



Annual Report 2023



Funded:





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Introduction

With a population of 586,770 in 2023 and an area of 395 square kilometres, Malaga is the second most populous city in Andalusia and the sixth most populous in Spain.

The municipality of Malaga, which also gives its name to the province, experienced rapid economic growth in the second half of the 20th century thanks to the tourism industry, which is currently one of the most important pillars of its economy. In 2022, the city received a total of 1.5 million overnight visitors (of which 57% were foreigners), making Malaga the fifth most visited destination in Spain with a total economic impact of 4.7 billion euros and a monthly average of 1,858 hotel jobs generated. The city's top five foreign tourism markets include the UK, France, Italy, Germany and the Netherlands. An infographic is included in the Annex which presents these and other important data related to the city.

With tourism figures increasing rapidly over the past few years, together with the growing challenges from global issues such as climate change, many years ago the city recognised the need for better, more timely and more reliable insights into the rapidly changing dynamics of tourism. Furthermore, the creation of a Sustainable Tourism Observatory (STO) will strengthen Malaga's tourism data capabilities beyond the economic information already available and help monitor the achievement of the thirteen general objectives set out in the city's 2021-2024 tourism strategy.

By putting a strong focus on its digital transformation, Malaga has evolved from a traditional sun-and-beach tourist hotspot to a modern and innovative tourist destination, with the City Council creating a pioneering department specifically dedicated to "Innovation and New Technologies".

The main recent milestones on this path include the city's membership in the Smart Tourism Destination (STD) Network promoted by the Spanish Ministry of Tourism in 2020, as well as its recognition as the European Capital of Smart Tourism from 2020 to September 2021.

However, the real challenge is the sustainability of this activity and of the territory, which is why tourism is fundamental to achieving the Sustainable Development Goals (SDGs). Goals 8, 12 and 14 are respectively related to inclusive and sustainable economic growth, consumption and production, and sustainable use of oceans and marine resources. The contribution of Tourism as a transversal activity, is essential to achieving other SDGs, such as health and well-being ③, gender equality ⑤, reducing inequalities (10), and affordable and non-polluting energy ⑦. Therefore, sustainability is interpreted as a roadmap rather than simply a destination, in which types of sustainability (weak or strong) can be defined, and which requires the measurement and quantification of sustainability to establish public and private policies, understanding that there is no sustainability without limits to growth, and that sustainability is a socially and politically constructed process. Malaga is on this path, adopting its first Local Agenda 21 in 1995 and it was the third Spanish city to join the European Digital Green Charter in 2010. Subsequently, in 2015, the city approved its new Urban Agenda 2050, which presents the city's current strategic sustainability framework. Later in 2018, it joined the global process to contribute to the SDGs by 2030.

Because this observatory seeks to follow international standards and shares the vision of better evidence-based decision-making in the tourism sector, strengthening the resilience and sustainability of the sector, Malaga's STO aspires to join the UN Tourism International Network of Sustainable Tourism Observatories (INSTO).

The observatory will serve all the tourism stakeholders responsible for the creation of the tourist experience in Malaga and will train them to face the collective challenges of today and tomorrow in the most informed and responsible way.

Through multisectoral and destination-wide cooperation, regular, holistic monitoring and evaluation, and reporting on the impacts of tourism, the mission of the observatory is to unlock the potential of tourism as a catalyst for positive change by bringing together all data insights that are relevant to sustainable and resilient destinations, and to provide all stake-

holders with the opportunity to create a tourism model that can balance the needs of people, the planet and prosperity.

The Observatory will monitor, evaluate and disseminate developments in Malaga and the impacts they have on the destination, its natural environment and its inhabitants. It will strive to make available holistic and reliable information for well-informed decision-making, identify risks and opportunities, develop ideas and provide recommendations and best practices for the continuous improvement of sustainable tourism and the smart management of destinations.

Its central focus will be enabling awareness, learning and evidence-based decision-making for the different target groups in Malaga's society.





02.

Objectives of the observatory

The observatory will be able to identify risks and opportunities

The establishment of the observatory represents the next logical step in Malaga's efforts to create and maintain a sustainable destination that safeguards a healthy environment for the host and visitors. This will be achieved by increasing and improving the availability of data through regular and more holistic data collection that goes beyond the traditional collection of mainly economic and market-related information. Furthermore, by making the data accessible to all tourism stakeholders in the destination and involving them in the strategic planning of the monitoring department, an inclusive monitoring approach will be ensured that fosters collaboration, trust and a general awareness and sense of collective responsibility in the destination. In addition, by generating information, the observatory will be able to identify risks and opportunities, help develop ideas, showcase best practices and provide recommendations that strengthen the sustainable and smart management of destinations.



In short, the main objective of the observatory is to turn Malaga into a centre for the transfer of knowledge and information in the field of tourism and sustainability. The detailed objectives that are necessary to achieve this vision are:

- Improving the quality of existing and potential data.
- Creating continuous and reliable perspectives on tourism trends and dynamics.
- Improving the accessibility of data available to all stakeholders.
- Increasing knowledge and understanding about tourism development.
- Providing tangible evidence on the value of tourism and its impacts.
- Strengthening data-driven decision-making.
- Facilitating the prioritisation of development decisions and actions.
- Reducing information gaps and fostering data standards. Facilitating the benchmarking of our own progress and that of other destinations.
- Increasing cooperation within and between organisations.

- Increasing the productivity and competitiveness of organisations.
- Increasing the commitment of all tourism stakeholders to sharing data
- Involving all stakeholders in strategic planning through details on indicators and priorities.
- Encouraging collective responsibility in the destination.

By improving the data landscape for tourism stakeholders in Malaga and fostering better-informed decision-making, the initiative seeks to help regions move from a primarily marketing-driven development approach to a more management-oriented development approach that follows future-proof measures of success where the net benefit to the local community plays a key role, thus creating a cultural shift around tourism management within the destination.

2.1 Alignment of objectives with the SDGs

02.1.

The city's Local Agenda 21, which was approved in March 2015, is an integral part of the city's Urban Agenda 15 and the City's Sustainable Development Strategy 2020-2050. Guided by the objectives of the Sustainable Development Goals (SDGs), the Agenda contemplates thematic areas important to the city such as the territory and configuration of the city; the management of natural resources; social cohesion and economic development, as well as governance. These areas include several sub-themes that are equally relevant to the city's tourism development. These include the process of urbanisation (densification); diversity of activities in public spaces; green zones; urban zoning; urban biodiversity; social cohesion; population characteristics; poverty trends; knowledge creation and access to education; housing issues; participation and local cooperation and financing, among others. For each of these areas, the Agenda defined a list of specific indicators that provide information on the development of these aspects over time, being a pioneer in Spain for implementing a system for following up and monitoring compliance with the SDGs and their 169 targets, as well as in presenting voluntary progress reports on the fulfilment of these SDGs.

In summer 2020, as another step in its sustainable development, Malaga approved its Climate Plan. Named Alicia, it is strategically linked to the Urban Agenda and is also aligned with the United Nations 2030 Agenda and the 17 SDGs, mainly with goal 7 (affordable and clean energy), 11 (sustainable cities and communities), 13 (climate action), 14 (life below water) and 15 (life on land), as well as with the contents of the Spanish Urban Agenda 2019.

Prepared by Malaga's Urban Environment Observatory (OMAU) and in line with the vision of the European Commission's emissions reduction targets, the plan presents a status quo analysis outlining the greatest vulnerabilities and needs, as well as a proposed roadmap towards the city's carbon neutrality by 2050, including an interim target of 55% emissions reduction by 2030.





03.

Sustainability challenges

Based on current trends and previously outlined objectives, the development of the new strategy and ongoing sustainability efforts in the city, the following tourism-related issues have been identified as high priority areas where more evidence is needed.

They are relevant to the labour of STO Málaga and will be linked to the required thematic areas of the INSTO network:

Accessibility

Regarding efforts to improve accessibility within the city, Malaga has already launched several local initiatives that were initiated in the City Council's previous Accessibility Plan of 2010.

Currently, it seeks to position the city in all its projects and strategies as an inclusive destination of national and international reference, generating synergies and coordinating public, private and social initiatives, using marketing and communication strategies that ensure the presence and visibility of the accessible offer in priority segments and markets for the destination. Regarding the accessibility area, there is a plan that is developed to achieve the main objectives in the city.

• Accessible Tourism Plan for Malaga

In compliance with the challenge set in the Strategic Tourism Plan 21-24, the Accessible Tourism Plan for Malaga has been prepared, and it was presented on October 18, 2022.

Its main objective is to promote a set of initiatives that position Malaga as a reference inclusive destination.

The Plan proposes a set of useful tools that act as levers for the development of accessibility, designed in basis of the analysis of the situation and reflection, with the aim of guaranteeing the future of the Tourism industry that is so important for the city of Malaga.

The in-depth analysis aims to provide the necessary tools for the destination to strengthen the measures implemented in recent years, collected in the form of an operational proposal. Initiatives that, necessarily, will be presented aligned with the rest of the strategic documents identified as impactful on the destination, and with a focus on the DTI Project and its Accessibility area.

→ **Accessible Tourism Roundtable:** : One of the main milestones of the Accessible Tourism Plan for Malaga, prepared by Ilunion Accessibility of the Social Group ONCE and in collaboration with the Department of Tourism, the Department of Accessibility and the city's not-for-profit fabric closely collaborated, is the establishment of an Accessible Tourism Roundtable, whose main objective is to establish a methodology on how to articulate and channel the roadmap of the actions contemplated in the Plan. The creation of this Roundtable is a clear reflection of Malaga City Council's commitment to accessibility in the destination, both for residents and tourists.



Governance

Another of the main conclusions of Malaga's new tourism strategy is the importance of advancing in the field of destination governance, especially in the field of monitoring objectives and indicators. The STO Malaga will play an important role in governance, which is why the establishment of the observatory is specifically mentioned in the strategy's action points. Although there is already a lot of information available in the city, the STO Málaga presents the opportunity to gather and extend information to all areas relevant to sustainable tourism (economic, social and environmental). This includes information of great relevance to the city, such as the continuous monitoring of the evolution of tourist apartments within the city, as well as the areas and moments of overcrowding in certain places of interest. Being able to generate this information on a regular basis and make it easily accessible to all stakeholders will allow the city to support both the public and private sectors in their decision-making processes.





Tourist Flows and Densities

Compared to other important tourist destinations in Spain, Malaga has been having one of the highest tourist saturation rates in recent years. Furthermore, the number of tourist apartments in the city has grown exponentially in recent years, which has resulted not only in more and more residents feeling dissatisfied with tourism and incidents of visible ‘tourismphobia’, but also in a decrease in residents living in the city center, as well as rising housing prices. This phenomenon, which can also be seen in many other destinations around the world, is something that will be of great importance for STO Malaga to regularly measure and inform tourism stakeholders about the latest developments and expected future trends.

Significant baseline work has already been carried out since 2016 through the Interreg ‘Alter-Eco’ project, where a variety of data points have been collected over the years, including visitor density in different neighborhoods and the existing capacities, the growth and distribution of tourist apartments by neighborhood and the evolution of the inhabitants in the different areas of the city.

Currently, the Malaga City Council is developing the Project: Sustainable Decentralization of Malaga tourism, in which 3 million euros will be invested, financed with European Funds, within the framework of the Tourism Sustainability Plans in Destinations.

The main objective of the project is to highlight other spaces and resources of the city through a series of alternative routes that manage to redirect tourist flows from more saturated areas to other areas with tourism potential. All this with the premises of respect for the essence, cultural tradition and sustainability of the resource itself, and the social, cultural and residential environment in which it is located. And always considering the main transversal strategic axes in each of the actions such as accessibility, sustainability, digitalization and conservation of cultural heritage.

The project has planned around fifteen actions divided into four programmatic axes: promotion of the green and sustainable transition, improvement of the energy efficiency, digital transition and competitiveness.

Climate Change

With about 195 days of sunshine a year, Malaga is a destination with a very favorable climate for tourism all year round.

However, due to the increase in heat waves and the worsening of drought, which have also increased over the years and have resulted in more vulnerable and degraded forest masses, the risk of forest fires has also increased around of the destination, presenting one of the greatest challenges for tourism.

Therefore, since the city now has a climate action plan with specific emissions reduction objectives and in which tourism is integrated, there is an enormous opportunity to strengthen collaboration in this area between the different departments of the Malaga City Council and public entities responsible for its execution.

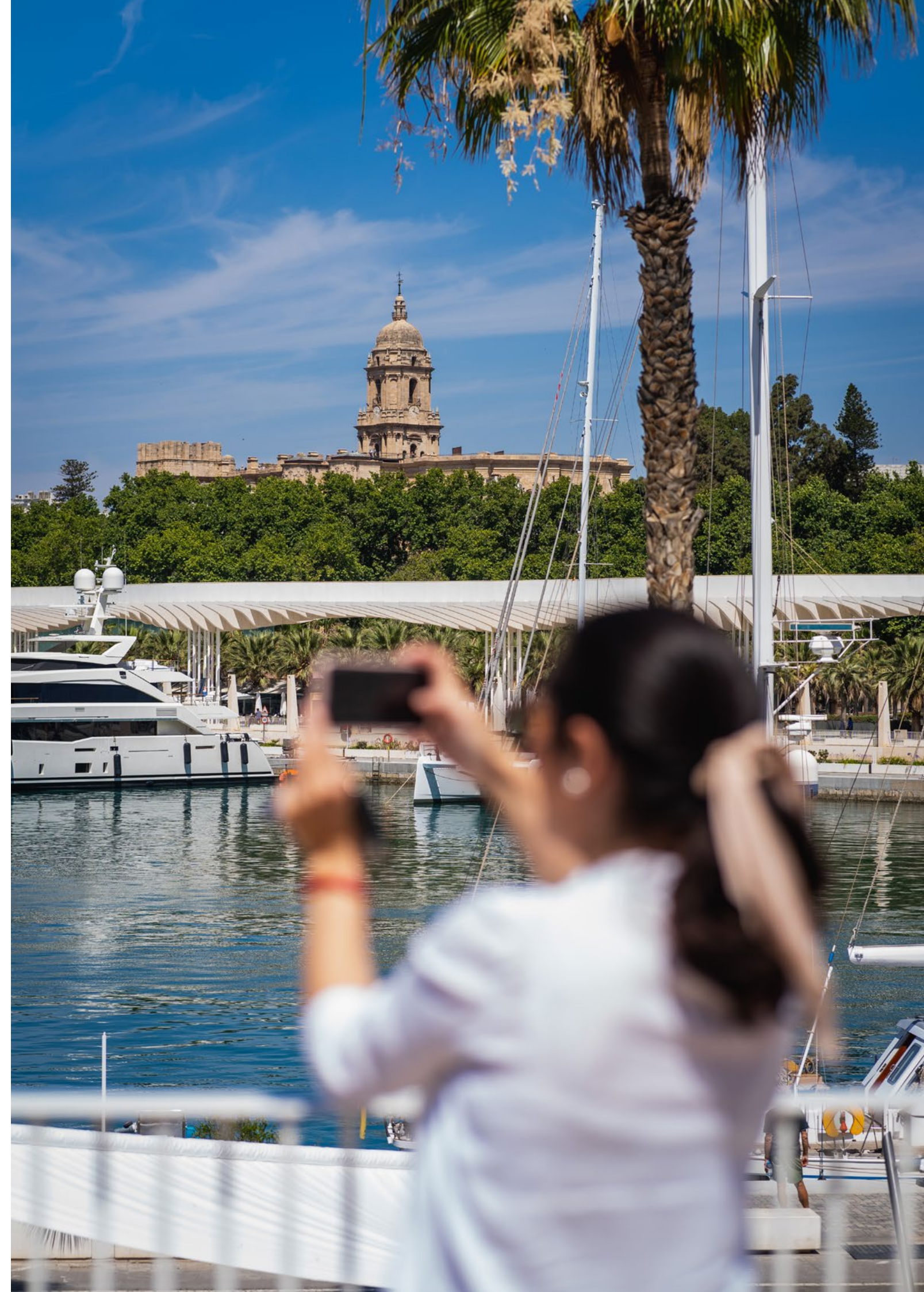
The STO Málaga will be able to support these efforts by participating in the vulnerability analysis development process, coordinating closely with the OMAU regarding the development of indicators related to climate risk.

