

# TOURISM IN ANDALUSIA. A DIACHRONIC, ECONOMIC, SOCIAL AND SUSTAINABLE DEVELOPMENT ANALYSIS

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**Tourisme en Andalousie. Une analyse diachronique, économique, sociale et du développement durable.** L'Andalousie, la région la plus méridionale de l'Espagne, est dotée d'un patrimoine historique, artistique, culturel et paysager d'une grande richesse. C'est également l'une des principales destinations touristiques de la péninsule ibérique. Au fil des ans, le secteur du tourisme a évolué pour refléter les transformations économiques et sociales du pays, mais aussi pour adapter ses politiques aux enjeux modernes, tels que la gestion du tourisme de masse et l'adoption de stratégies visant à diversifier l'offre. Le document propose une analyse diachronique de l'industrie touristique andalouse, en examinant les facteurs qui ont marqué son processus de croissance, jusqu'à la transformation postpandémique et l'intégration des principes de durabilité pour relever les défis du développement rural, de la protection et de la mise en valeur du patrimoine, ainsi que de l'inclusion sociale. L'accent sera mis sur des projets spécifiques concrètement appliqués dans la région, tels que le tourisme écologique et le tourisme régénérateur, et leur impact économique, social et territorial sera évalué. L'aspect méthodologique consistera à extrapoler les données officielles sur le tourisme régional et à analyser la dynamique évolutive et l'impact socio-économique de l'adoption de pratiques « vertes », favorisant le développement de formes de tourisme rural et résilient. L'article examine les opportunités et les défis auxquels l'Andalousie est confrontée pour garantir des bénéfices durables pour la communauté locale et l'environnement. Il présente également les résultats du processus de croissance, puis d'adaptation aux modèles de marché modernes du tourisme andalou, qui ont permis de retrouver les niveaux d'activité d'avant la crise. Les résultats mettent en évidence l'approche avant-gardiste de la région dans l'adoption de pratiques durables dans le secteur du tourisme pour répondre aux besoins territoriaux et sociaux.

## 1. INTRODUCTION

Tourism, as a social and economic phenomenon involving voluntary travel for leisure, culture, work or other reasons, was initially a “luxury” reserved for a select group of wealthy individuals. However, from the second half of the 20<sup>th</sup> century, the situation changed thanks to developments in transport, increased average incomes, and the spread of leisure culture to lower income groups. This marked a transition from pioneering “elite tourism” to the well-known mass tourism of today. In recent turbulent years, the sector has shown remarkable resilience: after the pandemic crisis, world tourism started to recover rapidly, driven by the demand for authentic, sustainable and customised experiences. An increasing focus on sustainability, the digitisation of services, and the diversification of supply have become key elements in the competitiveness of tourism destinations (UNWTO, 2023).

This study does not seek to examine the dynamics impacting the global tourism sector. Instead, it focuses on events affecting tourism in Spain, particularly in the context of the autonomous region of Andalusia. Spain has confirmed itself as one of the world's leading tourist destinations, with a very active tourism sector committed to adopting sustainable measures to balance visitor satisfaction with respect for host locations. Tourism today represents one of the fundamental pillars of the Spanish

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economy, thanks to the constant growth that has established the country as one of the world's leading tourist destinations. It is now an accessible and attractive destination for millions of visitors, particularly from Europe, thanks to its diverse offerings of cultural, rural, gastronomic, and nature tourism. In 2019, Spain welcomed more than 83 million international tourists, confirming its position as the second most popular destination in the world (INE, 2020). Before the pandemic, the tourism sector contributed about 13% to the national GDP, generating millions of jobs and accounting for 12.6% of total employment (INE, 2020). Following the collapse caused by the pandemic, the sector recovered swiftly and robustly: in 2022, tourism accounted for 12.2% of the GDP. In 2023 and 2024, new records were set in terms of both tourist arrivals and expenditure, with domestic and international demand growing steadily (INE, 2024; Exceltur, 2024).

When taking a closer look at Spain, Andalusia stands out as one of the country's leading tourism regions. Thanks to its geographical location between the Mediterranean Sea and the Atlantic Ocean, its mild climate, rich cultural and natural heritage, and diverse offerings, Andalusia attracts millions of visitors every year. While the region was mainly known for beach tourism and monumental cities in the 1960s and 1970s, today the offer has expanded to include rural, food and wine, nature, and sustainable tourism (García Sánchez, 2014). In 2024, Andalusia welcomed around 36 million tourists, returning to pre-pandemic levels and demonstrating remarkable resilience and adaptability (INE, 2024). Tourism currently accounts for 13% of the regional GDP, generating over 400,000 direct jobs and revenues in excess of EUR 20 billion annually (Empresa Pública Turismo y Deporte de Andalucía, 2024). The multiplier effect of the sector is evident: for every euro spent by visitors, almost 1.5 euros are generated in the local economy. Thus, the region is confirmed as a laboratory for tourism innovation, focusing on digital transformation, environmental sustainability, and the enhancement of its unique resources. This consolidates tourism as one of the leading economic sectors for the entire area (CaixaBank Research, 2024).

Andalusia, in the south of Spain, is one of the most fascinating and historically rich regions of the peninsula. Known for its vibrant, typically Hispanic culture and Arab and Roman influences over the years, it has an important environmental heritage, thanks to the presence of enchanting landscapes that make it one of the most popular and attractive tourist destinations in Spain (Gómez Zotano & Pérez Morales, 2017). From a geographical point of view, the region boasts the availability of all types of environments, sea (Mediterranean) and ocean (Atlantic), mountains (Sierra Nevada) and plains (Guadalquivir Valley), accompanied by a favourable Mediterranean climate (warm summers and mild winters), which makes it pleasant to visit at any time of the year (Rivera Mateos & Rodríguez García, 2017). According to the latest available data from Empresa Pública Turismo y Deporte de Andalucía, referring to the period 2023–2024, seasonality in tourism in the Andalusian Autonomous Region is still evident, with a clear prevalence in summer. However, deseasonalisation policies and the variety of cultural events are gradually spreading visitor numbers throughout the year. This reduces pressure in peak months and enhances the regional tourist offer throughout the year. Of a total of 36.2 million tourists (including 13.6 million international tourists) in 2024, each season saw visitor arrivals: Spring: 27% (9.77 million); Summer: 38% (13.76 million); Autumn: 20% (7.24 million); Winter: 15% (5.43 million).

From a historical and cultural point of view, Andalusia is a land of extraordinary richness, influenced by centuries of different civilisations and cultures, starting with the Iberian peoples, the Romans, the Arabs and, finally, the Christian conquest. Among the different kingdoms, the Muslim one (711–1492) has left a deep mark on this land, and there are various illustrations of this, especially from an architectural and monumental point of view, such as the famous Moorish palace called “Alhambra”, in Granada (Fernández-Puertas, 1997); the mosque “Mezquita de Córdoba”, which stands proof of the fusion between the Islamic and Christian cultures (Harvey, 1990); the cathedral of Seville and the Giralda, symbols of the return to Christian art in the wake of the Islamic period (Fletcher, 2006). These tokens of identity, inherited from the coexistence of several cultures in a single land, are also a clear

