



Sustainable Tourism Observatory of Malaga

Employment



Table of contents

<hr/>		Pg. 7
01.	Context	
<hr/>		Pg. 11
02.	Targets	
<hr/>		Pg. 11
03.	Methodology	
03.1.	Data sources and variables	pg. 11
<hr/>		Pg. 15
04.	Results	
04.1.	Analysis of the recent evolution of employment and unemployment in the city of Malaga	pg. 15
	Total employment in the city and by gender	pg. 15
04.2.	Recent evolution of unemployment Malaga and by gender	pg. 16
04.3.	Analysis of employment in the Tourism Industry in the city of Malaga	pg. 18
	Employment in the Tourism Industry in Malaga based on Social Security affiliation	pg. 18
	Analysis of employment in the tourism industry according to branches of tourism activity	pg. 18
	Analysis of employment in hotel establishments and holiday apartments with the estimates of the National Institute of Statistics (INE)	pg. 22
04.4.	Contract dynamics in core tourism activities	pg. 24
<hr/>		Pg. 31
05.	Conclusions	

Context

Employment in the tourism sector is of utmost importance in the analysis of the dynamism of the sector, with enormous impact on the growth and development of the destination, as is the case of Malaga.

In this context, employment emerges as a critical component, affecting not only individuals in search of job opportunities, but also the socio-economic context, especially when it comes to destinations that are subject to profound changes, such as the transition to smart destinations¹.

According to data estimated by the Tourism Institute of Spain (Turespaña)², in 2022, employment in the tourism sector constituted 12.8% in relation to total employment in the national economy. In this context, the tourism activities that have experienced the greatest year-on-year increase in the number of people employed at national level are accommodation services, with 20.9%; followed by passenger transport, with 12.9% and hospitality, which registered an increase of 6%. Despite the start of a recovery in employment overall at the national level (see Figure 1), by 2022 the pre-pandemic level of employment had not yet been achieved.

¹ Baum, T. (2015). Human resources in tourism: Still waiting for a change? – A 2015 reprise. *Tourism Management* 50, 204-212.

² Public Company for the Management of Tourism and Sport. Regional Government of Andalusia (2022). *Employment in the tourism sector in Andalusia. Year 2022*. Ministry of Tourism, Culture and Sport, Regional Government of Andalusia.

“The tourism activities that have experienced the greatest year-on-year increase in the number of people employed at national level are accommodation services, with 20.9%; followed by passenger transport, with 12.9% and hospitality, which registered an increase of 6% 2022.”

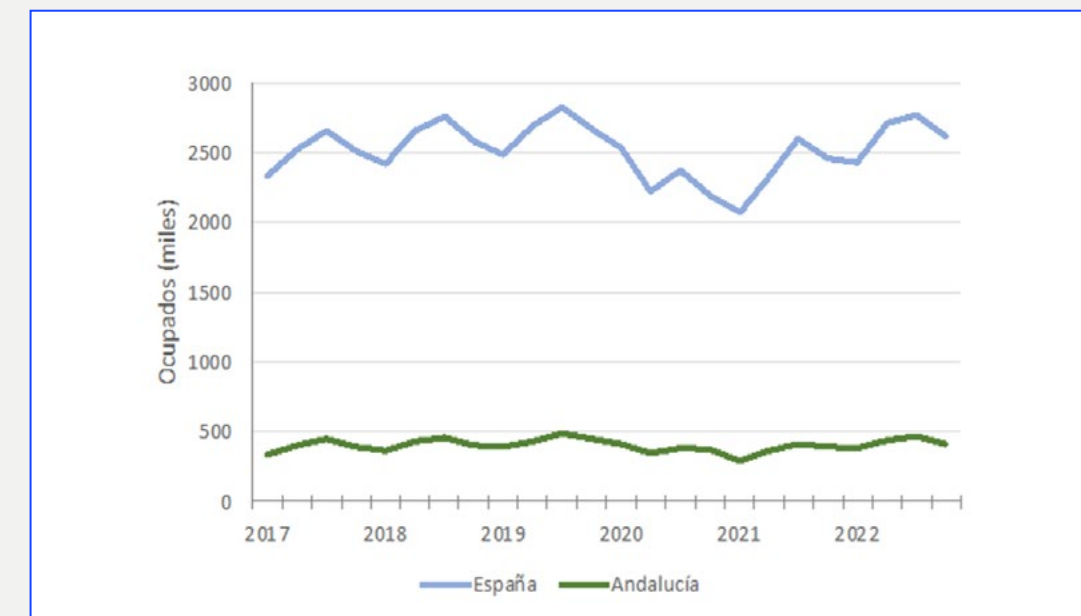
In Andalusia, the report by the Ministry of Tourism, Culture and Sport indicates that in 2022, the tourism labour market accounted for 16.3% of all services and 12.5% of the total Andalusian economy. In the regional context, in 2022 recovery was also still below pre-pandemic levels.

“In 2022, the tourism labour market accounted for 16.3% of all services and 12.5% of the total Andalusian economy.”

ment (with the exception of the quarters of 2020 when the crisis was most acute), both in the regional and national sectors.

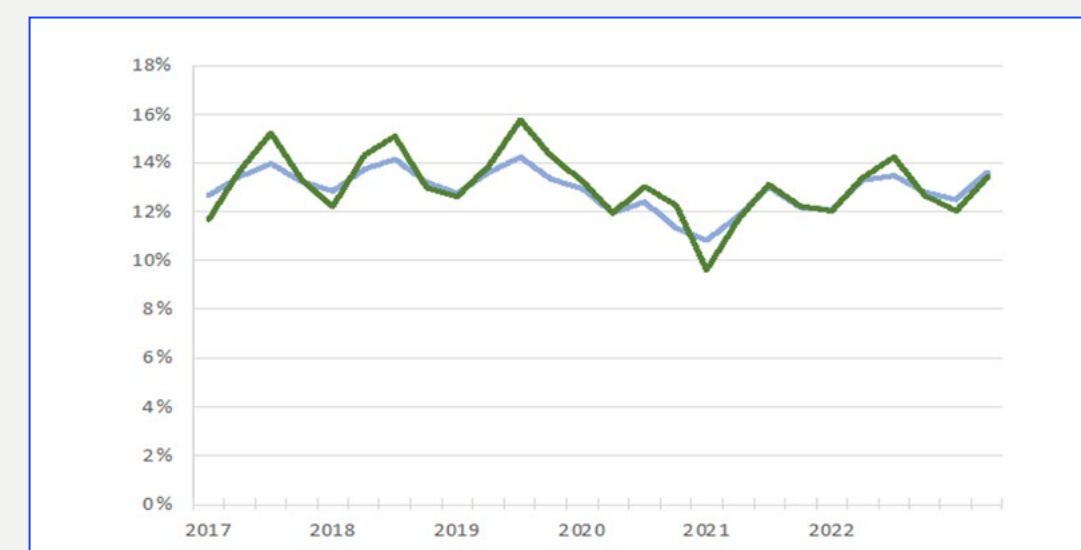
The evolution of employment participation figures in the tourism sector with respect to the total, both at the national and regional levels (Figure 2), shows the importance of the sector as one of the main drivers of the labour market, exceeding 12% of total employ-

Figure 1: Evolution of the number of people employed in the tourism sector in relation to the national and regional context 2017-2022



Source: Interpretation of LFS (INE) data by Turespaña

Figure 2: Percentage of employment in the tourism sector with respect to the total, Spain and Andalusia (2017-2022)



Source: Interpretation of LFS (INE) data by Turespaña

02.

