



Sustainable Tourism Observatory of Malaga

Tourism offer



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“In 2022, a total of 8,854 tourist establishments were registered in the municipality of Malaga, with 62,976 beds.”

Context

There has been a boom in the city of Malaga’s tourism offer over the last twenty years.

This period has been characterised by the growth and positioning of different segments of tourism, most notably cultural tourism, MICE, sporting tourism and cruises. This growth is reflected in several indicators, with the most significant in recent years (2017-2022) being the increase in tourist accommodation, which has had a significant impact on the local economy.

One clear example of its success is the city’s tourism offer for events and meetings, which has made Malaga a leading destination for a variety of international cultural and professional activities. Alongside these tangible tourist attractions there are also intangible ones, with an identity and image being built around Picasso. In short, there has been a major boom in the city of Malaga’s tourism offer, which has adapted to the changing demands of visitors and established itself as a leading destination in the south of Europe.

02.

Targets

- To raise the profile of the circular tourism offer by developing a range of tourism experiences.
- To strengthen resources that support linear and sustainable development and are capable of reshaping the tourism offer.
- To refurbish the tourist office in Plaza de la Marina and upgrade its technology.
- To improve museum sites and other cultural facilities.
- To improve the signs and digitalisation of tourist routes.

Results

Breakdown of accommodation offer

The total number of tourist establishments registered in the municipality of Malaga (table 1) in 2022 was 8,854, with 62,976 beds.

Holiday accommodation is the most common type, with a 65.8% share of the accommodation on offer, with a total of 8,370 properties and 41,440 beds. As far as the non-hotel offer is concerned, holiday apartments are also highly prominent, with 9.98% of the total, i.e. 6,286 beds and 221 establishments.

It is also worth highlighting the number of hotel establishments, accounting for 17.90% of the total, with a total of 11,274 beds and 88 establishments. Within this offer, there is a significant proportion of high-quality accommodation (4- and 5-star hotels) available, accounting for more than 10% of the total. Rural guest houses and campsites account for a minimal share of the total supply, since the main draw of the destination is its sun, beaches and city life.

Trends in the accommodation offer

The 2017-2022 period was chosen to examine trends in the different types of accommodation on offer, as no figures were recorded for holiday accommodation prior to 2017.

The total number of beds rose by 118.11% between 2017 and 2022 (Figure 1), illustrating Malaga's ability to attract investment in its tourism offer, with a 6.72% increase in the number of beds at the height of the pandemic (20-21) and a 14.8% increase during the recovery period (2021-22) (table 2).



“The growth in the supply is driven by an increase in high-end hotels and holiday accommodation.”

dation since 2018, peaking at 94.4% in 2022. It is this type of accommodation that also experienced the highest growth in the period (2017-2022) increasing by 223.42%. It is worth noting the 70.12% increase in holiday apartments.

Lastly, there was more moderate growth for hotels (20.87%) and for hostels and guest houses (22.3%) (Figure 2). If we analyse hotels in greater detail, the largest increases in beds with respect to 2017 occurred in 4- and 5-star hotels, rising by 28.72% and 32.91% respectively.

Qualitatively, this substantial increase in accommodation is strongly marked by new high-quality hotels (4 and 5 stars), but quantitatively by holiday accommodation, which has accounted for more than 90% of all tourist accommodation since 2018, peaking at 94.4% in 2022. It is this type of accommodation that also experienced the highest growth in the period (2017-2022) increasing by 223.42%. It is worth noting the 70.12% increase in holiday apartments. Lastly, there was more moderate growth for hotels (20.87%) and for hostels and guest houses (22.3%) (Figure 2). If we analyse hotels in greater detail, the largest increases in beds with respect to 2017 occurred in 4- and 5-star hotels, rising by 28.72% and 32.91% respectively.

