



Sustainable Tourism Observatory of Malaga

Local and tourist satisfaction



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Context

Analysing well-being and satisfaction in urban settings and among tourists has been a recurring topic of interest in research.

In the case of Malaga, a city with a growing tourism profile, it is essential to understand how the quality of life of its residents and the experiences of tourists affect each other.

Various studies have explored how cultural tourism can impact on residents' perceptions of their city, while other research has examined the well-being of communities in tourism destinations. These perspectives are important for understanding Malaga, where tourism plays a significant role in urban dynamics.

The real estate market also plays a crucial role in perceived quality of life, especially in cities with a high influx of tourists, such as Malaga.

Interactions between tourism and the real estate market can have both positive and negative consequences for local residents. Moreover, the cultural and leisure offer is a decisive factor in attracting tourists and the satisfaction of local residents. Thus, the city is faced with the challenge of preserving its cultural heritage while embracing the economic opportunities that tourism brings, seeking a balance that respects both the people who call it their home and admiring visitors.

02.

Targets

- To improve citizens' perception of tourism by promoting programmes to raise awareness of the importance of tourism for local residents, and by implementing measures to prevent touristification and to promote the integration of tourism and social life.





Results

Analysis of the local perception of the city of Malaga

Regular monitoring of local satisfaction

In its efforts to improve and optimise the lives of its citizens, the city of Malaga has implemented feedback mechanisms that allow it to understand the perceptions and needs of its residents.

*“Tourism is mostly seen as positive by citizens, (74.76%) who believe it has a **beneficial impact**, largely due to its role in **creating jobs** and as a **key economic driver** in 2022.”*

One of these mechanisms is the annual citizen satisfaction survey, conducted by the City Council and published on its website. This tool collects opinions from a representative sample of local residents of Malaga, covering key issues such as public services, cleanliness, safety, and cultural and leisure offers. The frequency and transparency of this process re-

fects the City Council’s commitment to adopt measures based on citizens’ perspectives, thus ensuring that municipal management is aligned with the expectations and demands of the population.

Citizen perception of municipal life

Among citizens, satisfaction with living in the municipality has been positive and risen steadily over the years. In 2020, the degree of satisfaction scored 7.71 (out of a maximum of 10 points), decreasing slightly to 7.61 in 2021, and then recovering to 7.7 in 2022. These figures reflect a favourable opinion among citizens, albeit without achieving an excellent rating (9-10). However, it is important to consider certain aspects that may be partly responsible for the failure to reach such levels. The areas of opportunity identified include aspects such as cleanliness, especially waste collection, mobility and traffic, and parking availability.

Therefore, tourism is mostly seen as positive by citizens, with almost three quarters (74.76%) stating that it has a beneficial impact, largely due to its role in creating jobs and as a key economic driver. However, 15.17% report negative impacts, especially on the residents’ ability to enjoy their own city and price rises. These results highlight the importance of well-balanced tourism that benefits both visitors and residents, ensuring sustainability and quality of life in urban areas.

Strategic measures to boost tourism in Malaga based on the perceptions of citizens

To improve the tourist experience in Malaga and ensure that both visitors and residents alike reap its benefits, it is essential to heed the recommendations of citizens. In particular, improving public service infrastructures ranks highest, with a significant score of 21.5%. This illustrates the importance of efficient and robust public services to support tourism growth. In second place, with 12.3%, is the desire to increase tourism marketing activities, suggesting a need to promote Malaga more effectively at home and abroad.

Figure 1: Strategic priorities for optimising tourism 2022



Source: Compiled by author based on data from the following study: Tourism for residents of Malaga by Turismo y Planificación Costa del Sol

Table 1: Degree of satisfaction with living in Malaga 2020-2022

Year	Average happiness score (0-10)
2020	7.71
2021	7.61
2022	7.7

Source: CISA (Centre for Applied Social Research) study no. 0006-2022

“Improving public service infrastructures ranked highest among citizens as a measure to boost tourism, scoring 21.5% in 2022.”

Other key areas include improving the quality of the tourism offer (11.6%), strengthening the cultural activities on offer (9.2%) and improving the cleanliness of city centres and beaches (9.1%). These areas highlight the importance of delivering high-quality visitor experiences and ensuring

that they see Malaga at its best. In short, to maximise Malaga’s tourism potential, it is vital that development strategies are aligned with the perceptions and needs of its inhabitants. These recommendations provide a clear roadmap on the areas that must be prioritised.

