist-use dwellings) contract for the first time. This adjustment can be seen as a sign of market normalisation, and as an early effect of the regulatory measures.

The international market continues to show great strength and reaches record highs, while domestic tourism loses ground in 2025. This trend is not exclusive to Málaga, but forms part of a broader dynamic observed in other Spanish tourist destinations.

Other indicators support this conclusion. Hotel profitability confirms this change of phase. After several years of rising prices and revenue, 2025 brings a correction in margins. This reduction does not necessarily represent structural deterioration, but rather a stabilisation after the very high levels reached in 2024. From an employment perspective, the rise in Social Security affiliation, the fall in unemployment, and the greater share of permanent contracts point to an underlying improvement in the local labour market. The challenge is no longer simply to create more jobs, but to build stable, skilled employment that fits with residents' quality of life.

Mobility is one of the strongest priorities of the period. Málaga-Costa del Sol Airport continues to strengthen its role as a strategic hub in southern Europe, driven by growth in international passenger numbers and greater route diversification. Internal traffic, the underground and the city bus also show positive growth. This growth in mobility confirms the strength of the destination. However, it also highlights the need to manage flows better, avoid excessive concentration and move towards more efficient, accessible tourism mobility. Connectivity is a competitive advantage, but it also brings greater responsibility for planning.

Key tourism management and planning issues include building profitability with local involvement, and attracting visitors by decentralising tourism — a trend that is increasingly balanced, competitive and socially accepted. These issues shape the trends set out in the STO Málaga indicators below.

Seasonality and the tourism offer

Málaga's tourism offer is going through a phase of consolidation in the 2021-2024 growth cycle. This follows the pandemic, which triggered a widespread increase in demand. The process of reducing seasonality has been the most significant structural phenomenon of the period: the Gini index of visitor arrivals fell from 0.5113 to 0.0874 between 2021 and 2024. The maximum/minimum ratio also fell from 6.66 to 1.28, reflecting an increasingly even distribution of demand across the months. In 2025 alone, the Gini index rebounded by 52.9% to 0.1337, and the ratio rose by 28.13% to 1.64 — a signal to watch closely over the coming years, to see whether it marks a change in trend or is simply an anomalous year.



In parallel, the number of beds grew by 68.3% between 2021 and 2024, from 55,803 to 93,932. This growth was driven mainly by VUTs, which nearly doubled their supply (from 34,888 to 68,789 beds), while hotel establishments expanded more moderately but steadily (from 10,667 to 13,369 beds, up 5.6% in 2025 alone). In 2025 the destination as a whole eased back slightly (-1.4%), driven by the first-ever fall in VUT properties (-5.1%). This shows that the VUT moratorium is working.

This supply dynamic is mirrored in demand: overnight stays have grown since 2022, most notably in holiday apartments (+16.7% in 2025, compared with +7.7% for hotels). Hotel occupancy reached an all-time high in 2024 (>68%), and 2025 shows a mixed pattern, with declines in the low season (January: -10.9%) and record highs in the high season (August: 83.3%). The average hotel price also peaked in 2024 (€166.42 in August) but fell sharply in summer-autumn 2025 (July: -8.1%; August: -9.6%), without losing the gains made since 2022-2023.

According to the INE experimental statistics, the total volume of visitors grew by 91.9% between 2021 and 2024. However, it fell by 3.6% in 2025, driven solely by an 18.2% decline in domestic tourism, while international tourism reached an all-time high of 1,653,005 visitors (up 15.7%). This decrease in domestic demand is also seen in other Spanish coastal destinations in 2025.

Economic benefits at destination level

According to the "Study on the Evolution and Impact of International Tourism in the City of Málaga", carried out by inmark powered by Mastercard (insert link to the report here), Málaga accounts for 16.7% of all international tourism spending recorded in Andalusia — more than Seville, Granada and Cordoba combined (14.3%) — and 20.4% of transactions. The average spend per international tourist reached €189 in 2025. Málaga wins in the low season, since the city no longer has any seasonality: November now grows as much as June in international tourism spending. Catering has become the leading sector of international tourism in Málaga, and leisure and culture have doubled in importance since 2019. International tourism spending in Málaga grew by 8.4% in 2025 and is now almost double the pre-pandemic level.



Hotel profitability (measured by RevPAR and ADR) is beginning to level off, following the sustained upward trend since 2021. Following growth of 20.5% in 2023 and 10% in 2024, 2025 saw a decline of 4.9%. This reverses the historic high of €115.95 recorded the previous year, bringing profitability down to €110.23. This shift matches the hotel price corrections seen in the summer and autumn-winter months of 2025. It points to margins stabilising at a lower level after years of rising prices.

Employement

Tourism's share of municipal employment fluctuated between 2022 and 2025. In recent years, tourism-related hiring fell by 14.9%, from 51,938 to 44,156 contracts. This decline is in line with the wider trend across all the city's economic activities, where registered contracts fell by 20.51%. However, this trend reversed in 2025: tourism-related hiring rose by 2% compared with the previous year, to 45,030 contracts. As a result, tourism accounts for 18.7% of total employment in the municipality.

This recovery comes as the local labour market strengthens. The number of people registered with Social Security rose by 16.5% between 2021 and 2024, and by a further 2.8% in 2025, to 239,040. Meanwhile, unemployment continued to fall throughout the period. It dropped particularly sharply in 2025, down 7.2% to 43,950 people.

In the tourism sector, employment trends are even more favourable. The number of people registered with Social Security in tourism activities grew by 33.6% between 2021 and 2024, confirming tourism's role as one of the main drivers of employment in Málaga. Employment quality has also improved: the share of permanent contracts rose from 46.0% in 2022 to 59.7% in 2025.

Accesibility

Tourism accessibility is now stable and well established. Since 2022, there have been 17 attractions with some level of accessibility, 6 accessible routes and 13 accessible public buildings. Accessible transport now offers more services. Adapted taxi licences rebounded by 17.3% in 2025, to 88, a positive trend after previous years of decline. This progress is matched by an underground and bus network that remains committed to accessibility, both in its facilities and on its websites and apps.