Targets

- Promote decent employment in the tourism sector.
- Support the professional training of employees in tourism through specialised courses according to the demands of the sector.
- Promote entrepreneurship and green employment.

03.

Methodology

Data sources and variables

The methodology used to carry out the employment diagnosis in Málaga's tourism sector was based on the analysis of quantitative data using data available from 2016 to 2022.

The study is based on statistical data obtained from:

- Data Office, Public Company for the Management of Tourism and Sport and Regional Government of Andalusia.
- CIEDES Foundation, with data from the Labour Force Survey (LFS).
- Employment Reports of the Tourism Sector in Andalusia (Areas and Provinces).
- Turismo y Planificación Costa del Sol: Big data (specific interpretation with Social Security affiliation data).
- Spain's National Institute of Statistics (INE) Hotel Occupancy Survey and Holiday Apartment Occupancy Survey.

- 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.
- Interpretation of LFS (INE) data carried out by Turespaña for autonomous communities and the national set.

The analysis was carried out with data relating to the municipality of Malaga and the tourism sector as a whole when possible. However, a specific analysis of employment in hotel establishments and holiday apartments has also been prepared given the availability of the estimates made by the INE in its occupancy surveys^{3 4} and an approximation to the dynamics in the employment contracts for a subset of branches of tourism activity with the available information.

The analysis of the dynamics of the contracts registered by the State Public Employment Service (SEPE) was based on the figures published by this service at the municipal level disaggregated by branches of activity. The disaggregation to the 88 categories of economic activities listed in the CNAE-09 is insufficient to obtain the total of the activities that make up the tourism industry in accordance with international recommendations⁵, since, among others, transport activities with this level of disaggregation do not distinguish between passenger and freight transport. Therefore, in order to collect tourism activity data, 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).

Regarding the seasonality indicators used in this report, the same methodology detailed in the seasonality report has been used.

© National Institute of Statistics (2023a). Hotel Occupancy Survey. <https://www.ine.es/>
© National Institute of Statistics (2023b). Holiday Apartment Occupancy Survey. <https://www.ine.es/>
© UNWTO (2023). Statistical framework for measuring the sustainability of tourism (SF-MST). World Tourism Organization, Madrid.



“The number of employees in the tourism sector activities in the city shows a greater recovery after the pandemic than that of the total economy”

04.

Results

Malaga’s population has shown a slight variation in the last year. In 2022, the figure stood at 580,032 inhabitants, and by 2023, this number had experienced a slight increase, reaching a total of 586,770 people.

These data are essential to contextualize the relative impact of the tourism sector on the local economy and understanding how it translates into job opportunities and challenges for citizens. Below, we present the results obtained after an exhaustive study that addresses the importance, characteristics and recent evolution of employment in the tourism sector in Malaga. This analysis will allow not only an in-depth understanding of the current situation, but also lay the foundations for future actions and strategic decisions.

Analysis of the recent evolution of employment and unemployment in the city of Malaga

Total employment in the city and by gender

The labour market in Malaga has experienced various fluctuations over the years, with specific patterns observable according to gender. In the area of occupation by gender, particular differences and trends can be identified that reflect the city’s employment dynamics.

Looking at the whole picture, which combines the employment of both genders, a growing trend can be seen (see Figure 3), which was interrupted in the years of the pandemic, and which shows a subsequent recovery, but still does not reach the pre-pandemic levels in 2022. In general, the total figures have moved between 200 thousand and 250 thousand employed people.

The differences in employment trends in the female and male groups shown in Figure 3, reflect the importance of analysing employment from a gender perspective in Malaga, underlining the remarkable female participation in the local labour market. Although the general trend in the observed period has certain similarities, we can highlight a more abrupt fall in employment as a result of the pandemic in the male group, which in turn saw faster recovery. In the women's group, in contrast, the fall was slower and the recovery was also slower. As a result, it can be observed that in 2022 the male collective had again reached the employment levels of 2019, while in the female collective this had not yet happened in 2022.

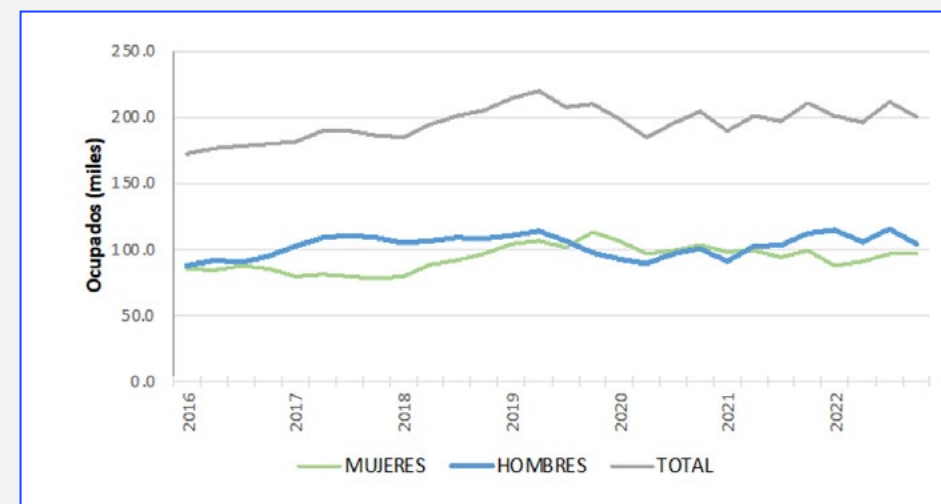
Recent evolution of unemployment Malaga and by gender

“Employment for both men and women ranged between 200,000 and 250,000 jobs in the period 2016-2022.”

In the city of Malaga, the evolution of unemployment has shown differentiated trends according to gender (see Figure 4). During the period analysed, there was a decreasing trend in the total number of unemployed people, with some temporary fluctuations.