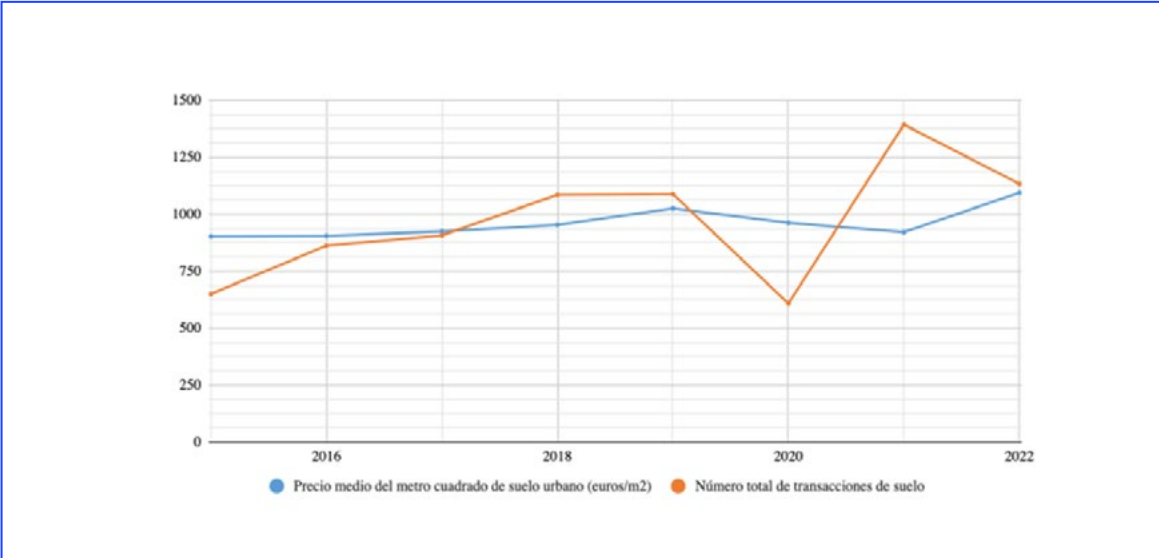
Table 2 shows how tourism is perceived according to the district in which the respondent lives. Residents who live in districts where the municipality’s most touristy areas are concentrated (Centre (D1), Malaga East (D2) and Carretera Cadiz (D7)) have a more negative opinion of tourism than in other areas of the city where there is no tourist development or where they are further away from the historic centre, such as Campanillas, Puerto de la Torre, Teatinos-University and Palma-Palmilla. It is also striking that the neighbourhood with the most negative opinion of tourism is the Churriana district. This district is predominantly residential, without a notable tourism offer, but it does contain the airport and is very close to other municipalities on the Costa del Sol. Therefore, there may be some link between place of residence and residents’ negative perceptions of tourists.

Analysis of the real estate market in Malaga: trends in housing prices and urban land transactions (2015-2022)

Housing prices in the city of Malaga

The value of housing in the city of Malaga has fluctuated significantly in recent years. According to the Tinsa IMIE Local Markets index, there has recently been a 7.4% year-on-year increase in the cost per square metre, bringing the average price to 2002 euros/m².

Figure 2: Trends in the total number of transactions and average price per square metre of urban land in Malaga (2015-2022)



Source: Compiled by author based on data from the Ministry of Transport, Mobility and Urban Environment Observatory (OMAU)

Table 2: Perception of tourism by district 2023

District	Positive (%)	Negative (%)	No answer (%)
D1	73.88	18.26	7.86
D2	78.91	11.87	9.22
D3	73.16	9.9	16.94
D4	69.88	12.5	17.62
D5	87.8	7.13	5.07
D6	82.35	14.06	3.59
D7	78.1	16.05	5.85
D8	60.53	39.47	0
D9	82.62	0	17.38
D10	75.91	0	24.09
D11	73.94	7.37	18.69

Source: Malaga City Council. OMNIBUS survey

Despite this rise, it should be noted that there is still an aggregate decline of 17.4% compared to the historical peak reached in Malaga. However, the current indicators are promising. In the third quarter of 2022, the city witnessed an increase of 5.4% on the same period in the previous year. This positive trend surpasses the 4.5% increase recorded at the same time in 2021, suggesting a gradual strengthening of the local real estate market.

Trends in urban land prices and transactions in Malaga (2015-2022)

“Residents who live in districts where the municipality’s most touristy areas are concentrated (Centre (D1), Malaga East (D2) and Carretera Cádiz (D7)) have a more negative opinion of tourism than in other areas of the city.”

There have been significant fluctuations in the land market in Malaga over the last decade. If we analyse the trend over the years, we can observe fluctuations in both the average price per square metre of urban land and in the number of transactions.