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Table 1. Breakdown of accommodation offer 2022

	Beds		
	No. of establishments	No. of beds	Share
Hotel establishment	88	11,274	17.90%
1-star	7	170	0.27%
2-star	19	1,388	2.20%
3-star	27	2,824	4.48%
4-star	31	5,939	9.43%
5-star	4	953	1.51%
Hotel accommodation - Guest house	87	3,208	5.09%
1-star hostel	14	765	1.21%
2-star hostel	10	726	1.15%
Guest house	63	1,720	2.73%
Holiday apartment	221	6,286	9.98%
First (3 and 4 keys)	12	446	0.71%
Second	124	3,520	5.59%
Third (1 key)	85	2,320	3.68%
Rural guest house	43	448	0.71%
Basic rural guest house	40	359	0.57%
Superior rural guest house	9	89	0.14%
Rural holiday accommodation	43	320	65.80%
Holiday accommodation	8370	41,440	%
Tourist campsite	2	-	-
TOTAL	8854	62,976	

Source: Tourism Observatory of the city of Malaga

Table 2. Year-on-year percentage changes (2017-2022)

	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022
No. of beds	39.56%	19.44%	6.79%	6.72%	14.80%

Source: Compiled by author based on information from the Tourism Observatory of the city of Malaga.

Occupancy rates

“Holiday accommodation is the most common type, with a 65.8% share of the offer.”

The occupancy rate of holiday accommodation during the period between January and December 2022 increased in the summer months, peaking at 82.2% in August. The lowest occupancy rate was in September (60.5%).

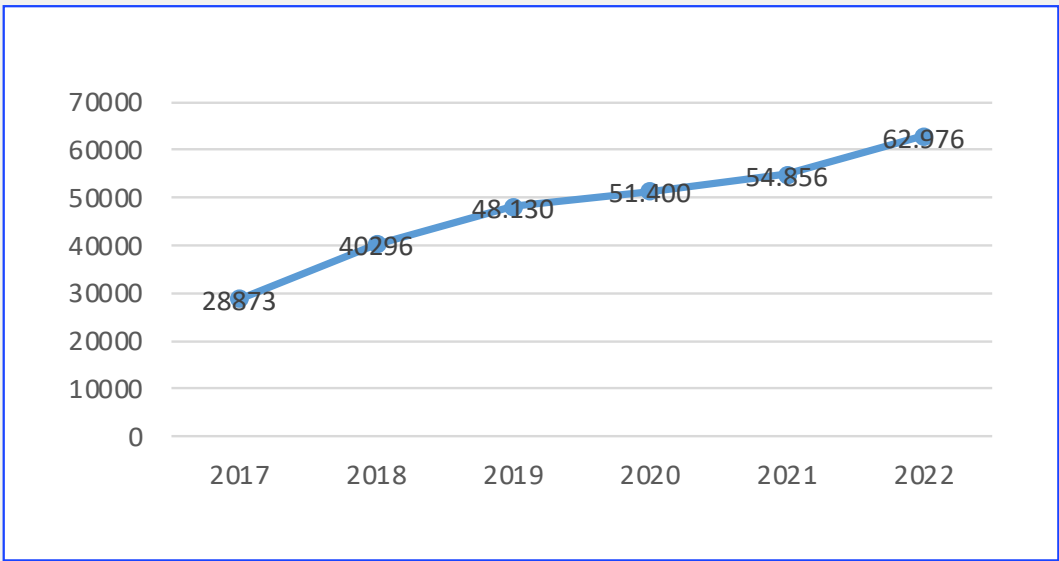
As far as hotel establishments are concerned, the occupancy rates were high in the summer months, peaking at 76.6% in August, in contrast to November, which had the lowest occupancy rate at 55.3%. However, occupancy rates in holiday accommodation and holiday apartments were more consistent throughout the year. In 2022, occupancy rates in holiday apartments were high in August (57.1%). However, the lowest occupancy rate was recorded in November (30.7%) (Figure 10).

Average stay

The most frequent length of stay is 4 to 8 days (55.30%), followed by stays of more than 9 days (30.69%), while the overall average stay is 7.89 days.

