


Article

English, German, and French Tourists Are Key to the Success of Andalusian Destinations (Spain)

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Abstract: Why was this research undertaken? Because in some tourist destinations the number of international tourists has a greater impact on the number of overnight stays at hotels compared to domestic tourism. The aim of this study was to analyse the main tourist market segments in destinations in Andalusia from 2004 to 2022, to demonstrate the relevance of, and dependency on, the tourism industry in this territory. The methodology used in this research collected secondary data from Spanish and Andalusian public organizations (IECA, INE, SAETA and AENA), and information related to this topic from researchers and organizations (primary data) to select specific indicators and to draw the appropriate conclusions. The findings of the current study reveal that English, German, French, Italian, Belgian, and American tourists are the main markets of the Andalusian provinces and their hotel establishments. In addition, these three segment markets depend on the air accessibility and connectivity provided by Andalusian airports. Moreover, it should be remembered that domestic tourism generates 35.1% of the overnight stays at Andalusian hotels. Domestic tourism helped the hoteliers of Andalusia to survive the pandemic crisis when inbound tourism dropped to zero. Andalusia constitutes an interesting case of study because it attracts a large amount of tourism demand. Although English, German, and French markets monopolize the number of overnight stays, DMOs need to attract tourists from other countries to diversify the tourism demand.

Keywords: tourists; hotels; airports; accommodation; hotel occupancy rate; passenger arrivals; overnight stays



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1. Introduction

The destination of Andalusia and its eight provinces—Almería, Cádiz, Córdoba, Granada, Huelva, Jaén, Málaga, and Seville—is one of the most visited tourist destinations in Mediterranean countries by 30 million tourists annually [1]. Tourism represents 13% of Andalusia's Gross Domestic Product (GDP) and is the main sector of the economy in this territory according to the IECA known as Instituto de Estadística y Cartografía de Andalucía [2]. The success of the Andalusian destination can be attributed in part to the development of effective marketing strategies and promotion campaigns through digital channels by Destination Marketing Organizations (DMOs) to promote the tourism products and services of Andalusian provinces worldwide [3]. The main issuing markets of international tourists to Spain are England, Germany, and France [4]. Andalusia's brand image is considered an important factor to establish links with English, French, and German consumer segments [5].

In 2020, the COVID-19 pandemic paralysed the tourism industry in Andalusia [6]. If we add to this Russia's invasion of Ukraine, Brexit, and a period of economic stagnation in the Eurozone due to the high price inflation of basic commodities [7,8], the tourism industry in Andalusia could have been affected in terms of numbers of tourists, passengers, and overnight stays. Instead, the most recent data reported by AENA [9] reveal a recovery in the air transport sector in Andalusia. As at May 2023, the Málaga Costa del Sol airport (IATA code: AGP) and Seville airport (SVQ) have surpassed pre-pandemic figures in number of passengers, showing a growth of 16% and 17%, respectively, in comparison with the year

2019 [9]. A study carried out by the Andalusian Tourism Analysis and Statistics System (SAETA) revealed that Andalusian hotel establishments reached an occupancy ratio of 82% in May 2023; this figure exceeds both the occupancy percentage of 2022 and those reached before the COVID-19 pandemic [10].

In times of a bonanza, tourism propels the rest of the economy. In difficult times, multiplicative effects turn negative and provoke a massive drop in tourism demand [11]. Wang et al. [12] suggest that the seriousness, magnitude, and duration of the pandemic effect have not been thoroughly examined in the hospitality industry. For this reason, it is so important to analyse the tourism industry at tourist destinations to monitor tourism demand and supply and to correct possible errors or incidences. The understanding and classification of tourist market segments in DMOs' marketing plans is very important to design marketing strategies and promotion campaigns through digital channels in the main tourist generating markets [13]. The aim of this study is to analyse the main tourist market segments in Andalusia destinations from 2004 to 2022, to demonstrate the relevance of, and dependency on, the tourism industry in this territory.

2. Theoretical Overview and Relevant Data

2.1. Tourism Supply Indicators of Andalusian Territory

Tourism flow refers to the directed flow of tourists between attractions and routes which reveals the spatial behaviours and flow patterns of tourists [14]. Tourism supply indicators help to design and improve the effectiveness of marketing strategies based on differing segments' responses. Hence, to understand tourism flows, destination indicators inside a region or country must be identified [15]. If one wants to measure the tourism demand for a city, the number of passenger arrivals at airports and overnight stays at hotels by tourists are excellent indicators [16]. In 2022, the distribution of passenger traffic by European countries in the Spanish airport network was: UK with 26.2%, followed by Germany (16.9%), France (10.1%), Italy (9.3%), Netherlands (6%), and the rest of Europe with 31.5% [17]. Commercial airlines (low-cost carriers and legacy carriers) provide the air corridor and passenger arrivals between UK airports and Andalusian airports [18].

In order to achieve the research objective, this study will analyse the Almería Antonio de Torres airport (code: LEI according to the International Air Transport Association (IATA)) [19], Jerez (XRY), Federico García Lorca Granada-Jaén (GRX), Málaga Costa del Sol (AGP), and Seville airport (SVQ) in terms of number of passenger arrivals and location (see Figure 1). GRX airport is strategically shared between the city of Granada and Jaén to make these two provinces more accessible, but unfortunately this strategic airport is not achieving the results hoped for by the airport operator and these two cities. In this research, we do not examine Córdoba airport (ODB) because this aerodrome operates only for agricultural treatment companies, military flights, aerial photographs, and passenger charter flights.

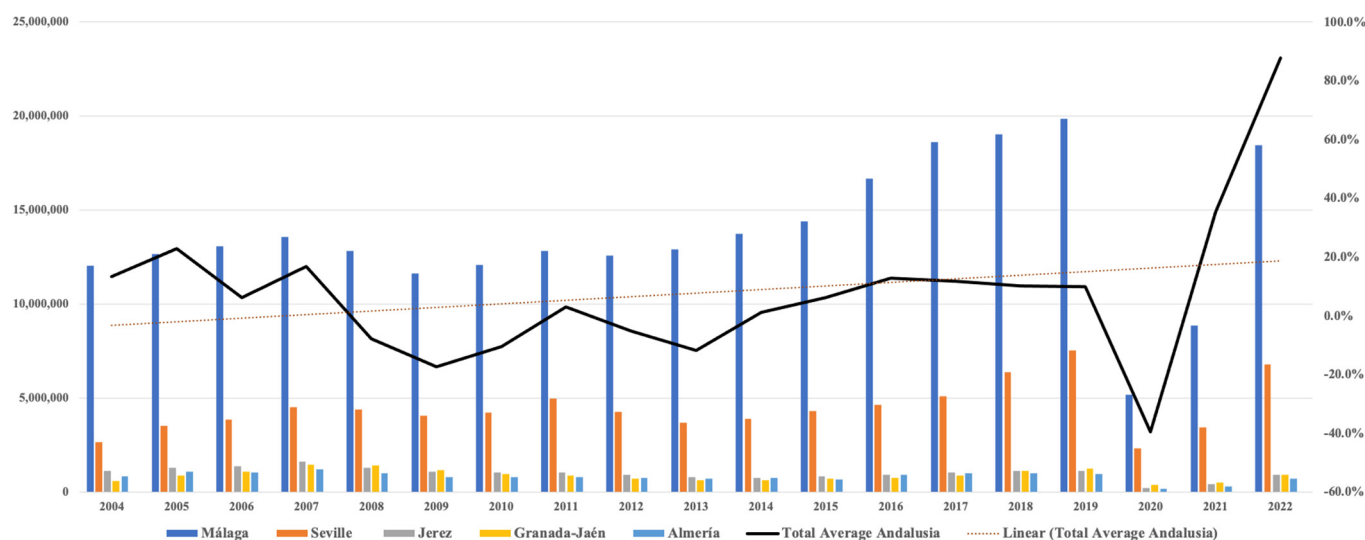


Figure 1. Number of passenger arrivals at five Andalusian airports (2004–2022). Source: Own elaboration from AENA [20].

All Spanish airports are managed and operated by AENA (Spanish Airports and Airspace), which is the world's number one airport operator in terms of passenger traffic. In 2020, the COVID-19 pandemic affected Andalusian airports more severely than the global financial crisis in 2008 because the coronavirus impacted on the health and safety of persons, whereas the financial crisis mainly influenced people's pockets. The consequences of Andalusian airports' inactivity in this period had a negative impact on the number of passenger arrivals (see Figure 1), commercial airline bankruptcies, and the closure and selling of hotels across the Andalusia region. The number of hotels for sale in Andalusia increased by 45%, and 557 hotels were on sale in Spain in October 2020 [21].