demonstration of the dual function that ancient structures can assume in different but close contexts, such as the tourist market and the religious context (Fernández Tabales & Santos Pavón, 2018). Andalusia's cultural identity is not only concentrated in the architectural remains of ancient civilisations, but is also rich in unique traditions that embrace different realities, such as music, expressed through the famous flamenco dance with gypsy, Arab and Jewish roots – an emotional and intense expression of suffering and passion. The various festivals, such as the religious processions during Holy Week, the colourful *Feria de Sevilla* and the Jerez Fair, which celebrates the local wine (sherry), are also an essential part of this heritage (López-Guzmán & Sánchez Cañizares, 2012). And, of course, the rich culinary tradition, full of iconic dishes such as tapas, gazpacho, the famous *jamón ibérico* and fried fish from the Costa del Sol. Typical elements make it one of the main drivers of the Spanish economy, despite being an area that has suffered from high unemployment for years. The region has been able to make the most of its strengths, one of which is undoubtedly tourism (Considering the path from the top to the bottom, it is worth noting that figures have recovered in recent years). In 2019, there were around 32.5 million tourists; this figure dropped to around 13 million in 2020 due to the pandemic. In 2021, there were around 20 million tourist arrivals, rising to around 30 million in 2022, which saw a partial return to pre-Covid levels. In 2023, there were around 31 million tourist arrivals (IECA, 2019-2024), and in 2024, a new record of around 36.2 million tourist arrivals was reached, a figure estimated and communicated by the regional authorities (Junta de Andalucía, 2024b), which offers visitors an enviable range of attractions capable of satisfying different forms of tourism, represented by cultural and monumental tourism in Seville, Granada, Córdoba, Ronda, Úbeda and Baeza, by nature and rural tourism in the Doñana National Park (Huelva, Seville and Cádiz), the Cazorla, Segura and Las Villas Natural Park (Jaén) and Sierra Nevada (Granada), as well as the natural parks in the inland provinces. It is also represented by seaside tourism in the Costa del Sol (Málaga and Marbella), the Costa de la Luz (Cádiz and Huelva), and Almería, where there are opportunities for sports such as skiing, trekking, and mountaineering in the Sierra Nevada, surfing in Tarifa, and extreme sports in the inland provinces. Other types of tourism include alternative tourism and tourism of small villages. The main destinations here are Cádiz with the Costa de la Luz and the White Villages, as well as Granada with the Alpujarras. There is also Gastronomy and wine tourism, with itineraries dedicated to discovering local specialities in Jerez de la Frontera (Sherry wine), Seville, Málaga, Córdoba and Cádiz. Agriculture is also very important, and Andalusia is the agricultural heart of Spain, with fertile soils ideal for growing crops – it produces 80% of Spain's olive oil, as well as abundant quantities of fruit and vegetables (García Azcárate & Ramos Real, 2021).

The growing need to balance investments and policies to maximise the overall benefits of regional tourism has called for a strategic and sustainable approach to travel and visits to Andalusia (Mowforth & Munt, 2016). For these reasons, the tourism sector, as the region's main source of income, has opened to the process of sustainable development (Díaz-Parra & Jover, 2021b). However, this development is not without its challenges. Two closely related yet distinct phenomena stand out in particular: mass tourism and overtourism. Mass tourism refers to the arrival of large numbers of visitors, which has historically been a key economic resource for the region, contributing to growth and employment. Nevertheless, this phenomenon can put significant pressure on infrastructure, the environment, and the quality of life of local communities, particularly in the most popular and densely visited areas. Overtourism, on the other hand, is a more specific and problematic consequence of mass tourism. It occurs when the number of visitors exceeds a destination's sustainable carrying capacity, resulting in negative effects such as overcrowding, price hikes, environmental degradation, and social tensions. In Andalusia, cities such as Seville, Málaga and Granada have experienced these dynamics, prompting local authorities to implement regulatory and seasonal adjustment policies aimed at mitigating impacts and preserving cultural and environmental authenticity. This comparison between mass tourism and overtourism is crucial to understanding the challenges that Andalusia faces on its path towards regenerative and responsible tourism. This approach not only limits damage but actively contributes to the improvement of the communities and ecosystems involved.

Of course, this has practical and theoretical implications, the former referring to real achievements in the field of environmental protection, local economic development, community involvement and mass tourism management (UNWTO, 2020). Taking this into consideration, Andalusia is, from a theoretical point of view, a case study for the integration of economic growth (profit), social justice (people) and environmental sustainability (planet) in an area under strong tourist pressure (Lozano & Huisingh, 2011); in relation to “regenerative tourism”, i.e., tourism that goes beyond the concept of sustainability and aims to improve localities and communities through tourism (Global Sustainable Tourism Council, 2025); the use of tourism as a “decolonisation tool” to guarantee the uniqueness of Andalusian culture without homologating it to others (Pérez Ruiz, 2022); the application of circular economy principles to tourism, including the recycling of resources, the reduction of the sector’s ecological footprint and the transition to renewable energies (Andalucía World, 2024); and the adoption of sustainability indicators to assess the impact and monitor Andalusian tourism (Noguera García & García Martínez, 2020).

## 2. MATERIALS AND METHODS

The methodology adopted for analysing tourism in Andalusia from 2019 to 2024 is based on an integrated approach combining quantitative and qualitative analyses. This approach is aimed at assessing the evolution, impact and prospects of the regional tourism sector, with a particular focus on sustainability and regeneration. Data were collected from official statistical sources such as the Instituto Nacional de Estadística (INE), Empresa Pública Turismo y Deporte de Andalucía, the World Tourism Organisation (UNWTO), Smartdata Andalucía and Exceltur, as well as sector reports and strategic documents including the META 2027 Plan. Data on arrivals, presence, average expenditure, employment, and environmental and social impacts were extrapolated and analysed diachronically to identify trends and discontinuities, such as the impact of the pandemic, as well as recovery strategies. Qualitative analysis focused on evaluating public policies, pilot projects, and local sustainable and regenerative tourism initiatives by consulting institutional sources and academic literature. A comparative approach was adopted between mass tourism and sustainable tourism practices, focusing on impacts and prospects. Regarding these perspectives, the approach entails using linear growth models based on official data and forecasting models, as in the formula:

$$T(t) = T_0 + r \cdot t \quad [1].$$

Where  $T$  is the percentage of sustainable tourism in the year of interest ( $t$ ).  $T_0$  is the percentage of the same factor (sustainable tourism) at the start of the observations,  $r$  is the annual growth rate of the factor in question, and  $t$  indicates the number of years between the year of interest in the calculation and the start of the analysis.

The results were interpreted in terms of sustainable development, resilience, and territorial innovation, integrating the different dimensions of the tourism phenomenon, and discussing the opportunities and challenges that emerged during the considered period.

## 3. STUDY AREA

The study area is Andalusia, the southernmost region of Spain. It is located between the Mediterranean Sea and the Atlantic Ocean and is bordered by Extremadura and Castile-La Mancha to the North, Murcia to the East, Gibraltar and the Mediterranean Sea to the South, and Portugal and the Atlantic Ocean to the West. It covers an area of approximately 87,600 km<sup>2</sup>, making it the largest autonomous community in Spain. In 2024, Andalusia’s population was estimated to be around

8.5 million, accounting for approximately 18% of Spain's total population. The region's major cities include Seville (the capital), Málaga, Córdoba, Granada, Cádiz, Almería, Huelva, and Jaén. Tourism is the driving sector of the regional economy, with more than 36 million visitors in 2024 contributing, both directly and indirectly, more than 12% to the regional GDP. Agriculture also plays a key role, with Andalusia being the national leader in the production of olive oil (80% of the Spanish total), fruit, vegetables, and quality agri-food products. The industry and services are mainly developed in the agri-food, textile, and chemical sectors, as well as in services related to trade, culture, and innovation. Fishing and livestock farming are important in coastal and rural areas, while investment in renewable energy, particularly solar and wind power, is steadily growing. Andalusia's natural and cultural heritage comprises a variety of environments, ranging from the Sierra Nevada and Sierra Morena mountains to the Guadalquivir plains, and from the Costa del Sol coasts to the large natural parks such as Doñana, Cabo de Gata-Níjar, Cazorla, Segura y Las Villas, and the historical cities of Seville, Granada, Córdoba and Cádiz, which are famous for monuments such as the Alhambra, the Mezquita, the Giralda and the Real Alcázar, Costa de la Luz and Costa Tropical. The region is also home to historical cities such as Seville, Granada, Córdoba and Cádiz, which are famous for monuments such as the Alhambra, the Mezquita, the Giralda and the Real Alcázar. The population has a strong cultural identity, expressed through flamenco traditions, religious festivals such as Easter Week, traditional cuisine and the presence of both tangible and intangible UNESCO heritage. Andalusian society is dynamic and committed to social inclusion and sustainability, while addressing issues such as structural unemployment, overtourism in certain areas, territorial imbalances, and the need for innovation. Opportunities for the future lie in the development of inland and rural areas, the diversification of tourism, the sustainable development of tourism, urban and rural regeneration, and the green transition. These factors place Andalusia at the forefront of the European and Mediterranean tourism scene.