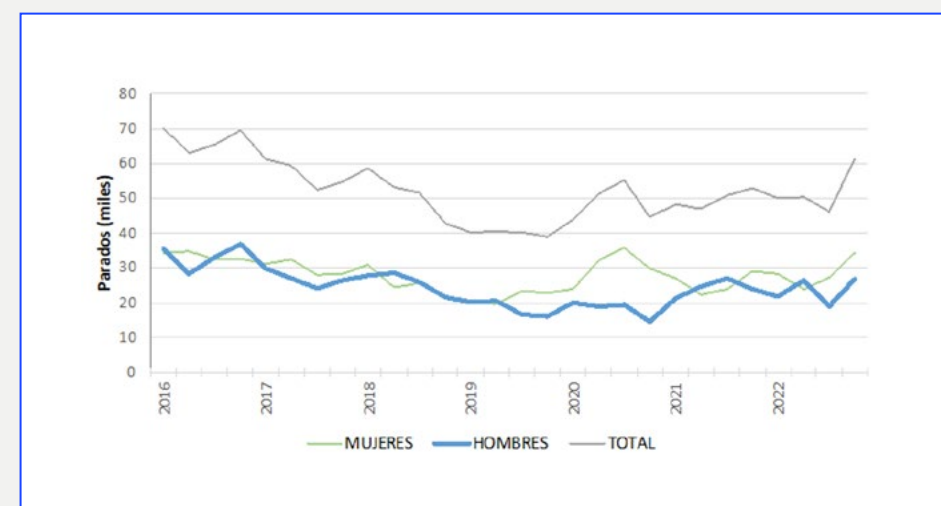
Although it has shown certain peaks and troughs, the unemployment rate among women has maintained relatively more stable levels compared to men. However, male unemployment has experienced more pronounced variations, with a notable decrease from the third quarter of 2019, followed by an increase in 2020 and a subsequent stabilisation with slight fluctuations. When considering the total number of unemployed people, composed of the sum of both genders, it can be seen that this follows a trajectory similar to that of men, indicating that changes in male unemployment have had a greater impact on the overall unemployment figure in Malaga during the period from 2015 to 2023.

Figure 3: Evolution of employment (employed people) in Malaga 2016-2022



Source: CIEDES with LFS data

Figure 4: Evolution of unemployment in Malaga 2016-2022



Source: CIEDES with LFS data

Analysis of employment in the Tourism Industry in the city of Malaga

Employment in the Tourism Industry in Malaga based on Social Security affiliation

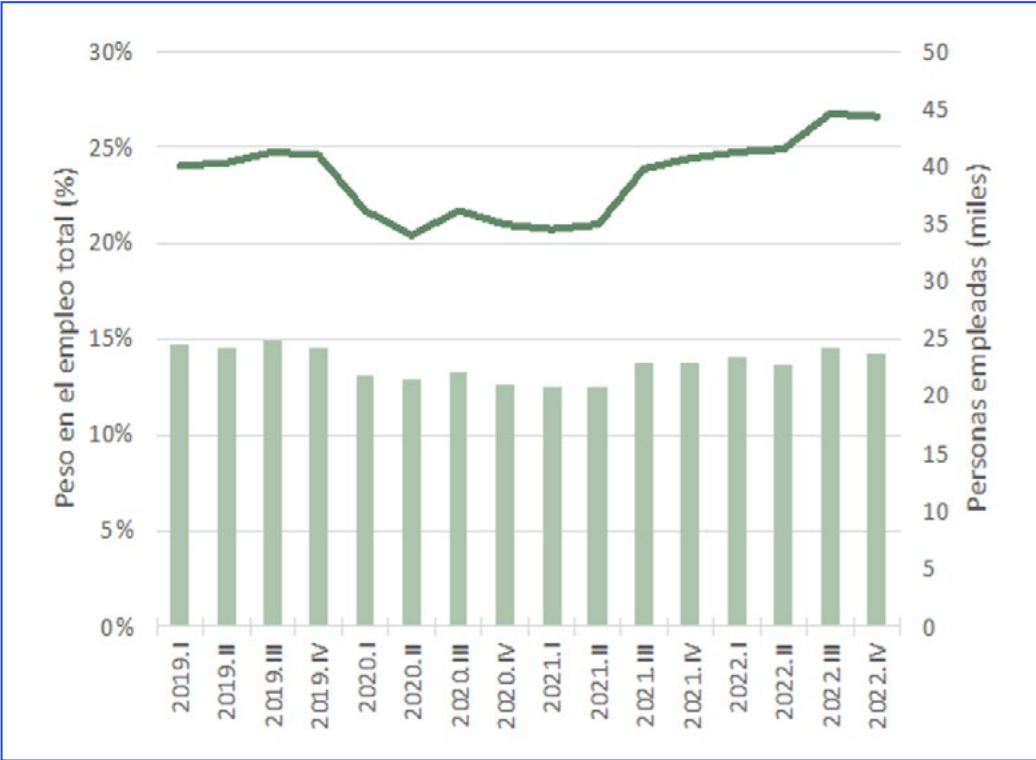
The most recent evolution of employment in the tourism industry in the city of Malaga has shown a general path similar to that of economic activity as a whole. However, as can be seen in Figure 5, which shows the number of employees in the tourism sector activities in the city obtained from Social Security affiliations, the recovery after the pandemic has been more successful in the tourism sector than in the total economy as a whole. In fact, in 2022 the pre-pandemic values of 2019 had already been exceeded.

However, Figure 4 shows that the weight that employment in the tourism industry has in the economy as a whole does not exceed 15%, with the annual average of 2022 being equal to 14.1%. This figure is higher than those recorded by Turespaña for Andalusia and Spain (13.1% and 12.9% respectively), but lower than the weight of tourism employment in the province of Malaga (18.4%).

Analysis of employment in the tourism industry according to branches of tourism activity

