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Current trends in tourism development in Galicia

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Abstract: *In the years following the COVID-19 pandemic, international tourism has continued to grow rapidly. Spain continues to be the second most popular tourist destination in the world. Tourism in Galicia is also experiencing rapid growth. There are a number of prerequisites for this, the most important of which are the Camino de Santiago and the rich cultural and historical heritage in the region. This allows the development of both traditional types of tourism and alternative forms of tourism.*

Keywords: International tourism, domestic tourism, alternative tourism, Galicia, Camino de Santiago

Introduction

Tourism has enormous economic, environmental, social, cultural and political importance [1]. The positive trends of 2025 were followed by uncertainty stemming from geopolitical risks, ongoing conflicts and trade tensions, which are affecting traveler confidence. On the other hand, international tourism in 2026 will be driven by solid consumer demand, improved air connectivity and increasing outbound travel from emerging markets. Major international events such as the 2026 Winter Olympics in Milan-Cortina (Italy) and the 2026 FIFA World Cup (Canada, the United States and Mexico) will also contribute to the growth of international travel.

Spain is one of the most popular tourist destinations in the world, with 93.5 million tourists in 2025 (No. 2 in the world) and tourism revenues of \$106.5 billion (No. 2 in the world) [2]. In Southern Europe and the Mediterranean region, the country is second only to France, significantly ahead of countries such as Italy, Greece and Portugal. If the number of tourists visiting Spain continues to grow at the same pace, the country could become the most popular tourist destination not only in the region, but also in the world.

Galicia was a relatively latecomer to the tourism boom that has spread across Spain in recent decades, but the coastal regions and Santiago de Compostela have become popular tourist destinations. Galicia is integrated into the so-called “Green Spain”, a project created in 1989 by the General State Administration, the Basque Country, Cantabria, Asturias and Galicia as an alternative to traditional tourism related to sun, water and sand. Compared to coastal tourism, this is a different type of tourism, including alternative types, such as cultural, rural, spa, eco, wine, religious tourism, etc.

The subject of the study is the analysis of the features and trends of tourism development in the region of Galicia. The object of this study is the development of tourism in Galicia at the regional and local level.

The main goal is to analyze the factors and causes that led to the current tourist situation in Galicia and the possibilities for its development in the future, influenced by modern trends in tourism development.

Both basic scientific methods such as analysis and synthesis, induction and deduction, historical method, as well as mathematical-statistical, sociological and graph-analytical methods were used. Last but not least, purely tourist methods were also used.

Strategic documents for the development of tourism were used, as well as data from the National Statistical Institutes of Spain, Galicia and Portugal. A number of Iberian researchers are also working on this issue: Pardellas and Padín [3]; Seoane and García [4]; Rodríguez [5] and others.

Theory and Methodology

1. Previous research

The Tourism Development Plan (2010-2013) of the Galician Ministry of Tourism already highlights the need for tourism zoning and statistical information to determine the relative importance of Galician regions in tourism [6].

The Galician Tourism Strategy until 2030 aims to promote authentic and sustainable tourism. It seeks to strengthen the perception of the Galician population of tourism as a driver of economic growth, so that residents feel even more integral to the tourism sector. The strategy further consolidates Galicia's position as a more international and less seasonal destination, with greater business profitability, while prioritizing territorial balance and the fight against depopulation [7].

Regarding its tourism strategy, the Galician government is focused on promoting sustainability and the internationalization of the sector as part of its 2025-2030 plan.