## 4. DISCUSSIONS

### 4.1. Diachronic discussion of tourism in Andalusia

In a constant flow of growth and social transformation, the tourism industry has also adapted to this process of innovation, investing in renewable energy, technology and innovation, and adopting a sustainable development model (OECD, 2021a and 2023). But how did it become necessary to transform even the economic factor with the greatest potential? Between the 1960s and 1970s, Andalusia began to emerge as the most attractive Iberian tourist destination. The architects of this "tourist boom" were the international promotion of the Spanish territory and the subsequent expansion of mass tourism, the growth of commercial aviation, which facilitated travel between countries, and the rise of the European middle class (Ministerio de Industria, Comercio y Turismo de España, 2023). The peculiarities of Andalusia soon became an object of desire for European travellers, especially those from places more alien to these environments and climates, such as the United Kingdom, Germany and the Netherlands. This necessitated the creation of an adequate reception and hospitality infrastructure to enable the region to respond to the tourist boom. Initially, the main tourist product was seaside tourism, but in the 1980s and 1990s this was no longer enough, as the market was already used to this type of tourism, so it was necessary to broaden the horizons and diversify the offer. Diversification and consolidation were not difficult, given the presence of historic cities such as Seville, Granada and Córdoba, which became cultural tourism destinations thanks to their enviable architectural and cultural heritage (García Hernández *et al.*, 2017a) During these years, other types of tourism began to emerge, such as rural tourism and wine tourism (López-Guzmán & Sánchez Cañizares, 2012). The advent of the new millennium also brought with it a greater awareness of the environment and all that surrounds the increasingly crowded tourist destinations. With a focus on the preservation of natural and cultural heritage, the process of convergence

towards sustainable tourism began in response to the overcrowding that was causing so many problems for the carrying capacity of the places visited (Junta de Andalucía, 2024b). To offer the market a further diversification of visitor attractions, ecotourism, rural tourism and adventure tourism, i.e., more authentic forms of tourism with less impact on the ecosystem, became widespread (UNWTO, 2021). The expansion of alternative activities and customised experiences has effectively diversified tourist flows; it has also posed new challenges in managing over-tourism. Targeted strategies are required to avoid saturating particularly attractive areas (Andalucía World, 2024). In fact, the process of empowerment was soon interrupted in the years of digitalisation, 2010–2020, when tourist flows increased dramatically, in full consumerist style, hitting the artistic-cultural resorts and, above all, the seaside resorts (Costa del Sol). As shown by the official data from the Junta de Andalucía's Encuesta de Coyuntura Turística de Andalucía (IECA), the evolution of flows from 2010 with about 22.5 million total tourists, (2011: 23.3 mln; 2012: 22.6 mln; 2013: 23.4 mln; 2014: 25.0 mln) passing through 2015 with about 26.5 million total tourists (2016: 28.5 mln; 2017: 29.5 mln; 2018: 30.7 mln), until 2019, the year of the Andalusian tourist peak with about 32.5 million tourists. At the beginning of 2020, the global Coronavirus pandemic blocked all forms of travel, resulting in arrivals falling below 8 million visitors. Once the crisis was over (2021–2024), tourism in Andalusia experienced a significant recovery, with visitors returning in droves, but this time more interested in sustainable, ecological and quality tourism. In fact, what has been a disaster for the world has been a blessing for experiential and sustainable tourism, leading individuals to reassess their holiday interests and pushing for a rapid shift to less impactful forms of tourism that are more respectful of natural and cultural resources (Junta de Andalucía, 2023c). The result has been a revival of domestic tourism and an increase in demand for closer destinations.

Below is a map prepared by the authors of the Andalusian region, divided by colour according to the predominant activity in the area. Green represents rural tourism, the predominant activity in the provinces of Huelva and Jaén; orange is the colour chosen to stand for cultural tourism, typical of the large, urbanised areas where many Andalusians live, such as Seville, Córdoba and Granada; blue, synonymous with the sea, represents seaside tourism, the great strength of the provinces of Cádiz, Málaga and Almería (Fig. 1).



Fig. 1 – Map of prevailing tourism in Andalusia.

Source: Authors' elaboration.

#### 4.2. Andalusia. Between tourism and religion

Andalusia's tourism potential is diverse, and the comparison between lay and religious tourism is particularly striking. Both are important pieces of the same puzzle, and both have a great capacity to attract visitors from all over the world, thanks to the excellent range of religious goods and services on offer on the world tourist scene (Centro Astalli, 2024). However, they differ significantly in terms of their travel motivations and destinations, the activities offered to the “customer” and their economic and social impact (López-Guzmán & Sánchez Cañizares, 2012). Both types are well endowed with attractions for visitors, with traditional tourism including different types of activities, such as cultural, with visits to historical monuments and World Heritage sites; seaside, with stays on the picturesque beaches of the Costa del Sol or the Costa de la Luz; food and wine, with tasting of local delicacies, wines and tapas; and rural and adventure tourism, with a focus on exploration and excursions in the local natural beauty (García Hernández et al., 2017b). On the other hand, religious tourism in Andalusia includes visits to sanctuaries and historic churches, as well as more exploratory activities involving more physical effort, such as pilgrimages to places of worship (the Camino de Santiago de Compostela – the Costa del Sol route – is famous). Tourism is closely linked to annual religious celebrations, with Holy Week being *par excellence* the event of the Andalusian religious tradition (Andalucía World, 2024).

Given the different types of tourism offered to visitors and the motivations that lead them to devote their leisure time to it, the economic and social impact is also different. Lay tourism, as already mentioned, is an important element in the functioning of the Andalusian economic machine (Junta de Andalucía, 2024b) It actively participates in the creation of jobs and favours local business activities, contributing significantly to the maintenance of the region and of the main towns and coastal areas. As reported by the data published by the Instituto Nacional de Estadística (INE), these forms of tourism contributed approximately 11% of the total value of 13% of the GDP generated by the entire sector from 2018 to 2024 (except for 2020 and 2021 due to the pandemic). An analysis of the employment data generated by “lay tourism” also showed that approximately 355,000 people were employed in 2018, rising to around 365,000 in 2024. Meanwhile, regarding the economic impact of visitor expenditure on the region, data from Turespaña shows an increase in average tourist spending, rising from €1,000 in 2018 to €1,300 in 2024. Religious tourism, unlike its counterpart, participates to a lesser extent in the economic growth of the region. Nevertheless, during limited periods of the year closely linked to the celebrations of traditional festivals of faith (such as Easter Holy Week, Christmas, “*Los Reyes Magos*” on 6 January), it provides a significant boost to the local economy, preserves the historical and cultural heritage, and promotes Andalusian cultural identity and social cohesion (Junta de Andalucía, 2023a).

Below is a table (Table 1) comparing the two tourism realities in the region.

Table 1

Religious tourism and Traditional tourism in Andalusia

	<b>Religious Tourism</b>	<b>Cultural, Seaside, Rural Tourism</b>
Type of Visitors	Peregrines, devotees, people interested in spiritual experiences	Tourists interested in culture, nature, relaxation, gastronomy, ...
Main Destinations	Santiago de Compostela (Costa del Sol route), historic churches, shrines such as the Virgen de la Cabeza, Seville Cathedral, the Holy House of Loreto in Jerez	Alhambra in Granada, Mezquita in Córdoba, Giralda in Seville, Costa del Sol, Sierra Nevada Natural Park, beaches
Main activities	Visits to churches, shrines and pilgrimage sites, religious celebrations (such as Holy Week)	Cultural visits, food and wine tours, beach activities, excursions to natural parks
Seasonality	Peaks during religious events such as Holy Week, pilgrimages and religious festivities	High season in the summer months (June–September) for beach tourism, peaks during the winter holidays (winter tourism and skiing)

Table 1 (continued)

	<b>Religious Tourism</b>	<b>Cultural, Seaside, Rural Tourism</b>
Influx of Tourists	Less numerous than traditional tourism, but highly concentrated during religious events	Broader and more distributed, with a continuous presence throughout the year
Average Expenditure	Contained, for short stays and low-cost activities	Varied, higher average expenditure for luxury stays, wine and food tours and excellent tourism experiences
Average Length of Stay	1–3 days (except for the routes linked to the Camino de Santiago: the Camino Mozárabe from Almería, 55–65 days in total, of which 25–30 days in Andalusia; the Camino Mozárabe from Málaga, 50–60 days in total, of which 20–25 in Andalusia; the Via de la Plata from Seville, 40–50 days in total, of which 6–7 days in Andalusia)	4–7 days
Economic Impact	Moderate, limited to specific periods and places	High, includes main tourist activities and destinations
Local vs. International Tourists	Often local tourists or Spanish pilgrims, but also international devotees (especially during religious events)	Higher presence of international tourists (Europe, USA, Japan)

Source: Authors' revision based on data from Andalusian Tourism Agency.