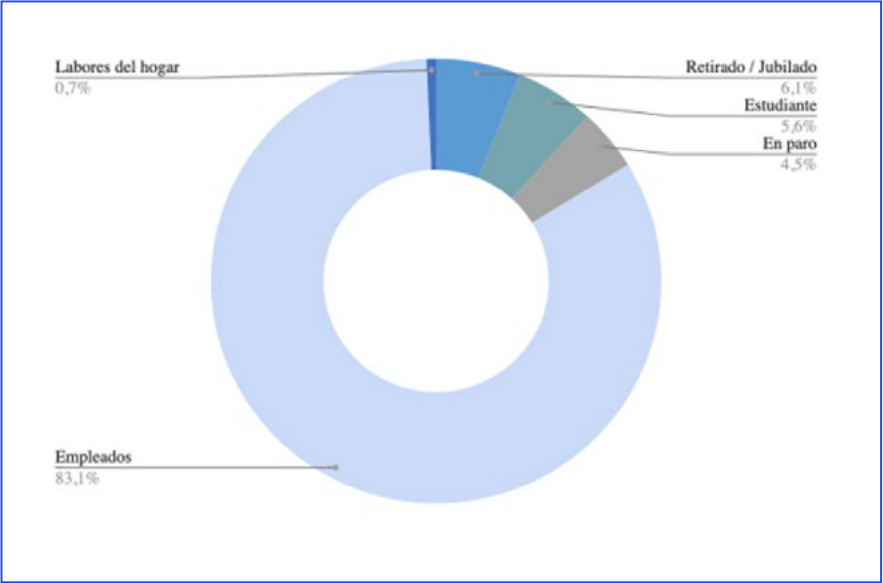
In terms of prices, there was a steady increase from 2015 (903 euros/m²) to 2019 (1,025 euros/m²), with the latter year marking the peak for the period in question. However, in 2020, a drop in

prices was recorded (962 euros/m²), driven by external factors such as the global health crisis. Despite this, subsequent years showed signs of recovery, with the price reaching 1094 euros/m² in 2022.

In terms of total number of transactions, 2021 stands out considerably with a total of 1,393 sales, the busiest year since 2015. Although there was a slight decrease in 2022 with 1,133 transactions, this is still a remarkably high figure compared to previous years, such as 2020, when only 608 transactions were recorded.

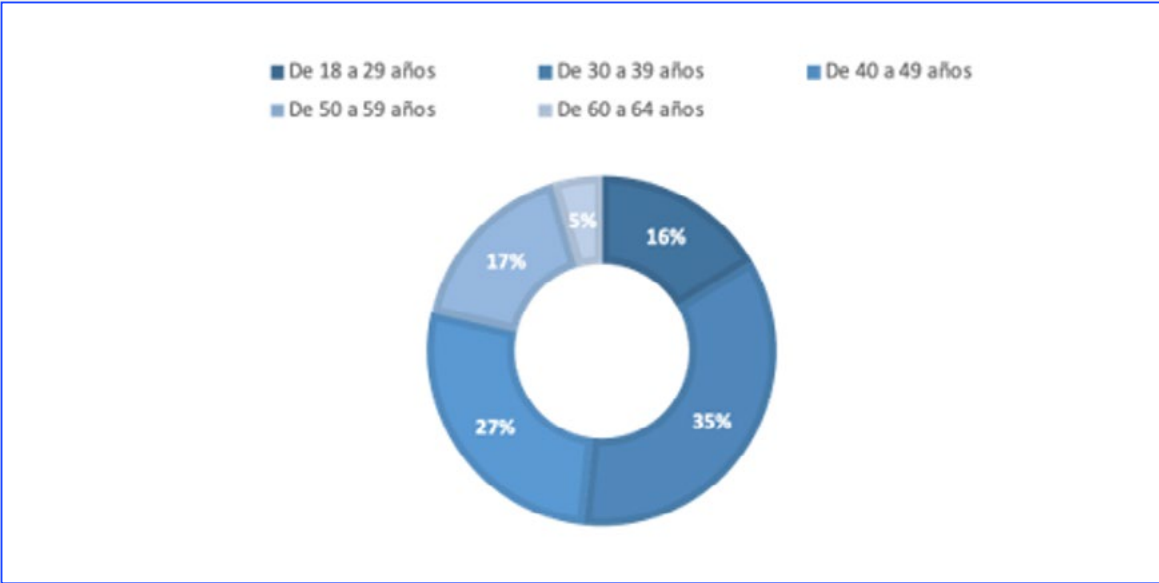
These figures suggest that Malaga’s land market has remained buoyant and is continuously adapting, reflecting the resilience and strength of its local economy.

Figure 3: Employment status of visitors to the city of Malaga 2022



Source: Tourism Observatory of the City of Malaga

Figure 4: Breakdown of age and gender of visitors to the city of Malaga 2022



Source: Tourism Observatory of the City of Malaga

Profile of tourists in the city of Malaga

Employment status

The employment status of tourists in the city of Malaga varies widely. The vast majority (83.1% of the total) are employed, suggesting that Malaga mainly attracts active professionals looking for a break from their daily routine. 6.1% are retired or pensioners, suggesting that Malaga’s wealth of culture and history and its pleasant climate are attractive to people at that stage of life. Students also see Malaga as an attractive destination, accounting for 5.6% of the total, which may reflect the popularity of the city for educational leisure trips or student holidays. Only 4.5% of tourists are unemployed, while a tiny 0.7% are homemakers.