Airports influence total tourist arrivals at touristic accommodations, including guests from domestic and abroad [22,23]. Figure 1 shows that Málaga airport is the hub and the main gateway for passengers to Andalusia. This airport received more than 261 million passengers in the period analysed. The new terminal building and the new runway of Málaga airport attracted additional international tourists, especially those flying with low-cost carriers [24]. Seville airport is the second in Andalusia in passenger terms, followed by Jerez, Granada-Jaén, and Almería airports. In addition, the total average number of passenger arrivals at Andalusian airports has continued to grow (except in the year 2020) in the period established, with 21% in 2023. The air accessibility provided by these five airports and airlines is part of the success of Andalusia as a global tourist destination benchmark for international tourists. Excellent accessibility and a solid tourism infrastructure places Andalusia in a good position to capture different tourism flows around the world [25].

Airports, low-cost carriers (LCCs), and the legacy full-service network carriers known as legacy carriers are drivers of tourism development at tourist destinations; in particular, LCCs are key in attracting international tourism flows in Andalusian regional and tourist airports [26,27]. Alderighi and Gaggero [28] revealed that a supplementary round-trip flight operated by an LCC generates about 74 passenger arrivals and 248 overnight stays in hotels. The number, frequency, and capacity of flight connections provided by airlines directly influence the level of tourism demand and overnight stays in accommodation [29]. Moreover, airports and airlines are fundamental variables for regional economies and the growth of numbers of tourists in cities [30].

Other indicators measured in this research are the numbers of hotels and rooms estimated from 2004 to 2022 (see Figures 2 and 3). The majority of the hotel supply is centred on the Andalusian coast. The province of Málaga is the one that provides the biggest number of hotels in the Andalusian region with 639 establishments in 2022, followed by Cádiz with 528 hotels, and Granada with 325 hotels. Nevertheless, while

Málaga and Cádiz occupy the first two places by number of rooms estimated, the city of Almería is the third biggest due to the fact that its hotels are bigger than Granada's hotels, and therefore have a larger number of rooms. The hotels in Andalusia display the most inelastic demands for almost half the seasonal periods. In the case of the Málaga hotels—an area with the highest number of tourist arrivals in Andalusia—the demand is usually more elastic in June and the first half of July [31].

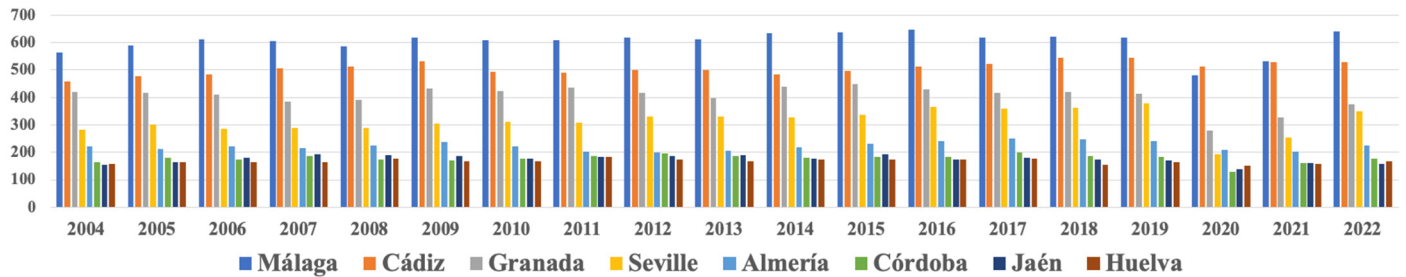


Figure 2. Number of hotels, by Andalusian province (2004–2022). Source: Own elaboration from IECA [2].

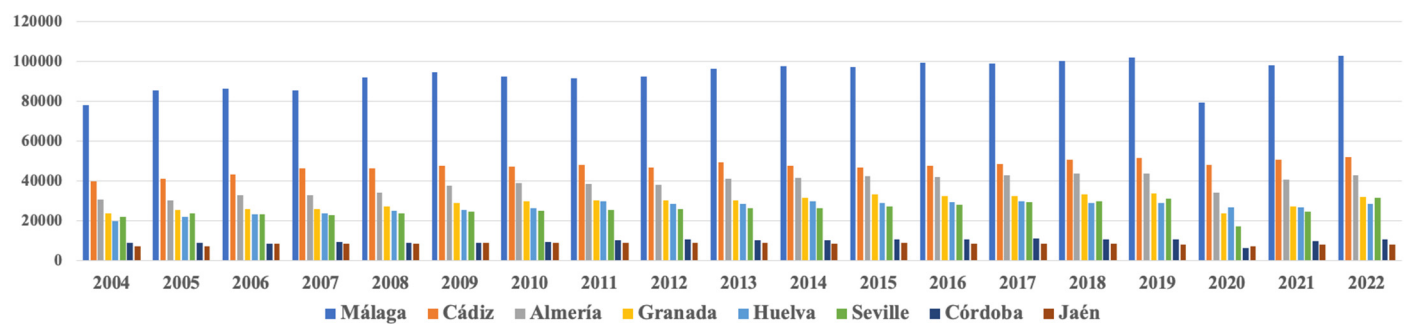


Figure 3. Estimated number of rooms, by Andalusian province (2004–2022). Source: Own elaboration from IECA [2].

Hotel supply is measured in terms of room stock, and its demand can be measured in a variety of ways, including occupancy percentage and room rates [32]. This research uses two indicators of hotel accommodation. These data were provided by the Instituto de Estadística y Cartografía de Andalucía known as IECA [2,33], which has made it possible to classify the types of accommodation and tourists' motivation in Andalusia. The purpose of including these two indicators in the study was to evaluate the hotel offering at Andalusian destinations, because the hotel industry has a great significance in a tourist's average daily spending. Hotels represented 58.4% of accommodation by type in Andalusia in 2021, and the overwhelming majority of tourists (85.5%) travel to Andalusia for holidays and leisure motivations [33,34]. Tourists' motivation and behaviour are major factors for competent authorities to define forms of communication with clients or for business support [35].

2.2. Indicators of Tourism Demand Empirical Evidence from Other Studies

The degree of diversification of each destination's market segments requires first to identify the compatibilities of the market segments with the tourism supply offered, as well as the potential market that a destination may attract [36]. Andalusia's eight provinces are attractive destinations for various segments of the tourist market (UK, France, Germany, Italy, Netherlands, Portugal, amongst many others) because these offer a wide and diverse range of tourism options such as sun and beach, cultural, adventure, sport, and business activities. The diversification of tourism supply provides a means of attracting tourists during the off-peak tourism season [37]. The treatment of seasonality in marketing strategies by DMOs is a key factor for designing promotion campaigns through digital

channels and increasing the number of tourists in the low season. The tourist destination of Andalusia is characterized by its high seasonality from April to October, and the low season is located between November and March [38].

Moreover, the proximity of Andalusia to European countries by aeroplane in less than four hours favours its chances that European people want to visit this tourist destination. Tourist arrivals in a destination is the traditional and most widely used measure of tourism demand. Air transport connectivity has a great influence on tourist flows due to its speed, safety, service quality, and reliability [39]. Passenger arrivals data can lead to more precise estimates, and these data are essential to analyse the evolution of tourist arrivals in the time series [40]; passenger arrivals as an indicator is widely used in tourism and aviation studies [23,41]. International tourist arrivals is the key indicator of tourism demand and the most popular proxy for tourism demand in the tourism literature. Passenger arrivals is an indicator which helps to identify direct and indirect differences in the quantity of tourism demand within a defined period of time at destinations and hotels [39,42,43]. Tourism demand for a particular destination is the quantity of tourism goods and services that consumers are willing to purchase during a specified period under a given set of conditions [44].

Notwithstanding this, during the pandemic period, tourism demand dramatically decreased due to the restrictions in air transport and the closure of hotels and restaurants. These negative consequences also have generated an increase in airline fares and hotel tariffs [45,46]. In order to restore the tourism and aviation industries in these eight cities, in 2021 Andalusia's DMO promoted its eight provinces in eight European destinations (Portugal, Ireland, UK, the Netherlands, Sweden, Germany, Italy, and France), through digital channels (social media, YouTube, and TV), shopping malls, sporting events, the World Travel Market, and ITB Berlin, amongst many others. These eight source markets represent close to 40% of total stays in Andalusian hotel establishments and around 70% of overnight stays made exclusively by international travellers [47,48]. For this reason, DMOs and hotel operators traced consumers' demand patterns and occupancy rate to stimulate tourism demand [49,50]. The data on the occupancy rate of Andalusian hotels by province were collected from the IECA organization and contains annual and monthly aggregated occupancy rates of hotel classes from 2004 to 2022.

