



Sustainable Tourism Observatory of Málaga

Mobility



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Context

Mobility in Malaga is a multidimensional phenomenon, deeply rooted in the geographical layout and socio-economic dynamics of the city.

Geographically speaking, Malaga is one of the most important urban agglomerations on the Spanish Mediterranean coastline, located in the centre of the Costa del Sol, with a marked influence on the nearby municipalities (Torremolinos, Benalmádena, Rincón de la Victoria, etc.).

This has led to the development of an extensive network of transport infrastructures that has placed Malaga at the forefront of mobility due to the excellent economic benefits of its highly favourable location, thanks to its municipal, regional, national and international connections. Mobility in Malaga is also marked by a growing concern for sustainability.

In line with national and regional policies, Malaga faces the challenge of balancing tourism growth and demand with the need to cut CO2 emissions and promote a transition to more sustainable forms of transport. Mobility in Malaga is not only a reflection of its urban and economic growth, but also of the way it has been shaped by its role as one of the leading tourist destinations on the Mediterranean.

02.

Targets

- To install equipment that promotes sustainable mobility in holiday accommodation (e.g. providing charging points for electric vehicles, making 1 or 2 (electric) bicycles available to users).
- “Sustainable decentralisation of tourism in the city of Malaga” by creating sustainable routes that redirect tourist flows from the crowded central area of the city to the surrounding neighbourhoods, indirectly encouraging the use of active and/or electric mobility among visitors to the destination.
- To reduce car dependency by encouraging the use of sustainable modes of transport - pedestrian mobility, cycling, public transport.
- To establish agreements with local companies that promote the use of electric and/or sustainable vehicles (electric rental cars, tourist routes with soft or electric mobility vehicles, etc.).
- To recover public space for the use and enjoyment of citizens and visitors.
- To expand the range of mobility services between the port and the city, offering efficient and sustainable mobility systems.
- To use big data tools that make it possible to visualise and analyse mobility using sensors or automation technologies to identify tourist flows and congested areas.

Results

Malaga currently has an outstanding transport infrastructure, spearheaded by the third largest airport on the peninsula, a well-connected railway station, a cruise terminal that is continually expanding and a highly developed network of internal and external roads. This network makes it the main gateway to the Costa del Sol and other areas of Andalusia.

Mobility in Malaga: By air

Air traffic at Malaga–Costa del Sol Airport

In 2022, Malaga-Costa del Sol Airport had established connections to 144 different destinations through 53 airlines. Of the 256 total routes offered, 35 are domestic and 221 are international, covering 36 countries. France tops this list with 49 routes, followed by the UK with 45. Germany and Italy have 39 and 34 routes respectively, and the United States offers 28. These five countries account for a significant proportion of the airport's international connections, underlining its importance in both European and transatlantic air traffic.

Additionally, looking at operations by airline, it is clear that Ryanair dominates international routes with 4,466,00 passengers, along with 742,000 passengers on domestic routes in 2022, while Vueling covers more domestic routes, with 1,548,000 passengers. EasyJet also has a strong presence on international routes with 1,939,000 passengers. The other airlines, such as Norwegian, Jet2.com, Transavia Holland and Wizz Air, are mostly concentrated in international routes. These figures highlight the dynamism and diversity of operations at Malaga-Costa del Sol Airport, reflecting its key role as the gateway to Andalusia from the rest of the world.



Malaga-Costa del Sol Airport arrival figures

“In 2023, Malaga-Costa del Sol Airport contributed a total of €10,173,022.45 in property tax on airport facilities.”