Impact of cruises

In order to strengthen the sector even more, the current tourism strategy has developed a cruise improvement plan, according to which the premium and luxury cruise segment is being attracted.

Data was identified as a crucial element during roundtables held with the cruise industry while the strategy was being developed. This presents another important opportunity as the STO Malaga will be able to support these efforts through regular monitoring of key information related to cruise tourism in the city. This is especially important since the strategy also highlights the objective to position Malaga as a “green port”, which is not overcrowded and in perfect harmony with the destination.

In addition to the key monitoring areas for Malaga mentioned above, other monitoring topics that derive from the current tourism strategy and will be integrated over time into the work of the STO Malaga.





Governance

To advance in sustainability it is important to have a clear strategy, and in this case, Malaga not only has a clearly defined tourism strategy, but is also supported by other sectoral and territorial plans that are of interest for tourism governance.

The Malaga Tourism Strategic Plan (2021-2024) is one of the main means of coordination in the sector. The plan promotes a Smart Tourism Destination (STD) planning model based on governance, innovation, technology, sustainability and accessibility, with objectives and actions related to the Sustainable Development Goals (SDGs). In addition, to join such an STD network, the city had to undergo a comprehensive review of its activities in 2019, with a focus on the five main pillars of a smart destination: Governance, Innovation, Technology, Sustainability and Accessibility. The results of the diagnostic study showed that Malaga met more than 80% of the requirements, which enabled the city to become an official member of the Smart Destination Network. In the area of governance, sustainability and accessibility, which are especially important for the work of the INSTO network, the following recommendations for improvement were made in the study:

Governance

- Improving and expanding the monitoring of indicators to improve the understanding of all the impacts of tourism in the destination.
- Improving coordination between departments and organisations.
- Increasing training efforts to ensure that all personnel are prepared for the new needs and services derived from the smart destination.
- Increasing transparency and public participation in tourism planning.

Sustainability

- > Initiating monitoring of resident satisfaction.
- > Exploring measures to avoid overtourism.
- > Increasing the evidence on the environmental impact of tourism.
- > Including tourists in activities to strengthen sustainability.
- > Increasing actions to strengthen sustainable consumption and production.
- > Developing tourism-relevant emergency/crisis management plans

Accessibility

- > Updating municipal accessibility rules.
- > Developing an accessibility strategy for the destination.
- > Developing tools to monitor the implementation of accessibility standards.
- > Implementing training courses for tourism employees and stakeholders.
- > Reviewing the tourism value chain for level of accessibility.
- > Improving access in public spaces and events as well as digital spaces.
- > Increasing promotion and information to tourists.

This STD model is preceded by a strong focus on digitalisation and innovation. This has allowed anyone who wishes to do so to access multiple sources of data important for the city's tourism. For example, Malaga has several tools for accessing data related to its citizens or tourists, including: "Smart Tourist Data". This is a technology tool at the regional level involving the participation of the University of Malaga, which allows destinations and companies to improve the customer experience.

Through the City Council's Open Data Portal, Malaga is also committed to making all types of data available to anyone for free, with more than 700 data sets currently available. Data can be accessed in different formats to ensure transparent information flow and development of useful applications based on these data points.

Also, through Local Agenda 21, integrated into the Urban Agenda, several indicators can be found that have a link with tourism actions. For example, there are indicators that offer useful information to balance the proportion of activities to avoid existing predominant uses (hotels and franchises); to limit the use of hotels, apartments, hostels and maximise the use of bed & breakfast accommodation; to improve the quality of public spaces; to promote more sustainable mobility models; and to minimise the acoustic impacts caused by the proximity of the airport.

In terms of tourism data, Malaga has been monitoring key economic indicators on a regular basis for many years, which is why the city has a variety of different perspectives with historical data going back to 2008 and earlier. While in the past, most of the information was used primarily for marketing and policy planning purposes, there has been a shift towards expanding the information and making it publicly available.



Structure of the Observatory 04.1.

STO Málaga está liderado por el Área de Turismo y Promoción de la Ciudad del Excmo. Ayuntamiento de Málaga, y cuenta con el apoyo tanto del resto de áreas municipales como de los principales representantes del sector turístico.

La Comisión STO Málaga surge a efectos de oficina técnica y, tiene las siguientes funciones:

- Coordinate, execute and monitor the activities carried out by STO Málaga as a member of the INSTO Network.
- Carrying out monitoring and control of the thematic areas and indicators established by the INSTO Network.
- Manage and ensure the destination's participation in the activities of the INSTO Network.
- Promote the participation of the destination in projects at the provincial, regional, national and European level.
- Ensure the transparency of the activity carried out within the INSTO framework, regularly informing the social agents involved.

The STO Málaga Commission is made up of the following members:

- Internal coordination.
- Committee of experts.
- Research partners.
- Group of Local Actors.
- Tourism Forum.
- Working groups:
 - Segment Technical Roundtables
 - STO Málaga Expert Roundtables
 - Accessible Tourism roundtable

Presidency

The commission is supported by the highest political official of the city of Malaga, leading and presiding over this coordination body, thus evidencing the political commitment to the tourist and resilient development of the destination. Therefore, the Presidency will correspond to the Mayor of Malaga, Mr. Francisco de la Torre Prados.

The Mayor may be replaced by the Delegate Councilor for the Department of Tourism and Promotion of the City, Mr. Jacobo Florido Gómez.

Internal Coordination

The Department of Tourism and Promotion of the City is the internal coordination area in charge of carrying out the promotion, coordination, support and promotion of the city of Malaga as a member of the INSTO Network.

For the INSTO Network, participatory approaches are fundamental to the success of sustainability initiatives that are continually strengthened during all phases of development. As members of the INSTO Network, STO Málaga places special emphasis on 3 key elements:

1. Create awareness among local actors.
2. Establish and foster a strong support system of facilitators.
3. Formation and participation of a local work group.

The functions of the Department of Tourism and Promotion of the City are:

- Promote the integration of the various areas in the development and implementation of the destination's tourism strategy.
- Promote dialogue between the areas and knowledge of the different departmental initiatives, combining interests for the benefit of the tourist development of the destination.
- Share projects and actions linked to tourism in the various areas of the Local Entity.
- Promote the joint development of actions between the Department of Tourism and Promotion of the City and other related areas.
- Present results and monitor and control the implementation of the territorial and/or tourism policy, as well as the set of actions linked to tourism in the destination.
- Identify needs, areas of improvement and new services that require a common response between the different areas.
- Establish and promote a support system among local actors related to the tourism sector.

The Department of Tourism and Promotion of the City has created a specific generic mailbox for communications related to the STO Málaga Monitoring Commission.

Expert Committee

The experts appointed by the representatives of the areas directly linked to the transversal axes related to the tourism development of Malaga form part of the Committee of Experts of the Monitoring Commission.

Presidency Government Department

Within the Government and Presidency Department, including the Area of Mayor's Office, there is a Communication Department. The presence of this area is essential so that all the actions of the destination are in line with different strategies of Governance.

In this way, the implementation of specific strategies that improve the resilience and comprehensive management of the destination is guaranteed, as well as:

- Strategic vision and implementation.
- Efficient management.
- Transparent, open and participatory management.
- Responsible and controlled management.

Environmental Sustainability Department

Tourism sustainability is a transversal tool for the continuity of tourism activity in the future, with all quality and well-being standards for both tourists and residents. Therefore, it is essential to have this area in order to guarantee the existence of following areas:

- Tourism sustainability management.
- Conservation of cultural heritage.
- Environmental conservation.
- Economic and social development.

Department of Innovation, Urban Digitalization, Promotion of Technological and Business Investment, and Investment Capture.

Innovation is understood as the introduction or improvement of new services, processes, marketing or organizational methods in the internal practices of the Destination Management Entity and in its external relationship with its residents and tourists with the aim of improving the benefit they provide and its competitiveness. The Urban Innovation and Digitalization Department has, among its main functions, the alignment of the work of the municipal organization by achieving the Sustainable Development Goals (SDG), the digitalization of services, the implementation of measures aimed at evaluating and improving the energy and environmental situation of the City and the technological modernization in ICTs of the Malaga City Council.

Therefore, with the incorporation of this area in the Monitoring Commission, there are key areas of a destination STD related to:

- Technologies applied to governance.
- Technologies applied to tourism marketing.
- Technological infrastructures of the destination.
- Tourism knowledge systems.



Office of Social Rights, Diversity, Equality and Accessibility

Universal accessibility involves well developed tourism that allows not only the access, use and enjoyment to all people, without exclusions, guaranteeing the equal opportunities, but also allows to enjoy environments, goods, services, products, technologies, etc. In the safest, most comfortable, most autonomous and natural way possible. The application of universal accessibility presupposes the application of the strategy of ‘universal design or design for all people’, and it is understood without prejudice as the reasonable adjustments that must be adopted.

Therefore, in collaboration with the Accessibility Department, the following areas of action are monitored:

- Regulatory framework.
- Accessibility Management.
- Implementation in the destination.
- Technological tools.

Office of Citizen Participation, Migration, Foreign Action, Development Cooperation, Transparency and Good Government

Among the functions of the Citizen Participation Department are the preparation and coordination of the Open Government Plan of the City of Malaga, Transparency and Good Government and the coordination of the Sector Councils. All of this is necessary to evaluate local satisfaction with tourism, considering citizen participation in making strategic decisions for the city and manage the destination with a governance model based on efficiency and transparency.

Office of Culture and Heritage

One of the main functions of the Culture Department is the coordination of the city’s cultural policy, the fundamental basis of a resilient tourism model based on respect for the sociocultural authenticity of the destination, in which tourist resources and attractions are valued and cultural assets.

Málaga Fair and Congress Palace_FYCMA

Regarding responsible management, FYCMA is a fundamental axis in terms of the coordination and management of tourist events and a necessary collaborator in measuring the impact of the events held in the city.

Department of Mobility

In tourism management, the mobility strategy is marked by sustainability and intermodality in transportation.

Research Partners

Research partners are those collaborating entities that share interest in promoting Malaga as a Smart Tourist Destination. The main research partners of Malaga City Council are:

University of Malaga (UMA)

The University of Malaga is a fundamental collaborator in knowledge management. Malaga City Council collaborates with the University of Malaga in all those projects in which it is necessary to promote the generation and significant advancement of scientific knowledge and research of proven quality as well as to move towards the search for solutions to society's challenges.

Andalusian Institute for Research and Innovation in Tourism (IATUR)

The Institute, which is based in Malaga, is established as an Andalusian Knowledge Center of the Universities of Malaga, Granada and Seville. It has a multidisciplinary scientific team of almost 70 members, and assumes the role of interlocutor between the tourism sector and advances in knowledge, with the main purpose of showing and transferring R&D in this field.

CIEDES Foundation

The Ciedes Foundation is a private non-profit foundation, made up of the main institutions and entities of the city. Created on July 27, 1994, its birth was a milestone at national level because it was the first time that all the institutions and the main economic and social stakeholders of a city took the step of joining forces to work together for the future.

Involved in Malaga's strategic plan with Agenda 2023, the time and actions implemented have shown that the Foundation has been a fundamental instrument for the development of Malaga and the design of its city model in a plural, participatory and consensual way, based on the Strategic Planning tool.

Local stakeholder group

The main network of local stakeholders that collaborate as key elements in the development of Malaga as a Smart Tourism Destination is the TOURISM FORUM.

Since its inception, the Malaga City Tourism Forum has been the ideal setting for the exchange of ideas, joint analysis of the tourism situation in our destination and decision-making, as well as an example of public-public and public-private collaboration.

In fact, a series of actions have been developed in this body that have improved the positioning of Malaga 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.

Currently the TOURISM FORUM is formed by the Malaga City Council (Tourism, Culture and Sports Departments); the Airport, the Port, the Malaga Trade Federation (Fecoma), Tourism and Planning Costa del Sol; the Professional Association of Tourist Informers (APIT), the Confederation of Businessmen of Malaga (CEM); the Chamber of Commerce; the University of Malaga; the Association of Hotel Entrepreneurs of the Costa del Sol (Aehcos); the Association of Spanish Schools; the Historical Center Association; the Association of Hotel Business Owners of Malaga (MAHOS), the Business Association of Travel Agents (Aedav); the Association of Vehicle Rental Companies; the Fairs Palace and Málaga Convention Bureau.

Working groups

Working groups associated with any specific topic may be constituted within this committee, just as any other representative of reference entities in tourism for the entity, experts or other stakeholders in the territory may participate as advisors who, due to their knowledge, can contribute value by contributing and facilitating the evolution of the destination to the Smart Tourism Destination model.

The working groups currently established in the field of tourism and promoted by the Department of Tourism and Promotion of the City are as follows:

STO Málaga Expert Roundtables

The United Nations International Network of Sustainable Tourism Observatories (INSTO) monitors the economic, environmental and social impact of tourism at the destination level. The initiative is based on the United Nations' commitment to the sustainable and resilient growth of the sector through measurement and monitoring, supporting evidence-based tourism management.

Among its objectives are to foster a dynamic network of partners who strive to create healthy places for both visitors and communities while leaving resilient destinations for future generations.

For the Network, one of the fundamental pillars is the necessary participation of the sector in decision-making. For this reason, the Department of Tourism and Promotion of the City, in collaboration with the CIEDES Foundation, has established different Roundtables of Experts based on the alignment of the City's Strategic Plans with the thematic study areas established by the INSTO Network.

In these Roundtables, which have been organized into thematic blocks: Environmental Sustainability, Economic Sustainability, Social Sustainability and Governance, participants identify needs, sources of information, indicators and make proposals related to the different areas of study.





Thematic blocks

| Thematic blocks | Areas under study |
|--------------------------|--|
| Economic Sustainability | <ul style="list-style-type: none">• Sustainable audiovisual production• Employment• Economic benefits at destination level• Tourism seasonality |
| Sostenibilidad social | <ul style="list-style-type: none">• Social events• Local satisfaction• Accessibility• Education• Training in sustainability and health-related information |
| Sostenibilidad ambiental | <ul style="list-style-type: none">• Energy management• Water management• Wastewater management• Solid waste management• Climate change |
| Gobernanza | <ul style="list-style-type: none">• Mobility (including cruise ships)• Tourism offer• Governance |

Nota: For more information on the STO Málaga Expert Roundtables, you can consult page [150](#).

Segmented Technical Roundtables

Segmented technical panels are constituted within the framework of the Strategic Tourism Plan, composed of representatives and professionals related to any of the tourism segments. In these panels, experiences are exchanged, the potential of each tourist segment is studied in depth, new opportunities for promoting the destination are explored and proposals and suggestions for the preparation of the Tourism Strategic Plan of Malaga City Council’s Department of Tourism are collected.



Among the Technical Roundtables already constituted are the following:

- Eno-Gastronomic Technical Roundtable.
- Nature, Sun and Beach Tourism Technical Roundtable.
- Cultural Tourism Technical Roundtable.
- Premium Tourism, Golf and Shopping Technical Roundtable.
- Cruise Ship Tourism Technical Roundtable.
- Educational-Language Tourism Technical Roundtable.
- MICE Technical Roundtable.
- Cinematographic and Audiovisual Technical Roundtable.
- Health and Well-being Technical Roundtable.

Some of these are in the creation phase, such as the Family Tourism Technical Roundtable.

Accessible Tourism Roundtable

Within the Accessible Tourism Plan, it is necessary to highlight the importance of the constitution of the Roundtable, as the first milestone after the presentation of the Accessible Tourism Plan made on October 18, 2022, which reflects the firm commitment of the City Council of Malaga with accessibility in the destination, both for residents, visitors and tourists, and for which the support and collaboration of the main associations in terms of accessibility in the city is essential, most of which are represented in the Group of Development of Malaga, made up of 81 entities.