Tourism in Galicia will focus on consolidating the sustainable model that has generated positive results in recent years. The forecasts highlight the following key points:

- Sustainability and renewal: The Galician Tourism Strategy 2025-2030 prioritizes sustainable tourism that respects local communities, cultural heritage and the environment. The renewal of tourist infrastructure will also be promoted, especially in thermal and rural destinations;
- Internationalization and diversification: The aim is to attract more international tourists, who represented 20% of the total in 2023. The promotion of key international markets such as the United States and Asia will be strengthened, in addition to participating in global events such as Expo 2025 in Osaka;
- Investment and modernization: The 2025 tourism budget includes 146 million euros allocated to digitalization, professional training and grants to modernize tourism offers. The capacity of small tourist municipalities will also be strengthened;
- Camino de Santiago and the Holy Year of Compostela: Improvements to the Camino routes will continue and events will be planned for the Holy Year of Compostela 2027, reinforcing its role as a driving force for tourism in Galicia;
- Galicia seeks to strengthen a diversified, high-quality tourism model, aligned with the principles of sustainability and innovation, in order to consolidate its global appeal, continuing the development of destinations that is still underway. This includes attracting tourists from all over the world, while maintaining a sustainable tourism model that does not harm the local population;
- The region will continue to attract leading companies with extensive experience in this sector. Agencies like Galicia Travels, for example, offer a wide range of activities, including trips and experiences, from Santiago de Compostela, for all types of travelers, with the aim of introducing this beautiful region of Spain to anyone who wants to discover it [8].

2. Methodology

Tourism is also playing an increasingly important role in the economy of Galicia. In its analysis, two types of tourism indicators are used: basic (tourist arrivals, international tourism revenue) and synthetic (revenue per tourist, tourism efficiency, tourism intensity, tourism expenditure per capita, localization index, etc.), and these indicators are calculated on the basis of the basic ones.

To determine the place of tourism in the local economy or as a share of the national economy, a formula called the “localization index (IL)” is used. It helps to find the place of tourism in the system of the local, regional or national economy. The localization index is an important indicator in tourism analyses, along with a number of other mathematical methods and models.

$$IL = \frac{S_j : S}{N_j : N},$$

where S_j is the number of people employed in the tourism sector in the region;

S is the number of people employed in the tertiary sector in the region;

N_j is the number of people employed in the tourism sector of Galicia; N is the number of people employed in the tertiary sector of Galicia.

When the index is above 1, it means that the sector is leading, specializing for the region [9].

Results and Discussion

1. Key indicators

The development of tourism in Galicia is characterized by an increase in the number of tourists after the Covid pandemic from 4.2 million in 2021 to 7.2 million in 2023 and reaching record levels with over 8.2 million tourists in 2024 staying in accommodation in the region. The number of overnight stays is also increasing and reaches 13.6 million in 2024.

Revenues from international tourism amount to 8.1 billion euros. The share of tourism in Galicia's GDP increased from 3% in 1995 to 6.6% in 2024 [10]. The average income per tourist in Galicia is 1,030 euros, compared to 1,136 euros in Spain [2].

The tourism efficiency (tourism revenue per capita) in the same year was around 1030 euros, which is also a high value and taking into account the huge tourism resource potential, we conclude that Galician tourism has significant potential for its future development.

The tourism intensity (number of tourist arrivals related to the population) for Galicia in 2024 is 3,222. The value is quite high, and this indicates the significant potential for receiving more tourists, which can lead to overload and the emergence of social conflicts and contradictions.

International tourism continues to gain weight in the community, representing 30% of the total (1,832,907) in 2024, compared to 1,616,929 in 2023 (Fig. 1). The increase in arrivals from the United States (+22.1%), Italy (+11.8%) and Germany (+5%) stands out, consolidating the destination's internationalization strategy. Interestingly, 80% of tourists visiting Galicia return. A leading reason is the lack of overcrowding, typical of many other tourist destinations.

It is worth noting that the highest average expenditure of domestic tourists visiting Galicia is on gastronomy (77 euros), followed by health and wellness tourism (73.20 euros), cultural tourism (72.90 euros), city tourism (72.00 euros) and conference and trade fair tourism (71.70 euros) [10].