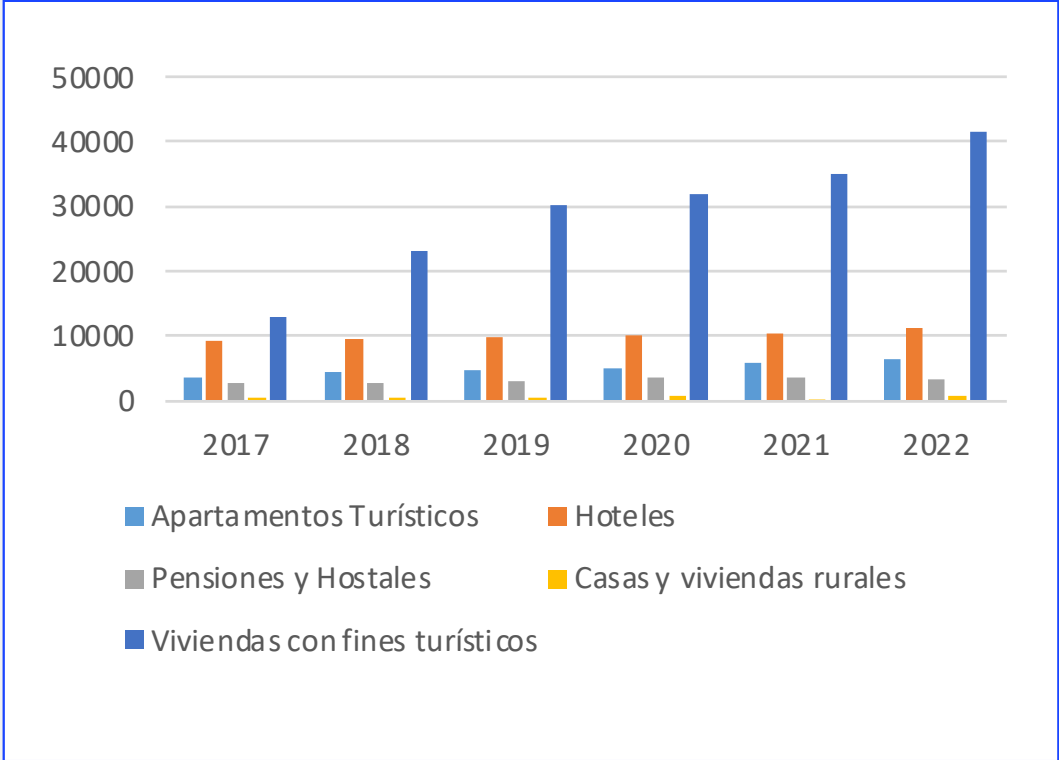
The average stay in hotels, hostels and guest houses was 6.78 days, in holiday accommodation it was 8.51 days and in holiday apartments it was 8.35 days.

Figure 1: Trend for bed numbers (2017-2022)



Source: Tourism Observatory of the city of Malaga

Figure 2: Trend for bed numbers by type of accommodation (2017-2022)



Source: Tourism Observatory of the city of Malaga

ADR (Average Daily Rate)

“The average stay for all accommodation is 7.89 days.”

As regards the figures for the average daily rate for holiday accommodation, in 2022, the highest rate recorded was in November, when it was 181.27 euros, and the lowest rate was in May, when it was 104.93 euros.

However, seasonality in rates is observed during the summer months. The rates increased in the autumn and winter months, unlike in May and June.

Likewise, with respect to the average daily rate (ADR) in hotels, in 2022, the highest rates were observed in August, when they reached 139.57 euros, and in February, the lowest rate was recorded, at 92.61 euros.