The hotel occupancy rate is also one of the important considerations for us to measure the impact of tourism demand at hotels. Of particular interest to the hotel industry is assessing the impact of accommodation supply on key hotel performance indicators [51–53]. Supply and demand imbalances in hotel markets cause short-term growth or declines in rate and are inefficiently self-correcting over the long term [54]. Figure 4 presents the hotel occupancy rate by province; the province of Málaga provides the best average occupancy rate (78%) in the period examined, followed by Cádiz (77.9%), Huelva (75.1%), Almería (74.3%), Granada (56.1%), Seville (50.3%), Córdoba (45.6%), and Jaén (36.8%). The Andalusian provinces' hotel occupancy rates have obviously fluctuated in the last 19 years, but the effects of the pandemic crisis were very harmful to the hotels and tourists in 2020, more so than the financial crisis in 2008, as we can see in Figure 4.

The number of overnight stays at hotels is another Key Perform Indicator (KPI) or metric that measures the performance of a particular area of hotel operations or overnight stays. In this research, we assess the number of total overnight stays, both foreign and Spanish, to classify and account for the main tourist segments by province. The hospitality industry's marketing plans use different strategies for national and international markets to increase the number of overnight stays and consumers' expenditure [55]. This ensures clear visibility on the functionality of hotels at tourist destinations [56].

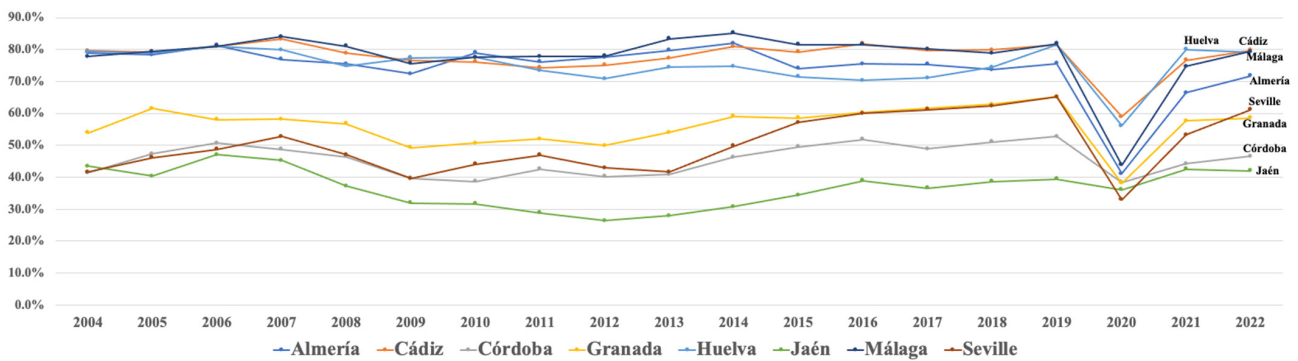


Figure 4. Hotel occupancy rate, by Andalusian province (2004–2022). Source: Own elaboration from IECA [2].

It is important to highlight that in comparing the results across domestic and foreign tourist arrivals and overnight stays in most destinations, the COVID-19 pandemic had a greater potential adverse impact on passenger arrivals and foreign tourist overnight stays [57,58]. Tour operators and DMOs need to monitor the passenger arrivals and overnight stays at hotels in their decision-making processes to maximize the economic benefits of tourism spending [59]. Tourists who use Online Travel Agencies (OTAs), tour operators, DMOs' websites, social media, and digital newspapers prior to visiting tend to spend more during their stay [60]. This implies that attracting this target market to specific destinations and periods of the year, and satisfying it, should be achieved through tailor made offerings.

3. Methodology

3.1. Research Area

This research has been focused on the region of Andalusia, southern Spain. Andalusia is a consolidated tourist destination, and this is grouped into 8 provinces: Almería, Cádiz, Córdoba, Granada, Huelva, Jaén, Málaga, and Seville. Seville is the capital city of Andalusia. Andalusia's coastline has a length of 1101 km. The coasts that form the Andalusian coastline are the Costa de Almería, the Costa Tropical of Granada, the Costa del Sol of Málaga, and Costa de la Luz of Huelva (see Figure 5). Its three most important tourist attractions are sun and beach activities, gastronomy, and an excellent climate which is both sunny and refreshingly cool with a minimum of 300 sunny days a year [38,61,62]. Andalusia's coastline has 263 beaches [63] localized in Almería, Granada, Málaga, Cádiz, and Huelva. Most hotels are localized in these five provinces thanks to international and domestic tourist demand. According to Sarrión-Gavilán et al. [64], the coast is the most important focus of tourism in Andalusia and the most traditional areas remain the western Costa del Sol, west Almería, and the Bay of Cádiz.



Figure 5. Location of the research (Andalusia and its eight provinces). Source: Own elaboration.

3.2. Data Collection and Indicators Selected

This study uses quantitative method to measure supply variables such as the number of airports, number of hotels, and estimated number of hotel beds. The five indicators of demand analysed (airport passenger arrivals, hotel occupancy rate, total overnight stays, and overnight stays at hotels by international and Spanish tourists) are shown in Figure 6 to better understand the eight variables examined. All of the indicators implemented in this research have allowed us to tackle the main goal of this study. The time from 2004 to 2022 was the period analysed in this study because the global economy began to recover in 2010 from the financial crisis of 2008; in fact, the IECA organization provided data related to the overnight stays at hotels from 2004 to the present. Furthermore, this research tries to compare data from 2019 to 2022 with the aim of measuring the impact of tourism demand before and after the COVID-19 pandemic.

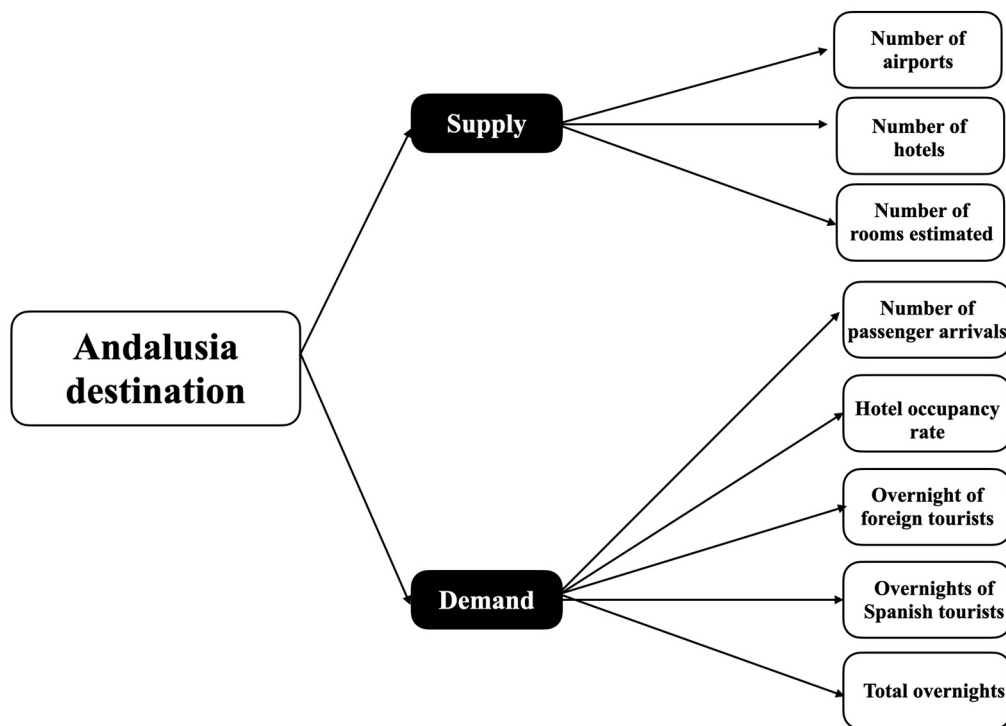


Figure 6. Supply and demand indicators (2004–2022). Source: Own elaboration from IECA [2], and AENA [20].

To illustrate the application of our methodology, we chose the tourist destination of Andalusia for three reasons: first, tourism is a strategic sector for Andalusia and its eight provinces, representing 13% of GDP in 2019 [2,65,66]. Second, Andalusia has nearly 2700 hotel establishments, offering more 308,000 rooms in 2022. Third and last, Andalusia has a highly diverse group of origin markets, with international markets representing 52.6% of the overnight stays in Andalusian hotels in 2022, and a 17.8% of Spanish overnight stays [67].

The data used in this work combine information coming from different statistical sources. In the period analysed, more than 35,320 observations were examined, that is, data per year and indicators assessed. To collect data, we used supply and demand data according to the IECA, INE, and AENA organizations (secondary data). To count the number of passenger arrivals at Andalusian airports, data were collected from Aeropuertos Españoles y Navegación Aérea, commonly known as AENA [20]. The rest of the indicators such as the number of hotels and rooms, hotel occupancy rate, and overnight stays at hotels by international and national tourists were collected from IECA [2,33], and INE [66,67]. It is important to note that this research provides updated data from 2022, which has

helped to contextualize and measure the pandemic effects and compare them with those for earlier years.