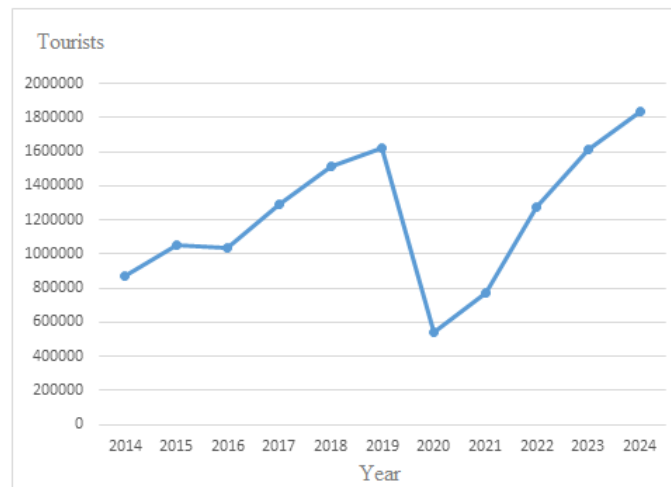


Figure 1. Number of foreign tourists visiting Galicia (2014-2024) (Source: INE, IGE)

2. Regional characteristics

The place of tourism in the Galician economy is determined using the “localization index”. Since 1997, Galicia has been divided into 53 regions (18 in A Coruña, 13 in Lugo, 12 in Ourense and 10 in Pontevedra) [11]. Of these, 13 have an index above 1, which means that tourism plays a leading role (Fig. 2).

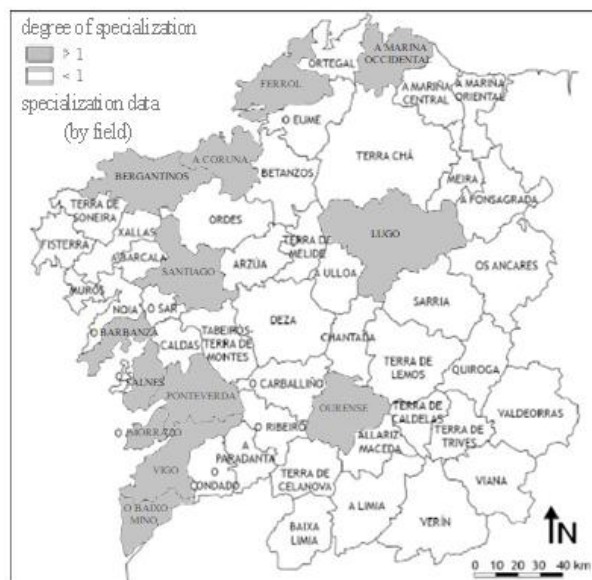


Figure 2. Tourism localization index in Galicia, by region (Source: INE, IGE and own calculations)

The classification according to the level of tourism shows that Santiago, A Coruña, Vigo and O Salnes are the four districts with the highest indicator. There is, of course, an explanation for this.

Over 85% of tourists who come to Galicia visit **Santiago de Compostela** (96 thousand inhabitants) [12]. The city is the center of the region and the capital of Galicia, with the Cathedral of Santiago de Compostela being the most visited tourist site in the region. In addition, the old part of the city of Santiago was declared a World Heritage Site by UNESCO in 1985, known for its numerous monuments, museums, parks and gardens, art galleries, exhibition halls and panoramic views.

The city is home to the tomb of the apostle Santiago. Since the Middle Ages, the city has been a center of attraction for Catholics who venerate the saint. If in 1985 the Sanctuary of Santiago de Compostela registered a total of 690 people who had received an application, in 2009 their number was 145,877 and in 2019 it was 347,578. During the pandemic, their number decreased to 54,144 pilgrims (2020), to reach the record values of 499,241 pilgrims in 2024 [13] (530,998 for 2025). The centuries-old cultural importance of the Pilgrims' Way to Santiago de Compostela was recognized in 1987 by the Council of Europe as the “First Cultural Route of Europe” [14].