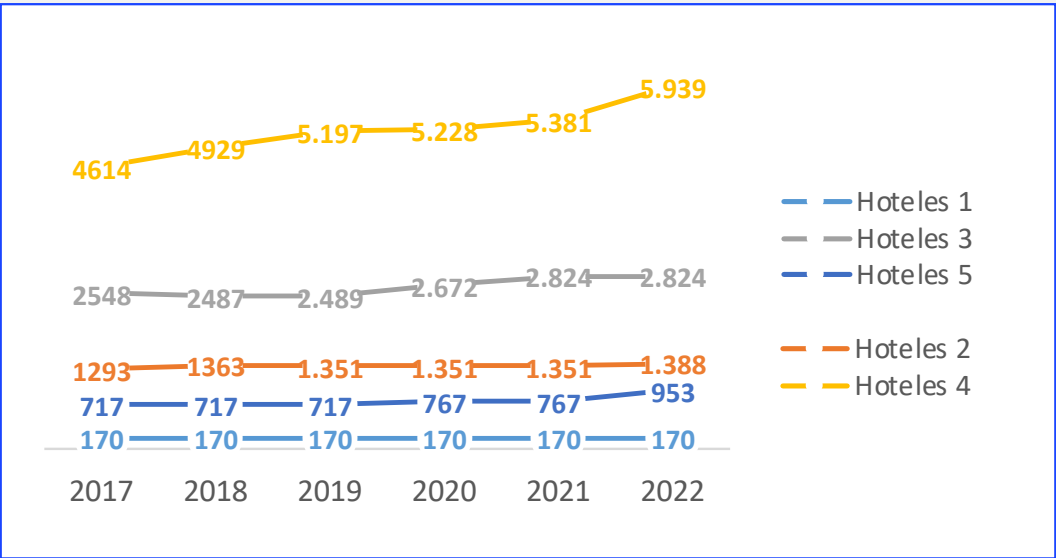
This graph shows that, in most months, hotel rates are higher than in holiday accommodation, with the exception of November, where the rate for holiday accommodation is significantly higher than the ADR for hotels (Figure 6).

The city’s cultural and leisure offer

With a wide range of products on offer, the city has managed to develop and position itself around four key pillars: culture, congresses, languages and cruises. Additionally, its competitive edge in the following areas has been strengthened in recent years: Health and wellness, food and wine, shopping, industry and technology. More recently, as seen in the new tourism development plan, the city is focusing even more on enhancing its reputation in the areas of accessibility, nature, film, golf, luxury and family leisure.

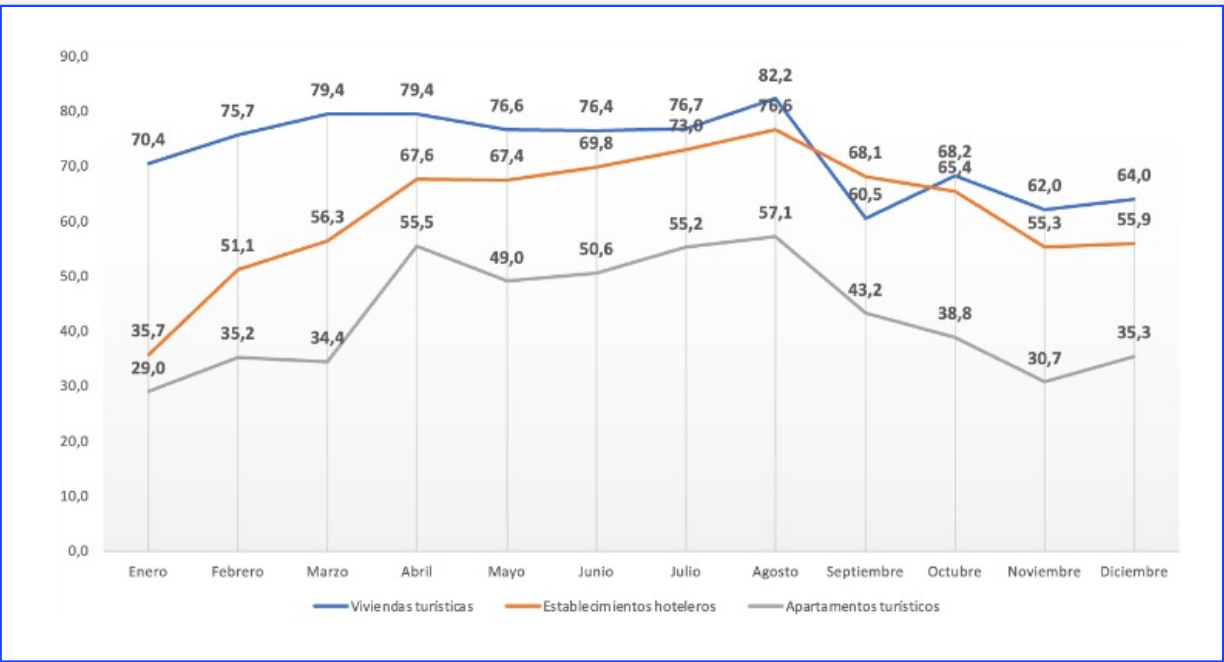
The city of Malaga has 55 monuments and tourist attractions, 40 museums, 18 galleries and 7 gastronomic zones. This illustrates the great cultural offer that the city has. The most visited museums and monuments include Malaga Cathedral, followed by the Malaga Picasso Museum, the Alcazaba and Gibralfaro. Furthermore, they happen to be the first monuments that are visited during visits to the city. In terms of the most popular activities carried out by tourists in Malaga, culinary activities (27.06%), sightseeing in the city (25.17%) and sun and beach activities (22.73%) were the most popular .