Furthermore, this study collected information related to this topic from researchers and organizations (primary data) for the purpose of this research project. For example, public and private organizations, and expert authors in this topic, have helped us to select and collect specific indicators to improve the methodology of this research and to draw the appropriate conclusions [10,29,51–53,55]. Primary data improve researchers' understanding on the indicators and methods selected [68]. Primary and secondary data are significant inputs into appraisal and market analysis. Both forms of data are entered in the analysis that underpins our study [69,70]. In the following subsections, we present eight tourism indicators examined from the viewpoint of the demand side.

The main advantage of combining primary and secondary data used as a methodology for our analysis and the indicators selected in this study lies in the staging of different variables and sectors, and what role these indicators play in shaping patterns of communication and tourism promotion campaigns developed by DMOs and hotel operators to revitalize Andalusia's tourism demand and supply in difficult times. Conversely, the different indicators identified from different sectors of demand and supply such as hotels, airports, public organizations, or Spanish and international tourism flows make us see the difficulty in addressing the impact of tourism demand in the eight Andalusian provinces and its real impact in economic and strategic terms.

4. Findings and Discussion

4.1. *The Main Tourist Segments in the Eight Provinces of Andalusia*

It is important to understand the different characteristics of the eight provinces of Andalusia. For example, Huelva, Cádiz, Málaga, Granada, and Almería are tourist destinations focused primarily on sun and beach and gastronomy activities because of their excellent beaches and location, but Málaga perfectly combines sun and beach and urban tourism as an added tourist attraction thanks to its more than 20 museums, Málaga cathedral, Málaga's Roman theatre, and the Alcazaba fortress, amongst many others. In 2022, this city received a total of 12.8 million tourists (−2.1% in comparison with 2019) and it has broken the revenue record by 18.3% by reaching EUR 17 billion [71].

Most international tourists have a huge misconception of Andalusia and its eight provinces; they think that these cities only offer sun and beach tourism [61], but they are totally wrong, possibly because the DMOs of Andalusia have not promoted the highly varied tourism offering very well in the last few years. Andalusia as a destination does not mean only the beach; its wealth comes from different tourist activities that allow tourists to enjoy the environmental diversity of the region. Andalusia and its eight provinces is a multi-space that brings together all the classifications of tourist activities because each province has its own peculiarities.

Notwithstanding this, Seville, Córdoba, and Jaén are tourist destinations focused on monumental, cultural, and urban tourism, and cynegetic and rural tourism in the case of Jaén province. These three cities do not have beaches. The diversification of products and services is a deseasonalization tool, but also a strategy recommended for tourist destinations, particularly in cultural tourism [38]. The following shows the analysis and results from each Andalusian province in alphabetical order. Figure 7 presents the number of overnight stays by province and country of origin of travellers. In this study, we selected the main relevant markets that provide overnight stays for each city from 2004 to 2022.

The core market segments of the city of Almería by country was the UK with 6.3 million overnight stays in the period established, followed by Germany by 4.1 million overnight stays, Belgium with 2.7 million, and France with 1.2 million. Sweden, Netherlands, and Italy are low with 1 million overnight stays, but these tourist segments contribute to enhance the diversification of tourism demand in this territory (see Figure 7A). In the period analysed, the number of hotels increased by 1%, and the number of hotel rooms increased by 41% due to the construction of 10 new hotels along the coast of Almería in recent years. This

moderate rise in the number of hotels is a consequence of the pandemic crisis during 2020 and 2021, and this period of uncertainly paralysed investment on new hotels. This problem is a constant in Andalusia and its eight provinces between 2020 and 2022. For this reason, sometimes we compare all data in both years 2021 and 2022 in comparison with 2019 in this study, due to the pandemic crisis which stopped the positive evolution of tourism industry in Andalusia and around the world in the year 2020. For instance, in 2022 the Andalusian destinations received 30 million tourists, which is 55.3% more than the previous year, that is, 10.5 million tourists more than in the year 2021. However, although 30 million tourists is a good number, this figure is fewer than the 32 million tourists that the Andalusian destinations received in 2019. It is clear from the findings that the pandemic had a significant impact on the aviation and hospitality industry and paralysed dramatically the tourism demand in Andalusian tourist destinations [72,73].

Regarding the number of overnight stays in the province of Cádiz, German tourists make the largest number of overnight stays in this tourist destination with 26 million overnight stays in the period established, followed by UK and France with 4.8 and 2.4 million overnights, respectively (see Figure 7B). For German tourists, the Andalusian hotel's attributes such as service quality, security, reputation, price, cleanliness, food, and beverage are much valued when they choose a hotel [74]. Although German tourists monopolize the tourism demand in overnight stay terms, this juncture might be perceived negatively in the long-term as a weakness for the Cádiz destination because DMOs and hoteliers are not adequately managing the diversification of segment markets in the territory. Greater efforts are needed to manage and attract American, Swiss, Dutch, English, Italian, and Swedish tourists to enhance the tourist demand in the destination and hotel establishments. Cádiz is a coastal town in Andalusia, and in the last nineteen years tourism has grown because of the beaches, historical and artistic heritage sightseeing, carnivals, and year-round cruise ship tourism [75]. The number of hotels and rooms increased by 15% and 30%, respectively, from 2004 to 2022. However, as mentioned above, the effects of the pandemic crisis provoked the closing of numerous hotels in this province. Cádiz is highly dependent on sun and beach tourism by national and international tourists, and they are essentially interested in coastal tourism. In 2014, this province recorded 2 million overnight-stay visitors, two-thirds being Spanish and one-third international visitors [76], but in 2020, in terms of the number of overnight stays by international tourists, Cádiz was the province of Andalusia (−82.1%) that was most affected by the pandemic crisis.

French tourists occupy the first place in terms of overnight stays in Córdoba's hotel establishments. French tourists are well established in the city of Córdoba, as well as German and English tourists. These three tourist markets represent the highest number of overnight stays in Córdoba's hotels: French tourists (1.7 million overnight stays), German visitors (1.1 million), and English visitors (940,000 overnight stays) (see Figure 7C). Tourists from Italy and the US are highly appreciated by hoteliers, but the number of overnight stays by both segment markets in these establishments does not reach the French, German, and British tourist numbers. For example, French and German tourists like to visit Andalusian destinations for the purposes of relaxation, physical motivations, and cultural and natural tourism, while British visitors are motivated by pleasure-seeking and relaxation activities [77]. The number of hotels increased by 9.2%, and the number of hotel rooms by 20.5% in the period analysed. In 2020, the number of overnight stays at hotels by international tourists fell three times more than the number of Spanish overnight stays at hotels in Córdoba. International tourists like to visit the city of Córdoba for its tourist values, hotels, and complementary services [78].