Traditional and religious tourism are thus two complementary forms of tourism, each with its own characteristics, and both are essential to the regional economy. Of course, the former includes a wide range of products and services, but religious tourism in Andalusia also plays an important role in affirming the region as a spiritual centre, although it suffers from the periodicity of specific events and attractions strictly related to worship, which have a lesser impact (Junta de Andalucía, 2023a).

#### 4.3. The challenges and future measures of Andalusian's tourism

The tourism industry is the most important component in the economic dynamism of Andalusia. According to the Instituto Nacional de Estadística (INE), the tourism sector contributes around 13% (considering all forms of tourism expressed by the sector) of Andalusia's Gross Domestic Product (GDP), generating income from accommodation, catering, transport and related services (Ministerio de Industria, Comercio y Turismo de España, 2023).

However, the sector also poses challenges to society, as the traditional consumerist mindset is to generate wealth by exploiting available resources, a mindset at odds with the principles of sustainability (OECD, 2024).

The main challenges to social dynamics include:

- Overtourism: excessive numbers of visitors, which can lead to overcrowding and price increases, disrupting the normal flow of local life.
  - o From 2019 to 2024, tourist numbers in Andalusia grew by an average of 7–15% per year, excluding the collapse in 2020 due to the pandemic. This resulted in a record peak of 36.2 million tourists in 2024, causing overcrowding and putting pressure on infrastructure (CaixaBank Research, 2024).
- Gentrification: the transformation of a working-class neighbourhood into a prestigious area, changing the social, cultural and economic face of cities.
  - o There has been a 10–20% increase in tourist accommodation, particularly in Málaga and Seville, which has clearly impacted rental prices and the availability of housing for residents (Lillo, 2023).

- Pollution and environmental degradation: increased waste, noise pollution and severe degradation of ecosystems.
  - o There has been a 5–14% increase in urban waste and pressure on natural ecosystems, with a particular focus on natural parks such as Doñana. Authorities have started to implement sustainability plans (Junta de Andalucía, 2023b).

Table 2

The main social challenges for tourism

Years	Overtourism (% increase in tourist arrivals)	Gentrification (% increase in tourist accommodation in major cities)	Pollution and environmental damage (% increase in urban waste and ecosystem pressure)
2019	+4.5% (compared to 2018 of about 30.7 million tourists)	+12% (tourist accommodation Málaga and Seville, by around 29,000)	+5% (urban waste, pressure on natural areas)
2020	-30% (pandemic, drastic reduction in arrivals)	-8% (temporary contraction due to Covid closures)	-3% (temporary reduction in environmental impacts)
2021	+15% (post-pandemic recovery)	+10% (recovery tourist rentals)	+7% (increase in waste, pressure on ecosystems)
2022	+10%	+20% (growth of tourist accommodation and short-term rentals)	+10% (increase in waste and consumption of natural resources)
2023	+7%	+15% (expansion of tourist accommodation in urban areas)	+12% (further increase in environmental pressure in protected areas)
2024	+5,5% (36.2 million tourists, historical record)	+18% (tourist accommodation and short-term rentals, especially in Málaga and Seville)	+14% (urban waste and environmental impacts, ongoing mitigation initiatives)

Source: Caixa Bank Research, 2024; Andalusia.com, 2024.

In response to these social challenges, a balance is needed between economic growth and respect for sustainability. The response to these problems has been identified in the sustainable tourism policy, which aims to reconcile the development of the sector with environmental protection and respect for local communities (Junta de Andalucía, 2023c).

The contribution of tourism does not, therefore, end with its direct contribution to the GDP, but also works indirectly by creating millions of jobs in related activities, such as those mentioned above (hotels and restaurants, visitor support services, transport and trade) (García Hernández et al., 2017). This highlights the key role of tourism both for the overall economy of the region and for the growth of individual sectors and activities strategically linked to tourism, as well as for local communities and society. According to official figures, around 13% of Andalusia's workforce is employed in the tourism sector, with an increasing number of young people and women working in the sector (OECD, 2021b). To respond to the growing demand for tourism, infrastructure investments are also being promoted, such as the modernisation of accommodation facilities, the construction of new transport facilities, the dissemination of environmental education and the regeneration of urban and rural areas (UNWTO, 2021). Public and private intervention to finance marketing projects, tourism promotion and the preservation of Andalusia's cultural and historical heritage is also significant. In essence, these are

actions that also have an impact on social dynamics, bringing challenges and benefits to local communities.

Therefore, the integration of proper planning and a concrete commitment to sustainability are essential factors in using tourism as a lever for growth, without compromising Andalusia's rich cultural and environmental heritage.

#### 4.4. Influence of tourism in the urban and rural areas of Andalusia

The vast territory of Andalusia offers a wide range of tourist destinations to satisfy the different demands of visitors, from iconic cities offering tours focusing on culture and architecture, such as Seville and Granada, to rural realities with evocative natural landscapes, such as the Alpujarras and the Sierra de Grazalema. The region is an emblematic case of how tourism has very different economic and social impacts depending on the territorial context (García-López *et al.*, 2018).

As far as urban areas are concerned, the impact consists of:

- The main cities (Seville, Málaga, Granada) receiving many national and international tourists, thanks to their impressive historical, cultural and artistic heritage, symbol of different ancient civilisations. In the 2023–2024 period, the three destinations had a total of 5.2 million tourists in Seville (3.1 million national and 2.1 million international), 6.0 million in Málaga (3.4 million national and 2.6 million international), and 3.1 million in Granada (1.8 million national and 1.3 million international) (Empresa Pública Turismo y Deporte de Andalucía, 2024).
- Generating the largest share of regional GDP from tourism, with revenues stemming directly from tourism activities and attractions, and indirectly from sectors closely linked to urban tourism.
- The high availability of public and private funding sources to develop the necessary infrastructure and strengthen the sector.
- The spill-over benefits to related sectors through job creation, albeit usually seasonal.
- The increased pressure from tourism and higher prices in catering, hospitality and real estate.
- The increased risk of gentrification leading to the displacement of local people to the suburbs.
- The commercialisation of cultural heritage and the risk of loss of authenticity.

While for rural areas it consists of:

- Less economic weight in the region, but growing due to sustainable and experiential activities such as trekking, wine tourism and agritourism.
- Fewer products and services available, so local trade supporting experiential tourism predominates, such as small-scale agritourism, local guides and craft products.
- Limited structural investment, mainly aimed at enhancing local resources.
- Strengthening local communities, encouraging the preservation of traditions and cultural heritage.
- A lower risk of gentrification, but a greater dependence on seasonal tourism.
- Promoting the regeneration of abandoned areas and the preservation of the natural environment.

Comparing the two types of Andalusian tourist destinations, the different degrees of economic and social impact are evident. In a scenario where there is an increasing trend towards the adoption of “green” practices (Bramwell & Lane, 2011), the most beneficial impact appears to be on rural areas, from the point of view of benefits to the community, such as the better preservation and protection of

the environment; the strengthening of local agricultural and craft activities, given the growing demand for typical and traditional products; the strengthening of local culture through attractive traditional events (OECD, 2024).

Figure 2 is comparing the economic and social impact of urban and rural tourism in Andalusia, in terms of GDP, employment and heritage preservation (Junta de Andalucía, 2023a).