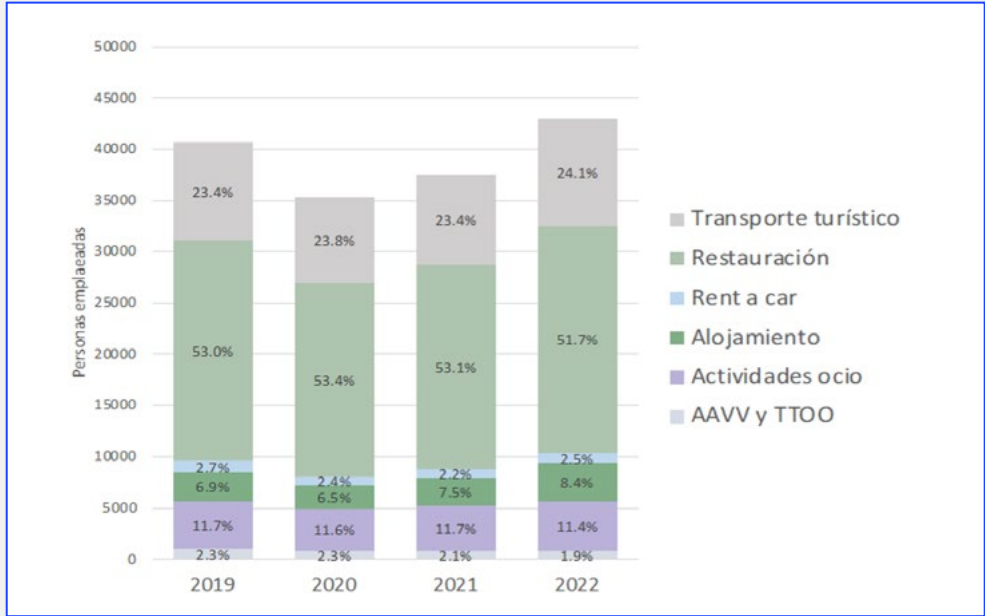
he different branches that make up tourism activity in Malaga show a characteristic distribution and evolution that can be analysed using data on Social Security affiliations by branches of activity obtained from the operation carried out by Turismo y Planificación Costa del Sol. Figure 6 shows the absolute figures and the percentages of employment in the branches of tourism in the city of Malaga in the years 2019 to 2022. The catering sector is the predominant branch with weights always above 50%, although since the pandemic it has seen a slight drop in participation, with a percentage in 2022 of 51.75 of total employment. The other branches with weights greater than 10% are tourism transport and leisure activities, which in 2022 represent 24.1% and 11.4%, respectively. Both branches have shown a very stable evolution in terms of participation in total employment in tourism.

Figure 5: People working in the tourism sector in the city of Malaga 2019-2022



Source: Turismo y Planificación Costa del Sol, with Social Security data

Figure 6: Evolution and distribution of Social Security affiliations in the tourism industry in Malaga by branch 2019-2022



Source: Turismo y Planificación Costa del Sol

Among the rest of the branches, employment in accommodation stands out. This has shown a sustained growth pattern in recent years, reaching 8.4% of total employment in tourism in the city in 2022, this figure being equal to 6.9% before the pandemic.

When compared to the previous year and compared to 2019, in 2022, the employment growth rates by branch show a very dynamic activity in

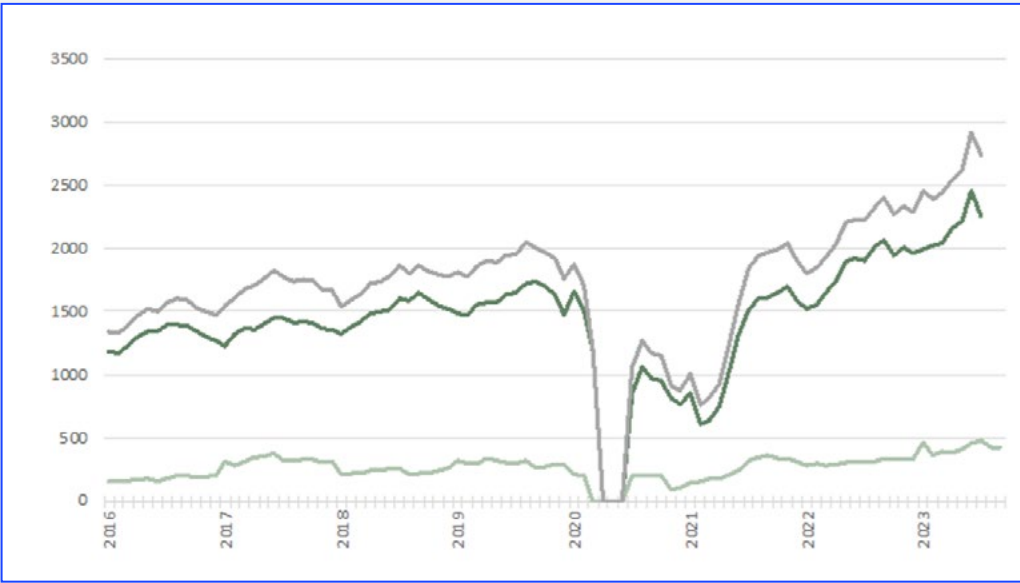
“The catering sector is the predominant branch with weights always above 50%, followed by tourism transport with 24.1% and leisure activities with 11.4% in the 2019-2022 period”

branches such as accommodation, with a growth of more than 25% compared to 2021 and compared to 2019, and rent-a-car, which despite having grown more than 25% in 2022 compared to 2021, has not yet recovered pre-pandemic employment levels (Table 1). Something similar is observed in the branch of travel agencies and tour operators, which shows a negative rate compared to 2019, that is to say, it has not recovered its pre-pandemic le-

vel. The rest of the branches have recovered the level of 2019 and show year-on-year growth in 2022, with a highlight being tourism transport with a year-on-year rate of 18% in 2022.

Overall in 2022, total employment in the tourism industry shows a year-on-year rate of 14%, having exceeded the level of 2019 by 6%. These figures show that employment in tourism in general in the city of Malaga is more dynamic than that of the city’s economy as a whole, which, as analysed in previous paragraphs, had not reached the levels of 2019 in 2022.

Figure 7: Employment in hotel establishments and holiday apartments in Malaga 2016-2023



Source: INE Hotel and Holiday Apartment Occupancy Survey

Table 1. People working in the tourism sector in the city of Malaga by branch of activity 2022 (annual average)

“In 2022, total employment in the tourism industry shows a year-on-year rate of 14%.”

	Employment	Year-on-year growth rate (compared to 2021)	Growth rate
TAs and TOs	817	5%	-14%
Leisure activities	4,887	12%	3%
Accommodation	3,625	29%	30%
Rent a car	1,062	27%	-5%
Restaurants	22,166	11%	3%
Tourism transport	10,355	18%	9%
Total	42,911	14%	6%

Source: Compiled by author based on social security affiliation data from Turismo y Planificación Costa del Sol

Analysis of employment in hotel establishments and holiday apartments with the estimates of the National Institute of Statistics (INE)

The figures estimated by the INE occupancy surveys in hotel establishments and in holiday apartments allow^{6,7} us to know the monthly evolution of employment in these two tourism industries at the level of geographical disaggregation of the city of Malaga, since this is considered a tourism point by the INE. Figure 7 shows the monthly evolution of both employment figures estimated by the INE since 2016. It is noted that this branch of the tourism industry has experienced an important recovery since 2021 with notable growth rates, especially in relation to hotel establishments.