Demographic profile

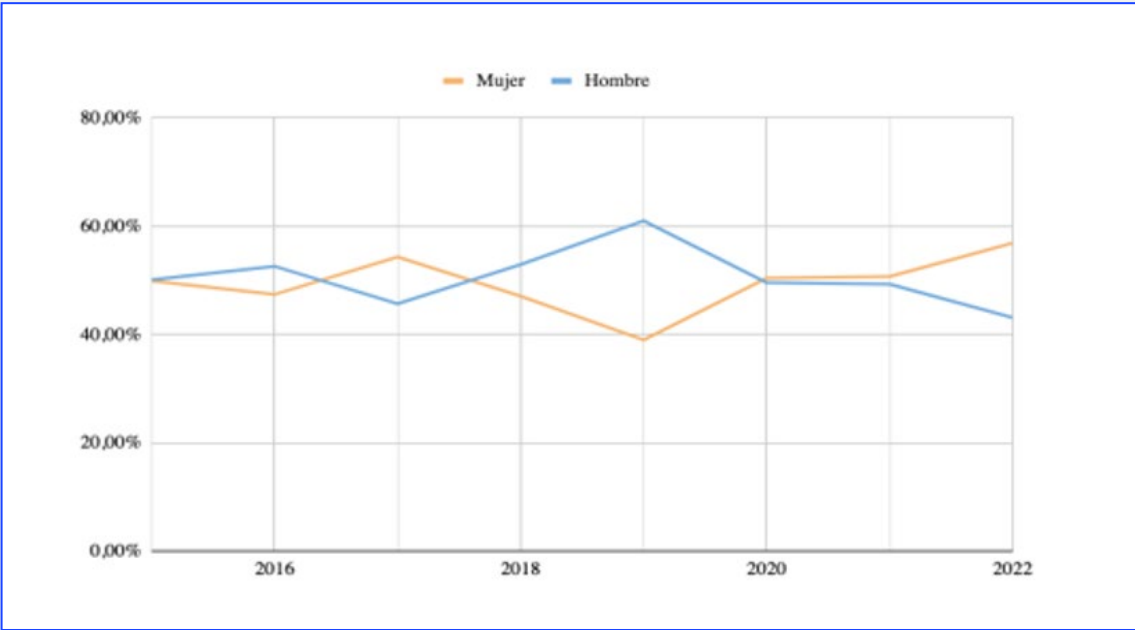
Primarily, Malaga attracts young and middle-aged adults, with a significant number of visitors between the ages of 30 and 49, highlighting its appeal to people in the active stages of their lives. 18-29 year olds are also an important group, although they do not account for the majority. Interest decreases gradually among older age groups, with a lower proportion of visitors over the age of 50. This demographic profile illustrates the fact that Malaga is most popular with young adults, while suggesting that there is potential for growth in the more mature tourist segment.

Evolución del perfil de género de los turistas en Málaga (2015-2022)

“63% of tourists rated their experience as very positive, while 32.7% rated it as positive, meaning that 95.7% of all tourists gave it a favourable rating in 2022.”

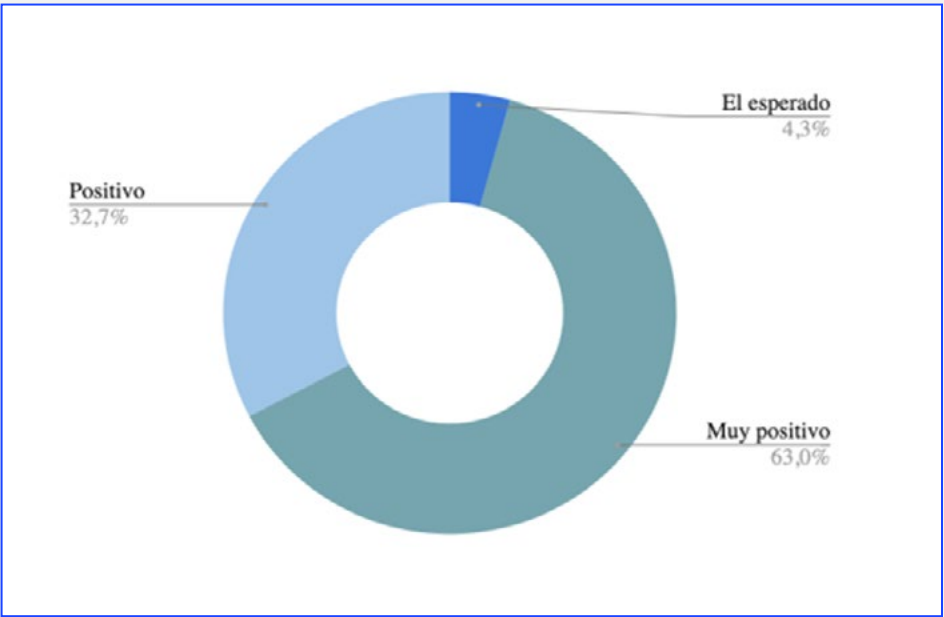
In recent years, there have been significant changes in the gender composition of visitors to the city of Malaga, reflecting variations and trends that could be indicative of wider cultural and tourism patterns. From near-perfect parity in 2015, the gender profile of tourists has fluctuated, with differences in some years leaning markedly towards one gender or the other.