This Roundtable outlines the roadmap to work on the execution of the 24 actions contemplated in the Plan, also serving as a link with other administrations and companies to promote accessibility in tourist services and infrastructure in the city.





Overview of Reports

The Department of Tourism and Promotion of the City, in collaboration with the University of Malaga through the Andalusian Institute for Research and Innovation in Tourism (IATUR), was responsible for the creation of the reports presented below:

In the first place, the mandatory thematic areas to be developed by UN Tourism are:

- 1. Energy management.
- 2. Water management.
- 3. Wastewater management.
- 4. Solid waste management.
- 5. Climate change.
- 6. Employment.
- 7. Economic benefits at destination level.
- 8. Local satisfaction.
- 9. Accessibility.
- 10. Tourism seasonality.
- 11. Governance.

In addition to these, Malaga suggests other variables to include to complement the study. These are:

- 12. Mobility (including cruise ships).
- 13. Sustainable audiovisual production.
- 14. Sustainable events.
- 15. Education and training in sustainability.
- 16. Health-related information.
- 17. Tourism offer (integrated into the seasonality offer).

The following table shows brief descriptions of the thematic areas and the current status of each of them:

Table 1. CHECKLIST OF THE AREAS OF ACTION MONITORED DURING THE REPORTING PERIOD

| Thematic Area | Description | Status |
|----------------------------|--|---|
| 1.Estacionalidad Turística | This report contains useful information for tracking the number of visitors and overnight stays by nationality and type of accommodation, as well as their evolution by years and months. It aims to help identify peaks and troughs, helping to manage tourism flows. | All the indicators required by UN Tourism are available for the seasonality report. In addition, some extra indicators are included, and work is being done on a specific methodology for their measurement. |
| 2. Employment | This report seeks to measure the impact that tourism activities have on employment in the city. To this end, their evolution over time in recent years is studied, with emphasis on the seasonality and duration of contracts. In addition, it provides a breakdown of tourist employment by branch of activity and gender. | A large number of indicators are available in the report. The employment data of contracts are disaggregated by the economic activities listed in the CNAE-09, which are insufficient to cover all the activities that make up the tourism industry. Therefore, employment in the following activities is accounted for: accommodation services (division 55), catering services (division 56), and activities of and relating to travel agencies and tour operators (division 79). |
| 3. Economic benefits | This report stresses the importance of identifying the economic benefits produced by tourism, given the multiplier effect derived from tourist spending at the destination. | This report includes a large amount of data referring to spending and economic impact. However, more work needs to be done to include more data on earnings in the destination. |
| 4. Governance | Governance focuses not only on economic progress but is grounded in social development and institution-building. This report details those policies and best practices, highlighting participation and collaboration, showing the progress of the destination in tourism management and sustainability. | This report is based on qualitative data obtained from interviews. Some required indicators of a more quantitative type are pending, such as: Amount of funding available per year for tourism development. % of area subject to control (density, design, etc.). % of area used for tourism purposes, for buildings % of construction proposals that are subject to an environmental review or undergo an environmental impact assessment (EIA) |
| 5. Local satisfaction | The satisfaction of both locals and visitors plays a crucial role in the development of the destination to preserve the quality of life and the quality of the holiday. Therefore, this study tries to address satisfaction with the destination by combining resident and tourist perception of the destination. | This report is at an advanced stage. Surveys or reports on the perception of tourism and the sustainability of the residents themselves are needed, with more detailed and specific reports. |
| 6. Climate change | This report collects and analyses information from the city's climate action plan with specific emission reduction objectives and in which tourism is integrated. | The city's Department of Tourism has not specifically gathered information on the indicators related to the thematic area of climate change for tourism purposes in the past. However, much information is available thanks to the data collection efforts of destination organisations, such as the city's Urban Environment Observatory (OMAU). In the context of the Alicia Plan, efforts are currently being made to define new climate-related indicators for tourism too. |
| 7. Energy management | This report is intended to be useful for the pursuit of energy efficiency, addressing current and future challenges related to energy supply, the climate crisis and resource management, as well as providing an opportunity for companies to improve their competitiveness. To this end, it shows in detail the city's energy consumption, broken down by different types of activity. | The city's Department of Tourism has not specifically gathered information on the indicators related to the thematic area of energy management for tourism purposes in the past. However, much information is available thanks to the data collection efforts of destination organisations, such as the city's Urban Environment Observatory (OMAU). An effort needs to be made to collect information from the tourism sector on this subject in greater detail. |

Table 1. CHECKLIST OF THE AREAS OF ACTION MONITORED DURING THE REPORTING PERIOD

| Thematic Area | Description | Status |
|--|---|--|
| 8. Water management | Water consumption began to be an issue to consider some time ago, given the problems derived from the drought, as well as the increase in the consumption of potable water for extensive agricultural irrigation, sports activities, swimming pools and golf courses. This report addresses this problem by presenting the actions that the destination is taking to manage the situation, showing consumption savings objectives and water quality data, among others. | The city's Department of Tourism has not specifically gathered information on the indicators related to the thematic area of water management for tourism purposes in the past. However, much information is available thanks to the data collection efforts of destination organisations, such as the city's Urban Environment Observatory (OMAU). An effort needs to be made to collect information from the tourism sector on this subject in greater detail. |
| 9. Wastewater management | This report highlights how essential it is to regenerate and reuse wastewater within overall water management. It also highlights the importance of tertiary wastewater treatment as a key measure to protect the environment and improve people's quality of life. | The city's Department of Tourism has not specifically gathered information on the indicators related to the thematic area of climate change for tourism purposes in the past. However, much information is available thanks to the data collection efforts of destination organisations, such as the city's Urban Environment Observatory (OMAU). An effort needs to be made to collect information from the tourism sector on this subject in greater detail. |
| 10. Solid waste management | This report analyses the trends in recent years in the generation of municipal solid waste in the city of Malaga, analysing the amount and composition of the waste and how it is managed and treated. In addition, the disposal of waste by the different methods and those attributable (by month or season) to actions derived from the tourism sector are studied. | The city's Department of Tourism has not specifically gathered information on the indicators related to the thematic area of climate change for tourism purposes in the past. However, much information is available thanks to the data collection efforts of destination organisations, such as the city's Urban Environment Observatory (OMAU). An effort needs to be made to collect information from the tourism sector on this subject in greater detail. |
| 11. Accessibility | This report provides an overview of the accessible tourism offer to provide a solid basis for future measurement activities. In addition, it presents the planning and initiatives that the city is carrying out to continue advancing in this area. | At the moment, progress with the destination's Accessible Tourism Plan has made it possible to collect certain information and indicators. For the first year of establishment of the Observatory, further planning and basic inventory activities (e.g., creating an overview of accessible establishments with their specific characteristics) are expected to provide a solid basis for future measurement activities. |
| 12. Tourism offer (integrated into the thematic area of seasonality) | This report complements the seasonality report, offering information on the city's accommodation and cultural offer. It includes the evolution over time of available beds and the occupation of different accommodation types, as well as data related to the most visited events and monuments. | The availability of data in easily accessible official sources has enabled this report to include a high number of data. Few indicators remain to be improved, such as being able to identify the events held by season or the longevity of the establishments. |
| 13. Mobility (inc. cruise ships) | This report provides detailed information on passenger traffic on different modes of transport: plane, train and cruise ship. In addition, it is complemented by information on internal mobility (bus and metro). | This report has a large number of indicators. As part of the process and as an opportunity for improvement, we will try to expand the information on passengers using the different means of transport, categorised by nationality, as well as obtaining data on the expenditure of cruise passengers and the employment generated in the transport sector. |

Table 1. CHECKLIST OF THE AREAS OF ACTION MONITORED DURING THE REPORTING PERIOD

| Thematic Area | Description | Status |
|---|--|--|
| 14. Sustainable audiovisual production | The “Rueda en verde” eco-friendly and sustainable production approach aims to develop sustainable practices that prevent or minimise the environmental impact derived from the audiovisual activities carried out in the city. This report shows how the destination is a pioneer in this area, offering the possibility of guiding and obtaining a stamp of sustainable production. | This report includes little data, but this is due to the city’s recent commitment and strategy to invest in sustainable production, creating a stamp for sustainable production in 2021. The City Council’s close relationship with Malaga Film Office will make it easier to improve and work on new indicators to complement the report. |
| 15. Eventos Sostenibles | The city has a management system for applications to organise sustainable events, which includes all those events that meet the requirements established in the Municipal Environmental Awareness Programme. This report aims to explain this programme in detail, as well as to emphasise its importance. | Although we have little data, since adequate records were not kept before 2019, we can say that more sustainable events are planned every year and requests for more certified events are monitored. |
| 16. Sustainable events | This report seeks to assess and analyse various actions and policies that influence overall wellness in the destination, from social determinants to equitable access to health care services, which promote health and prevent disease. | This voluntary report already has information available, which should be improved, advancing in indicators that serve for its measurement. |
| 17. Education and training in sustainability | This report aims to provide information on programmes and actions aimed at raising awareness among the local community and tourists. It also details the work of those agencies and institutions responsible for promoting such environmental education. | This voluntary report already has information available, which should be improved, advancing in indicators that serve for its measurement. |





- Interpretation of LFS (INE) data carried out by Turespaña for autonomous communities and the national set
- Alicia Plan
- Urban Environment Observatory (OMAU)
- Ministry for Sustainability, Environment and Blue Economy. Carbon Footprint of the municipalities of Andalusia
- AENA
- Malaga Tourism Observatory
- Multi-territorial Information System of Andalusia, IECA
- CISA studies. Centre for Applied Social Research. Satisfaction
- Municipal Environmental Awareness Programme. Malaga, how do I love you!?
- Malaga Municipal Healthy City Plan
- Accessible Tourism Plan for Malaga

Table of detailed indicators and sources 05.1.

After the description of the thematic areas that appear in the reports, it is important to be able to quantify the progress and results obtained to date. To this end, a process of evaluation and monitoring of the indicators required by UN Tourism in each of the reports has been carried out. The list of most used sources is summarised below:

- INE. Survey of Hotel and Holiday Apartment Occupancy.
- Data Office. Public Company for the Management of Tourism and Sport. Regional Government of Andalusia.
- CIEDES Foundation.
- Labour Force Survey (LFS). Employment Reports of the Tourism Sector in Andalusia (Areas and Provinces).
- Costa del Sol Tourism and Planning: Big data .
- Statistics for municipalities from the State Public Employment Service (SEPE) for municipalities with more than 45,000 inhabitants and capitals by economic activity and age.

Lastly, in the table below you can see the total number of indicators, the value of the last two years analysed in the reports or failing that, the last available value and its source in more detail.

A colour code is established, which is explained below:



White: Indicators required by UN Tourism with available information.



Orange: Indicators required by UN Tourism not currently available



Yellow: Indicators required by UN Tourism, which can be incorporated soon.