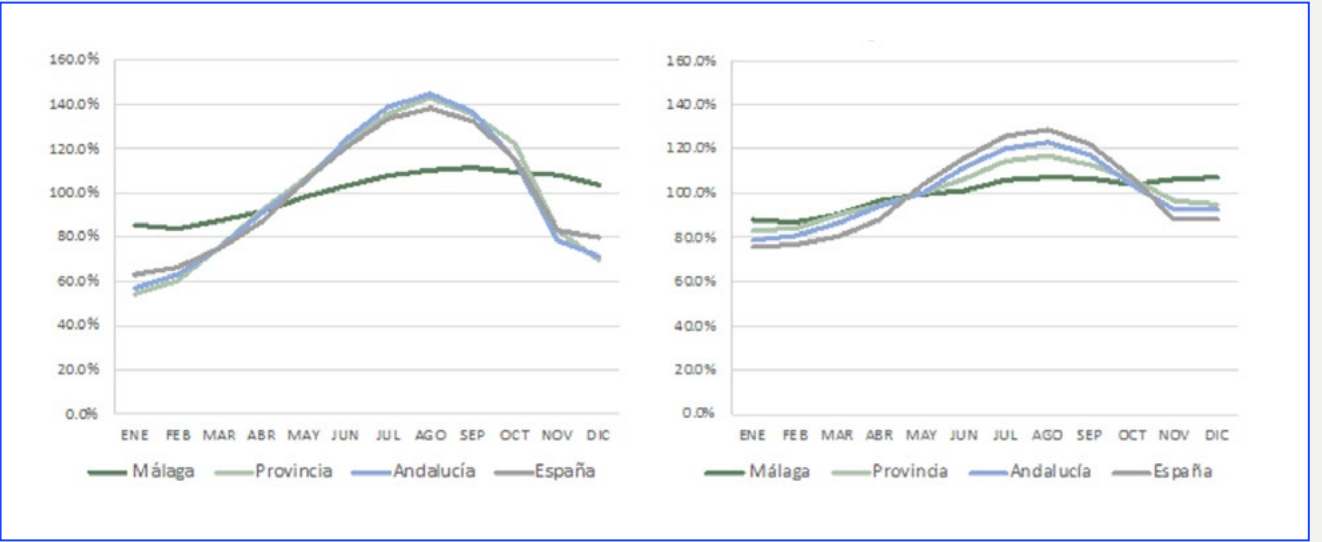
After the crisis, the recovery of employment in the accommodation sector (hotel establishments and holiday apartments) in the city of Malaga has shown an increase of 13.3%, which is faster than in the province, the autonomous community and the country as a whole, all of which are experiencing lower levels than in 2019, with negative rates of -2.7%, -3.2% and -4.1%, respectively.

The degree of seasonality in employment in the accommodation branch in the city of Malaga is lower than that recorded with monthly data in the province as a whole, in the autonomous community or at the national level, in accordance with the tourism product offered and the characteristics of the city⁸. Thus, the maximum/minimum monthly ratio of this series is significantly lower in the data recorded in all the years contemplated in this report. This characteristic, which is a consequence of the tourism product offered by the city, is of special importance for the design of municipal tourism policies in this regard.

The availability of monthly data in these series allows us to estimate their degree of seasonality. On the one hand, the seasonal patterns, represented in Figure 8, show a much more balanced monthly distribution in the city than in the provincial, autonomous and regional areas, with a less pronounced high season. This difference is less pronounced in the case of holiday apartments.

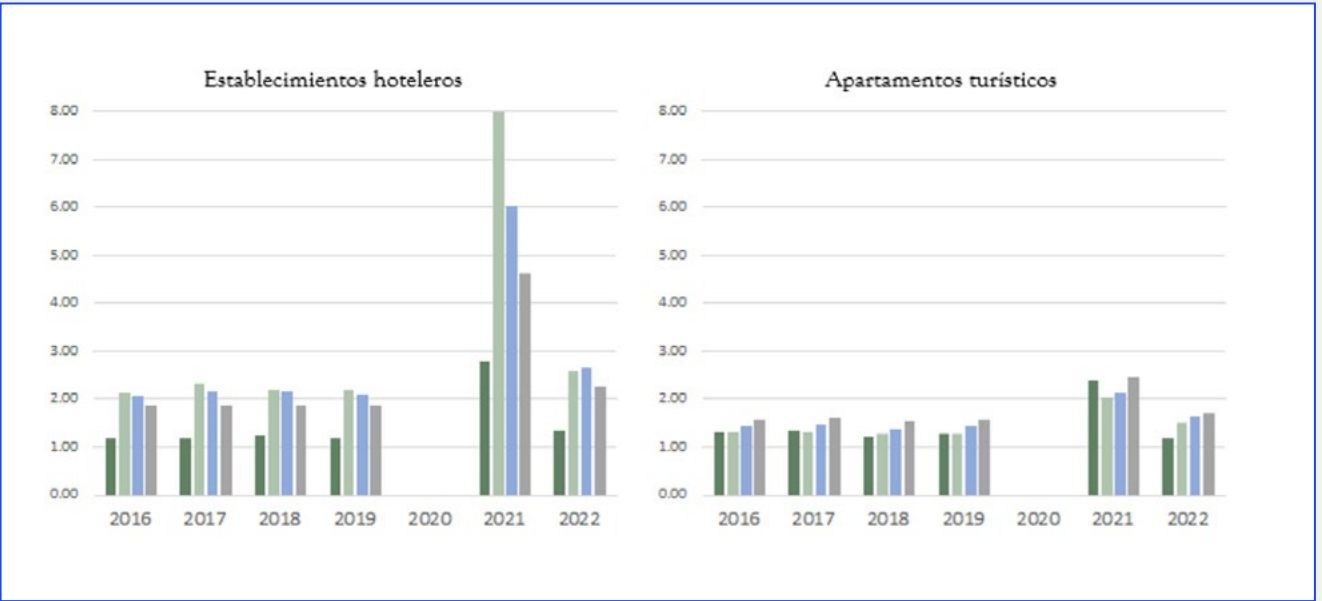
© National Institute of Statistics (2023a). Hotel Occupancy Survey. <https://www.ine.es/>
© National Institute of Statistics (2023b). Holiday Apartment Occupancy Survey. <https://www.ine.es/>
©Fernández-Morales, A., McCabe, S., Cisneros-Martínez, J. D. (2023). Is Social Tourism a Vector for Destination Resilience to External Shocks? Evidence From Spain. Journal of Travel Research. <https://doi.org/10.1177/00472875231200493>

Figure 8: Seasonal factors of employment in hotel establishments and holiday apartments 2016-2019



Source: INE Hotel and Holiday Apartment Occupancy Survey

Figure 9: Maximum/minimum monthly employment ratio in hotel establishments and holiday apartments 2016-2022



Source: INE Hotel and Holiday Apartment Occupancy Survey

The seasonality indices represented in Figure 9 are in line with the previous estimates. In the hotel accommodation sector, the maximum/minimum ratios are much lower in all years than those estimated in the province of Malaga, Andalusia or Spain. With regard to holiday apartments, the differences are smaller, although in general there is also a lower seasonal concentration with this indicator in the city of Malaga.