Figure 3: Trend for bed numbers by hotel star rating (2017-2022)



Source: Tourism Observatory of the city of Malaga

Figure 4: Occupancy rates 2022



Source: Compiled by author based on the records of Turismo y Planificación Costa del Sol and the INE (Spanish National Statistics Institute)

This varied cultural offer requires tourism companies to market it. The Regional Government of Andalusia’s tourism register lists a total of 142 travel agencies, 45 intermediary operations (AIAT), 1 ecological tourism company, 63 active tourism companies and 56 restaurant and catering tourism companies in the city of Malaga in 2023. It also has 4 tourist offices, which are available to inform tourists about the resources and events taking place in the city.

Events

There was a marked increase in the number of events held in the city of Malaga between 2015 and 2019, with the number of events registered in those years rising from 126 to 305, a 142% increase. However, in 2020, due to pandemic restrictions, there was a sharp fall on the previous year to 129 events.

Nevertheless, in 2022, the number of registered events rose sharply (by 157%) compared to 2021, when 171 events were registered. These figures signal a marked increase in the attendance of events (Figure 8).

These figures are matched by the number of participants in these events, whose indicators follow a similar upward trend from 2015 to 2019. However, in 2022, there was an exponential increase to 118,151 registered participants (Figure 9).

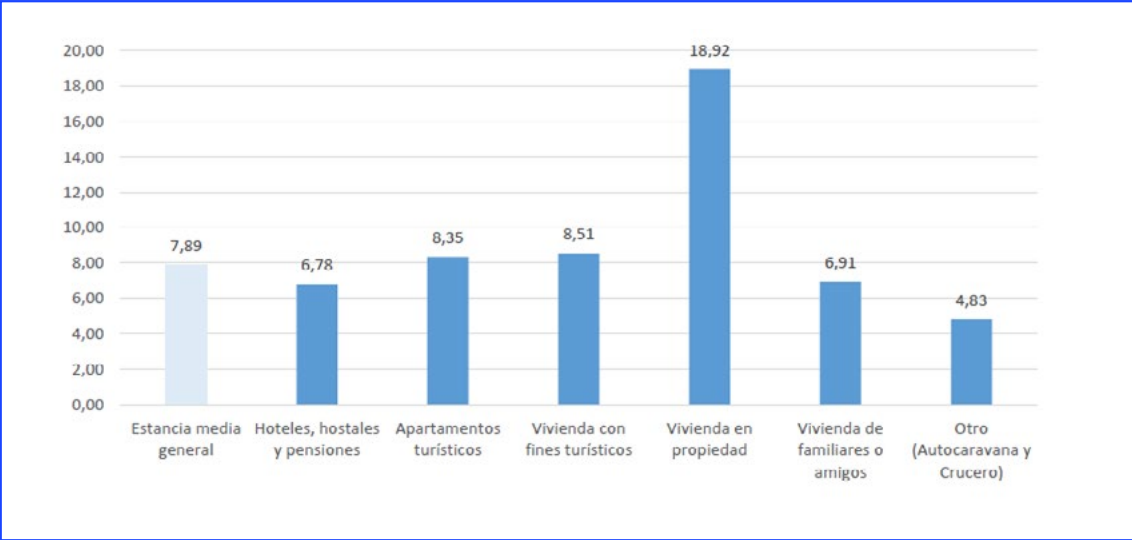
Total surface area of pedestrian zones

The pedestrian zones in the city of Malaga cover an area of 144 km, according to the Urban Agenda (indicator 30), addressing the need to promote pedestrian mobility as the main mode of transport in the city.