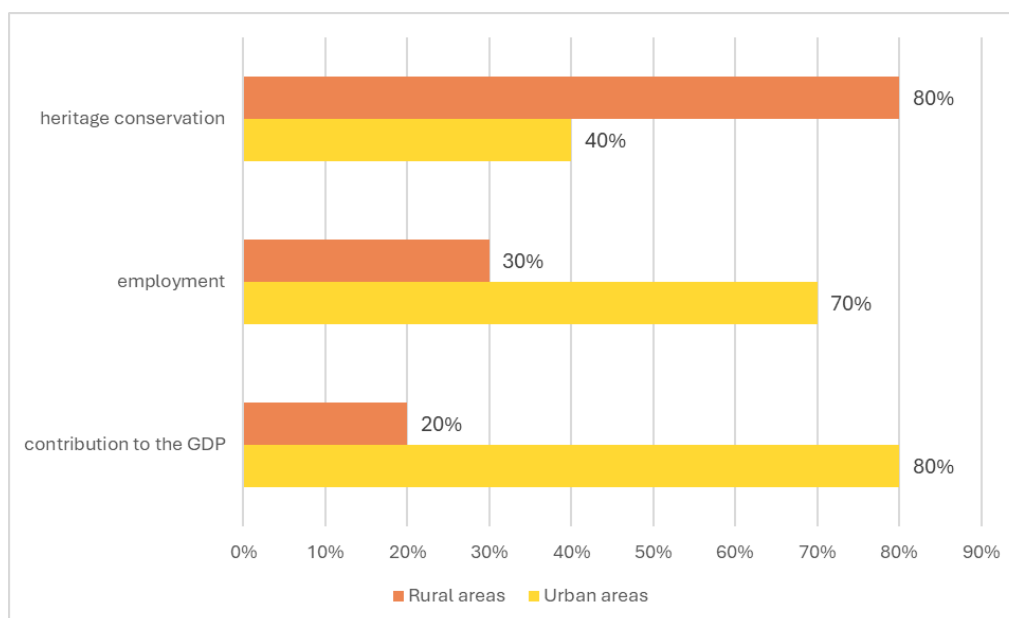


Fig. 2 – Economic and social impact of tourism in Andalusia.

Source: Authors' elaboration on Andalusian Tourism Agency data.

#### 4.5. Tourism issues in Andalusia

Despite the undoubted beauty of Andalusia as a tourist destination, the sector faces several structural problems that weaken its long-term sustainability. One of the most important is undoubtedly the saturation of mass tourism, which has led to overcrowding in many areas, compromising the quality of the tourist experience, causing serious damage to the ecosystem and relegating other potentially attractive areas to marginal status for lack of visitors (García Hernández *et al.*, 2017). Accompanying the first critical issue is the strong seasonality of tourism, which creates economic imbalances between the excessive pressure on infrastructure and the total lack of activity (Junta de Andalucía, 2023a). As shown by the data from Empresa Pública Turismo y Deporte de Andalucía. Several published reports reveal the same unequal distribution of tourist arrivals: in 2019, out of 31 million tourists, 40% arrived in Summer (around 12.4 million), followed by 25% in Spring, 20% in Autumn, and 15% in Winter (Empresa Pública Turismo y Deporte de Andalucía, 2020). In 2022, there were 30 million tourists, 38% of whom came in Summer (around 11.4 million), 27% in Spring and the same ratios in Autumn and Winter (Empresa Pública Turismo y Deporte de Andalucía, 2023). The same distribution of tourist presence is also evident in 2024, with a total of 36.2 million tourists, around 13.76 million of whom visited in Summer (Empresa Pública Turismo y Deporte de Andalucía, 2024).

Finally, there is the environmental impact in terms of intensive exploitation of natural resources and increased pollution, which is closely linked to tourism activities in the area (Junta de Andalucía, 2023c). Concerning the intensive exploitation of natural resources, the most notorious cases are water consumption, which happens in coastal areas (e.g., Costa del Sol) that record up to three times more

tourist water consumption than inland areas, with peaks in summer that put already limited local water resources under stress (Andalucía Water Agency, 2023), as well as land use, caused by the expansion of tourist accommodation and infrastructure, which results in the loss of natural habitats, especially in protected areas such as the Sierra Nevada Natural Park (European Commission, 1999). The most striking examples of pollution related to tourism activities are urban waste, which has increased since 2019 by an average of 10–14% annually in tourist provinces such as Málaga, Cádiz and Seville, directly related to the increase in tourist numbers (Lillo, 2023). Air pollution is also an issue, given the increase in vehicular traffic and transport activities related to tourism. NO<sub>2</sub> and PM<sub>10</sub> pollution in Andalusian coastal and urban cities increased by 5–8% from 2019 to 2024, contributing to the worsening of air quality in urban and coastal areas. Intensive bathing activity is putting pressure on marine ecosystems, generating eutrophication and degrading posidonia meadows, which are essential for marine biodiversity along the Costa de la Luz. It is estimated that posidonia meadows will degrade by 12% between 2019 and 2024 (Andalusian Environmental Agency, 2023).

Faced with these problems, there is a need for interventions that can ensure a balance between tourism potential and the preservation of the environmental and social *status quo* (Ministerio de Industria, Comercio y Turismo de España, 2023).

#### 4.6. Sustainable tourism development programmes in Andalusia

The extreme pressure on natural resources and cultural heritage caused by intrusive mass tourism has tested the respect for sustainability in Andalusia (Díaz-Parra & Jover, 2021a). Nevertheless, in recent years there have been efficient and effective interventions, as well as the adoption of fruitful programmes to raise awareness of respect for the environment and areas used for tourism:

- Ecological and sustainable tourism; Andalusia is actively involved in promoting fewer polluting practices (eco-tourism routes) and guiding visitors to discover atypical areas to preserve the environment, especially protected areas (Doñana, Sierra Nevada and Sierra de Grazalema Natural Parks).
- Cultural and responsible tourism: strengthening policies for the sustainable management of overtourism, limiting the number of visitors in high season and promoting visits in low season, respecting the carrying capacity of the destination areas, such as in historic cities (Seville and Granada), and promoting tourism in niche areas.
- Sustainable infrastructure, adapting existing infrastructure to sustainability criteria and integrating environmentally friendly technologies (“green” accommodation – renewable energy in hotels –, electric mobility in cities - Seville Metro -).

Sustainability certifications, to attract sensitised and aware tourists, by applying quality and sustainability labels to the different Andalusian tourism products and services (“Q” quality label).

Initiatives that demonstrate Andalusia’s commitment to “fighting” the extremely impactful and consumerist forms of mass tourism, by proposing viable alternatives capable of offering meaningful and memorable experiences, in the same way as typical overcrowded destinations. In fact, Andalusia is now the largest autonomous community in Spain where it is possible to carry out responsible, ecosystem-friendly activities (UNWTO, 2021).

- *Extraordinary programme of tourism sustainability plans in destinations*

To make progress in areas such as the competitiveness of tourism and the integration of a new, more sustainable digital model, the Ministry of Industry, Trade and Tourism is demonstrating its active commitment in this field through the “Tourism Sector Conference”. In this context, 175 tourism sustainability projects were approved (160 under the management of local authorities and 15 cohesion actions developed by the Autonomous Communities, which also have an impact on the destinations), as part of the 3<sup>rd</sup> Extraordinary Call for Tourism Sustainability Plans in the Destination 2023 programme,

financed through the Next Generation I and Recovery Plan funds (Ministry of Industry, Trade and Tourism), for a total of 1,858 million (478 million in 2023, 720 in 2022 and 660 in 2021) (Ministerio de Industria, Comercio y Turismo de España, 2023). Of these projects approved by the Government, there are 24 Tourism Sustainability Plans for the Andalusian territory, for a total of 57.9 million euros (Junta de Andalucía, 2023a).

- *The META Plan*

Also known as the Andalusian Sustainable Tourism Plan, it is a strategic initiative that aims to guide the region's tourism sector towards a more sustainable, balanced and competitive model, addressing the challenges of mass tourism and seeking to maximise benefits for the Andalusian economy and society, while minimising negative impacts (Ministerio de Industria, Comercio y Turismo de España, 2023). The plan will be developed in several phases and will include quantitative and qualitative analyses to provide an accurate diagnosis regarding the problems and opportunities. The first is based on statistical data representing the current situation of the sector, considering key elements such as tourist flows, the competitiveness of the sector, emerging trends in tourism and the economic impact of the sector itself (Junta de Andalucía, 2021). The qualitative analysis, on the other hand, complemented the observations by including the level of engagement between the sector and the citizens (counting the participation of more than 300 tourism professionals) and analytical tools to examine the current landscape, including DAFO (SWOT analysis), competitiveness analysis, CAME (strategic analysis) and trend analysis (Junta de Andalucía, 2024a).