Movilidad

Passenger arrivals at Málaga-Costa del Sol Airport are the destination's most decisive indicator of connectivity. They confirm Málaga's role as a leading air hub in southern Europe, and the most important in the south of the peninsula.

In 2025, the growth trend of recent years continued, with passenger numbers reaching 26,760,549 (+7.4%). This was mainly driven by international passengers, up 7.8% from 20.6 million in 2024 to 22.3 million. One reason for this trend is the greater diversity of international routes, which grew from 221 to 243 between 2022 and 2025. Air traffic is concentrated among five airlines — Ryanair, Vueling, EasyJet, EasyJet Europe and Jet2 — which together carried 15.1 million passengers in 2025, more than half the airport's total volume. This was up 9.8% on the previous year.

Cruise traffic also grew strongly, quadrupling between 2021 and 2024 (+297.23%) and rising by a further 21.39% in 2025, to 570,481 passengers.

In urban mobility, demand for both the underground and the city bus grew. The underground grew by 294.81% between 2021 and 2024, reaching 19.2 million passengers in 2025. The city bus, meanwhile, rose by 65.90% over the same period, to over 53 million passengers a year in 2025.

Governance

Tourism governance rests on a continuous planning process, bringing together different instruments: the Málaga Strategic Tourism Plan, the Sustainable Tourism Destination Plan, and the Smart Tourist Destination (STD) strategy.

Funding for tourism development grew steadily and at a similar pace over the last two years, up 24.8% in 2024 and 25.1% in 2025 to €29.9 million.

Companies with SICTED certification recorded sustained growth between 2021 and 2024, up 67.7% from 167 to 280. The figure stabilised in 2025, rising just 0.7%, consolidating the business community's commitment after the strong initial momentum.

Satisfaction

The housing market increasingly shapes residents' satisfaction and quality of life. Housing prices rose 62.5% over the five-year period, from €2,137/m² to €3,473/m² (+16.6% in 2025 alone). Rental prices rose 62.1%, from €9.5/m² to €15.4/m², while land prices rose 50.1%, from €297.5/m² to €446.5/m² — accelerating to 11.8% in 2025. These trends affect housing affordability. These conditions coexist with sustained population growth: 599,687 inhabitants in 2025, +1.1% year-on-year, with a diverse territorial pattern.

Energy management

Energy consumption in the trade and services sector accelerated significantly in 2025. Consumption grew 7.7% between 2021 and 2024, from 600,864 to 646,990 MWh, then rose a further 21.7% in 2025 to an all-time high of 787,147 MWh. The same trend appears in per capita electricity consumption. Total consumption across the municipality grew moderately between 2021 and 2025, from 3.31 to 3.51 MWh per inhabitant. Consumption in the trade and services sector remained practically stable until 2024, then rose 20.2% in 2025 to 1.31 MWh per inhabitant. These results reflect the growing weight of the tertiary sector in the municipality's energy consumption. They highlight the need to strengthen measures to improve its energy efficiency.

Climate change

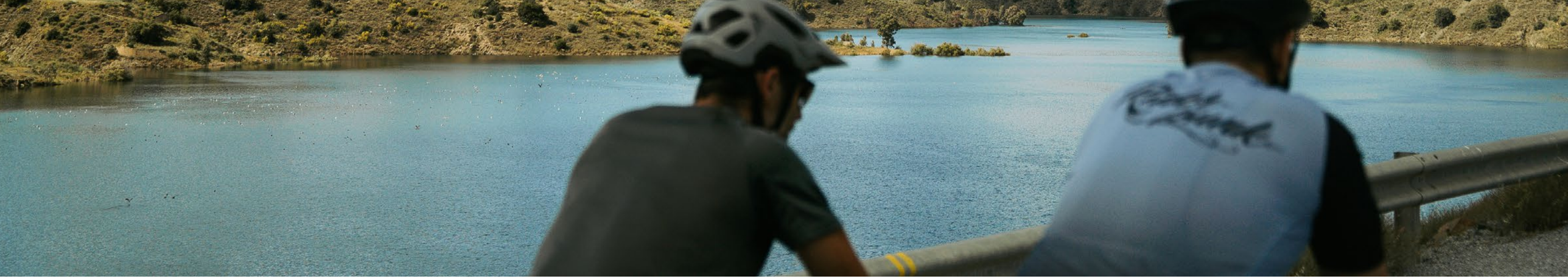
Steady progress continued throughout the period towards meeting the objectives set out in the Alicia Plan.

Furthermore, the number of accommodation places in areas designated as being at risk of coastal or river flooding increased over the period. This increase reflects growth in the accommodation offer in these areas, rather than an expansion of the areas classified as at risk. Thus, places located in high or very high risk areas rose from 4,536 in 2021 to 7,023 in 2024, increasing by a further 6.6% in 2025 to reach 7,488 places. This growth is mainly due to VUTs, which doubled the number of places located in these areas (from 2,440 to 4,885), while hotel establishments showed a much more stable trend (from 1,804 to 2,032 places).

Solid waste

The volume of solid waste collected at events and areas of high tourist footfall continued to grow, rising from 1,782 tonnes in 2023 to 2,301 in 2024 (+29.1%) and to 2,634 tonnes in 2025 (+14.5%). This increase mainly reflects a 29.7% rise in waste collected on beaches over the last year.

This trend contrasts with total municipal waste generated in the destination, which fell 28.48% between 2022 and 2024 and a further 18.95% in 2025, to 367,888 tonnes. This reflects a progressive optimisation of city-scale waste management. The volume specifically attributable to the tourist destination remains stable in per capita terms (0.43 throughout the period). Taken together, these results show that while the city is reducing its overall waste footprint, tourism activity concentrated on beaches and at events is creating growing, highly localised pressure that calls for differentiated management.



Wastewater

Wastewater treatment fell steadily between 2021 and 2024: the volume subjected to secondary treatment dropped continuously from 61.40 to 58.01 cubic hectometres (-5.52% cumulative). This reduction should be read alongside the trend in water consumption and the drought episodes described in the next section. Lower water availability tends to reduce both consumption and, in turn, the volume of wastewater generated and treated in the sanitation system.