Likewise, the measures put in place by the Department of Mobility to promote pedestrian mobility include the implementation of 20 km/h and 30 km/h zones, making it possible to create an environment that improves the quality of life of citizens and road safety, reducing vehicle traffic and the negative impact of traffic.

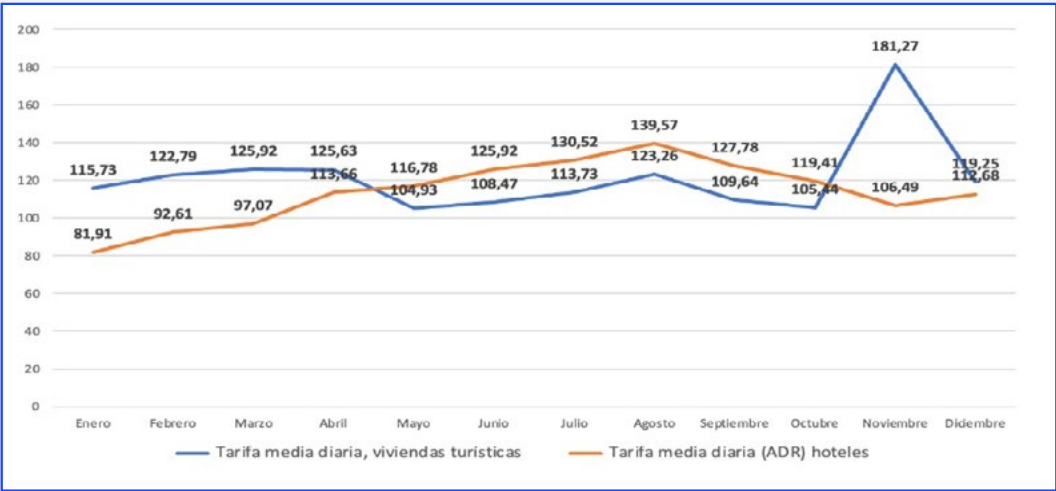
One of the best practices has been the conversion of a large area of Malaga’s historic centre into a “Living Centre”, in which pedestrians are prioritised.

Figure 5: Average stay by type of accommodation 2022



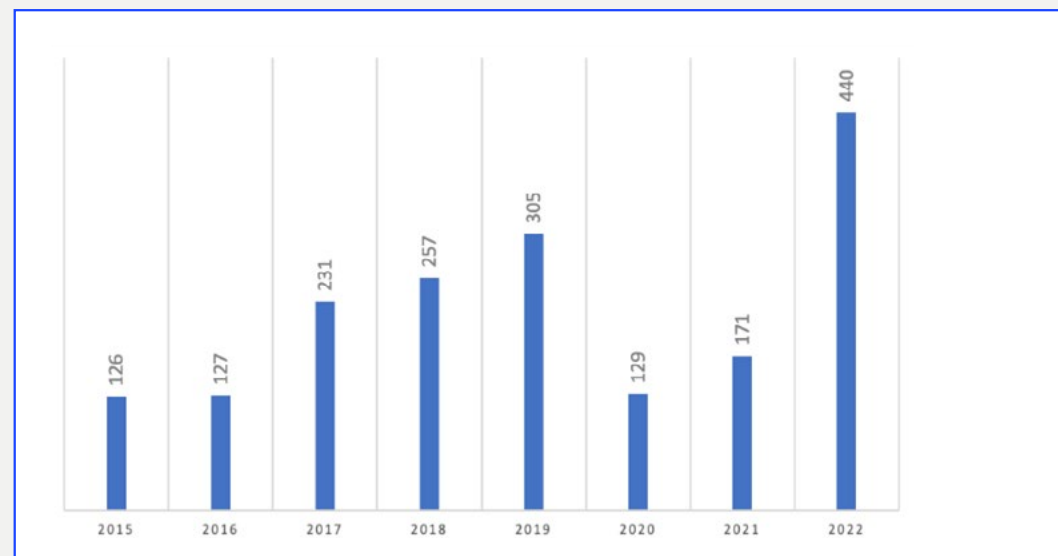
Source: Tourism Observatory of the City of Malaga