Figure 5: Trend in the gender profiles of visitors to Malaga (2015-2022)



Source: Tourism Observatory of the City of Malaga

Figure 6: Satisfaction levels of visitors in Malaga 2022



Source: Tourism Observatory of the City of Malaga

2017 marked a milestone year with an increase in female tourism, with women accounting for more than 54% of visitors. This surge could be linked to specific factors that attracted this demographic segment to the city. Conversely, in 2019 this trend was reversed, with a predominance of male tourism, at over 61%. This trend could be related to one-off events that took place in the city or to changes in travel patterns that favoured men. From 2020 onwards, there has been an upward trend in the number of female tourists, peaking at 56.88% in 2022, highlighting the growing interest or predilection of women to choose Malaga as a tourism destination in recent years. These fluctuations in annual percentages suggest that various factors are at play, ranging from tourism marketing campaigns to cultural and economic events that may have had a gender-specific appeal. This volatility in the gender distribution of visitors reflects the dynamic nature of tourism and potentially the socio-cultural trends affecting travel decisions globally.

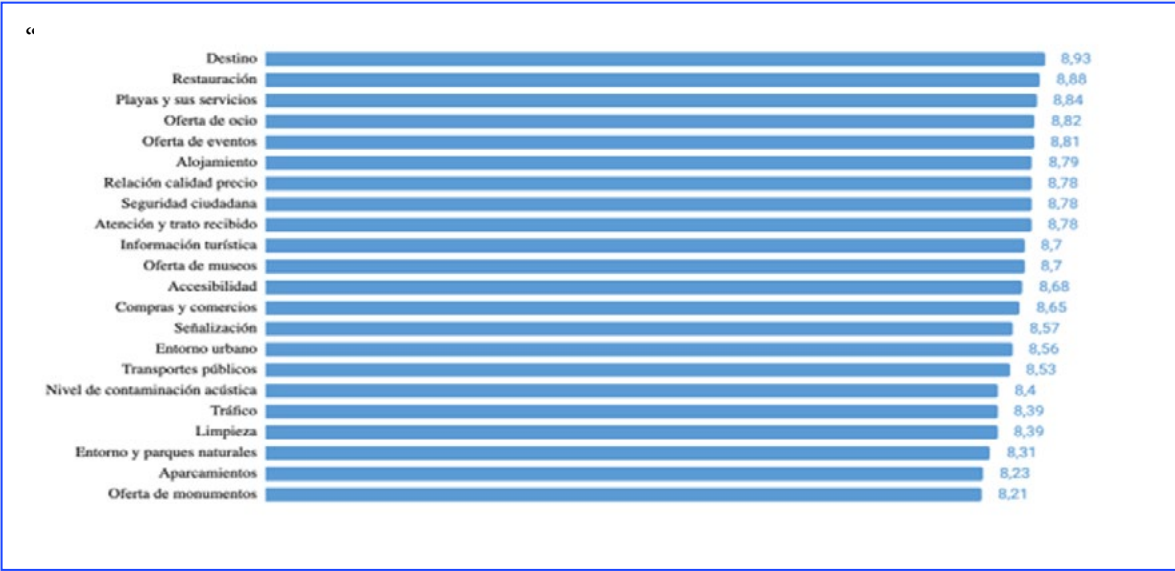
Tourists’ perceptions of the city of Malaga

Tourists’ overall perception of the city of Malaga was remarkably positive in 2022. A significant majority of visitors had an outstanding experience. 63% of tourists rated their experience as very positive, while 32.7% rated it as positive, meaning that 95.7% of all tourists had favourable perceptions. However, a minority of 4.3% of visitors rated their stay in Malaga simply as “as expected”, suggesting that, for the vast majority, Malaga exceeded their expectations.

In order to further examine this satisfaction data, we have highlighted the aspects that are most important for visitors to Malaga. These specific elements play a crucial role in the overall tourist experience and are a reflection of the city’s priorities and efforts to offer the best to its visitors.