Water

Water use, measured through the average per capita daily supply, clearly reflects the impact of the drought experienced between 2023 and 2024: consumption fell 15.43% (from 175 to 148 litres) due to regulatory restrictions, before rebounding 14.19% in 2025 (169 litres) amid greater resource availability. This recovery is even more striking in reservoir stocks. After a 56.47% drop between 2021 and 2024, from 306.57 to 133.44 hm^3, due to severe drought, 2025 saw a structural turnaround of +156.99% to 342.92 hm^3 — already exceeding 2021 levels thanks to a favourable shift in rainfall patterns.

Enviromental education

There has been a surge in environmental awareness programmes aimed at citizens over the last few years. Participation increased by 108.8% between 2021 and 2022, reaching an all-time high of 54,533 attendees across 11 programmes. Since 2023, participation has moderated and the number of programmes has been reduced to 9. Even so, 44,448 people took part in 2024, a figure that still reflects strong citizen engagement in this type of initiative.

Sustainable education

The Sustainable Production Stamp certifies audiovisual productions against environmental criteria. Its trend has been irregular: after a marked decline between 2022 and 2023 (from 9 to just 4 stamps), the indicator held steady in 2024. In 2025 the trend reversed: 7 new stamps were issued, showing renewed momentum for these certification schemes.

Health

The municipality's healthcare capacity has evolved unevenly, depending on the type of resource. The number of hospital beds fell by 11.0% between 2022 and 2024, from 3,030 to 2,698. This trend affects both the public and private networks and reflects changes in the organisation of healthcare. Meanwhile, the pharmacy network remained stable, with 273 establishments between 2023 and 2025. However, population growth has slightly increased the ratio of inhabitants per pharmacy, from 2,132 to 2,197.

On a positive note, the city continues to strengthen facilities for emergency care. Under the Cardioprotected Málaga programme, the number of defibrillators rose by 15.9% between 2023 and 2025, from 640 to 742 devices. Likewise, the number of certified establishments for people with coeliac disease grew from 69 to 75 between 2022 and 2025, continuing a favourable trend.



06.

STD Málaga

Málaga, as a member of the STD (Smart Tourist Destinations) Network, is undergoing full digital transformation, shifting its tourism development model towards one based on knowledge and sustainability. The aim is to drive and sustain competitiveness over time, while boosting resilience and improving both the visitor experience and residents' quality of life.

SEGITTUR defines a Smart Tourist Destination as an innovative, accessible space for everyone, underpinned by advanced technological infrastructure. This model promotes sustainable development of the destination, fosters interaction and integration between visitors and the local environment, and improves both the quality of the visitor experience and the quality of life of residents.

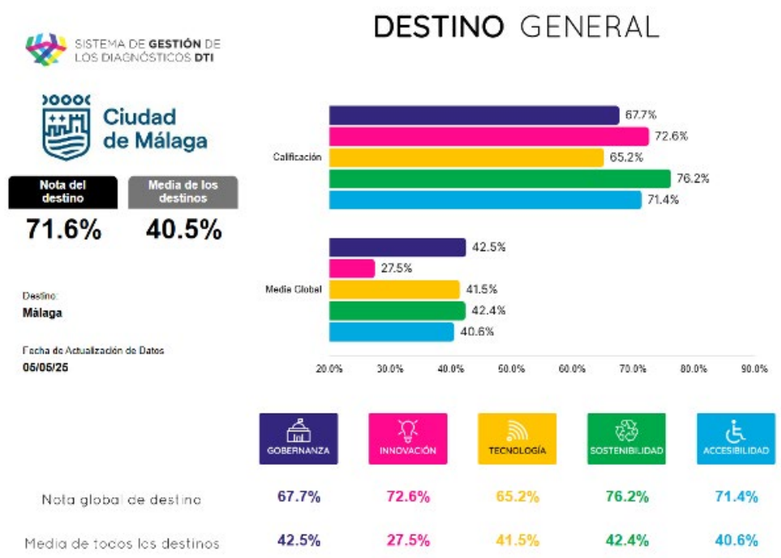
In 2025, Málaga is in cycle 2, Monitoring, where the destination remains engaged in continuous improvement, carrying out SEGITTUR's recommended actions. At each interval set by SEGITTUR, it renews the distinction based on its level of compliance, following an updated diagnosis.
For this renewal of the STD distinction, SEGITTUR's STD Málaga 2024 Diagnostic Report served as the starting point. This report acts as a destination roadmap: based on the assessment of requirements and indicators, it sets out the recommendations needed to renew the STD distinction. These recommendations are then incorporated into a Plan of Action template.

The city's diagnosis is updated at each set interval to reflect progress under the plan of action, ahead of renewing this distinction. To do so, several resources made available by SEGITTUR were taken into account:

- STD Málaga 2024 Diagnostic Report
- Proposed STD Plan of Action for Monitoring
- Smartsheet app with the questionnaires for the STD priorities
- STD Diagnostic Guide to information gathering

As a starting point, we recorded the destination's progress on SEGITTUR's Smartsheet page, with an overall score of 71.6% as of 16.10.2025:

Figure 7. Destination score for the STD and the scores for each priority in the STD model, 2025



Smartsheet app with the questionnaires for the STD priorities, SEGITTUR.

The Málaga Strategic Tourism Plan 2021-2024 has provided a solid foundation for current strategic planning, as well as for monitoring and overseeing tourism activity. It brings together key tools and strategies, developed through careful reflection, to secure the future of tourism, Málaga's key industry, by adopting a management, governance and promotion model driven by the STD Network.

The destination relies on a set of Smart Tourist Destination (STD) management tools that have been strengthened over time, as reflected in the Report: Section on Special Programmes, Tourism Business Development, and Relations with Governing and Collegiate Bodies.