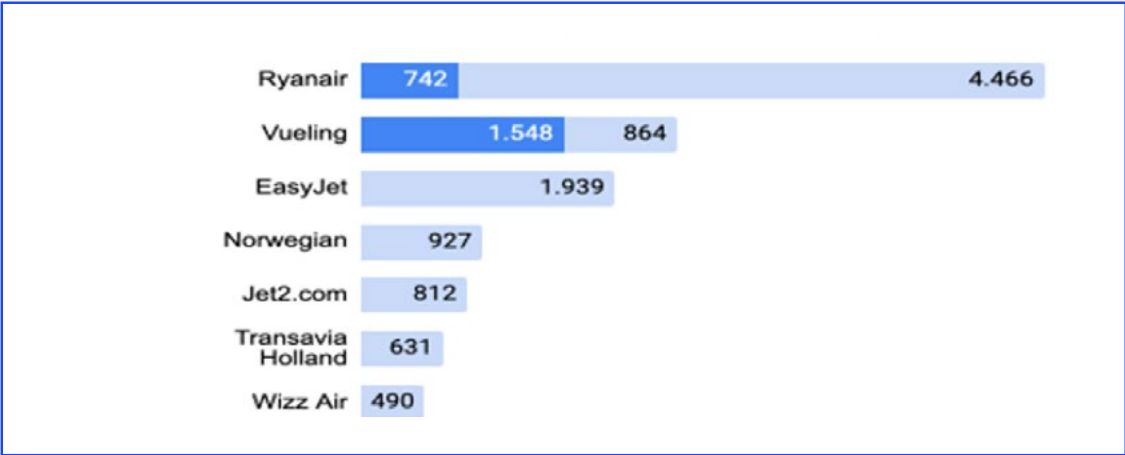
Malaga-Costa del Sol airport, which in 2023 contributed a total of €10,173,022.45 in property tax on airport facilities, has experienced significant fluctuations in passenger traffic over the years. After a period of continuous expansion that peaked in 2017, the facility experienced a slowdown in growth, a likely sign of

the market reaching maturity before the arrival of the pandemic. This global event bucked the trend by causing an unprecedented 74% decline in 2020, reducing the figure to 5.2 million passengers, reflecting the restrictions imposed by the global pandemic and its impact on international mobility.

The response to the health crisis in 2021 marked the beginning of a remarkable recovery, with a significant rise in passenger numbers resulting in a 72% increase. In 2022, the airport experienced an even more dramatic surge, rising by more than 100%, taking passenger numbers to around 18.5 million, a figure that is close to pre-pandemic levels and highlights Malaga’s ability to recover and effectively attract visitors again. In addition, it is planning to build on this growth with an expansion of the T3 terminal.

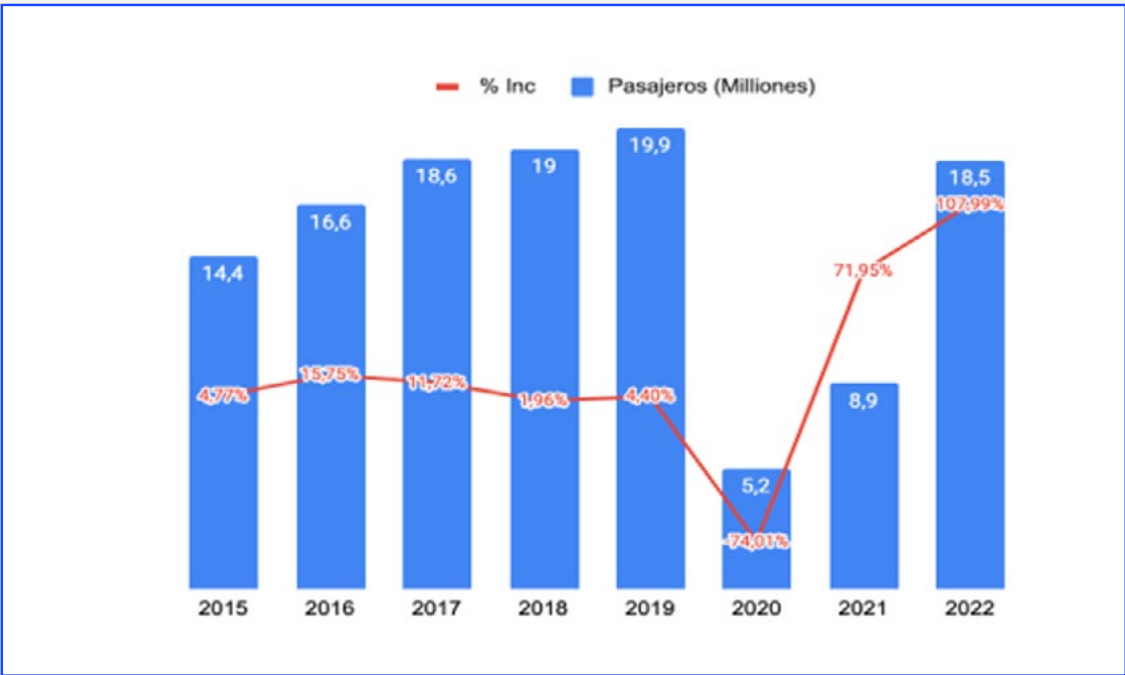
These fluctuations in passenger numbers reflect the challenges faced by the airport industry and the interdependence between tourism, the economy and air transport. These figures show that Malaga-Costa del Sol Airport serves as a barometer of wider trends in air and tourist mobility, while highlighting its strategic importance in the region.