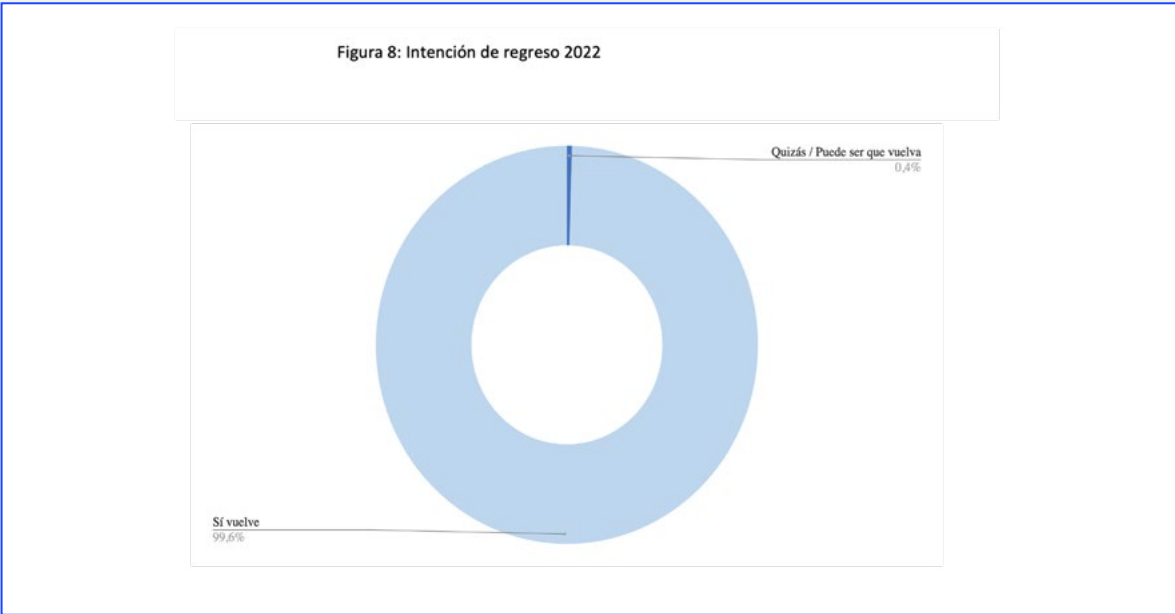
An analysis of tourist perceptions of Malaga reveals that the city has a very positive image. Visitors rank Malaga highest for its overall attractiveness as a destination, reflecting an all-round exceptional tourism experience. The variety and quality of its local cuisine has a significant impact on visitor satisfaction, making the catering industry one of the cornerstones of Malaga’s tourism offer. Furthermore, beaches and their facilities ranked highly, which is not surprising given the city’s coastal setting. Cultural events and leisure offerings are also rated very positively, showing that Malaga is capable of attracting the interest and enthusiasm of its visitors away from its sunny shores.

Figure 7: Visitors’ perceptions of various aspects of the city of Malaga 2022



Source: Compiled by author based on data from the Tourism Observatory of the city of Malaga 2022

Figure 8: Intention to return 2022



Source: Tourism Observatory of the City of Malaga

While the ratings for monuments and parking indicate that these areas could benefit from further attention to improve the overall experience, even these lower-rated areas receive scores that suggest a broadly positive perception. Overall, tourists see Malaga as a lively and welcoming city that meets and exceeds their expectations in many key areas of the tourist experience.

Loyalty and recommendation intention

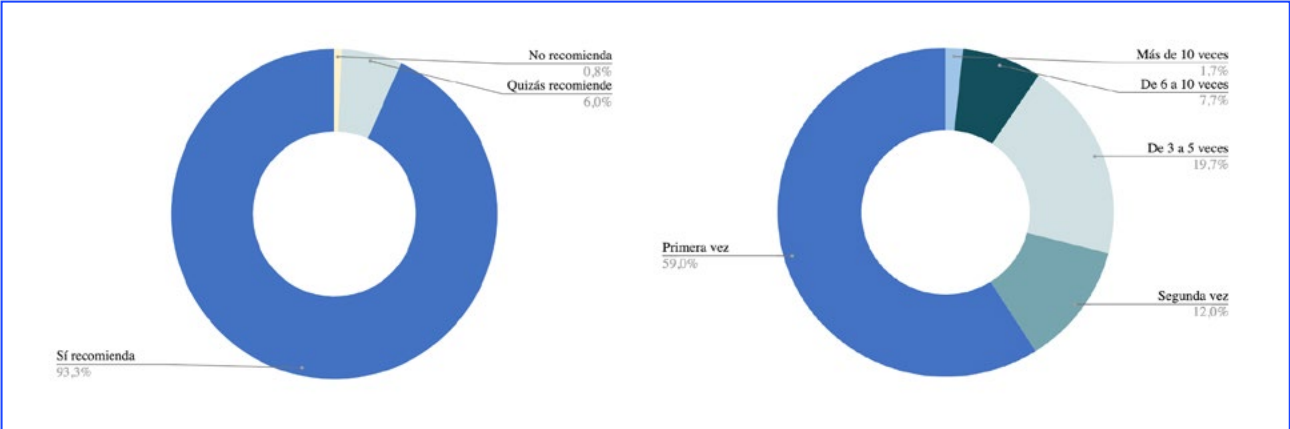
The city of Malaga, with its wealth of history, cultural offer and natural beauty, has established itself as a destination that not only attracts new visitors, but also encourages them to return. The novelty of the Malaga experience is reflected in the large number of first-time visitors, but at the same time, the city is impressive enough to encourage return visits.

The buoyancy of Malaga’s tourism industry is evident in the fact that a clear majority of visitors are newcomers, exploring what the city has to offer for the first time. It is noteworthy that, in addition to the influx of new visitors, there is a sizeable percentage who return, showing that Malaga not only attracts, but also retains its tourists. Approximately one third of tourists have visited the city more than once, with one group returning regularly, demonstrating loyalty that goes beyond a one-off visit.

Willingness to recommend Malaga as a destination is a key indicator of tourist satisfaction. In this respect, the city receives praise, with the overwhelming majority of visitors willing to recommend it, underlining the positive and lasting impact of their stay. Moreover, the intention to return is strong among respondents, with a majority confirming their desire to come back.