This also highlights the importance of the "Málaga Smart Destination Platform PIDM 2024" project, led by SEGITTUR, which aims to improve tourism management in the city through an integrated, multi-modular system. This destination management platform will centralise the collection, storage, processing and analysis of a new generation of data to support decision-making, and will connect to the PID's Central Node. This platform is a sound and reliable asset for consolidating Málaga's position as a Smart Tourist Destination.





07.

Challenges for STO Málaga

Building on the future challenges established in 2024, STO Málaga focused on maintaining and expanding its work in the identified high-priority areas:

1. How to improve data quality and accesibility

In 2025, STO Málaga moved towards an automated analytical model, using the SF-MST conceptual framework, in line with UN Tourism. In this regard, several Dashboard charts adopted real-time record updates, alongside work on developing the Smart Destination Platform (PID) to centralise the collection, cross-referencing and validation of municipal metrics. In addition, participation in the European D3Hub project helped guide progress towards a system of quality tourism indicators for the city. Finally, knowledge transfer continued through the regular publication of specialised monographs and annual sustainability reports.

2. Developing a governance model for proper monitoring of objetives and indicators

In 2025, the governance structure moved towards more specialised and participatory environments. In terms of management, the Technical Monitoring Commission for STD Málaga held its regular annual meeting to coordinate the STD Plan of Action. With regard to public-private cooperation, besides the Málaga Tourism Forum's monthly meetings, the annual Stakeholder Workshops stand out as an effective tool for promoting sustainability as a central pillar of tourism development. The workshop's activities align with the Sustainable Development Goals (SDGs) and the city's strategy, as set out in the current Málaga Tourism Strategic Plan. The workshop's main aim is to connect all stakeholders by bringing together officials and representatives from both public administration and private companies in the sector. It also helps build a better understanding of the needs of the destination and of the Ob-

servatory itself. The last stakeholder workshop was held in September 2025 and was entitled “Data management in the tourism sector”. The Workshop aimed to collect comprehensive data and promote greater social participation by the public and private sectors, both locally and internationally, in STO Málaga’s good practices.

3. Promoting collective collaboration and local satisfaction

Málaga City Council has systematic assessment tools, such as Omnibus surveys and studies on specific services, which can help identify and respond in future to residents’ main concerns regarding tourism development.

Highlight the role of the Mystery Shopper scheme in tourist information offices, which uses the “mystery customer” technique to objectively assess the quality of service provided. Anonymous individuals interact with citizen and tourist assistance services as an ordinary member of the public would, assessing aspects such as how they are treated, the information provided, and problem resolution. This activity aims to objectively identify strengths and weaknesses in the assistance provided to residents and tourists, and to improve local satisfaction.

4. Balancing social, enviromental, and economic needs

The results observed during 2024 and 2025 showed progress in the different dimensions of tourism sustainability.

In the social sphere, the Department of Environmental Sustainability’s “Málaga ¡cómo te quiero!?” programme prioritised citizen participation and community cohesion. It ran more than 90 awareness-raising actions and organised 30 sustainable events designed to bring together local residents and visitors in caring for the city.

In the environmental dimension, the city rolled out action plans and campaigns throughout the year to optimise waste management, including “Málaga cleans up neighbourhood by neighbourhood” and World Beach Cleanup Day. These initiatives were stepped up during the high season and the Málaga Fair, with special deployments of more than 500 staff working around the clock.

Finally, from an economic and employment perspective, the city boosted sectoral employability through the III Jornada Emplea Turismo Málaga-Costa del Sol (Málaga-Costa del Sol Tourism Employment Conference), which connected more than 1,300 candidates with 80 hospitality and catering companies. The congress and incentives segment (MICE) reached an all-time record, with more than 2,200 meetings and an impact of 280 million euros. This was reinforced by the city’s participation in the European “Cities After Dark” project, which supports a sustainable night-time economy.

5. Promoting regenerate tourism

Con el objetivo de transformar la actividad turística en un motor que recupere el entorno y el bienestar local, Málaga avanzó en la adopción de buenas prácticas globales de turismo regenerativo. En este ámbito, destacó la colaboración con estudiantes de la Inholland University of Applied Sciences para probar soluciones directamente sobre el terreno. Esta visión se respaldó con medidas de gestión orientadas a equilibrar los flujos de visitantes dentro del proyecto PSTD, así como con el lanzamiento del Plan Estratégico Turismo de Málaga 2026-2029, enfocado hacia un modelo de destino inteligente. Finalmente, a través de la planificación del STO para el periodo 2025-2029, el Observatorio analizó registros en tiempo real para optimizar las infraestructuras, las zonas verdes y la movilidad, con el objetivo de aumentar el impacto positivo.

6. Climate crisis and tourism resilience

Málaga strengthened its institutional response to climate challenges in 2025. Its budget rose 3% year-on-year to €25,481,720.93 — the total amount assigned that year to the City Council's Department of Environmental Sustainability and SDGs. This expands the scope of ongoing actions. Notable budget increases include Econecta Gibralfaro (+50%) and Life Watch (+129%), alongside the strategic addition of the new REMED programme. In line with Priority 1 of the Sustainable Tourism Destination Plan (PSTD), the city has stepped up investment in local resilience infrastructure — specifically, creating urban shelters in parks and developing an analytical system to monitor visitors' climate footprint. In terms of water management, drought control measures had been in place since 2023. These restrictions were lifted in 2025 as the typical Mediterranean rainy cycle began.

7. Flows and density

Under the Sustainable Tourism Destination Plan (PSTD), one project stands out: "Sustainable Decentralisation of Tourism in the City of Málaga". It redistributes visitor flows to ease pressure on the historic centre at peak times of year, such as the Málaga Fair, Christmas and Easter. Seven alternative routes divert tourists towards the outskirts and natural surroundings. During 2025, this planning consolidated an ambitious agenda of qualitative actions, giving these corridors identity, narrative and technological support. In the outlying areas, the Pedregalejo and El Palo Fishermen's District Route runs programmes to protect fishing heritage and traditional shipyards. Meanwhile, the Nature and Viewpoints Route and the Málaga Rural and Wine Route, linked to the Lagares wine presses, use digital, interactive self-guided tools to support environmental preservation. These tools are designed to avoid negative impacts on the ecosystems of the Montes de Málaga and to promote respectful, sustainable ecotourism.