Contract dynamics in core tourism activities

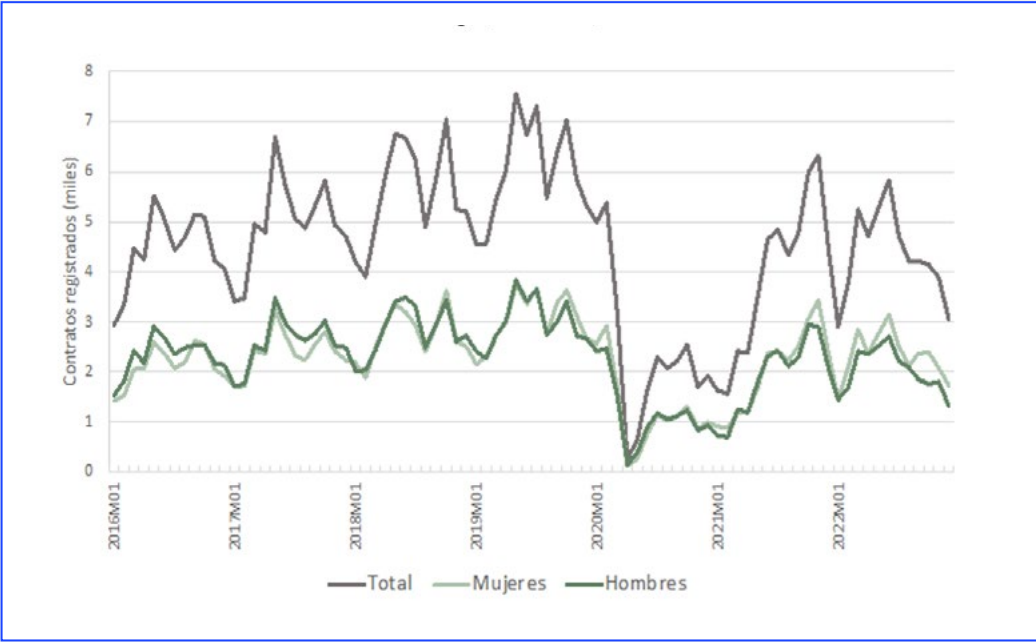
“The dynamics of hiring by gender are changing, with women being the most hired group in recent years.”

The recent monthly dynamics of employment contracts in core tourism activities in the city of Malaga (understood as the set of economic activities that brings together accommodation, catering, travel agencies and related activities) has been marked by the general evolution of the labour market and the economic events derived from the pandemic. Despite a clear recovery since 2021, in 2022 the level of monthly hiring prior to 2020 had not yet been reached (Figure 10). On the other hand, there are no notable differences between genders in terms of the monthly evolution of both series.

The average annual figures, shown in Table 2, indicate that despite the fact that in 2022 there were notable positive year-on-year growth rates compared to the previous year, especially in the case of women (14.97%), these are not sufficient to reach the average monthly level of contracts prior to the pandemic. Growth rates compared to 2019 are still negative (-28.1% in all the activities of core tourism activity). This rate is also lower than that recorded by the local economy as a whole (-10.5%), which has not recovered the dynamics seen in contracts prior to the pandemic.

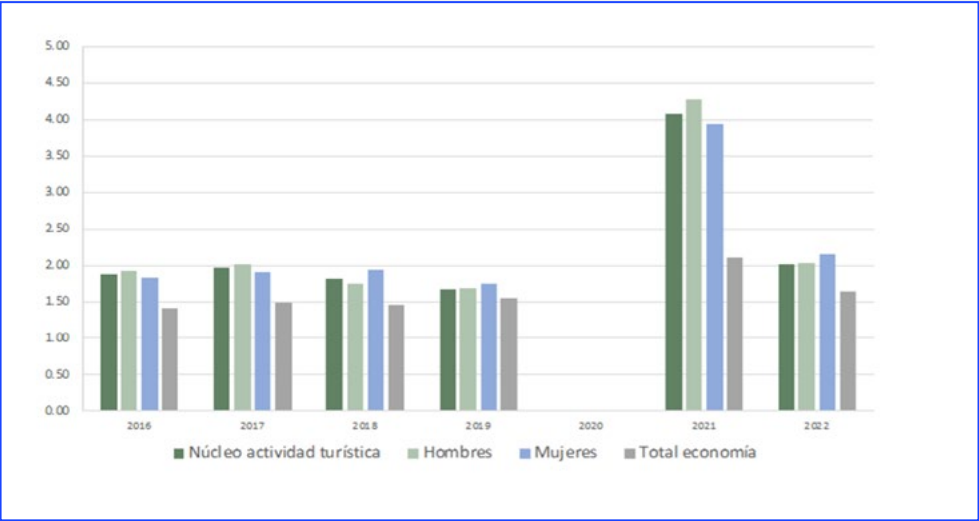
Another feature of interest that can be extracted from the recent evolution of contracts in the activities that make up core tourism activity contemplated in Table 2 is the greater presence of women in all the years analysed. This difference has been gradually accentuated and it is worth mentioning that it has reversed the gender composition prior to 2019, which was mostly male

Figure 10: Evolution of employment contracts registered in core tourism activity in Malaga (2016-2022)



Source: Compiled by author based on data from SEPE

Figure 11: Monthly minimum/maximum ratio recorded in core tourism activity in Malaga (2016-2022)



Source: Compiled by author based on data from SEPE

Furthermore, the dynamics of contracts in core tourism activities show clear seasonal behaviour, higher than that of the city’s economy as a whole, as shown by the maximum/minimum monthly value ratios in Figure 11. There are some differences between genders in the degree of seasonal concentration that are not consistently maintained in the different years contemplated in this study.

Regarding the monthly seasonal pattern, represented in Figure 12 for the last full year available (2022), a remarkable concentration is observed in the months prior to the summer season. The differences between men and women in the 2022 seasonal patterns can be considered as exceptional in some months, given that the overall configuration is quite similar.