Blue: Indicators not required by UN Tourism, added on a voluntary basis

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|-------------------------------|---|---|--|--|---------------|---|
| Tourism Offer and Seasonality | Total visitors (overnight stays/day-trippers and by origin: national vs. International), hotels | INE. Hotel Occupancy Survey. | Total: 2,874,198 National: 1,134,397 International: 1,739,801 | Total: 1,798,668 National: 972,898 International: 825,770 | | This source does not count day-trippers |
| | Total visitors (overnight stays/day-trippers and by origin: national vs. International), holiday apartments | INE. Holiday Apartment Occupancy Survey | Total: 671,186 National: 203,283 International: 467,903 | Total: 443,214 National: 226,698 International: 216,516 | | This source does not count day-trippers |
| | Total visitors (overnight stays/day-trippers and by origin: national vs. International), day-trippers | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Total: 1,264,081 National: 44.22% International: 55.78% | Total: 1,829,234 day-trippers National: 74.20% International: 25.80% | | This source includes average stays for other accommodation types. |
| | Average stay in hotels and by origin | IECA/INE | Hotel: 2.20 Hotel national visitors: 1.93 Hotel international visitors: 2.42 Apartment: 5.48 Apartment national visitors: 3.43 Apartment international visitors: 6.42 | Hotel: 2.19 Hotel national visitors: 2.02 Hotel international visitors: 2.42 Apartment: 4.5 Apartment national visitors: 3.5 Apartment international visitors: 6.3 | | This source also includes the average and differentiated stay by nationality for holiday apartments |
| | | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Hotels, hostels and guest houses 6.78 Holiday apartments: 8.35 VUT (holiday property): 8.51 Overall average stay: 7.89 | Hotels, hostels and guest houses 4.86 Holiday apartments: 6.49 VUT: 6.83 Overall average stay: 5.74 | | This source includes average stays for other accommodation types. |
| | Hotel occupancy | INE. Hotel Occupancy Survey. Costa del Sol Tourism and Planning | January: 35.7 February: 51.1 March: 56.3 April: 67.6 May: 67.4 June: 69.8 July: 73 August: 76.6 September: 68.1 October: 65.4 November: 55.3 December: 55.9 | January: 17.79 February: 18.00 March: 27.08 April: 28.57 May: 44.03 June: 58.23 July: 73.32 August: 82.75 September: 77.23 October: 77.43 November: 68.95 December: 56.71 | | It has been decided to modify the variation from annual to monthly, to better address seasonality. |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|-------------------------------|--|---|--|---|---------------|--|
| Tourism Offer and Seasonality | Total number of listings by property type and category (& annual variation) | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Hotel establishment: 88 1-star hotels: 7 2-star hotels: 19 3-star hotels: 27 4-star hotels: 31 5-star hotels: 4 Hotel accommodation - guest house: 87 1-star hostel: 14 2-star hostel: 10 Guest house: 63 Holiday apartments: 221 Apt. First (3 and 4 keys): 12 Apt. Second: 124 Apt. Third (1 key): 85 Rural guest house: 43 Basic rural guest house: 40 Superior rural guest house: 9 VTAR (rural holiday property): 43 VUT: 8370 Tourist camping: 2 TOTAL: 8854 | Hotel establishment: 85 1-star hotels: 7 2-star hotels: 18 3-star hotels: 27 4-star hotels: 29 5-star hotels: 4 Hotel accommodation - guest house: 89 1-star hostel: 13 2-star hostel: 10 Guest house: 65 Holiday apartments: 203 Apt. First (3 and 4 keys): 12 Apt. Second: 115 Apt. Third (1 key): 76 Rural guest house: 43 Basic rural guest house: 36 Superior rural guest house: 9 VTAR: 42 VUT: 6803 Tourist camping: 1 TOTAL: 7266 | | This source includes both the number and the places of each type of accommodation. |
| | Total no. of tourism businesses (& no. of new businesses per year) | ATR. Andalusia Tourism Registry | (Data 2023) 142 travel agencies 45 (AIAT) 1 eco-tourism company 63 active tourism companies 56 restaurant and catering tourism companies | | | For new companies per year, the source is the number of commercial, hospitality and hotel licences per year. This is included in another indicator, under Economic benefits. |
| | Age of tourist establishments (by sub-sector) | ATR. Andalusia Tourism Registry | | | | It can be calculated from this source. Pending incorporation in subsequent reports. |
| | Number of tourism companies open all year round (by sub-sector) | X | X | | | X |
| | Special events (e.g., festivals, conferences) held in high and low season (number of events, participants) | CIEDES. OPEN DATA.Tourism: Events held + participants in events | No. of events: 420 No. of participants: 118,151 | No. of events: 171 No. of participants: 42,261 | | It does not include seasonal event information. This information could be improved by incorporating information obtained from the MÁS MÁLAGA website. |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|-------------------------------|---|---|--|--|---------------|----------|
| Tourism Offer and Seasonality | Total number of beds - accommodation | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Hotel establishment: 11,274 1-star hotels: 170 2-star hotels: 1,388 3-star hotels: 2,824 4-star hotels: 5,939 5-star hotels: 953 Hotel accommodation - guest house: 3,208 1-star hostel: 765 2-star hostel: 726 Guest house: 1,720 Holiday apartments: 6,286 Apt. First (3 and 4 keys): 446 Apt. Second: 3,520 Apt. Third (1 key): 3,520 Rural guest house: 448 Basic rural guest house: 359 Superior rural guest house: 9 VTAR: 320 VUT: 41,440 Tourist camping: 2 TOTAL: 62,976 Variation in beds: 14.80% | Hotel establishment: 10,667 1-star hotels: 170 2-star hotels: 1,351 3-star hotels: 2,824 4-star hotels: 5,369 5-star hotels: 953 Hotel accommodation/guest house: 3,465 1-star hostel: 748 2-star hostel: 748 Guest house: 1,969 Holiday apartments: 5,937 Apt. First (3 and 4 keys): 438 Apt. Second: 3,303 Apt. Third (1 key): 2,196 Rural guest house: 423 Basic rural guest house: 332 Superior rural guest house: 91 VTAR: 315 VUT: 34,888 Tourist camping: - TOTAL: 55,695 Variation in beds: 8.36% | | |
| | Average price by type of accommodation: hotels | INE. Hotel occupancy survey | January: 81.91 February: 92.61 March: 97.07 April: 113.66 May: 116.78 June: 125.92 July: 130.52 August: 139.57 September: 127.78 October: 119.41 November: 106.49 December: 112.68 | January: 67.83 February: 64.18 March: 69.19 April: 71.66 May: 83.78 June: 87.35 July: 99.01 August: 115.45 September: 107.39 October: 101.47 November: 98.07 December: 91.99 | | |
| | Average price by type of accommodation: Holiday accommodation | COSTAL DEL SOL TOURISM BIG DATA | January: 96.48 February: 98.73 March: 101.42 April: 87.77 May: 63.78 June: 66.99 July: 70.31 August: 73.37 September: 64.32 October: 60.61 November: 71.94 December: 78.66 | January: 35.35 February: 34.31 March: 34.92 April: 35.89 May: 36.15 June: 37.85 July: 40.71 August: 45.44 September: 38.03 October: 37.49 November: 33.96 December: 55.51 | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|-------------------------------|--|---|---|---|---------------|----------|
| Tourism Offer and Seasonality | Total number of galleries | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | 18 | | | |
| | Total number of points of interest | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Monuments and places of interest: 55 Museums: 40 Gastronomic zones: 7 | | | |
| | Total area of pedestrian zones (Hcs.) | Urban Environment Observatory (OMAU) | 144km | 144km | | |
| | Estimated number of beds in hotels and holiday apartments | INE. Hotel Occupancy Survey and Holiday Apartment Occupancy Survey | Hotels: 150,586 Holiday apartments: 51,115 | Hotels: 125,481 Holiday apartments: 47,818 | | |
| | Overnight stays made by country of residence in hotel establishments | INE. Hotel Occupancy Survey. | UK: 286,679 Germany: 137,153 France: 132,073 Italy: 126,731 Netherlands: 149,017 Belgium: 74,124 | UK: 85,983 Germany: 63,895 France: 104,684 Italy: 51,584 Netherlands: 88,665 Belgium: 45,429 | | |
| | Overnight stays made by country of residence in holiday apartments | INE. Holiday Apartment Occupation Survey | UK: 69,166 Germany: 46,987 France: 33,146 Italy: 35,026 Netherlands: 71,724 Belgium: 22,416 | UK: 24,293 Germany: 63,895 France: 27,580 Italy: 22,063 Netherlands: 31,128 Belgium: 11,343 | | |
| | Annual variation in estimated beds in hotels and holiday apartments | INE. Hotel Occupancy Survey and Holiday Apartment Occupancy Survey | Growth rate compared to 2019: Total: 9.2% Hotels: 8.0% Holiday apartments: 12.9% | Growth rate compared to 2019: Total: -6.2% Hotels: -10.0% Holiday apartments: 5.7% | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|-------------------------------|--|---|--|--|---------------|--|
| Tourism Offer and Seasonality | Occupancy of holiday accommodation (and monthly variation) | Turismo y Planificación Costa del sol | January: 69.5 February: 75.0 March: 78.6 April: 79.5 May: 75.3 June: 78.8 July: 75.8 August: 81.9 September: 74.6 October: 68.3 November: 62.0 December: 64.0 | January: 22.0 February: 20.4 March: 25.6 April: 30.1 May: 44.9 June: 57.8 July: 71.4 August: 80.9 September: 71.5 October: 77.9 November: 83.2 December: 77.5 | | It has been decided to modify the variation from annual to monthly, to better address seasonality. |
| | Occupancy of holiday apartments (and monthly variation) | INE. Hotel Occupancy Survey. Costa del Sol Tourism and Planning | January: 29 February: 35.2 March: 34.4 April: 55.5 May: 49 June: 50.6 July: 55.2 August: 57.1 September: 43.2 October: 38.8 November: 30.7 December: 35.3 | January: 9.13 February: 10.26 March: 9.97 April: 10.72 May: 16.23 June: 23.44 July: 37.92 August: 53.57 September: 40.43 October: 40.16 November: 41.63 December: 37.77 | | It has been decided to modify the variation from annual to monthly, to better address seasonality. |
| | Tourist profile: average age | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | 41.37 years | 36.19 years | | |
| | Tourist profile: main reason for travel | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Holidays (91%) Among the specific reasons for choosing holiday, the following stood out: sun and beach (24.74%), leisure and recreational activities (16.94%), cultural reasons (16.64%) and living an experience (13.11%). | Holidays (67.6%) Specific holiday reasons included: living an experience (28.62%), sun and beach (16.42%) and cultural reasons (15.61%). | | |
| | Tourist profile: information most consulted by the tourist | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Accommodation and transport | Accommodation and transport | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|-------------------------------|---|---|---|--|---------------|---|
| Tourism Offer and Seasonality | Tourist profile: top-rated sources of information | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Tourist offices, tourist brochures, blogs and websites | Travel guides, websites and family and friends. | | |
| | Tourist Profile: trip arrangement | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | 63.4% of tourists say they organised their trip less than a week in advance, 23.9% organised it between 7 and 15 days in advance and 12.8% planned it one or no day in advance. | 49.10% of tourists say they organised their trip more than a month in advance, with 36.40% organising it between a week and a month in advance and 14.50% planning it less than a week in advance. | | |
| | Tourist profile: average budget | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | €1,123.27 | €903.75 | | |
| | Tourist profile: average daily spend | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | €131.92 | €85.43 | | |
| | Seasonal factors | INE | These are not annual data | These are not annual data | | Value calculated from the variables (overnight stays and places) for apartments and hotels. |
| | Max/min ratio | INE | These are not annual data | These are not annual data | | Value calculated from the variables (overnight stays and places) for apartments and hotels |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|---------------|--|---|--|---|---------------|--------------------|
| Accessibility | Existence of regulations and rules on the accessibility of places, facilities and services for visitors. | Accessible Tourism Plan for Malaga. Department of Tourism and Promotion of the City, Department of Social Rights, Diversity, Equality and Accessibility | Yes | Yes | | Statistical report |
| | Data on the extent/proportion of sites and facilities for visitors that are accessible. | | | | | |
| | Is there a programme/activities/approach by the tourism authority to improve accessibility for people with diverse access needs? | Head of the Accessibility Section of the Department of Social Affairs | Yes. Accessible Tourism Plan for Malaga | Yes. Accessible Tourism Plan for Malaga | | Qualitative data |
| | Accessibility information included in destination communications as a whole | Head of the Accessibility Section of the Department of Social Affairs | Yes | | | Qualitative data |
| | No. of tourism companies with accessibility certification (by sub-sector) | | | | | |
| | Number of listings with some level of accessibility | Expedia and Booking | Consulted in (2023) Expedia (hotels with accessible rooms): 5 Booking (hotels with wheelchair-friendly bathrooms): 70 Booking (audio guide and Braille visual support): 3 | | | |
| | Top attractions in the city with some level of accessibility | Accessible Tourism Plan for Malaga. Department of Tourism and Promotion of the City, Department of Social Rights, Diversity, Equality and Accessibility | Accessible monuments: 4 Beaches: 8 | | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|---------------|--|---|--|------------|---------------|--|
| Accessibility | Number of public buildings (visitor centres, museums, art galleries) with some level of accessibility | Accessible Tourism Plan for Malaga. Department of Tourism and Promotion of the City, Department of Social Rights, Diversity, Equality and Accessibility | Accessible museums: 9 | | | |
| | No. of accessible products and itineraries available (and change over time) | Accessible Tourism Plan for Malaga. Department of Tourism and Promotion of the City, Department of Social Rights, Diversity, Equality and Accessibility | 6 accessible routes | | | There is no information about changes over time. |
| | Accessible transport (taxi, buses, metro) | Accessible Tourism Plan for Malaga. Department of Tourism and Promotion of the City, Department of Social Rights, Diversity, Equality and Accessibility | Taxis: 88 accessible vehicle licences (6% of taxi licences in the city) The Metro Service has the accessibility certification accredited by AENOR-UNE 170001-2: 2007 Some EMT bus company measures: 65% of stops have voiced diode panels. Between 80 and 85% incorporate an augmented reality and geographic information system and 10% present information in Braille. | | | |
| | Number of companies offering specific experiences with guides trained for people with different access needs | | | | | There is information on targeted municipal programmes that are supported by associations to carry out this type of visit, but aimed at residents. No information for tourists. |
| | Digital accessibility | GeoPortal, City Council Website service | GeoPortal, a service on the City Council's website, among other functions, geolocates parking spaces reserved for people with reduced mobility, inclusive taxi ranks and other resources under the search criteria "Accessible Equipment". | | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|-------------------|--|---|---|--|---------------|---|
| Economic benefits | Tourism value (multiplier effect) | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | 1,48 | 1,52 | | |
| | Average daily expenditure (EUR) | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Tourists: 131.92 Day-trippers: 154.45 | Tourists: 85.43 Day-trippers: 83.84 | | Counted for both tourists and day-trippers |
| | Average visitor travel budget | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Budget: 1,123.97 | Budget: 903.75 | | |
| | Total economic impact (both direct and indirect) | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Value (millions) Total: 4,704.2339 Direct: 3,115.38669 Indirect: 1,588.84721 | Value (millions) Total: 3162.00007 Direct: 2094.039781 Indirect: 1067.96028847 | | |
| | Rentabilidad Hotelera – RevPar & ADR (& variación anual) | INE.Hotel Occupancy Survey | 87.44 | 50,46 | | This report includes the RevPAR. It was decided to include the ADR in the Offer report. |
| | Total revenue generated by tourism | X | | | | X |
| | Tourism's contribution to the local GDP (%) | X | | | | X |
| | Revenue from permits, licences or business concessions | CIEDES from the Department of Commerce, Public Road and Markets, Malaga City Council | Trade licences (food and non-food): 759 Hospitality: 463 Hotels: 37 Leisure: 166 | Trade licences (food and non-food): 846 Hospitality: 566 Hotels: 46 Leisure: 56 | | The source provides information on the number of licences, but no revenue. Pending incorporation in future reports. |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|-------------------|---|---|--|--|---------------|--|
| Economic benefits | Income from tourist pillars | GESTRISAM. Manager. Tax Management. | Data 2023 Airport facilities: 10,173,022.45 Hotel facilities: 2,064,093.78 | | | The property tax paid by airport and hotels is obtained |
| | Total annual expenditure on tourism | IATUR. Dashboard of General Indicators of Andalusia. Costs | | Costs/inhab. on tourism: 37.75 Costs/inhab. on culture: 75.01 Costs/inhab. on trade: 7.83 Costs/inhab. on heritage: 2.51 Total costs/inhabitant: 1227.72 | | Costs/inhab. on culture, costs/inhab on tourism, costs/inhab on trade, costs/inhab on heritage and total costs/inhab are collected |
| | Annual tourism costs as % of total tourism revenues | X | | | | X |
| Employment | Total employment | CIEDES and LFS | Employment (annual average) in thousands: Total: 202,225 Men: 109,575 Women: 92,675 | Employment (annual average) in thousands: Total: 199,625 Men: 101,875 Women: 97.7 | | |
| | Total tourism employment (by sub-sector and annual variation) | Costa del Sol Tourism and Planning, with Social Security data | Restaurants and catering: 22,166 Tourism transport: 10,355 Leisure activities: 4,887 Accommodation: 3,625 Rent a car: 1,062 TAs (travel agents) and TOs (tour operators): 817 | Restaurants and catering: 19,917 Tourism transport: 8,788 Leisure activities: 4,377 Accommodation: 2,817 Rent a car: 835 TAs and TOs: 776 | | Calculated from the distribution of Social Security affiliations in the tourism industry in Malaga by branch |
| | Relationship between tourism employment and total employment | SEPE | Contratos núcleo actividad turística: 51.938 Contratos Total de la economía ciudad de Málaga: 294.815 | Restauración: 19.917 Transporte turístico: 8.788 Actividades ocio: 4.377 Alojamiento: 2.817 Rent a car: 835 AAVV y TTOO: 776 | | A series of contracts have been identified in a clearly defined subset of tourism industry activities, which we have labelled as core tourism activity. This consists of the activities included in hospitality: accommodation services (division 55) and catering services (division 56) and activities of and related to travel agencies and tour operators (division 79). |
| | Total unemployment | CIEDES and EPA | q1: 50.2 q2: 50.4 q3: 46.1 q4: 61.2 | q121: 48.3 q221: 46.9 q321: 50.9 q421: 53.0 | | Data by quarter |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|---------------|---|--|--|--|---------------|--|
| Employment | Tourism part-time/full-time employment ratio | SEPE | 54%: temporary contracts 46% permanent contracts | | | A series of contracts have been identified in a clearly defined subset of tourism industry activities, which we have labelled as core tourism activity. This consists of the activities included in hospitality: accommodation services (division 55) and catering services (division 56) and activities of and related to travel agencies and tour operators (division 79). |
| | Ratio men/women employed in tourism | SEPE | Women's contracts: 27,813 Men's contracts: 24,125 | Women's contracts: 24,192 Men's contracts: 22,640 | | A series of contracts have been identified in a clearly defined subset of tourism industry activities, which we have labelled as core tourism activity. This consists of the activities included in hospitality: accommodation services (division 55) and catering services (division 56) and activities of and related to travel agencies and tour operators (division 79). |
| | Average tourism salary (by sub-sector) | X | | | | X |
| | Total number of people employed in the hotel sector and annual variation | Hotel occupancy survey,INE | Staff employed (annual average): 2,158 | Staff employed (annual average): 1,502 | | |
| | Total number of people employed in holiday apartments | Holiday Apartment Occupancy Survey,INE | Staff employed (annual average): 310 | Staff employed (annual average): 262 | | |
| | Seasonality in tourist employment (hotels and apartments). Seasonal factors | INE | These are not annual data | These are not annual data | | Value calculated from the personnel variables used in hotel establishments and holiday apartments |
| | Seasonality in tourist employment (hotels and apartments). Max/min ratio | INE | These are not annual data | These are not annual data | | Value calculated from the personnel variables used in hotel establishments and holiday apartments |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|---------------|--|---|--|--|---|--|
| Mobility | Total passengers arrived - airport | AENA | 18,398,992 | 8,874,635 | | |
| | No. of passengers arriving at the airport (international / domestic) | AENA | National: 3,322,393 International: 15,076,599 | National: 2,020,783 International: 6,821,695 | | |
| | Total number of airport connections (int./domestic) | AENA | Connections: 144 destinations International routes: 221 Domestic routes: 35 | | | |
| | Total revenue generated by airport | GESTRISAM. Manager. Tax Management. | Data 2023 Airport facilities: 10,173,022.45 | | | AIRPORT property tax |
| | Total number of airport employees (full-time/part-time; and gender) | X | | | | X |
| | Total number of cruise ships arriving | Costa del Sol Tourism Observatory | 342.016 | 118.305 | | |
| | Total cruise ships per month/year (int./domestic) | X | | | | X |
| | Average spending of cruise passengers | X | | | | X |
| | Total number of train passengers (by origin of top 3) | RENFE and Costa del Sol Tourism Observatory | Malaga - Madrid: 918,147 Seville - Cordoba - Malaga: 886,500 Malaga - Granada: 103,500 | Malaga - Madrid: 630,597 | | No data is obtained from the top 3. Of the top 3, only Madrid is included. Information about the Seville-Cordoba route is included |
| | Urban mobility bus and metro | OMAU | | | Bus passengers (2019): 39,570,000 Metro passengers (2019): 6,700,279 | |
| | Distribution by percentage of means of transport used to reach Malaga 2022 | Costa del Sol Tourism Observatory | Plane: 63.88% Train: 11.63% Own vehicle: 9.92% Coach: 8.84% | They mainly used the plane (47.80%) and their own vehicle (32.20%) to reach the city and, in third place, coach (7.20%).. | | |
| | Most used means of transport to get around Malaga | Costa del Sol Tourism Observatory | Among the means of transport that tourists used in the city are their own vehicle (27.04%), taxi (23.35%) and rented vehicle (22.96%). | Among the means of transport that tourists used in the city are their own vehicle (32.63%), rented vehicle (16.78%) and taxi (10.49%). | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|---------------|---|---|--|--|---------------|--|