At urban level, interventions carried out throughout 2025 aim to transform the districts' appearance while safeguarding neighbourhood identity and boosting the local economy. The Historic Districts Route and the Soho Creative Zone are boosted by the performing arts at the SOHO Theatre — the venue driven by Antonio Banderas — which kept up a vibrant programme. These measures are complemented by cultural storytelling along the Industrial Heritage and Innovation route, and by diversification towards the seafront on the Noble and Port Málaga route.

Finally, this year the routes were operationally integrated into the Málaga Smart Destination Platform, strengthening the model's governance. This allows flow management to be coordinated with data transfer workshops and on-the-ground training programmes.

Regarding demand, Málaga's tourism continued to grow, closing 2025 with 1.83 million hotel guests who made almost 3.75 million overnight stays, according to the INE Survey on Hotel Occupancy. Over the twelve months of 2025, the city of Málaga recorded a total of 1,834,637 hotel travellers, who made 3,740,465 overnight stays. As a result, traveller numbers rose by 13.8% and overnight stays by 7.6% compared with 2024.

In terms of market share, the UK remained the leading international source market, accounting for 15.5% of total visitors. Domestic tourism continued to be led by Andalusia, which accounted for 49.2% of Spanish travellers. The average length of stay, meanwhile, has trended slightly downward since 2021, driven by higher guest turnover in hotels.
The average occupancy rate stood above 65% for all accommodation categories, with peaks in the summer and autumn months.

8. Sustainable transport

In 2025, Málaga began its transition to electric micromobility, launching a three-year plan for a public system of 1,000 electric bicycles and 100 charging stations. At the same time, Málaga completed the phasing-out of horse-drawn carriages in October 2025, prioritising animal welfare and the renewal of the urban image.

In public transport, the Málaga Metro (underground) completed its third photovoltaic phase, installing 3,782 solar panels that provide 3% of the system's annual self-consumption. The EMT, meanwhile, added 14 fully electric buses and 10 additional hybrids compared with 2024, taking more than a third of its operating fleet to full sustainability. This strategy is also backed by municipal subsidies for ECO and ZERO taxis. This transport network absorbed the city's growing external connectivity: Málaga-Costa del Sol Airport closed the year with 26,760,549 passengers (+7.4%), while maritime traffic recorded 345 cruise ships (+21%), with 570,481 cruise passengers (+21.4%).







08.

Lines of action for STO Malaga

STO Málaga's main objective is to make the city a benchmark for sustainable, resilient and inclusive tourism through data-driven governance. Achieving this requires actively engaging citizens, businesses and public bodies to safeguard socio-economic well-being. Deploying the STD strategy and strengthening collaboration among stakeholders requires appropriate tourism planning and management tools. These are set out in the lines of action in the table below, informed by the future challenges stainable Tourism Observatory of Málaga could face.

Therefore, before looking at the lines of action (see Table 1), we need to know the future Challenges facing STO Málaga, which set the timing for the pending actions and initiatives.

1. Accesible and inclusive tourism

Consolidating Málaga as a fully inclusive destination requires going beyond physical adaptations to build a tourism ecosystem free of barriers for every visitor. This challenge covers the improvement and monitoring of accessible public sites and facilities for people with functional diversity. It also includes a qualitative and quantitative assessment of cultural and leisure resources with guides trained to meet visual, physical, auditory and cognitive access needs.

Physical accessibility must be accompanied by digital accessibility. The city will therefore share and promote information to encourage more local businesses and public bodies to improve web accessibility, helping end users — potential and actual visitors, as well as residents — make informed decisions.

2. Improving destionation mobility based on sustainability criteria

This challenge builds on the momentum of previous years towards more sustainable transport. Intermodality and clean energy are the strategic priorities, in line with international guidelines such as the CityDNA network. Recent measures include removing horse-drawn carriages and introducing electric bicycles.

Electrification of public transport is progressing significantly. Both buses and the underground have made progress in this area, and Málaga Metro has been operating on 100% renewable energy since 2022. In 2025, both networks recorded passenger growth: up 4.8% to 53 million and up 5.3% to 19 million. This growth should be used to absorb tourism demand and redistribute flows through initiatives such as city cards.

In private mobility, the city has activated its low-emission zone (ZBE, Zona de Bajas Emisiones), which requires active monitoring. It has also expanded its network of electric vehicle charging points, although these remain scarce in hotel car parks and commercial premises.
Mobility to Málaga hit record highs in 2025 across all modes. Rail passengers exceeded 10 million for the first time, up 12.5%; air travel reached 26.7 million, up 7.4%; and sea arrivals topped 570,000 cruise passengers, up 21%, with the luxury segment accounting for 40% of the total.

This growth is a challenge for infrastructure — the airport, for example, will undergo its biggest transformation in 2028 — and for the city itself, which must be able to accommodate this traffic on its streets.

3. Improving economic prosperity, inclusion and social well-being

This challenge brings together the previous strategies on social balance and citizen satisfaction into an overall vision of local well-being. It broadens participation by all actors in the tourism value chain and by local communities in co-creating sustainable policies. This challenge aligns with the current governance model.

This calls for drawing on the city's associative network, which is highly active and dynamic, and making use of high-potential tools, such as the Citizen Participation Portal, to channel this participation.

The city's challenge is shaped by demand for housing and social perceptions of its causes. To try to alleviate this situation, the City Council applied a moratorium on the issuance of new VUTs licences, which may contribute to a more positive perception. To make consistent progress, the moratorium needs to be extended to other forms of accommodation, such as holiday apartments. At the same time, attracting higher-spending visitors means limiting lower-category hotels and prioritising investment in 5-star and ultra-luxury properties.

The challenge involves adding new indicators to the Observatory's dashboard. These include the demographic variability of the resident population, tourist density (tourists per km²) and tourist intensity (tourists per 100 inhabitants). New variables could be added to broaden the scope of the challenge, such as the affordability of the destination. This could be assessed using wage indicators and living and housing costs, and linked to the realities facing tourism's workforce. The migration balance is analysed in both quantitative and qualitative terms, including migrant profiles. Their academic and professional qualifications are especially relevant here.