Figure 1: Main airlines at Malaga-Costa del Sol Airport in 2022



Source: Compiled by author based on data from AENA

Figure 2: Passenger traffic at Malaga-Costa del Sol Airport 2015-2022



Source: Compiled by author based on data from AENA

Passenger profile

The profile of passengers transiting through Malaga-Costa del Sol Airport indicates a significant concentration in the central age groups, with a notable presence of adults and young people. These passengers, probably visiting for tourism and business purposes, form the core of air traffic, while the older age groups and the under-15s represent smaller segments, logically reflecting travel patterns that are influenced by factors such as active retirement and school holidays. These trends highlight opportunities for services and marketing focused on the needs and preferences of these predominant age groups.

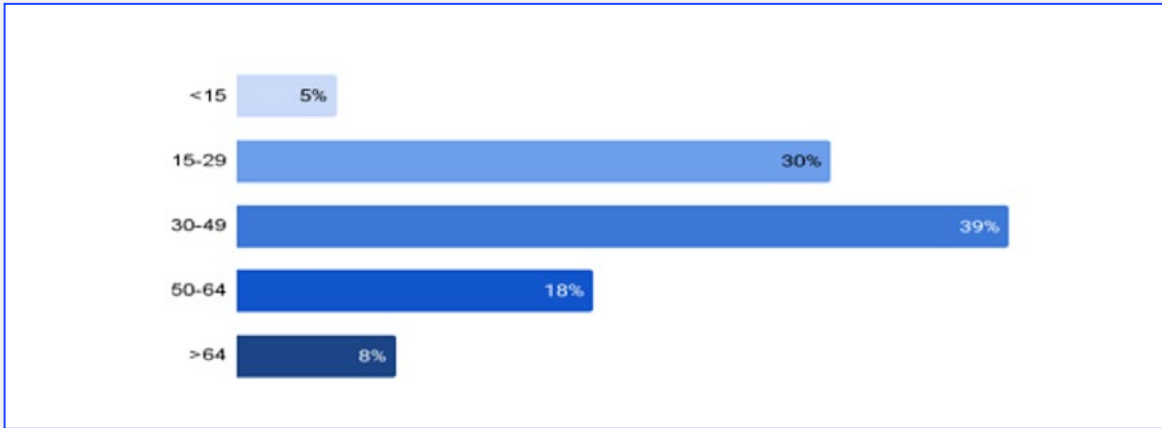
Port of Malaga cruise ship arrival figures

“In 2022, there were 266 cruise ships and 340,725 passengers.”

There have been significant changes in the number of cruise ships entering the port of Malaga in recent years. On analysing trends from 2015 to 2022, we have identified notable variations in the number of cruise ships and total passengers.

The upward trend up to 2019 suggests a strong period for maritime tourism. However, the sharp fall to 19 cruise ships in 2020 reflects the devastating blow that the pandemic dealt to the sector, bringing the flow of these large ships and their passengers to a virtual standstill. In 2022, 266 cruise ships were recorded with an impressive 340,725 passengers, not only signalling adaptability and the resumption of operations, but also a revival of confidence and interest in cruise tourism. Although not yet matching pre-pandemic figures, this upturn is a clear sign of the port’s resilience and its importance on the Mediterranean cruise route. In terms of seasonality, the months of October and November are the busiest periods, coinciding with highly popular cruise routes in the Mediterranean. This time of year is often chosen by cruise lines to launch some of their most attractive routes, taking advantage of the region’s pleasant weather and culturally rich destinations, helping to ensure a steady flow of maritime tourists.