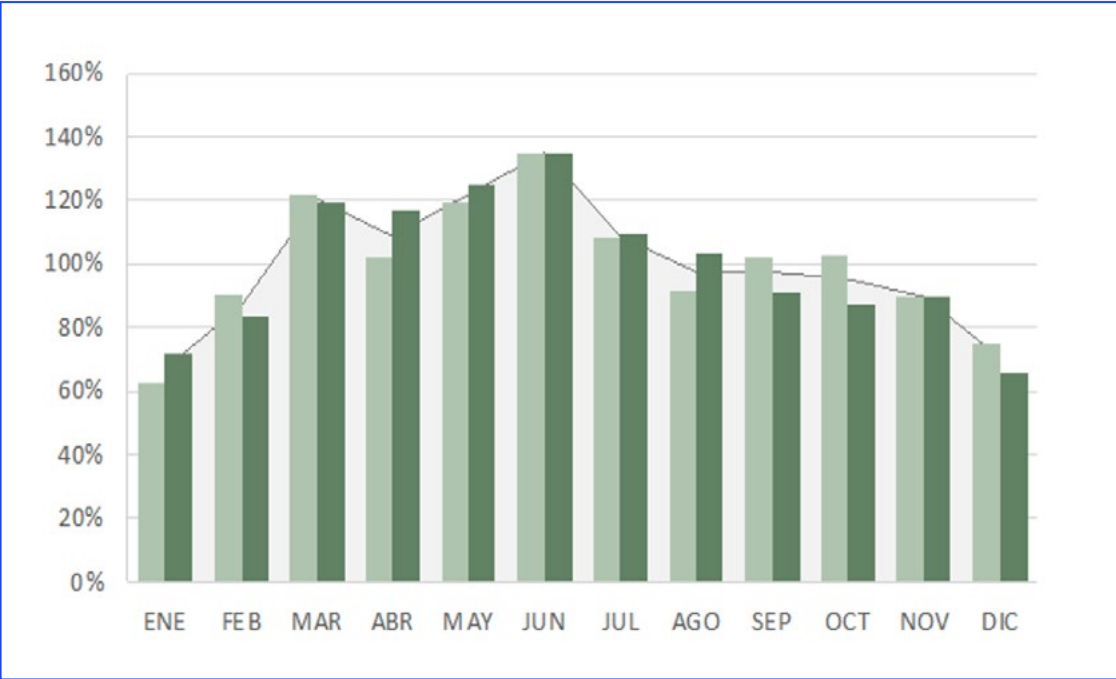
“Temporary contracts for core tourism activity continue to have a significant weight compared to the economy as a whole.”

Duration in contracts is a feature of interest that has undergone significant changes since the last labour reform. Despite the significant reductions in the weight that temporary contracts have in the total number of contracts registered in all sectors of activity, in the last year studied in this report, it can be observed that the percentage of temporary contracts in core tourism activity is higher than the same figure with reference to the entire economy of the city of Malaga in the

same year (see Figure 13), which is a characteristic of this market that deserves special attention.

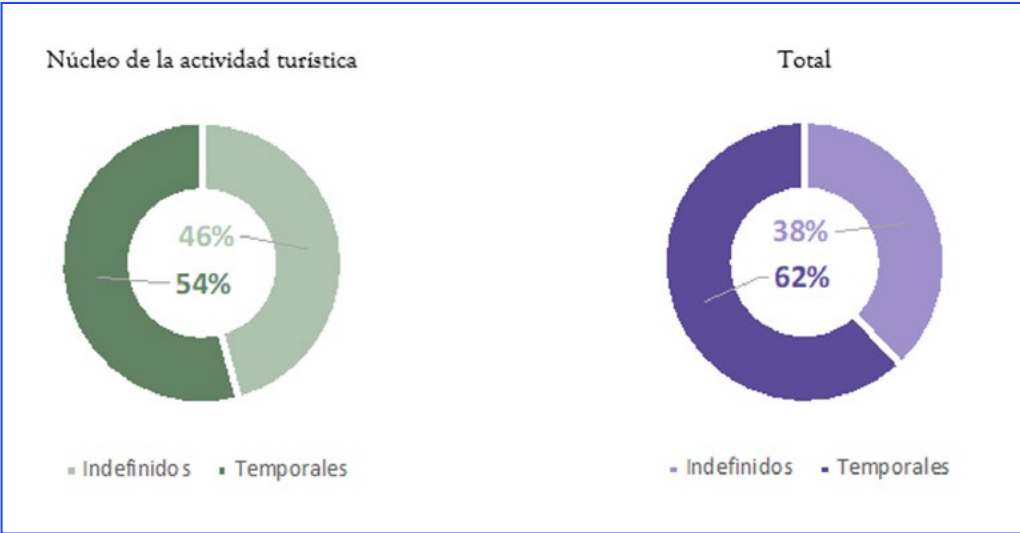
Lastly, the greater presence of women in contracts registered in core tourism activity is more pronounced in temporary contracts than in permanent ones, with 53.6% of the total of these contracts corresponding to the female group (see Figure 14).

Figure 12: Seasonal pattern of contracts for core tourism activity in Malaga (2022)



Fuente: Elaboración propia a partir del INE.

Figure 13: Duration of contracts in Malaga (2022)



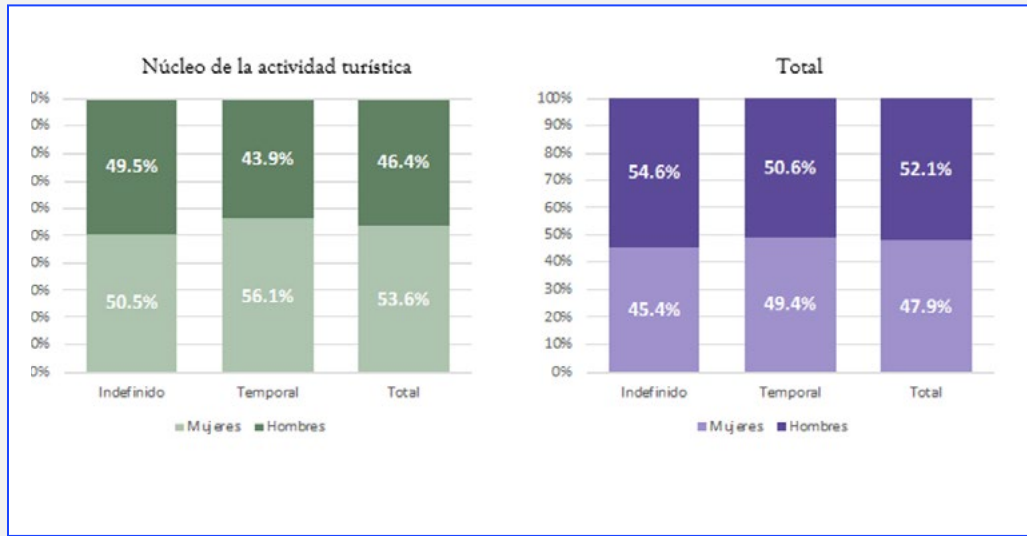
Source: Compiled by author based on data from SEPE