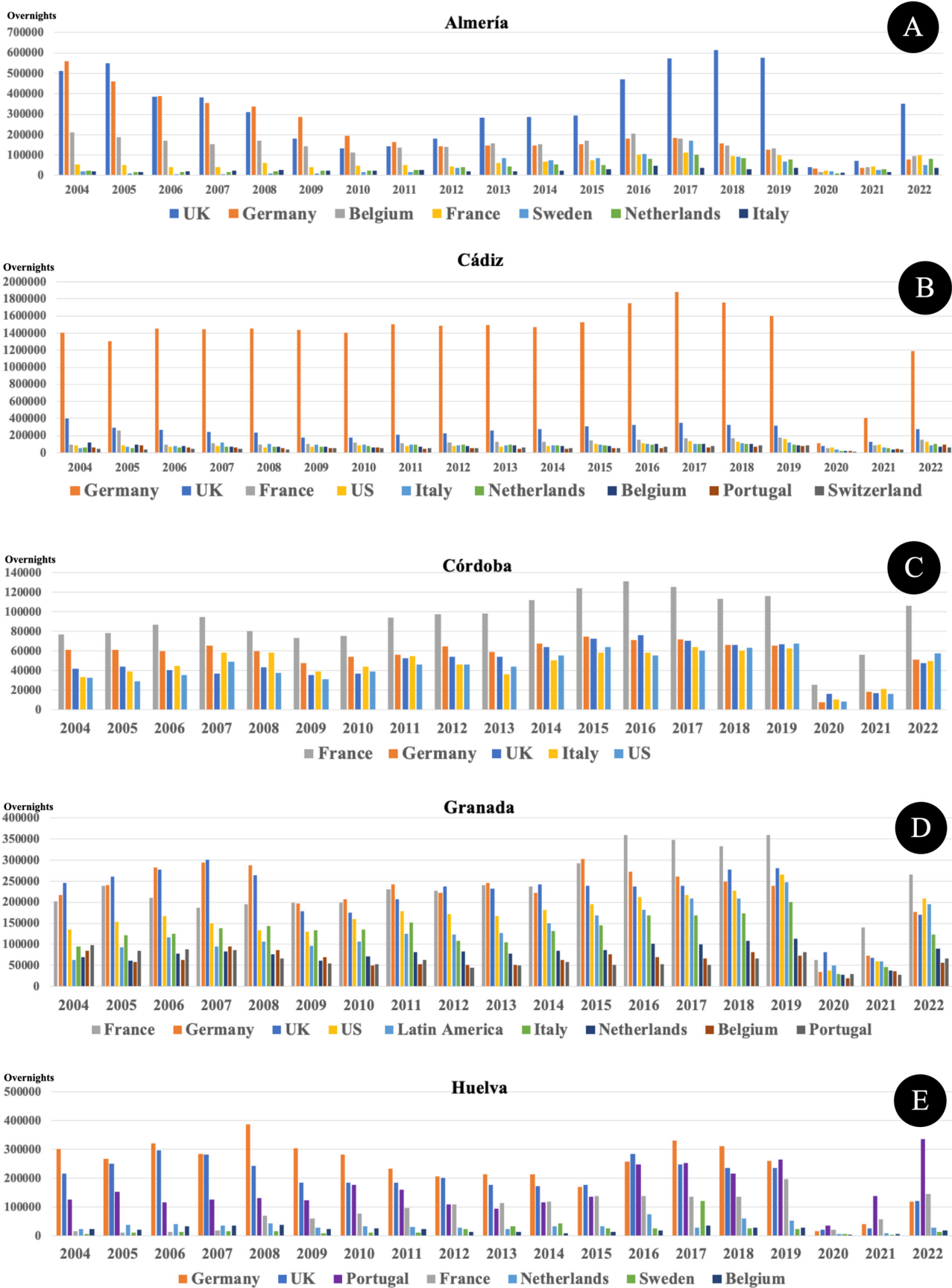


Figure 7. Cont.

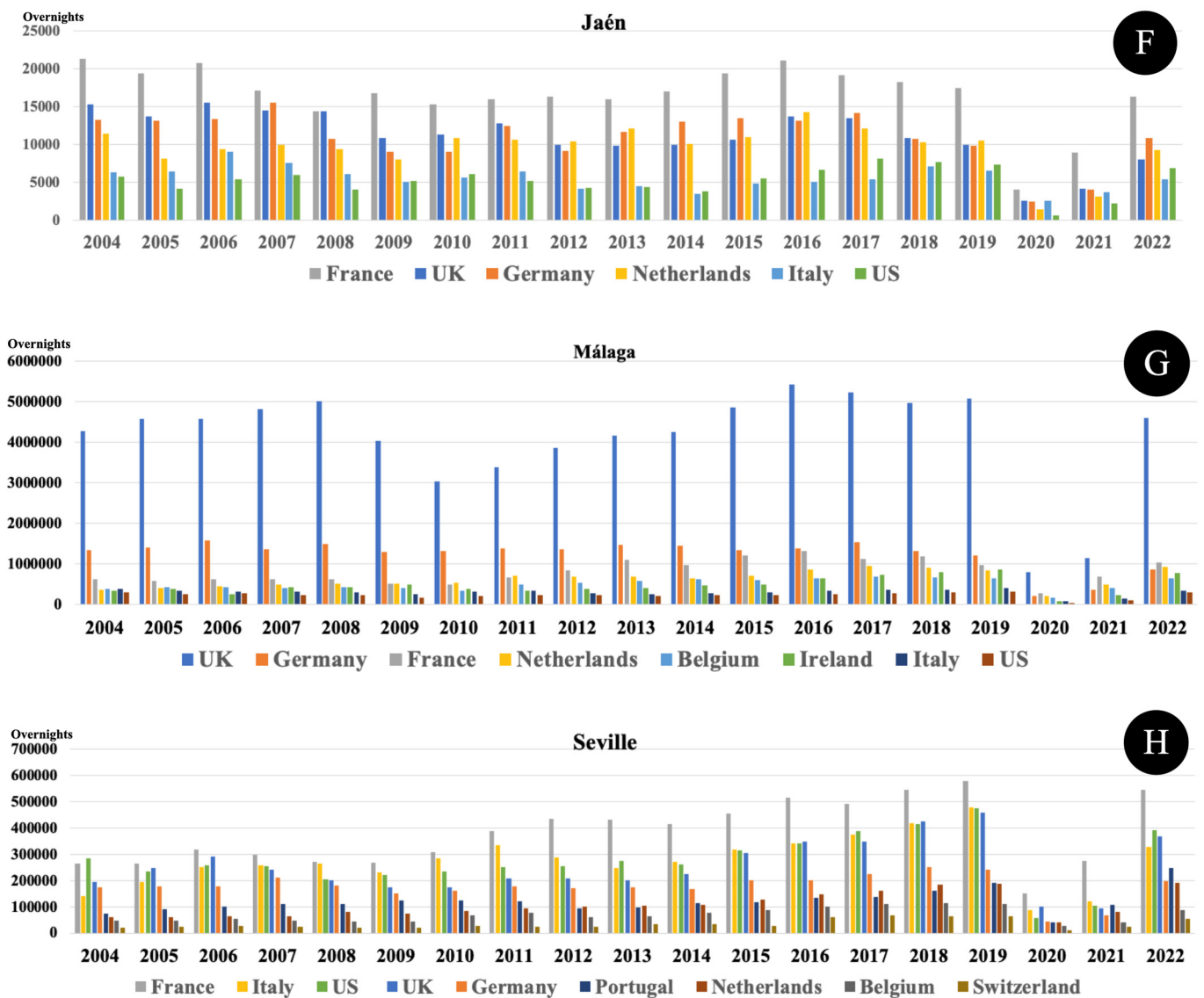


Figure 7. Number of overnight stays in Andalusian provinces, by country of residence (2004–2022). Source: Own elaboration from IECA [2]. Note. Figure 7 presents the number of overnight stays by Andalusian province in the period analysed (2004–2022).

In the province of Granada, French, German, and English tourists are spread almost equally by number of overnight stays at hotels. French tourists occupy a leading position with 4.5 million overnight stays, German tourists are in the second position with 4.3 million, and in third position is English tourists with 4.2 million overnight stays. Moreover, American, Latin American, Italian, Dutch, Belgian, and Portuguese tourists are regulars to visit and stay overnight in the city of Granada. In this province, the number of hotels has been significantly reduced by -10.7% , and the number of rooms increased by 35% within the set period. This city is very attractive in cultural and sun and beach activities for international tourists. From 2016 to 2020, the trend has notably reversed for French tourists in terms of overnight stays (see Figure 7D). As a matter of fact, the main aim of Granada's DMO is to make the province's attractions known worldwide so that the number of visitors for cultural, and sun and beach tourism activities is increased through international tourist fairs, international tourist conferences, and promotional campaigns through digital channels in Spain and other European destinations, amongst many other activities [79]. Like the city of Córdoba, most international tourists visiting this city come from the Málaga and Seville destinations. Paradoxically, Granada presents the highest

tourist saturation index by overnight tourist stay per number of days and inhabitants in Spain [80].

The sociodemographic profiles of tourists who spend the night in the hotels of Huelva are chiefly German tourists with 4.5 million overnight stays in the period under review, followed by English tourists with 3.7 million, and Portuguese tourists with 3 million, as shown in Figure 7E. The number of hotels increased by 6.3% and the number of rooms by 45.1% in the period studied. It is important to underline that domestic tourism represents 61.7 per cent and foreign tourists 38.3 per cent of total tourism demand in this tourist destination. The growth of tourism in the province of Huelva and the rest of the Andalusian destinations has also been mirrored in the construction of new hotels in the last years, thanks to the Qualification of Hotel Accommodation Program [81]. Huelva is localized in the Costa de la Luz area. This tourist destination manages very well the national and international tourism flows. For example, in 2020 Spanish tourists were the main visitors in Huelva, and the number of overnight stays at hotels by Spanish tourists declined by −53.6%; this was less affected by the pandemic than the number of overnight stays by foreign tourists, which was −87.2%. This was the main reason why the hotel occupancy rate did not suffer severely the impact of the pandemic in 2020 and 2021. The segments of the tourism market in which hotels and DMOs operate produce better performance in certain seasons, reduce the seasonality, and increase the hotel occupancy rate [82]. This city does not have its own airport like the rest of provinces; most international tourist arrivals came from the Germany, UK, Portugal, France, Netherlands, Sweden, and Belgium markets. The nearest airports to Huelva's city are Faro International airport (FAO) in Portugal, and Seville, Jerez, and Málaga airports in Andalusia. During the pandemic crisis, the number of international overnight stays fell by −87.2%, but in 2021 and 2022 this was the largest growth in percentage terms: 133% and 177%, respectively.