Figure 6: Average daily rate for holiday accommodation and hotels, 2022



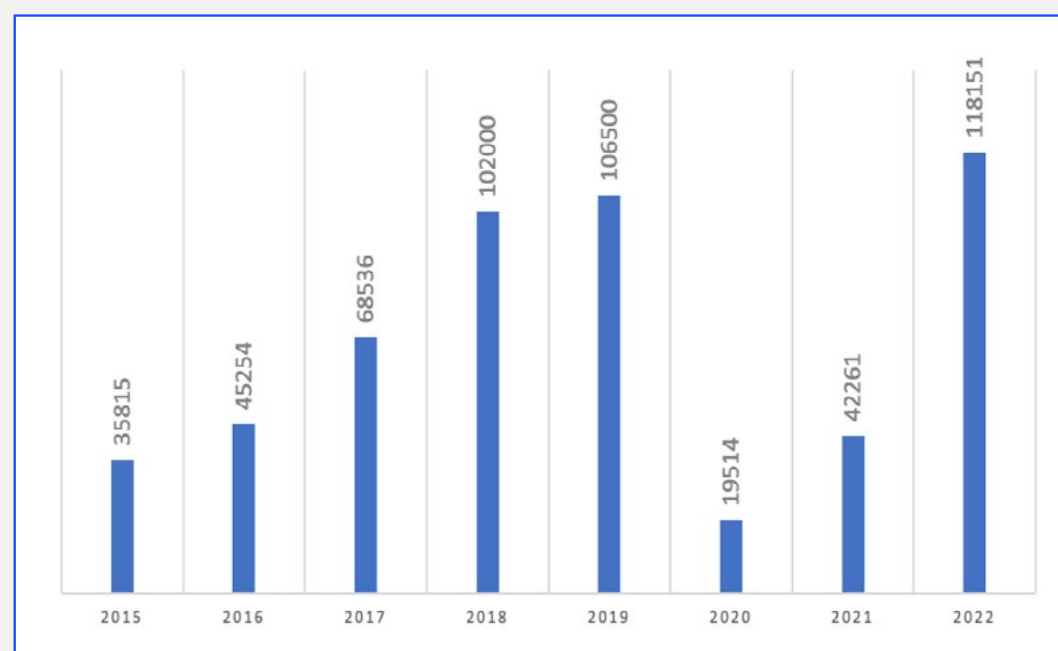
Source: Compiled by author based on the records of Turismo y Planificación Costa del Sol and the INE (Spanish National Statistics Institute)