The results achieved by the programme can contribute to the improvement of the regional tourism landscape, as well as attempt to mitigate known problems. These include raising public awareness and sensitivity to the importance of sustainable tourism; the use of useful guidelines for long-term planning to extend the tourism transition process over the years; the development of new marketing strategies and the reorganisation of the offer, focusing on more authentic experiences related to cultural heritage, gastronomy and rural tourism; rendering the tourism offer more diverse so as to improve competitiveness (Junta de Andalucía, 2023a).

The optimistic vision of the META Plan is a solid starting point for the process of growth and green transition of Andalusian tourism, always respecting the needs of the market and not shying away from global challenges (OECD, 2022).

- *Regenerative tourism project in the Cabo de Gata-Níjar Natural Park.*

In Andalusia, two exemplary projects demonstrate a concrete commitment to the sustainable development of the sector by proposing regenerative practices and ecotourism. The idea is to integrate environmental education programmes with attractions and immersive experiences in nature. In the first aspect, the region proposes regenerative forms of tourism in the Cabo de Gata-Níjar Natural Park. A project that emphasises environmental restoration and community involvement, to minimise the environmental footprint of tourism and to revitalise natural resources and local cultural heritage (Gómez Zotano & Pérez Morales, 2017).

The economic and social impacts are analysed below:

1. The first aspect to be considered is the funding sources, i.e., the economic base supporting the ambitious project. This is the European DestiMED Plus programme, with a total budget of over 3.3 million euros, co-financed by the ERDF (DestiMED PLUS, 2022). A smaller but no less important contribution has come from the regional and local authorities directly involved in the management of the park.
2. Second, the cost of implementation. The cost of creating a sustainable tourism infrastructure, training local staff and setting up environmental monitoring systems.
3. Investments justified by the revenues generated by catalysing tourist interest in sustainable products and services that respond to the demand for 'experience' and thus encourage local spending. Again, the positive impact on employment rates is estimated, with an emphasis on "green jobs".

4. Inevitably, the project also has a social dynamic, encouraging local communities to participate in the management and development of the park, strengthening the sense of belonging to the area and implementing cooperation between local actors, as well as with administrations and tourism companies.

Figure 3 compares, on a hypothetical scale of 0 to 100, the advantages and disadvantages of the regenerative tourism project in the Cabo de Gata-Níjar Natural Park. The data were derived from impact assessments and monitoring metrics used within the European DestiMED PLUS project, which was financed by FEDER funds and developed according to the MEET Network model for monitoring ecotourism and sustainability in Mediterranean nature parks (MEET Network, 2023). The data show a positive impact on various aspects, including local infrastructure, quality of life and cultural enhancement, subject to some social challenges, such as the risk of economic dependence on sustainable tourism and the pressure on environmental preservation, the latter reduced but still present. It is therefore not illogical to argue that regenerative tourism can be an innovative economic and social model, provided that the balance between economic growth and environmental and social sustainability is maintained in the long term.



Fig. 3 – Impact of the regenerative tourism project in the Cabo de Gata- Níjar Natural Park.

Source: DestiMED PLUS, 2022; MEET Network, 2023.

- *Ecotourism project in the Doñana National Park.*

Regarding ecotourism, the Region promotes this type of initiative in the Doñana National Park, which covers more than 54,000 hectares between Huelva and Seville. << *Ecotourism in Andalusia is a tool for conservation and sustainable development. It is a new way of promoting tourism based on collective and ethical principles for the management of natural and cultural resources, whose economic benefits improve the quality of life of all sectors involved. It is an opportunity to strengthen the protection of the environment.*>> (Andeco, 2023).

The objective of ecotourism in this area is to preserve the great biodiversity present, while offering visitors exciting activities (birdwatching, guided photography, horse riding, cycling routes and boat trips on the Guadalquivir) (Junta de Andalucía, 2023b).

The following is an analysis of the economic and social impact generated (DestiMED PLUS, 2022):

1. The sources of financing for the project are European, national and regional public funds, as well as the LIFE programme of the European Union. Again, the useful economic and logistical contribution of private initiatives (specialised tour operators, environmental organisations).
2. Implementation costs for the maintenance of ecologically sustainable infrastructure (trails, viewpoints), training of guides and environmental monitoring.
3. The income stems from attractive tourist activities (guided tours, bird watching, horse riding, cycling). The economic spin-off also includes ancillary activities strictly dedicated to ecotourism (rural accommodation and local restaurants).
4. Undoubtedly, the impact of the project on social dynamics is the strengthening of the local cultural identity by increasing the visibility of the area under consideration. It has also caused tensions with the local population, leading to restrictions on certain activities, such as hunting and fishing, in order to preserve the park.

Figure 4 is a representation of the impact, on a hypothetical scale from 0 to 100, of the Andalusian ecotourism project, which displays the effectiveness and efficiency in bringing improvements to the community, such as increasing, whether directly or indirectly, employment, inducing greater environmental awareness and respect among the inhabitants, as well as increasing agricultural activities. Conversely, there are no fewer challenges that need to be faced, such as the proper management of intensive tourism, lest we run into the problem of creating greater pressure on local infrastructure and natural resources. In fact, as the graph shows, these pressures have increased since the project began. Another risk may be the inequitable distribution of the economic benefits of ecotourism, with more favourable treatment given to external operators than to local people.

Considering the risks that the area may face if tourist flows are not properly managed, the ecotourism project in the Doñana National Park appears to be a useful tool for integrating environmental preservation and economic development, provided that inclusive and sustainable resource management is maintained.

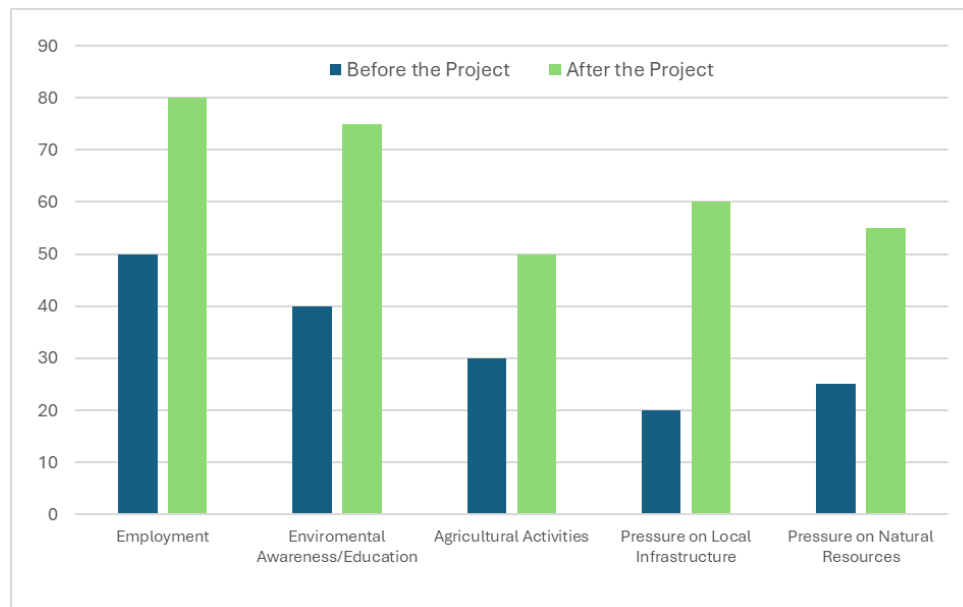


Fig. 4 – Impact of the Ecotourism Project in Doñana National Park.

Source: DestiMED PLUS, 2022; MEET Network, 2023.

#### 4.7. Tourism performance in Andalusia

The research carried out by the authors proposes a temporal analysis of the tourism sector and its performance, starting from 2019, the last pre-pandemic period, and up to 2024, a year not fully considered due to the lack of complete data on actual performance (Junta de Andalucía, 2023a). The results of the work are reported directly in the following table (Table 2), as a demonstrative representation of Andalusian tourism flows over the past six years. In a sense, the path taken by tourism during this period follows the classic structure of a roller coaster. The first great surge reached the first peak (2019, year of maximum tourism expression up to that point). However, this ended with a violent descent to the lowest levels (2020, pandemic congestion to travel and drastic decline in tourism) This was a prelude to a second, even more vigorous surge which reached an even higher point (2023, closing the circle with the complete recovery of all tourism practices and new record year for the sector) (PP Andalusia, 2023).