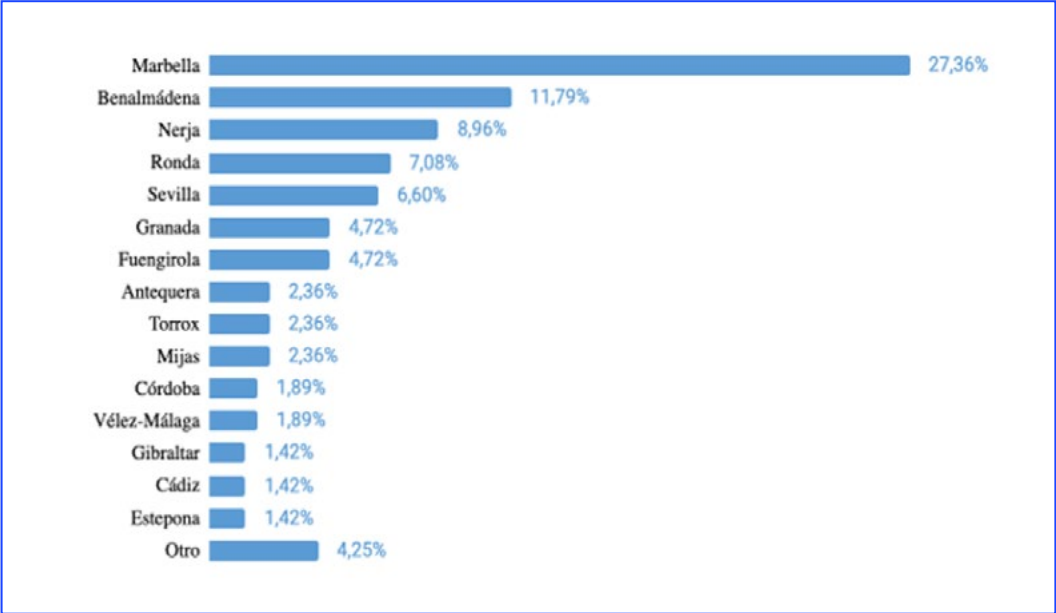
This data highlights Malaga’s ability to create a memorable experience that not only meets but exceeds expectations, leading to enthusiastic recommendations and a strong intention to return. To conclude, Malaga not only attracts the interest of first-time visitors, but also builds a long-term relationship with them, cementing its position as a renowned tourism destination.

Figure 8: Analysis of visits and recommendations in the city of Malaga 2022



Source: Compiled by author based on data from the Tourism Observatory of the city of Malaga 2022

Figure 9: Municipalities most frequently visited by tourists besides Malaga 2022



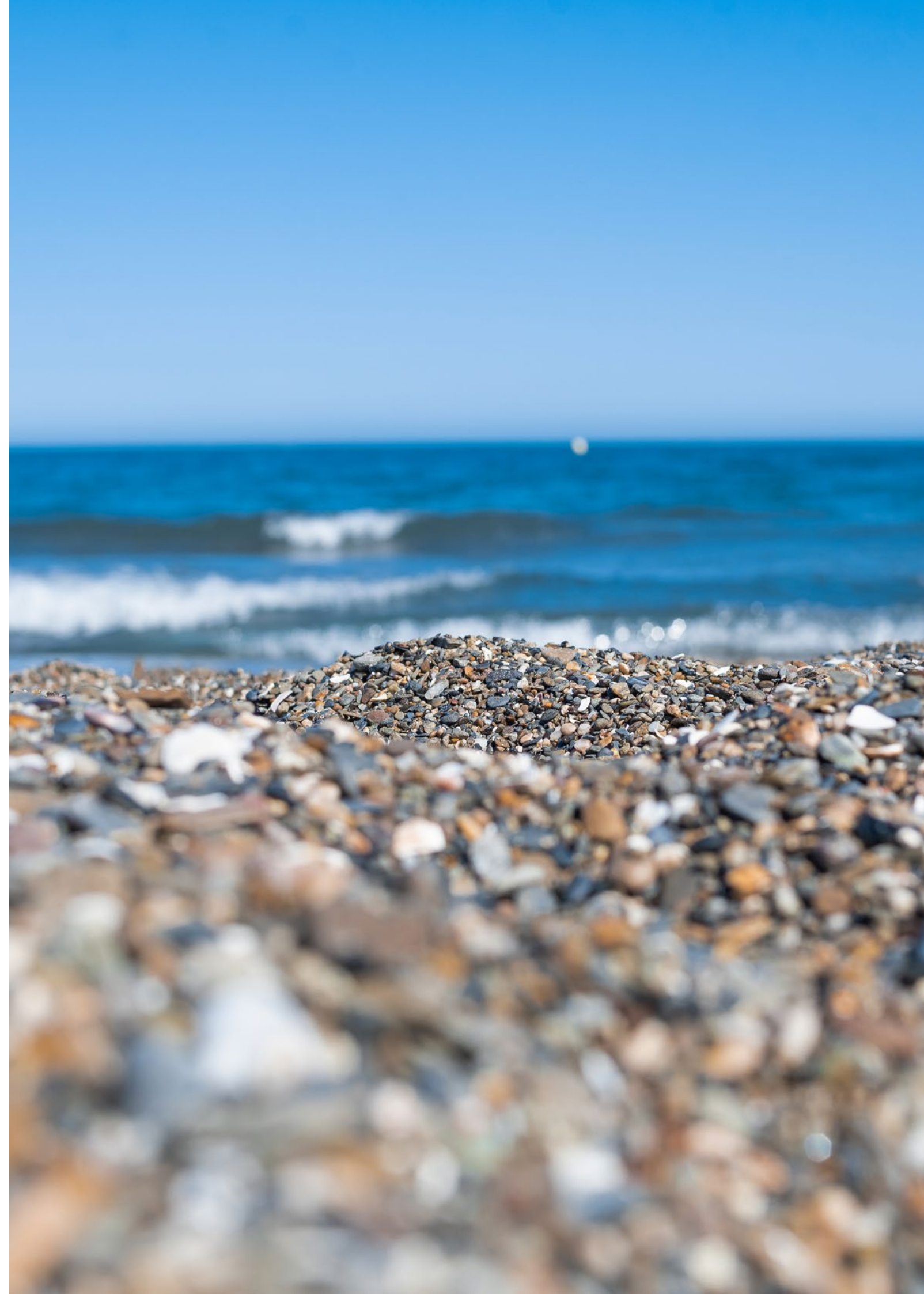
Source: Tourism Observatory of the City of Malaga