4. Promoting economic and labour developtment

This challenge supports Málaga's local development. It measures and monitors, both quantitatively and qualitatively, the financial flows generated by tourism activity, and analyses in detail how these revenues are distributed within local trade, so that benefits are shared equitably among local businesses.

At the socio-employment level, the aim is to look more closely at the quality of employment in the sector, assessing workers' skill levels, job stability and origin to ensure inclusive growth. This challenge analyses the cost of living for residents and tourists and implements measures to preserve local commerce and encourage locally sourced products. Promoting organic and zero-kilometre produce is a priority within Málaga City Council's municipal sustainability strategy. These measures also protect local entrepreneurship, a key driver of the local community.

5. Improving climate resilience and environmental sustainability

This challenge combines environmental balance and climate crisis response strategies. Together, they address the sector's ecological footprint and its adaptation to an increasingly demanding environment. The PSTD's actions on urban shelters, the evolution of the tourist footprint and the growth of renewable energy production systems all help to achieve this challenge.

The priority line will focus on strengthening the destination's resilience to extreme events such as heatwaves, droughts and floods, through emergency plans that give a voice to the public and private sectors and to citizens. Málaga is located in a subtropical area with arid characteristics that demand constant attention to the water balance and rising temperatures.

Faced with these challenges, the destination and its business community are already taking concrete steps: measuring emissions, building a circular economy in hospitality, decarbonising production processes and promoting locally sourced raw materials. Many of these initiatives are driven by Málaga's Sustainable Tourism Destination Plan (PSTD). This improved resilience must be communicated effectively, showcasing progress made and proposing local and global measures that help build a positive, action-oriented narrative on climate change.

6. Redistributing flows

The distribution of tourist flows in cities is a common strategy in many destinations. It requires going beyond traditional management to move towards a decentralised model of visits. This challenge uses the methodological framework of the Sustainable Tourism Destination Plan to monitor the effectiveness of decentralisation policies. Through this monitoring, the aim is to channel demand towards other spaces, with new routes being highlighted. This includes Stately and Port Málaga (La Malagueta), the Art District (SOHO), the Fishermen's Districts (El Palo and Pedregalejo), and itineraries linked to the city's industrial heritage, natural spaces and historic districts.

This geographical diversification aims to relieve pressure on the historic centre and improve the development potential of the periphery. The strategy therefore focuses not only on promoting new leisure spaces, but also on activating each area's intangible and gastronomic heritage. This safeguards its cultural essence and residents' quality of life. Efficiently connecting this expanded ecosystem means encouraging visitors to use intermodal public transport. This becomes a key lever for decongesting the centre and building a cohesive, low-impact destination model.

This challenge is closely related to the challenge of improving prosperity, since the redistribution of flows also involves the decentralisation of tourist accommodation.

7. Increase communication about the effects of tourism in the destination

Tourism brings tangible benefits to local communities, traditionally measured in economic terms such as its contribution to GDP or its capacity to generate employment. These indicators are the most visible, but tourism's impact goes beyond the economic. It fosters open communities, enriches the intercultural fabric and broadens tolerance towards other cultures and ways of life, among other effects.

Although these benefits are widely recognised, tourism is also at the centre of debates on the use of urban space or the distribution of flows. These concerns are valid. Even so, tourism's positive return for citizens must be communicated clearly, especially in a city like Málaga, where tourism plays such a strategic role.

This challenge should build on existing initiatives such as "Málaga ¡cómo te quiero!" to convey the value of tourism in all its dimensions to citizens, and to build a shared narrative between residents, visitors and the tourism sector.

8. Defininf digital governance framework of the destionation (Ethical Data Governance and Digital Reputation of the Destionation)

Trust in the management of information flows is a key differentiator for competitiveness and institutional legitimacy. Building it requires an integrated approach to Málaga's digital reputation and the ethical governance of its data ecosystem. This challenge covers two areas: monitoring and optimising the narratives that shape the destination's image in virtual environments, and rolling out a strict regulatory framework for the Smart Destination Platform. This framework must define protocols for accessing, storing, processing and managing the life cycle of strategic data. It must ensure that the use of this information meets essential standards of transparency, sovereignty and public accountability.

Technological sovereignty and equity in access to information are the foundations that underpin the city's Smart Tourist Destination (STD) model. The strategy therefore focuses on strengthening traceability and security mechanisms. It establishes advanced monitoring processes to ensure that data analytics are developed under a strict code of ethics. This regulatory framework ensures compliance with the GDPR. It also aligns Málaga's tourism intelligence with the EU's values of transparency, democratic governance and public service, projecting a destination that is as technologically advanced as it is trustworthy for citizens and visitors.