A summary of tourism in Andalusia from 2019 to 2024 is depicted in Table 2 and presents a complete overview of the performance, through a comprehensive analysis of the most important aspects of the sector.

Table 3

Andalusia tourism from 2019 to 2024

	2019	2020	2021	2022	2023	2024
Total Arrivals (millions)	20.9	7.9 (-62.2%)	13.2 (+67.1%)	18.8 (+42.4%)	19.7 (+4.8%)	21.4 (+8.6%)
Total Presences (millions)	32.5	13.0 (-60%)	20.0 (+53.8%)	30.0 (+50.0%)	31.0 (+3.3%)	36.2 (+16.8%)
National Arrivals (millions)	12.9	6.8 (-47.3%)	10.2 (+50.0%)	12.5 (+22.5%)	13.1 (+4.8%)	13.9 (+6.1%)
National Presences (millions)	19.8	9.6 (-51.5%)	14.8 (+54.2%)	18.9 (+27.7%)	18.9 (+4.2%)	21.0 (+6.6%)
International Arrivals (millions)	8.0	1.8 (-77.5%)	3.0 (+66.7%)	6.3 (+110.0%)	6.6 (+4.8%)	7.5 (+13.6%)
International Presences (millions)	12.7	3.4 (+73.2%)	5.2 (+52.9%)	11.1 (+113.5%)	11.3 (+1.8%)	13.6 (+20.4%)
Average Daily Expenditure (€)	69.5€	62.7€ (-9.8%)	67.4€ (+7.5%)	75.6€ (+12.2%)	81.3€ (+7.5%)	87.0€ (+7.0%)
Average Stay (days) (total presences/total arrivals = average stay)	1.56 days	1.65 days	1.52 days	1.60 days	1.57 days	1.69 days
Hotel Occupancy Rate	59.8	32.1 (-46.3%)	47.2 (+47.0%)	56.7 (+20.1%)	58.5 (3.2%)	62.4* (+6.7%)
Main Tourism Sectors	Beach, cultural and city tourism	Proximity tourism (mainly national)	Cultural, beach and city tourism	Beach, cultural and city tourism	Beach, cultural and city tourism	Beach, cultural and city tourism, with growth in city tourism

Table 3 (continued)

	2019	2020	2021	2022	2023	2024
Economic Impact	Significant regional GDP growth (+6-8%); tourism main development sector (Junta de Andalucía, 2020; CaixaBank, 2020).	Collapse of tourism revenues due to the pandemic (-60/ 61%); with a prevalence of domestic tourism (INE, 2021; OECD, 2021b).	Increase in revenue (+50% compared to 2020); The recovery is mainly driven by domestic tourism, while international tourism remains limited (INE, 2022).	Continued GDP recovery, with positive impacts from international tourism and increased average expenditure (Junta de Andalucía, 2023a).	Strong positive impact due to growth in international tourism and average expenditure; the sector shows signs of consolidation, with positive effects on employment and investment (INE, 2024).	+ Growth due to high spending, especially on quality tourism; regenerative tourism and seasonal adjustment policies help to diversify the offer and improve the economic sustainability of the sector (Empresa Pública Turismo y Deporte de Andalucía, 2025).
Social Impact	Creation of seasonal and local jobs, but also the risk of gentrification	Negative impact on many small businesses and seasonal jobs	Recovery of domestic tourism and return to more balanced tourism	Inclusiveness and growth of regional tourism initiatives	Increased creation of skilled jobs and responsible tourism	Social benefits of including local communities in tourism projects

\* The 2024 datum is an estimate based on the first ten months and official projections (Smartdata Andalucía, 2024; Empresa Pública Turismo y Deporte de Andalucía, 2024).

Source: Junta de Andalucía (2020-2025), Instituto Nacional de Estadística (INE) (2020-2024), CaixaBank Research. (2020), OECD. (2021), Empresa Pública Turismo y Deporte de Andalucía. (2025).

Total arrivals indicate the number of tourists visiting the geographical area under consideration (data include arrivals from inside and outside the country). On the other hand, the total arrivals show the length of stay in Andalusia, data obtained by considering the nights spent in tourist establishments, and which may differ from the number of arrivals, as in this case, since visitors may extend their stay and not limit themselves to one (Díaz-Parra & Jover, 2021a). As we have said, the data we have just presented include all tourists, without distinction as to their origin; a distinction made by the National Arrivals and International Arrivals columns, which indicate the number of visitors from other Spanish regions and from other countries (European or from the rest of the world), respectively (Junta de Andalucía, 2025). As depicted in Table 3, these two values follow very different trends. Although domestic arrivals are greater in number than foreign arrivals, it is precisely the latter that show a much higher growth rate. On the other hand, domestic arrivals follow an increasingly downward parabola in the wake of the post-Covid recovery. This is repeated for National Presences and International Presences. The Average Daily Expenditure indicates the average amount of money spent by visitors in Andalusia, with amounts that may vary according to the type of activity carried out (seaside, cultural, rural tourism).

The hotel occupancy rate is a key indicator of the performance of the tourism industry. It reflects both seasonality and the effectiveness of promotional and deseasonalisation policies (Empresa Pública Turismo y Deporte de Andalucía, 2024).

Based on the statistics previously presented, the resulting trends are a logical reduction in arrivals during the pandemic period in 2020, with a gradual recovery in the following years to reach pre-pandemic levels in 2023 and 2024 (PP Andalucía, 2023). In terms of tourist arrivals, as could easily have been predicted, domestic arrivals have always been in the majority, but international tourism has not been idle, suggesting a gradual return to 2019 levels.

#### 4.8. Tourism forecasts for Andalusia

Andalusia is currently experiencing a favourable period of growth in tourism, which is laying the foundations for a renaissance process after 2020, and which aims to continue to improve in the future thanks to avant-garde sustainable tourism practices. In fact, the expansion of the sector will not end in the short term; on the contrary, future forecasts of its performance support the thesis of perpetual growth (PP Andalucía, 2023). This process will inevitably continue to have an impact on the territory, especially in the most urbanised and densely populated areas (Seville, Malaga, Granada), which will be under constant pressure from the abundant tourist flows, which in the long term could seriously affect local infrastructure and resources (Díaz-Parra & Jover, 2021a). While tourism offers economic opportunities, creating new jobs in the hospitality, trade and service sectors, it could also lead to gentrification, particularly in the central areas of cities, altering the social fabric and increasing housing costs. From an economic point of view, tourism will remain unchanged in the coming years and will maintain its *status* as a fundamental pillar for an increasing regional GDP, as it has in the past and continues to do today. A desirable future trend, with further diversification of supply (e.g., into food and wine and cultural activities), could encourage greater deseasonalisation and allow for a more even distribution of tourist flows and income from these activities. Of course, the forecasts are not all positive, as the region will continue to face challenges. These include the well-known risk of gentrification in the most attractive districts of large cities, or the risk of seasonal fluctuations and increased vulnerability of the regional economy if it becomes too dependent on the tourism sector (CaixaBank Research, 2025). Therefore, from a long-term planning perspective, these future scenarios will have to include the adoption of sustainable management policies and a development plan that is attentive to the preservation of cultural authenticity for the benefit of local communities, as well as the enhancement of tourist destinations to satisfy visitors.

Based on current tourism trends and future projections in Andalusia, it has been possible to estimate the likely evolution of the sector until 2030, both in terms of sustainability and the continuation of lay tourism practices (Junta de Andalucía, 2023c). Graph 4 illustrates the percentage distribution of mass and sustainable tourism in Andalusia from 2019 to 2030, incorporating historical data from 2019 to 2024 and projections from 2025 to 2030. Data was collected from official regional sources (Junta de Andalucía, INE and sector reports) to monitor the proportion of tourists choosing sustainable tourism offers. Therefore, the basic assumption is that the region will gradually implement policies specifically dedicated to sustainability, and that tourist preferences will always be in favour of ecological, cultural and authentic experiences; all this, of course, without considering damaging extraordinary events such as the pandemic. In the meantime, the forecast from 2025 to 2030 was obtained by observing a constant increase in demand for sustainable tourism from real existing statistics. This generated an annual increase in the share of sustainable tourism of about 2% compared to mass tourism, which decreased at the same rate. Considering the current starting conditions and the desirable assumption that more and more sustainability policies are implemented, Linear Trend Models can be used to create Forecast Models in which the future projection maintains constant growth. This analysis by the authors gives rise to Graph 4, which shows the growing interest in “greener” practices in the sector (green line). The outlook does not change from 2025 onwards; on the contrary, it follows an upward trend until at least 2030, when it will account for 30% of tourism preferences in this area (the dotted line represents the forecast).