Jaén is the Andalusian province that attracts the lowest number of tourists [33]; it is quite difficult to consider the tourism industry as a viable alternative for Jaén's local economic development. During the period established of this study, the number of hotels increased by 1.9%, most of them rural hotels, and the number of hotel rooms increased by 11.9%. Its main economic activity is the production of olive oil, and recently this city has been focusing on oleo-tourism managed by local actors, which is offering new opportunities in the tourism industry of this territory [83]. French tourists are the most contributory by number of overnight stays at Jaén's hotels with 315,000 overnight stays, the English market is next with 211,000, and then the German market with 208,000 overnight stays, as we can see in Figure 7F. The Dutch, American, and Italian markets also have a relevant position in the tourist destination of Huelva and its hotel establishments. In 2020, the province of Jaén was the most resilient in the pandemic crisis in terms of the hotel occupancy rate (−31.4%) because most its hotels are focused on being rural hotels and their main clients are Spanish tourists. Foreign tourism fell by −51.2% in 2020, and this dragged down the number overnight stays at hotels by foreign tourists by −76.2% [84]. Nonetheless, the number of foreign overnight stays at hotels increased by 41%, and Spanish overnight stays by 18.7%, in 2022. This positive trend indicates that recovery of the tourism industry is taking place, but these figures are still very far from the data in 2019. These results suggest that hotel operators and DMOs need to develop specific promotional campaigns through digital channels in their main segment markets to recover the pre-pandemic figures for number of tourists and overnight stays.

Figure 7G presents the province of Málaga as the first by number of foreign overnight stays in the Andalusian territory. This city has the greatest number of hotels and rooms in Andalusia, and its extensive tourism, cultural, leisure, and adventure offerings make it very attractive to visit by tourists. In 2020, the number of hotels decreased by −40% and the number of beds by −45.2% due to the effects of the pandemic crisis, which are unprecedented figures. The consequences of the pandemic crisis provoked the closure of more than 80% of hotels on the Málaga beachfront [85]. Ignoring the effects of COVID-19, the number of hotels and rooms has grown constantly from 2004 to 2022, by

13.1% and 31.5%, respectively. Most four- and five-star hotels are localized in the Marbella and Torremolinos municipalities. The sociodemographic profiles of tourists who spend the night in the hotels of Málaga are English tourists with 78.1 million overnight stays in the entire period analysed. Then, German visitors with 23.7 million, and French visitors with 15.5 million overnight stays. The rest of the tourism demand and segment markets in Málaga destination are very polarized (e.g., Dutch, Belgian, Irish, Italian, American, Latin American, Swedish, and Danish tourists, amongst many others) due to the diversity of the tourist supply of sun and beach, culture, leisure, adventure, luxury, hotels, and gastronomy. Promoting sustainable tourism in an urban context such as Málaga city improves the quality of tourism supply and demand [86]. Moreover, one of the most important key factors of Málaga as an international tourist destination has been the Málaga Costa del Sol airport (AGP); the accessibility and connectivity worldwide that this infrastructure provides to the city triggered the planning and organization of tourism development in this city. In 2023, this airport provides globalized accessibility and connectivity to the Málaga tourist destination and flights to 151 destinations by 61 commercial airlines around the world [45,87]. To emphasize the importance of Málaga airport in terms of tourists and its effects on the number of foreign overnight stays at hotels, in 2020 AGP airport saw just 5.2 million passengers pass through its terminal, a drop of -74% year-on-year, and consequently impacted on the Málaga hotel occupancy rate by -46.7% in comparison with 2019 [17]. Málaga dramatically received only 3.5 million tourists in 2020, a drop of -67% in comparison with the previous year, that is, in one single year more than 14 million passengers and tourists stopped coming to this city [33], a drop of -51% in 2021 compared to the data for 2019 (27 million passengers and tourists did not stay in hotels and they did not visit the city of Málaga). These results were very detrimental to the Málaga economy since it is highly dependent on the tourism sector.

Finally in this subsection, we tackle the main tourism segments in the province of Seville. During the period under review, French tourists held the number one position by overnight stays at Seville's hotels with 7.2 million, followed by Italian tourists with 5.3 million, and American tourists with 5.2 million overnight stays (see Figure 7H). The rapid increase in tourist flows and passengers at Seville airport goes hand-in-hand with the development of new hotel establishments in the last 20 years [88] (Díaz-Parra and Jover, 2021). We must not forget that 75% of international tourists visit this region by air. Indeed, Seville airport (SVQ) experienced a 75% growth in passenger numbers from 2015 to 2019, reaching 7.5 million travellers in 2019, the highest figure in its history [89,90]. Like the city of Málaga, the rest of the tourism demand and segment markets in Seville's capital are very polarized such as English, German, Portuguese, Dutch, Belgian, Swiss, and Latin American, amongst many others. Furthermore, the number of hotels and rooms has increased by 24% and 42%, respectively, from 2004 to 2022. The tourism supply of Seville is very varied; in fact, Seville's importance lies in its tourism supply such as accommodation, museums, tourist attractions, infrastructure, shops, gastronomy, and recreational areas [91]. The tourism industry plays a central role in Seville's economy and has overdependence on this sector [92]. Seville also shows evidence that overtourism and gentrification are great problems that must be resolved [93].

4.2. A Global Vision of Tourism Demand in Andalusia

The literature review has addressed the importance of airports and the numbers of hotels and rooms in the tourism demand on the Andalusia destination. Moreover, the number of passenger arrivals at Andalusian airports has a direct impact on foreign and Spanish overnight stays and the occupancy rate of Andalusian hotels. Sánchez-Ollero et al. [94] note that Andalusian hotels can improve their occupancy levels and increase the number of overnight stays because of the proximity of the airports' locations and the coastline. Figure 8 shows the correlation between the evolution of passenger arrivals at Andalusian airports analysed and the total overnight stays in the Andalusia destination and also its eight provinces. The tendency of growth in passengers and overnight stays from

2004 to 2019 is the same on the timeline. In 2020, we can see the same drastic fall in these two indicators because of the pandemic crisis, but in the years 2021 and 2022 the number of passenger arrivals and overnight stays are aligned in recovering to pre-pandemic levels.

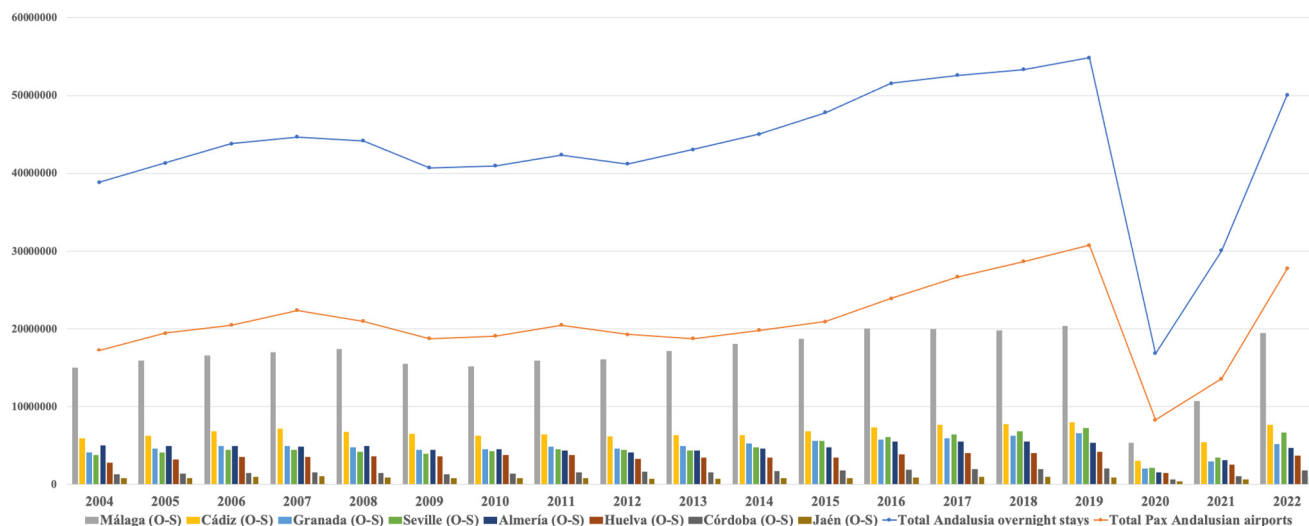


Figure 8. Total passenger arrivals at airports and total overnight stays by province (2004–2022). Source: Own elaboration from IECA [2]. Note: O-S is overnight stays.

Moreover, Figure 8 presents the city of Málaga as the first by number of total overnight stays in the Andalusia region, followed by Cádiz, Granada, Seville, Almería, Huelva, Córdoba, and Jaén. For example, in the period examined (2004–2022) Málaga hotel establishments had 314.5 million overnight stays (foreign and Spanish tourists), and Cádiz 125 million. These figures have immediate economic and social effects in these two territories. Results show us that Andalusia and its eight provinces are highly dependent on tourism industry and how passenger arrivals might condition the number of overnight stays at hotel establishments and their occupancy rates (see Figure 8). Therefore, the type of tourist destination, the geographic area, and air and ground accessibility are factors that encourage a hotel's social capital and its overnight stays [95].

