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Tourism in Andalusia (Spain): an update from a geographical analysis


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The aim of the article is to offer an evolutionary analysis of the reality of tourism in the Autonomous Community of Andalusia (Spain) during the period 2008-2022. From a general perspective, the interest of the study carried out is based on the fact that the deep changes in tourism dynamics in recent years have been particularly intense at the more detailed scales. And, in regard to this, from a more specific perspective, a great scarcity of studies has been detected for Andalusia, a particularly surprising fact considering the relevance, complexity and diversity of tourism in this region.

The study is based on a geographical approach. In this sense, among the various dimensions of the tourism phenomenon that can be covered by geographical research -supporting resources, tourist typologies and modalities, physical, social and economic territorial impacts, planning and management processes, etc.-, the dynamics based on the supply-demand dialectic are addressed, with the aim of offering a synthetic vision of the tourism reality of the study area.

From an epistemological and methodological point of view, we reflect in depth on the value and representativeness of these traditional variables (supply and demand) for the territorial-tourist study. In this sense, the traditional consideration of accommodation as a key vector comes from its identification as a basic offer, to a large extent a legacy of the sun and beach model, as opposed to what has been considered as a complementary offer, focused on those elements that generate alternatives and experiences on the ground. Despite the fact that, strictly speaking, what has generally been understood as complementary supply currently constitutes the essence of many tourism practices, the fact is that its diversity and heterogeneity (and also that of its demand), as well as the absence of complete and homogeneous statistics, make it extremely difficult to analyse, at least on a national or regional scale, as is the case in this study.

For this reason, and due to the greater availability of regulated data, we have opted in this article to deal with the supply of accommodation and its demand, applying an analytical method that represents an



advance on previous contributions from Spanish tourism geography. In this respect, the detailed analysis of the official sources of information available in the Spanish and Andalusian case and the reflection on their scope and usefulness has enabled the contribution of a proposal of indicators that is equally applicable to similar studies relating to other spatial areas. These indicators are, in the case of supply, the number of bedplaces, their relationship with the population (which makes it possible to determine tourist specialisation) and the number of bedplaces by type of accommodation; in the case of demand, we have considered the number of travellers (lodged), the number of overnight stays (as a more representative variable than the previous one), analysing the origin, the type of accommodation and the relationship with the local population (in order to measure tourist density), and, finally, two variables relating to the specific behaviour of visitors: average stay and expenditure per tourist.

The application of these indicators to the analysis of tourism in Andalusia over the last 15 years has yielded interesting results. These have been reflected on a regional scale, although with specifications on a provincial and municipal scale when the sources have made this possible. In general terms, it has been possible to confirm the consolidation and reinforcement of Andalusia as a highly relevant tourist area during the period under study (2008-2022), based on a growth in the basic indicators of supply and demand. Together with this general dynamic, some elements of specificity and processes of change and restructuring have been verified which are certainly significant and interesting, both in the internal conformation of supply and in certain patterns of behaviour of demand.

With regard to supply, it has been confirmed that Andalusia has a significant quantitative weight (in absolute terms and in Spain as a whole), although its relative value (ratio of supply to population) shows that its specialisation is not excessive, placing it in an intermediate position in Spain, although with clear disparities between the region's provinces.

The supply of accommodation has been experiencing significant growth, which has not even been altered by the COVID-19 pandemic. This is largely explained by the recent irruption (since 2016, when they began to be officially registered) of the new types of tourist accommodation: tourist houses (VFTs) and rural tourist houses (VTARs). This has been particularly relevant in the case of the first ones (VFT) which, since 2018, have widely surpassed hotel establishments, until then very dominant in the Andalusian panorama, in terms of number of accommodation places. The lack of information on tourist houses in the statistics of the National Statistics Institute (as surprising as it is questionable) makes it impossible to make a reliable comparison between Andalusia and the rest of the Spanish regions.

Regarding to the territorial distribution of the supply of accommodation within Andalusia, it has been observed that this continues to be quite unequal, being highly concentrated on the coast, where Malaga stands out above all, as has traditionally been in the Andalusian region. However, there has been a recent move towards a greater rebalancing in the geographical distribution of supply, with an increasing importance of other coastal sectors and also of a series of inland areas, mainly urban, but also some particularly dynamic rural areas. In contrast, a large part of Andalusia still has a low volume of accommodation supply, although in most municipalities there has been a slight increase in supply in recent years.

In the case of demand, there has also been a constant and progressive increase, after the relative decline resulting from the financial crisis of 2008. But, in addition, as a particularly significant fact, it is worth noting that this increase has experienced a great intensification after the COVID-19 pandemic, which includes both Spanish tourists (who have reached their historical maximum in 2022) and foreign tourists (who also show a very significant post-COVID recovery, although somewhat slower). This phenomenon seems to point to the beginning of a new cycle of intense tourism expansion, both in Andalusia and, of course, on a more global scale. This is one of the most interesting conclusions of this work, the scope of which will in any case have to be followed up and verified in subsequent studies.

In relation to the above, tourist density (i.e. the ratio of tourist overnight stays to the local population) reflects a general increase in Andalusia in recent years, as the result of growing demand pressure. However, the article has highlighted the impossibility of a truly detailed knowledge of this variable, in view of the almost total absence of data on overnight stays at local level for all types of accommodation, except hotels (for example, no data is provided for tourist houses, despite their recent strong growth). The need to improve



the sources of statistical information (mainly on demand) is undoubtedly another of the main conclusions of the study carried out.

The new upswing in tourism that seems to be taking place is accompanied by other unique factors, such as the diversification of inflows (in terms of origin and destinations), the increase in daily expenditure and the parallel fall in the average length of stay. Statistical analysis has shown that tourists are coming to Andalusia more, spending more, but staying less time during their visits. This is associated with new, more flexible tourism practices, but it would be essential to be able to determine the specific influence of the territorial reality and, at the same time, the impact on it and the possible strategies to be implemented (diversification and adaptation of the offer, combination of tourist typologies, greater connectivity between nearby destinations, etc.).

With regard to the latter, the final part of the paper highlights the urgent need to undertake more detailed studies, both in terms of the scale of the analysis and in terms of the subject matter, which would allow for an in-depth study of many of the situations identified in this work. Aspects such as the decline in the average length of stay, the existing disparities and imbalances in the supply of accommodation (with the consequent need for a better geographical distribution of activity), or the question of new accommodation typologies and their spatial projection are highlighted, among others, as aspects of great interest. But reference is also made to other very relevant realities which, although not directly dealt with in this paper, should be analysed in the short-medium term in order to complement the panorama offered in it; among them, the question of non-regulated accommodation, non-accommodation supply and demand, and the organisation and planning of the Andalusian tourist space.