Figure 3: Percentage distribution of passengers by age range at Malaga Airport 2022



Source: Compiled by author based on data from AENA

Table 1: Passenger traffic on cruise ships at the port of Malaga 2015-2022

TRÁFICO DE PASAJEROS							VAR. 2022/2021	CUOTA 2021
2015	2016	2018	2019	2020	2021	2022		
17.667	13.959	9.431	13.869	15.407	-	5.567	-59,9%	1,6%
14.271	4.577	12.052	11.314	9.543	-	1.776	-84,3%	0,5%
21.471	17.735	32.917	28.846	15.222	-	9.441	-67,3%	2,8%
52.331	68.668	83.655	61.624	-	-	32.383	-47,5%	9,5%
33.154	65.351	43.983	65.460	-	-	32.446	-50,4%	9,5%
31.572	31.685	27.486	17.891	-	2.073	16.690	-6,7%	4,9%
39.204	36.102	28.142	17.191	-	4.337	32.817	90,9%	9,6%
37.420	52.009	30.817	22.949	-	4.849	26.253	14,4%	7,7%
51.623	58.852	57.954	44.128	-	18.368	30.901	-30,0%	9,0%
67.717	84.688	101.067	90.667	-	47.404	66.295	-26,9%	19,4%
61.128	55.485	59.930	86.164	-	32.675	69.364	-19,5%	10,3%
16.128	21.571	21.191	16.051	-	8.599	18.083	12,7%	5,3%
443.686	510.682	508.625	476.154	40.172	118.305	342.016	-28,17%	100%

Source: Costa del Sol Tourism Observatory

Railway traffic at María Zambrano Malaga Station

Total no. of passengers from Madrid

“EIn 2022, the Madrid-Malaga AVE line reached 918,147 passengers and 886,500 on the Seville-Cordoba-Malaga line.”

Since 2015, the AVE line connecting Madrid and Malaga has been growing steadily. This upward trend, which peaked in 2019, was abruptly halted in 2020 due to the pandemic, which caused a dramatic fall in train use. However, the resilience of this route has become apparent in recent years. Following the impact of the health crisis, a remarkable recovery has been observed, returning passenger figures to levels close to where they stood in 2018, although not yet reaching the peaks of 2019.

This recovery highlights the importance of the route for tourism and business, although the challenges of the pandemic underlined the vulnerability of inter-city mobility. This recent positive response reflects the adaptability and sustained demand for fast and efficient travel between these two key cities, with passenger numbers reaching 630,597 in 2021 and 918,147 in 2022. Thus, after overcoming a period of unprecedented decline, the Madrid-Malaga AVE line is showing encouraging signs of a return to normality, reflecting both improved conditions and restored confidence in high-speed travel.

Analysis of rail traffic on Malaga’s key routes

The number of passengers on the Seville-Cordoba-Malaga route increased significantly, standing at 886,500 in 2022 vs 538,600 in 2021. This represents an increase of 64.6%. Additionally, there was notable growth in passengers on the Malaga-Granada line, reaching 103,500 in 2022, reflecting the emergence of this newly launched route over the last year. This growth is remarkable and suggests latent demand. Both routes illustrate the momentum and growth of rail traffic in Malaga.

Figure 5: AVE Madrid-Malaga passenger arrival figures 2016-2022



Fuente: Observatorio turístico costa del sol

Figure 6: Comparison of passengers on rail routes 2021-2022



Fuente: Informe anual de Renfe 2022

Urban mobility in the city of Malaga

Passenger figures on public transport - buses/metro

“In 2019 the total number of bus passengers was 39,570,000 and 6,700,279 passengers used the metro.”

There has been a surge in the use of public transport in Malaga over the last few years. The number of bus passengers rose to 39,570,000 in 2019. Currently, Empresa Malagueña de Transportes (EMT) operates 51 urban routes, special services to the Andalusia Technology Park, the port and the airport, as well as 2 tourist routes and 5-night services. It also provides specific services for events and festivities, serving over 2.5 million passengers monthly.