Table 2. Contracts registered in core tourism activity (by gender) and in all economic activity in Malaga

Contracts					Year-on-year growth rate					Growth rate compared to 2019				
	Total	Women	Men	Total economy		Total	Women	Men	Total economy		Total	Women	Men	Total economy
2019	72,198	36,421	35,777	329,424	2019					2019				
2020	28,769	14,677	14,092	216,822	2020	-60.15%	-59.70%	-60.61%	-34.18%	2020	-60.2%	-59.7%	-60.6%	-34.2%
2021	46,832	24,192	22,640	296,796	2021	62.79%	64.83%	60.66%	36.88%	2021	-35.1%	-33.6%	-36.7%	-9.9%
2022	51,938	27,813	24,125	294,815	2022	10.90%	14.97%	6.56%	-0.67%	2022	-28.1%	-23.6%	-32.6%	-10.5%

Source: Compiled by author based on data from SEPE

Figure 14: Contracts for core tourism activity by type and gender Malaga (2022)



Source: Compiled by author based on data from SEPE

“The dynamics of contracts for core tourism activities shows a clear seasonal behaviour, higher than that of the city’s economy as a whole.”



05.

Conclusions

Employment in tourism activities has a significant weight in the city of Malaga, with participation in the local economy as a whole higher than that observed, in general terms, in the Andalusian or national sphere (an average of 14.1% in 2022, which is higher than the Andalusian and national values estimated by Turespaña).

However, if this figure is compared with that of the province of Malaga, we find that overall in the province of Malaga, employment in tourism activities reaches 18.4% of the total of the province.

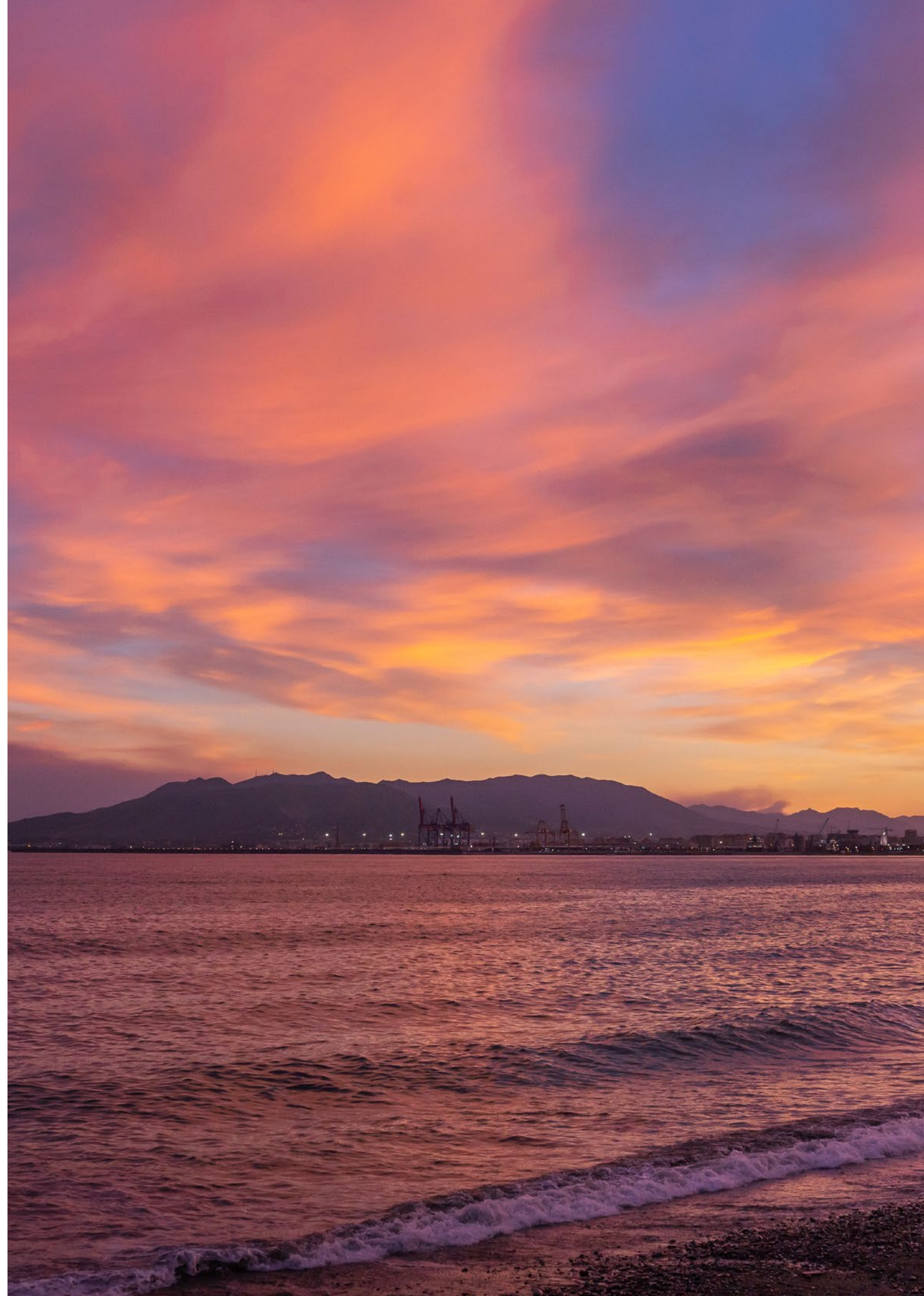
In the distribution by branches of activity, catering is stable with just over 50% of the total, with the other branches with the greatest presence being tourism transport, leisure and accommodation.

The recent evolution of tourism employment in the city shows a recovery after the crisis caused by the pandemic which in 2022 had managed to recover the levels of 2019, showing more dynamic behaviour than that of employment in the total economy of the city, which in 2022 had not yet returned to pre-pandemic levels.

Recent behaviour has varied, with accommodation being the branch with the highest post-2020 growth rates. The INE estimates of occupancy in hotel establishments and holiday apartments show a stronger recovery than that recorded in the province, in Andalusia and in Spain.

Seasonality is a characteristic that accompanies tourism employment in the city. The numbers of contracts in core tourism activity show seasonality rates higher than those of the INE, which show reduced seasonality, lower than that seen in the province of Málaga, Andalusia or the country as a whole.

The dynamics of contracts in core tourism activity in the city also flag up a gender difference in some areas, such as a higher percentage presence of women in temporary contracts in 2022 (which is not observed in the local economy as a whole). In this regard, it should also be mentioned that seasonality is more present in contracts in tourism than in the local economy as a whole, despite recent legislative changes in labour affairs, with an average of 46% of contracts in 2022, compared to 38% in the city as a whole.





<https://sto.malaga.eu/indicadores/empleo/>