Figure 7: Number of events held in the city of Malaga between 2015 and 2022



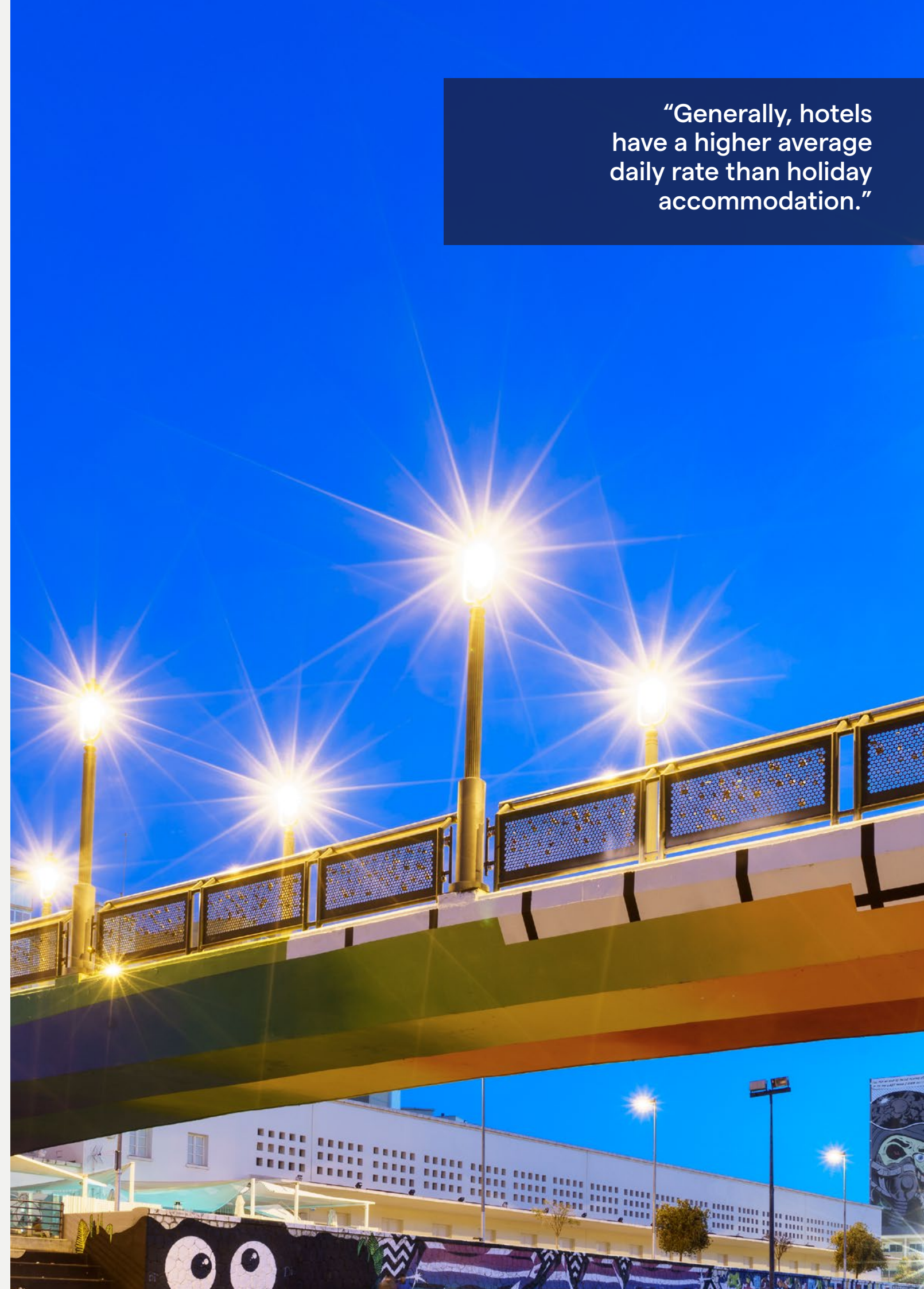
Source: Compiled by author based on information from the Malaga Convention Bureau and the CIEDES Foundation

Figure 8: Number of participants in events held in the city of Malaga, from 2015 to 2022



Source: Compiled by author based on information from the Malaga Convention Bureau and the CIEDES Foundation

“Generally, hotels have a higher average daily rate than holiday accommodation.”



“The exponential growth of holiday accommodation may become unsustainable.”

Conclusions

Overall, Malaga’s accommodation offer has developed strongly, adapting to the current circumstances in the tourism sector through an increase in the supply of hotel accommodation, a key aspect that illustrates the dynamism and adaptability of the tourism industry.

“The accommodation offer is growing with a focus on quality. The number of events is also increasing, highlighting Malaga’s prominence as a MICE tourism destination.”

Additionally, there have been significant changes in the distribution of hotel star ratings, with an increase in the number of 4- and 5-star hotels, signalling a shift towards higher-end accommodation.

However, as far as holiday accommodation is concerned, the growth is unsustainable. This merits greater attention and we would encourage seeking alternative solutions to the current situation.

Regarding the average length of stays, the seasonality of hotels is notably lower than that of holiday apartments and accommodation. Increasing average hotel stays could lead to an increase in tourism expenditure. Therefore, continuing to promote its cultural offer, as it is doing now, may help to achieve this.

Finally, regarding events and their participants in the city of Malaga, there has been an increase in the number of events held, rising by 157% between 2021 and 2022. As a result of this increase, the number of attendees has also increased significantly, reflecting the city of Malaga’s commitment to event tourism.



<https://sto.malaga.eu/indicadores/oferta-turistica/>