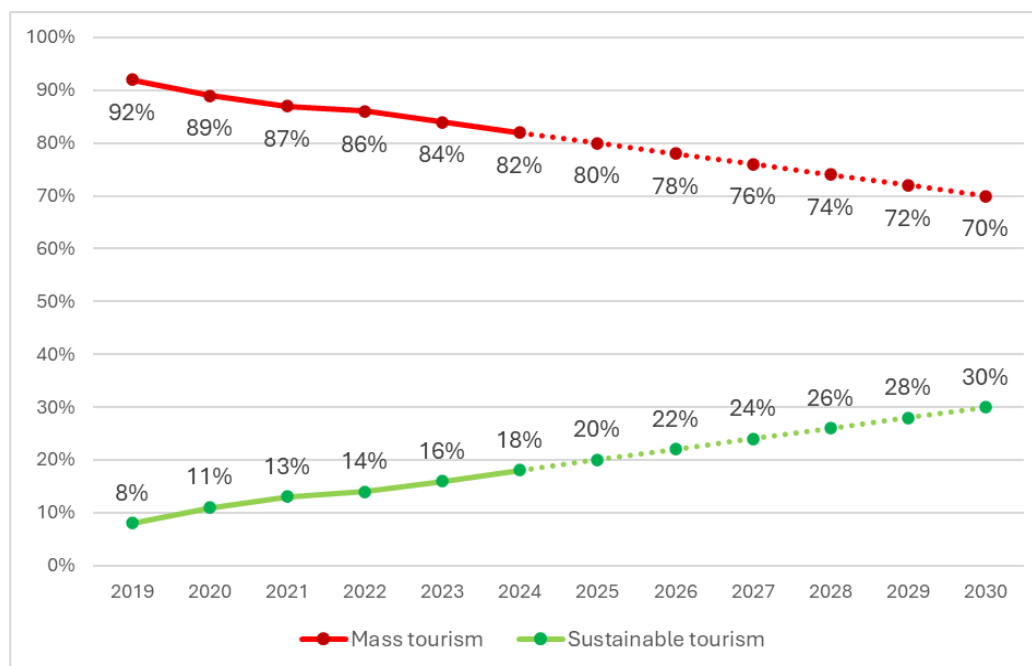


Fig. 5 – Mass Tourism vs. Sustainable Tourism.

Source: Authors' elaboration from Junta de Andalucía, (2023), Andalusia World (2024).

As shown in Figure 5, the forecast of continued growth takes on the characteristics of linear growth with a stable trend:

$$T(t) = T_0 + r \cdot t \rightarrow T(2025) = 8 + 2 \cdot 6 = 20\%$$

Where  $T$  is what we want to find, i.e., the percentage of sustainable tourism in the year of interest ( $t$ ).  $T_0$  is the percentage of the same factor (sustainable tourism) at the beginning of the observations (in the first year, i.e., 8% in 2019).  $r$  is the annual growth rate of the factor considered, i.e., 2%.  $t$  indicates the number of years between the year of interest of the calculation and the starting year of the analysis.

On the other hand, the flow of mass tourism (red line) shows the progressive reduction in favour of the other party. In any case, it cannot be said that traditional holiday patterns will disappear over time.

The elements that have led to these forecasts are:

- The use of strategic plans (META Plan) and the intensification of public policies to support local identity and the enhancement of the territory, which are good tools to encourage the spread of sustainable tourism.
- The continued growth of sustainable tourism and the differentiation of the tourist offer, as the Andalusian region has already shown that it can invest in atypical forms of attracting visitors and to satisfy them; it is therefore logical to expect an improvement in the coming years.
- Consumers are increasingly aware of the need to reduce their impact on the environment and prefer “natural and/or cultural experiences” to typical mass tourism destinations.
- Climate change may affect the type of activity desired, redirecting visitor flows and reducing the seasonality of attractions. For example, rural and ecological tourism or visits to museums and monuments could be chosen to escape the excessive heat.
- Technological innovations, which are too present in everyday life to be excluded from the influencing factors. Digital solutions for monitoring sustainability and optimising the tourism experience could speed up the transition.

## 5. CONCLUSIONS

Therefore, this article has provided an in-depth study of the Andalusian tourism sector, which plays a fundamental role in the great economic activity of the Autonomous Community and at national level, since the charming provinces of Andalusia are among the most attractive and favoured destinations for national, European and international travellers. The region's heritage is rich in natural resources, history and the diverse cultures of successive civilisations, as well as excellent gastronomy. However, all that glitters is not gold; in other words, Andalusian tourism is not only a source of potential and identity, but also a source of issues. In fact, the entire region benefits from good sustainability programmes that are producing excellent results in the tourism sector, which in turn have a knock-on effect on other economic activities closely linked to the tourism dynamic. The solutions promote an idyllic and balanced scenario with the good intention of mitigating both aspects: on the one hand, the growth of the sector and its prosperity through customer satisfaction and, on the other hand, the full protection and preservation of the territory, traditions and culture of the region, in full respect of sustainability.

It would not be a false claim to say that the path taken by Andalusia is a fruitful one and will lead to the desired objectives, given the appropriate timing of long-term planning. As the graphs in the previous section on the development of tourism show, the sector is effectively recovering after the unfortunate pandemic interlude, and there is also evidence of the progressive growth of more sustainable forms of activity, reducing the often-negative impact of mass tourism. This thesis is further supported by forecasts of future trends in the tourism industry, with "green" practices continuing to make inroads and taking market space away from traditional tourism.

Beyond the sectoral statistics, the demographic aspect of the issue cannot be ignored, since the tourist wealth of the Andalusian provinces is as much an asset as a liability. Research in this area has also led to the conclusion that tourism is as important as it is poorly supported by the population. On the one hand, regional authorities and operators in the sector have an interest in broadening and consolidating the potential attractions to be more successful and generate new wealth, but on the other hand, communities do not seem to welcome tourism promotion strategies. It is not uncommon for local people to take a stand against the influx of visitors, unfortunately not always with peaceful behaviour, demonstrations or protests. The result, however, is not a reduction in the number of travellers, but only discontent among the locals, especially the older generations. Local anti-tourism propaganda plays on the overcrowding and degradation of ecosystems that accompany short holidays. As a result, promotional and educational campaigns to encourage tourists to respect the places they visit and the communities that host them are becoming more widespread, with notable results. However, the process of local degradation is not so easily halted, as the problem is not only reported by external visitors. A clear example of this is the numerous celebrations of local traditions, typical events of Andalusian culture, which attract large crowds, including curious tourists, but above all citizens of the region itself. At the end of the festivities, however, a great deal of dirt, both organic and inorganic, is left on the streets, which inevitably leads to a greater use of urban cleaning resources and increased pressure on infrastructure. In light of the above, the influx of tourists during the high season is very high, but it is not the only one responsible for the problems that can develop in the area, since there is inevitably the participation of the citizens themselves.

The Autonomous Community's solutions in the field of tourism consist of appropriate measures to combat overcrowding and the risk of losing cultural authenticity, which have become the subject of strategic programming and planning. To the extent that the interest of the economic operators is to promote sustainable tourism, these measures are aimed at managing and distributing the massive load of visitors throughout the year and in many more destinations, which is otherwise concentrated in certain periods depending on the predominant tourist activity in the locality, renewing the tourist offer and promoting varied traditional and alternative experiences.

Observations on the tourist strength of Andalusia do not end with a snapshot of the current performance and sustainable practices, but are open to further research and study, as well as monitoring the real future performance of tourism in Andalusia.

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