Regarding the metro line, there has been a substantial increase in passengers since 2015. With 4,999,528 passengers in that year, the number rose to 6,700,279 in 2019, representing growth of 134%. These figures reflect the growing trend of people choosing sustainable means of transport. A preference for public transport strengthens social cohesion, promotes balanced territorial development and supports urban sustainability initiatives. Choosing public transport benefits the environment by minimising the consumption of energy and resources, while at the same time reclaiming space for pedestrians.

There is a notable difference in gender distribution in the use of bus transport in Malaga. Women accounted for 63.5% of users in 2018, while men made up 36.5%. This suggests that women in Malaga are more dependent on public transport by bus. This disparity may be due to a variety of socio-economic or cultural factors and highlights the importance of tailoring transport policies and services to the specific needs of both genders.

Table 2: Growth of passengers on buses 1995 – 2022

Growth of passengers	
No. of bus passengers 2019 - total	39,570,000
Percentage of bus passengers 2019 - pensioners	1.5%
Growth of bus passengers (base 100)	112.83
No. of metro passengers 2015	4,999,528
No. of metro passengers 2019	6,700,279
Growth of metro passengers (base 100)	134.02

Source: Compiled by author based on data from the Urban Agenda.

Table 3: Gender distribution of EMT passengers in Malaga (2018-2019)

EMT passengers by gender	
No. of bus passengers 2019 - total	25,826,629
Percentage of bus passengers 2018 - men	36.5%
Percentage of bus passengers 2018 - women	63.5%

Source: Compiled by author based on data from the Urban Agenda, 2022 indicators

Connectivity and mobility preferences in Malaga: From arrival to exploring inland

Modes of transport used to get to Malaga

Malaga is a hub of connectivity and transport. Air travel emerged as the predominant mode of transport used by visitors to reach Malaga in 2022, accounting for an impressive 63.9% of the total. This figure underlines the importance of the airport and incoming flights for the influx of tourists to the city. After air travel, the train is the second most popular mode of transport (11.6%), demonstrating a robust rail network that connects Malaga with other parts of Spain. Personal vehicles (9.9%) and other means such as coaches, car sharing, car rentals and cruises are also well represented, albeit to a lesser extent.

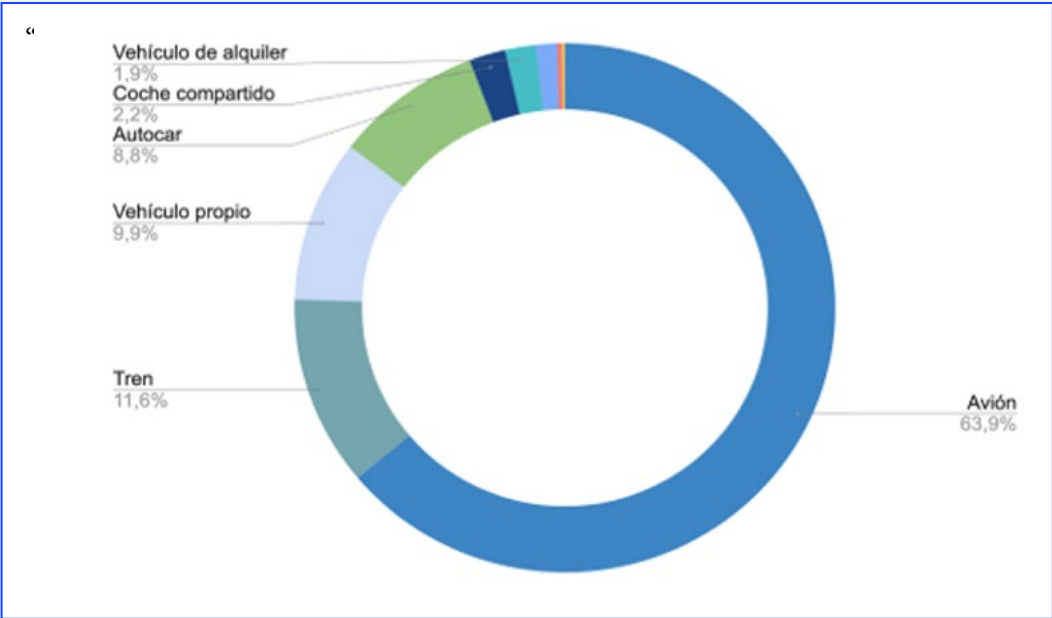
Movilidad Interna y elección de itinerarios en Málaga

Once in Malaga, the transport picture changes slightly. The overwhelming preference of visitors is to use their own vehicles as their main means of transport. This suggests a desire for independence and autonomy during their stay, and the lack of public transport connectivity in many municipalities, both coastal and inland.