Next to the Cathedral of Santiago de Compostela is the Palacio Helmires, a former episcopal palace and now an exhibition hall. Also worth admiring are the imposing facades of the Colegio de San Jerónimo, the Paso Rajoy, the seat of the Galician government, and the Antiguo Hospital Real, founded in the 16th century as a hospice for sick pilgrims and now a luxurious government hotel. The Praça da Quintana, a former cemetery founded in the 19th century to house the tomb of St. James, and the Praça das Prateiras, a former silversmiths' guild, are two interconnected squares that create a magnificent atmosphere in Santiago de Compostela. The former monastery of Santo Domingo de Bonoal, a ten-minute walk northeast of the center, is now the Museum of the Galician People. To tell the story of how the pilgrimage to Santiago de Compostela came about, a Pilgrims' Museum was built, and a few meters down the road is the church of San Martín Pinario.

Santiago de Compostela is not only a city that attracts millions of pilgrims from all over the world, but also exudes a unique atmosphere with magnificent old buildings, excellent fish restaurants and winding medieval streets with numerous souvenir shops, making it an attractive destination for many visitors from all over the world.

Despite its inland location, it is very well located, having access to the Atlantic Highway and an airport with national and international flights [15].

The region of A Coruña, with **A Coruña** (249 thousand inhabitants) [12] as the largest city in the region, is in second place. This is a region located on the Atlantic coast, unlike Santiago, which is inland. Beautifully perched on the Atlantic coast, the city has been a port for different peoples and cultures, which for over 2000 years have enriched the history of A Coruña with a legacy of legends, myths and cultural history. A Coruña is the administrative center, a region of vast green landscapes, with a rich Celtic and Roman heritage, which gives the city a mystical and magical charm to this day. Unlike the region of Santiago, where the city of Santiago de

Compostela is the focus of much of the tourist activity in the case of A Coruña, in addition to the city there are several municipalities with significant tourist importance such as Oleiros, Cuyeredo and Sada. The area is known for its beautiful beaches, with an average annual temperature of 14°C and over 2000 hours of sunshine per year, as well as opportunities to practice water sports such as surfing, sailing, diving and fishing. There is a large marina for yachts and the Alvedro Airport, located near the city.

The architecture of A Coruña is saturated with different styles from the 19th century, which give the city a variety and impressive appearance. The old part of the city is interesting with the main square of Maria Pita, the Town Hall, the Archaeological Museum with exhibits of the Roman culture of Galicia and beautiful Iberian and Celtic metalwork, the beautiful coastal part with the Rose of the Winds and the Tower of Hercules, built by the Romans in the 2nd century AD, significantly modified in 1790. This 104 m high tower is considered the oldest preserved and still functioning lighthouse in Europe, which is also the emblem of the city. The lighthouse was declared a World Heritage Site by UNESCO in 2009 and is the most popular tourist attraction in the city [5].

Near A Coruña is the city of Arteixo, where the headquarters of one of the largest Spanish companies Inditex (owner of the Zara brand) is located. This allows the rapid development of shopping tourism.

The province of Vigo has the third highest tourism index, and in addition to the city, many of the municipalities such as Bayonne and Nigrán are closely linked to tourism. It is in the municipality of Olivico that there is an estuary, numerous beaches, a fishing port and a marina. Its proximity to Portugal is another reason that explains the additional weight that this tourist area has within the community of Galicia.

Vigo (297 thousand inhabitants) [12] is the largest city in Galicia. It is located on the Udo Ben Bay. The city is famous for its fishing industry, shipyards, food, cultural and nightlife. Vigo is the largest fishing port in Europe and the headquarters of the largest fishing company in the world - Pescanova. The city was chosen as the headquarters of the European Fisheries Agency.

The city of Vigo is a favorite vacation spot for people from different corners of the planet because of its paradise beaches with crystal clear water and beautiful white sand. Some of the beaches have even been awarded the official Blue Flag title by the European Union for the quality of the water and beach services.