At a more specific level, Figure 9 shows the relevance of foreign and Spanish overnight stays by province. In the case of the provinces of Málaga and Seville, the number of foreign overnight stays predominate over Spanish overnight stays, particularly in Málaga hotel establishments where the number of foreign overnight stays is nearly double the number of Spanish overnight stays. These data are very significant because during the COVID-19 pandemic, Málaga and Seville were the worst affected with -81% (11.8 million overnights) and -79.8% (3.5 million) foreign overnight stays, respectively, and a decrease in total overnight stays by -73.6% and -71% , respectively. These data are very detrimental for the Málaga and Seville economies since these provinces are really dependent on the tourism sector. Conversely, Almería, Cádiz, Córdoba, Granada, Huelva, and Jaén provinces and their hotels have become more reliant on Spanish overnight stays, and domestic tourism considerably helped to maintain many hotels opened during the pandemic. Falk et al. [96] analysed domestic tourism by the number of overnight stays in all French regions, and the results were that coastal regions and nearby regions to national parks received a significant surge in domestic travel flows during the COVID-19 summer of 2020. The domestic tourism demand improves the resilience of regional tourism and can mitigate for the losses in domestic overnight stays in these destinations [97].

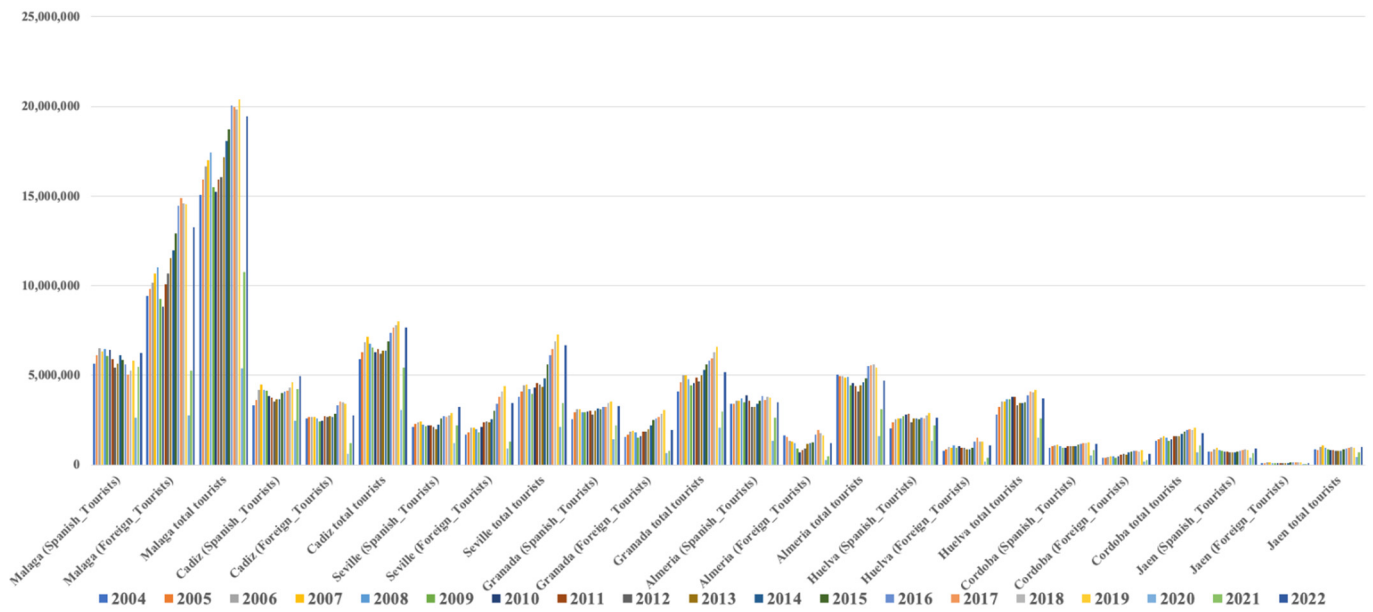


Figure 9. Total overnight stays and Spanish and foreign overnight stays by province (2004–2022). Source: Own elaboration from IECA [2].

The macroeconomic results can be broken down in the Andalusia destination by total passenger arrivals at Andalusian airports, total overnight stays, Spanish and foreign overnight stays, and the evolution of Andalusian hotel occupancy rate, to see how these tourism demand indicators are aligned in the timeline of the period examined. For instance, Figure 10 reports how Spanish overnight stays’ growth exceeded foreign overnight stays in the period of the pandemic crisis (2020–2022) at Andalusian hotel establishments. Moreover, in 2020 the drastic reduction in the number of passenger arrivals (−73.1%) had negative direct consequences in the rest of the demand indicators such as hotel occupancy rate (−38.7%), total overnight stays (−69.3%), Spanish and foreign overnight stays (−55.7% and −81.2%, respectively). Meanwhile, the hotel occupancy rate trend decreases in the timeline analysed, as we can see in Figure 10. Tourism demand, the hotel occupancy rate, and overnight stays at hotels decreased significantly because the number of flights was reduced or cancelled worldwide under the COVID-19 epidemic situation [98].

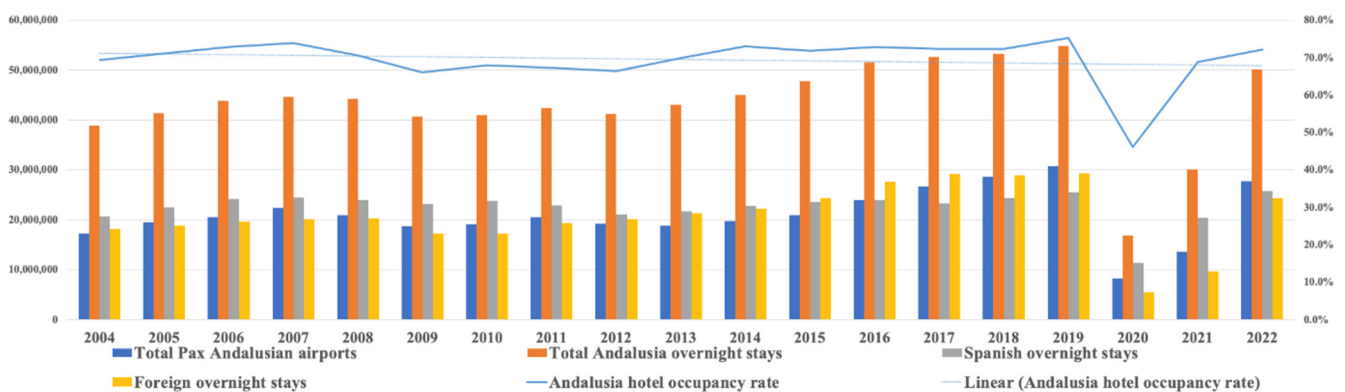


Figure 10. Total passenger arrivals at airports, hotel occupancy rate, and Spanish and foreign overnight stays in the Andalusia destination (2004–2022). Source: Own elaboration from IECA [2].

Nevertheless, when the number of passengers arrivals at Andalusian airports began to rise, the other indicators also quantitatively increased in positive terms with the previous year. Actually, many OTAs sell airline tickets and hotel rooms as a package tour. Then,

these OTAs claim commissions from hotel operators and commercial airlines [99]. The impact of commercial airlines and airports on Spanish tourist destinations have favoured the number of overnight stays and the occupancy rate at hotels of Spain [100] because most of the tourists who stay in Spanish hotels are foreigners [101].

Therefore, the most remarkable research results are shown in Figure 11, which reveals the main three tourist markets in the Andalusia destination and its eight provinces in the period examined. English tourists are the backbone of tourism in the Andalusian territory in overnight stay terms with 103 million, the second market for Andalusian hoteliers are German tourists with 67 million overnight stays, and the third tourist segment that dynamizes and promotes the overnight stays at Andalusian hotel establishments are French tourists with 35 million overnight stays. These findings are completely aligned with the distribution of passenger traffic by European markets at Spanish airports, which were UK (27.2%), followed by Germany (17.6%), and France (10.1%) from 2015 to 2022 [17]. Gallego et al. [55] found that the over-reliance of the Spanish hotel industry on the UK, Germany, and France segments might be a long-term strength and weakness. When the economic situation is buoyant, these three tourist segments improve the economics of Andalusian tourist destinations and hotels' overnight stays. Conversely, in difficult times and external crises such as the pandemic or financial crisis, these three segment markets can multiply the negative effects on hotels' overnight stays and provoke a massive drop in tourism demand.