Table 1. STO Málaga Lines of Action

Initiatives	Short-term	Medium-term	Long-term
1. Improving the accessibility and inclusion of the destination			
Continuous evaluation and monitoring of cultural and leisure resources	■		
Monitoring of digital accessibility certifications for official channels	■		
Universal accessibility training programme for guides and visitor assistance staff		■	
Deployment of guidance tools and inclusive symbols in public facilities		■	
Plan to expand information outreach and promote the destination more inclusively			■
2. Improving destination mobility based on sustainability criteria			
Evaluation of the legal certainty of the ZBE (Low Emission Zone)	■		
Monitoring of emissions in the ZBE (Low Emission Zone)		■	
Plan for expanding the electric vehicle recharging infrastructure	■		
Design of city cards bundling transport with local tourism products	■		
Design an integrated (transport + experience) and variable fare system that encourages travel to areas with lower tourist footfall		■	
Design a specific management plan that anticipates the changes needed for the airport's future transformation			■
3. Improving economic prosperity, inclusion and social well-being			
Integrating the tourist density and tourist pressure indicators into the Observatory panel	■		
Integrating indicators of demographic variability and the city's migratory balance into the Observatory panel	■		
Building on the previous point, analyse the migratory profiles that Málaga attracts and those that leave Málaga		■	
Monitoring the impact of the moratoriums on VUTs and tourist accommodation on the residential market and tourist-resident coexistence	■		
Defining a composite indicator of residential affordability for the destination, integrating salary metrics, consumer price indices and the cost of primary housing		■	
Encouraging the retention of young talent: design grants, spaces, infrastructure and incentives for qualified tourism entrepreneurs		■	
4. Promoting economic and labour development			
Measuring and monitoring the financial impact of tourism	■		
Actions related to Málaga's cuisine in each area to encourage tourism		■	
Protection and incentive programme for entrepreneurship and local produce		■	
Study and indicators of the cost of living and resident-tourist economic balance		■	
Strategic plan for economic diversification and retention of local talent			■
5. Improving climate resilience and environmental sustainability			
Defining new targets for reducing resource consumption	■		
Communication plan on progress in the destination's decarbonisation, highlighting the PSTD's achievements in particular		■	
Dissemination of emergency plans for extreme weather events among the tourism business sector	■		
Prospective study on the impact of extreme heat on the high tourist season (July-September)		■	
6. Decentralising tourism activity through a flow redistribution strategy			
Tools for monitoring and assessing how effective decentralisation policies are under the PSTD framework	■		
Cataloguing, actions and enhancement of intangible heritage and the identity of the main routes		■	
Plan to promote intermodal mobility and public transport for visitors			■
7. Improving communication on the returns from tourism and its effects on the destination			
Citizen communication programme on the social return of tourism	■		
Regular dissemination reports summarising the Observatory's results in simple, understandable terms		■	
Encouraging meetings between the Málaga Tourism Forum and the city's residents and associations		■	
Integrating a shared narrative strategy on social media to emphasise the social return of tourism	■		
Creating a programme of local tourism ambassadors who highlight good practices of well-managed tourism in their spaces		■	
8. Definition of the destination's digital governance framework			
Monitoring and improving Málaga's digital reputation	■		
Drafting and deployment of the Code of Ethics for the Málaga Smart Destination Platform (PID)		■	
Establishment of governance, life cycle and data security protocols in the Málaga Smart Destination Platform		■	
Establishment of the Technical Committee for Digital Supervision and Transparency of the STD			■
Consolidation of the Open Data ecosystem to advance the STD and the PID			■

Source: Department of Tourism and City Promotion, Málaga City Council.


Centre
Pompidou
Málaga



.09

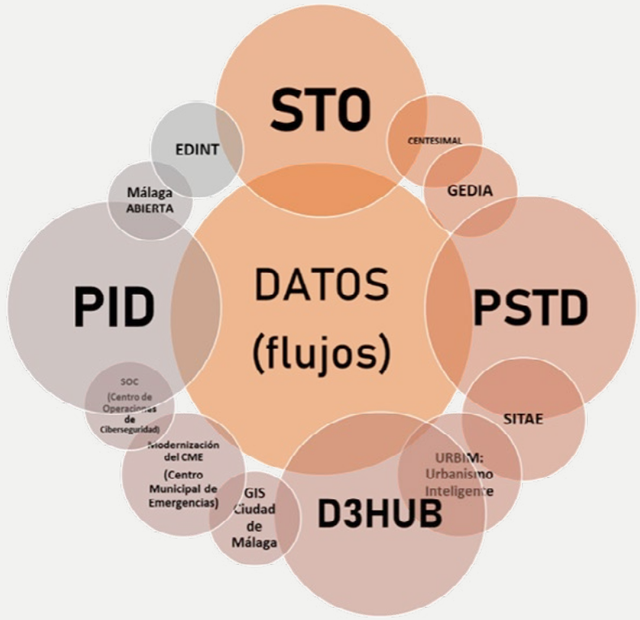
Final reflections

The city continues to strengthen its advanced model of tourism governance, where strategic planning, intensive data use, and cross-sector collaboration come together to build a more competitive and sustainable destination. Governance in Málaga as a Smart Tourism Destination has clearly developed over time. This is evident in the creation of the Málaga STD Technical Monitoring Committee, in close collaboration with research partners such as IATUR and UMA, and in greater involvement from key stakeholders including the Málaga Tourism Forum.

As outlined earlier, and following the STD framework, a substantial number of initiatives and activities were undertaken throughout 2025, based on the strategic management methodology advocated by the State Secretariat for Tourism.

Integrating key projects into the City of Málaga's data-driven approach to sustainability planning and management has been a major milestone to date (see Figure 8).

Figure 8. Málaga Data-Driven Destination Project



Source: Prepared by the Department of Tourism and City Promotion, Málaga City Council.

Taking into account global trends in sustainable tourism and the challenges facing Málaga today and tomorrow, the 2025 Report sets out the management tools of STD Málaga and the actions driving the destination to the forefront of smart tourism.

The Department of Tourism and City Promotion at Málaga City Council is running the projects mentioned above — including STO Málaga, PSTD, PID and D3Hub — which are helping to make the city a smart, resilient, sustainable and inclusive tourist destination through comprehensive digital transformation.