| Mobility | % of tourists that visit other municipalities during a visit to Malaga vs visiting only the city | Costa del Sol Tourism Observatory | Exclusively visit the city (80.15%) Travel to other cities (51.35%) | Exclusively visit the city (72.8%) Travel to other cities (45.6%) | | |
| | Passengers by age group - airport | AENA | <15: 5% 15-29: 30% 30-49: 39% 50-64: 18% >64: 8 % | 18-29: 42,5% 30-49: 41,1% 50-64: 10% >64: 6,5 % | | |
| Governance | Amount of funding available per year for tourism development. | | | | | |
| | % of area subject to control (density, design, etc.). | | | | | |
| | % of area used for tourism purposes, for buildings | | | | | |
| | % of construction proposals that are subject to an environmental review or undergo an environmental impact assessment (EIA) | | | | | |
| | Does the organisation have employees responsible for sustainability (e.g., Sustainability Officer, Sustainability Manager)? | Department of Tourism and Promotion of the City of Malaga and Department of Environmental Sustainability. | Yes | | | |
| | No. and percentage of tourism companies with sustainability certification (by sub-sector) | SICTED | | | | A graph will be obtained as an image. In the process of requesting and extracting more detailed data |
| | Communicating sustainability issues to tourism-related businesses (media, meetings, direct contact, etc.). | Department of Tourism and Promotion of the City | Yes. Tourism Forum, Environmental Advisory Centre. | | | |
| | Sustainability support and advice to tourism-related businesses, available and promoted | Department of Tourism and Promotion of the City | Yes. Environmental Advisory Centre | | | |
| | Level of connection and exchange with provincial tourism authorities. | Department of Tourism and Promotion of the City | Yes | | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|---------------|--|---|------------------|------------|---------------|---|
| Gobernanza | Linking the local tourism development plan with the provincial plan. | Department of Tourism and Promotion of the City | Yes | | | |
| | There are specific quantifiable socio-economic, cultural and environmental indicators and objectives identified. | Department of Tourism and Promotion of the City | Yes | | | |
| | Measurement and monitoring of identified indicators, with results recorded and published at least annually | Department of Tourism and Promotion of the City | Yes | | | |
| | Written evidence of follow-up and notification of actions and results | Department of Tourism and Promotion of the City | Yes | | | |
| | Is there a documented risk reduction, crisis management and emergency response plan for tourism at the destination? | Department of Tourism and Promotion of the City | Yes. Alicia Plan | | | |
| | Are there specific regulations covering the rental and operation of properties for tourism, with proof of their application and compliance? | Department of Tourism and Promotion of the City | Yes | | | |
| | Existence of a land use or development planning process that includes tourism (can be classified by the degree to which it expressly covers tourism) | Department of Tourism and Promotion of the City | Yes | | | |
| | Existence of specific criteria for the control of tourism development in the plans, such as maximum number of hotels/ beds, density standards, design, environmental and social controls, etc. | Department of Tourism and Promotion of the City | No | | | It is mentioned that there are no limitations |
| | The destination and the main tourism stakeholders are signatories to the Code of Conduct for the Protection of Children against Sexual Exploitation in the Travel and Tourism Industry | Department of Tourism and Promotion of the City | Yes | | | |
| | Tourist data platform available for destination stakeholders | Department of Tourism and Promotion of the City | Yes | | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|--------------------|--|--|---|--|---------------|--|
| Local satisfaction | Total population (by neighbourhood; demographics and evolution over time) | Malaga City Council. Gestrisam reports | 580,032 | 579,984 | | |
| | Land and housing prices (and evolution over time) | CIEDES | Average price per square meter of urban land (euros/m2): 1,094 Total number of land transactions: 1,133 | Average price per square meter of urban land (euros/m2): 921 Total number of land transactions: 1,393 | | |
| | Information on regular monitoring of local satisfaction | CASR study | Degree of satisfaction with living in Malaga: 7.7 | Degree of satisfaction with living in Malaga: 7.61 | | A report is published annually |
| | Local satisfaction with tourism, based on resident questionnaire and/or tourist perception report | OMNIBUS report. Provided by Head of Quality, Department of Tourism and Promotion of the City | % Negative perception by Districts: D1: 18.26 D2: 11.87 D3: 9.9 D4: 12.5 D5: 7.13 D6: 14.06 D7: 16.05 D8: 39.47 D9: 0 D10: 0 D11: 7.37 | | | It is not known whether there will be a possible update to the report. Differentiated by neighbourhood |
| | Existence of a regional/local tourism plan approved by stakeholders | Department of Tourism and Promotion of the City | Yes | | | |
| | Comprehensive engagement with local residents throughout the development of the regional strategy | Department of Tourism and Promotion of the City | Yes | | | |
| | Tourist information, education and training programme for residents. Residents who understand what constitutes a sustainable tourism practice. | Department of Tourism and Promotion of the City. CASR study. | No training programme. Questions are asked about sustainability issues. | No training programme. Questions are asked about sustainability issues | | The surveys include questions on aspects related to sustainability, to measure satisfaction and the level of understanding |
| | Registered signs of dissatisfaction with tourism by residents | OMNIBUS report. Provided by Head of Quality, Department of Tourism and Promotion of the City | 15.17% of the population perceives negative effects, particularly with regard to the ability of residents to enjoy their own city and the rise in prices. | | | It is not known whether there will be a possible update to the report. Differentiated by neighbourhood. |
| | Level of residents' understanding of tourism and its impacts | CISA study and OMNIBUS report | Yes, residents' perception of strategies to optimise tourism is measured. | Yes, residents' perception of strategies to optimise tourism is measured. | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|--------------------|---|---|--|------------|---------------|--|
| Local satisfaction | Surveys and feedback include visitor reaction to sustainability issues | Department of Tourism and Promotion of the City of Malaga | Yes | | | |
| | Tourist satisfaction - average grade (mx. 10 points) | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | As expected: 4.29% Very positive: 62.98% Positive: 32.73% | | | |
| | Highest rated cultural offer in the city | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Museum offer: 8.94 Events offer: 8.93 Monument offer: 8.85 | | | |
| | % tourists visiting for the first time and % visiting more than once | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | More than 10 times: 1.67% 6-10 times: 7.67% 3-5 times: 19.67% Second time: 12.00% First time: 59.00% | | | |
| | Intention to return (% of tourists) | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Maybe / I might come back: 27.60% Won't come back: 1.62% Not sure if will return: 0.65% Will come back: 70.13 | | | The data was collected earlier, but is collected in a comparable manner from the date indicated. |
| | Intent to recommend to others (% of tourists) | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Won't recommend: 0.75% May recommend: 5.97% Will recommend: 93.28% | | | The data was collected earlier, but is collected in a comparable manner from the date indicated. |
| | Programmes exist and are promoted for visitors to support local community and sustainability initiatives. | Section Head of Biodiversity and Environmental Education | Yes | | | |
| | Employment status of the tourist | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Retired: 6.09% Student: 5.64% Unemployed: 4.51% Employed: 83.07% Housework: 0.68% | | | The data was collected earlier, but is collected in a comparable manner from the date indicated. |
| | Age and gender distribution of visitors to city of Malaga | Department of Tourism and Promotion of the City of Malaga. Malaga Tourism Observatory | Aged 18 to 29: 15.53% Aged 30 to 39: 33.50% Aged 40 to 49: 25.49% Aged 50 to 59: 16.02% Aged 60 to 64: 4.37% Average age: 41.37 Women: 56.88% Men: 43.12% | | | The data was collected earlier, but is collected in a comparable manner from the date indicated. |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|----------------|--|--|---|--|---|--|
| Climate change | The destination's carbon footprint | OMAU | | | 2020: 1,955,389 | Total CO2 produced due to the energy consumption of the city & municipality |
| | City's climate objective(s) Alicia Plan | Plan Alicia | Annual emissions reduction of 7.3% until 2030. Reaching carbon neutral by 2050. | Annual emissions reduction of 7.3% until 2030. Reaching carbon neutral by 2050. | | |
| | Does the city and municipality currently have a climate action plan/strategy/roadmap? | Alicia Plan | Yes | Yes | | |
| | Is the city committed to some formal climate action framework? | Alicia Plan | Yes | Yes | | |
| | Does your organisation disclose emissions information from its tourism operations? | Alicia and OMAU Plan | | | Commercial buildings (2020): 86,725 Private and commercial transport (2020): 632,855 | Emissions from tertiary buildings and private and commercial transport |
| | Do DMOs/local authorities engage with tourism businesses on climate change and decarbonisation efforts? | Head of the Pollution Control and Circular Economy Service | Yes | | | |
| | No. of partner organisations with which the tourism authority collaborates in the area of climate change | Hosteleria#Por el clima (Hospitality#for the climate) | - Association of Hoteliers of Malaga - Hotel Málaga Premium. - EMT - Metro Málaga - La Concepción Historical Botanical Garden | | | |
| | Existing guidance and training for tourism businesses on climate change and potential actions | Section Head of Biodiversity and Environmental Education | Yes | | | The city has a body called the Environmental Advisory Centre |
| | No. of extreme weather events: floods; fires, droughts and landslides, etc. | Public Participation Delegate (National Police) | | Burned vegetation area: 0.97 | | There are no data on these phenomena. Alertcops is mentioned as an application that issues alerts about these circumstances. |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|-------------------|--|--|---|------------|--------------------|---|
| Climate change | Degree to which key tourist zones are covered by contingency or emergency plans (existence of plan, % of area included) | Alicia Plan | Yes | | | The zones of Malaga at risk are shown on a map, using tourist indicators to calculate the risk. The percentage area of tourist zones in emergency situations is not available |
| | A climate risk assessment, covering current and future risks, conducted and made available to the public | Alicia Plan | Yes | | | |
| | Is there support and guidance for accommodation and restaurants in reducing single-use plastic products (SUPPS)? | Section Head of Biodiversity and Environmental Education | Yes | | | |
| | Emissions from electricity consumption in the commercial sector | Ministry for Sustainability, Environment and Blue Economy. Carbon Footprint of the municipalities of Andalusia | | | (2019): 192,430.29 | |
| | % of key species considered vulnerable to climate change | OMAU | The Montes de Málaga has 10 vertebrates under threat and 7 flora species; and the Paraje Natural de la Desembocadura del Guadalhorce has 55 vertebrates under threat. | | | |
| | % coverage of natural areas in the destination's territory | OMAU | Natural parks: 12.1% Natural areas: 0.21% | | | |
| | Regulations, guidelines and zoning for development and tourism activities take into account the consequences of climate change | Head of the Pollution Control and Circular Economy Service | Yes | | | |
| | The destination establishes Low Emission Zones and is concerned with the control and measurement of air quality | Head of the Pollution Control and Circular Economy Service | Yes | | | |
| | Do you engage your visitors in low-carbon initiatives? | Section Head of Biodiversity and Environmental Education | Yes | | | Carbon footprint compensation, sustainable productions and sustainable events are encouraged. |
| Energy management | Are energy consumption objectives identified and defined? | OMAU | Targets (2050): - Energy consumption per inhabitant: < 0.78 (toe). - % of renewable energy consumption over total final energy: >15% | | | |
| | Are energy consumption targets published and promoted? | OMAU | Yes | | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|------------------------|--|--|---|---|-------------------|---|
| Energy management | Programme to increase energy efficiency - for example, promoting and supporting insulation | Environmental Awareness Programme. Malaga City Council | Yes | | | |
| | Investment in renewable energy and percentage of total supply/consumption | OMAU | | Total renewable energy production (toe): 9,639 | | |
| | Support and incentives for energy control and reduction by companies | Department of Environmental Sustainability. | Yes | | | |
| | Per capita energy consumption from all sources (global and by tourism sector - per person per day) Note: can also be used as an indicator derived from energy use per resident in relation to energy use per tourist | OMAU and the Department of Urban Transformation and Digitalisation | | Total final energy consumption per inhabitant (toe): 1.33 | | Global consumption is obtained from this source. For tourism, other indicators are included |
| | Number of companies participating in energy conservation programmes or implementing energy saving policies and techniques | Environmental Advisory Centre. Department of Environmental Sustainability. | 1,069 | | | Companies that obtain an environmental quality certificate |
| | % of energy consumption from renewable resources (in destinations, establishments) | OMAU and the Department of Urban Transformation and Digitalisation | | | | Only the data for destination exists. It is not differentiated by establishment |
| | Number of establishments (e.g., hotels) using renewable sources, generating their own energy | X | | | | X |
| | Electricity consumption in the trade/services sector | SIMA | 610,347.56537 | 600,864.601629 | | |
| | Consumption by commercial buildings | ALICIA PLAN | | | (2017): 739,207 | |
| | Private and commercial traffic consumption | ALICIA PLAN | | | (2017): 3,018,300 | |
| | Photovoltaic energy | Department of Urban Transformation and Digitalisation | 58 installations Energy production 2,474 MWh Reduction of 1,289 tonnes of carbon dioxide per year | | | |
| Solid waste management | Total amount of waste collected | OMAU | | 68 T/day | (2020): 106,243 | |
| | Volume of waste produced by the destination (tonnes) pa / Person years pa (per month) | OMAU | | 726 T/day 1.28 kg/person/day | | |
| | Waste disposed of by different methods (specify, for example, incinerated, landfilled, etc.) | OMAU | | Processed: 47% Incinerated: 0% Landfill: 53% | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|------------------------|--|--|---|---|-------------------|---|
| Energy management | Programme to increase energy efficiency - for example, promoting and supporting insulation | Environmental Awareness Programme. Malaga City Council | Yes | | | |
| | Investment in renewable energy and percentage of total supply/consumption | OMAU | | Total renewable energy production (toe): 9,639 | | |
| | Support and incentives for energy control and reduction by companies | Department of Environmental Sustainability. | Yes | | | |
| | Per capita energy consumption from all sources (global and by tourism sector - per person per day) Note: can also be used as an indicator derived from energy use per resident in relation to energy use per tourist | OMAU and the Department of Urban Transformation and Digitalisation | | Total final energy consumption per inhabitant (toe): 1.33 | | Global consumption is obtained from this source. For tourism, other indicators are included |
| | Number of companies participating in energy conservation programmes or implementing energy saving policies and techniques | Environmental Advisory Centre. Department of Environmental Sustainability. | 1,069 | | | Companies that obtain an environmental quality certificate |
| | % of energy consumption from renewable resources (in destinations, establishments) | OMAU and the Department of Urban Transformation and Digitalisation | | | | Only the data for destination exists. It is not differentiated by establishment |
| | Number of establishments (e.g., hotels) using renewable sources, generating their own energy | X | | | | X |
| | Electricity consumption in the trade/services sector | SIMA | 610,347.56537 | 600,864.601629 | | |
| | Consumption by commercial buildings | ALICIA PLAN | | | (2017): 739,207 | |
| | Private and commercial traffic consumption | ALICIA PLAN | | | (2017): 3,018,300 | |
| | Photovoltaic energy | Department of Urban Transformation and Digitalisation | 58 installations Energy production 2,474 MWh Reduction of 1,289 tonnes of carbon dioxide per year | | | |
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| | Volume of waste produced by the destination (tonnes) pa / Person years pa (per month) | OMAU | | 726 T/day 1.28 kg/person/day | | |
| | Waste disposed of by different methods (specify, for example, incinerated, landfilled, etc.) | OMAU | | Processed: 47% Incinerated: 0% Landfill: 53% | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|------------------------|---|---|---|------------|---|---|
| Solid waste management | Waste attributable (per month or season) to tourism | CIEDES AND OMAU | | | | Estimated from waste collected on the beach and in the city centre |
| | Volume of waste recycled (m3) /Total volume of waste (m3) (specify by different types) | OMAU | Tons treated as compost: 103,480 Composition of SUW: Organic: 33% Paper and cardboard: 15% Glass: 5% Plastics: 14% Ferrous: 3% Non-ferrous: 1% Other: 29% | | | The volume in that unit of measurement is not collected. The % of waste that receives some type of treatment (recycling or transformation) or compost is obtained. Also the composition of Solid Urban Waste. |
| | Number of tourist establishments collecting waste separately, waste collection capacity separated from local residents | | | | | |
| | Number of tourist establishments recycling their own waste (e.g., composting) | | | | | |
| | Percentage of destination zone (especially in urban zones) covered by solid waste collection services | | | | | |
| | Percentage of tourist establishments covered by waste collection programmes | | | | | |
| Water management | Water use: (total volume consumed and litres per tourist per day) | OMAU and Department of Operational Services | | | Total water consumption (2020): 159 Domestic consumption (2020): 124 | Per tourist no. Water consumption in Alcazaba and Gibralfaro is included |
| | Water savings (% reduced, recaptured or recycled) | OMAU | Target (2050) Total water consumption: 125 Domestic consumption: 100 | | | Energy saving targets |
| | Number of establishments participating in water conservation programmes, implementing water conservation policies and techniques, recycling treated wastewater (e.g., for irrigation purposes, hotels using water-saving showerheads, flushing systems, advising and incentivising guests on water savings, water-related issues, reuse of towels). | | | | | An example of best practice in hotels is included in the wastewater management report |
| | No. of shortage incidents per year or number of days per year where there is a shortage of supply | | | | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|-----------------------|---|--|---|------------|--|---|
| Water management | Water price per litre or cubic metre | FACUA | Average consumption of 9 m3: €12.51 Average consumption of 13 m3: €20.83 | | | |
| | Existence of a water quality control programme? | OMAU | Yes | Yes | | |
| | Existence of data and reports on water quality? | OMAU | Yes | Yes | The quality of water for consumption is controlled by Malaga City Council through EMASA, obtaining the rating of Satisfactory situation in the period (2015-2020). This rating means that the water was rated as potable in at least 95% of the tests. | |
| | Monitoring of bathing water, with certification and identification of the places that meet the established standards? | OMAU | Yes | Yes | The bathing waters of the city of Malaga obtain the highest rating (excellent) in the period 2015-2020. The following are identified as bathing zones with the categorisation of excellent: Baños del Carmen Beach, Campo de Golf San Julián Beach, Fábrica de Cemento Beach, El Candado Beach, El Dedo Beach, El Palo Beach, Guadalmar Beach, La Araña Beach, La Caleta Beach, La Malagueta Beach, Pedregalejo Las Acacias Beach, Peñón del Cuervo Beach, Sacaba Beach, San Andrés Beach. | |
| Wastewater management | Percentage of wastewater or grey water recycled | OMAU | | | Total water treated (2020): 64,535,871 | |
| | Percentage of wastewater from the destination receiving treatment | OMAU | | | Secondary treatment (2020): 176,395 Tertiary treatment (2020): 4,056 | |
| | Percentage of treated wastewater that is recycled (e.g., for irrigation) | OMAU | | | Percentage of tertiary/secondary treated water (2020): 2.30% Tertiary treatment capacity (2020): 21.58% | |
| | Percentage of tourist establishments (or accommodation) with (adequate) treatment systems | | | | | Some best practices for hotels are mentioned |
| | Percentage of destination served by storm water systems (which separate wastewater from runoff and surface drainage) | Alicia Plan and Malaga Sustainable City Report | 55% | | | |
| | Effluent pollution | | | | | Not available. Emissions generated by wastewater treatment are included |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|---|---|--|--|------------|---------------|----------|
| Environmental education | Does the destination have environmental awareness programmes for citizens? | Municipal Environmental Awareness Programme. Malaga, how do I love you!? | Yes | | | |
| | Does the destination have environmental itineraries? | Municipal Environmental Awareness Programme. Malaga, how do I love you!? | Yes | | | |
| | Support and advice on sustainability to companies | Department of Tourism and Promotion of the City | Yes | | | |
| | Is there a roadmap for the development of sustainable events? | Municipal Environmental Awareness Programme. Malaga, how do I love you!? | Yes | | | |
| | Does the destination carry out programmes to raise awareness of the climate crisis? | Municipal Environmental Awareness Programme. Malaga, how do I love you!? | Yes | | | |
| Sustainable audiovisual production | Sustainable Filming Guide | Malaga Film Office | Yes | | | |
| | Eco-friendly suppliers | Malaga Film Office | Yes | | | |
| | Total audiovisual projects | Malaga Film Office | Audiovisual projects: 576 Projects carried out: 257 Economic impact (millions): 14.7 | | | |
| | Measuring the carbon footprint of audiovisual productions | Malaga Film Office | Yes | | | |
| | Offers information on recycling centres closest to the filming location | Malaga Film Office | Yes | | | |
| | Sustainable Production Stamp | Malaga Film Office | Sustainable production stamps awarded: 9 | | | |