Car rentals are also gaining ground, suggesting that many tourists prefer the flexibility of having their own means of transport. While modes of transport such as buses and taxis at the destination have a moderate uptake, others, such as trains, are less popular for travel within the city. Surprisingly, there is a segment of visitors who choose not to use any mode of transport in the destination, probably due to the proximity of tourist attractions or their choice of centrally located accommodation.

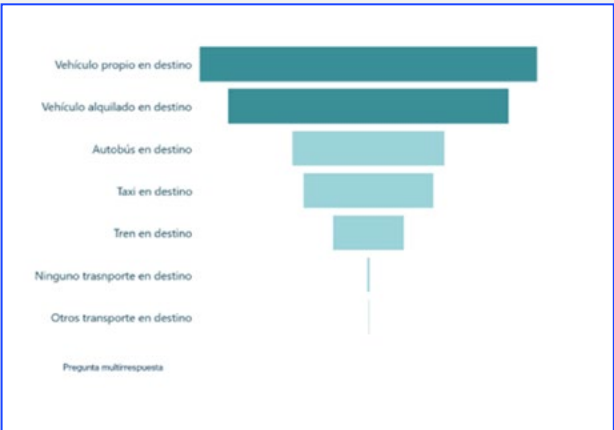
In terms of the chosen itineraries, the city of Malaga is clearly not only a destination in its own right, but also part of a wider journey for many. Approximately half of visitors choose to stay in Malaga alone, while a slight majority are attracted by an itinerary that covers several cities. This not only marks Malaga as a major tourist destination, but also underlines its value as a starting point or part of a broader itinerary that includes other destinations in the region.

Figure 7: Percentage distribution of modes of transport used to get to Malaga 2022



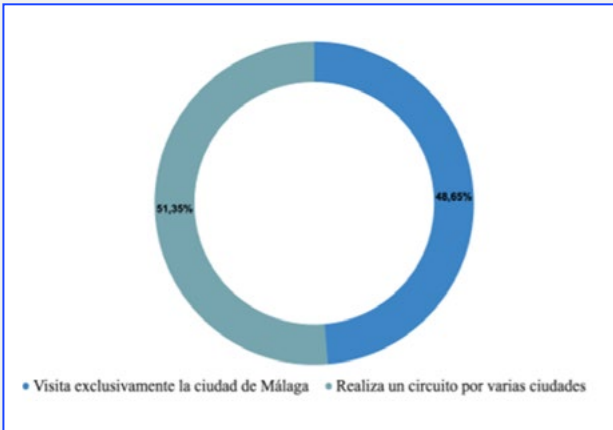
Source: Costa del Sol Tourism Observatory

Figure 8: Most frequently used modes of transport to get around Malaga 2022



Source: Costa del Sol Tourism Observatory

Figure 9: Breakdown of visitor itineraries 2022



Source: Costa del Sol Tourism Observatory

Conclusions

Malaga's transport infrastructure has proved resilient to recent challenges, with a rapid recovery in air and maritime traffic.

"Malaga's transport infrastructure has proved resilient to recent challenges, with a rapid recovery in air traffic and a commitment to sustainable urban mobility."

Passenger numbers have recovered at Malaga-Costa del Sol Airport, with a network covering key destinations in Europe and beyond. In the port, the number of cruise ships and passengers is on a clear upward trend, highlighting the importance of the autumn months for cruise tourism.

In rail, demand is rising on the main routes, reflecting improvements in the service and a latent demand that is being met. In turn, urban mobility continues to grow stronger, with a rise in the use of public transport, signalling a preference for more sustainable alternatives.

Altogether, these elements form a dynamic mobility ecosystem that is recovering, making Malaga a strategic travel hub and top tourist destination. Adapting to changing circumstances and travel habits, the city continues to demonstrate its ability to attract and serve a large number of business and leisure travellers.



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