Tourists are attracted by the city's beautiful observation towers - these are the Monte del Castro Tower and the Monte del Guia Tower, from which the entire city can be seen.

The district with the city of **Salnes** (111 thousand inhabitants) [12] as its center is located between the Arosa and Pontevedra rivers. It includes 9 municipalities, many of them with significant tourist potential: Sangenço, O Grove and to a much lesser extent Arosa and Cambados. With its beaches and beautiful islands, it attracts many tourists in the summer. These places attract over 35% of the tourists in all of Galicia.

Although it is generally considered that the coastal regions have the upper hand in tourism, two inland areas follow, Ourense and Lugo, which are fifth and sixth, i.e. even ahead of Pontevedra and Ferrol. This result corresponds to the existing important tradition of spa tourism in both cities, to which should be added the Cathedral of Ourense and the Roman Bridge in the city of Burgas, as well as the Roman walls of Lugo, also declared a World Heritage Site by UNESCO.

Ourense (108 thousand inhabitants) [12] is an ancient city with a glorious past. It is surrounded on all sides by mountains that isolate the city from the more populated Galician coast and encourage emigration to the rest of Spain and America. The tertiary sector is the leading one, but there are also numerous tourist sites and it is divided into three parts: medieval, a 19th century square and a modern part. The cathedral was built in 572 and is the second oldest in Galicia. It is located in one of the most charming squares – Praça do Ferro, with well-preserved medieval wooden houses. The Roman bridge that pilgrims cross on their way to Santiago has been preserved. There is an archaeological museum and ancient architecture. Near Ourense are the mineral springs called Las Burgas with a temperature reaching 67°C, and the area is famous for its spas, including the oldest in Galicia – Caldas de Portovia, dating back to Roman times [16]. In the surroundings there are beautiful landscapes and preserved medieval towns, such as Ayarís and Ribadavia.

Lugo (98 thousand inhabitants) (old name Lugo) [12] is the only city in the world that is surrounded by Roman walls that have been completely preserved over the centuries. Therefore, it has been inscribed on the UNESCO World Heritage List since 2000. Lugo is a traditional Roman town. What distinguishes it from other picturesque places in the region is that the entire area is surrounded by a massive wall built of red bricks. It consists of four levels, the outermost of which is about 4 km long. Lugo became a colony of ancient Rome in 180 BC. At that time, a square-shaped fortification was built around the center of the city. About a thousand years later, due to the expansion of the city, the second circle was built. Today, most of the historical buildings are located in it, which have been completely restored. The remaining significant buildings in the city, which are not included behind the walls of the second circle, are located in the third, which was built in the 15th and 16th centuries, when the city was in its heyday. In 1544, construction of the last circle began, and work on it was completed in 1645. 71 towers were built, and the walls reached a height of between 10 and 15 meters.

Pontevedra (83,000 inhabitants) [12] is a famous historical city, culturally rich and has a significant number of architectural landmarks that are worth seeing. History tells us that the city was founded by Teucer, a Greek warrior who participated in the Trojan War, and has preserved its unique medieval center to this day, along with large and small popular squares.

Although not on the same scale as A Coruña or Santiago de Compostela, Pontevedra has its fair share of historical buildings, churches, museums and monuments. Among them are the church of Santa María la Mayor, the Museum of Pontevedra with a collection of magnificent Celtic ornaments, the Casa de García Flores,

the ruins of the Gothic monastery of Santo Domingo and the Monasterio de Poyo, an example of Galician classicism. The incredible atmosphere in the city is complemented by the attractive small and large squares dotted with cafes and bars around them.

El Ferrol (64,000 inhabitants) [12] is located on the Atlantic coast. Ferrol is a major shipbuilding center in Spain, and the shipyard was built during the time of Philip V. It specializes in the construction of warships, as well as the repair of large ships (tankers, gas carriers, ferries, etc.). At the beginning of the century, a large industrial park was built with an area of 1.5 million km². It is the birthplace of General Francisco Franco [5].