| Thematic area | Indicator | Source | Value 2022 | Value 2021 | Value (other) | Comments |
|--------------------|--|--|--|------------|---------------|----------|
| Sustainable events | There are programmes and good practices for sustainable events | Municipal Environmental Awareness Programme. Malaga, how do I love you!? | Yes | | | |
| | There are regulations for sustainable events | Municipal Environmental Awareness Programme. Malaga, how do I love you!? | Yes | | | |
| | Sustainable Events Stamp | Municipal Environmental Awareness Programme. Malaga, how do I love you!? | Yes | | | |
| | Sustainable events held annually | Municipal Environmental Awareness Programme. Malaga, how do I love you!? | 2023): 79 (2022): 13 | 19 | | |
| Health | Existence of regulations affecting health at the destination | Drafted in-house | Yes | | | |
| | COVID-19 situation in Malaga | IECA. SIMA | Confirmed cases: 105,302 Recovered: 103,176 Deceased: 927 | | | |
| | Accessibility of hospitals and health facilities | IECA. SIMA | Data 2023 Health centres 26 Local clinics 2 Hospitals 12 | | | |
| | Medidas de primeros auxilios en la ciudad de Málaga | IECA. SIMA | Data 2023 Inhabitants/pharmacy 2123 Pharmacies 272 Defibrillators 681 | | | |
| | Skin Cancer Sun Protection and Prevention Project. | Costa del Sol Health Agency and Soludable | Yes | | | |
| | There is a plan to encourage healthy habits in the destination | Malaga Healthy City Plan | Yes | | | |
| | Food health: gluten-free establishments | Malaga Gluten-free Network | Establishments adhering to Malaga Gluten-free Network 69 | | | |
| | Does the municipality have a health and hygiene complaints department? | Malaga City Council | Yes | | | |



06.

Keys to participation process

Local Working Groups: The Expert Roundtables

06.1.

First of all, it is worth mentioning that the preparation of the reports is the result of a process of openness to knowledge, with participation and collaborative learning as key elements.

Collaboration between the stakeholders responsible for the management of tourism and the city itself has been essential for the preparation of these reports. For example, several meetings with private and public stakeholders and more than 30 interviews with different stakeholders took place.

The Annex includes some of the stakeholders involved who provided us with, or plan to provide information that feeds into the reports, as well as constituting a list of contacts for the updating of the indicators referring to each of the thematic areas.

One of the requirements for all new tourism observatories is to organise a stakeholders' workshop within the first year of establishment which should include all stakeholders of the destination, including the members of the local working group. In this context, the CIEDES Foundation has been in charge of coordinating, organising and facilitating the Experts Roundtables prior to the holding of the stakeholder workshop, always following the recommendations of UN Tourism and under the supervision of the working group designated by the Department of Tourism.

The workshop participants were invited to:

- Discuss the findings of the study or preliminary report.
- Reflect on and accept the areas of dissatisfaction and indicators to be monitored by the observatory.
- Identify the most important needs, gaps and sources of information.
- Clearly define the roles and responsibilities of stakeholders such as the frequency of meetings between said stakeholders.
- Agree on the Observatory Implementation Plan.

Therefore, the final objective pursued with the establishment of the official local working group was to ensure a continuous commitment to constant, regular and timely monitoring efforts. This group consisted of representatives from all relevant stakeholder groups in the destination and was officially formed in this preparation phase to guide the monitoring process of the observatory over time.

The main tasks carried out by CIEDES were:

- Launch meeting and basic structuring of the observatory with the stakeholder committee: convening of stakeholders, as well as the coordination of the working day.
- Maintain contact with those responsible for preparing the reports that will serve as supporting documentation for the expert panels.
- Conduct 4 Expert Roundtables on the technical blocks related to the thematic areas: Economic Sustainability, Social Sustainability, Environmental Sustainability and Governance. Convene the Roundtables, coordinate the attendees and the speakers, communicate the call, prepare the necessary support material for the realisation of the workshops, coordinate the technical staff, and produce the deliverables of the process and conclusions from the stakeholders' workshop. The different areas of research linked to the sustainability challenges of the destination were the main topics of discussion. Relevant stakeholders linked to each of them were invited from both the public and private sectors.



Furthermore, throughout the process of organisation and coordination for the holding of the technical expert panels, the CIEDES Foundation has been in communication with the personnel assigned by the Department of Tourism to carry out this contract. To this end, online meetings were held periodically, to determine both the meeting format, the necessary material, to develop the database with the agreement of the Department of Tourism, etc.

When convening the expert panels The CIEDES Foundation has always followed the guidelines set by Un Tourism for the implementation of tourism observatories, in this sense the organisation of the panels was organised based on four thematic blocks: economy, social, environment and governance. Within these thematic blocks, different areas of study were discussed, for which the University of Malaga was in charge of preparing the previous reports, according to the methodology that CIEDES designed and provided, which were used as the basis of the dialogue for the panel's meetings.

The expert panels were held on 8 and 9 November, in the afternoon at the headquarters of the CIEDES Foundation. The technical teams of the Department of Tourism and CIEDES Foundation met prior to this on 2 October, 18 October and 7 November. Those meetings determined the people who would be part of the technical panels, the methodology to be followed, and the coordination with the University of Malaga. All the documentation necessary for these meetings, as well as the information received afterwards by the participants, is available to the technicians in a drive folder shared between the Department of Tourism and CIEDES.

Below are the conclusions drawn from each of the expert panel meeting that were held (ECONOMY, ENVIRONMENT, SOCIAL and GOVERNANCE). To this end, the highlights and the challenges and best practices that are being carried out by each thematic panel are presented. In addition, evaluation and monitoring indicators are proposed that could be provided.



| | | | | |
|---------------|--------------------------------------|--|---|---|
| Economy Panel | Highlights | <ul style="list-style-type: none"> • Sporting events include many international runners. • Impact of passengers arriving by plane. • Saturation. • Tourism phobia: feeling overloaded. • Gentrification: involves giving the city to its citizens and not to vehicles. • Holiday accommodation help counter problems with seasonality: especially in the professional area. • Longest average stay of all types is in holiday apartments. • Stays from September to December increase, may be related to climate change (energy tourism, the Germans call it). • Increased bicycle use. • Mediterranean climate is demanding in summer and habits change. • The environmental awareness of the tourist improves if the awareness in the destination is high. • Tourists staying in holiday apartments are environmentally aware. • Malaga Film Office is conscious of sustainability. | Challenges | <ul style="list-style-type: none"> • Producing the information in more languages, but without losing identity. • Measuring the impact of the increase in the number of passengers arriving through the airport and port, due to the impact on sustainability (air quality). • Planning events and the zones where they take place. • Making a city for the people of Malaga, that's what attracts tourists. • Increasing green spaces and comfortable public zones. • Measuring capacity to receive cruise ships. • Maintaining the traditional trades of Malaga, as a tourist attraction. • Improving the accessibility of the destination. • Making an inventory of identity resources that can be used for tourism. (Identifying establishments, meals, characters, etc.). • Distributing tourism to other zones of the city to avoid the elimination of traditional trade. • Share catalogue of historical businesses with establishments (association). • Increasing the communication about tourism jobs. • Making new cycling routes for enjoying the city, not just as transport. • Fostering urban forest. • Promoting cycling connections between Malaga and Cala, Torremolinos and the Botanical Garden. • Promoting measures to reduce the use of plastics by residents and tourists (particularly on street markets). • Halting the elimination of paper for tourist information. • Increasing desalination. • Imposing some kind of tourist tax. • Protecting historical heritage so as not to lose identity (paid for by the tourism tax). • Controlling new licences and requiring quality and sustainability stamps. • Decentralising the location of productions. • Talking to District Boards to learn about shops with traditional character, which will be promoted through the AV industry |
| | Best practice/ Solutions in place | <ul style="list-style-type: none"> • Sustainability certification of holiday homes and apartments. • Dos and don'ts of sustainable attitudes. • Marketing platforms: they are starting to allow you to list whether your accommodation is sustainable. • Events and conferences are changed if their stay is more sustainable. • Traditional commerce campaigns. • Trade catalogue. • Neighbourhood tours. • 3 million project for the decentralisation of sustainable tourist routes. • European projects for connection with La Cala and Torremolinos. • Carbon footprint calculator for all tourists, which will include suggestions for compensating. • Cruise groups that are offering experiences in jábega (smack) and sampling espeto (sardine skewer). • Turismo Costa del Sol has a carbon meter for trips. • Hidralia's Waterverse project for the use of water data. | Indicators for monitoring and evaluation | <ul style="list-style-type: none"> • Sustainable events: Department of Environmental Sustainability. • Booking and Expedia: highlighting which elements of environmental impact the accommodation has addressed. • Use not only INE data, but use hotel data and data from other accommodation (Holiday Apartment association). • INE experimental statistics. • Holiday accommodation association. • Overall tourism survey for Andalusia. • Use the overnight stay and not the holiday property as a data point. • Bicycle use data and possibility of bike lanes in the city. • Measure the useful space for the pedestrian, not for bars or bicycles. • Measure the environmental impact of the airport and port: not only in Malaga but throughout the marine ecosystem. • Connect airport information with the City Council to give sustainable directions. • Association of Guides has no data. • Tourist Board: tourism big data. • Rubbish rate: artificial intelligence to identify waste type by establishment (it was done with a survey). • Fair: it is possible to have data on tourists who come with a very varied degree of disaggregation (in 2024 this will be for all events). |