Municipalities most frequently visited by tourists besides Malaga

Among tourists in the province of Malaga, there is a strong preference for coastal destinations and culture-rich towns and cities. Marbella, with a hefty 27.36%, is the most frequently visited municipality after Malaga, reflecting the appeal of its beaches and upscale lifestyle. Other coastal destinations such as Benalmádena and Nerja also feature strongly, reflecting the popularity of the Mediterranean coastline and its leisure offerings.

Although with lower percentages, historic cities such as Ronda and Seville highlight the penchant for history and culture among tourists. Although they are not at the top of the list, Granada, famous for its heritage monuments, and Seville, with its Andalusian heritage, remain essential destinations.

The range of tourist preferences underlines the strength of Malaga as a tourism hub, around which a number of municipalities are clustered, complementing and enhancing the tourism experience in the region with their diverse heritage, nature and recreational offerings.



Conclusions

This study paints an optimistic picture for the future with regard to several key areas. By conducting annual surveys, Malaga has shown its commitment to continuous improvement and catering to the needs of its citizens and visitors.

“The positive perception of tourism would suggest that Malaga will continue to benefit from its role as a key economic driver, provided that a balance is struck that preserves the quality of life of residents.”

The consistency in local satisfaction suggests that the city can maintain and possibly increase its long-term attractiveness through the continuous improvement of essential services such as street cleaning and urban transport.

Firstly, the positive perception of tourism would suggest that Malaga will continue to benefit from its role as a key economic driver, provided that a balance is

struck that preserves the quality of life of residents. Tourism development strategies, which are aligned with citizens’ perspectives, signal a future in which tourism infrastructure and marketing will be strengthened, with the city being promoted globally.

Our analysis of the housing market also reveals a recovery and upward trend in housing prices, suggesting that the local market is growing stronger and could continue to do so if the current economic momentum continues. This buoyancy in the real estate sector is a promising sign for attracting investment and sustainable urban development.

In terms of tourist perception, the high rate of visitor satisfaction and intention to return promise continued growth in tourism in Malaga. The city has succeeded not only in attracting their initial attention but also in building loyalty that drives return visits, a crucial factor for the long-term sustainability of tourism.

Moreover, because the employment status and demographic profiles of the tourists vary widely, Malaga will continue to attract a broad spectrum of visitors, ranging from working professionals to pensioners and students. The trend in gender profiles shows that Malaga is establishing itself as an inclusive destination, capable of attracting diverse visitors.

“The high rate of tourist satisfaction and high intention to return among visitors promise continued growth in tourism in Malaga.”

Finally, the preference for coastal destinations and towns and cities with rich cultural heritage in the Malaga region suggests that such places will continue to be a vital extension of the city’s tourist appeal. Cooperation between neighbouring municipalities and the provincial capital is likely to be crucial in

providing an integrated and diverse tourism experience. Complementing this approach, innovation also plays a vital role in protecting its residents and visitors, as illustrated by the roll-out of AlertCops. This app highlights the city’s commitment to safety and innovation by improving the assistance provided to citizens and tourists alike. Adopting this technology is a further step towards cementing best practices and highlights how technology can boost Malaga’s positive image and enhance the overall experience in the region.

Overall, these results reflect a promising future for Malaga, where innovation in municipal management and the promotion of tourism, combined with real estate development and visitor satisfaction, will be the pillars of a city that is driving towards service excellence for citizens and tourists.





<https://sto.malaga.eu/indicadores/satisfaccion-local/>