MUCAC

Ciud
de M

I orario de Invierno
De martes a domingo
De 0 :00 a : 0

orario de Verano
De martes a domingo
De 0 :00 a :00 h
:00 a : 0 h

ntrada ratuita

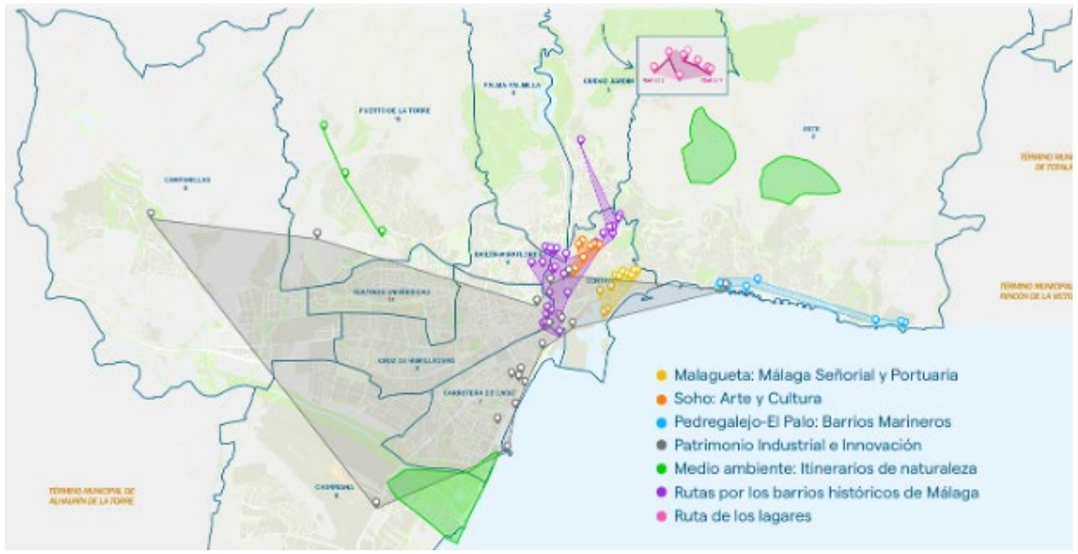
Opening ours Winte
Tuesdays to Sundays
rom .00 am to . 0 pm

TEMPORARILY
CLOSED

CERRADO
TEMPORALMEN

Annexes .10

Alternative Routes



1. Noble and Port District Route: Malagueta



2. Arts District Route: SOHO



3. Fishermen's District Route: Palo-Pedregalejo



4. Industrial Heritage and Innovation Route: TABACALERA



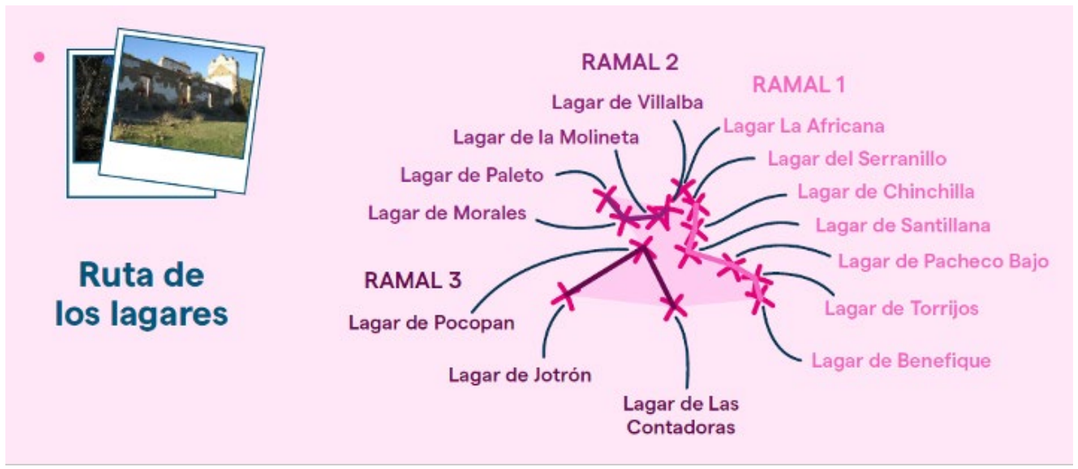
5. Nature Trail Route (Environmental and Viewpoints)



6. Historic Neighbourhoods of Málaga Route



7. Wine Press Route



Source: The Department of Tourism and City Promotion, Málaga City Council.







.11

Bibliography

1. AENA

2. Smartsheet App with the questionnaires for the STD priorities, SEGITTUR

3. Department of Tourism and City Promotion, Málaga City Council, (2025). STO Málaga. https://sto.malaga.eu/

4. Big Data - Turismo y Planificación Costa del Sol

5. Ministry for Sustainability, Environment and Blue Economy. Carbon Footprint of the municipalities of Andalusia

6. D3HUB: Data-Driven Destinations Hub https://www.d3hub-competencecentre.eu/

7. DATAESTUR

8. STD Diagnostic. Guide for information gathering: https://diagnosticos.destinosinteligentes.es/

9. General Directorate of Cadastre

10 The Port of Málaga sets an all-time record for the second consecutive year at the close of the 2025 financial year https://www.puertomalaga.com/es/actualidad/el-puerto-de-malaga-alcanza-un-record-historico-por-segundo-ano-consecutivo-en-el-cierre-del-ejercicio-2025/

11. Statistics, Ministry of Inclusion, Social Security and Migration

12. Study on the evolution and impact of international tourism in the city of Málaga, inmark powered by Mastercard (June, 2026)

13. National Institute of Statistics (INE)

14. Institute of Statistics and Cartography of Andalusia (IECA)



15. Costa del Sol Tourism Observatory Reports

16. Reports of the Autonomous Body for Tax Management of Málaga City Council (GESTRISAM)

17. OMNIBUS Reports provided by the Quality Manager of the Department of Tourism and City Promotion

18. LIMASAM - Non-financial reports

19. EMT Annual Report

20. Málaga Metro Annual Report

21. Annual Report of the Department of Environmental Sustainability of Málaga City Council

22. EMASA Annual Report

23. Ministry of Transport and Sustainable Mobility

24. Spanish Ministry of Finance

25. State Ports

26. Andalusian Tourism Registry

27. Andalusian Environmental Information Network (REDIAM)

28. State Public Employment Service (SEPE)

29. Official Tourism Website of the Regional Government of Andalusia

30.Tur4all website

31. Málaga Film Office website

32. Spaincares website



sto.malaga.eu

Ciudad de Málaga | STO málaga | UN Tourism INSTO International Network of Sustainable Tourism Observatories | UNIVERSIDAD DE MÁLAGA | IATUR INSTITUTO ANDALUZ DE INVESTIGACIÓN E INNOVACIÓN EN TURISMO

Financiado por:

Financiado por la Unión Europea | Plan de Recuperación, Transformación y Resiliencia | GOBIERNO DE ESPAÑA MINISTERIO DE INDUSTRIA Y TURISMO