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|--------------|--------------------------------------|--|---|--|
| Social Panel | Highlights | <ul style="list-style-type: none"> • The brake on the local community exerted by the exponential increase in tourism in the city. • The exponential increase in the cost of housing. • Good prior planning of socio-economic movements is required, in other words, the co-existence of holiday accommodation and local residents. Social sustainability, improve the coexistence between tourists and residents, and diversify the zones, the tourism offer. • The policy in Malaga has been one of mixed use. When a holiday property • is put on the market it should lose its condition as a residential property. There has been no change of use. If someone lives in it, it is residential, and if it's rented, it ceases to be housing and becomes a business. • The historic city centre aims to be a neighbourhood, projects and investments have been made that have not given the expected results, the concept of the centre as a neighbourhood has failed. • Neighbourhoods are created by people. You have to take into account what kind of profiles come to the city. The city is not only what is built; the city is the people who live in it. Therefore, it is necessary to take into account its mobility and accessibility. • Certain streets have been regenerated thanks to the renovation of buildings, but the policy should have been that of the coexistence of uses and not only intended for holiday accommodation. • The dissatisfaction of the citizen with traffic when sports and events are held in the centre. • Problems of coexistence between the visitor and the citizen, the combination is very difficult. | Challenges | <ul style="list-style-type: none"> • Increasing the number of women with disabilities in work and women in management positions. • Identifying the profiles that generate the most rejection, such as drunken tourism, because makes people feel insecure, especially women. • Working to regenerate spaces. • Promoting different tourism segments such as: luxury, MICE... The strategy is segmenting tourism, breaking down seasonality. Legacy in the city according to type of tourism. • Putting limitations in certain zones of the holiday accommodation sector. • Measuring perceptions of residents. The strategy for attracting tourists needs to be changed. A great city to live in is a great city to visit. • Accessible Tourism Plan, that reaches different zones of the city, that goes beyond the historic city centre. • Increasing and diversifying the visit to the city, so that not all tourism stays in the city centre. • Being able to measure the capacity of spending and sustainability in Malaga companies. • Encouraging the sale of local products. |
| | Best practice/ Solutions in place | <ul style="list-style-type: none"> • The prevention of skin cancer in Nordic tourists, a best practice aimed at health sustainability. • SOLUDABLE project, comprehensive project to promote healthy lifestyle habits related to sun exposure, from Ministry of Health. • Equality and work-life balance plans. Diversity in its broadest concept, LGTBI (municipal plan approved). • The National Police offers a service of attention in several languages, within the tourist service offices for both national and foreign tourists, especially focused on foreign tourists so that if any incident occurs it can communicate well in their language. • Mobile app that anyone can download and directly contact the national police or civil guard and a patrol car can be sent to them. It has geolocation for lost tourists. It has a chat function so they can talk to agents. To report a safety situation to anyone. They have distributed all the information and advertising in the main tourist sectors of the city, museums, hotels, airport, holiday accommodation... The important thing is the satisfaction of the tourist. • Safe tourism plan, for hotels and holiday accommodation. • Theft control campaign. Operation Sofía. More than 1000 complaints in SATE (Foreign Tourist Assistance Service). • The Department of Participation has modified and updated by-laws related to coexistence. • The Thyssen Museum has implemented a good practice of the raising awareness of visitors. • Design of new and integrated routes to create accessible shaded routes. • Climate shelters, maps of where you can take refuge from the heat. | Indicators for monitoring and evaluation | <ul style="list-style-type: none"> • Consular body, they have qualitative data with a very direct relationship with tourists. • Social sustainability, indicator system, worked with Un Tourism to see how to measure social sustainability, has to measure 5 points, visitor satisfaction, feeling of local communities (how citizens perceive the tourist influx), decent employment (working conditions of the tourism sector, what they're like), empowerment of women (no women managers in tourism), accessibility, and governance (how tourism relates to other agencies, tourism policy as it is perceived and how all departments connected to tourism relate). The document is in draft form. • Sustainable heritage, indicators to achieve certification. • Agrupación de Cultura Malaga has indicators of: Promotion of local fabric, events, audience that buy tickets online. • Citizen perception of tourism, qualitative and quantitative study. |

| | | | | |
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| Enviromental Panel | Highlights | <ul style="list-style-type: none">• In the city there is a considerable increase in municipal solid waste, motivated by the increase in tourism, all collected by the city council, but it needs to work to ensure that it is collected by those who generate it, such as the waste from business activities or from industrial estates.• Significant increase in holiday accommodation with the effort invested in renovation of holiday apartment buildings. The increase must be seen from al perspectives, because you can invest and renovate.• The Department of Tourism and Promotion of the City and Department of Environmental Sustainability: decentralisation of sustainable tourism.• Little capacity to obtain water for everyone.• Water, energy, food, ecosystems... are limited, you have to have a good sustainable tourism plan for the improvement and conservation of resources. | Challenges | <ul style="list-style-type: none">• Referencing what the tourism uses are, where they are located and thus be able to study the data and compare with the majority uses. With the aim of studying the data, analysing it and adjusting the impact of tourism.• Being a carbon neutral destination.• Open innovation procedure, prevention in face of the increase in the number of cruise passengers. Study how cruise passengers move to prevent crowding, move them to other places, and make the most of the economic impact, spreading spending throughout the city. It would be necessary not only to measure the economic impact of cruises, but also to measure their global impact at all levels of the city of Malaga.• Convert the port of Malaga into an electrified port.• Promote routes of experiences, less impact of people, less polluting and more interesting economically speaking for the city. Malaga has the capacity to be able to launch a most luxury package.• Working with distribution companies.• Creating a good system of indicators to have more data and have a more realistic view of what happens in the city.• Projecting scenarios about what we have, and projecting ideas that adapt quality to use. And at this time, when tourism is beginning to be aggressive and consuming a lot, we need awareness campaigns that are not only for citizens but also for tourists. If the city is able to withstand the load capacity that is already more than exceeded. |
| | Best practice/ Solutions in place | <ul style="list-style-type: none">• Electrification of the docks by 2030. Power that the cruisers need, and how it can be managed.• Green hydrogen.• Cruise ships treat waste and have desalination plants on board.• Destination Malaga as a destination for clean solar energy. Benarrabá, 500 inhabitants, and they have a project to generate enough energy for the entire municipality.• Community solar panels.• Vertical gardens, like the project created at the Mariposa Hotel. | Indicators for monitoring and evaluation | <ul style="list-style-type: none">• EMASA can provide information on both consumption and sanitation, and it is also cross-referenced with the census.• Study how to distinguish water use between registered residential homes and holiday accommodation.• A study of waste according to zones and socio-economic data to differentiate.• Useful green zone data is what is used in the European calculation. 15m2. The city's green cover. 30% capacity challenge 3, 30 and 300. |

| | | | | |
|------------------|--------------------------------------|--|---|--|
| Governance Panel | Highlights | <ul style="list-style-type: none"> Rental and accommodation price hikes. Demand has grown a lot and especially in the centre, it hasn't been possible to encourage tourists to decentralise. Visiting the Alcazaba isn't sustainable due to an excess of groups (the lift for older people doesn't work well). Older tourists have problems getting on and off buses and in the Alcazaba and Picasso Museum (accessibility). Foreign tourists are becoming aware and a few actions are being taken by companies, but they are occasional and uncoordinated. Entrepreneurship has grown exponentially (3rd Spanish city, ahead of Valencia). Investors and companies are being attracted. Malaga's loss of identity. Social networks can eliminate the attractiveness of Malaga with bad reviews. Lack of analysis of tourist attraction for each national holiday. There are companies that are already transitioning to electric. Cruise ships help address seasonality. Negative pressure from tourism on housing and residents. Tourism concentration in the first coastal kilometre. In the medium term the density of tourist accommodation (apartments) continues to grow. Consular body: complaints about robberies, incidents with tourists. | Challenges | <ul style="list-style-type: none"> Promoting training and professionalism. Reducing job insecurity in tourism. Promoting the zero-kilometre culture that consumes local products. Promoting the "Sabor a Málaga" brand in marketing. Raising awareness of the benefits of tourism. Promoting the residential character of the centre. Identifying the type of waste generated by establishments. Measuring and assessing tourist load. Controlling holiday accommodation by zone. Increasing awareness campaigns on the importance of tourism. Decentralising the activity of holiday apartments. Promoting ecological tourism in specific zones of the city in new developments like the Expo zone. Having a government programme to establish the challenges of the coming years. Promoting funding for social housing for rent. Learning about environmental taxation and knowing what things cost, because without economic sufficiency there is no sustainability. Increasing the budget for tourism management in all its possible branches. |
| | Best practice/ Solutions in place | <ul style="list-style-type: none"> Medium-term innovation project - data office: georeferenced information (add data generators). European IOT technology project with European projects. Centesimal project: measuring capacity and data. Tourism: data controls for national holidays. Green port (2017): promoting the 2030 agenda and zero emissions (tree zones, photovoltaic zones, electrical connection of ships). Turismo Costa del Sol is working with operators to find out the number of tourists by nationality, concentration by day and night, by municipalities. Forecasts. Turismo Costa del Sol: tourist hotspots to establish tourists by nationality, routes and habits. TCS: Sustainability project: carbon footprint calculator at each tourist's destination (since 1993 they have profiles of tourists, mobility at destination, most visited zones). Can be compensated through tree planting and marine projects. TCS: Water footprint of establishments. Accessibility and decentralisation improvement projects: Pedregalejo promenade. Improvement of municipal public space at the request of districts. Proposal to limit holiday accommodation by zone. | Indicators for monitoring and evaluation | <ul style="list-style-type: none"> Reading water meters in real time: real-time graphs of water consumption. IOT platforms that will read rubbish bins. Energy consumption of the City Council. Tourist attendance control: port alerts Tourism and is organised with police. Turismo Costa del Sol's big data. Transfer from commercial premises to housing. Income from taxes linked to tourism (Gestrisam), Andalusian Tax Observatory. Chair of Applied Economics (Public Finance). Telephone survey on the perception of tourism. |



Workshop of the stakeholders of STO Malaga: 'Present and Future of Sustainable Tourist Destinations'.

06.2.

Given that STO Malaga is created with the aim of promoting sustainable, accessible, inclusive and participatory tourism that acts as a catalyst for positive change by bringing together all the data insights that are relevant to smart, sustainable and resilient destinations, and provide all stakeholders the opportunity to design a tourism model that can balance the needs of people, the planet and the prosperity of present and future generations, for the Department of Tourism and City Promotion of Malaga City Council together with the World Tourism Organization (UN Tourism) it has been a unique opportunity to carry out the STO Málaga Stakeholders' Workshop entitled 'Present and future of sustainable tourist destinations' to present the conclusions obtained by local actors in the city of Málaga

in the Expert Roundtables and share them with the rest of the INSTO Network Observatories.

The Workshop was held at the H10 Chroma Hotel on November 23 and 24, 2023 with a program made up of more than a dozen presentations and debates that revolved around the sustainable tourism management of destinations and the exchange of experiences. Representatives of 20 sustainable observatories from all over the world participated in them.

A program made up of more than a dozen presentations and debates that revolved around the sustainable tourism management of destinations and the exchange of experiences.

During the Stakeholders' Workshop, valuable knowledge and analysis on tourism was shared, in addition to discussing strategies to face challenges and take advantage of current opportunities in the tourism field, such as the development of the labour of the Sustainable Tourism Observatory of Malaga.

The event was attended by leading international tourism experts, government officials, private sector leaders and other relevant stakeholders from Asia, America, Europe and other parts of the world, making it a major event establishing significant alliances and collaborations, making difference in the city of Malaga's on the path towards Sustainability in all its aspects.





Photos of Workshop of the stakeholders of STO Malaga: 'Present and Future of Sustainable Tourist Destinations'.



STO Malaga Dashboards

According to Local Agenda 21, which was approved in March 2015, Malaga aspires to be a destination appreciated by its visitors, citizens and stakeholders of the sector, for its ability to generate memorable moments, citizen coexistence and sustainable development. The city's values that will guide its tourism development in the future are:

**INNOVATION, INTELLIGENCE, SUSTAINABILITY,
DIVERSITY, INCLUSION, ACCESSIBILITY AND SAFETY.**

To remain in tune with these values, the STO Málaga plays an important role in governance. In the Malaga Tourism Strategic Plan 2021-2024, the importance of making progress in the field of destination governance was already pointed out, especially in the field of monitoring objectives and indicators. Although much information is already available in the city, the STO Málaga offers the opportunity to gather and extend information to all areas relevant to sustainable tourism (economic, social and environmental). This includes information of great relevance for the city, such as the continuous monitoring of the evolution of holiday apartments within the city, as well as the zones and times of overcrowding in certain places of interest. Being able to generate this information on a regular basis and make it easily accessible to all stakeholders will enable the city to support both the public and private sectors in their decision-making processes.

Being a member destination of the STD Network, the city is currently building its own digital data portal (SID), where information about



many of the areas mentioned above, in addition to new data points, will be available to all stakeholders in the tourism offer. This offers a huge opportunity for the observatory, as the information is already available digitally and the additional information collected by the observatory can be easily integrated into the existing data infrastructure. The data platform is planned to be open to all tourism stakeholders (with login) on the tourism offer side.

So far, the following information has been integrated into the data portal: de datos:

| Information available | Indicators |
|--|---|
| Information on the accommodation offer | Time series available from: 2016 (annual info) <ul style="list-style-type: none"> No. of establishments (by types and categories) No. of beds (by types) Evolution of the offer side |
| Information on overnight stays in hotels | Time series available from: 2005 (monthly info) <ul style="list-style-type: none"> No. of travellers (national/international) No. of nights Average length of stay |
| Airport statistics | Time series available from: 2010 (monthly info) - No. of passengers <ul style="list-style-type: none"> No. of flights No. of international flights No. of countries connected Passengers and flights by country of origin Passenger and flight information for the main national airports. Top 20 airports with the highest number of flights |
| Information on cruise ships | Time series available from: 2005 - annual information; 2019 – monthly information <ul style="list-style-type: none"> No. of cruise ships No. of passengers No. of cruise ships in Spain’s main ports |
| Information on buses | Time series available from: TBD (monthly info) <ul style="list-style-type: none"> No. of passengers (national/ international) |
| Health-related information (COVID-19) | Knowledge derived from an existing external dashboard was developed. Available on GitHub. |

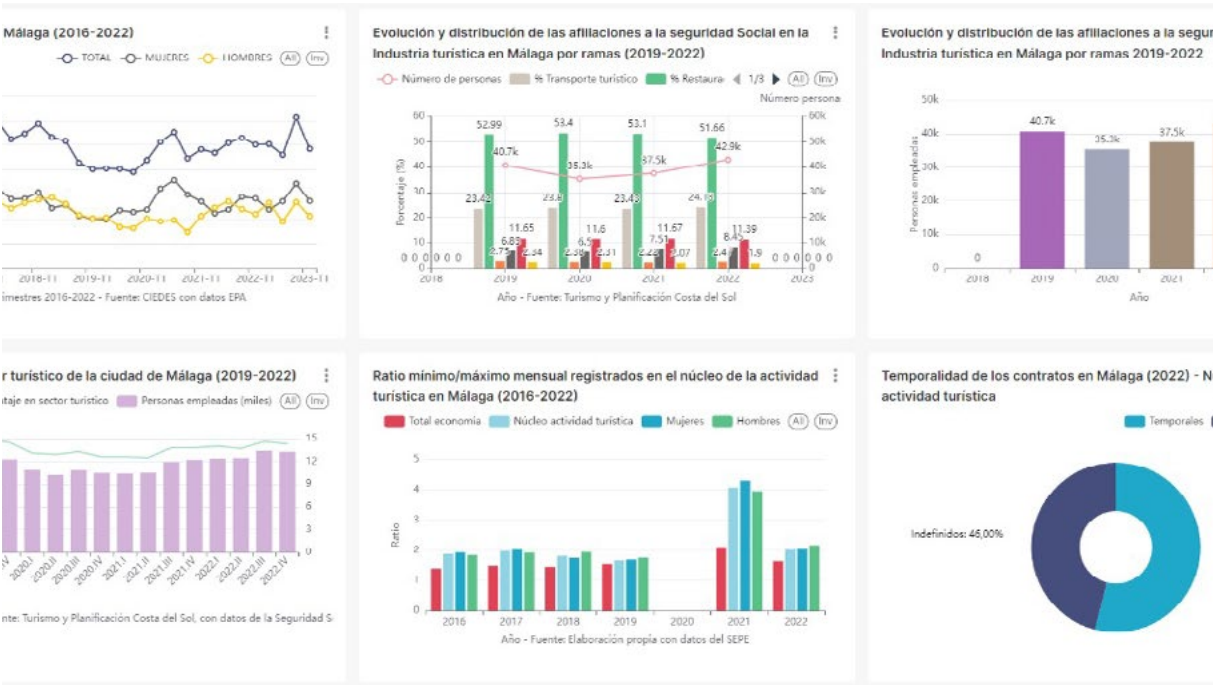


The aforementioned website is still under construction and there is a lot of content to be uploaded, but it has already made some progress by including general information about the observatory such as its mission and objectives, information about the STO Commission, activities that are being carried out and the reports have already been published by the different thematic areas. The incorporation of the indicators related to the reports is in process, which, with the help of staff from the University of Malaga, specialised in computer science, are already beginning to be incorporated into a superset of tests of the city council. This work on the superset will then be exported to the production side and there the necessary tweaks and configuration will take place. The website also provides a space to add sustainable initiatives. This section will have a brief introduction to the different sustainability initiatives and measures carried out by public bodies and private companies in the tourism sector, which have been received through the corresponding contact email on the web. Finally, the page will have a gallery of images and videos related to the initiative and the events developed within it.