3. Tourism specialization

Among the districts that specialize in tourism, the eight most populous also have the largest number of bars and restaurants in Galicia (Table 1). In the period 2014-2024, the regional leader in this regard continues to be Morasão with a growth of 3.9%, followed by Santiago with a growth of 2% and A Coruña with a growth of 1.1. This result can also be explained by the search for an economic alternative to activities that fell into recession during the pandemic [4].

Table 1. Leading areas in Galicia with restaurants (2014-2024)

Location	Region	Operating restaurants and bars, 2014	Operating restaurants and bars, 2024
1	A Coruña	3 270	3 310
2	Viggo	2 892	2 902
3	Santiago	1 512	1 540
4	Ferol	1 223	1 225
5	Ourense	1 128	1 135
6	Lugo	1 016	1 020
7	Pontevedra	950	955
8	O Salnes	883	900
9	Bergantinhos	547	545
10	Morasso	517	537
Total	Galicia	21 393	21 524

Source: Own calculations and Anuario La Caixa

In terms of accommodation in Galicia, in 2024 there were 116,105 establishments (Table 2). Here, the ones with the highest capacity are O Salnes (23,508) and Vigo (11,840). In the first case, the explanation is obvious, O Salnes is a region of great tourist importance in Galicia, including the coastal municipalities of Sangenxó, O Grove, Illa de Arosa, Vilagarcía de Arosa and Cambados, which are a major tourist attraction in the summer.

The Atlantic axis of Galicia passes through the first seven districts, and to these can be added the positions of Ferrol (12) and O Morraso (11) [10].

Table. 2 Leading regions in Galicia by number of overnight stays (2024)

Place	Region	Total places
1	O Salnes	23 508
2	Vigo	11 840
3	Santiago	10 505
4	A Coruña	9 971
5	O Baixo Minho	4 250
6	Lugo	1 045
7	Pontevedra	910
8	O Salnes	870
9	Bergantillos	575
10	O Moraso	500
Total	General Galicia	116 105

Source: own calculations and data from IGE

Conclusion

From what has been said so far, several main conclusions are necessary regarding the opportunities for the development of tourism in Galicia:

✓ The role and importance of tourism in the economy of the autonomous community of Galicia is growing. This is evidenced by the better indicators, especially after the end of the COVID-19 pandemic. The future of Galicia as a tourist destination will depend on how local communities meet and cope with the challenges of the global development of tourism, resisting the numerous competitors in satisfying the needs, desires and expectations of tourists;

✓ The district of Santiago, which has the highest share in terms of specialization in tourism in Galicia, is the third with the largest number of restaurants and bars and the third in terms of number of accommodation places. It is necessary to emphasize not only the great importance of Santiago for tourism in Galicia, but also the role of Os Ancares, Sarria and Fisterra, which, through the French Way, give particular tourist importance to these small settlements. The success of the Camino de Santiago is undeniable for the development of tourism, which is reflected in the indicators related to tourism;

✓ The province of A Coruña is in second place, very close to Santiago, and well above the indicator for Vigo. It is the province with the most restaurants and bars in all of Galicia, but it is also the one that is increasing its activity for the period 2015-2025. In addition to pilgrims, we can add the business activities, conferences and museums that the city of Hercules offers in abundance;

✓ The tourist region of Rías Baixas, especially O Salnes, which ranks fourth in the tourism index, is the province with the highest number of accommodation facilities in Galicia. The Rías Baixas region extends to O Baixo Minho, with special emphasis on the province of Vigo, which ranks third in the tourism index and second in the number of places to stay and eateries;

✓ In addition to coastal tourism and the Camino de Santiago (especially the French Route), there are other attractions offered by the inland areas specializing in tourism, such as Ourense and Lugo. They occupy fifth and sixth place and also have a significant capacity in terms of accommodation and catering.

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