In addition, this research also illustrates how English tourists are the main market of Almería and Málaga hotel establishments by number of overnight stays. In the case of French tourists, the primary beneficiaries are Córdoba, Granada, and Sevillian hotels in overnight stay terms. The closest markets, such as French and Portuguese markets, have increased in Andalusian destinations due their proximity to home in the period of the pandemic [102]. The proximity of European markets to the Andalusia destination is an added value to attract different international markets. Furthermore, coastal cities such as Huelva, Cádiz, Almería, Málaga, and Granada provinces are very visited by German tourists, and the number of overnight stays in these provinces confirm the importance of this segment market in the Andalusian territory, although German and English markets destabilized the number of overnight stays at Andalusian hotels due to the imposition of restrictions on travel in their own countries by the COVID-19 pandemic [103,104]. Indeed, according to the Junta de Andalucía [48] the number of overnight stays in Andalusian hotels increased by 25% in the first quarter of 2023 compared with previous year, and it is expected to exceed the pre-pandemic levels, despite the effects of the coronavirus crisis, Brexit, Russia's invasion of Ukraine, and economic stagnation in the Eurozone. Andalusia constitutes an interesting case of study because it attracts a large amount of tourism demand. English, German, French, Italian, Belgian, and American tourists have enormous weight in the Andalusian tourism industry and its economy. Moreover, it should be remembered that domestic tourism generates 35.1% of the overnight stays at Andalusian hotel establishments.

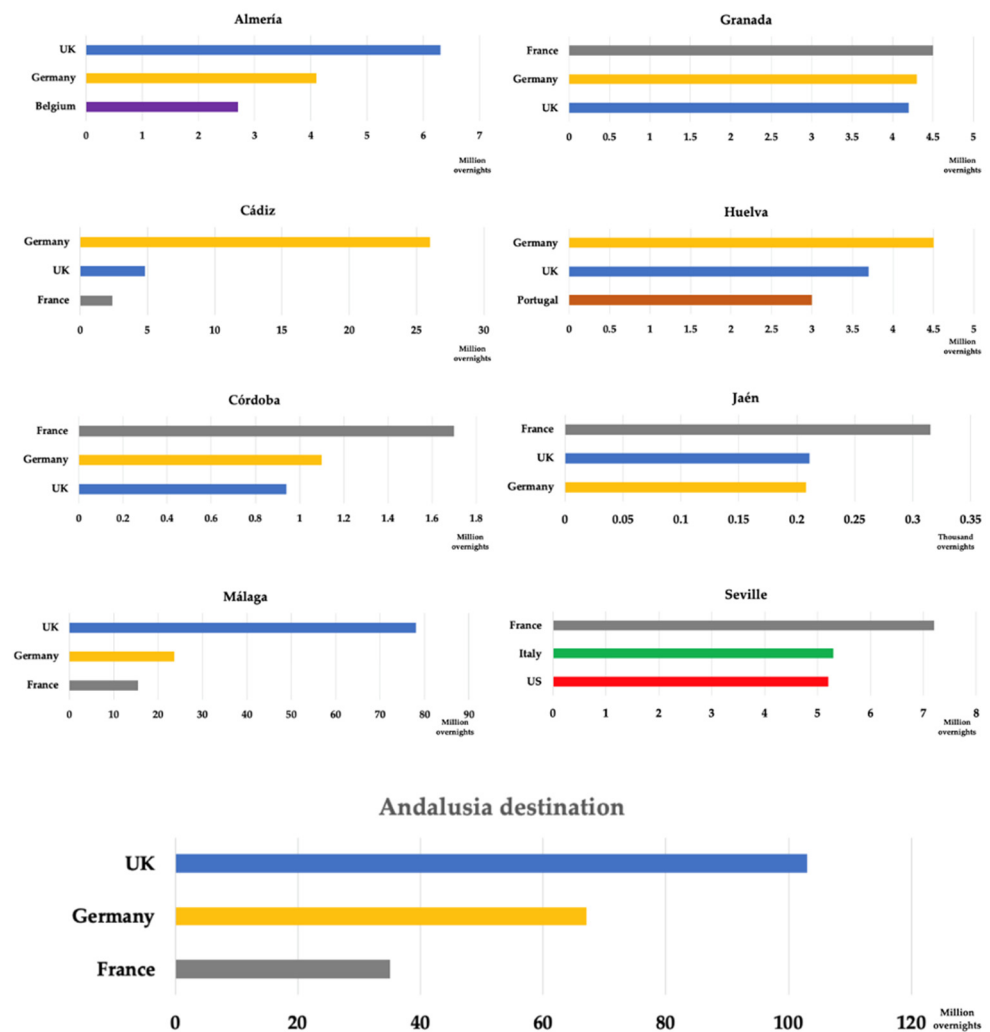


Figure 11. The three main tourist markets by overnight stays in the Andalusian destination and its eight provinces (2004–2022). Source. Own elaboration from IECA [2].

5. Conclusions

The findings reveal that English, German, and French tourists are the major markets of the Andalusian provinces and their hotel establishments in overnight stay terms. These results are similar to those obtained from Gallego et al. [55], and Aguilar et al. [4] which demonstrated that UK, Germany, and France are the main issuing markets of international tourists to Spain. Furthermore, these three segment markets are completely aligned with the number of passenger arrivals by European destinations at Spanish and Andalusian airports, since the UK is the first country by number of passenger arrivals, followed by the Germany and France markets [17]. These findings suggest that these three tourist markets depend on the air accessibility and connectivity provided by Andalusian airports analysed in this study.

Málaga, Cádiz, Almería, Granada, and Huelva coastal provinces have benefited the most in terms of numbers of English, German, and French tourists' overnight stays. On the other hand, Seville's capital presents the best figures in overnight stay terms of the three inner cities, followed by Córdoba, and Jaén.

Nevertheless, the results of the current study support the idea that when the economic situation is buoyant, these three tourist segments improve the economics of Andalusian tourist destinations and hotels' overnight stays. Conversely, in difficult times and external crises such as the pandemic or financial crisis, these three segment markets can multiply the negative effects on hotels' overnight stays and provoke a massive drop in tourism

demand. Instead, English, French, and German potential markets helped to recover the Andalusian tourist activity after the pandemic crisis [105] because they like to enjoy the sun and beach, excellent climate, gastronomy, nature, and culture of Andalusia. However, these three segment markets monopolize the tourism demand in overnight stay terms. This supremacy is perceived negatively in the long-term as a weakness for the eight Andalusian provinces because DMOs and hoteliers are not adequately managing the diversification of segment markets in the territory, and they are showing that they are highly focused on English, German, and French consumers.

Our findings reveal that due to the complexity of the problems of the pandemic crisis, Russia's invasion of Ukraine, Brexit, and economic stagnation in the Eurozone, in the main source countries of tourists, people have not yet recovered full confidence to be able to travel freely again. It is precisely, for this reason that tourism promotion campaigns can help reduce people's fears and uncertainty in travelling to other destinations. DMOs need to understand and classify other tourist markets in their marketing plans to modify and expand the Swiss, Dutch, Swedish, Norwegian, Finnish, Danish, Chinese, Japanese, Korean, and Canadian market share in the Andalusian destination, and reduce dependence on English, German, and French markets.

Initially, the analysis of these findings has theoretical implications in the literature review. First, this study shows the importance of the relationship between hotels and airports at cities. Second, the increase in English, German, and French tourism in the Andalusian destination is likely to reverse when these tourists perceive that this region shows evidence of overtourism and mass tourism [106]. The results of this research contribute to the growing literature on crisis management and resilience at tourist destinations and how specific segment markets and tourist overnight stays at hotels can improve the tourism demand and supply.

The findings of this research are relevant for hoteliers and DMOs aiming to recover the number of overnight stays to pre-pandemic levels and the diversification of segment markets. In practice, the findings could provide hotel operators with encouragement to communicate specific information about Andalusian tourist attractions and hotels in other international markets such as the Norway, Denmark, US, Japan, and China markets to reduce the high rate of dependence on the English, German, and French tourist markets. The empirical results may also be useful for a more in-depth analysis using financial indicators specific to hotels, such as revenue per available room, average daily rate, and occupancy. Taking into account the Andalusia regional context, this empirical study contributes to demonstrating the importance of airports and how these infrastructures could enhance hotel performance and the revenue per available room (RevPAR) in overnight stay terms [107,108].

The main limitation of the study is that hotel operators and DMOs do not provide information related to the gender of the tourists and which means of transport the tourist used to visit the city and stay overnight at the hotel. In addition, the level of aggregation in this study with data on overnight stays at the province level is very high and does not take into account the heterogeneity of hotels by different price segments and locations [109]. Another limitation to highlight is that AENA does not provide information related to passengers' genre and age, to address passenger behaviour and travel preferences in overnight stay terms.

Among the issues for future research are opportunities to analyse the eight indicators examined in this research in other countries and regions to compare results and conclusions. Moreover, it would be interesting to analyse the importance of airports in tourists' overnight stays of tourist destinations, or even to assess the number of foreign overnight stays at hotel establishments and cities which have airports and cities that do not have airports, to measure the correlation between the number of overnight stays at hotels and airports. These future results may be of use to hotel operators, DMOs, and policymakers in their decision-making processes [34,110].

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