In addition to the information shown in the table above, more information has recently been integrated, including:

- Extension of information on the offer side by integrating information on occupancy and income of accommodation establishments.
- Extension of cruise information to include arrival forecasts.
- Real-time information on beach-related data.
- App data for real-time tracking.
- Inclusion of flight search options.

The data collected by the new observatory is planned to be integrated into STO Málaga Dashboards in the future. In addition, these indicators will be incorporated into the STO's own website.





Centre
Pompidou
Málaga



Financing of the Observatory 08.

Since the Observatory is an integral part of the Department of Tourism and Promotion of the City of Malaga, the initial funding to constitute the entity and guarantee the longevity of the structure and the basic monitoring activities of the Observatory also come from the same department (therefore, from already existing internal funds).

Additional funding is planned to extend monitoring activities beyond basic and mandatory knowledge in the future, including ad-hoc research projects and potential data exploration activities, through additional external flows derived from public calls, as well as collaborations with other organisations (e.g., universities, research centres, etc.). In order to be able to attract more funds for the project both internally and externally, it will be key to show its membership in the INSTO network as well as its value to the different stakeholders in the destination and beyond, which will make it easier to secure long-term support and funding.

In addition, existing partnerships play a key role in supporting the Observatory's efforts in the first place. Given that the efforts of the initial year will especially focus on establishing the most effective structures, bringing order to existing data insights, integrating into SID and initiating regular stakeholder engagement processes, it is essential that these activities are led by existing, knowledgeable and well-connected team members. With further extensions of measurement activities over time and additio-

nal research activities, further collaboration with external partners (e.g., consultants, other departments of the City Council, universities, etc.) will be considered.

STO Málaga is part of the municipal strategy of the Malaga City Council. Due to its relationship with the objective of turning Malaga into a center for the transfer of knowledge and information in the tourism and sustainable field, it is led by the Department of Tourism and Promotion of the City, and has the collaboration with all the Municipal Departments that are directly or indirectly related to the tourism sector, so the financing of the observatory is municipal.

Likewise, additional funds from other funding sources are considered, such as subsidies, European funding aid, etc., to expand and develop, as a public administration, more inclusive, efficient and quality public services for both, residents. and visitors.



Long-term objectives

- Review and development of the initial structure, indicators, activities and work plan of the STO.
- Evaluation and optimisation of initial data collection processes and clean-up and preparation efforts.
- Detailed discussions with research partners on joint data projects: initiation of specific work.
- First expansion of existing STO indicators and integration into STO Dashboards.
- Review and inclusion of other external data sources to the mix of existing indicators.
- Review of the STO Dashboards platform and start of user experience improvement cycles.
- Review of focus areas and a potential extension thereof (and/or deepening of knowledge in these areas).
- Regular ongoing meetings with the Local Stakeholder Group to discuss progress, strategic priorities and activities.
- Identification and communication of examples of best practices, potentials and opportunities in the destination.
- General destination awareness-raising activities around the sustainability and resilience of the destination.
- Preparation of the second annual report for INSTO.
- Networking and exchanging knowledge and experiences with other tourist



Annex

Table: CIEDES Expert Panel Methodology. Relationship of Thematic Blocks with Area under Study

| Thematic blocks | Areas under study |
|--------------------------|--|
| Economic Sustainability | <ul style="list-style-type: none">Sustainable audiovisual productionEmploymentEconomic benefits at destination levelTourism seasonality |
| Sostenibilidad social | <ul style="list-style-type: none">Social eventsLocal satisfactionAccessibilityEducationTraining in sustainability and health-related information |
| Sostenibilidad ambiental | <ul style="list-style-type: none">Energy managementWater managementWastewater managementSolid waste managementClimate change |
| Gobernanza | <ul style="list-style-type: none">Mobility (including cruise ships)Tourism offerGovernance |

Expert panel methodology

The expert panel methodology follows a structured technical approach consisting of two key meetings with an initial plenary session, followed by the subdivision of participants into thematic clusters. The common structure of both meetings is detailed below:

Part One - Plenary Session:

- Formal start of the session.
- Introduction of the participants and thanks.
- Reporting by UMA: submission of detailed reports. These reports serve as a basis for further discussion.

Part Two - Group Work:

The participants are subdivided into groups according to thematic blocks (classification is based on UN Tourism guidelines). Each group focuses on specific aspects related to their work area. The tasks carried out were:

- Exchange of Best Practices: Within each group, the best practices implemented by the organisations represented are shared and discussed. The exchange of knowledge and experiences between experts is encouraged.
- Consensus of Facts, Challenges and Indicators: Groups work on agreeing on facts, challenges and relevant indicators within their respective thematic blocks. The aim is to establish a common understanding and define key areas of approach.
- Proposal of Actions to the Stakeholder Committee: The groups propose specific actions based on discussion and consensus achieved. These proposals are submitted to the Stakeholder Committee for review and consideration.
- Additional Comments: At both meetings, technical facilitators, staff of the CIEDES Foundation, are appointed to guide the discussion and ensure that the agreed agenda is met.
- Documentation: the documentation used in both meetings was the basic reports prepared by the University of Malaga, and template and survey prepared by CIEDES that was shared with all those attending the sessions.

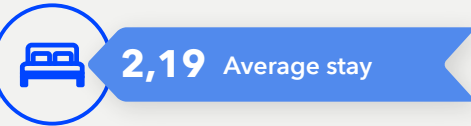
Methodology Reports of Thematic
Areas (Season and Employment)

The seasonality of both overnight stays, places and employment is measured using some statistical methods that are easy to interpret. Specifically, a method is used that consists of obtaining seasonal factors that will delimit the seasonal patterns of each variable analysed. These factors are obtained from data on relative frequencies calculated by dividing the value of the variable of the month of a given year by the total value of the variable in that year. Next, the average of the relative frequencies of the same month of all the years analysed is calculated. The results obtained are percentages for each month of the year. The months in which this percentage is greater than 100% are considered high season months and the percentage points that are above in a given month correspond to the higher percentage of the variable in that month with respect to the monthly average of the year. Those months in which the percentage is less than 100% are low season months and those percentage points that are below in a given month correspond to the lower percentage of that month with respect to the monthly average of the variable.

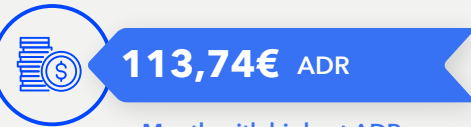
In addition, an annual seasonal concentration indicator is used, to be called the max/min ratio, which identifies those years with the highest and lowest seasonality in a given year. This ratio is calculated by the coefficient between the month with the highest value of the variable (maximum month) and the month with the lowest value (minimum month). The closer to 0 this ratio is in a given year, the less seasonality will have occurred during that year, and the further away from 0, the greater seasonality. With this ratio, the annual evolution of the seasonality of tourism demand and the segments that compose it can be analysed.

| Encargado | Área de interés |
|--|---|
| Centro Ambiental de Malaga (C.A.M) | <ul style="list-style-type: none">Solid urban waste |
| Head of Health Service | <ul style="list-style-type: none">Health report |
| Territorial Office of Health and Consumption of Malaga | <ul style="list-style-type: none">Mobility/Energy reports |
| Manager - Port of Malaga | |
| Public Participation Delegate (National Police) | <ul style="list-style-type: none">Local satisfaction |
| Department of Public Participation, External Action and Transparency | <ul style="list-style-type: none">Economic benefits |
| Municipal markets. Department of Commerce, Public Road Management and Promotion of Trade | <ul style="list-style-type: none">Management of energy/sustainable events |
| Department of Urban Transformation and Digitalisation | <ul style="list-style-type: none">Sustainable audiovisual production |
| Malaga Film Office | <ul style="list-style-type: none">Economic benefits |
| Manager. Regional Government. Tax Management | <ul style="list-style-type: none">Water management |
| Department of Operational Services | <ul style="list-style-type: none">Climate change/Energy management |
| Head of the Pollution Control and Circular Economy Service | <ul style="list-style-type: none">Climate Change/Environmental Education |
| Section Head of Biodiversity and Environmental Education | <ul style="list-style-type: none">Accessibility report |
| Head of the Accessibility Section of the Department of Social Affairs | <ul style="list-style-type: none">Local satisfaction |
| Head of Quality. Department of Tourism | <ul style="list-style-type: none">Tourism offer/ Governance |

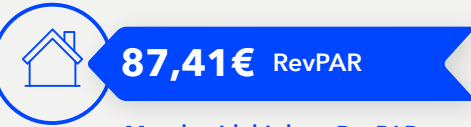
MAIN TOURISM INDICATORS FOR MÁLAGA CITY IN 2022



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



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



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



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

Source INE 2022
* Annual average

RATING OF TOURIST DESTINATION



Recommendation Repeat Satisfaction

Average rating: 8,93

Highlights: Number and variety of museums.

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

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

Number and variety of events: 8,84

Beaches and beach services: 8,88

Source: Tourism Observatory 2022

AVERAGE HOTEL EMPLOYMENT RATE



Month with highest hotel employment rate: September 2062
Month with lowest hotel employment rate: January 1542

Source INE 2022

ECONOMIC IMPACT

3.115.386.685,72€

DIRECT ECONOMIC IMPACT

1.588.847.209,72€

INDIRECT ECONOMIC IMPACT

4.704.233.895,43€

TOTAL ECONOMIC IMPACT

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

Source: Tourism Observatory 2022; INE 2022

OUTBOUND MARKETS

SPAIN

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

INTERNATIONAL

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

* Number of tourists and percentage of domestic and international travellers

Source: INE

HOTELS

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

11.274 Number of hotel beds available

Source: RTA December 2022

TRAVELLERS AND OVERNIGHT STAYS

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

Country of origin: **+39**

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

Source: INE 2022

VISITORS

3.862.148

Source: Tourism Observatory 2022

TOURIST-USE HOUSING

8.332 Number of houses
41.440 Number of beds available

Source: RTA December 2022

HOLIDAY APARTMENTS

Number of apartments: **221**
Number of beds available: **6.286**

Source: RTA December 2022

HIGH-SPEED RAIL (AVE)

1.056,3 millions
Number of passengers

Source: RENFE

AIRPORT

18.457.194 Passengers
Domestic flights: **3.322.375**
International flights: **15.075.792**
Commercial flights: **18.398.167**
Passengers in transit + other air traffic: **39.027**

Source: Málaga Airport (AGP) 2022

FLIGHT CONNECTIONS

144 Connected destinations
Domestic destinations: **21**
International destinations: **123**

Source: Málaga Airport (AGP) 2022

CRUISE PORT

342.045
Number of passengers
267 Stopovers

Source: Málagaaport

SPANISH LANGUAGE SCHOOLS



Number of schools: **15+**
Number of students: **18.000***

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

SICTED



Awarded companies: **243**

VISITORS SERVED AT THE TOURIST OFFICE NETWORK

693.523

Main countries of origin:

Spain **270.990**

France **77.453**

United Kingdom **72.946**

Germany **34.389**

Italy **32.466**

Netherlands **25.972**

United States **19.681**

Source: Tourist Information Office, Department of Tourism

CULTURE AND ENTERTAINMENT



40
MUSEUMS



7
DINING AREAS



18
ART GALLERIES



55
LANDMARKS AND PLACES OF INTEREST

PEDESTRIAN PARTLY-PEDESTRIANISED STREETS



144 Km
Source: Urban Agenda (indicator #30)

ANDALUSIAN TOURISM REGISTRY



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

Source: RTA December 2022

MÁLAGA PROVINCE

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

Number of
Tourists: **12.800.000**

Accommodation
facilities: **61.306**

Number of hotel beds available **509.845**

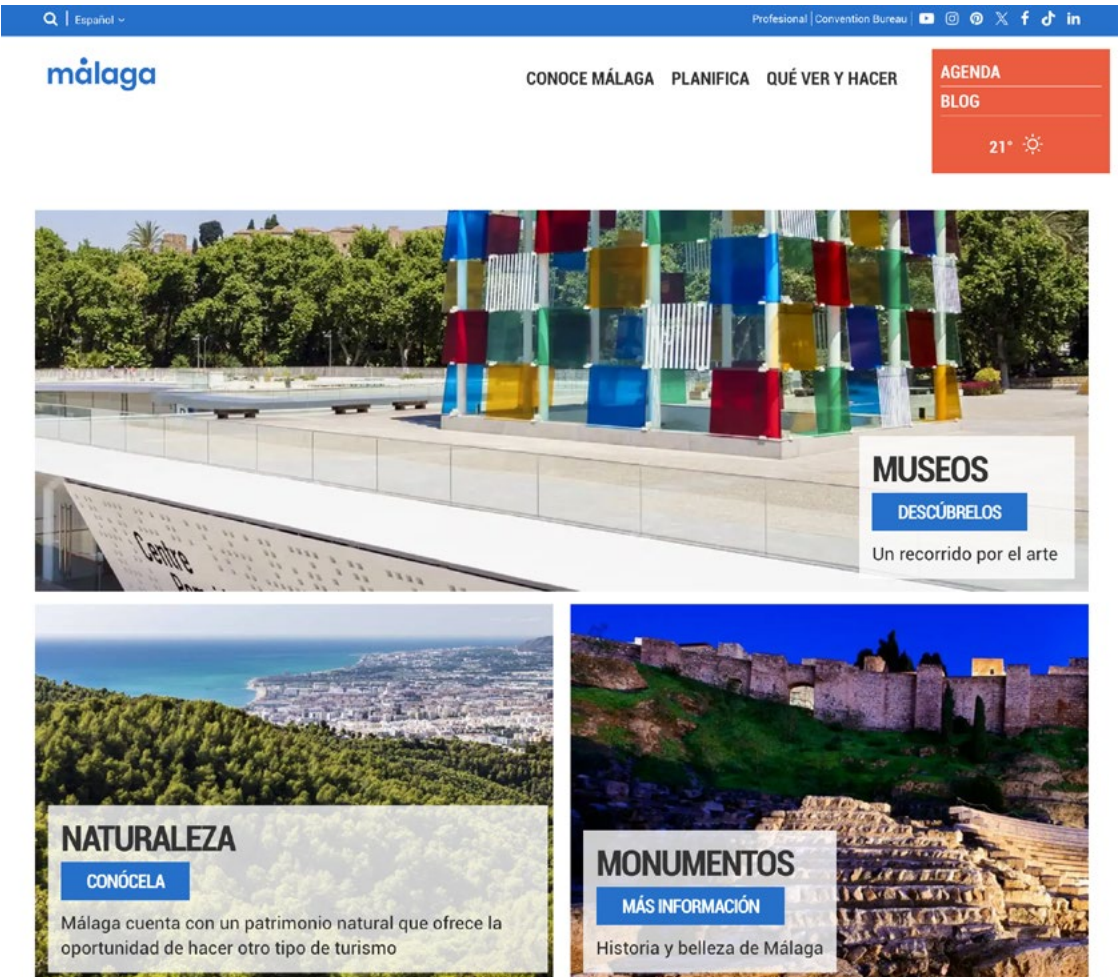
HOTEL INDICATORS

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

EMPLOYMENT RATE: **186.870**

Total economic impact
17.081.000 €

Promotional web
visita.malaga.eu





sto.malaga.eu